# Customer Estimate

## To Record a Customer Estimate:

1) From the HOME page choose 'Estimates'
2) Choose the Customer:Job
3) If the customer is new, select '<add new> which is at the top of the drop down list, fill in the basic customer information and click OK
4) Choose the appropriate items from the drop down list, adjust prices and tax status as necessary
5) Add a subtotal line by selecting the subtotal item
6) Add any known Other Charges such as freight
7) Review the Sales Tax charged
8) Select the desired Customer Message
9) To print the estimate, from top menu bar select File and Print Estimate
10) The estimates can also be queued for e-mailing, select the 'To be e-mailed' option in the bottom left of the screen— QuickBooks will check the Customer record for an e-mail address—if the e-mail address is missing a pop up window Information Missing or Invalid will appear, enter the e-mail address and click OK
11) Click Save & Close

## To E-Mail the Estimate:

1) If the e-mail option was not selected when creating the estimate, edit the estimate
2) From top menu bar select File then Send Forms
3) A pop up window Select Forms to Send will appear containing a list of all the estimates ready to be sent, each estimate will have a checkmark on the right indicating it has been selected for transmission
4) To de-select a particular estimate, click on it
5) To edit the cover e-mail for a particular estimate, highlight the estimate then click Edit E-mail
6) Click Send Now to transmit the e-mail, QuickBooks will check for an internet connection.