



Estimates

An **Estimate** provides a ballpark figure for how much it would cost to provide the services asked for in a Request. Once a request is approved, the estimate can be created for the request. Based on the estimate, the contact can decide whether to proceed with the service request or not. The estimate can either be accepted or rejected.



Available in Editions: **All Editions**

Add Estimates

Permission Required: [Estimates](#)

To create an estimate:

1. An estimate can be created in one of two ways:
 - a. Select the **Requests** module from the **Work Order Management** menu and click the request you want to create the estimate for. In the *Request Details* page, click **Convert to Estimate**.
 - b. Select the **Estimates** module from the **Work Order Management** menu and click **Create**. Perform this step if you are creating an estimate from scratch (without a request).
2. Enter the following details and click **Save**:
 - a. A **Summary** of the estimate
 - b. An **Expiry Date** until which the estimate will be valid
 - c. Select a **Currency**.

The Currency and Exchange Rate will be displayed only if [multiple currencies](#) are enabled.
 - d. The **Contact** whom the estimate is being created
 - e. The **Company** the contact belongs to
 - f. The **Email** address of the contact.

If there is no email address associated with the contact, the email address of the company (if present) will be used.
 - g. The **Phone** number of the contact
 - h. An **Asset**

An Asset is added when the service is for a product that you have sold.

Create Estimate
✕

Estimate Details

Summary

Expiry Date

Currency

Exchange Rate

Contact Details

Company

Contact

Email

Phone

Asset Details

Asset

Address

Cancel Save

i. The **Territory** in which the contact is located

j. A **Service Address**

This is the address where the service needs to be carried out. The service address present for the Asset, Company, or Contact will be used, in this order of preference. You can choose any other available address or click **Create New**.

Upon clicking **Create New**, the *Add Address* overlay will be displayed. To add a new address, enter the details and click **Save**. You can either choose to add an address to the Company/Contact or create a Single Use Address. The Single Use Address can be used only in the current Estimate record.

k. A **Billing Address**

l. Entries for **Services**

These denote the services that have to be delivered for the request for which the estimate is being created. The Services added in **Services And Parts** module will be listed here.

Select a Tax Rate or choose non-taxable by providing a reason. Click [here](#) to find details about setting the tax rates. Enter a percentage for the discount you wish to offer or a discount amount.

Create Estimate ✕

Address

Territory ✕

Service Address

Service Address
 1001 Basin Rd,
 Juneau, Alaska, 99801,
 United States
Tax : Salestax(5%)

✕

Copy Billing Address

Address linked to Contact

Billing Address

Billing Address
 113 5th Street Stairs,
 Juneau, Alaska, 99801,
 United States
Tax : Salestax(5%)

✕

Copy Service Address

Address linked to Contact

Services Salestax (5%)

Service	Quantity	List Price	Tax Name	Line Item Amount
<div style="border: 1px solid #ccc; padding: 2px; display: inline-block; margin-bottom: 5px;">Painting - Exterior Ho </div> <div style="border: 1px solid #ccc; padding: 2px; display: inline-block; width: 150px;">Add a Description</div>	1	Hours ▾	50	Salestax [5%] ▾
				52.5

+ New Line

Cancel
Save

m. Add the **Parts** necessary for the service tasks.

For Service, select the Service task for which the Product has been added. Select a Tax Rate or choose non-taxable by providing a reason.

Create Estimate
✕

Parts

Part	Quantity	List Price	Tax Name	Line Item Amount
<div style="display: flex; align-items: center;"> Exterior Primer - 4Ltr 📦 </div> <div style="border: 1px solid #ccc; padding: 2px; margin-top: 5px; width: 80%;">Add a Description</div> <div style="margin-top: 5px; color: #008000; font-size: 0.9em;">Painting - Exterior House ✎</div>	1	Pack ▾	75.25	Salestax [5%] ▾ 79.01 ⊖
<div style="display: flex; align-items: center;"> Texture Roller with H& 📦 </div> <div style="border: 1px solid #ccc; padding: 2px; margin-top: 5px; width: 80%;">Add a Description</div> <div style="margin-top: 5px; color: #008000; font-size: 0.9em;">Painting - Exterior House ✎</div>	1	Each ▾	25	Salestax [5%] ▾ 26.25 ⊖

+ New Line

	Sub Total	150.25
	Tax Amount	7.51
	Discount	0 \$ ▾
	Adjustment	0
	Grand Total	157.76

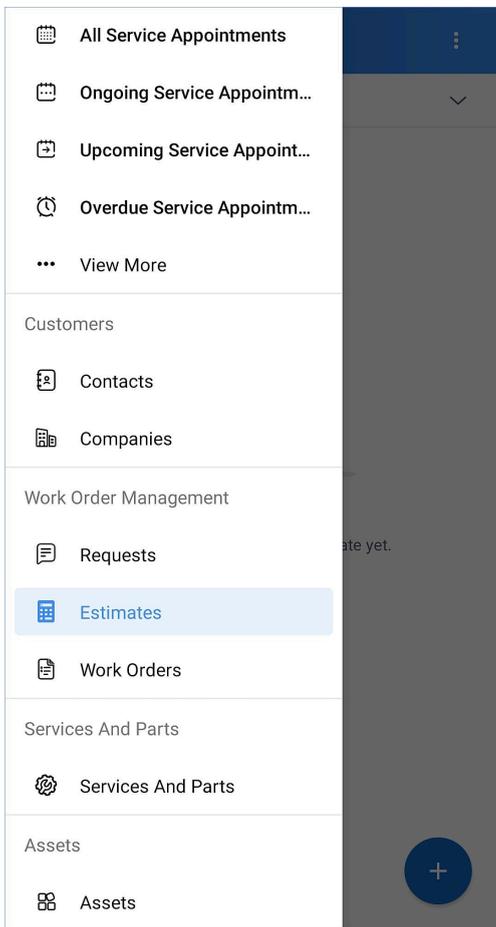
Cancel
Save

The estimate amount can be viewed in the *Estimate Details* page under the **Service and Parts** tab.

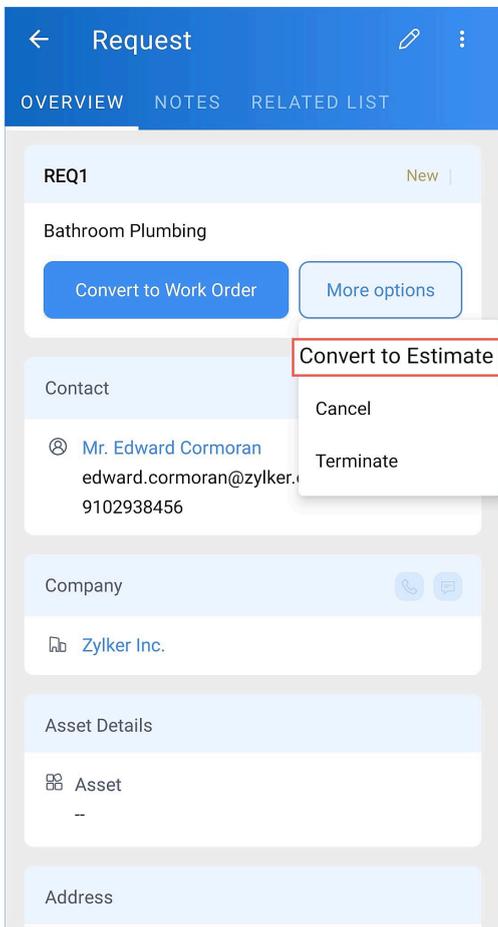
Add Estimates from Mobile App

To create an estimate from the mobile app:

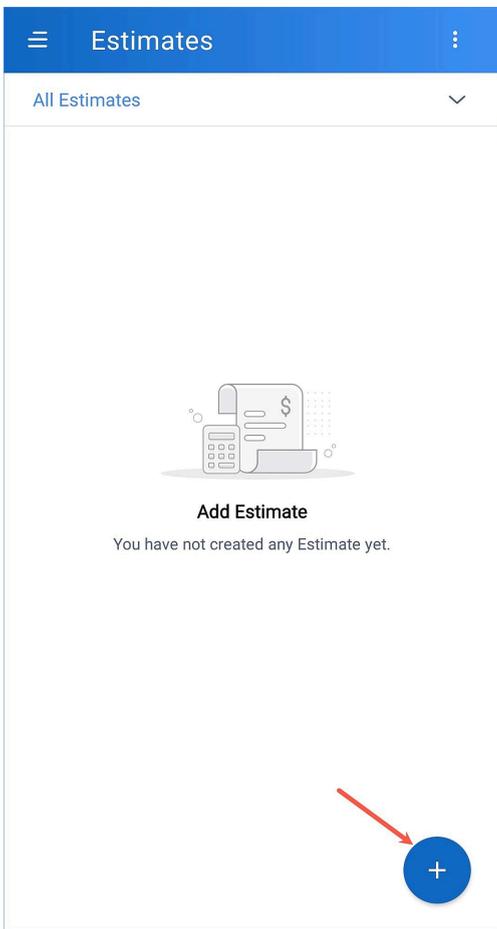
1. Select **Estimates**, in the left menu.



You can also create an estimate by using the **Convert to Estimate** in a request.



2. In the *Estimates* screen, tap the add [+] icon.



3. In the *Create Estimate* page, enter the necessary details and click **Save**.

← Create Estimate
Save

Estimate Details

* Summary	Home Refurbishment
Expiry Date	28 Apr 2023

Contact Details

Company	Zylker Inc. >
* Contact	Mr. Edward Cormoran >
* Email	edward.cormoran@zylker.com
Phone	333-333-3333

Asset Details

Asset	>
Scan QR/Barcode	

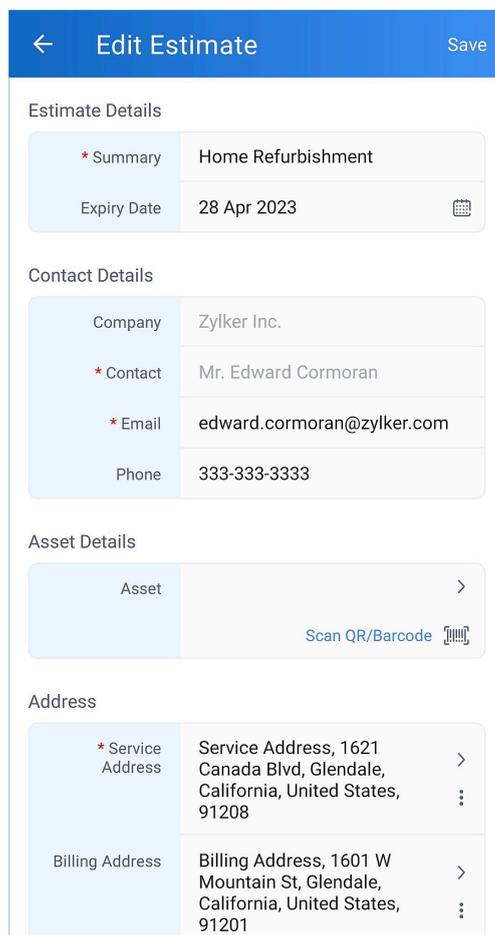
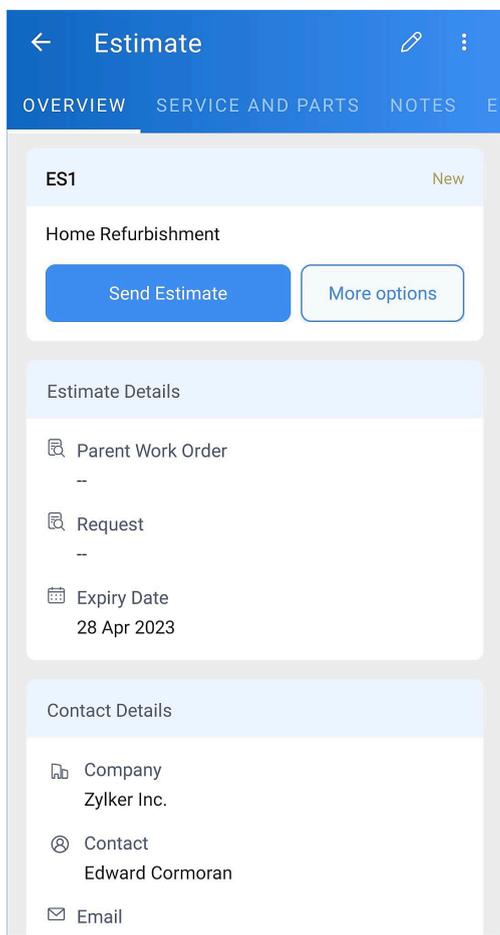
Address

* Service Address	Service Address, 1621 Canada Blvd, Glendale, California, United States, 91208 >
Billing Address	Billing Address, 1601 W Mountain St, Glendale, California, United States, 91201 >

4. In the lookup fields, you can do an [advanced search](#).
5. In the address fields, you can [add](#) addresses.
6. The Currency and Exchange Rate will be displayed only if [multiple currencies](#) are enabled.

The created estimate can be edited. To edit an estimate:

1. Click the **Edit** icon on the top right side.
2. Make the necessary changes and click **Save**.



You can also add notes, and view the related records.

Edit Estimate

To edit estimates:

1. Select **Estimates** from the **Work Order Management** menu.
2. Click the estimate you want to edit. In the *Estimate details* page, click **Edit**.
3. Click **Save** after making the changes.

NOTE: If an estimate is in Rejected, Cancelled, or Expired status, while editing you will have options to retain the estimate status, and include the approval link. Refer to the [Edit & Resend](#) section for details.

Send Estimate

Once the estimate is created, it can be emailed to the contact. To do so, follow the steps below:

1. In the *Estimate Details* page, click **Send Estimate**.
2. In the *Send Estimate* overlay, click **Send**.

By default, the checkbox for **Add Estimate PDF** will be selected. If you do not wish to include the estimate PDF in the estimate email, deselect it. By default, the Standard [PDF template](#) will be selected. To change

the template, click on the button next to the **Add Estimate PDF** checkbox. In the *Preview Estimate* overlay, select the desired template from the Template dropdown at the top right corner and click **Save**. To rename the estimate PDF, click on its name and enter a new value.

In the **From** field, choose a [sender email address](#).

In the **Send To** field, you can use one of the following email addresses:

- Contact email address (if only a contact is present for the estimate)
- Company email address (if a company is present for the estimate)
- Email addresses of the Company's Contacts (if a company is present for the estimate)
- An email address entered by the user in the **Email** field of the estimate

In the Cc and Bcc fields, along with the email addresses available in the **Send To** field, all active confirmed users will also be listed. To include any other email address, just type in the value and press **Enter**. In each of these fields, you can include a maximum of five email addresses.

Send Estimate

From: [Dropdown]

Send To: Bcc Cc ⓘ

Subject: Estimate - ES10 from Zylker

Template: Standard ...

Hello Team,

Thank you for contacting us. Kindly check out the estimate and do the required action.



Zylker Estimate ES10

Service Address
Lucy Robins
Acme Inc
Service Address,
1001 Basin Rd,
Juneau, Alaska, 99801,
United States

Summary :
Home Refurbishment

Add Estimate PDF

Cancel Send

If there are no [sender email](#) addresses, then the estimate will be sent from noreply@sender.zohofsm.com.

Send Estimate

From: To customize sender address, go to [Sender Email\(s\)](#).

Send To: Bcc Cc ⓘ

Subject:

Template:

Hello Team,

Thank you for contacting us. Kindly check out the estimate and do the required action.

 **Zylker** Estimate ES10

Service Address
Lucy Robins
Acme Inc
Service Address,
1001 Basin Rd,
Juneau, Alaska, 99801,
United States

Summary :

Add Estimate PDF

The customer will receive an email with the estimate details and the options to accept or reject it. The options to accept or reject will be available only on enabling [Estimate - Email Approval](#).



Lucy Robins
to me

Dear Lucy Robins ,

Thank You for contacting us. Kindly check out the estimate and do the required action.



Zylker

Estimate ES12

Service Address

Lucy Robins
Acme Inc
Service Address,
1001 Basin Rd,
Juneau, Alaska, 99801,
United States

Service & Part Name	Quantity	Price (\$)	Tax	Total (\$)
Painting - Exterior House	1	50	Salestax (5.0%)	52.5
Exterior Primer - 4Ltr (White)	1	75.25	Salestax (5.0%)	79.01
Texture Roller with Handle for Wall Decor, 7-inch	1	25	Salestax (5.0%)	26.25

Sub Total	\$ 150.25
Tax Amount	\$ 7.51
Discount	\$ 0
Adjustment	\$ 0
Grand Total	\$ 157.76

Regards,
Lilly Rush
Zylker

Once the estimate is accepted by the contact, then a work order can be created with the information in the estimate. Refer to [this](#) section for mapping details. Any requests and work orders created for this estimate will be displayed in the *Estimate Details* page.

You can use **Mark as Sent**, or **Mark as Approved** to change the status of the estimate manually. When an estimate is shared with the customer through any means other than via the FSM application, then Mark as Sent can be used to change the status of the estimate to Waiting for Approval. Similarly, if you want to manually change the status of the estimate to Approved, then use Mark as Approved.

The screenshot shows the Zoho FSM web interface for an estimate titled 'ES10' under 'Home Refurbishment'. The estimate is owned by 'Lilly Rush' and expires on 'May 12, 2023'. The 'Services and parts' tab is active, displaying a table with one service line item: 'SVC-114 Exterior Wall Painting' with a quantity of '1 Hours' and a list price of '\$ 58.00'. A dropdown menu for 'Send Estimate' is open, showing options: 'Cancel', 'Mark as Sent', 'Mark as Approved', 'Download', and 'Print'. The 'Mark as Sent' and 'Mark as Approved' options are highlighted with a red box.

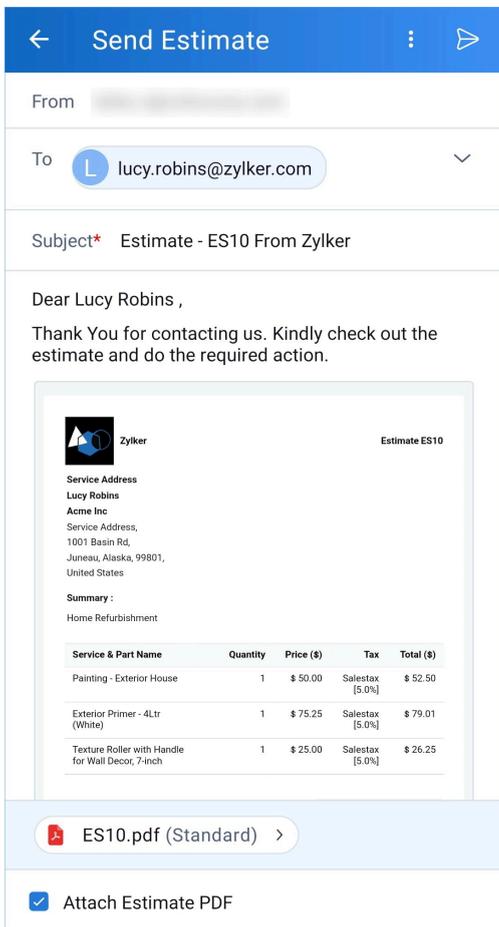
Send Estimate from Mobile App

To send an estimate:

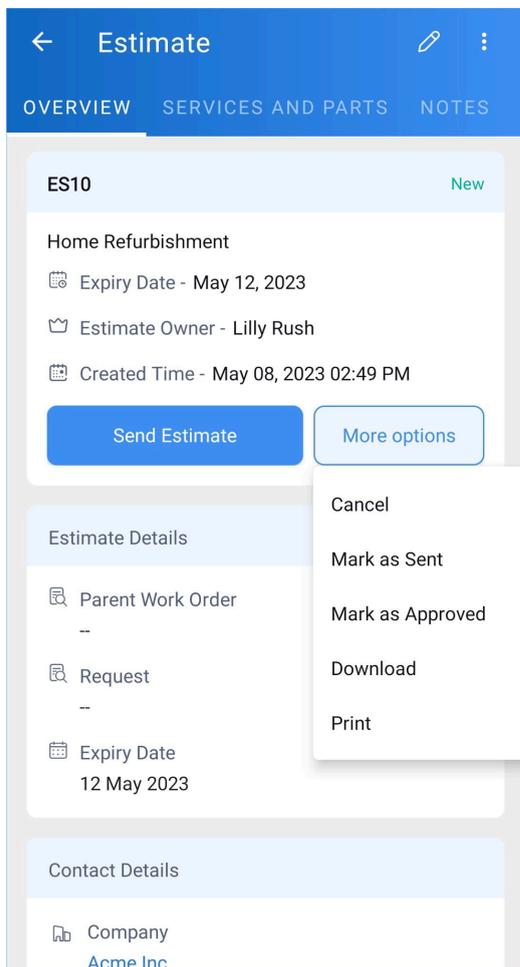
1. Tap **Send Estimate**.

The screenshot shows the Zoho FSM mobile app interface for an estimate titled 'Estimate'. The screen displays the estimate details for 'ES10', which is 'New'. The estimate is for 'Home Refurbishment' and expires on 'May 12, 2023'. The estimate owner is 'Lilly Rush' and it was created on 'May 08, 2023 02:49 PM'. There are two buttons: 'Send Estimate' and 'More options'. Below the buttons, there are sections for 'Estimate Details' and 'Contact Details'. The 'Estimate Details' section shows 'Parent Work Order' as '--', 'Request' as '--', and 'Expiry Date' as '12 May 2023'. The 'Contact Details' section shows 'Company' as 'Acme Inc'.

2. Select a recipient and tap **Send** [➤].



Tap **More options** for the actions you can perform on the estimate.



Invalidated Status

After the estimate is emailed, if an FSM user performs any of the following actions, then the Accept/Reject link in the email will expire and the [status](#) of the email will change to **Invalidated**:

- Edit the estimate
- Resend the estimate
- Mark the estimate as expired
- Cancel the estimate
- Approve the estimate
- Reject the estimate

You can also manually invalidate an email when the status of the email is in **Pending** status. To do so:

1. Hover over the email entry you want to invalidate. Click the **more options** [:] icon and select **Invalidate**.

Subject	Sender	Sent To	Sent On	Email Owner	Status
Estimate - ES6 from Zylker	[redacted]	lucy.robins@zylker.com	Apr 30, 2024 03:10 PM	Lilly Rush	Pending
Estimate - ES6 from Zylker	[redacted]	lucy.robins@zylker.com	Apr 24, 2024 04:44 PM	Lilly Rush	Invalidate
Estimate - ES6 from Zylker	[redacted]	lucy.robins@zylker.com	Mar 10, 2023 03:42 PM	Lilly Rush	Invalidated
Estimate - ES6 from Zylker	[redacted]	lucy.robins@zylker.com	Mar 10, 2023 03:41 PM	Lilly Rush	None

Resend Estimate

If an estimate has been rejected, cancelled, or has expired, then you can resend the estimate. You can resend the estimate in three different ways:

- [Resend](#)
- [Edit & Resend](#)
- [Clone & Resend](#)

Resend

You can resend the estimate (without changes) with or without the approval link. The option **Add approval link** will only be available if the **Estimate - Email Approval** is enabled at **Setup > Field Service Settings > Other Settings**.

1. Click **Resend** and click **Proceed**.



Resend Estimate

Since the current estimate is expired, how would you like to resend it?

Resend

Resend estimate without making any modifications

Add approval link

Edit & Resend

Make modifications to the estimate before resending it.

Clone & Resend

Create a copy of the estimate and send it.

Cancel

Proceed

2. Click **Send**.

If you select the **Add approval link** checkbox, then it will be checked in the *Send Estimate* overlay. If this checkbox is selected, then the estimate email will contain the Accept/Reject link.

Send Estimate ✕

From:

Send To: Cc Bcc ⓘ

Subject:

Customize ⚙️

Hello Lucy Robins,

Thank You for contacting us. Kindly check out the estimate and do the required action .

Zylker

Service Address

Lucy Robins
Acme Inc
Service Address,
1001 Basin Rd,
Juneau, Alaska, 99801,
United States

Estimate ES6

Service & Part Name	Quantity	Price (\$)	Tax	Total (\$)
<input checked="" type="checkbox"/> Add Estimate PDF				
<input checked="" type="checkbox"/> Add approval link				

Cancel
Send

If you try to send the estimate without the approval link, then you will encounter the below confirmation message.

Send without approval link?

Do you want to send the estimate email without the approval link?

Cancel
Send

Edit & Resend

You can resend the estimate after making changes.

1. Click **Edit & Resend** and click **Proceed**.



Resend Estimate

Since the current estimate is expired, how would you like to resend it?

Resend

Resend estimate without making any modifications

Edit & Resend

Make modifications to the estimate before resending it.

Clone & Resend

Create a copy of the estimate and send it.

Cancel

Proceed

2. In the *Edit Estimate* overlay, click **Save** or **Save and Send**.

- If you select the checkbox **Keep the status as [Status_Name]**, you can retain the status (rejected, cancelled, expired) of the estimate. Click **Yes, Proceed** in the confirmation message. The changes made to the estimate will be saved.
- If you do not select the checkbox **Keep the status as [Status_Name]**, the status of the estimate will change to **New**.

Edit Estimate
✕

Estimate Details

Summary

Expiry Date

Currency

Exchange Rate

Contact Details

Company

Contact

Email

Phone

Asset Details

Asset

Address

Territory

Service Address

Keep the status as Expired

3. In *Send Estimate* overlay, click **Send**.

- If you select the checkbox **Add approval link**, then the estimate email will be sent with the approval link. The estimate status will change to **Waiting For Approval**. The status of the email will be **Pending**. The Add approval link checkbox will be shown only if had selected the checked **Keep the status as [Status_Name]** in the previous step.
- If you do not select the checkbox **Add approval link**, then the estimate email will be sent without the approval link. The status of the estimate will remain unchanged. The status of the email will be **None**.
- If the checkbox **Keep the status as [Status_Name]** was not selected in the previous step, then the estimate status will change to **Waiting For Approval** (since it was in **New** in the previous step). The status of the email will be **Pending**.

Send Estimate ✕

From:

Send To: Cc Bcc ⓘ

Subject:

Customize ⚙️

Hello Lucy Robins,

Thank You for contacting us. Kindly check out the estimate and do the required action .



Zylker

Estimate ES6

Service Address

Lucy Robins
Acme Inc
Service Address,
1001 Basin Rd,
Juneau, Alaska, 99801,
United States

Service & Part Name	Quantity	Price (\$)	Tax	Total (\$)
<input checked="" type="checkbox"/> Add Estimate PDF				

Add approval link

Cancel
Send

Clone & Resend

You can create a copy of the estimate and send it.

1. Click **Clone & Resend** and click **Proceed**.



Resend Estimate

Since the current estimate is expired, how would you like to resend it?

- Resend**
Resend estimate without making any modifications
- Edit & Resend**
Make modifications to the estimate before resending it.
- Clone & Resend**
Create a copy of the estimate and send it.

Cancel

Proceed

2. In *Clone Estimate* overlay, click **Save**.

Clone Estimate

Estimate Details

Summary: Home Refurbishment

Expiry Date: Mar 16, 2023

Currency: USD

Exchange Rate: 1

Contact Details

Company: Acme Inc

Contact: Lucy Robins

Email: lucy.robins@zylker.com

Phone: 111-111-1111

Asset Details

Asset: Search Asset

Address

Territory:

Cancel Save

A copy of the estimate will be created with status **New**.

Print Estimate

Once you have sent an estimate, you can print the estimate. To print an estimate:

1. From the dropdown button, click **Print**.

The screenshot shows the Zylker FSM interface for estimate ES12. The estimate is titled 'Home Refurbishment' and is in an 'Approved' status. A dropdown menu is open from the 'Convert To Work Order' button, with the 'Print' option highlighted in red. The 'Services and parts' tab is selected, showing a table with one service line item: 'SVC-47 Exterior Wall Painting' with a quantity of 1, a list price of \$50.00, and a line item amount of \$52.50. The 'Parts' section is also visible but empty.

Service Line Item Name	Service	Quantity	List Price	Tax Name	Line Item Amount
SVC-47	Exterior Wall Painting	1 Hours	\$ 50.00	Salestax [5%]	\$ 52.50

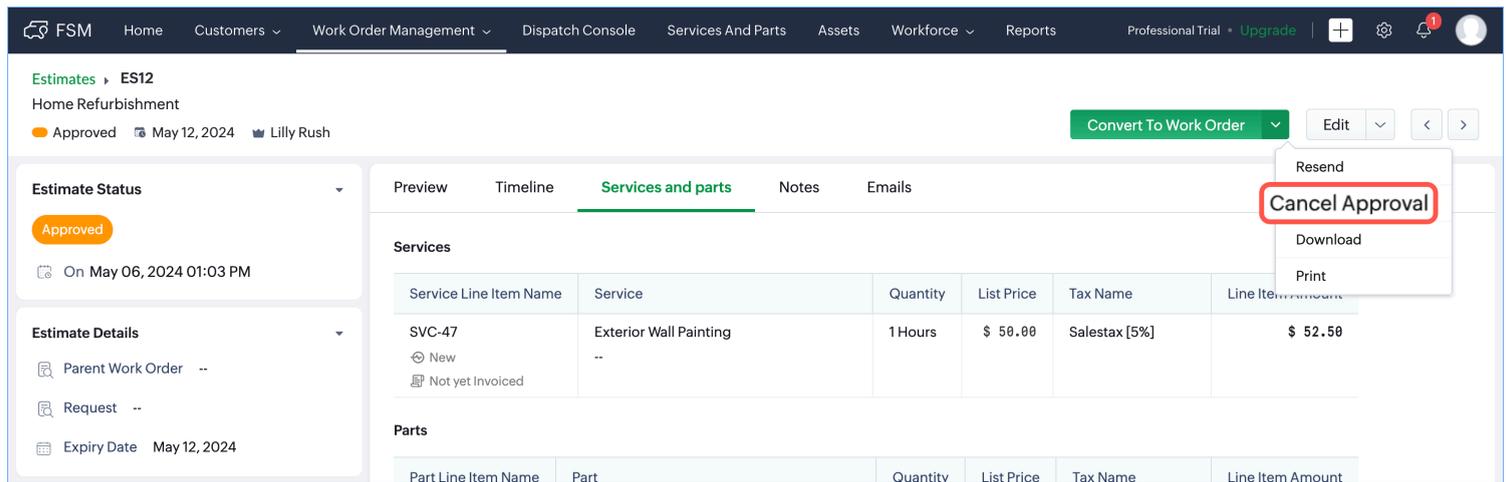
2. Click **Print**.

The 'Print Estimate' dialog box displays the Zylker logo and the estimate title 'Estimate ES12'. The service address is listed as 'Lucy Robins, Acme Inc, 1001 Basin Rd, Juneau, Alaska, 99801, United States'. A table lists the services and parts with their respective quantities, prices, taxes, and totals.

Service & Part Name	Quantity	Price (\$)	Tax	Total (\$)
Painting - Exterior House	1	50	Salestax [5.0%]	52.5
Exterior Primer - 4Ltr (White)	1	75.25	Salestax [5.0%]	79.01
Texture Roller with Handle for Wall Decor, 7-inch	1	25	Salestax [5.0%]	26.25

Cancel Approval

You can roll back the Approved status of an estimate. In the *Estimate Details* page, select **Cancel Approval**.



The screenshot shows the Zoho FSM interface for an estimate. The top navigation bar includes 'FSM', 'Home', 'Customers', 'Work Order Management', 'Dispatch Console', 'Services And Parts', 'Assets', 'Workforce', 'Reports', and 'Professional Trial'. The main content area is titled 'Estimates > ES12' and 'Home Refurbishment'. The estimate status is 'Approved' with a date of 'May 12, 2024' and assigned to 'Lilly Rush'. A 'Convert To Work Order' button is visible. A dropdown menu is open, showing options: 'Resend', 'Cancel Approval' (highlighted with a red box), 'Download', and 'Print'. The 'Services and parts' tab is active, displaying a table with one service line item: 'SVC-47 Exterior Wall Painting' with a quantity of 1, a list price of \$ 50.00, and a line item amount of \$ 52.50. Below the services table, there is a 'Parts' section with a table header.

Service Line Item Name	Service	Quantity	List Price	Tax Name	Line Item Amount
SVC-47	Exterior Wall Painting	1 Hours	\$ 50.00	Salestax [5%]	\$ 52.50

Part Line Item Name	Part	Quantity	List Price	Tax Name	Line Item Amount
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Once you cancel the approval of an estimate, the status of the estimate will change to New. Refer to [this](#) table to know about the permission required to perform this action.

Customize Estimate Email Template

You can customize the template you use to email the estimate. To do so, follow the steps below:

1. In the *Estimate Details* page, click **Send Estimate**.
2. In the *Send Estimate* overlay, click the **Template** dropdown and choose one of the following options:
 - a. **Standard Old**: This is the older version of the standard template. Gradually, support for this template will be withdrawn.
 - b. **Standard Template**: The default template will be used.
 - c. **Custom Template**: The [email templates](#) that you have created for the **Estimates** module will be listed here. The placeholders in the email template will be replaced with actual values.
 - d. **Compose your own**: Using the text editor you can create a template for this estimate. This template, however, will not be saved for future use.

Send Estimate ✕

From:

Send To: Bcc Cc ⓘ

Subject:

Template: Standard ... ▼

Hello Team,

Thank you for contacting us. Kindly check out the estimate and do the required action.



Zylker

Service Address
 Lucy Robins
 Acme Inc
 Service Address,
 1001 Basin Rd,
 Juneau, Alaska, 99801,
 United States

Summary :
 Home Refurbishment

Estimate ES10

- Standard Old
- Standard
- Acme Inc. Estimates
- Compose your own

Add Estimate PDF ES10.pdf (Standard) >

Cancel
Send

In the mobile app, click on the **More Options** [⋮] icon in the *Send Estimate* screen to view the templates available. The user can either choose the Standard template or any [email template](#) created for the **Estimates** module. Old Standard Template is the older version of the standard template.

Send Estimate

From [Redacted] Old Standard Template

To lucy.robins@acmeinc.com Standard
Acme Inc. Estimates

Subject* Estimate - ES10 From Zylker

Dear Lucy Robins ,

Thank You for contacting us. Kindly check out the estimate and do the required action.

Zylker Estimate ES10

Service Address
Lucy Robins
Acme Inc
 Service Address,
 1001 Basin Rd,
 Juneau, Alaska, 99801,
 United States

Summary :
 Home Refurbishment

Service & Part Name	Quantity	Price (\$)	Tax	Total (\$)
Painting - Exterior House	1	\$ 50.00	Salestax [5.0%]	\$ 52.50
Exterior Primer - 4Ltr (White)	1	\$ 75.25	Salestax [5.0%]	\$ 79.01
Texture Roller with Handle for Wall Decor, 7-inch	1	\$ 25.00	Salestax [5.0%]	\$ 26.25

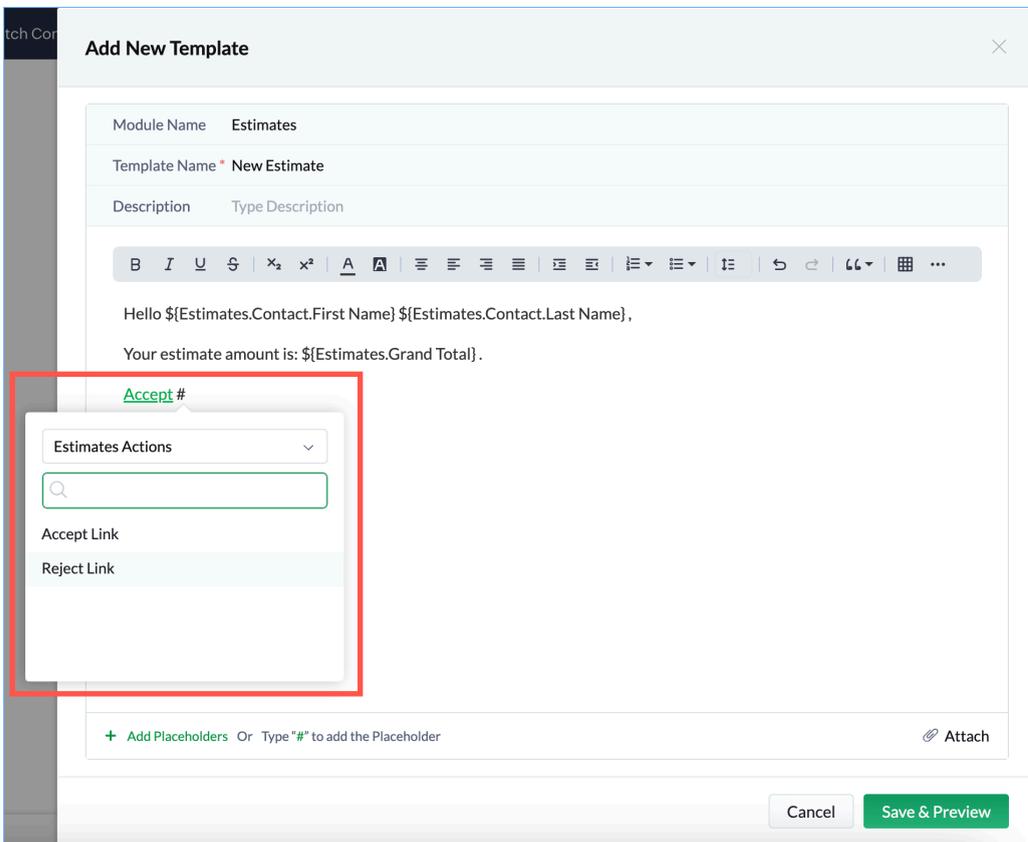
ES10.pdf (Standard) >

Attach Estimate PDF

Adding Accept/Reject Links

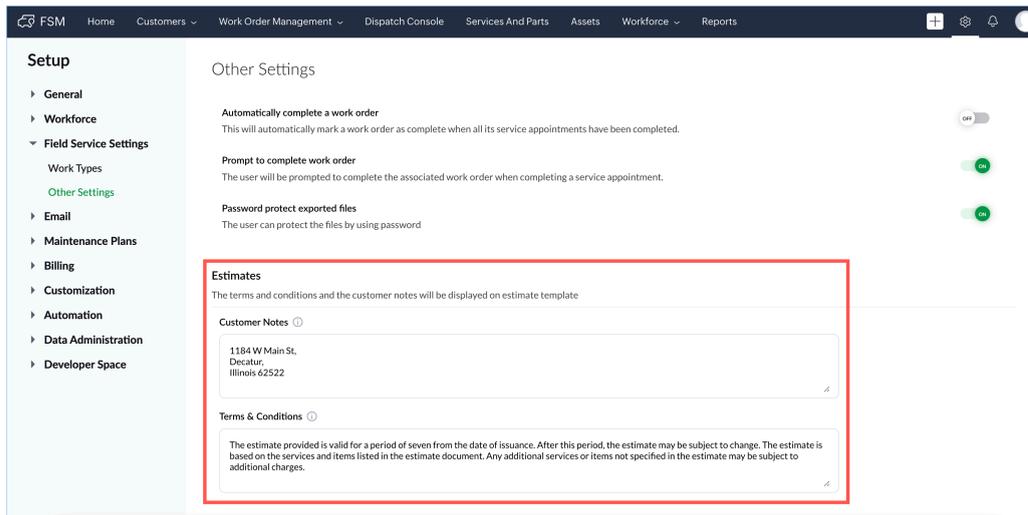
You can add links for Accept/Reject in a custom template (created using an email template or by using the text editor in the *Send Estimate* overlay).

In an [email template](#), click **Add Placeholders** or type # and select **Estimates Actions**. Add the necessary placeholders.

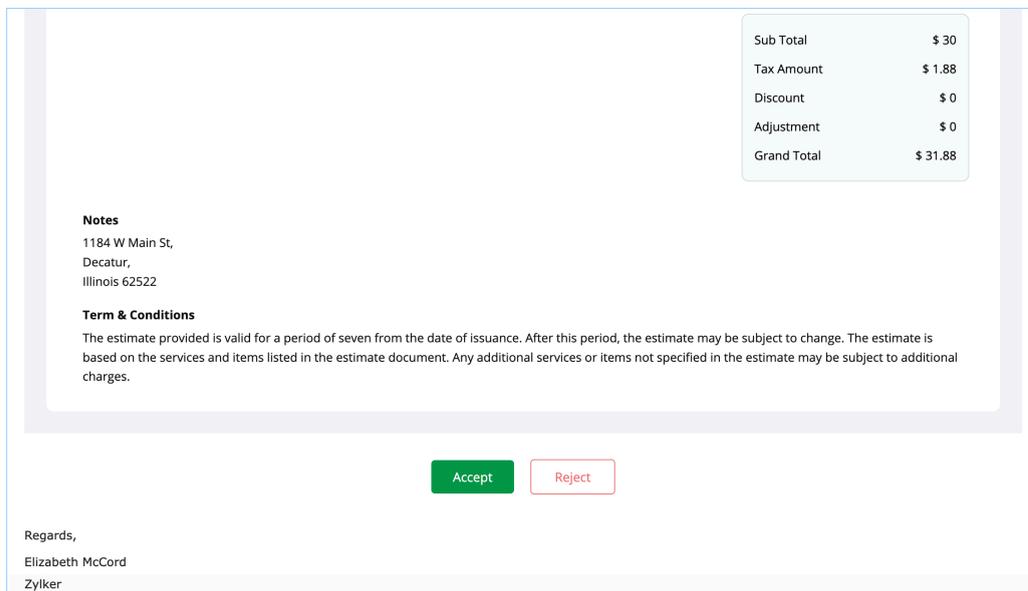


While composing your email template from the *Send Estimate* overlay, click on **+Add Placeholders** and select the required options.

can overwrite the set value of Terms & Conditions for an individual estimate while [creating](#) or [editing](#) it.



These two sections will be added at the bottom of the Estimate Email if you use the [Standard Old](#) template while emailing the estimate.



Preview tab

Under this tab, you will find all the actions for the Estimate's PDF template present at the same place. From this tab, you can perform the following actions on the estimate PDF template you select from the dropdown:

- **Download**
- **Print**
- **Terms & Conditions:** In the *Update Terms And Conditions* popup, the **Terms & Conditions** present at **Setup > Field Service Settings > Other Settings > Estimates** will be shown. Make any changes, if necessary, and click **Save**. If you select the checkbox **Use this for every customer's future estimates**, the updated terms and conditions will be used for the estimate in question and all estimates created after that. The changes to the terms and conditions will also be updated in the **Terms & Conditions** at **Setup > Field Service Settings > Other Settings > Estimates**. However, if you don't select the checkbox, the updated

terms and conditions will only reflect in the estimate in question. At any point, if the **Terms & Conditions** present at **Setup > Field Service Settings > Other Settings > Estimates** is modified, then this updated terms and conditions will be used in the estimates created thereafter.

- **Update Logo:** If you need to use a different organization logo, in the *Upload Image* popup, click **Choose File to Upload**, choose an image, and click **Upload**. This updated logo will also reflect in the [Organization Profile](#) (**Setup > General > Organization Details**).
- **Edit Template:** Use this option to [edit](#) the chosen custom PDF template.

Estimate Details

- Parent Work Order --
- Request --
- Expiry Date --

Contact Details

- Company --
- Contact **Amy Santiago**
- Email amy.santiago@noemail.com
- Phone 444-444-4444
- Mobile 8291038475

Asset Details

- Asset --

Address

- Territory Alaska
- Service Address

ES20

Standard

- Download
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Zylker

Service Address
Amy Santiago
47 W 13th St
New York
New York
10011
USA

Billing Address
Amy Santiag
620 Atlantic Ave
Brooklyn
New York
11217
United States

Summary
Home painting for the Santiago residence

Service & Part	Quantity	List Price	Tax	Line Item Amount
Exterior Wall Painting	1	\$ 50.00	Salestax [5.0%]	\$ 52.50
Interior Wall Painting	1	\$ 50.00	Salestax [5.0%]	\$ 52.50
Exterior Primer - 4Ltr (White)	1	\$ 75.25	Salestax [5.0%]	\$ 79.01
Exterior Primer - 4Ltr (White)	1	\$ 75.25	Salestax [5.0%]	\$ 79.01

Emails tab

Under this tab, the details of the emails sent will be listed.

The screenshot displays the FSM software interface for an estimate. The top navigation bar includes 'FSM', 'Home', 'Customers', 'Work Order Management', 'Dispatch Console', 'Services And Parts', 'Assets', 'Workforce', and 'Standard Trial Upgrade'. The main header shows 'Estimates > ES6' and 'Home Refurbishment'. The estimate status is 'Waiting For Approval' with a yellow badge, and it is set to expire in 6 days on Mar 16, 2023, assigned to Lilly Rush. The left sidebar contains sections for 'Estimate Status', 'Estimate Details' (including Parent Work Order, Request, Expiry Date, Currency, and Exchange Rate), and 'Contact Details' (Company: Acme Inc, Contact: Lucy Robins, Email: lucy.robins@zylker.com). The main content area shows a tabbed interface with 'Emails' selected, displaying a table of sent emails:

Subject	Sender	Sent To	Sent On	Email Owner	Status
Estimate - ES6 from Zylker	[Redacted]	lucy.robins@zylker.com	Mar 10, 2023 02:12 AM (GMT -...)	Lilly Rush	Pending
Estimate - ES6 from Zylker	[Redacted]	lucy.robins@zylker.com	Mar 10, 2023 02:11 AM (GMT -...)	Lilly Rush	Invalidate

Statuses

List of Estimate statuses

Status	Description
New	<ul style="list-style-type: none"> - When an estimate is created - When the estimate's Approved status is cancelled.
Approved	<ul style="list-style-type: none"> - When the estimate is approved by the contact from the estimate email - When the estimate is approved by a FSM user from the <i>Estimate Details</i> page. - When a FSM user chooses Mark as Approved from the <i>Estimate Details</i> page.
Rejected	<ul style="list-style-type: none"> - When the estimate is rejected by the contact from the estimate email - When the estimate is rejected by a FSM user from the <i>Estimate Details</i> page.
Cancelled	When the estimate is cancelled by a FSM user from the <i>Estimate Details</i> page.
Waiting For Approval	<ul style="list-style-type: none"> - When the estimate email is emailed to the contact - When a FSM user chooses Mark as Sent from the <i>Estimate Details</i> page.

Converted to Work Order	When a FSM user chooses Convert To Work Order from the <i>Estimate Details</i> page.
Expired	<ul style="list-style-type: none"> - When the FSM user chooses Mark As Expired from the <i>Estimate Details</i> page. - On the Expiry Date provided by the FSM user. - If the Expiry Date is not provided by the FSM user, seven days after the estimate is created.

List of Email statuses

Status	Description
None	<ul style="list-style-type: none"> - When you resend the estimate when it is in Approved or Converted to Work Order status - If Estimate - Email Approval setting is disabled at Setup > Field Service Settings > Other Settings. - If approval link is not included in the estimate email
Pending	When the estimate email is sent
Invalidated	<p>When the approval link is no longer valid or has expired.</p> <p>If an FSM user does any of the following actions, the accept/reject link in the email will expire:</p> <ul style="list-style-type: none"> • Edit the estimate • Resend the estimate • Mark the estimate as expired • Cancel the estimate • Approve the estimate • Reject the estimate
Approved	When the estimate is accepted by the user by clicking Accept in the estimate email.
Rejected	When the estimate is rejected by the user by clicking Reject in the estimate email.

Permissions

Following are specific permissions under Estimates that are required to perform certain actions:

Action	Permission Required
Invalidate	Estimate Edit

Edit & Resend	Estimate Edit, Send Estimate
Resend	Send Estimate
Clone & Resend	Estimate Create, Send Estimate
Cancel Approval	Cancel Approval

FSM Home Customers Work Order Management Dispatch Console Services And Parts Assets Workforce Reports Professional Trial Upgrade

Profile - Administrator Save Cancel

customize permissions.

Basic Permissions

Category	Item	Status	Scope	Actions
General Permissions	Contacts	<input checked="" type="checkbox"/>	All Records	View,Create,Edit,Delete,Ch...
Field Service Operations	Companies	<input checked="" type="checkbox"/>	All Records	View,Create,Edit,Delete,Ch...
Work Force Management	Requests	<input checked="" type="checkbox"/>	All Records	View,Create,Edit,Delete,Ch...
Admin Permissions	Estimates	<input checked="" type="checkbox"/>	All Records	View,Create,Edit,Delete,Ch...
Manage Automations	Work Orders	<input checked="" type="checkbox"/>	All Records	View,Create,Edit,Delete,Ch...
Bulk Actions	Service Appointments	<input checked="" type="checkbox"/>	All Records	View,Create,Edit,Delete,Ch...
Data Administration	Trips	<input checked="" type="checkbox"/>	All Records	View,Create,Edit,Delete,Ch...
Developer Permissions	Time Sheets	<input checked="" type="checkbox"/>	All Records	View,Create,Edit,Delete,Ch...
	Services And Parts	<input checked="" type="checkbox"/>	All Records	View,Create,Edit,Delete,Ch...
	Assets	<input checked="" type="checkbox"/>	All Records	View,Create,Edit,Delete,Ch...
	Crew	<input checked="" type="checkbox"/>	All Records	View,Create,Edit,Delete,Ch...
	Notes	<input checked="" type="checkbox"/>	All Records	View,Create,Edit,Delete,Ch...
	Attendance	<input checked="" type="checkbox"/>	All Records	View,Create,Edit,Delete,Ch...
	Invoices	<input checked="" type="checkbox"/>	All Records	View,Create,Edit,Delete,Ch...
	Reports	<input checked="" type="checkbox"/>	All Records	View,Create,Edit,Delete,Ch...
	Scheduled Maintenances	<input checked="" type="checkbox"/>	All Records	View,Create,Edit,Delete,Ch...

Dropdown menu for Estimates:

- View
- Create
- Edit
- Delete
- Change Owner
- Send Estimate
- Approve
- Reject
- Convert To Work Order
- Cancel
- Mark as Expired
- Mark as Sent
- Mark as Approved
- Cancel Approval
- Download
- Print