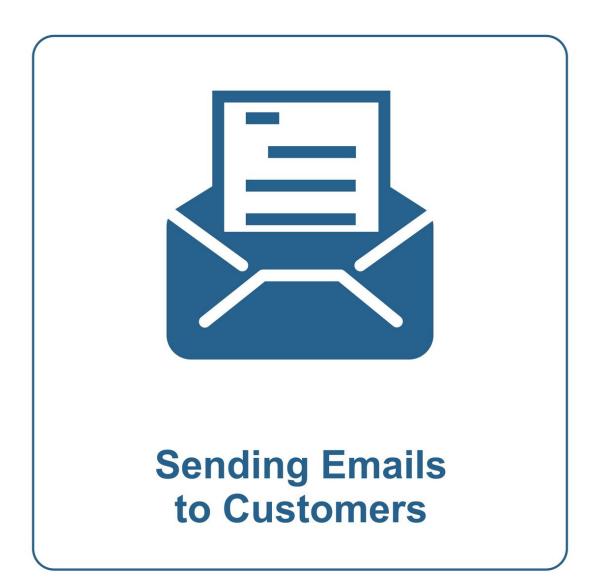


## Sending Emails to Customers Through an Estimate

The following guide illustrates how to send an email through an estimate or RO to the customer noted the ticket.

Written By: Jennifer Harding



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## Step 1 — Sending Emails to Customers Through an Estimate

hop Mgmt Omnie	que East 🗸	Quick Dig	New E Dally Ticket Report			Hello owner@armique +		
ARD	TICKET DETAILS COMMENTS	ATTACHMENTS 2 ERRORS 4 WARN	NGS 🚹		greements > Agreements ervice Tag	SMS Schedule		
MENTS	COMMENTS	ATTACHMENTS C ERRORS VARM	103 10					
IERS	Estimate 0-3903				Created: 04/08/	2019 🚳		
юк	CUSTOMER 0	VEHICLE Ø			FEES/COUPON			
	Sally Smith 1234 test lane	2003 Honda Accord LX	Appointment:	-	Parts	\$100.00		
ER	Englewood CO 80112 Phone Number(s)	1HGCM663334037160	Mileage: Market Source:	-/0	Labor	\$15.00		
		Vehicle History	Sub Market Source: Customer PO:		Subtotal	\$115.00		
RATION	(123) 456-7690 test@yahoo.com	QuickChart	Tax Exempt Number:	0000000	Coupons	\$0.00		
RATION	testigyation.com		Service Adv: Default Tech:	-	Misc. Charges 🗸	\$3.45		
RATION			Estimated Comp:	-	TOTAL	\$118.45		
HELP			Location: Pricing Level:	Default Pricing Level	Ticket Deposit Remaining	\$0.00 \$118.45		
			Ticket Type:	Customer Pay	Remaining	3110.40		
	PARTS & LABOR					SUBTOTAL: \$115.00		
_	Part #	Qty: 1	+ Q QuickParts -	QuickParts Ordering	d.			
<u>S</u>		DORS TECHS DISCOUNTSIC	OUPONS WARRANTY	COMMENTS	EXTRA	DECLINED		
rdustries logies	Bulk Actions							
scy Statement	Date Platenty			Destr. Labor	Other			

## Step 2 — Sending Emails to Customers Through an Estimate

DASHBOARD		ATTACHMENTS		Agreements > Agre 🚔 Print 💊 Service Tag 🚔 I	ements > Estimates > <u>Estimate  </u> Email 🔲 SMS 👿 Sched
APPOINTMENTS CUSTOMERS	Coments				x
TICKETS	Estimate 0-3903		Please select the c	customens email address below. Unity one email address sill cond	8/2019 🕥 …
TIMECLOCK	CUSTOMER 0	VEHICLE	Email:	tast@valion.com	
	Sally Smith	2003 Honda Accord LX			\$100.00
PARTSILABOR	1234 test lane Englewood CO 80112	1HGCM663X34037160	Subject:	Email Subject	\$15.00
REPORTS	Phone Number(s)	Vehicle History	Wessage:	Email Body	\$115.00
ADMINISTRATION	(123) 456-7890 test@yahoo.com	QuickChart			\$0.00
CONFIGURATION	tesigyanoccom				\$3.45
CONFIGURATION					\$118.45
다. LIVE HELP					- \$118.45
			Attachment:	Estimate 0-3903 🔒	
	PARTS & LABOR			Select Attachment	SUBTOTAL: \$115.00
	Part #	Qty: 1			
NIESED AN				Send Cancel	
•		ORS TECHS DISCO			DECLINED
and Technologies	Bulk Actions		-		
Use   Privacy Statement	Buik Actions				

- Enter the address under the **Email** field if one is not already populated.
- Enter a subject in the **Subject** field.
- Enter the email message in the Message field.
- Add attachments in the Attachments filed.
  - An attachment of the ticket itself will automatically be included in the email.
- Once all necessary information has been added, click **Send** to finish.

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