



Estimate Manager User Guide

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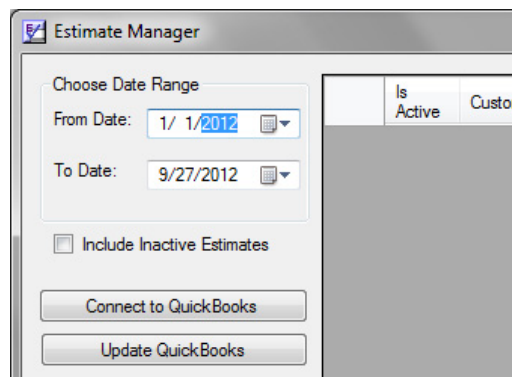
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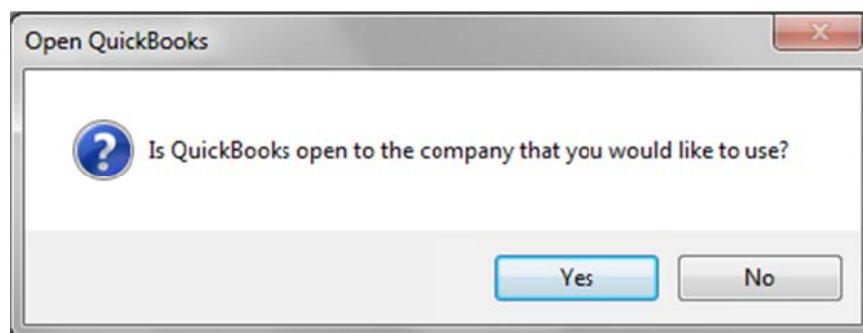
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Getting Started

1. Download the EstimateManager.zip file and install on the same computer where QuickBooks is installed. (See Installation Instructions)
2. Open QuickBooks, and open the company file that you want to use.
3. Start the Estimate Manager by double clicking the icon on the desktop or by going to Start-Programs- QB Utility – Estimate Manager
4. The Estimate Manager will open in a new window.
 - a. Enter a Date Range- only estimates in this Date Range will be retrieved from QuickBooks
 - b. Choose to Include Inactive Estimates- only Active Estimates will be retrieved from QuickBooks if this is not selected.
 - c. Click “Connect to QuickBooks”



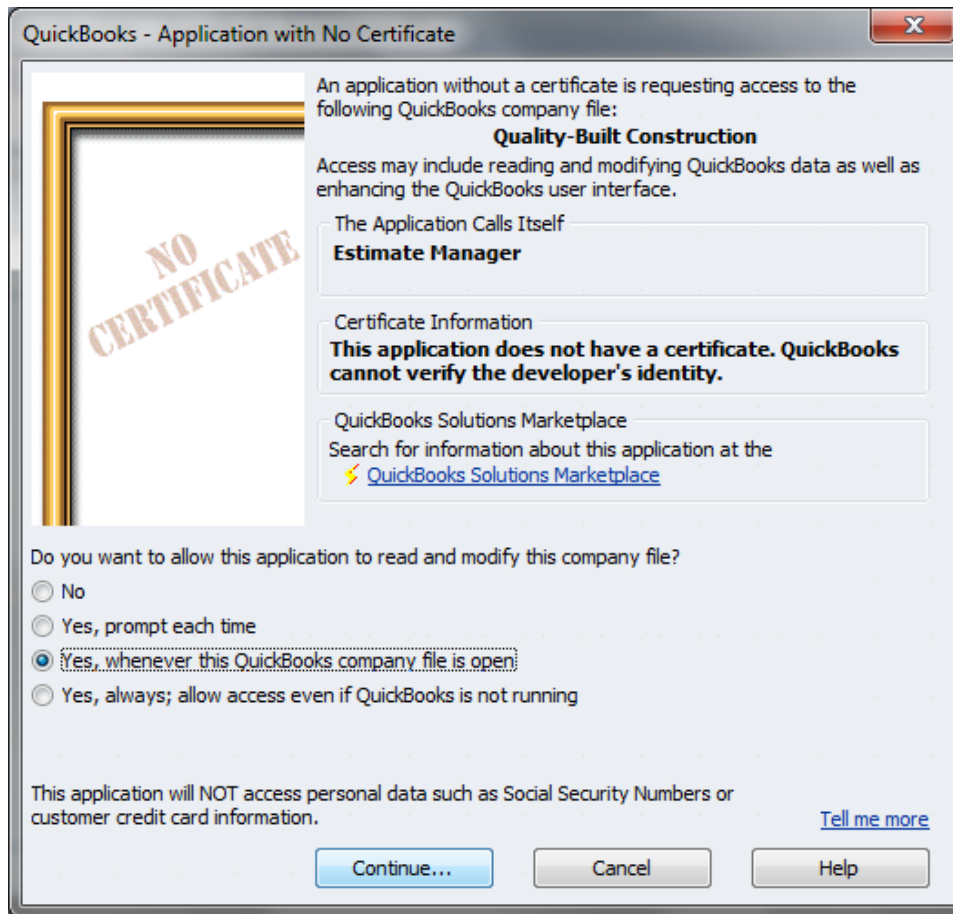
5. A window will appear asking if QB is open to the company that you would like to use. Ensure that QuickBooks is open on the company that you would like to work with, and then click “Yes”





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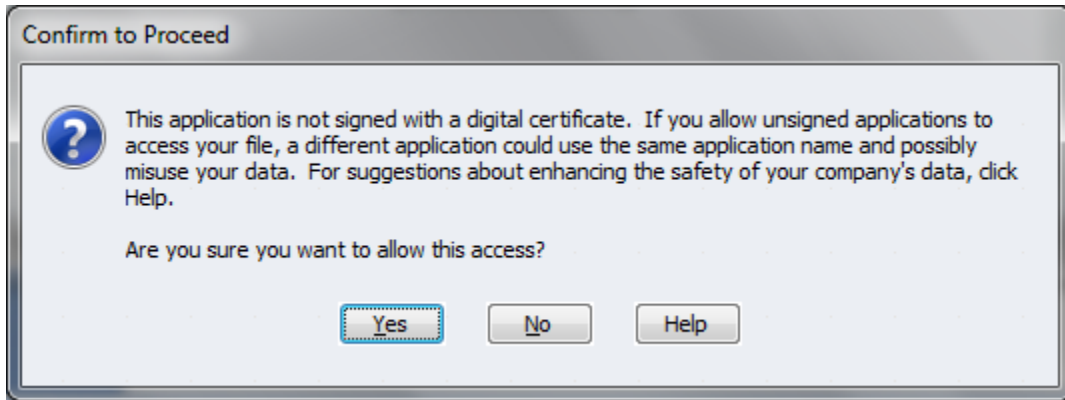
- The first time you use the Estimate Manager, QuickBooks will require you to grant permission to the utility to access data. Select “Yes, whenever this QuickBooks company file is open” and then click “Continue”.



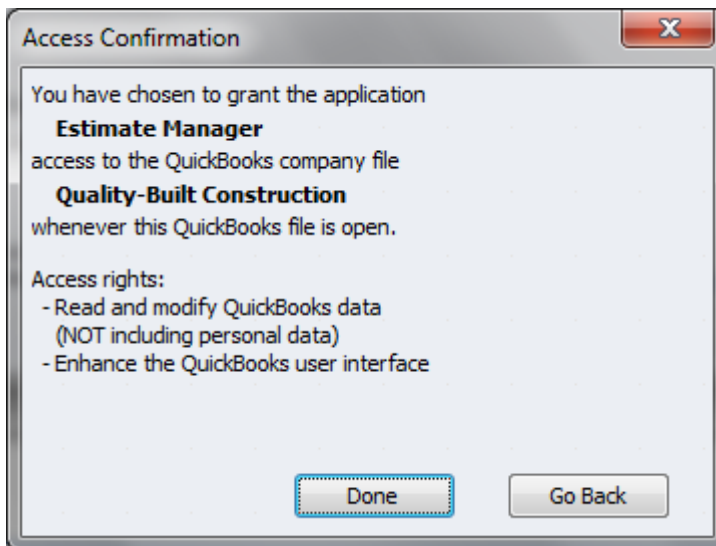


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7. A window will appear asking you to confirm, click "Yes".



8. Access Confirmation window will appear, click "Done"



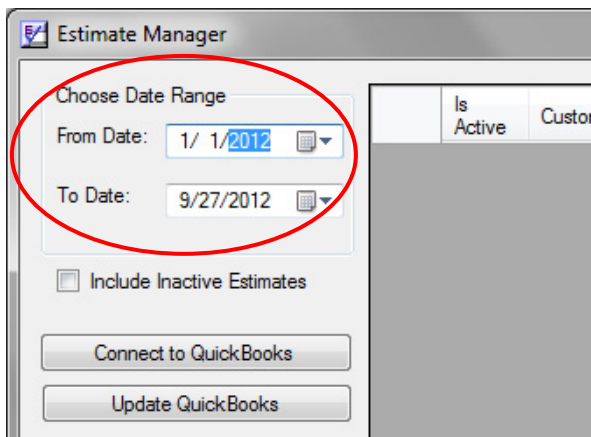


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Selecting Estimates to work with

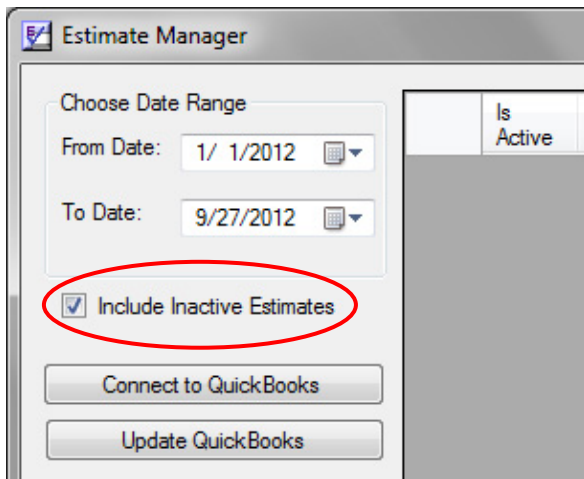
1. Entering a Date Range:

Select the Date Range of the Estimates that you would like to work with by entering the dates in the “From Date” and “To Date” Sections



2. Active versus Inactive Estimates:

By default Estimate Manager will only retrieve Estimates in QuickBooks that are Active. Check the box “Include Inactive Estimates” to retrieve all Estimates in the date range that you have selected.

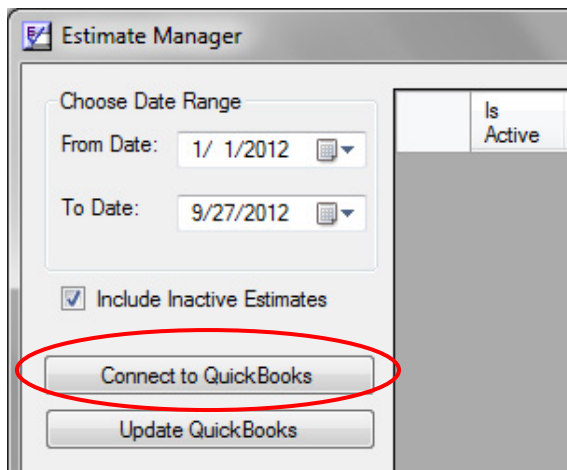




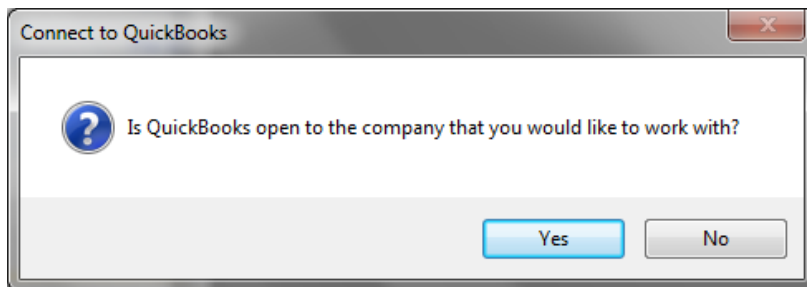
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3. Connecting to QuickBooks:

To load the Estimates that meet the parameters you have set in steps one and two, click “Connect to QuickBooks”



4. Ensure that QuickBooks is opened to the company file you would like to work with and click “Yes”





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Working with Estimates

Deactivating Estimates

1. Use the check boxes under the column “Is Active” to Activate or Deactivate Estimates. To Activate/Deactivate all of the Estimates in the list, click the box that says “Activate All” or “Deactivate All”. This is a great way to quickly edit the active status of a large quantity of Estimates at once.

The screenshot shows the Estimate Manager application window. On the left, there is a control panel with a date range selector (From Date: 1/1/2012, To Date: 1/1/2020), a checkbox for 'Include Inactive Estimates', and buttons for 'Connect to QuickBooks', 'Update QuickBooks', 'Deactivate All' (circled in red), and 'Mark All To be Emailed'. The main area displays a table of estimates with the following data:

Is Active	Customer:Job	Date	Number	Total	To Be Emailed	Memo
<input type="checkbox"/>	Wilson, Brandon:Custo...	1/1/2014	01-1001	\$113,400.00	<input type="checkbox"/>	This is a memo
<input type="checkbox"/>	Cruz, Albert:Kitchen R...	1/1/2014	01-1006	\$200,000.00	<input type="checkbox"/>	
<input type="checkbox"/>	Tedford, Dan:Addition	1/20/2014	01-1002	\$120,000.00	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Campbell, Heather:Ho...	4/1/2015	01-1007	\$207,682.50	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Molotsi, Hugh:Second ...	9/1/2015	01-1008	\$450,000.00	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Molotsi, Hugh:Second ...	9/1/2015	Milestone	\$450,000.00	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Wiessinger, Gary:Bathr...	1/1/2016	01-1010	\$164,205.00	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Wiessinger, Gary:Gues...	3/15/2016	01-1011	\$205,300.00	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Wiessinger, Gary:Gues...	3/31/2016	Milestone	\$325,000.00	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Cruz, Albert:Cottage - ...	8/15/2016	01-1012	\$198,825.00	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	Cruz, Albert:Cottage - ...	9/1/2016	Milestone	\$335,000.00	<input checked="" type="checkbox"/>	



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Editing Estimate Information

- To edit Estimate Information, simply click on the field that you would like to edit (Date, Number, or Memo) and make the necessary changes. You can only edit Customer:Job Name and Estimate Total in QuickBooks.

The screenshot displays the Estimate Manager application window. On the left, there is a control panel with the following elements:

- Choose Date Range:** From Date: 1/ 1/2012, To Date: 1/ 1/2020.
- Include Inactive Estimates
- Connect to QuickBooks
- Update QuickBooks
- Deactivate All
- Mark All To be Emailed

The main area contains a table with the following data:

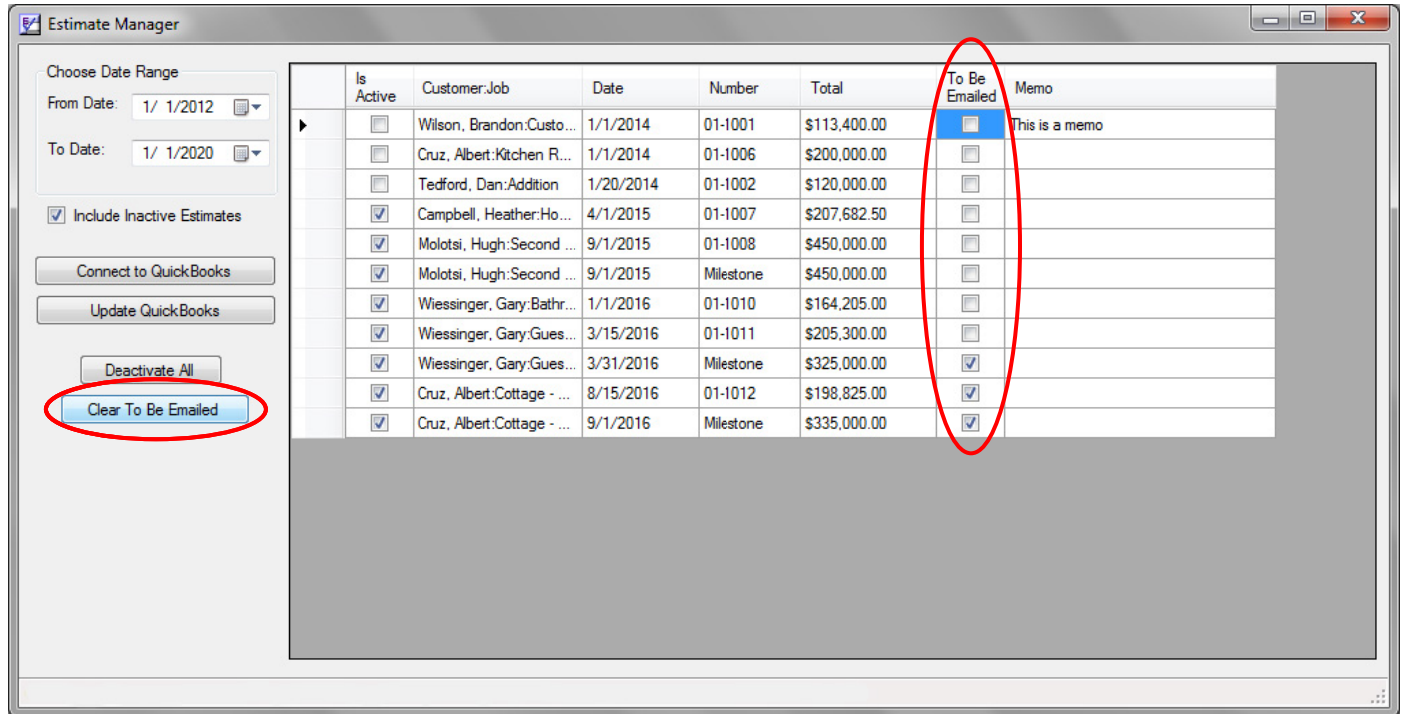
Is Active	Customer:Job	Date	Number	Total	To Be Emailed	Memo
<input type="checkbox"/>	Wilson, Brandon:Custo...	1/1/2014	01-1001	\$113,400.00	<input type="checkbox"/>	This is a memo
<input type="checkbox"/>	Cruz, Albert:Kitchen R...	1/1/2014	01-1006	\$200,000.00	<input type="checkbox"/>	
<input type="checkbox"/>	Tedford, Dan:Addition	1/20/2014	01-1002	\$120,000.00	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Campbell, Heather:Ho...	4/1/2015	01-1007	\$207,682.50	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Molotsi, Hugh:Second ...	9/1/2015	01-1008	\$450,000.00	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Molotsi, Hugh:Second ...	9/1/2015	Milestone	\$450,000.00	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Wiessinger, Gary:Bathr...	1/1/2016	01-1010	\$164,205.00	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Wiessinger, Gary:Gues...	3/15/2016	01-1011	\$205,300.00	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Wiessinger, Gary:Gues...	3/31/2016	Milestone	\$325,000.00	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Cruz, Albert:Cottage - ...	8/15/2016	01-1012	\$198,825.00	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	Cruz, Albert:Cottage - ...	9/1/2016	Milestone	\$335,000.00	<input checked="" type="checkbox"/>	



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Changing “To Be Emailed” Status

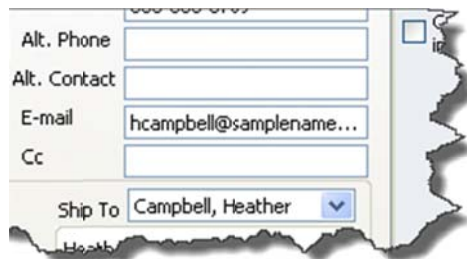
3. Use the check boxes in the column “To Be Emailed” to select whether an Estimate should be marked “To Be Emailed” in QuickBooks. You can also click the box “Clear To Be Emailed” to uncheck all of the boxes.



NOTE: A customer’s email address must be on file in QuickBooks or you will not be able to use Estimate Manager to mark an Estimate as To Be Emailed. Estimates marked To Be Emailed without a valid email address on file will be skipped when updating QuickBooks.

To update the customer’s email address in QuickBooks:

1. In QuickBooks click “Customers” and select Edit Customer for the customer that you would like to update.
2. Enter a valid email address in the Email field

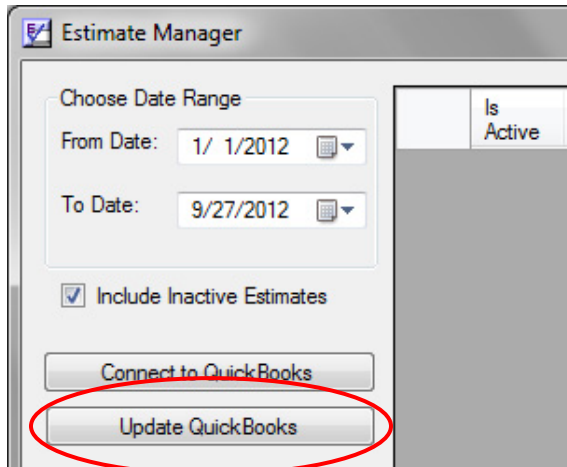




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Updating QuickBooks

1. To save your changes to QuickBooks, click “Update QuickBooks”



Note: To clear any changes you have made without updating QuickBooks, Click “Connect to QuickBooks” to refresh the list of Estimates from QuickBooks.

For information or help with Estimate Manager please visit our website at www.QButility.com, or email us support@qbutility.com.

Thank you for using Estimate Manager!