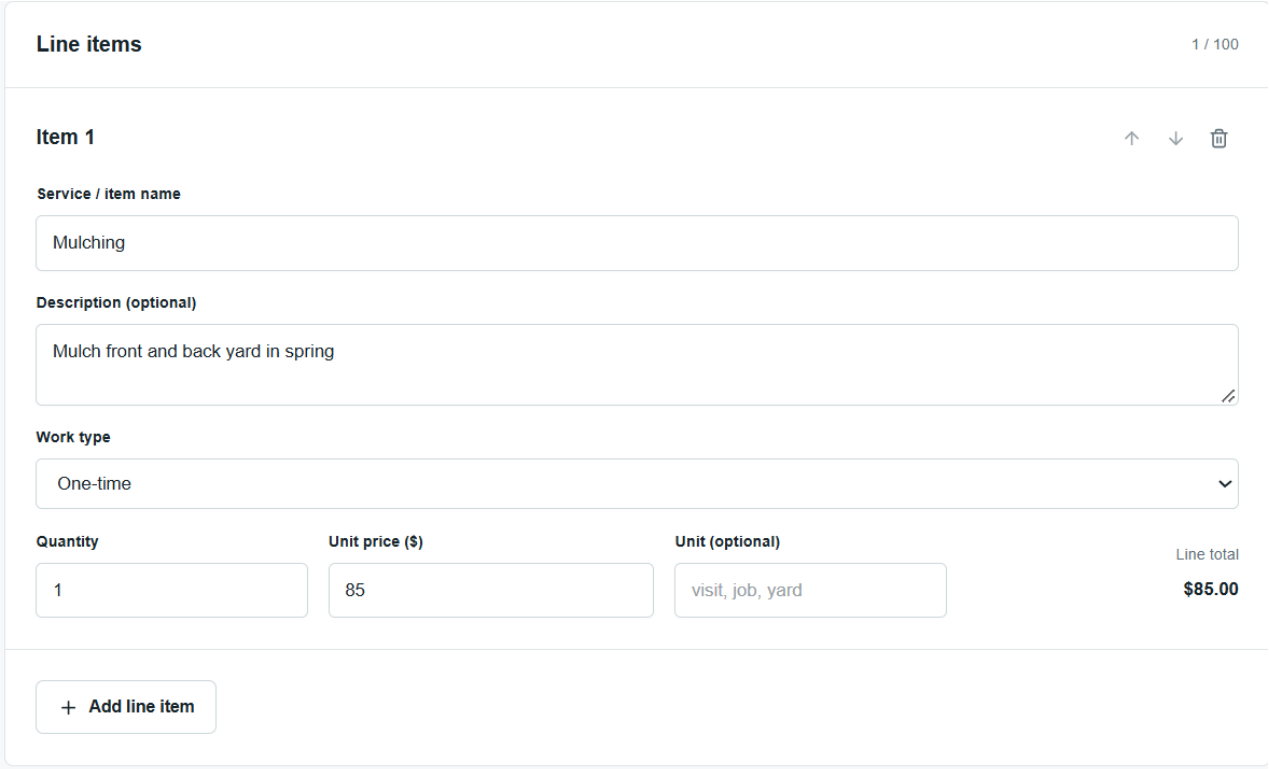
Creating & Sending Estimates

Build a draft, create its customer link, then share or email it. Sharing a link and sending an email are separate actions.

Build and review the draft

1. Open Customers and select a customer with a property, then select Create Estimate.
2. Choose the Property. Add a Service / item name, Quantity, and Unit price ($). Choose One-time or Recurring under Work type; recurring items also need service dates and frequency.
3. Use Add line item for more work. Check customer message, discount, tax, and optional Valid until. Internal notes stay inside your company.
4. Select Save Draft. Review the estimate; use Edit draft to correct it before sharing.



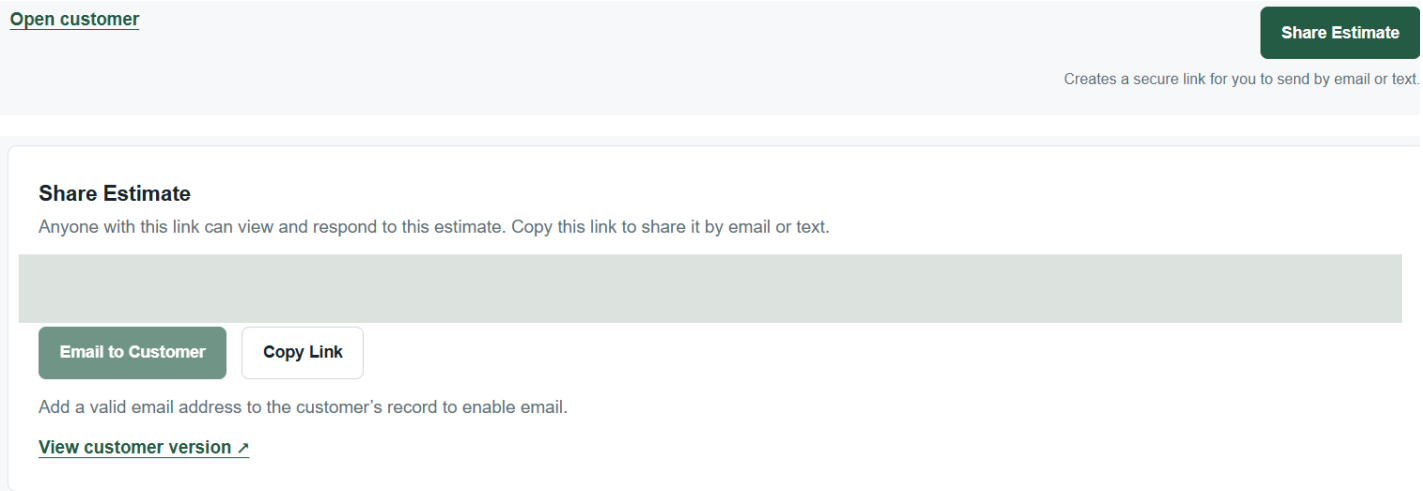
One estimate line item. Recurring work reveals additional frequency and date fields.

What to expect: The estimate remains Draft until you select Share Estimate.

Creating & Sending Estimates

Share the customer link

5. On the draft, select Share Estimate to create its secure customer link.
6. In Share Estimate, select Copy Link and send it to the intended customer using your usual email or text app.
7. Use View customer version to check what the customer sees. Treat the link as private: anyone with it can view and respond.



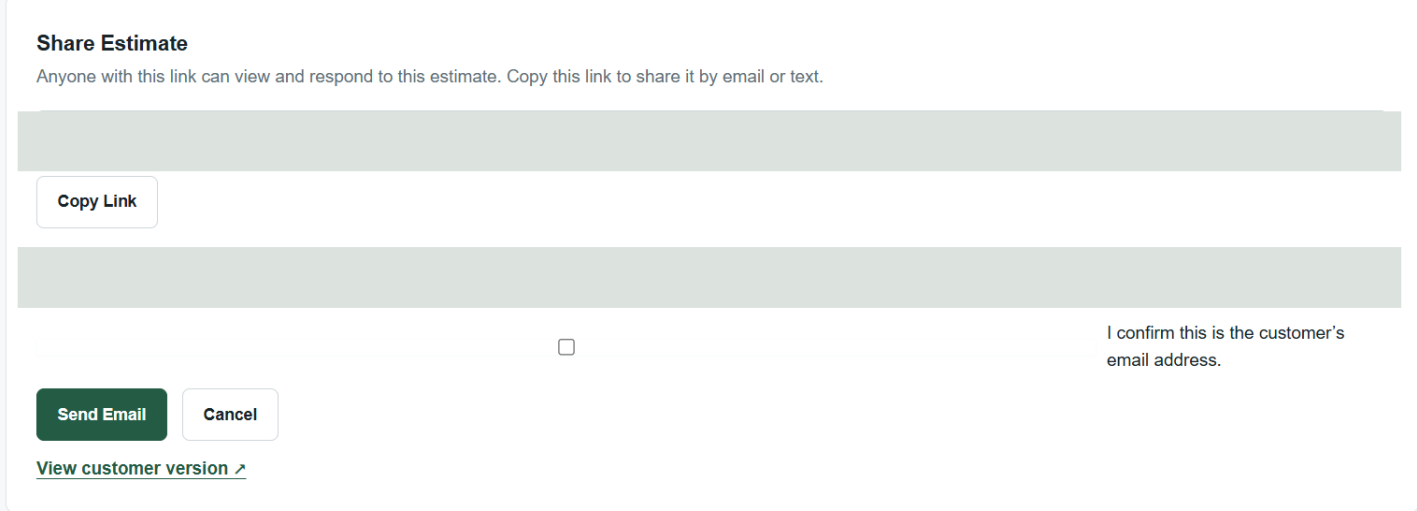
Share Estimate creates the link. The shared panel offers Copy Link; the private URL is removed here.

What to expect: The owner status shows Shared. Sharing locks the estimate; it does not automatically email it.

Creating & Sending Estimates

Email it and receive a response

8. To email from Yardline, first save a valid email on the customer's record. Select Email to Customer on the shared estimate.
9. Check the recipient and reply-to address. Tick I confirm this is the customer's email address, then select Send Email.
10. The customer opens the link and selects Accept Estimate or Decline while the estimate is still open and unexpired.
11. After acceptance, review the Accepted status. Use Set Up Work for items not yet converted, create service drafts, and activate each service to generate visits.



Email confirmation. Link, recipient, and reply-to details are physically redacted.

What to expect: Submitted to email provider does not confirm delivery. If email is unavailable, use Copy Link. Acceptance alone does not schedule work.