How to Export an Estimate from UltraMate

- 1. Close any open estimates.
- 2. On the Utilities menu, click Write Export File.

The following screen is displayed:

Export To							
Save jn:	🚞 export		-	00			
My Recent Documents Desktop My Documents My Computer	portest1 pgrtest1_co Prgtest1_S1 trash	m JanDVD					
My Network	File <u>n</u> ame:	× × ,			-	9	<u>i</u> ave
	Save as type:	All Files (*.*)			-	C	ancel

3. Select the **drive** and **folder** where the export files is to be saved.

Use the drop-down for "**Save in:**" (top of the screen) to find the location of any folder on your machine. Select the folder where you want to save the export file.

4. Enter a name for the export file.

Type the name in the "File name:" field (near the bottom of the screen).

5. Select Save.

6. The following screen presents a list of all estimates that are exportable:

xport						X		
Exportable Files								
Filtering Filtering Saved Date Filtering To: 77				Reset Columns 2 of 2 Exportable Files Displayed Apply Filter Find Insurance Co.:				
Uploaded	Status	Estimate Id	Claim No.	Repair Order #	Supplement #	Correction # (
No	E CALC E COM	073605088	073605088		0	ŭ		
)	Export	Cancel) <u>H</u> elp		

- 7. Select the estimate (or estimates) you wish to export.
- 8. Select Export.
- 9. The estimate(s) is/are written to the file previously specified. When the export is complete, the number of estimates exported is displayed.
- 10. Attach the export file to an **Email** and **Send**.

How to Import an Estimate into UltraMate

- 1. Close any open estimates.
- 2. On the Utilities menu, click Read Import File.
- 3. Select the **drive** and **folder** where the import file is located.

Use the drop-down for "**Look in:**" (top of the screen) to find the location of any folder on your machine. Select the folder that has the import file.

Import From						2 💌
Look in:	🚞 import		•	3 🕫 6	>	
My Recent Documents Desktop My Documents My Computer	pgrtest1 pgrtest1_co Prgtest1_S1 trash	m _JanDVD				
My Network Places	File <u>n</u> ame:	× ×				ок
	Save as type:	All Files (*.*)			-	Cancel

- 4. Select the **file** to be imported.
- 5. Click **OK**. The file is imported. When complete, the Import Status dialog box appears.
- 6. Click **OK** to close the Import Status dialog box.
- 7. The imported estimate can be opened using the normal procedures.