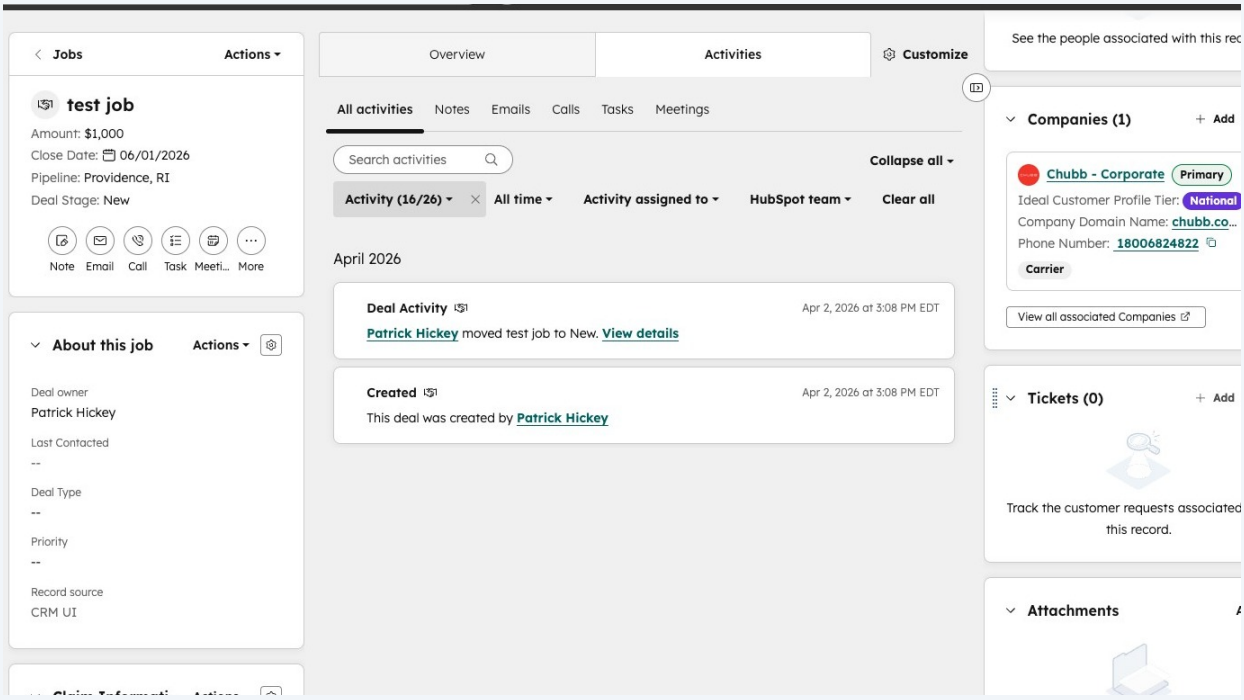
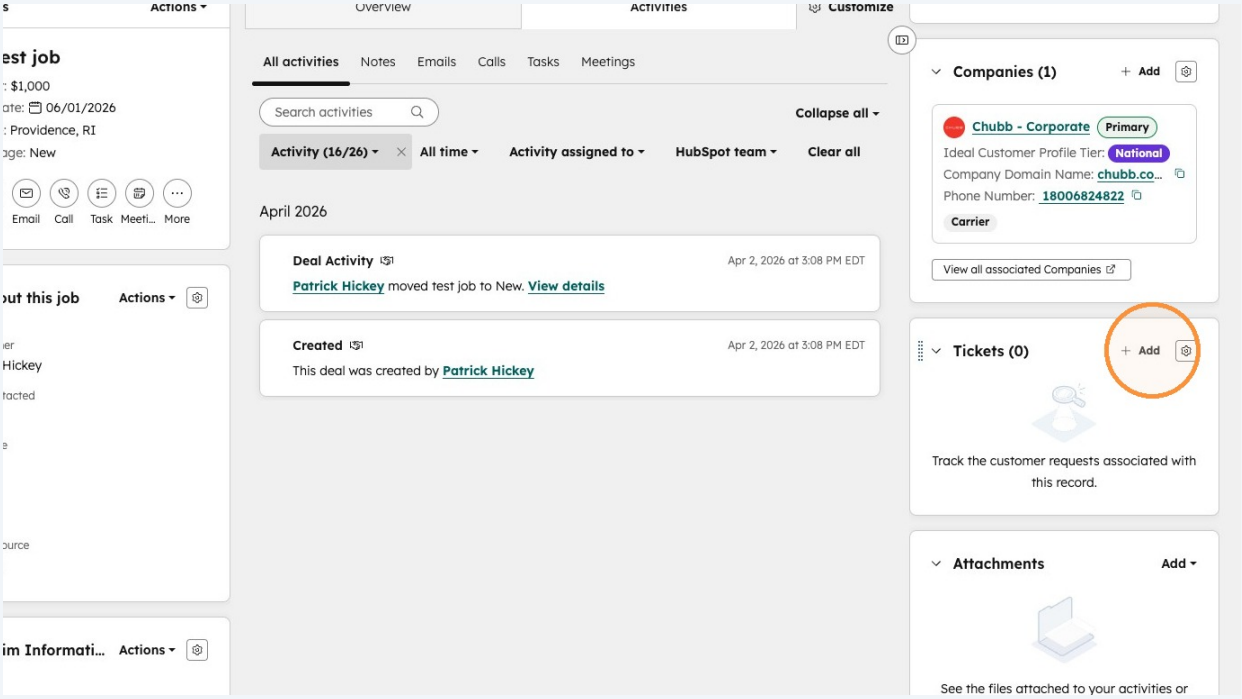
Create a New Estimate or Supplement Review in HubSpot (Updated 6/3/2026)

Learn how to efficiently document job details and create a new estimate or supplement review record. This guide ensures all required fields are accurately populated to streamline this workflow.

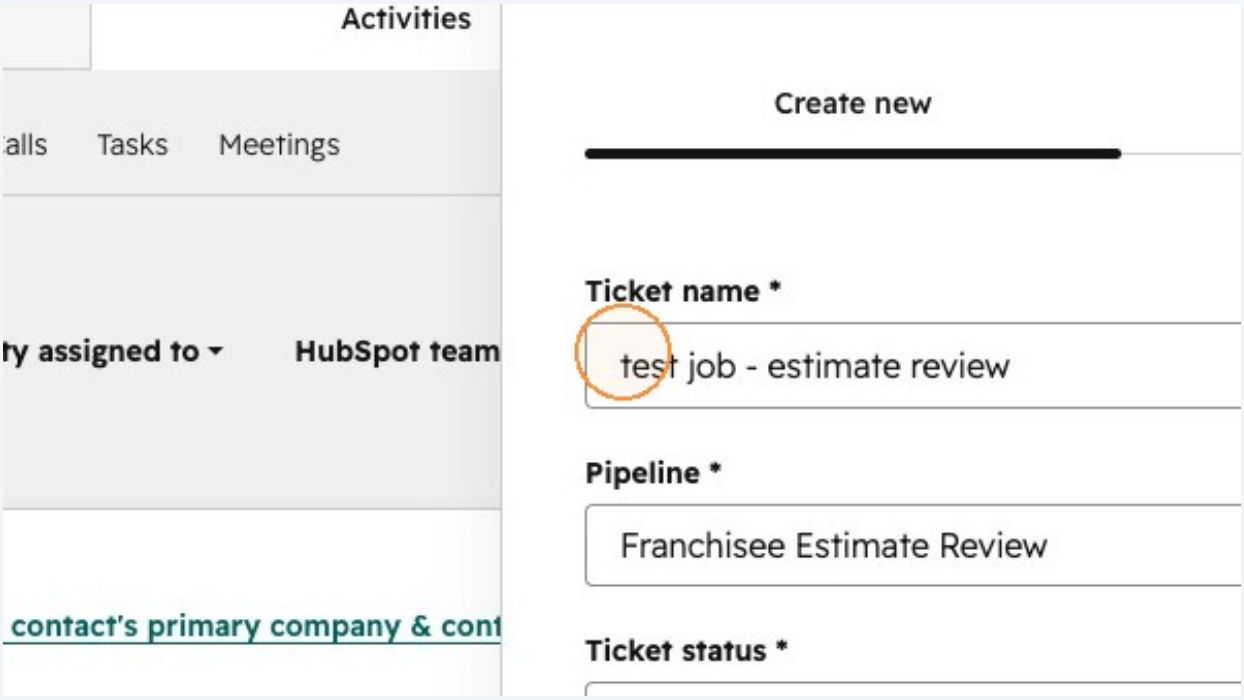
1 Navigate to the job that requires an Estimate of Supplement review



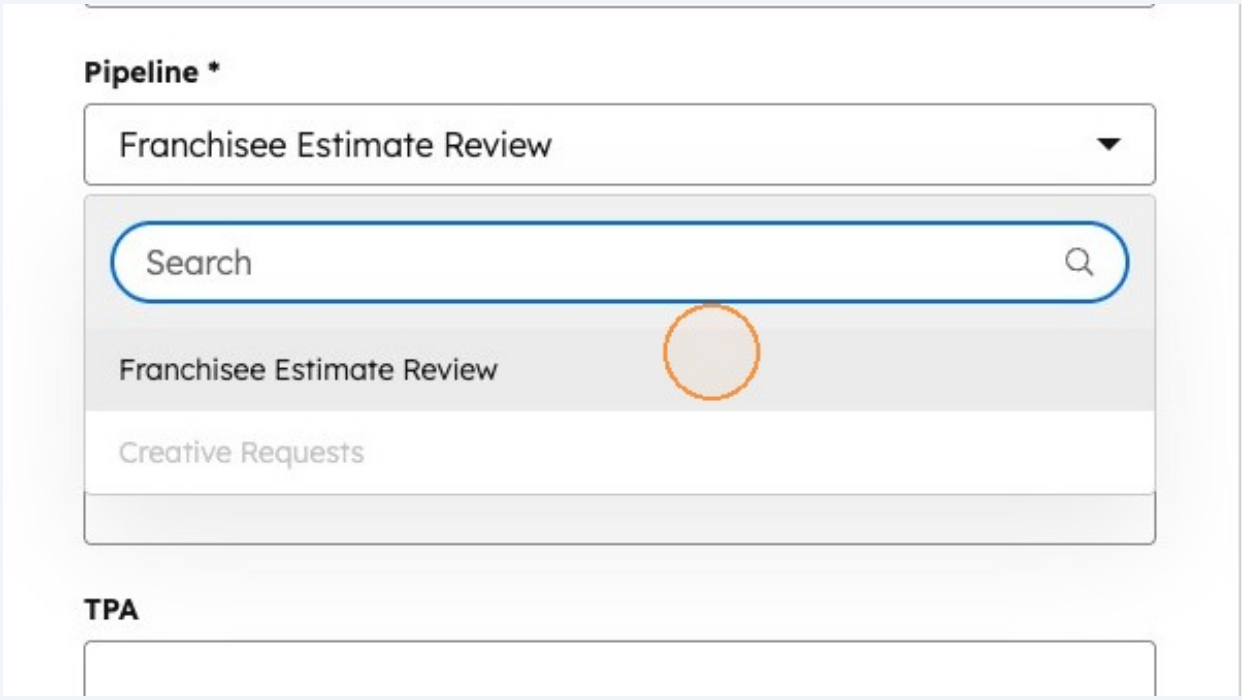
2 Scroll down on the right side bar to "Tickets" and click "+ Add"



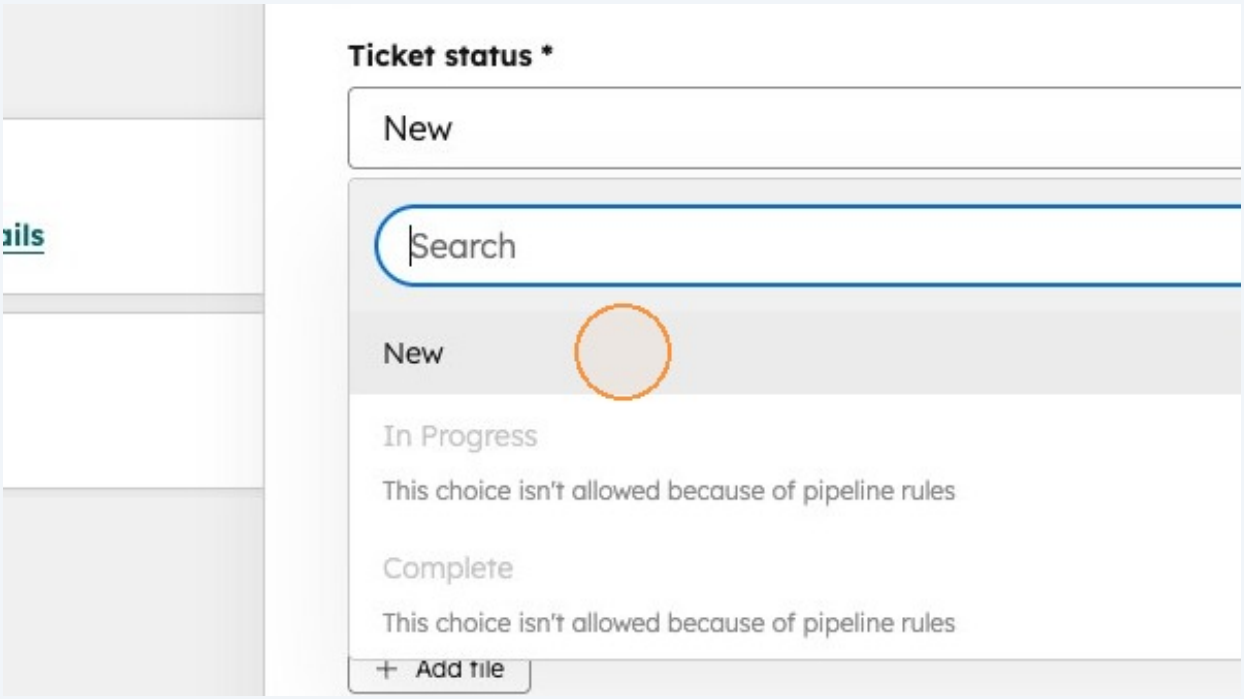
3 Enter the Ticket Name



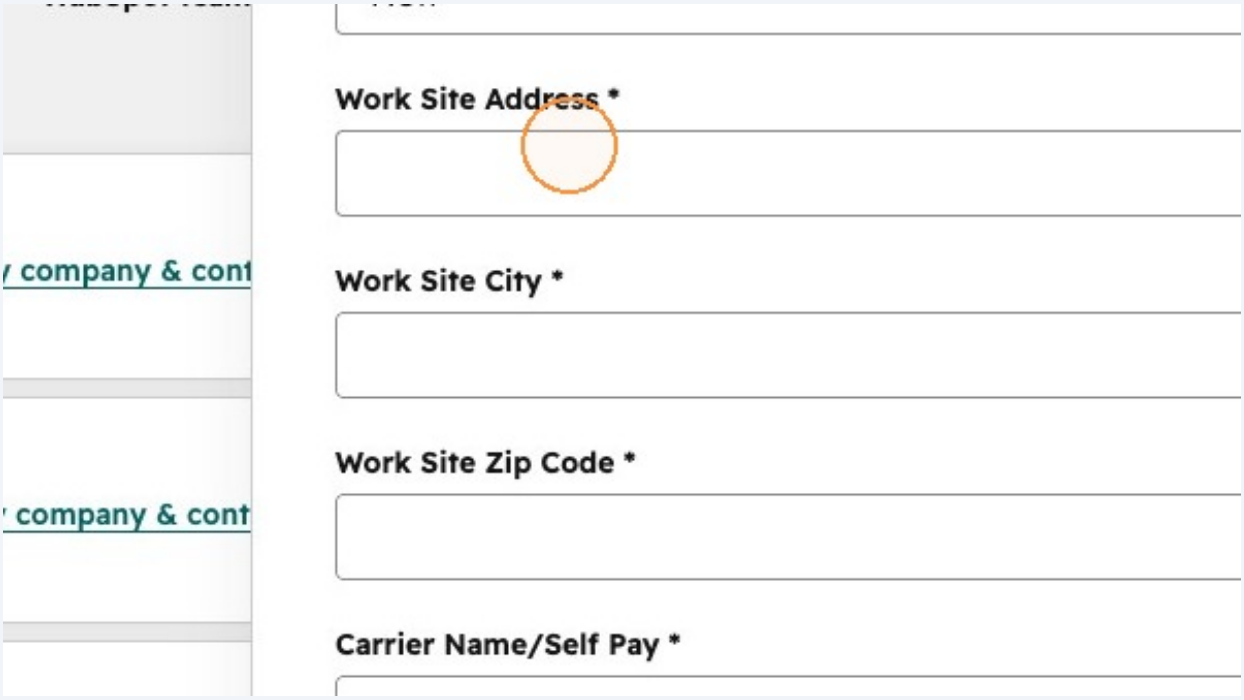
4 The pipeline will be auto selected to "Franchisee Estimate Review"



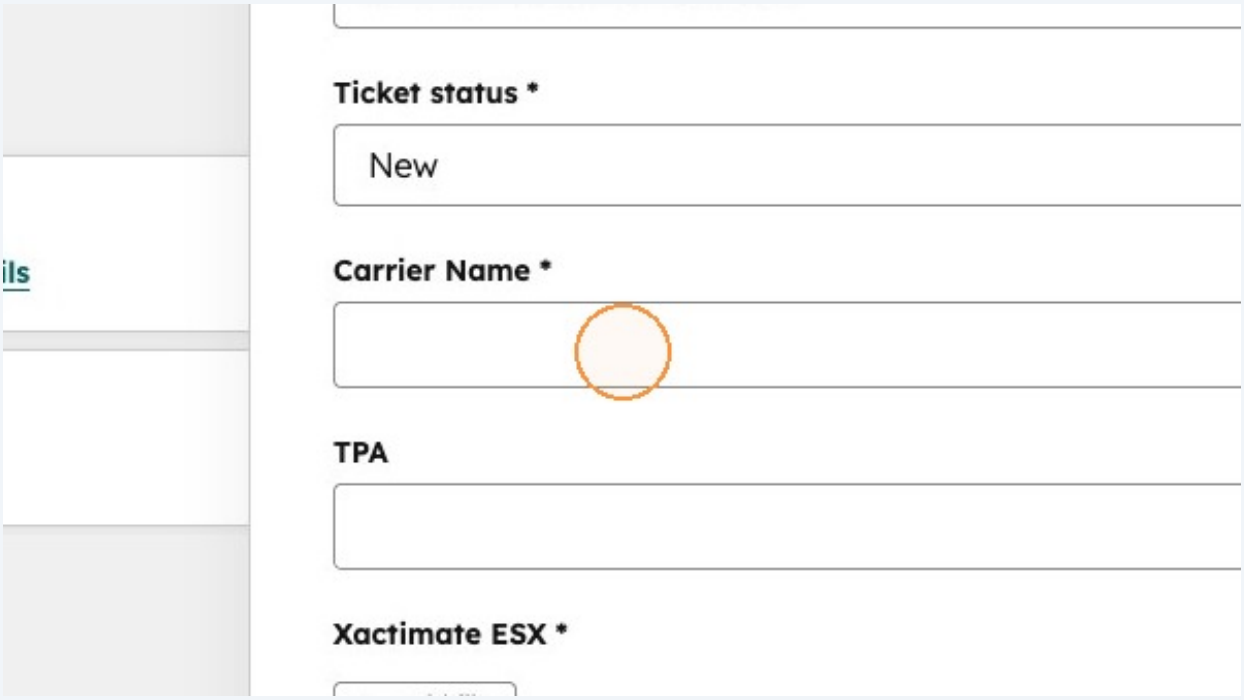
5 The ticket status will be auto selected to "New"



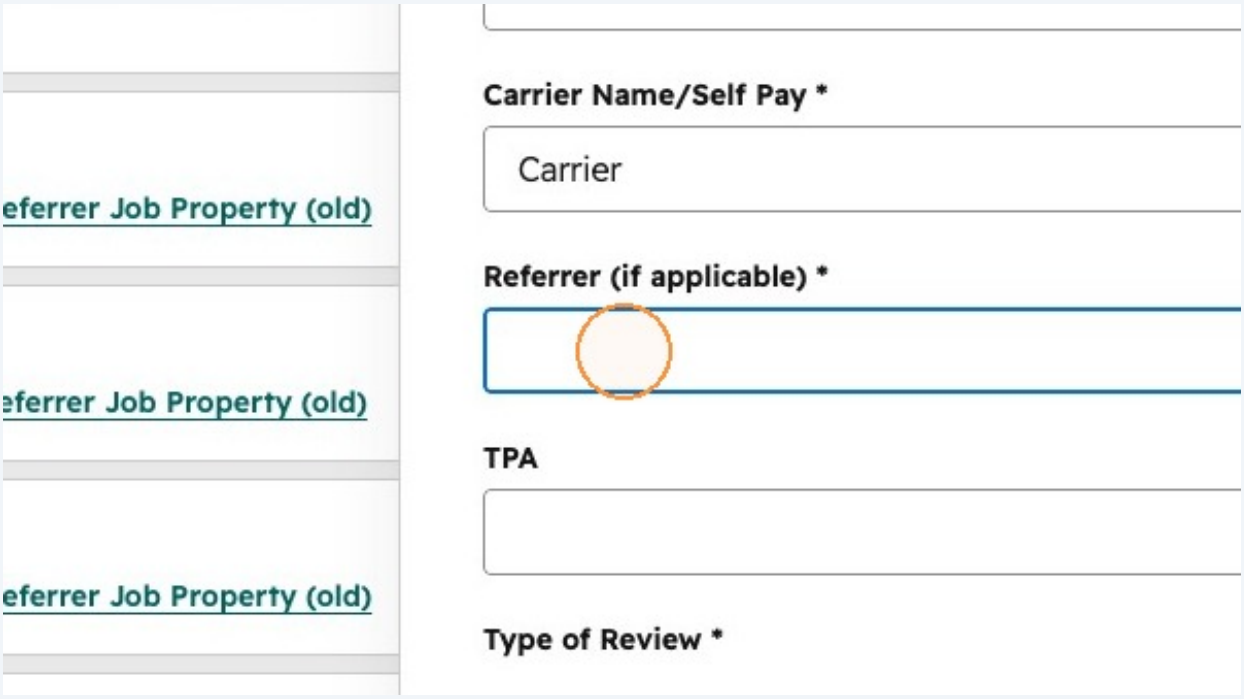
6 Enter the Work Site Address, City, and Zip Code



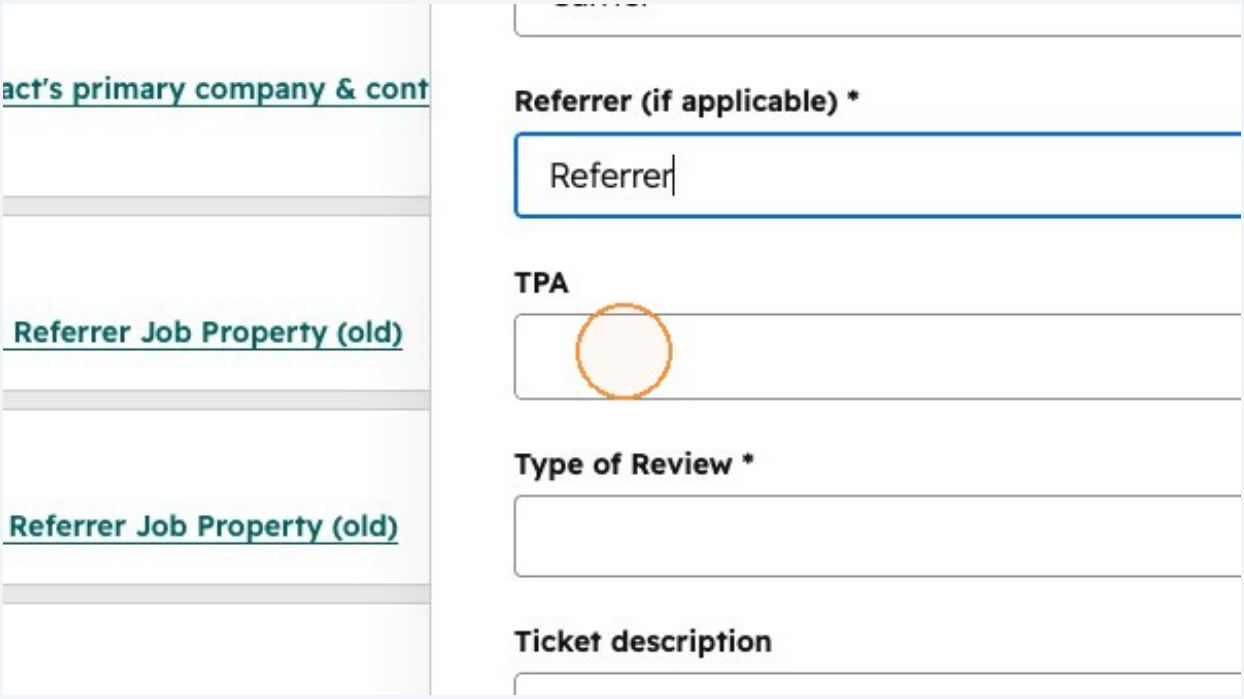
7 Enter the Carrier associated to the job



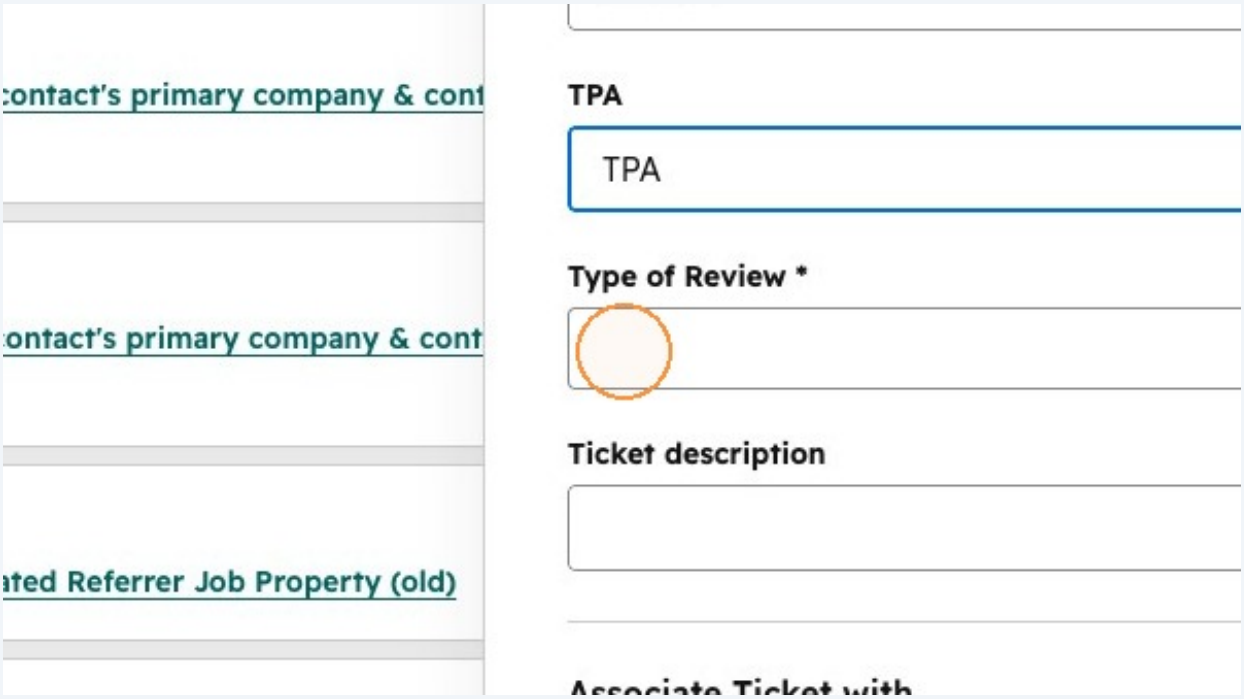
8 Enter the Referrer associated to the job



9 Enter the TPA associated to the job



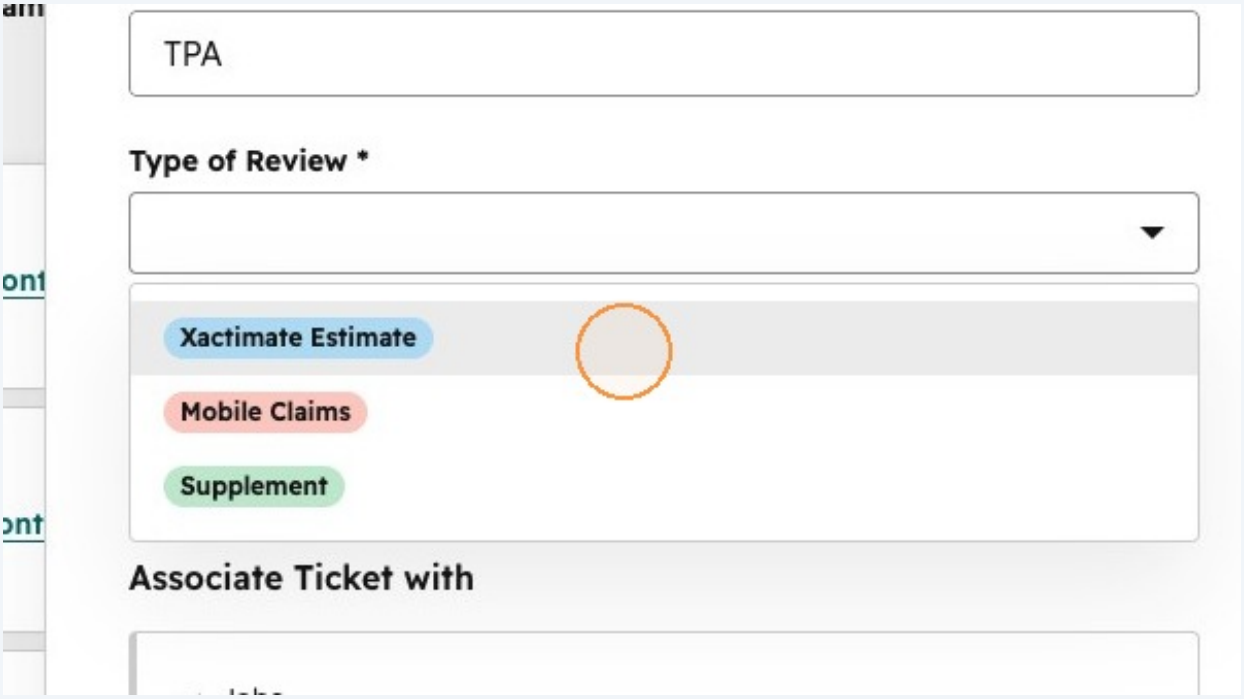
10 Click "Type of Review" field



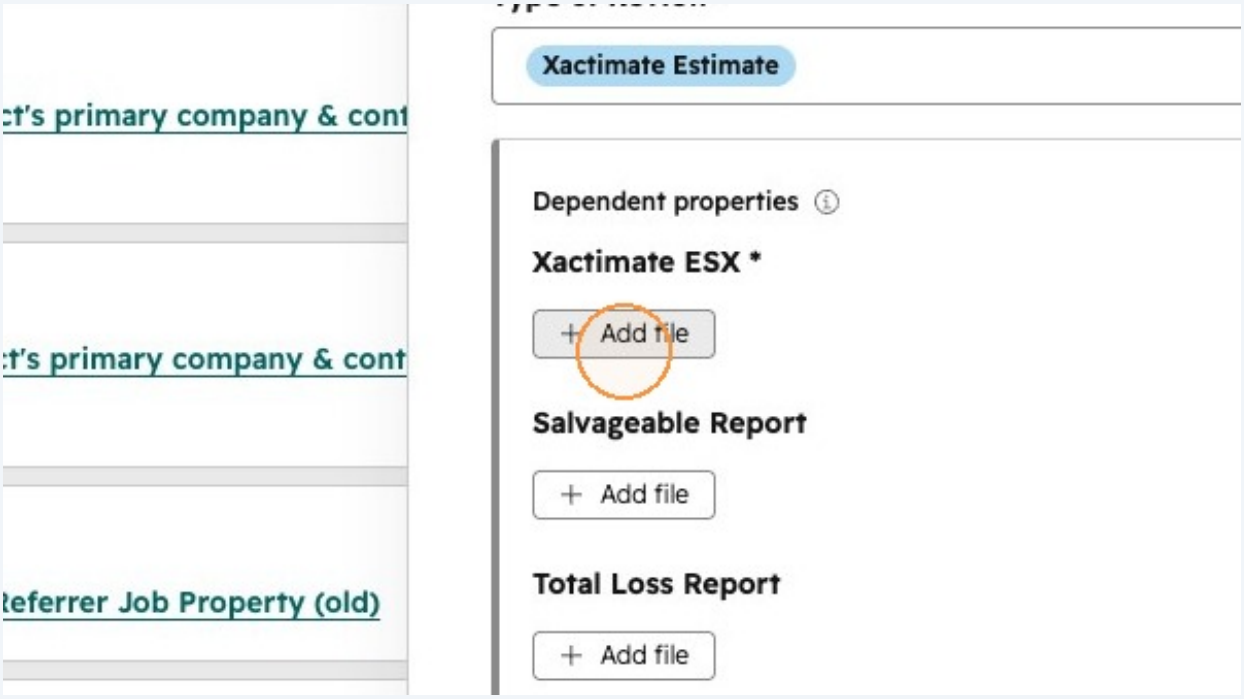
11 For Xactimate estimates, Click "Xactimate Estimate" and follow the steps below

For Mobile Claims, click "Mobile Claims" and go to Step 22

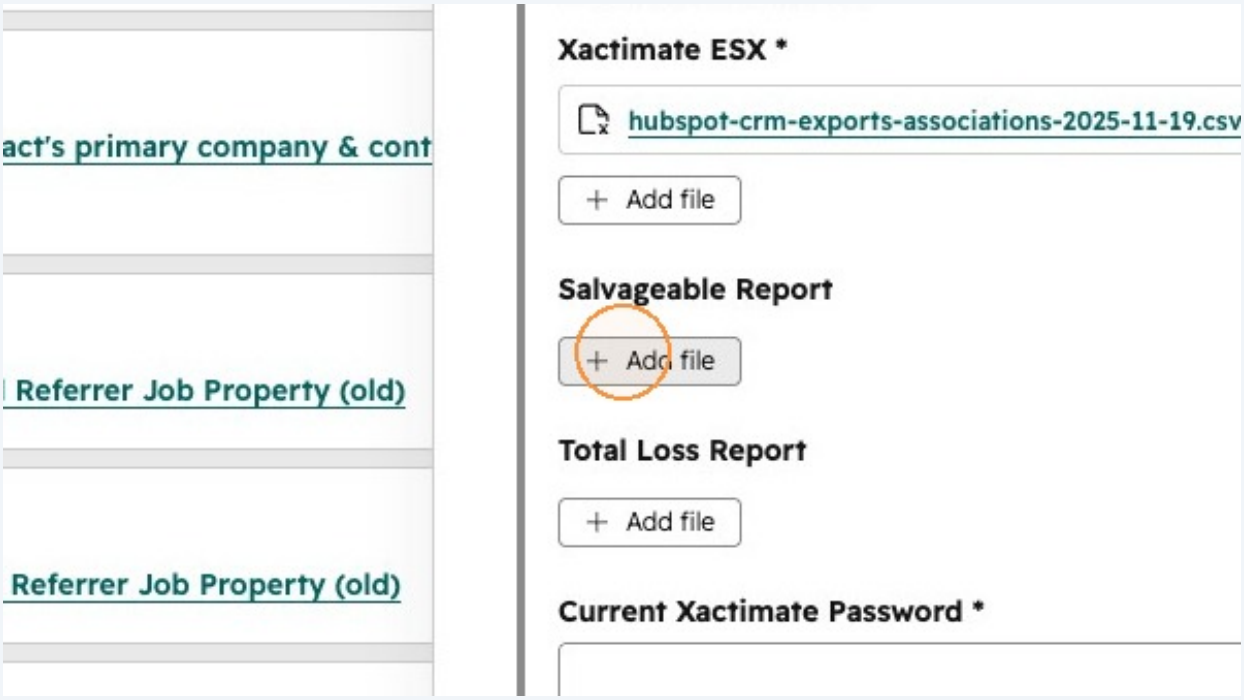
For Supplements, click "Supplements" and go to Step 23



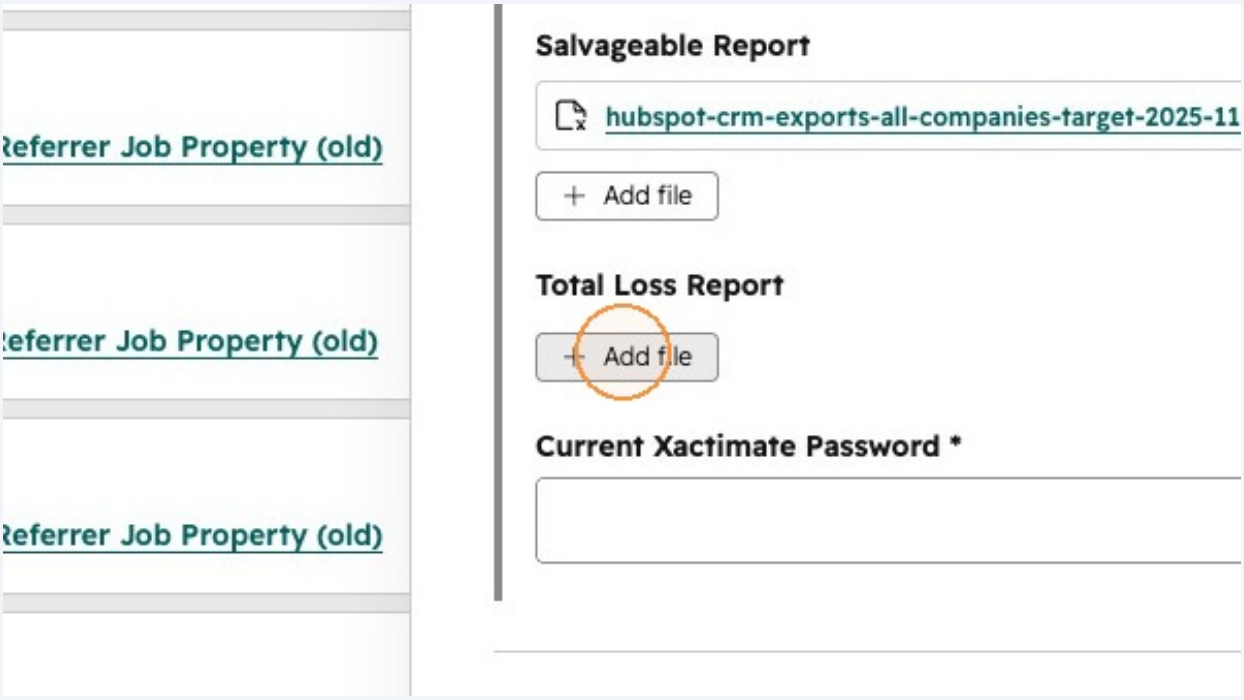
12 Under Xactimate ESX, Click "Add file" and upload the ESX file.



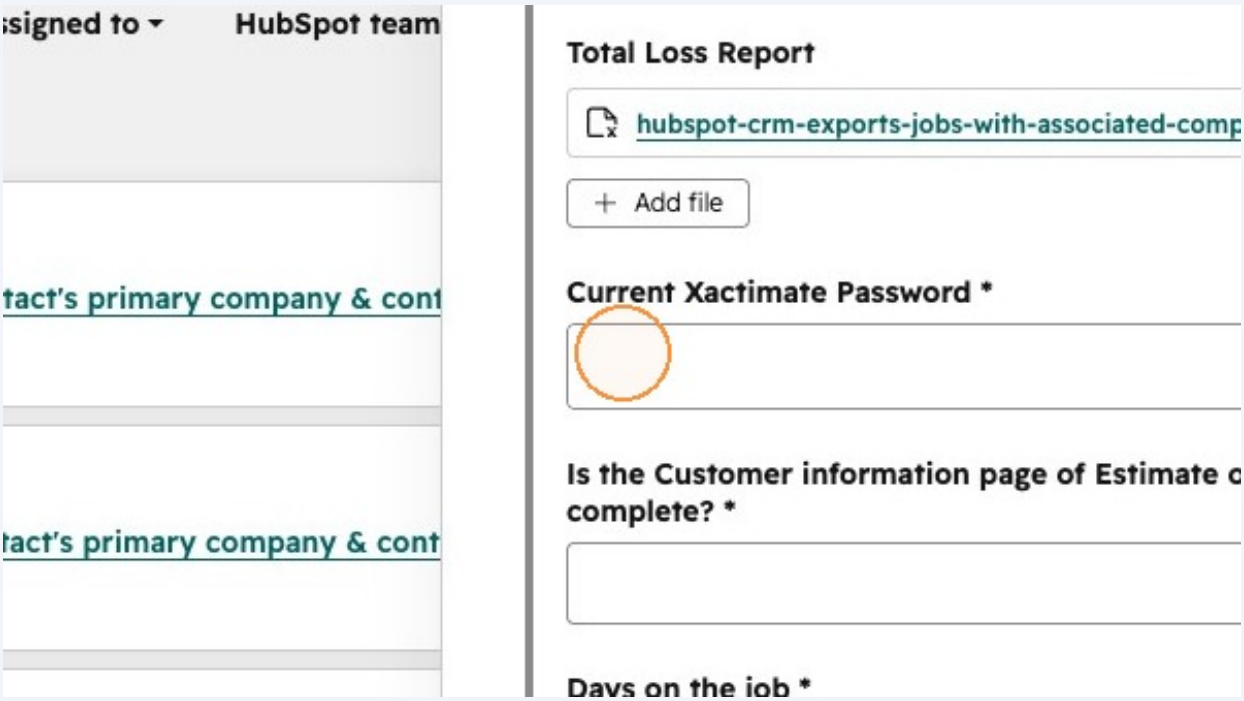
13 If applicable, upload the Salvageable Report



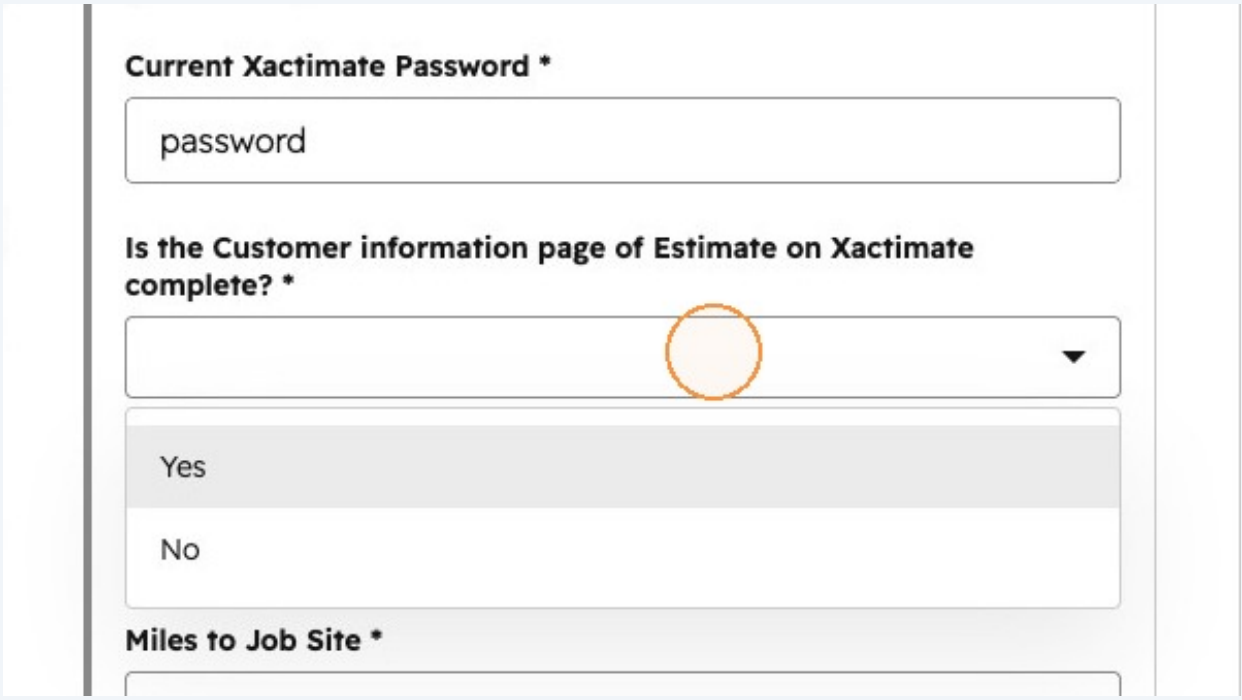
14 If applicable, upload the Total Loss Report



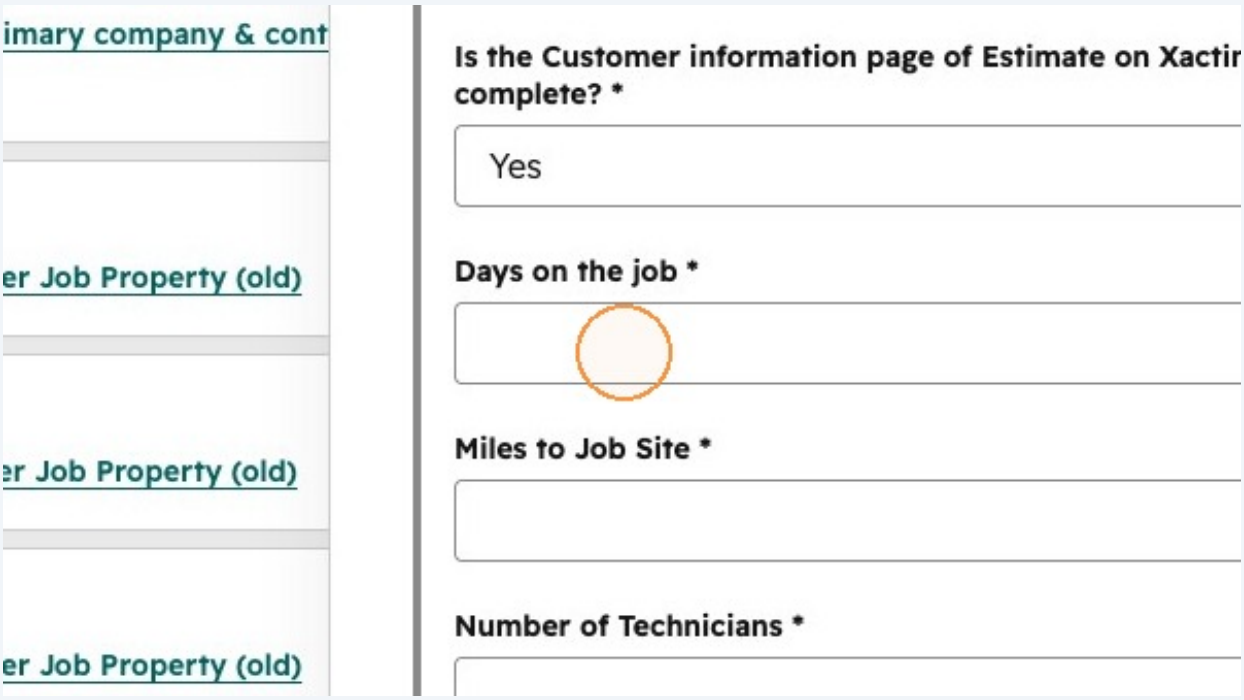
15 Click the "Current Xactimate Password" field and enter your password



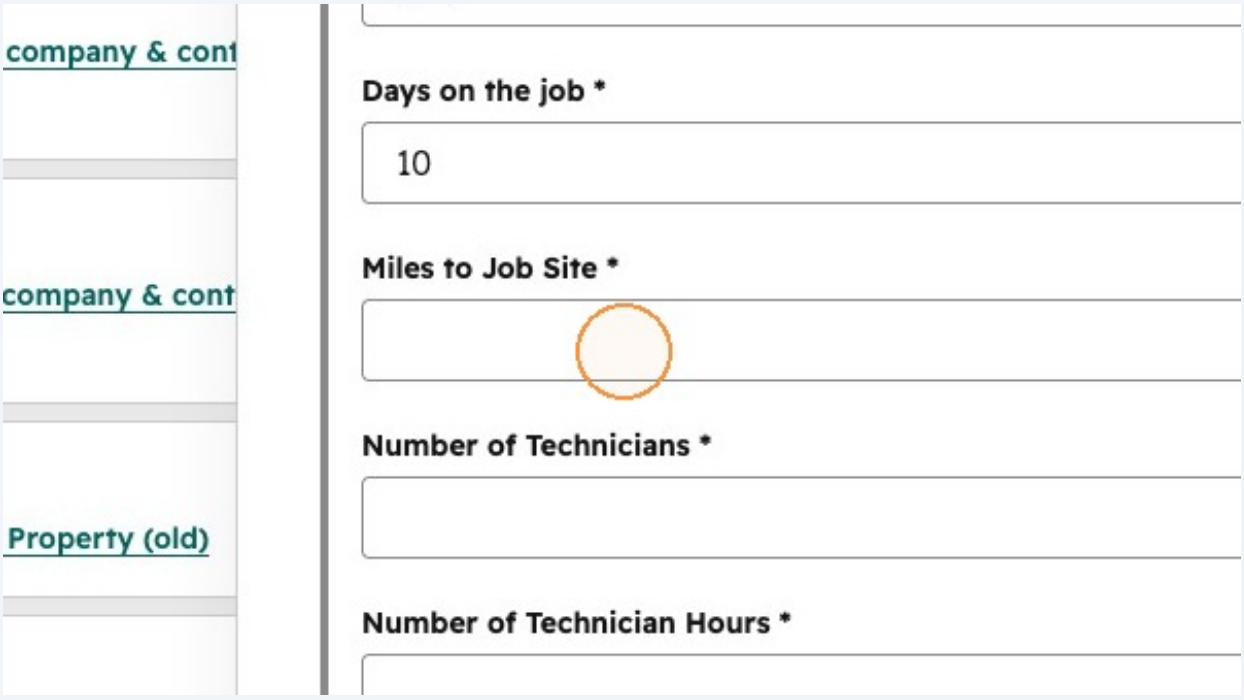
16 Click the dropdown for the "Customer information page of estimate complete" and select "Yes" or "No".



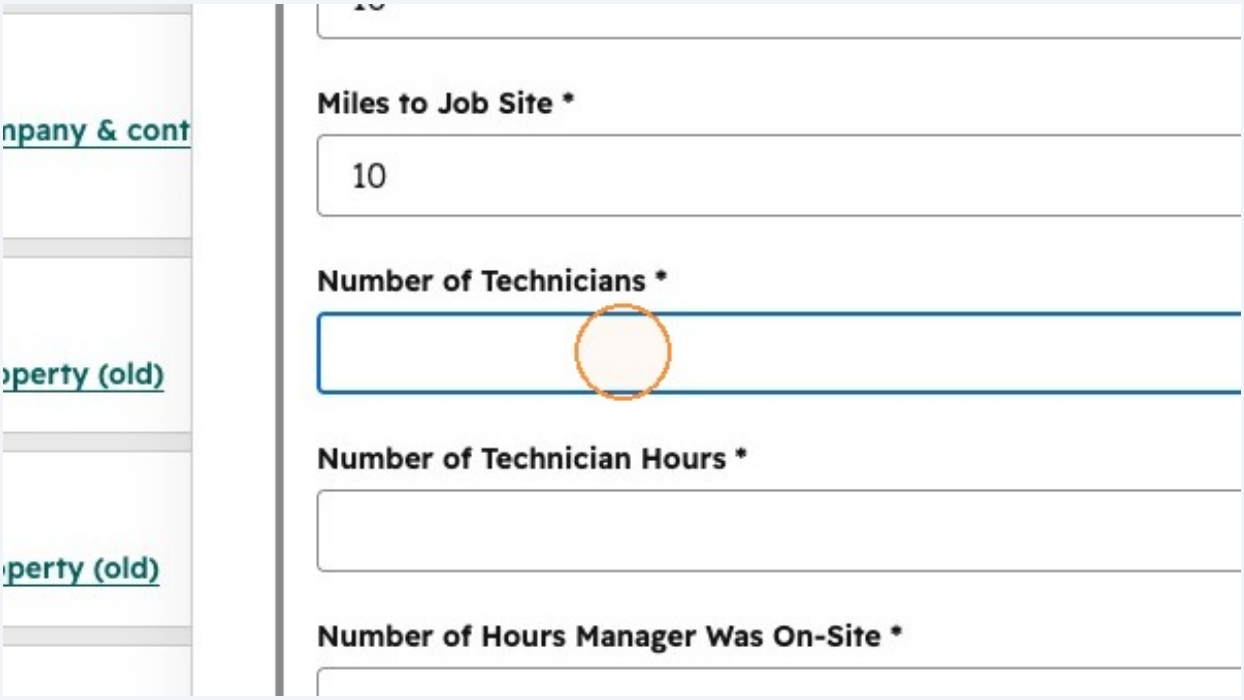
17 Click the "Days on the job" field and enter the number of days



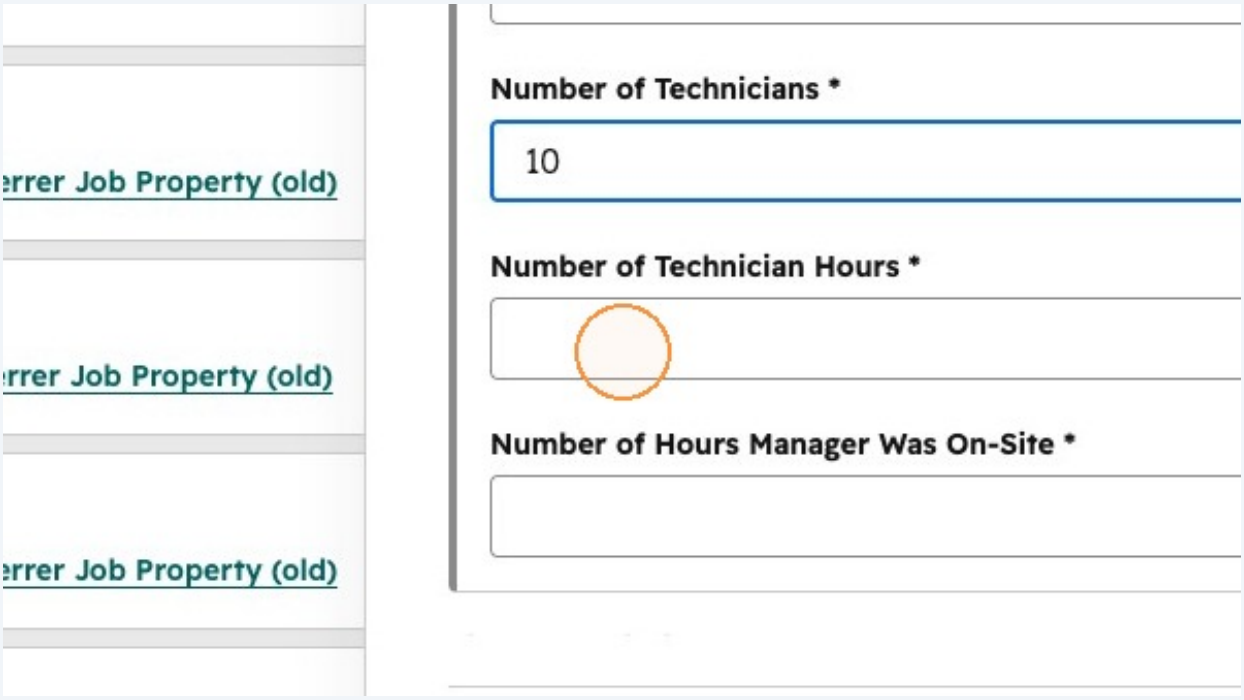
18 Click the "Miles to job site" field and enter number of miles to the job site.



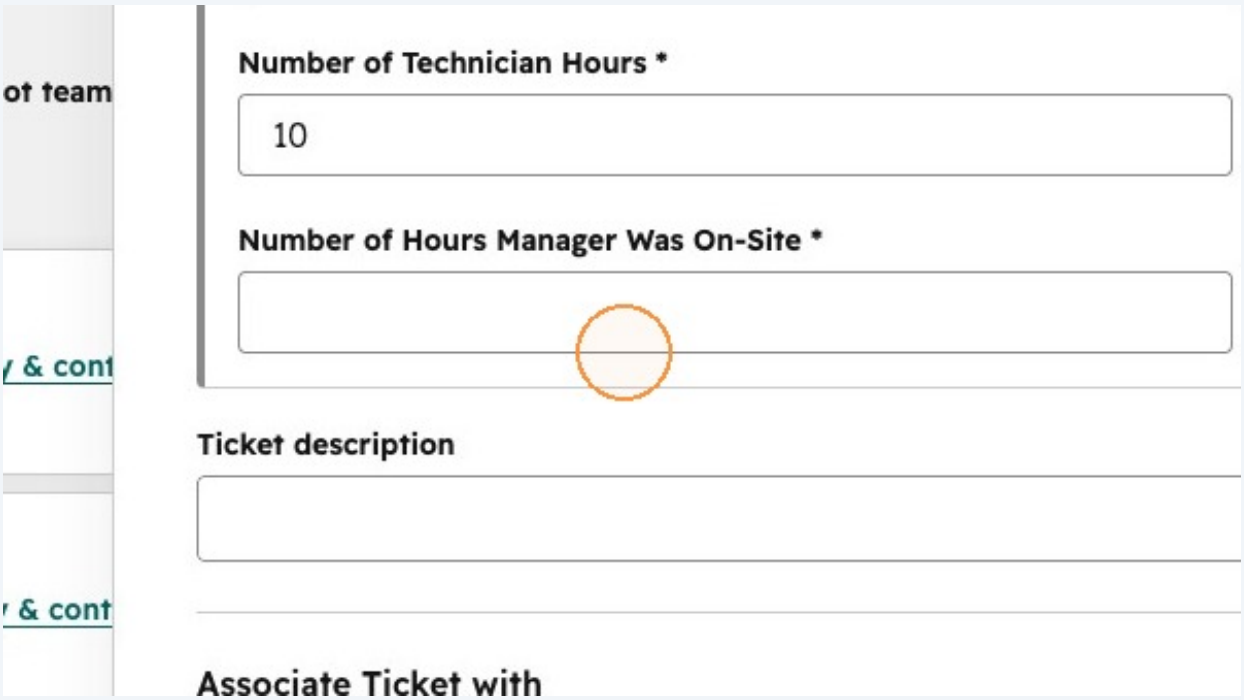
19 Click the "Number of Technicians" field and enter the number of technicians



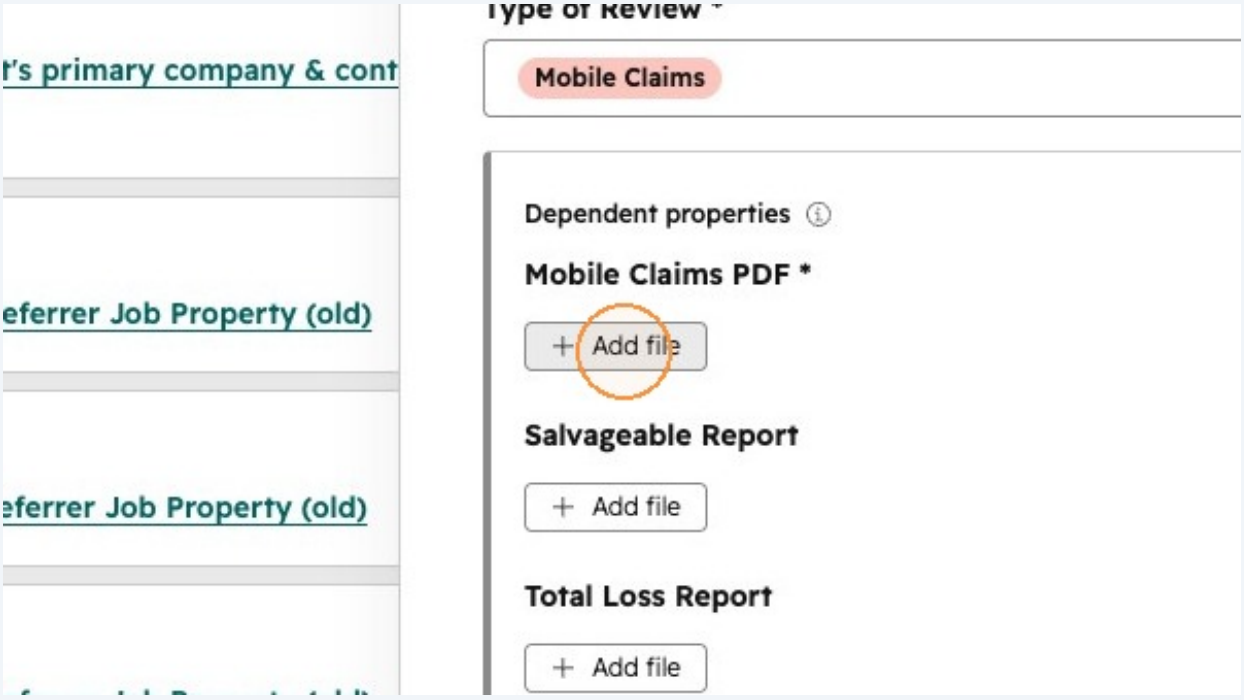
20 Click the "Number of Technician Hours" field and enter the number of Technician hours



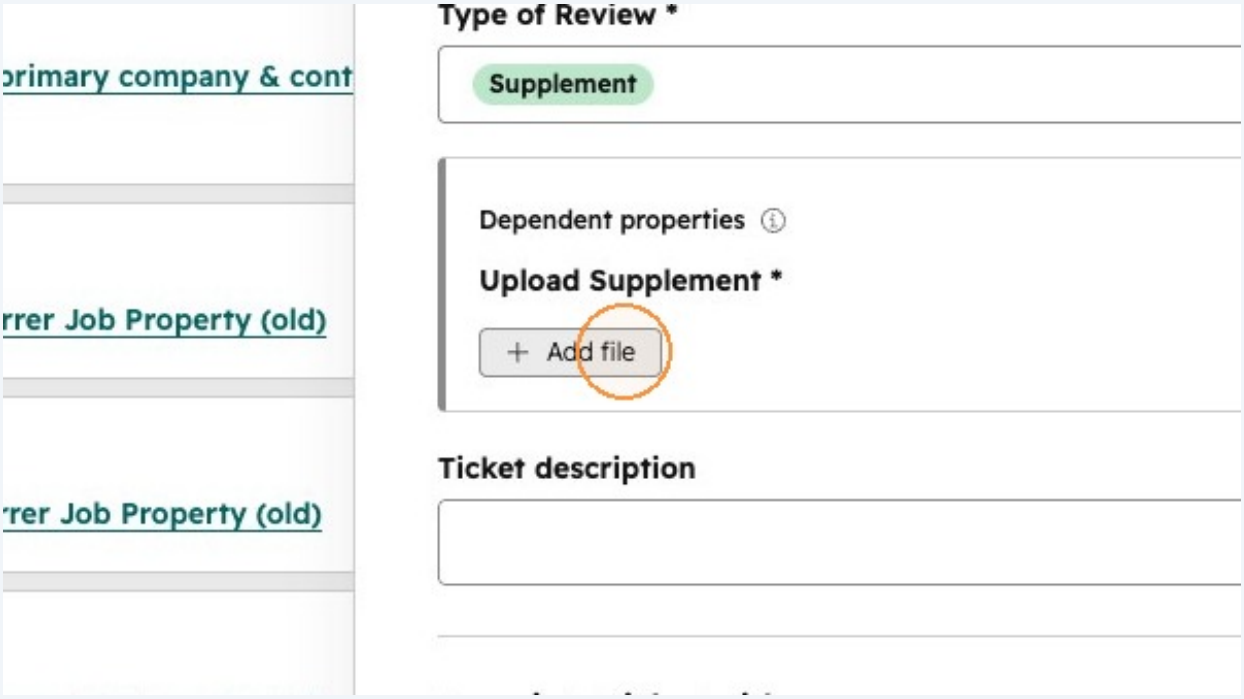
21 Click the "Number of Hours Manager Was On-Site" field and enter the number of hours the manager was on-site. Then go to Step 24



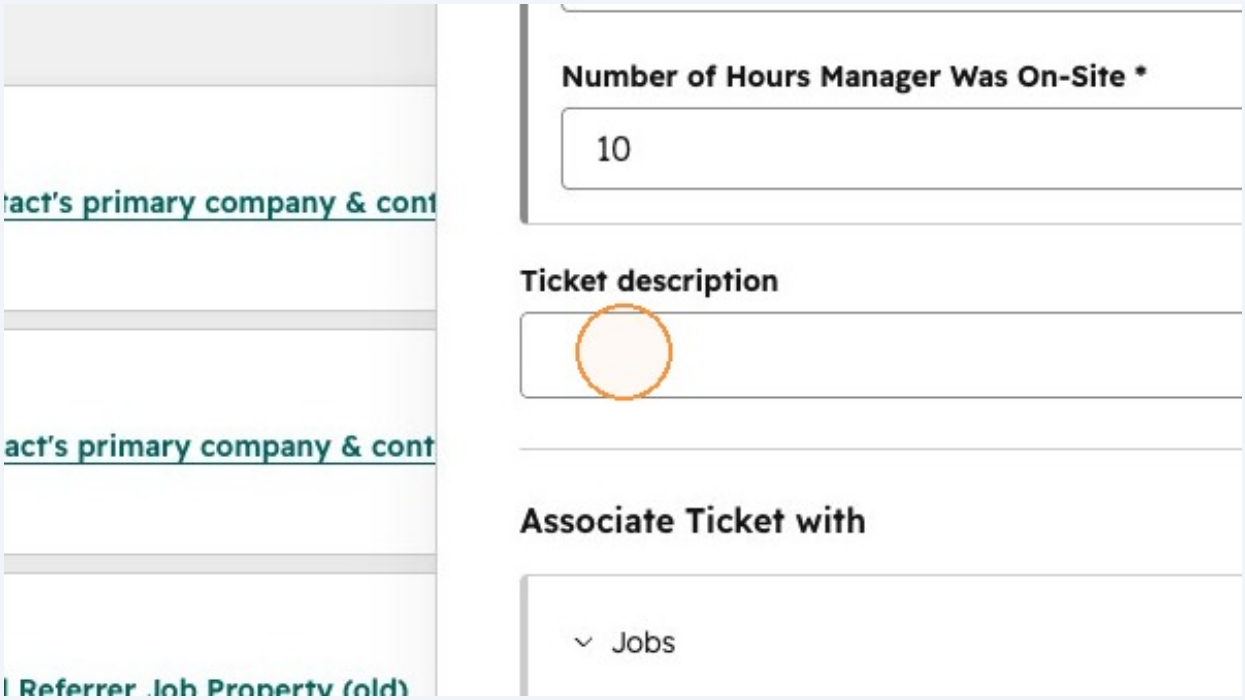
22 For Mobile Claims Reviews, under the "Mobile Claims" field, click "Add file" and upload the PDF file. Then follow steps 13-21



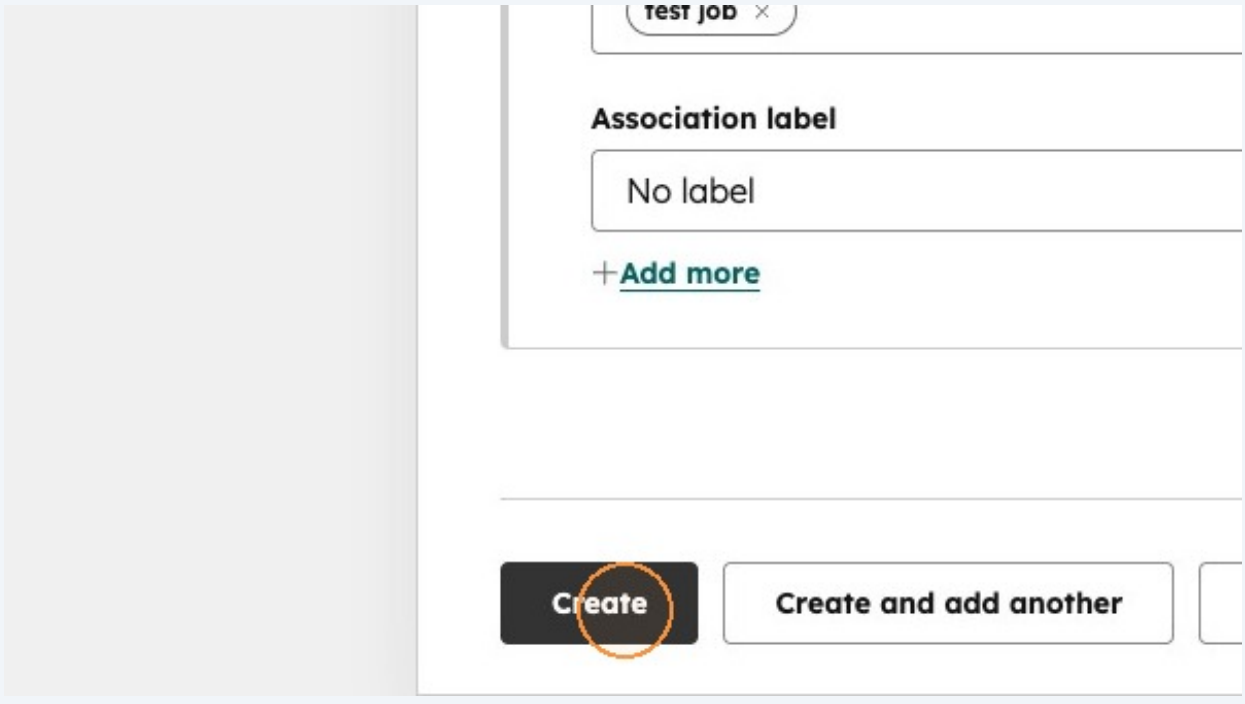
23 For Supplement Reviews, Under Upload Supplement, click "Add file" and upload the supplement file.



24 If you have any notes, click the "Ticket description" field and enter them.



25 Click "Create"



26 Our support team will review the estimate or supplment within 48 hours. Once the estimate is approved and any revisions are sent back, you must:

1. send the estimate to the adjuster within 24 hours.
2. Bill job in Quickbooks