## Job Tracker Professional

## Cloning a Job/Quote.



You are able to clone both a Job and Quote on Job Tracker Professional. This is useful for repeat work or to create a template Job/Quote to copy which then only needs minimal pieces of information added or amended.

	[Job A1380] Job Screen,					- 🗆 ×
	Job No: A1380 Invoice No: Not Issued			Job Status: Procedure Manual Update Status		
	Job Details	Client Details	Documents / Emails / SM	IS Reminders	Purchase Orders	Scanning / Drag N Drop
	Job Site Address and Contact	t Details	Assigned Staff	Job Details and Requirements		Job Details
	Address:	dure Manual Pick		Update Version: XXXX Details of the Update: XXXX		Pick     Site Visits     Drain Surve     Beceints
	Post Code:	Find Address Map	Assign Remove SMS			JT Online
	Site Contacts:	V	Required Skills			
	l elephone:			Parts and costings for Job		Adjust price by % 0 📑
	CRM Mobile:			Qty Part # Description	n	U Price £ Total £
	History Notes					
	Email:	Send				
	Website:	www	<u>A</u> ssign <u>R</u> emove			
	Additional Job Details Marketing Source	Quote/Estimate	Contact			AT C. Crass S. Dalamas S
	Product / Service	Est LeadTime (Days)	Duration Days	<ul> <li>Materials Manual Item Delete Ite</li> </ul>	em Time Sheets 0.00 0.	00 0.00 0.00
		Shipping Bef	Deposit Amount S	Job Dates Search Data A	Appointments Sage Line 50	JT Mobile Data Forms
	Danni Perotti			Received Date Start	Action By	1
	Job Category	Purchase Ref	Created By	16/05/2017	09	
	Knowledge Base	/	Dannielle Perotti	Deposit Inv Sent Deposit Paid	Engineer Notes	Zoom
	Prefered Due Date Job Notes					
	Dariniele Felotit, 16/03/2017, 12:20:03 Procedule needs     Completed     Invoiced       documenting     Image: Completed Complete					
				Start Date End Date	SLA	Remaining
	Process Het		Zoom	09	09	
	Load Job:					ad from Estimate. No: N/A
	Prev Next	Add Notes		Job Finished Awaiting Paymen		ed from Estimate INO. N7A
	CREATE NEW JOB	FIND JOB COMPLETE		CREATE E DELETE INVOICE THE JOB		EXIT
Open Job Tracker Professional on your PC and click on either 'Jobs' or 'Quotes'.						
Either create and save a new job/quote that you want to use as a template, or search for and load the job or quote that you wish to copy.						
Job/Quote has loaded, hold down the 'Ctrl' key on the keyboard and right click on the Job Number, this will be displayed in bold, black writing in the top left-hand side of the page. A pop up will then appear asking you if you would like to clone the job, click yes.						
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