

# 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.

The screenshot displays the Job Tracker Professional software interface. At the top, it shows 'Job No: A1380', 'Invoice No: Not Issued', and 'Job Status: Procedure Manual'. The interface is divided into several sections: 'Job Site Address and Contact Details', 'Assigned Staff', 'Job Details and Requirements', and 'Additional Job Details'. The 'Job Site Address and Contact Details' section includes fields for Company Name, Address, Post Code, Site Contacts, Telephone, Mobile, Fax, Email, and Website. The 'Assigned Staff' section has 'Assign', 'Remove', and 'SMS' buttons. The 'Job Details and Requirements' section includes 'Update Version: XXXX' and 'Details of the Update: XXXX'. The 'Additional Job Details' section includes 'Marketing Source', 'Quote/Estimate', 'Contact', 'Product / Service', 'Est LeadTime (Days)', 'Duration Days', 'Job Booked By', 'Shipping Ref', 'Deposit Amount £', 'Job Category', 'Purchase Ref', 'Created By', 'Preferred Due Date', 'Job Notes', 'TT/Process Job No', and 'Process Ref'. At the bottom, there is a toolbar with buttons for 'CREATE NEW JOB', 'FIND A JOB', 'JOB COMPLETE', 'CREATE JOB SHEET', 'CREATE INVOICE', 'DELETE THE JOB', 'SHOW SCHEDULER', and 'EXIT'. A red arrow points to the 'Job No: A1380' field in the top left corner.

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.

