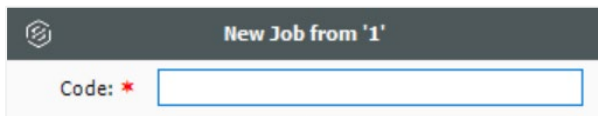## COPY AN EXISTING JOB

1. Click the **File** tab on the **Estimate** landing page.

2. From the left side panel, select **New**, then select **Existing Job**.

   Scratch | Template | Existing Job | Bid Wizard

3. The Job Register displays a list of your existing projects; select your Job and click **OK**.

4. On the New Job dialog, in the Code field, type the code for the job.

   New Job from '1'
   Code: *

5. If needed, make sure the **Copy Cost Details** checkbox is selected.

   ☑ Copy Cost Details

6. Uncheck the check for **Copy PBS Changes Log**.

   ☐ Copy PBS Changes Log

7. Click **OK** to create the new job.

USE THE BID WIZARD

1. To open the Bid Wizard, click the **File** tab on the Estimate landing page.

2. From the left side panel, select **New**, then select **Bid Wizard**.

   Scratch | Template | Existing Job | Bid Wizard

3. Enter a **New Code** and **Description**, then click **Next**.

   ⦿ Create a new job:
   New Code:
   Description:
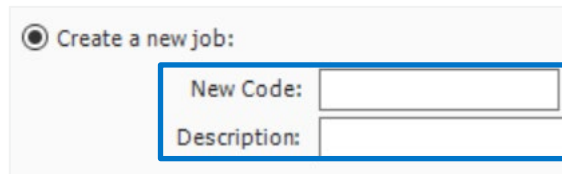
4. Choose **Select cost items** and click **Next**.

   ⦿ **Select cost items** from a source Job folder.

5. For each option, select either from Master data or the job you're copying from, then click **Next**.

   ⦿ Copy from Master Job Properties
   ○ Copy from source job

6. If you select **Copy from source job** under Unassigned Cost Items and Markup, you can also select the **Copy Markup** box.

   Unassigned Cost Items and Markup
   ○ Copy from Master CBS
   ⦿ Copy from source job
   　☑ Copy Markup
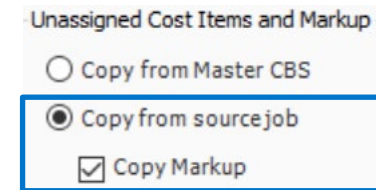
7. Click **Next**.

8. Select the job you want to copy from the Source Job drop-down list, then click **OK**.

   Source Job: [Select Source Job] ▼

9. Find and select your Job ► Click **OK**.

10. Check the Include box for the items you want to copy.

11. Click **Finish** to add the new job.

    < Back | Finish | Cancel

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COPY ESTIMATE DATA USING EDIT COMMANDS

1. Select File ▶ Open to open two different jobs.

2. Open your Job (if you do not still have it open).

3. Open the **Cost Breakdown Structure (CBS)** for each job.

Cost Breakdown Structure (CBS)

4. Since you have both jobs open and they are in their own application window, align them to be side by side by using the **minimize icons** of each job or utilizing Windows align functionality.

5. Align the CBS window for each job side by side.

6. In the CBS of one of jobs, select the cost item(s) to copy and press **Ctrl+C**.

7. In the CBS of the other job, click the row header on the first blank register row and press **Ctrl+V** to paste the cost item(s).

USE THE CBS BID WIZARD

1. On the **CBS** of a job, create a new cost item by typing in a description on the bottom row.

CBS Position Code	Description
	Cost Item

2. Highlight the **New** row.

3. To open the CBS Bid Wizard, click the **Bid Wizard** icon on the **More Actions** tab.

Bid Wizard

4. Select a job to copy from the Source Job drop-down list for your new item.

5. From the Source Job drop-down list, select your Job.

6. Click in the **Source CBS Position Code** column on the New Cost item row.

Source CBS Position Code

7. Select a cost item to copy, then click **OK**.

8. Click **Finish**, then click **OK**.

CREATE A NEW JOB SNAPSHOT

1. From the Snapshots form, select the **Create Snapshot** tab.

2. If an existing job is open, select **OK** to save.

3. From this dialog box, you can add a Snapshot comment.

4. Select a user access setting.

5. Click **OK** to create the snapshot.

LOAD A JOB SNAPSHOT

1. Click the **File** tab to open the Backstage View, then select **Snapshots**.

2. Select the **Snapshot Register** tab.

Create Snapshot   Snapshot Register
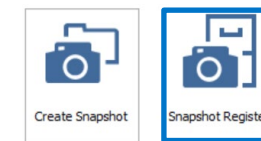
3. Click the icon next to the desired job to display the list of snapshots.

→ + Training Job

4. Right-click on the individual snapshot you want to load and select **Load**.

Load