


Job Save & Copy

When a job already resides in your database a new job can be created quickly by using the **Save & Add Copy** feature.

IMPORTANT: If your application is setup to manage multiple Offices (Divisions, Sites or Locations) please log into all Offices only when the Job will be saved to a different Office.

Navigate to the job using your preferred search method; (Job by Contact, Job by Address, Job by ID, etc.) within the Job Detail page click on the **“Save & Add Copy”** button located to the bottom left of the page.



+ Image

Amy Lou Matthews, Owner 904-555-2626 - Cell, 904-333-1111 - Home dawn@servicesoftwareinc.com
Kaden Matthews, Owner 904-444-1717 - Cell 904-333-1111 - Home
 2016 Turtle Bay Cove, Ponte Vedra Beach, FL 32082 [Show Map](#)

Tasks: 3 Incomplete: 2 Due Today: 0 Overdue: 0 Future: 2 [Add](#) +

Documents: 1

Correspondence: 0 [Add](#) +

Work Orders: 0 Open: 0 Due Today: 0 Overdue: 0 Review: 0 Repair: 0

of Lists:
Average Age:
Total Costs:
Estimate:
Over/Under:

Job Snapshot

[Detail](#) |
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Project: Turtle Shores [Show Map](#)

Lot #:

ID: TS16-2016 Red Flag

Job Name: Custom Job Name *Default is Primary Homeowner Name

Address: 2016 Turtle Bay Cove

Building:

Unit:

City: Ponte Vedra Beach State: FL Zip: 32082

County:

Warranty Rep: Dawn Bryant

Project Mgr: Debra LaBrosse

Coordinator: Choose an Employee

Status: Active

Lockbox/Code:

Storage #:

Name/Date/Time Stamp

Notes:

Save

Save & Add Copy

Add List

Cancel

Job Save & Copy

After clicking on the **Save & Add Copy** button the page is redirected.


Make any changes to the Detail of the Job, such as the Project, Lot #, Job ID, Job Name, Address, Warranty Rep (Supervisor), Project Mgr (Staff), Coordinator (Staff 2) and Custom Job Fields if applicable. Once the adjustments are complete, click the **Save** button to create the new job or the **Cancel** button if you decide to not proceed.

After the job has been copied then you may need to apply the following additional details (if applicable).

- ✓ Homeowner information by clicking on the Homeowners Tab.
- ✓ Apply the Warranty Dates by clicking on the Job Snapshot (*blue ribbon that display across the middle of the job detail page*).

Sample of a completed copied job.

Job Name: LaShawn & Carlee King	Job ID: TS16-2017	Status: Under Warranty
		Close Date: 11/07/2016



LaShawn King, Owner 904-333-8888 - Cell, 904-111-4444 - Home dani@servicesoftwareinc.com
Carlee King, Owner 904-888-3333 - Cell 904-111-4444 - Home dawn@servicesoftwareinc.com
 2017 Turtle Bay Cove, Ponte Vedra Beach, FL 32082 [Show Map](#)

[+ Image](#)

<p>Tasks: 3 Incomplete: 3 Due Today: 0 Overdue: 1 Future: 2 Add +</p> <p>Documents: 0</p> <p>Correspondence: 0 Add +</p> <p>Work Orders: 0 Open: 0 Due Today: 0 Overdue: 0 Review: 0 Repair: 0</p>	<p># of Lists:</p> <p>Average Age:</p> <p>Total Costs:</p> <p>Estimate:</p> <p>Over/Under:</p>
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[Job Snapshot](#)

Detail	Homeowner (2)	Requests	Schedules	Tasks (3)	Plan	Vendors	Costs	Correspondence
Documents Document Merge Quality Processes								

Project: Turtle Shores Show Map	
Lot #: <input type="text"/>	<input type="checkbox"/> Red Flag
ID: TS16-2017	<input checked="" type="checkbox"/> Custom Job Name *Default is Primary Homeowner Name
Job Name: LaShawn & Carlee King	
Address: <input type="text" value="2017"/> <input type="text" value="Turtle Bay Cove"/>	
Building: <input type="text"/>	
Unit: <input type="text"/>	
City: Ponte Vedra Beach	State: FL Zip: 32082
County: <input type="text"/>	
Warranty Rep: Dawn Bryant	
Project Mgr: Debra LaBrosse	
Coordinator: Choose an Employee	
Status: Active	
Lockbox/Code: 2017-16	
Storage #: 587	