## Copying a job.

Copying a job.

When a known customer brings his (known) car in for a new job, there is an easy way to copy his / her data.

First you have to look up the existing job(s), using the filter on the left:

PlanManager	1					H	telp	Wo	rkshop	Job	Planning	Report	Ţ	aintenance	System	Car Fleet	Invoici
Back Job List	Order list	Deliverie	es Of	fer Re	quests	Stock Scale	Vat Book	DMS	Albatros	Carpass	Audatex Audatex	Claims				English (United H	Kingdom)
Reset	Ex	port		Nev	v	Quick appoin	itment 2 ite	ems								Previous	1   N
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ab12wer			<		1												
type a person name			$\square$														

In the job list you will see this symbol  ${}^{igside{D}}$ , when you click this you'll see next screen:

\$		Job T		Regist
*	ß	1500	Copy claim	× AB12V
<b>*</b>	ď	1500	Number of copies * 1	AB12V
			dot 🖂	
			<ul> <li>pocuments (4)</li> <li>Salected</li> <li>All pictures</li> <li>Image: Door FL</li> <li>Repair Description: Repair &amp; Paint</li> <li>Estimation 1 £ 1328.02 (Planning, TEST)</li> </ul>	
			Page 1 / 2 (c) 2024 InSyPro <christof@insypro.com>   2024-05-06 14:42</christof@insypro.com>	
			(c) 2024 m3yrro <cm storemsypro.com="">   2024-03-00 14.42</cm>	

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Here you indicate wether you want to copy the job (car + owner + insurer, etc) or job + documents (you can select the pictures you want to copy) and eventually one

of the estimations. Once you click "Copy claim" with the ticked info.

Copy claim

a new claim is created

Back Job List	Order list	Deliverie	es O	ffer Ree	quests	Stock	Scale	Vat Boo	k DM	S Alba	atros	Carpass	Audatex	Audatex Claim	S				English	(United Kingdo	om) 🔽
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type a person name			<																		

Unique solution ID: #1603 Author: Jean-Marie Last update: 2021-11-10 15:50

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