GETTING STARTED





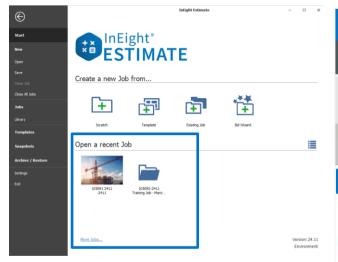
Workflow tabs Library You will move from left to right on the workflow tabs as you enter your data for the project 曲 Training Job - Estimate 血 Ħ File More Actions Setup Estimate Ouote System Integrations Actions Help **Backstage View** Price Labor o ## Equipment **Job Properties** Job Properties Foundation Pay Item & Bid Wizard Resources Resource Cost Item Standard Reports Materials drop-down Setup Data * Assemblies Assemblies Tables Proposal Initialize Assemblies Resources Reports

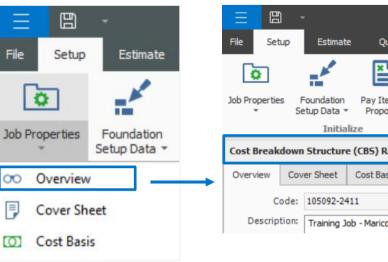
A OPEN A JOB FOLDER

1. From the Backstage view, under the **Open a recent**Job section, double-click on your job.

B OPEN FORMS

- 1. Select **Overview** to open the Job Properties form.
- 2. Each form opens in its own tab within the active job folder.





QUICK GUIDE

GETTING STARTED



MOVE A COLUMN

1. To move the column, click on the **column header** and drag and drop it.

HIDE A COLUMN

- 1. To hide the column, click on the **column header** and drag it down until a black X appears, then let go.
- 2. To unhide a column, right click on any column header and select **Column Chooser**.



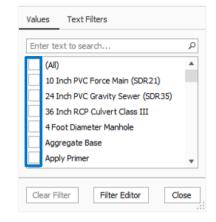
3. Find the **column** you want to unhide and drag-and-drop it to the location where you want it to go.

SORT A COLUMN

 Click on the column header to sort the column in ascending order . Click a second time to sort in descending order .

FILTER A COLUMN

- 1. Hover over the **column header** for the **filter icon** to appear, then click the con.
- 2. Make your selection, then click **OK**.



- 3. To add expand the filter using And/Or functionality, click **Edit Filter**, in the lower right corner.
- 4. To clear the filter, click on Clear Filter ➤ Close.

GROUP COLUMNS

1. Click on the **column header** and drag it into the grouping area.

Drag columns here to group

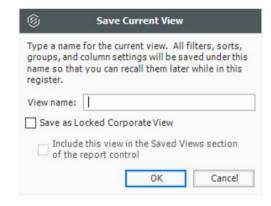
- 2. Continue to drag additional columns into the group.
- 3. To ungroup, right click in the grouping area and select **Clear Grouping.**

CREATE A SAVED VIEW

1. Click the **Saved Views** drop-down menu ► then click the **save icon**.



2. Enter the View Name, then select OK.



FIND FEATURE

1. Click the picon.

* Enter text to search...

2. Click on the icon for more options.

Always Expanded

Search in Selected Column Only