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Using the Project Manager and Multiple Tabs Effectively

The Project Manager is a great tool to organize and sort your eQuote projects. One way is to sort the columns in "Ascending" or "Descending" order by clicking the header. The example below shows another way to sort, which is sorting by the Customer Quote number. You can add or remove columns and change the column order using the "**Change View**" button. We encourage you to take the time to customize the screen look and layout that you prefer best.

Several other filtering options allow you to see only certain project types, projects with one or more specific statuses, projects modified in a certain time range, projects created by you or someone else, and you can add the normally hidden archived projects and test projects. If you are working with a lot of projects, or just want to get directly to the correct line item, you can search for a term used in the Project Name or Quote Number. Projects are archived automatically after a year from the last modified date, so it you don't see a project, be sure to check the "**Show Archived**" box and look again.
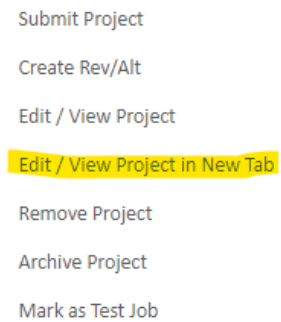
You can take some actions directly from the Project Manager without needing to open the project. Located in the tabs options at the top of the Project Manager, you can:

- Create a revision or alter a new base quote.
- Submit a project to your DSM, PC, or Estimator straight from the Project Manager.
- Remove projects that are no longer needed, which changes them to a "Removed" status. You can undo this for a short time using the "**Restore Project**" before they are deleted, via the right-click menu. See more about the right-click menu below.

The right-click menu is useful, especially when you have searched or filtered results in the Project Manager and you don't want to have to repeat those steps. You can preserve the search results and state of the Project Manager by remembering to right-click instead of double-clicking to open the project. This is especially helpful if there are multiple projects in a "tree" of revisions or alternates. To do this, simply select the "**Edit / View Project in New Tab**" button to open this project in another tab in your browser. Even though you can have the same project open in multiple tabs, please do not attempt to make changes in more than one. However, it can be useful to look at an input screen or a drawing or the 3D Rendering in one tab as a reference while you fill out information on another tab.

Submit Project

Create Rev/Alt

Edit / View Project

Edit / View Project in New Tab

Remove Project

Archive Project

Mark as Test Job

In addition, you can archive and unarchive projects here, along with marking projects as test jobs and setting them to no longer be test jobs. Several functions can be accessed here, as well as at the top of the screen: Add Project, Submit Project, Create Rev/Alt, and Remove Project.

Find your preferred method and start some new eQuote habits today!