

## Save data entry time using the *Duplicate* button

You can save valuable time when entering client data by using the *Duplicate* button.

When you add or revise data within a category, click **Duplicate** to create a copy of the previous entry. Open the duplicated entry, and then make your edits. Using the Duplicate button eliminates the need to re-enter all the information from the beginning. The *Duplicate* button is available in the following categories: *Incomes*, *Expenses*, *Assets*, *Loans*, and *Strategies*.

The screenshot shows the 'Proposed Plan (2005) Settings - Base Plan' window. The 'Lifestyle' tab is selected, and the 'Employment' sub-tab is active. A text box provides instructions: 'Insert the pre-retirement expenses incurred by the family. Do not include estimated expenses during retirement as these are handled by the Retirement Goal. Also, Loan and Mortgage payments should be entered in the Loans Category.'

Description	Monthly Amount	Applicable Period	Indexed by
Golf Membership (Justin)	\$300	Jan 1 2002 to Dec 31 2020	3.00%
Misc. Living Expenses (Justin)	\$5,000	Jan 1 2004 to Dec 31 2020	3.00%
Vacations (Justin)	\$250	Jan 1 2002 to Dec 31 2020	3.00%

At the bottom of the window, several buttons are visible: 'Insert Regular...', 'Insert Lump Sum...', 'Delete', 'Edit...', 'Duplicate' (circled in red), '<< Back', 'Next >>', 'Cancel', and 'OK'.