

# Module 3:

## Selecting Trades

1

**\*NOTE- Confirm trades with Lead Estimator for project**

- Under “Trade/CSI Details” on the right-hand treeview, click “Update Trades”

The screenshot shows a software interface with a treeview on the right. The treeview has three main sections: 'Primary Contact', 'Package Information', and 'Trade/CSI Details'. Under 'Trade/CSI Details', the 'Update Trades' button is circled in red. The 'Update Trades' button is located at the bottom of the treeview, next to the 'View Coverage Report' button. The text 'There are currently no trades' is visible below the treeview.

2

- A new window will open, select trades by division, or search by keyword.

- Click “Search”

The screenshot shows the 'Update Trades' dialog box. It has two main sections: 'Select a division or search by keyword' and 'Add trades to the package'. In the first section, the 'By Division' dropdown menu is circled in red, and the 'Search' button is also circled in red. The second section contains two tables: 'Select from:' and 'Selected:'. The 'Select from:' table has columns for 'Code', 'Trade Name', and a separator. The 'Selected:' table has the same columns. There are four arrows between the tables: a double right arrow, a single right arrow, a single left arrow, and a double left arrow. At the bottom, there are 'Cancel' and 'Save' buttons.

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- Double-click on the appropriate choice in the “Select from” box
  - The trade will now appear in the “Selected” box

- Click “Save”

The screenshot shows the 'Update Trades' dialog box with the following elements:

- Step 1:** 'Select a division or search by keyword'. It includes a 'By Division' dropdown menu and a 'Search by Keyword' text box containing 'plumbing'.
- Step 2:** 'Add trades to the package'. It features two tables: 'Select from:' and 'Selected:'.
  - The 'Select from:' table has columns 'Code', 'Trade Name', and '#'. It lists '22DIV PLUMBING (All Codes)', '018616 Plumbing Performance Requir...', and '018919 Site Plumbing Utilities Perform...'. The '018919' row is highlighted.
  - The 'Selected:' table has columns 'Code', 'Trade Name', and '#'. It lists '220000 Plumbing' with a value of '208' in the '#' column.
  - Between the tables are navigation buttons: '>>' (add), '<<' (remove), and '<>' (toggle).
- At the bottom right, there is a 'Save' button circled in red.
- At the bottom left, there is a 'Cancel' button.