Clone A Plan

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Clone Plan

If you would like to add a plan which is very similar or identical to another plan, you can clone the original plan rather than creating a new plan and re-entering the information. Cloning a plan will copy the checklist answers of the selected plan to a new plan for an existing company that you have created on the system. If you would like to add the plan to a new Company, you will need to create the company prior to cloning the plan. You will not need to create a new plan, which will be done by the Clone Me feature. To clone a plan, simply navigate to the **Edit Plan** screen by either selecting the plan in the Navigation Bar, or from the Home screen. In the Plan Menu click **Clone Plan**, then in the next screen, select a company to associate with the cloned plan.