

SALES STUDIO CONFIGURATION SAVE A COPY OF (CLONE) A SALES PACKAGE

When you are creating a new Sales Package which incorporates similar items to a package *already* on the system, you can save time by *cloning* this existing package. The **Save Copy** functionality in Sales Studio creates a *clone* or *copy* of the original record with all the details except for the *Package Code*, which needs to be adjusted before the copy can be saved.

The **Save Copy** button is currently 'active' from the *Sales Package Maintenance: Edit product package* screen, via the **Edit** button and the *View Sales Package* screen, via the **View** button.

Ribbon Access: Sales Studio > Configuration > Sales Packages



SELECT SALES PACKAGE TO BE COPIED

- 1. The *Sales Packages* listing screen will open.
- 2. Select the *row* of the package to be *cloned* / *copied*.

SAVE COPY VIA THE EDIT BUTTON

3. Click on *Edit*.



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- 1. The *Sales Package Maintenance: Edit product package* screen will open.
- 2. Here you can view the Sales Package *information*
- 3. and the *details* of the items currently linked to the package.
- 4. Click on *Save Copy*.

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CHANGE PACKAGE CODE

1. An *Input Validation* message box will pop up warning you to correct this client-side data:

Please change the Package Code to continue.

2. Click on OK.

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- 1. Go to the *Package Code* field and change it so that this copy has a <u>unique reference number</u> from the package it is being cloned from.
- In this example, the text 'COPY' has simply been added to the original Package Code.
- 3. Now you can click on *Save Copy*.



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- 1. The page will *refresh* and you will return to the *Sales Packages* listing screen.
- 2. A *Sales Packages Processing* message box will pop up informing you; *Sales Package saved successfully.*
- 3. Click on OK.





- 1. The cloned package can now be viewed in this screen.
- 2. You will note that the unique *Template Code* has been saved so that this *cloned* package <u>stands out</u> from the *original* package, even though all the other package information and details remain the same.
- 3. You can now <u>Edit</u>, <u>Delete</u> and <u>View</u> this copied package, as and if required.



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