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*.

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*.

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*.

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

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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