

We are currently updating our site; thank you for your patience.

## SALES STUDIO CONFIGURATION

### SAVE A COPY OF (CLONE) A SALES PACKAGE

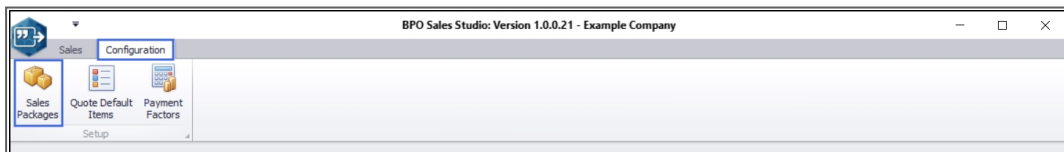
When you are creating a new Sales Package which incorporates similar items to a package already on the system, you can save time by **cloning** this existing package. The **Save Copy** functionality in Sales Studio creates a **clone** or **copy** of the original record with all the details except for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

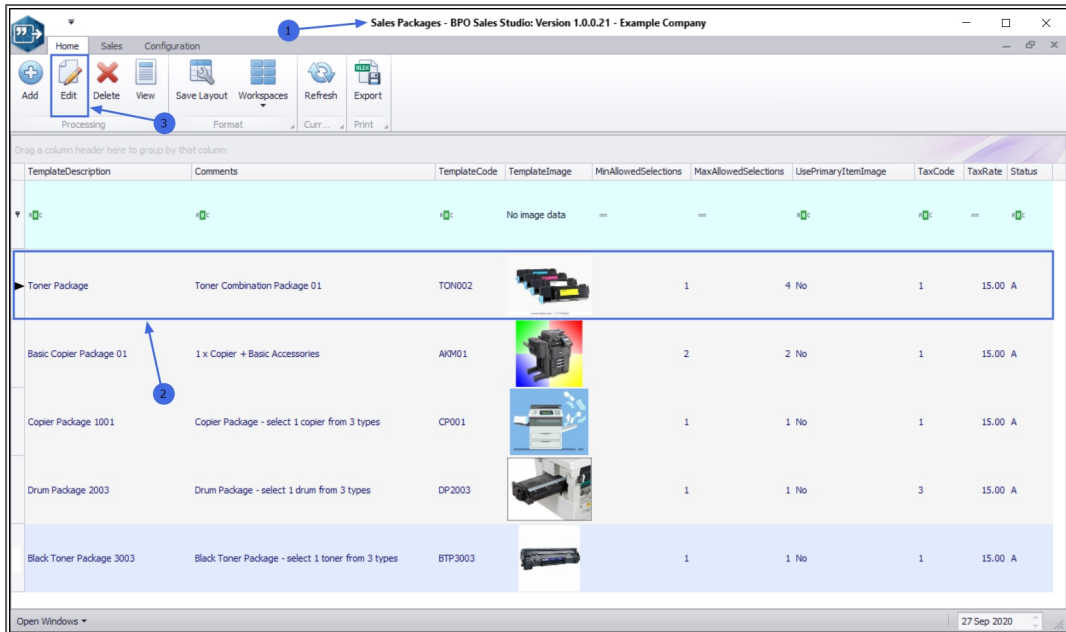
---

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

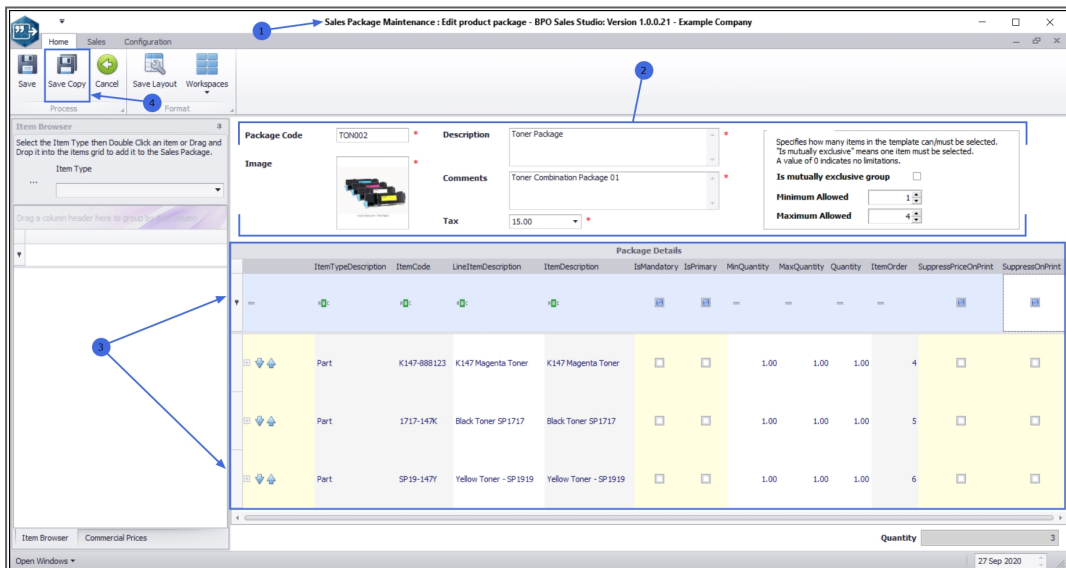
### SAVE COPY VIA THE EDIT BUTTON

---

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**.

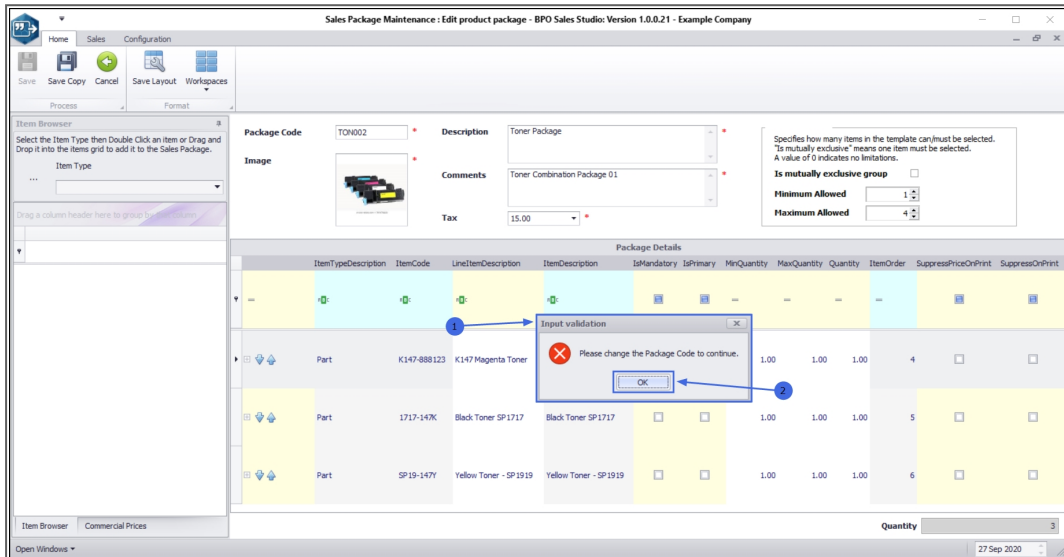


## CHANGE PACKAGE CODE

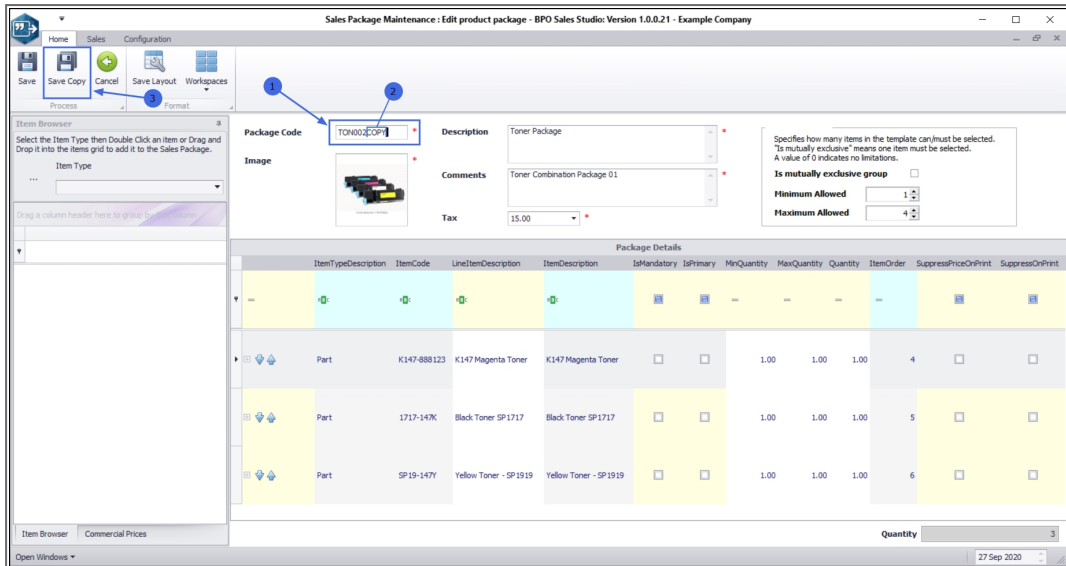
1. An **Input Validation** message box will pop up warning you to correct this client-side data:

**Please change the Package Code to continue.**

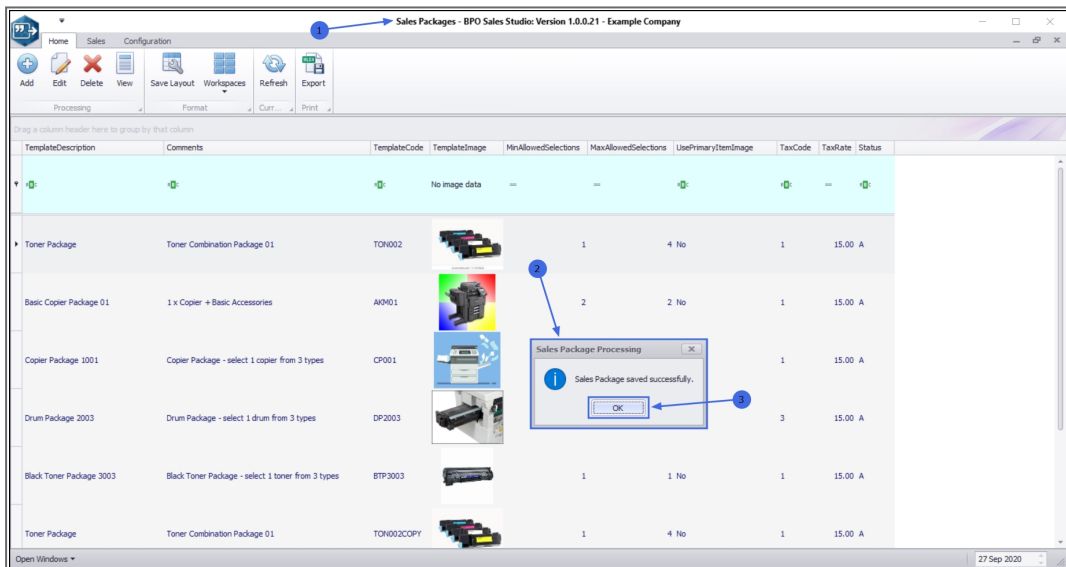
2. Click on **OK**.



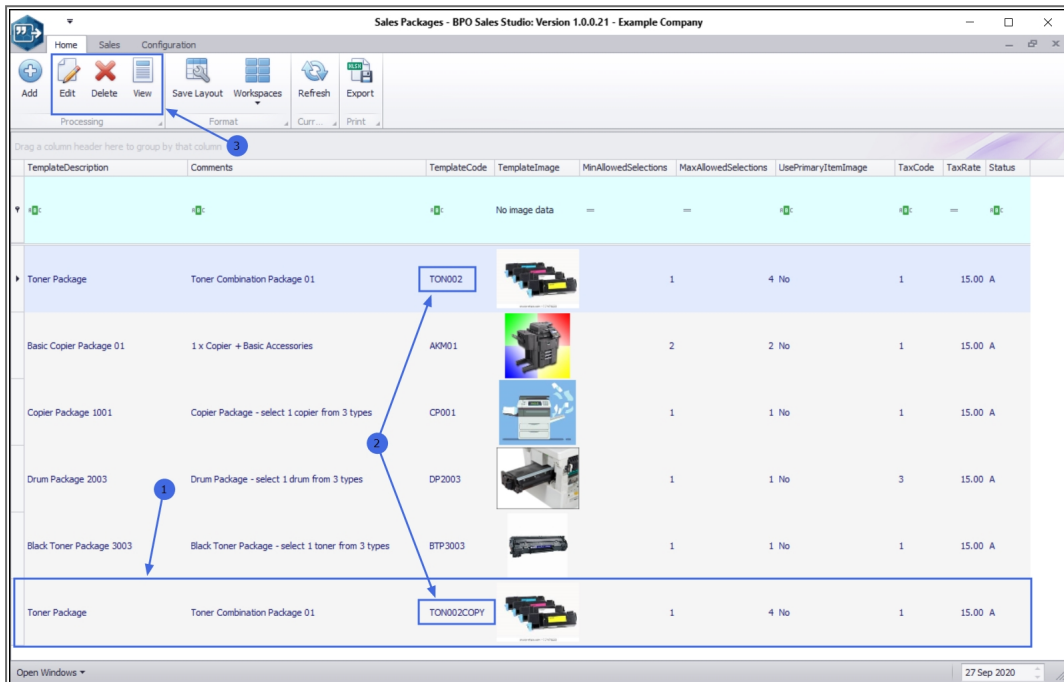
1. Go to the **Package Code** field and change it so that this copy has a unique reference number from the package it is being cloned from.
2. In this example, the text '**COPY**' has simply been added to the original Package Code.
3. Now you can click on **Save Copy**.



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 stands out from the original package, even though all the other package information and details remain the same.
3. You can now [Edit](#), [Delete](#) and [View](#) this copied package, as and if required.



MNU.165.006

