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**.

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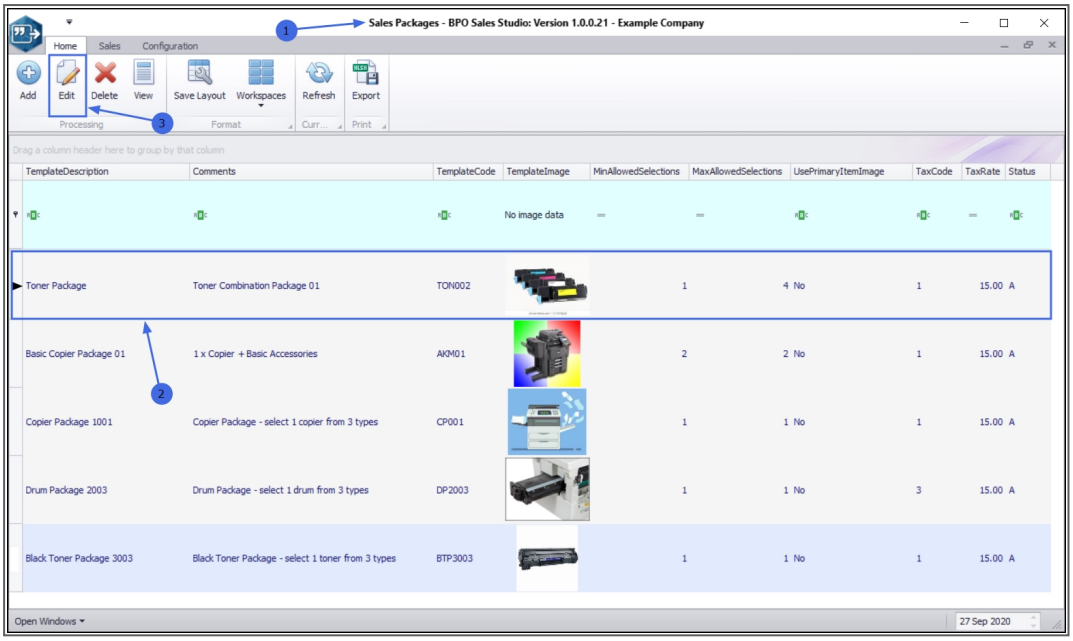
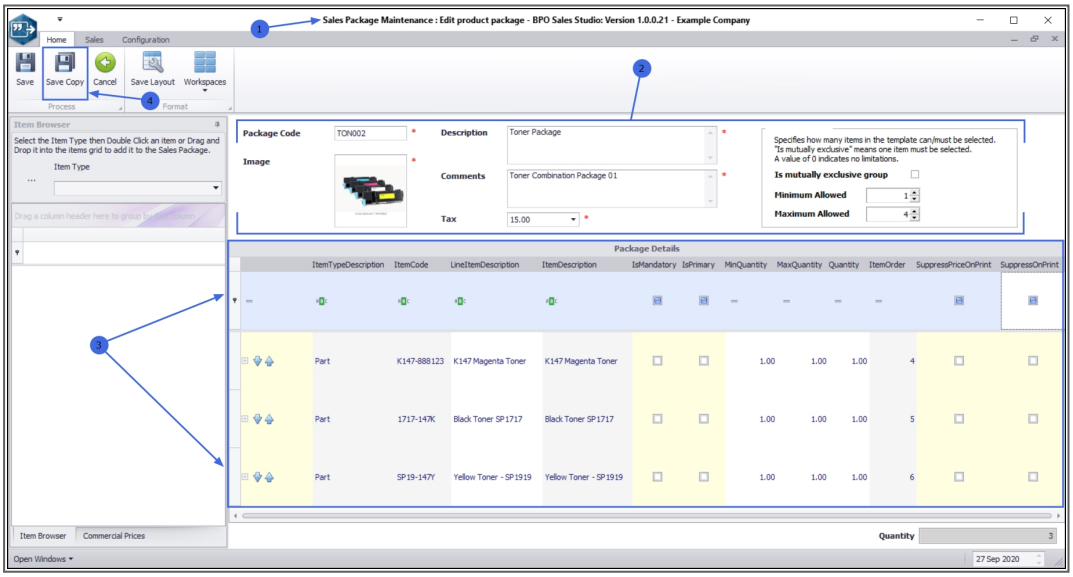


1. The **Sales Package Maintenance: Edit product package** screen will open.
2. Here you can view the Sales Package **information**
3. and the **details** of the items currently linked to the package.
4. Click on **Save Copy**.



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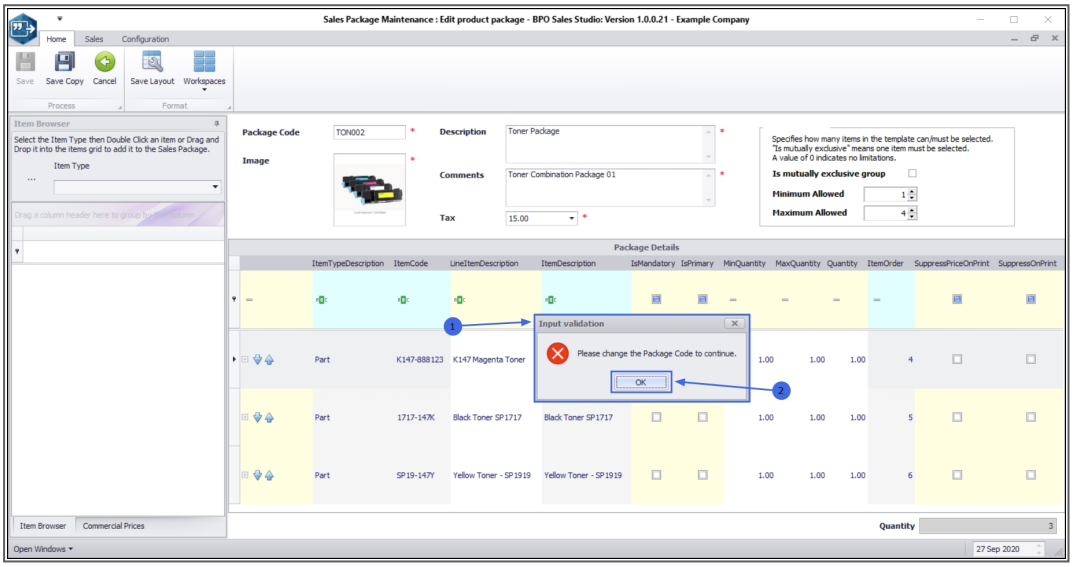
CHANGE PACKAGE CODE

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**.



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**.

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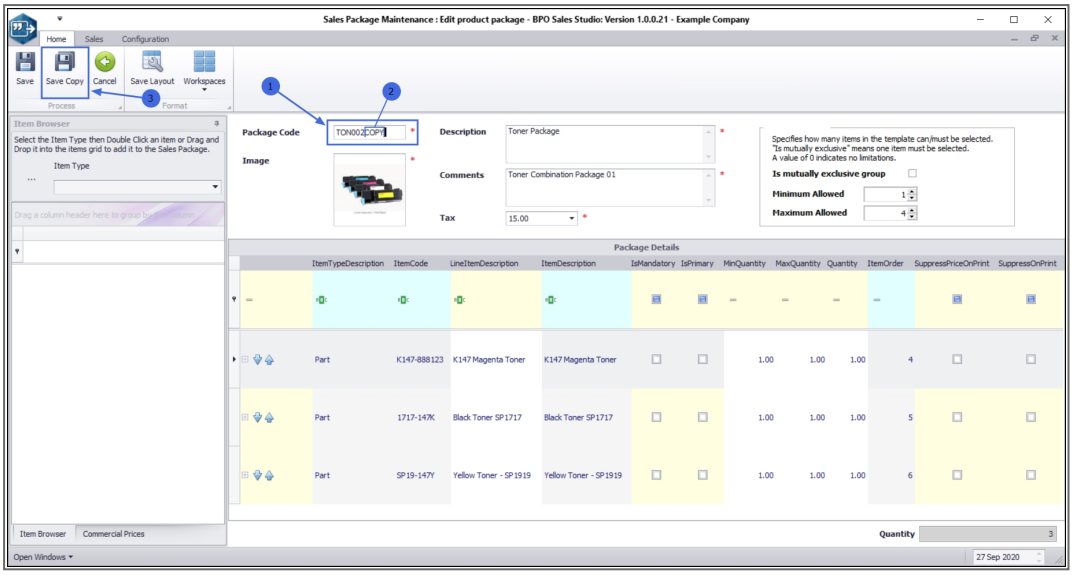
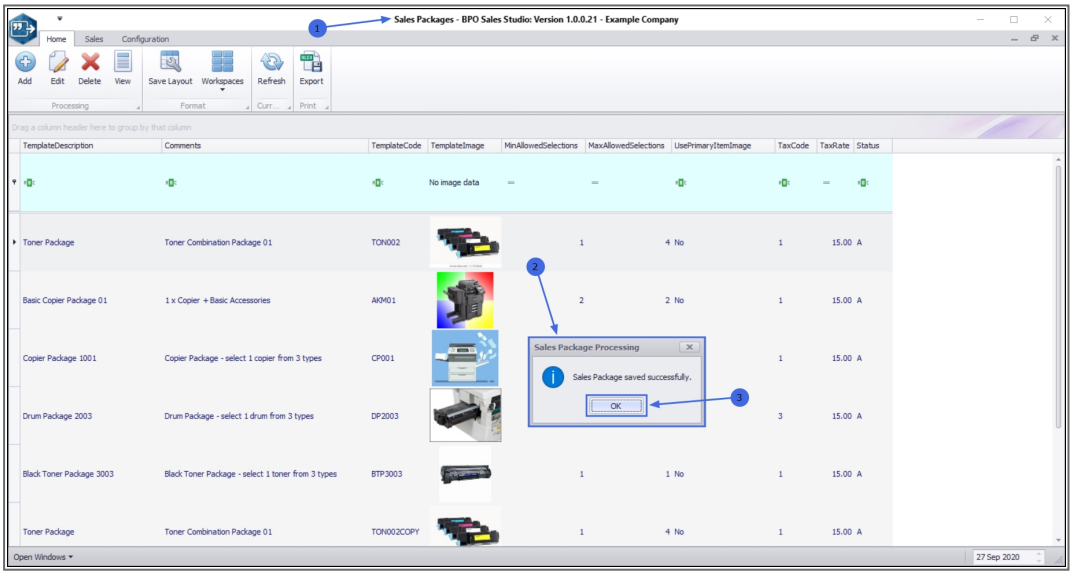


1. The page will **refresh** and you will return to the **Sales Packages** listing screen.
2. A **Sales Packages Processing** message box will pop up informing you;

   Sales Package saved successfully.
3. Click on **OK**.



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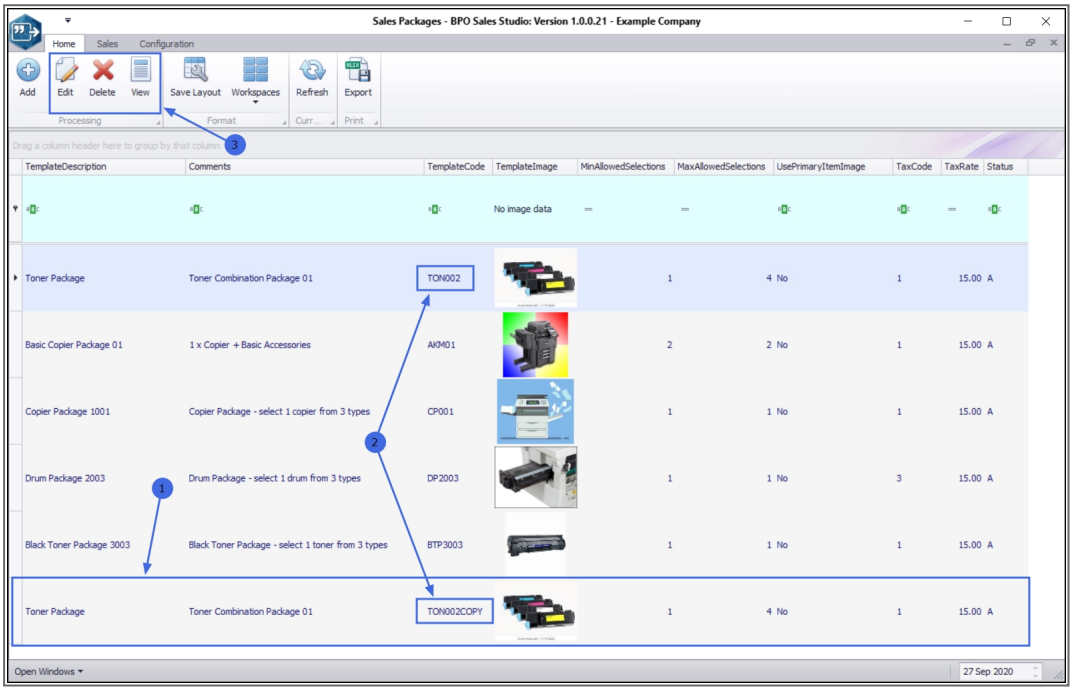
1. The cloned package can now be viewed in this screen.
2. You will note that the unique **Template Code** has been saved so that this cloned package stands out from the original package, even though all the other package information and details remain the same.
3. You can now Edit, Delete and View this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



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