

## Using Copy Options

You can quickly duplicate sales documents using BisTrack's available Copy options.

In this course, we demonstrate how to use the Copy From method with overwrite and the append selections.

We also introduce the Find Documents Copy function.

### **Copy From with the Overwrite Option**

Copy From with the Overwrite Option

The Copy From button is used to bring the contents of an existing sales document into the current document.

We begin by starting a new Quote.

The Copy From button is located on the toolbar. You will find it in this location for all types of sales documents.

Click the button.

Identify the Document type.

To select one other than Sales Order, click the drop-down.

The browse button changes to match the document type selected.

Use it to search and select the document to copy from.

If you know the document number, you can enter it here.

The number and customer name are displayed for the document selected.

Click Next to proceed.

A window opens showing the document details along with three copy options.

The first option copies the entire document into the current one and overwrites anything previously entered.

This includes replacing the current customer if one was selected prior to starting the Copy From process.

The system gives you additional selections below the product lines.

You can use prices from the document you are copying from or you can recalculate the prices by enabling the Recalculate prices check box.

When the originating document has special order products, the system can automatically create new specials for this document.

It's a best practice to create new specials.

You can also Consolidate positive quantities within sections.

For more information on consolidating, refer to the Training on Demand course "Using Sections and Summary Lines".

The Multiply qty by field allows you to enter a number that increases the quantities being copied by the multiplier specified.

To use the same quantities, leave this set to 1.

Click Next to proceed and then choose the Finish button.

A warning message to advise copying the entire quote will overwrite all existing lines is shown.

Click Yes to confirm proceeding with the copy.

BisTrack copies the entire document including the customer and any other details such as notes or special instructions that were in the originating document.

The system recalculates the line prices based on the current pricing for the customer and products.

It also creates a new special as noted by the digit increase in the special's product code.

### **Copy From with the Append Option**

Now let's look at how the Copy and Append method works.

Click the Copy From button.

Set the Document type and enter the document number.

Click Next.

Choose the option to Copy entire quote and append.

The area showing the document to copy from changes to allow scrolling through the individual lines.

Uncheck any lines you do not want copied.

When you are finished selecting lines and setting the available options, click Next, and then Finish.

The system asks you to confirm that you want to add all of the selected lines to the quote.

Click Yes to complete the copy.

The lines are appended to the current document without affecting the lines previously added or altering the customer.

The Copy selected lines only option works similar to this method except you have to check the lines you want to copy instead of unchecking the lines you don't want.

### **Find Documents Copy Function**

When you're doing repetitive orders with a customer, it's often easier to copy from an existing document rather than create a new one.

BisTrack makes this easy in the Find Documents view.

Let's see how the process works.

Find and select a document that you want to duplicate, open the right-mouse-button menu, and select the Copy option.

The system opens the Copy window and gives you the option to copy the entire document or selected lines.

We'll select Copy these lines.

BisTrack opens an empty checkbox adjacent to each line and section.

Enable the checkboxes for the lines that you want to copy.

When you choose a section header line, the system enables the checkboxes for all the lines in that section.

You have several Copy to options.

The first button always matches the type of document that you are copying from.

Since we're duplicating a quote, we'll select Copy to Quote.

The system copies the customer and selected lines into a new document.

You can now modify or add to it as needed.

The Copy options save you time and effort when entering sales documents.

You should now be familiar with the Copy From processes that overwrite or append information.

Similar functionality is accessible from the Find Documents window.

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