

POS – How to Copy a Quote or Order to New Order

How to Copy a Quote or “L” Type Order into a New Order

The line items from Quotes can be copied into new or existing quotes or “L” type orders. Likewise, the line items from “L” type orders can be copied into new or existing “L” type orders or quotes. When copying a quote or “L” type order, the original quote or order remains unchanged.

1. Write down the order number of the Quote or Order you wish to copy.
2. Open a new quote or “L” type order filling in the header screen information as needed. Press [Enter] past the order type (L or Q) to proceed to the Line Items screen.
3. Press [F12] for the Action box and “C” to Copy. A pop-up box displays as follows:

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07/12/2006                                POINT OF SALE                                MAN
Order: 3775                                Cust:                                ASH SALE
Column: B +/- 0.000% S +---- ACTION ----+ ICK UP Slp: GA Lines: 0
Tax: Y MO 7.3250% C | Exit | 07/12/2006 | Type: L
                    | pArtial ship |
                    | Backorder | kord TFL Sell Price | Total
                    | Copy |
                    | order Heading |

                    +-----+
                    | Order Num: _____ |
                    | Re-price Items: _____ |
                    | Re-cost Items: _____ |
                    | Re-price Alternate: _____ |
                    | Use Selling as List: _____ |
                    | Price Adjust: _____ |
                    | Copy Backorder Qty: Y |
                    | Copy Job Label Flag: N |
                    +-----+
__ Qty: 1 Item: _____ Tax: Y Prc: _____
Stk: _ _ _ Room: _____ Flg: _ Cost: _____
Info: _____ Net: _ Disc: _____
Desc: _____ LBR : _
F2=TO QTY F3=INQUIRY F4=ALT/SUPER F7=UPC TOGGLE F8=AUTO TOGGLE TAB=TOTAL
    
```

Order Num: Enter the order number you wish to copy.

Re-price Items: “N” if you want the selling prices from the original order to copy to this new order. “Y” if you want to re-price all line items with the current price for the customer ID on the new order.

Re-cost Items: “N” if you want the cost for each item on the original order to copy to this new order. “Y” if you want to re-cost all line items with the current cost in the item master inventory file.

Re-price Alternate: “Y” if you want an alternate (substitute) item chosen during the copy order process to have the same price as the item on the original order. “N” if the current price for the alternate (substitute) item should be used during the copy order process.

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Use Selling as List: “Y” to use the sell price from the original order as the “List” price for this order. “N” to not use the selling price from the original order as the list price on this order. (Typical response is “N” for No. Not a commonly used feature.)

Price Adjust: Enter a price adjustment percentage to adjust the selling prices on the new order. For example, Price Adjust: -10.0000 will calculate the selling prices on the new order to be 10% less.

If you chose “N” to re-price items, the prices will be 10% less than the selling prices on the original order.

If you chose “Y” to re-price items, the prices on the new order will be calculated as 10% off the current sell prices.

If there will be no additional price adjustment, simply press the [Enter] key.

Copy Backorder Qty: Y is the default response. If the item is backordered on the order you are copying from, a “Y” response will automatically backorder the item on the new order (even if the quantity is currently available). A “N” response will not automatically copy the backordered quantity. If the quantity is not available when you copy the order, the INSUFFICIENT QAV prompt will display as the line item is copied. At this point, you can choose to special order, backorder, choose an alternate, etc.

Copy Job Label Flag: N is the default response because it is the response most often used. “N” tells the system to NOT COPY the number in the “Labels Printed” field for each line item from the original order to the new order. Tag-n-Trak tracks whether or not you printed job labels on a line item by line item basis. Responding “N” will allow you to print job labels for the new order (just as if you had typed in each line item rather than copying the order).

A “Y” response tells the system to copy the number in the “Labels Printed” field for each line item from the original order to the new order. If you already printed job labels for the original order, it will assume that job labels already have been printed for the new order. (You can print job labels for the new order using the “Selective Job” label print program.)

NOTE: There is a different procedure for **converting** a quote to an “L” type order. In this situation, the quote order type actually changes from Q to L. When the quote is converted, inventory is reserved or backordered for the line items. Once a quote is converted to an “L” type order, it cannot be changed back to a quote.