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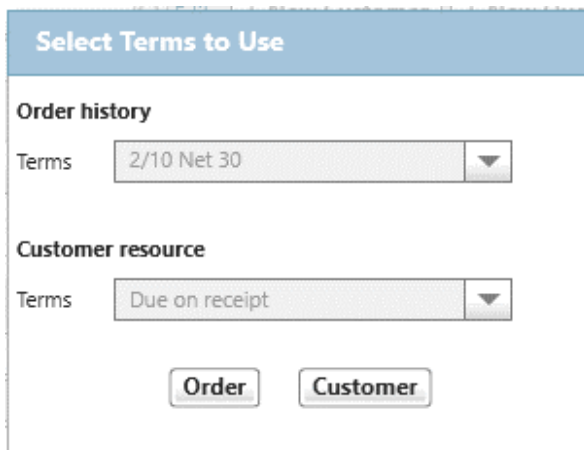
## How Do I Select Changes when Copying a Quote or Order?

Angie K - 2023-07-10 - in Quotes, Orders & Invoices

### **How Do I Select What Data is used when Copying a Quote or Order?**

The Copy function will compare various information related to the previous quote/order and various resources (customer, vendor, product, program). Popup windows will allow you to decide which information to populate into the new record. Below are a few examples:

#### **Terms Comparison**



**Select Terms to Use**

**Order history**

Terms  ▼

**Customer resource**

Terms  ▼

#### **Taxes Comparison**

**Select Taxes to Use**

**Order history**

| Code       | Description                    | Rate    |
|------------|--------------------------------|---------|
| 27007LDI01 | MN LEECH LAKE INDIAN RESERVATI | 6.8750% |

**Customer resource**

| Code  | Description  | Rate    |
|-------|--------------|---------|
| 27    | MN MINNESOTA | 7.0000% |
| 27133 | MN ROCK      | 0.0000% |

**Zip code table**

| Code       | Description                    | Rate    |
|------------|--------------------------------|---------|
| 27007LDI01 | MN LEECH LAKE INDIAN RESERVATI | 6.8750% |

## Ship To Comparison

## Price Comparison

**Select Price to Use**

**Product** WB12NEW  
12 OZ. WATER BOTTLE

**Order history**

Price

**Product resource**

Price

All comparisons will ignore upper/lower case. Text fields will also ignore beginning/ending spaces and punctuation.

Information not being compared will update into the new record from the previous record, as it did before.

Comparisons to the Quote/Order being copied will occur based on the following information. Popups will appear when the previous quote/order information is different than the resource noted below:

- **Customer Resource**

- Terms
- Discount
- If no primary contact, will compare to customer Bill/Ship/Ack addresses (no comparison on contact name, phone, fax, email, web)
- If primary contact, will compare to contact Bill/Ship/Ack addresses (no comparison on contact name, phone, fax, email, web)
- Salespersons
- Tax Codes

- **Program Resource**

- If program has a primary contact, will compare to contact Bill/Ship/Ack addresses (no comparison on contact name, phone, fax, email, web)
- Salesperson (If Program #, comparison will be for that program)

- **Product Resource**

- Product Description
- Product Additional Charge Description
- Vendor SKU
- Price (If Program #, will look for product program pricing information)
- Product Additional Charge Price
- Matrix Upcharge Price

- **Vendor Resource**

- Vendor Ship From Address (no comparison on contact name, phone, fax, email, web)
- Vendor Ship To Address (no comparison on contact name, phone, fax, email, web)