

How to Duplicate a Quote

1. Open the Quote record to be duplicated. If you have not created the order yet, refer to [How to Create Standard Quote](#).
2. Click the **Duplicate** button. If the quote is not yet saved, it will be saved automatically.

Quote - ABC Reseller

New Save Search Delete Undo Print Blend Process **Duplicate** Recurring Close

Details Instructions Attachments (0) Audit Log (2) Comments (0) Approval (0)

Type: Standard Bill To: ABC Reseller PO Nur

The new Quote will be shown automatically. Note that on the new Quote, the Date will default to the system date and the Comments' value will be appended with **DUP: <original Quote No>**.

Quote - ABC Reseller

New Save Search Delete Undo Print Blend Process **Duplicate** Recurring Close

Details Instructions Attachments (0) Audit Log (0) Comments (0) Approval (0)

Type: Standard Bill To: ABC Reseller PO Number: Order No: QU-49

Customer: ABC Reseller Ship To: ABC Reseller BOL No: Split:

Date: 6/30/2016 Ordered By: irelyadmin Status: Pending Salesperson: Jared Smith

Due Date: 7/30/2016 Ship Via: UPS Template Currency: USD

Location: 0001 - Fort Wayne Terms: 5% 5, Net 30 Expiration: Comments: e Standard Quote **DUP: QU-48**

1. Open the Quote record to be duplicated. If you have not created the order yet, refer to [How to Create Standard Quote](#).
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Quote - ABC Reseller

New Save Search Delete Undo Print Process **Duplicate** Customer Close

Details Instructions Attachments (0) Audit Log (1) Comments (0)

Type: Standard Bill To: ABC Reseller Ordered By: irelyadmin Order No: QU-21

Customer: ABC Reseller Ship To: ABC Reseller PO Number: Salesperson: Jared Sn Status: Pending

Date: 04/18/2016 Due: 05/18/2016 Ship Via: UPS BOL No: Split: Currency: USD

Location: 0001 - Fort Wayne Terms: 5% 5, Net 30 Template Comments: Sample Quote.

Item No	Description	UOM	Ordered	Discount	Tax	Price	Total	Tax Group
87G	87 Unleaded Gasoline	Gallon	1.00	0.00%	0.00	1.850000	1.85	
			0.00	0.00%	0.00	0.000000	0.00	

Bill To: ABC Reseller Somewhere St. Indianapolis, IN. 46204 Item: On Hand: On Order (PO): Quote: Subtotal: 1.85

Ship To: ABC Reseller Somewhere St. Indianapolis, IN. 46204 Committed: Back Order: Preliminary Quote: Shipping: 0.00

Tax: 0.00

Total: 1.85

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Quote - ABC Reseller

New Save Search Delete Undo Print Process **Duplicate** Customer Close

Details Instructions Attachments (0) Audit Log (0) Comments (0)

Type: Standard Bill To: ABC Reseller Ordered By: irelyadmin Order No: QU-22

Customer: ABC Reseller Ship To: ABC Reseller PO Number: Salesperson: Jared Sn Status: Pending

Date: 04/18/2016 Due: 05/18/2016 Ship Via: UPS BOL No: Split: Currency: USD

Location: 0001 - Fort Wayne Terms: 5% 5, Net 30 Template Comments: Sample Quote. DUP: QU-21

Item No	Description	UOM	Ordered	Discount	Tax	Price	Total	Tax Group
87G	87 Unleaded Gasoline	Gallon	1.00	0.00%	0.00	1.850000	1.85	
			0.00	0.00%	0.00	0.000000	0.00	

Bill To: ABC Reseller Somewhere St. Indianapolis, IN. 46204 Item: On Hand: On Order (PO): Quote: Subtotal: 1.85

Ship To: ABC Reseller Somewhere St. Indianapolis, IN. 46204 Committed: Back Order: Preliminary Quote: Shipping: 0.00

Tax: 0.00

Total: 1.85

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1. Open the Quote record to be duplicated. If you have not created the order yet, refer to [How to Create Standard Quote](#).
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Quote - ABC Reseller

New Save Search Delete Undo Process Duplicate Customer Close

Details Attachments (0) Audit Log (1) Comments (0)

Customer: ABC Reseller Ship To: ABC Reseller Ordered By: irelyadmin Quote No: QU-2

Date: 01/20/2016 Due: 01/25/2016 Bill To: ABC Reseller PO Number: Status: Pending

Location: 0001 - Fort Wayne Ship Via: Truck BOL No: Currency: USD Split:

Salesperson: Mike Moriarty Terms: 5% 5 Net 30 Template: Comments: Sample Quote.

+ Insert Open X Remove Add Recipe Get Previous Details Layout Filter Records (F3)

Item No	Description	UOM	Ordered	Discou...	Tax	Price	Total	Tax Gro...	Commen
87G	87 Unleaded Gasoline	Gallon	100.00	0.00%	14.80	1.850000	185.00	IN SST	
	sample misc item		1.00	0.00%	0.00	10.500000	10.50		
			0.00	0.00%	0.00	0.000000	0.00		

Bill To: ABC Reseller Somewhere St. Indianapolis, IN 46204 United Item: On Hand: On Order (PO): Preliminary Quote: Subtotal: 195.50

Ship To: ABC Reseller Somewhere St. Indianapolis, IN 46204 United Committed: Back Order: Shipping: 0.00

Tax: 14.80

Total: 210.30

Saved Page 1 of 1

The new Quote will be shown automatically. Note that on the new Quote, the Date will default to the system date and the Comments' value will be appended with **DUP: <original Quote No>**.

Quote - ABC Reseller

New Save Search Delete Undo Process Duplicate Customer Close

Details Attachments (0) Audit Log (0) Comments (0)

Customer: ABC Reseller Ship To: ABC Reseller Ordered By: irelyadmin Quote No: QU-3

Date: 01/20/2016 Due: 01/25/2016 Bill To: ABC Reseller PO Number: Status: Pending

Location: 0001 - Fort Wayne Ship Via: Truck BOL No: Currency: USD Split:

Salesperson: Mike Moriarty Terms: 5% 5 Net 30 Template: Comments: Sample Quote. DUP: QU-2

+ Insert Open X Remove Add Recipe Get Previous Details Layout Filter Records (F3)

Item No	Description	UOM	Ordered	Discou...	Tax	Price	Total	Tax Gro...	Commen
87G	87 Unleaded Gasoline	Gallon	100.00	0.00%	14.80	1.850000	185.00	IN SST	
	sample misc item		1.00	0.00%	0.00	10.500000	10.50		
			0.00	0.00%	0.00	0.000000	0.00		

Bill To: ABC Reseller Somewhere St. Indianapolis, IN 46204 United Item: On Hand: On Order (PO): Preliminary Quote: Subtotal: 195.50

Ship To: ABC Reseller Somewhere St. Indianapolis, IN 46204 United Committed: Back Order: Shipping: 0.00

Tax: 14.80

Total: 210.30

Ready Page 1 of 2

1. Open the Quote record to be duplicated. If you have not created the order yet, refer to [How to Create Standard Quote](#).
2. Click the **Duplicate** toolbar button. If the quote is not yet saved, it will be saved automatically.

Quote - ABC Reseller

New Save Search Delete Undo Process Duplicate Customer Close

Details Attachments Audit Log

Customer: 0001005066 Ship To: ABC Reseller Ordered By: irelyadmin Quote No: QU-3

Date: 01/20/2016 Due: 01/20/2016 Bill To: ABC Reseller PO Number: PO#04 Status: Pending

Location: 0001 - Fort Wayne Ship Via: Truck BOL No: Currency: USD Split:

Salesperson: 0001005049 Terms: Due on Receipt Template: Comments: Sample Quote.

+ Insert View Remove Get Previous Details Layout Filter Records (F3)

Item No	Description	UOM	Mainten...	Frequen...	Start Date	Ordered	Discoun...	Mainten...	Licens
87G	87 Unleaded Gasoline	Gallon				10.00	0.00	0.000000	0.00
	sample misc item					5.00	0.00	0.000000	0.00
						0.00	0.00	0.000000	0.00

Bill To: ABC Reseller Somewhere St. Fortville, IN 46040 United Item: On Hand: On Order (PO): Preliminary Quote: Subtotal: 34.30

Ship To: ABC Reseller Somewhere St. Fortville, IN 46040 United Committed: Back Order: Shipping: 0.00

Tax: 1.30

Total: 35.60

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The new Quote will be shown automatically. Note that on the new Quote, the Date will default to the system date and the Comments' value will be appended with **DUP: <original Quote No>**.

The screenshot shows the 'Quote - ABC Reseller' window. The 'Details' tab is active. The 'Customer' field is '0001005066'. The 'Ship To' is 'ABC Reseller'. The 'Ordered By' is 'irelyadmin'. The 'Quote No.' is 'QU-4'. The 'Date' is '01/20/2016'. The 'Due' date is '01/20/2016'. The 'Bill To' is 'ABC Reseller'. The 'PO Number' is 'PO#04'. The 'Status' is 'Pending'. The 'Location' is '0001 - Fort Wayne'. The 'Ship Via' is 'Truck'. The 'BOL No.' is empty. The 'Currency' is 'USD'. The 'Split' is empty. The 'Salesperson' is '0001005049'. The 'Terms' are 'Due on Receipt'. The 'Template' is empty. The 'Comments' are 'Sample Quote. DUP: QU-3'. Below the details, there is a table with columns: Item No, Description, UOM, Mainten..., Frequen..., Start Date, Ordered, Discoun..., Mainten..., and Licens. The table contains three rows: 87G, 87 Unleaded Gasoline, Gallon, 10.00, 0.00, 0.000000, 0.00; sample misc item, 5.00, 0.00, 0.000000, 0.00; and a total row with 0.00, 0.00, 0.000000, 0.00. At the bottom right, there is a summary section with fields: Bill To, Ship To, Item, On Hand, On Order (PO), Committed, Back Order, Preliminary Quote, Subtotal, Shipping, Tax, and Total. The Subtotal is 34.30, Shipping is 0.00, Tax is 1.30, and Total is 35.60.

1. Open the Quote record to be duplicated. If you have not created the order yet, refer to [How to Create Standard Quote](#).
2. Click the **Duplicate** toolbar button. If the quote is not yet saved, it will be saved automatically.

The screenshot shows the 'Quote - Home Dealers' window. The 'Details' tab is active. The 'Customer' is 'HOMEDEALER'. The 'Location' is '1000-Location A'. The 'Date' is '06/30/2015'. The 'Currency' is 'USD'. The 'Quote Status' is 'Pending'. The 'Quote No.' is 'QU-1'. The 'Bill To' is 'US' with address '18 Central St. Edison, OH, 43320'. The 'Ship To' is 'US' with address '18 Central St. Edison, OH, 43320'. The 'Template' is empty. The 'PO Number' is empty. The 'Salesperson' is 'JAS'. The 'Ordered By' is 'AGADMIN'. The 'Ship Via' is 'UPS Ground'. The 'BOL No.' is empty. The 'Terms' are 'Due 28th of the Mo'. The 'Split' is empty. The 'Due Date' is '07/28/2015'. The 'Comments' are 'This is sample Quote.'. Below the details, there is a table with columns: Item No, Description, UOM, Ordered, Discoun..., Tax, Price, and Total. The table contains three rows: Bag, Inventory Type, Dozen, 2.00, 0.00, 0.00, 22.00, 44.00; sample miscellaneous item, 1.00, 0.00, 0.00, 55.00, 55.00; and a total row with 0.00, 0.00, 0.00, 0.00, 0.00. At the bottom right, there is a summary section with fields: Subtotal, Shipping, Tax, and Total. The Subtotal is 99.000000, Shipping is 0.000000, Tax is 0.000000, and Total is 99.000000.

The new Quote will be shown automatically. Note that on the new Quote, the Date will default to the system date and the Comments' value will be appended with **DUP: <original Quote No>**.

Quote - Home Dealers

New Save Search Delete Undo Process Duplicate Customer Close

Details Attachments

Customer: HOMEDEALER Location: 1000-Location A Date: 06/30/2015 Currency: USD Quote Status: Pending Quote No: QU-2

Bill To: US Ship To: US Template: PO Number: 18 Central St. Edison, OH, 43320 18 Central St. Edison, OH, 43320 Salesperson: JAS Ordered By: AGADMIN Ship Via: UPS Ground BOL No: Terms: Due 28th of the Mo Split: Due Date: 06/28/2015 Preliminary Quote?: ☐

Comments: This is sample Quote. DUP: QU-1

Insert View Remove Layout Filter Records (F3)

Item No	Description	UOM	Ordered	Discoun...	Tax	Price	Total
Bag	Inventory Type	Dozen	2.00	0.00	0.00	22.00	44.00
	sample miscellaneous item		1.00	0.00	0.00	55.00	55.00
			0.00	0.00	0.00	0.00	0.00

Subtotal: 99.000000
Shipping: 0.000000
Tax: 0.000000
Total: 99.000000

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