SO Clone Program

This program will create an exact copy of an existing Sales Order, using the same items and total quantities as the original. Sales Orders to be cloned may be selected from the current or history files, and the standard <F2> lookup functions are available.

Once an order has been selected, the program will allow you to choose the customer to whom the new Sales Order is to be assigned, and edit the PO number for the new order. The new order will receive the next available Sales Order number, will be dated as of the current date, and will be marked current. Any previously shipped amounts are added back to the open amount, and the tax rate and tax district are copied from the new customer's record. Finally, the print flag is removed, and the new order is set to new sales order status. Note that Salesperson, Territory, Discount% and GL link codes are copied from the original SO, not from the customer record. If the order being cloned is not a Bid, the allocated amount is updated in the inventory file, and the customer's on order field is increased to reflect the new order.

Once the new order has been created, it may be edited using the standard functions available in Sales Orders, and shipped in the normal manner.

These features can be used in several ways:

-Set up one or more "Bid" type orders as templates to be copied. Identify the type of order template in the PO Number field (e.g., "Standard Order", "Week 1 Delivery", etc.) This is useful if you sell standard sets of items, or have many similar orders to fill. You may want to assign the template order(s) to a "generic" customer, and then put that customer on credit hold in order to prevent accidentally shipping the template. Orders that are used as templates should normally be set up as Bids in order to avoid allocating inventory items. They can be converted to real orders with a couple of keystrokes during the editing process.

-If your inventory is small, and your customers usually order most of the items on the list, set up an order that contains all of the items, clone it, and just adjust quantities and delete the ones you don't want.

-Set up a "standard order" for each customer, using a separate number range for the standard orders, then clone them and edit as needed.

-Use it as a rudimentary "kitting" function by setting up standard orders for kit items. This would make sense if there is only one kit item per order and the # of kits sold is always the same.