Copying a Template From One Sales Organization to Another

1. Log in to **Administration.**

2. Open the **Sales folder** that houses the template you wish to copy and select the **Template** icon.



3. Right-click the template you wish to copy and select **Copy/Import**.



4. The **Copy/Import** window will appear.



* Under the **Copy Type** select the radio button next to **Template**.



* The**Copy Details**area allows you to choose what level of information you want to copy from the original **Template**. Choose the **Physical Only** radio button if you only want to copy the general information of the template. Choose the **Tier/Inventory** radio button if you want to copy the template information with the same tier inventory. Choose the **Price** radio button if you want to copy everything and include the prices that were built in the original **Template**.



* In **Copy to Organization,** select the **Sales Organization** folder this template will be copied to.



5. Enter your **Template Name**, and select the **Template Venue**.



6. Click **Apply** to save your changes and **OK**to close the window.

