



Coffee Break & Learn: Tip of the Week – April 27, 2017

Copy And Paste Table Contents

Available in SAP Business One 9.1

Copying and Pasting in Marketing Documents

Did you know that you can copy and paste tables to and from SAP? There are three variations of copy and paste functions available starting in release 9.1:

- SAP to SAP
- SAP to Excel
- Excel to SAP

SAP to SAP

If you want to copy one customer's orders to another customer's, you can use the Duplicate function. If you want to copy a customer's sales orders to A/R invoice, you can use the Copy To function. But what if you want to copy one customer's sales quotation to another customer's sales order? In that case, you can use the Copy Table function. The steps are as follows:

1. Open the marketing document you would like to copy
2. Right click anywhere on the table and click Copy Table

The screenshot shows the SAP Sales Quotation interface. At the top, there are fields for Customer (C30000), Name (Microchips), Contact Person (Judy Brown), PO No., Local Currency, and Branch (OEC Computers). Below these fields are three tabs: Contents, Logistics, and Accounting. The Contents tab is active, displaying a table with the following data:

#	Item No.	Item Description
1	A00002	J.B. Officeprint 1111
2	C00001	Motherboard BTX
3	I00003	USB Flashdrive 128GB
4	LM4029	LeMon 4029 Printer
5	P10001	PC - 8x core, DDR 32GB, 2TB HDD
6	R00001	Printer Paper A4 White
7		

A context menu is open over the table, with the 'Copy Table' option highlighted in blue. Other options in the menu include Cut, Copy, Paste, Delete, Maximize/Restore Grid, Cancel, Close, and Duplicate.

3. Open the destination document, right click, and click Paste

The screenshot shows the SAP Sales Order form. The header fields include Customer (C40000), Name (Earthshaker Corporation), Contact Person (Bob McKensly), Customer Ref. No., BP Currency (\$), and Branch (OEC Computers). Below the header, there are tabs for Contents, Logistics, and Accounting. The 'Contents' tab is active, showing a table with columns for Item No., Item Description, Quantity, and Unit Price. A context menu is open over the table, with the 'Paste' option highlighted in blue. Other menu options include Copy Table, Maximize/Restore Grid, Add Row, Duplicate Row, List of Items, and Row Details...

4. When asked if the selected contents include header information, click Yes

The screenshot shows a 'System Message' dialog box with the question 'Do the selected contents include header information?'. There are three buttons at the bottom: 'Yes', 'No', and 'Cancel'. The 'Yes' button is highlighted with a blue border.

Notes/Caveats:

- Header information is automatically copied from SAP tables
- Selecting no when asked if header information will result in headers being read as data inputs
- Default quantity (if quantity column is not displayed in source document) is 1

SAP To Excel

1. Open the marketing document you would like to copy
2. Right click anywhere on the table and click Copy Table
3. Open a spreadsheet and paste

	A	B	C	D	E	F	G
1	Item No.	Item Description	Quantity	Unit Price	Discount %	Tax Code	Total (LC)
2	A00002	J.B. Officeprint 1111	1	\$250.00	0	NY	\$250.00
3	C00001	Motherboard BTX	2	\$500.00	0	NY	\$1,000.00
4	I00003	USB Flashdrive 128GB	3	\$25.00	0	NY	\$75.00
5	LM4029	LeMon 4029 Printer	4	\$300.00	0	NY	\$1,200.00
6	P10001	PC - 8x core, DDR 32GB, 2TB HDD	5	\$1,800.00	0	NY	\$9,000.00
7	R00001	Printer Paper A4 White	6	\$37.50	0	NY	\$225.00

Notes/Caveats:

- Only what is displayed in the table will be copied, so ensure all desired fields are selected in Form Settings

Excel to SAP

1. Copy the table from Excel with or without the header

	A	B	C	D	E	F	G	H	I
1	Item No.	Item Description	Quantity	Unit Price	Discount %	Tax Code	Total (LC)	In Stock	Gross Profit Base Price
2	A00002	J.B. Officeprint 1111	1	\$250.00				10	\$146.68
3	C00001	Motherboard BTX	2	\$500.00				72	\$290.19
4	I00003	USB Flashdrive 128GB	3	\$25.00				942	\$14.61
5	LM4029	LeMon 4029 Printer	4	\$300.00				253	\$193.21
6	P10001	PC - 8x core, DDR 32GB, 2TB HDD	5	\$1,800.00				12	\$1,064.05
7	R00001	Printer Paper A4 White	6	\$37.50				72	\$22.50

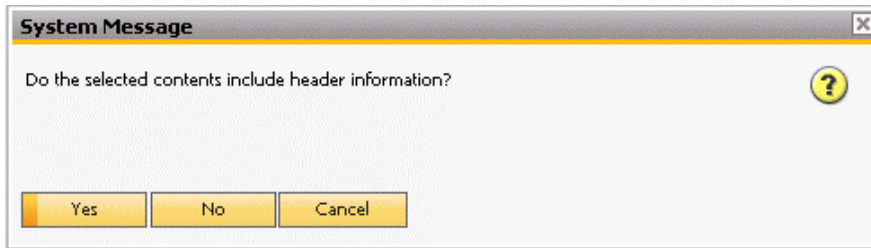
2. Open destination marketing document, and right click anywhere in rows, and click Paste

Sales Order

Customer: C23900
 Name: Parameter Technology
 Contact Person: Daniel Brown
 Customer Ref. No.:
 BP Currency: \$
 Branch: OEC Computers

#	Item No.	Item Description	Quantity	Unit Price	Discount %	Ta
1		Copy Table			0.000	

3. Select whether or not the copied cells include header information



The marketing document will populate accordingly

A screenshot of a 'Sales Order' form. The form includes several input fields: 'Customer' (C23900), 'Name' (Parameter Technology), 'Contact Person' (Daniel Brown), 'Customer Ref. No.', 'BP Currency' (\$), and 'Branch' (OEC Computers). Below these fields are tabs for 'Contents', 'Logistics', and 'Accounting'. Under the 'Contents' tab, there is a table with columns: '#', 'Item No.', 'Item Description', 'Quantity', and 'Unit Price'. The table contains 6 rows of data.

#	Item No.	Item Description	Quantity	Unit Price
1	A00002	J.B. Officeprint 1111	1	\$ 250.00
2	C00001	Motherboard BTX	2	\$ 500.00
3	I00003	USB Flashdrive 128GB	3	\$ 25.00
4	LM4029	LeMon 4029 Printer	4	\$ 300.00
5	P10001	PC - 8x core, DDR 32GB, 2TB HDD	5	\$ 1,800.00
6	R00001	Printer Paper A4 White	6	\$ 37.50
7				

Notes/Caveats:

- When header information is included, SAP will be able to link the columns according to the headers
- When header information is not included, source and destination columns must correspond exactly to prevent data errors

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