



# Copy Tool

For Dynamics CRM 2013



# Copy Tool

- **Copy Tool simplifies creation of sales documents in the Dynamics CRM.**
- **You can create a new document by copying information from the selected document.**
- **When using a copy function you can specify what information should be copied to the new record.**



# **COPY OPPORTUNITY**





# Select source Opportunity from a list view and Use "Copy Opportunity" button

SALES Opportunities

Adam McAma First

NEW EDIT DELETE CLOSE AS WON CLOSE AS LOST

### My Open Opportunities

Topic	Est. Close Date	Est. Value
Will be ordering about 110 items of all types (sample)	04/04/2014	
Very likely will order 18 Product SKU JJ202 this year (sam...	03/02/2014	
They sell many of the same items that we do - need to fol...	06/03/2014	
Needs to restock their supply of Product SKU AX305; will...	31/12/2013	
Needs to restock their supply of all Products	01/02/2012	
Needs to restock their supply of all Products	01/02/2012	
Needs to restock their supply of all Products	01/02/2012	
6 orders of Product SKU JJ202 (sample)	03/11/2013	

- Reopen Opportunity
- Send Direct Email
- Assign
- Share
- Copy a Link
- Follow
- Unfollow
- Run Workflow
- Start Dialog
- Copy Opportunity**
- Run Report
- Export to Excel
- Import Data
- Email a Link
- Advanced Find
- Chart Pane

Account	Probability	Rating
ho Winery (sa...	80	Hot
vine Ski Hous...		Hot
ntoso Pharma...	95	Hot
e Yonder Airli...		Hot
net Ltd	85	Cold
de World	10	Cold
net Ltd	90	Cold
orikam, Inc. (s...	90	Hot

1 - 8 of 8 (1 selected)

ALL # A B C D E F G H I J K L T U V W X Y Z



Copy Tool can also be used from a record level.

SALES Opportunities 6 orders of Product...

Adam McAma First

NEW CLOSE AS WON CLOSE AS LOST RECALCULATE OPPORTUN... ASSIGN

OPPORTUNITY

# 6 orders of Product SKU JJ202 (sample)

Est. Close Date	Est. Revenue	Status	Owner*
03/11/2013	£10,000.00	In Progress	Adam McAma

Qualify Develop Propose (Active)

Identify Sales Team	mark complete	Present Proposal	completed
Develop Proposal	mark complete		
Complete Internal Review	completed		

Next Stage

- Email a Link
- Delete
- Switch Process
- Edit Process
- Form
- Share
- Follow
- Run Workflow
- Start Dialog
- Copy Opportunity**

## Summary

Topic*	6 orders of Product SKU JJ202 (sam)
Contact	<a href="#">Maria Campbell (sample)</a>
Account	<a href="#">Fabrikam, Inc. (sample)</a>
Purchase Timeframe	This Year
Currency*	Pound Sterling

Open

POSTS ACTIVITIES NOTES

Enter post here POST

Both Auto posts User posts

6 orders of Product SKU JJ202 (sample)  
Opportunity Created by Adam McAma for Account Fabrikam, Inc. (sample)



Select Customer and specify information you want to copy to a new transaction.

**Copy Opportunity**  
Specify information you would like to be copied from the original opportunity.

Topic\*

Potential Customer\*

Est. Revenue  Notes

Existing Products  Write-In Products

Competitors

Open newly created record

6.0.13276.1

Keep this selected to open newly created record

Use Copy button to continue



**COPY QUOTE**



Select source Quote from a list view and Use” Copy Quote” button.

The screenshot shows a CRM interface with a top navigation bar containing 'SALES' and 'Quotes'. Below this is a toolbar with buttons for '+ NEW', 'EDIT', 'DELETE', 'SEND DIRECT EMAIL', and 'ASSIGN'. A search bar is visible on the right. The main area displays a list view titled 'My Quotes' with columns for 'Name', 'Status', and 'Total'. The first row, 'New Year Offer (25% discount)' with a status of 'Draft', is selected. A context menu is open over this row, listing various actions. The 'Copy Quote' option is highlighted with a red rectangle. At the bottom, there is a pagination bar showing '1 - 4 of 4 (1 selected)' and an alphabetical index.

Name	Status	Total
New Year Offer (25% discount)	Draft	
New Year Offer (25% discount)	Draft	
New Year Offer (25% discount)	Draft	
New Year Offer (25% discount)	Draft	

- Share
- Copy a Link
- Unfollow
- Run Workflow
- Start Dialog
- Copy Quote**
- Run Report
- Export to Excel
- Import Data
- Email a Link
- Advanced Find
- Chart Pane
- View
- New System View
- Customize Entity
- System Views





# Copy Tool can also be used from a record level.

SALES | Quotes | New Year Offer (25... | Adam McAm First

+ NEW DELETE LOOK UP ADDRESS ACTIVATE QUOTE PRINT QUOTE FOR CUSTO...

QUOTE  
New Year Offer (25% discount)

Total Amount £15,000.00

Owner\* Adam McAm

Quote ID\* OFERTA001  
Revision ID\* 0  
Name\* New Year Offer (25% discount)  
Currency\* Pound Sterling  
Price List\* Standard Customers Pricelist

SHIPPING INFORMATION  
Shipping Method --  
Payment Terms 2% 10, Net 30  
Freight Terms No Charge

PRODUCTS

Product Name	Price	Quantity	Discount	Extended
Software - Tools - TL001	£500.00	5.00000	£0.00	£2,500.00
Software - Tools - TL002	£500.00	5.00000	£0.00	£2,500.00
Software - Tools - TL003	£500.00	5.00000	£0.00	£2,500.00
Software - Tools - TL004	£500.00	5.00000	£0.00	£2,500.00
Software - Tools - TL005	£500.00	10.00000	£0.00	£5,000.00

Copy Quote

Draft



Select Customer and specify information you want to copy to a new transaction.

**Copy Quote**  
Specify information you would like to be copied from the original quote.

Name\*

Customer\*  Price List\*

<input type="checkbox"/> Addresses	<input type="checkbox"/> Shipping
<input checked="" type="checkbox"/> Totals	<input type="checkbox"/> Notes
<input checked="" type="checkbox"/> Existing Products	<input type="checkbox"/> Write-In Products
<input type="checkbox"/> Other Contacts	

Open newly created record

6.0.13276.1

Keep this selected to open newly created record

Use Copy button to continue



# **COPY ORDER**





Select source Sales Order from a list view and Use” Copy Sales Order” button.

The screenshot shows a CRM interface with a dark blue header. The user is logged in as Adam McAma First. The main area displays a list view titled 'My Orders'. A table with columns 'Name', 'Status Reason', and 'Total' contains one record: 'New Order - Specialty Sports Store (Software)' with status 'New'. A context menu is open over this record, listing various actions. The 'Copy Sales Order' option is highlighted with a red box. Other options include Share, Copy a Link, Unfollow, Run Workflow, Start Dialog, Run Report, Export to Excel, Import Data, Email a Link, Advanced Find, Chart Pane, View, New System View, Customize Entity, and System Views. The bottom of the screen shows a status bar with '1 - 1 of 1 (1 selected)' and a navigation bar with letters A through Z.



# Copy Tool can also be used from a record level.

SALES | Orders | New Order - Special...

Adam McAma First

+ NEW DELETE CREATE INVOICE FULFILL ORDER CANCEL ORDER

ORDER

## New Order - Specialty Sports Sto

Total Amount	Status*	Status Reason	Owner*
£1,299.13	Active	New	Adam McAma

### Summary

Order ID*	ORDER - 010
Name*	New Order - Specialty Sp
Currency*	Pound Sterling
Price List*	Standard Customers Pric
Prices Locked*	No

### PRODUCTS

Product Name	P	Disco
No Order Product records found.		

### SALES INFORMATION

Opportunity	Needs to restock
Quote	--
Potential Customer*	Specialty Spr

### SHIPPING DATES

Requested Delivery	30/03/2012
Date Fulfilled	--

### DETAILS

Detail Amount	£0.00
(-) Discount (%)	{ -- }
(-) Discount	£338.90

Active

- Recalculate
- Lock Pricing
- Look Up Address
- Assign
- Share
- Email a Link
- Run Workflow
- Start Dialog
- Copy Sales Order**
- Form

### DESCRIPTION

New Software Order



Select Customer and specify information you want to copy to a new transaction.

**Copy Order**  
Specify information you would like to be copied from the original order.

Name\*

Customer\*  Price List\*

Addresses  Shipping

Totals  Notes

Existing Products  Write-In Products

Other Contacts

Open newly created record

6.0.13276.1

Keep this selected to open newly created record

Use Copy button to continue



# **COPY INVOICE**





Select source Invoice from a list view and Use” Copy Invoice” button.

The screenshot shows a CRM interface with a top navigation bar containing 'SALES' and 'Invoices'. Below the navigation bar, there are action buttons: '+ NEW', 'EDIT', 'DELETE', 'SEND DIRECT EMAIL', and 'ASSIGN'. The main area displays a list view titled 'My Invoices' with columns for 'Name' and 'Customer'. The 'Invoice for Software - Bike Universe' row is selected. A context menu is open over this row, listing various actions. The 'Copy Invoice' option is highlighted with a red box. At the bottom, there is a status bar showing '1 - 10 of 10 (1 selected)' and a keyboard navigation bar with letters A through Z.

Name	Customer
Invoice for Software - 2B.net Ltd	2B.net Ltd
Invoice for Software - Aaromba Pty Ltd	Aaromba Pty Ltd
Invoice for Software - AccuFirst Inc	AccuFirst Inc
✓ Invoice for Software - Bike Universe	<u>Bike Universe</u>
Invoice for Software - Bold Bike Access	Bold Bike Access
Invoice for Software - Litware Inc	Litware Inc
Invoice for Software - Major Sport Supp	Major Sport Supp
Invoice for Software - New and Used Bikes	New and Used Bikes
Invoice for Software - Northwind Traders	Northwind Traders
Invoice for Software - Specialty Sports	Specialty Sports

- Share
- Copy a Link
- Unfollow
- Run Workflow
- Start Dialog
- Copy Invoice**
- Run Report
- Export to Excel
- Import Data
- Email a Link
- Advanced Find
- Chart Pane
- View
- New System View
- Customize Entity
- System Views





# Copy Tool can also be used from a record level.

SALES Invoices Invoice for Software...

Adam McAma First

NEW DELETE LOOK UP ADDRESS INVOICE PAID CANCEL INVOICE

## INVOICE

### Invoice for Software - Bike Univers

Total Amount: £11,682.63 | Status: Active | Status Reason: New | Owner: Adam McAma

#### Summary

Invoice ID\*: FAKTURA-004  
Name\*: Invoice for Software - E  
Currency\*: Pound Sterling  
Price List\*: Standard Customers Pr  
Prices Locked\*: No

#### PRODUCTS

Product Name	Price Per Unit	Quantity
Software - Tools - TL001	£500.00	5.00000
Software - Tools - TL002	£500.00	10.00000
Software - Tools - TL003	£500.00	5.00000
Software - Tools - TL004	£500.00	2.00000
Software - Tools - TL005	£500.00	1.00000

#### SALES INFORMATION

Opportunity: Needs to restoc  
Order: New Order - M  
Customer\*: Bike Univer

Description: Invoice for Software - Bike Universe

Active

- Recalculate
- Lock Pricing
- Assign
- Share
- Email a Link
- Run Workflow
- Start Dialog
- Copy Invoice**
- Form



Select Customer and specify information you want to copy to a new transaction.

**Copy Invoice**  
Specify information you would like to be copied from the original invoice.

Name\* Invoice for Software - Bike Universe

Customer\* Litware, Inc. (sample) Price List\* Standard Customers Pricelis

Addresses  Shipping

Totals  Notes

Existing Products  Write-In Products

Other Contacts

Open newly created record

6.0.13276.1

Copy Cancel

Keep this selected to open newly created record

Use Copy button to continue



# **COPY PRODUCT**





Select source Product from a list view and Use” Copy Product” button.

The screenshot shows a CRM interface with a list of products. The top navigation bar includes 'SALES' and 'Products'. The main area displays a table of products under the heading 'Active Products'. A context menu is open over the first row, 'DPS Activities Mass Update (CRM 2011)', with the 'Copy Product' option highlighted in red. The table has columns for 'Product Name' and 'ID'. The bottom of the screen shows a grid of letters from A to Z and a page indicator 'Page 1'.

Product Name	ID
DPS Activities Mass Update (CRM 2011)	AMUP05
DPS Activities Mass Update (CRM 2013)	AMUP06
DPS Activities Mass Update (CRM 3)	AMUP03
DPS Activities Mass Update (CRM 4)	AMUP04
DPS Activities Summary (CRM 2011)	ACSUM05
DPS Activities Summary (CRM 2013)	ACSUM06
DPS Activities Summary (CRM 4)	ACSUM04
DPS Copy Tool (CRM 2011)	COPY05
DPS Copy Tool (CRM 2013)	COPY06
DPS Copy Tool (CRM 4)	COPY04
DPS Import Tool (CRM 2011)	IMP05
DPS Import Tool (CRM 2013)	IMP06
DPS Import Tool (CRM 3)	IMP03



Copy Tool can also be used from a record level.

SALES Products DPS Import Tool (CRM 2011)

NEW DEACTIVATE DELETE CONVERT TO KIT EMAIL A LINK

PRODUCT  
DPS Import Tool (CRM 2011)

Run Workflow  
Start Dialog  
Copy Product  
Form

PRODUCT DETAILS

ID*	IMP05	Default Price List <sup>+</sup>	2013 Customers
Product Name*	DPS Import Tool (CRM 2011)	List Price	£1,000.00
Subject	Products	Currency	Pound Sterling
Quantity On Hand	--	Decimals Supported*	<input type="text"/>
Unit Group*	ORG	Standard Cost	--
Default Unit*	ORG	Current Cost	£50.00

PRICE LIST ITEMS

Price List ↑	Unit	Pricing Method...	Amount	Percentage
2014 Customers	ORG	Currency Am...	£1,000.00	

Active

You must provide a value for Decimals Supported.



Specify information you want to copy to a new product.

**Copy Product**  
Specify information you would like to be copied from the original product.

ID\*

Name\* DPS Import Tool (CRM 2011)

Unit Group\*   Default Unit\*

Currency   Product Type\*

Kit Products  Substitutes  
 Price List Items  Cost Information  
 Sales Literature  Competitors  
 Description

Open newly created record

5.0.13276.1

Keep this selected to open newly created record

Use Copy button to continue



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**Thank You!**

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