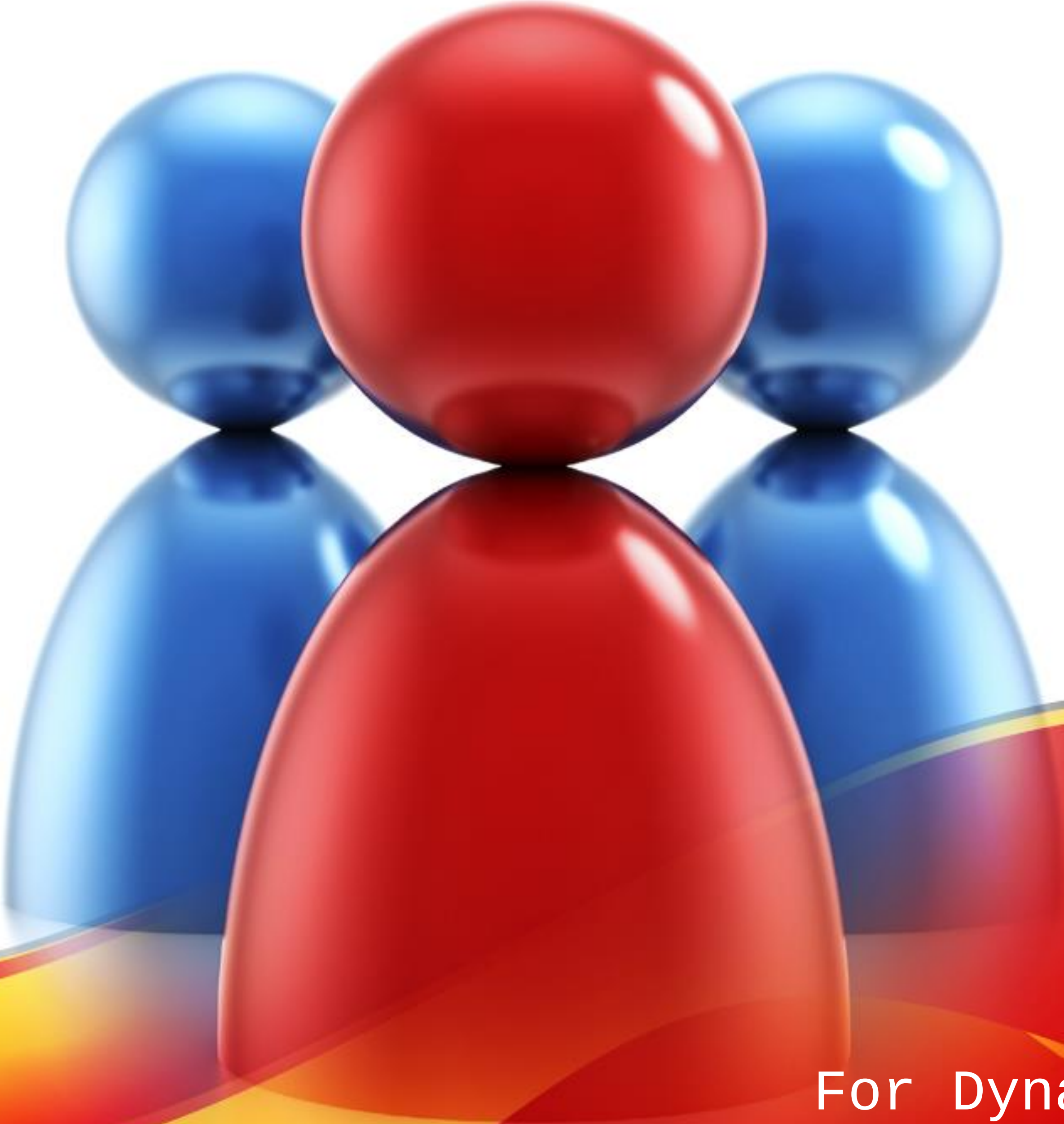


Copy Tool

For Dynamics CRM 2013

Copy Tool

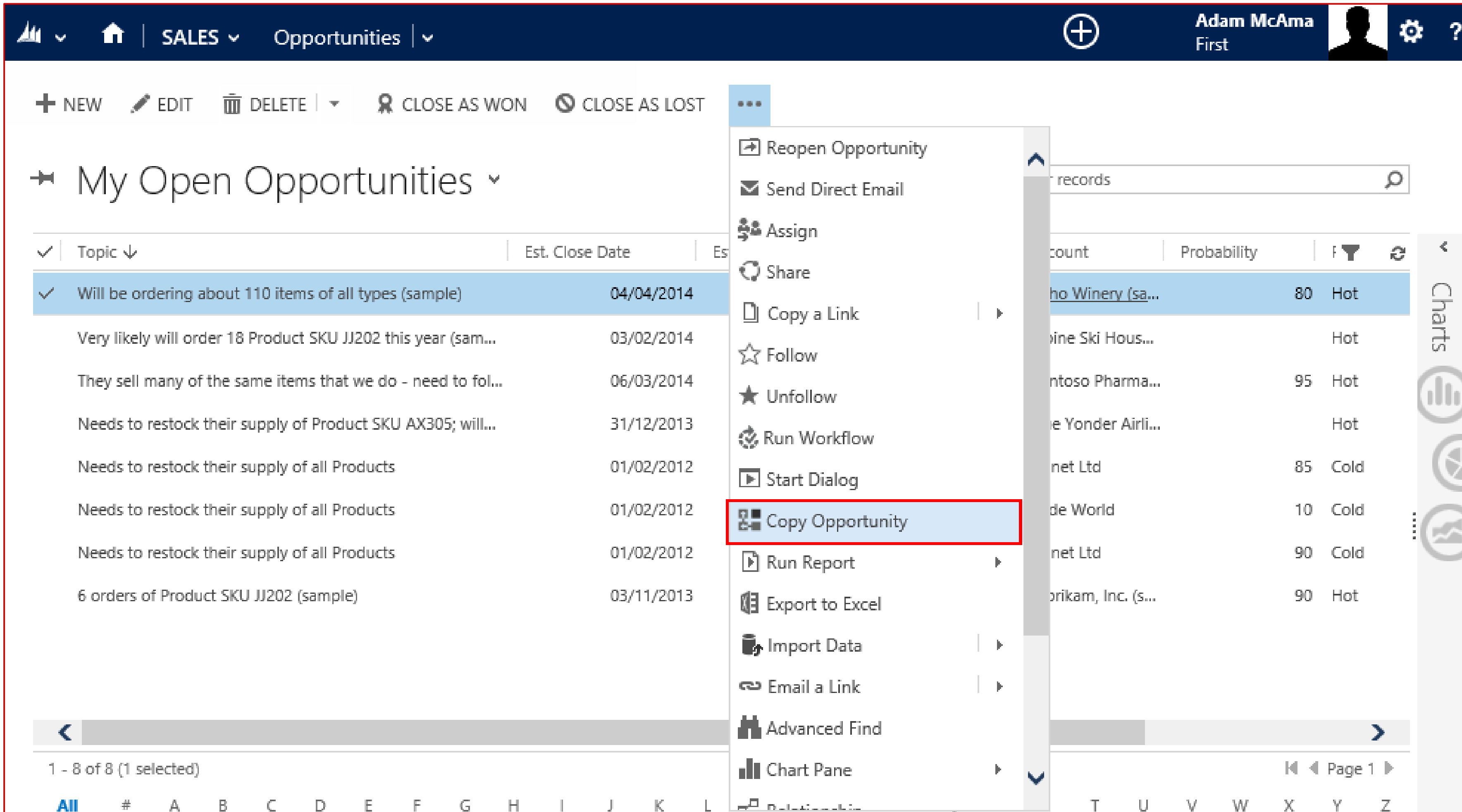
- Copy Tool simplifies creation of sales documents in the Dynamics CRM.

- You can create a new document by copying information from the selected document.

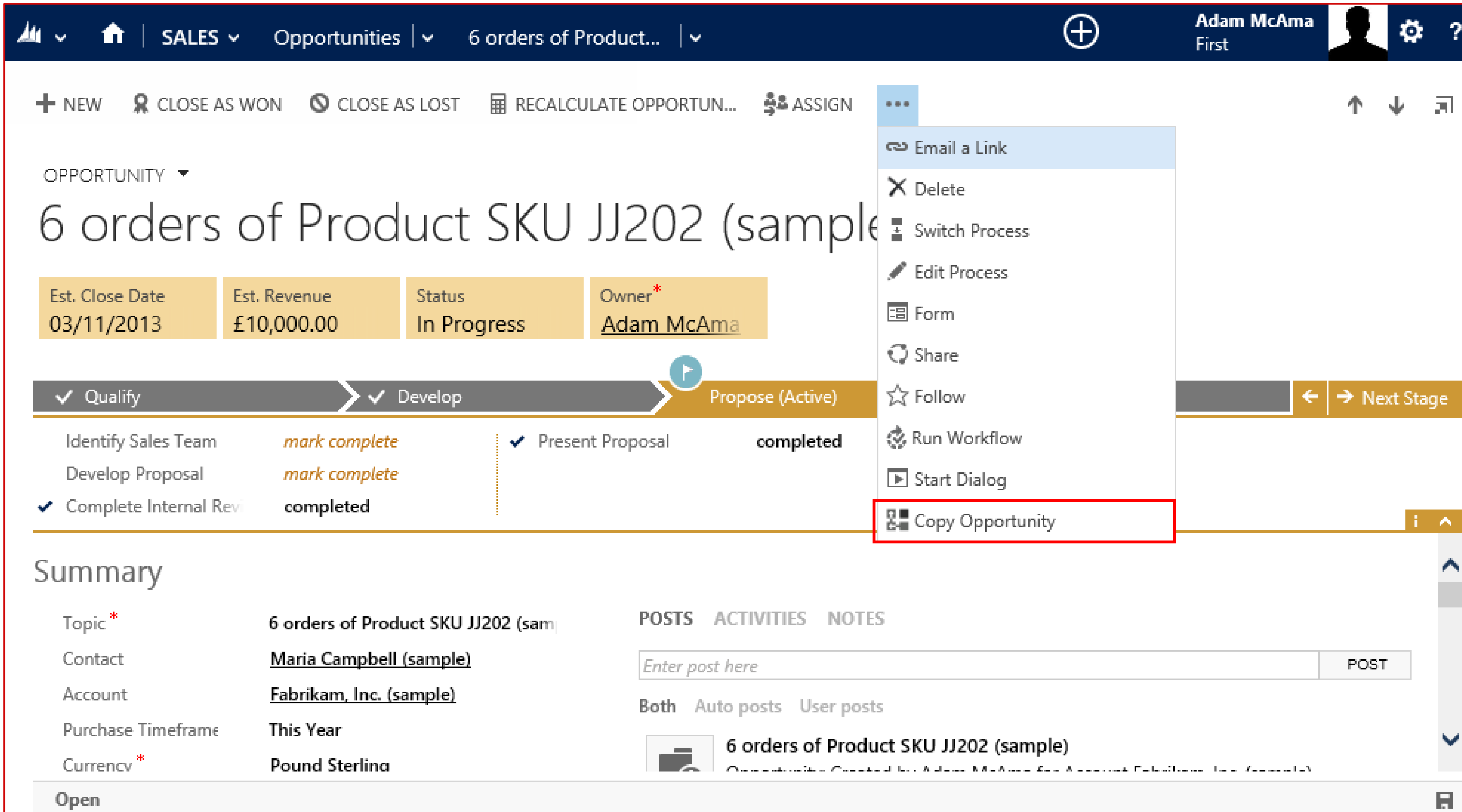
- When using a copy function you can specify what information should be copied to the new record.

COPY OPPORTUNITY

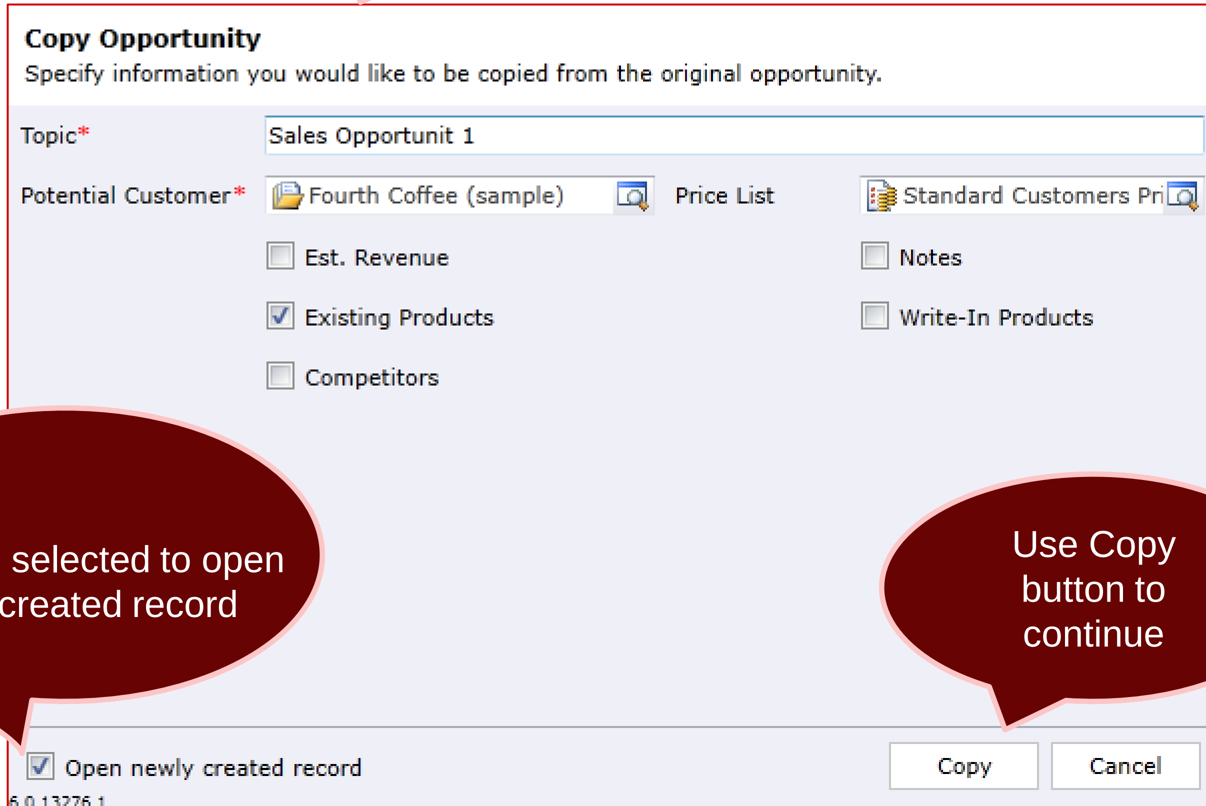
Select source Opportunity from a list view and Use" Copy Opportunity" button



Copy Tool can also be used from a record level.



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

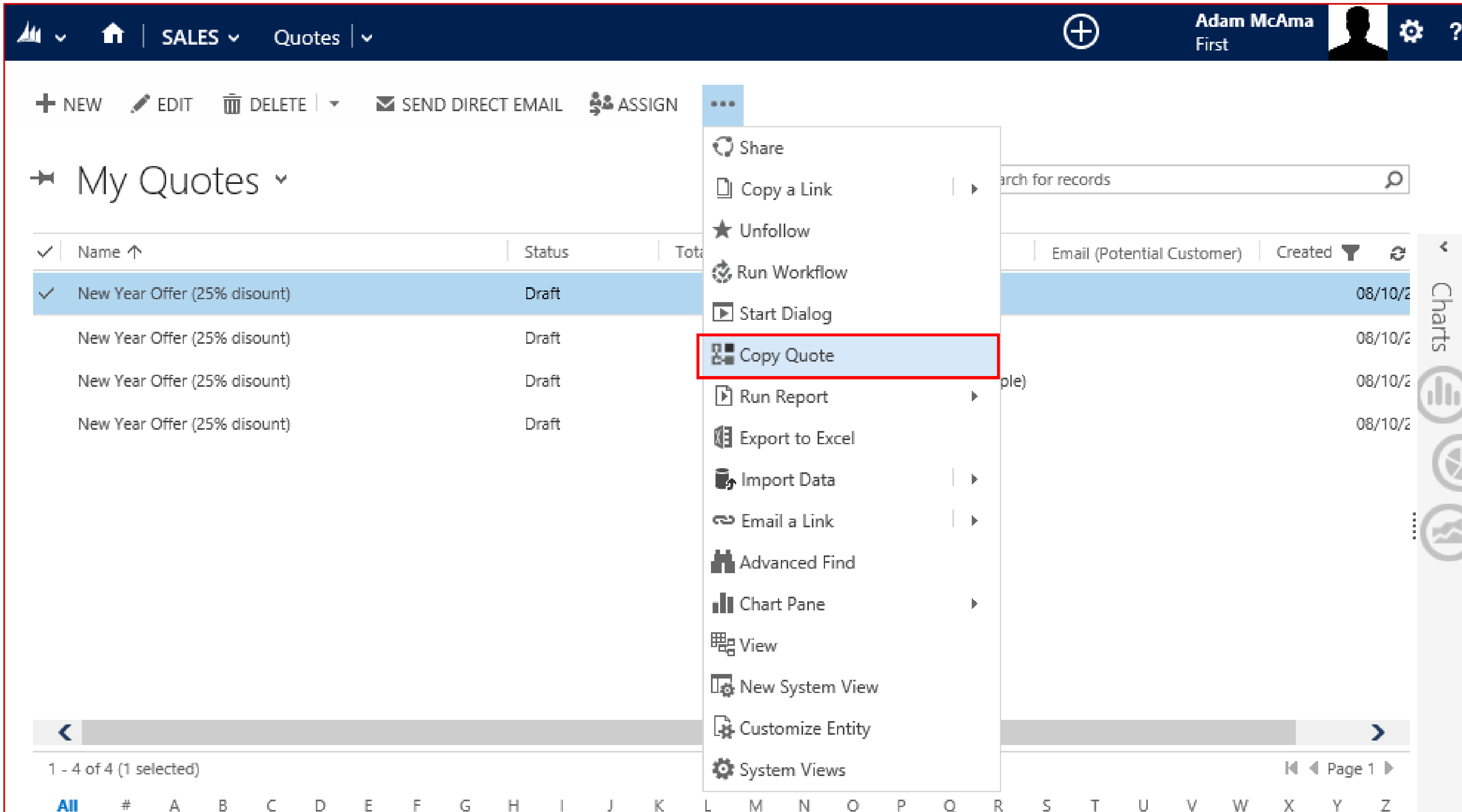


Keep this selected to open newly created record

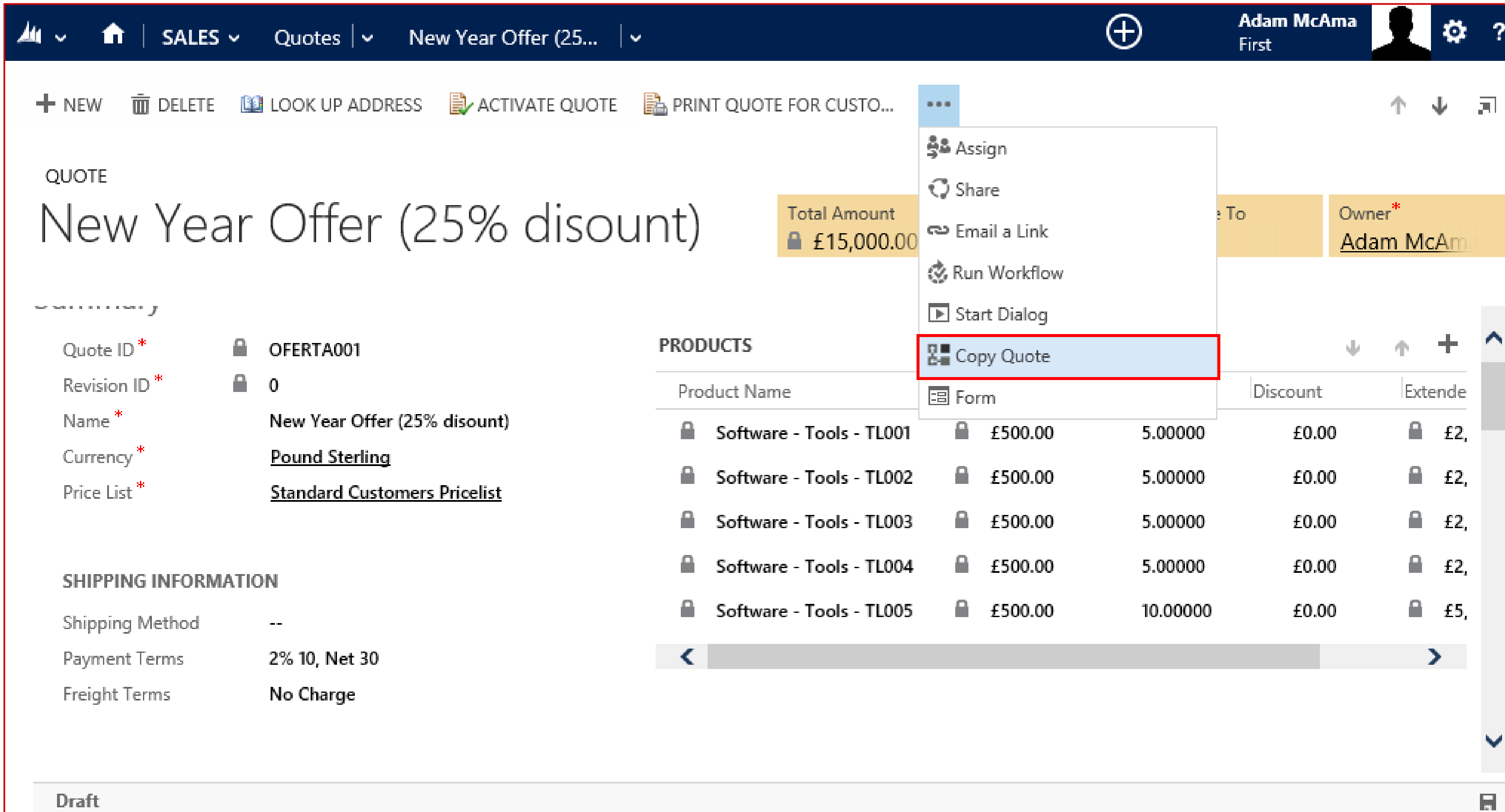
Use Copy button to continue

COPY QUOTE

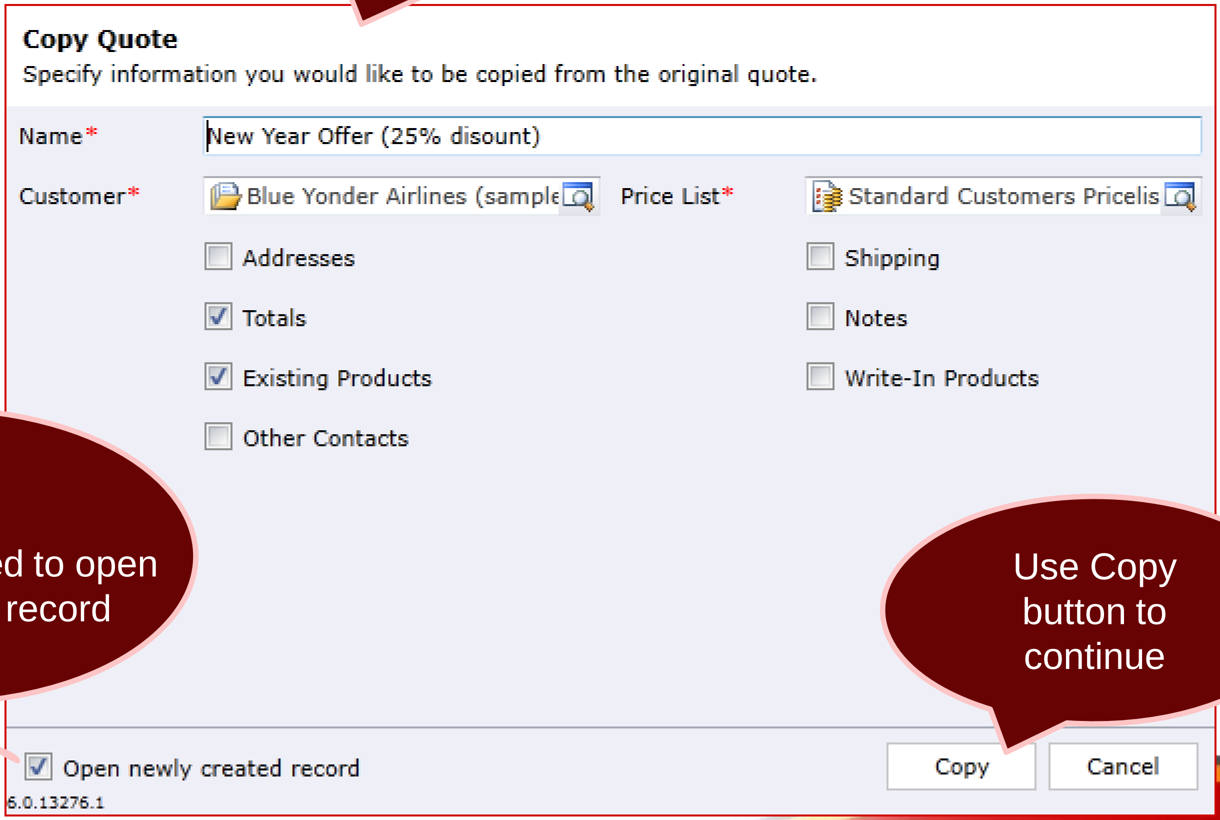
Select source Quote from a list view and Use" Copy Quote" button.



Copy Tool can also be used from a record level.



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

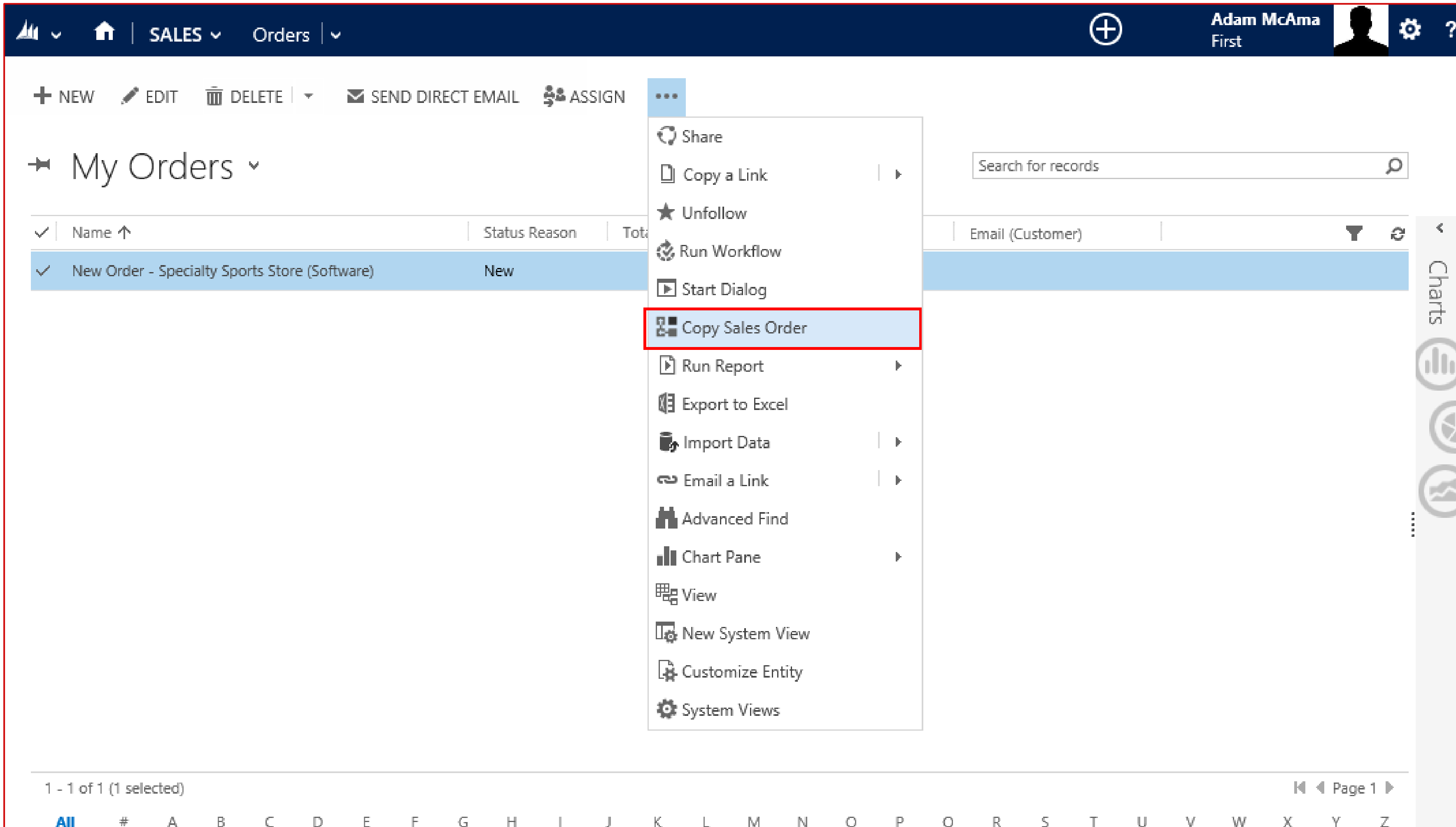


Keep this selected to open newly created record

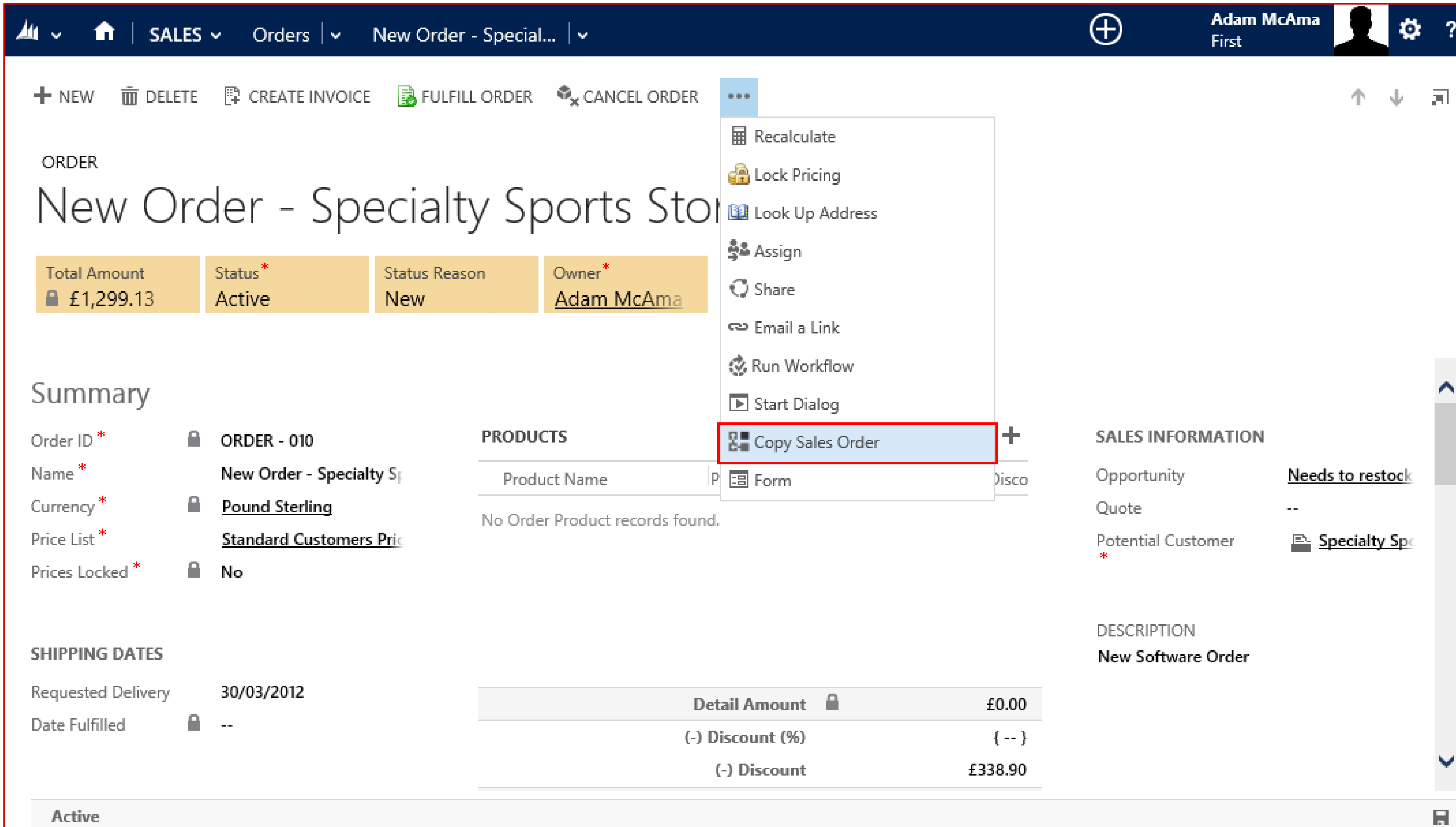
Use Copy button to continue

COPY ORDER

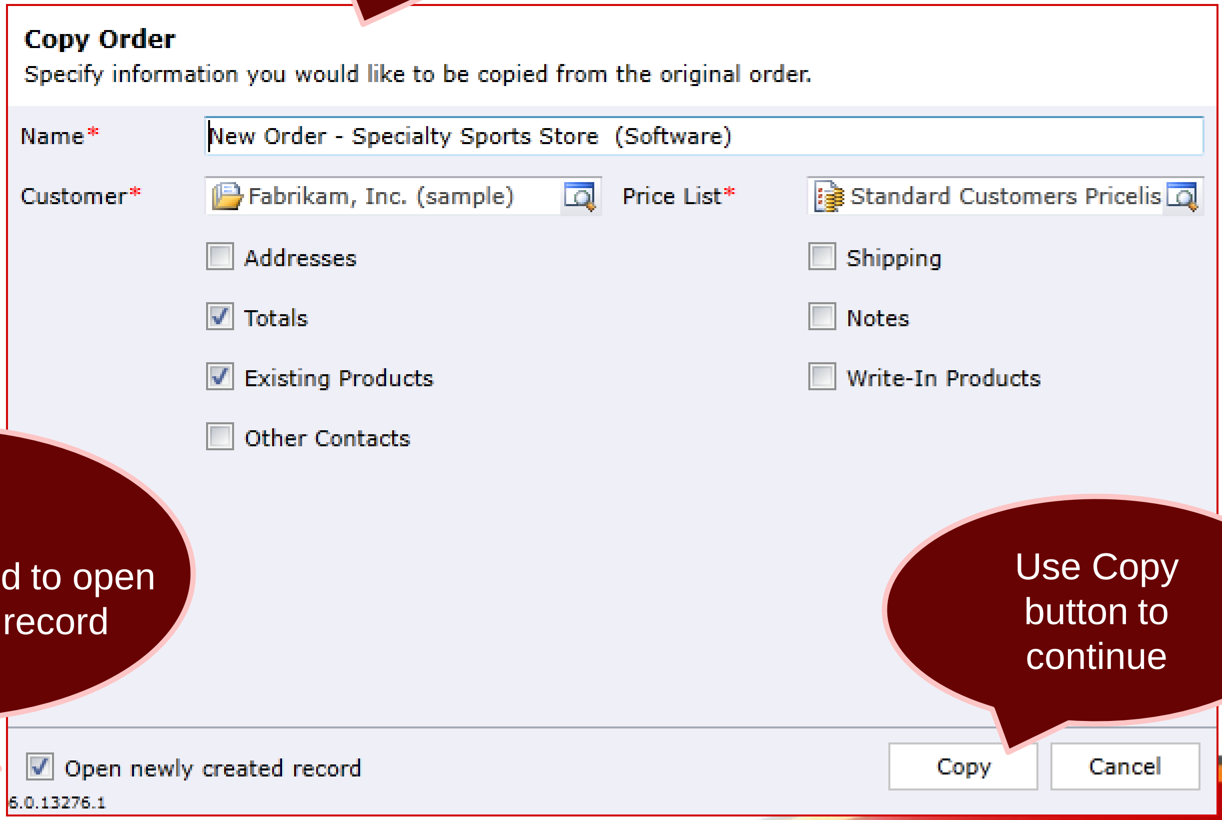
Select source Sales Order from a list view and Use" Copy Sales Order" button.



Copy Tool can also be used from a record level.



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

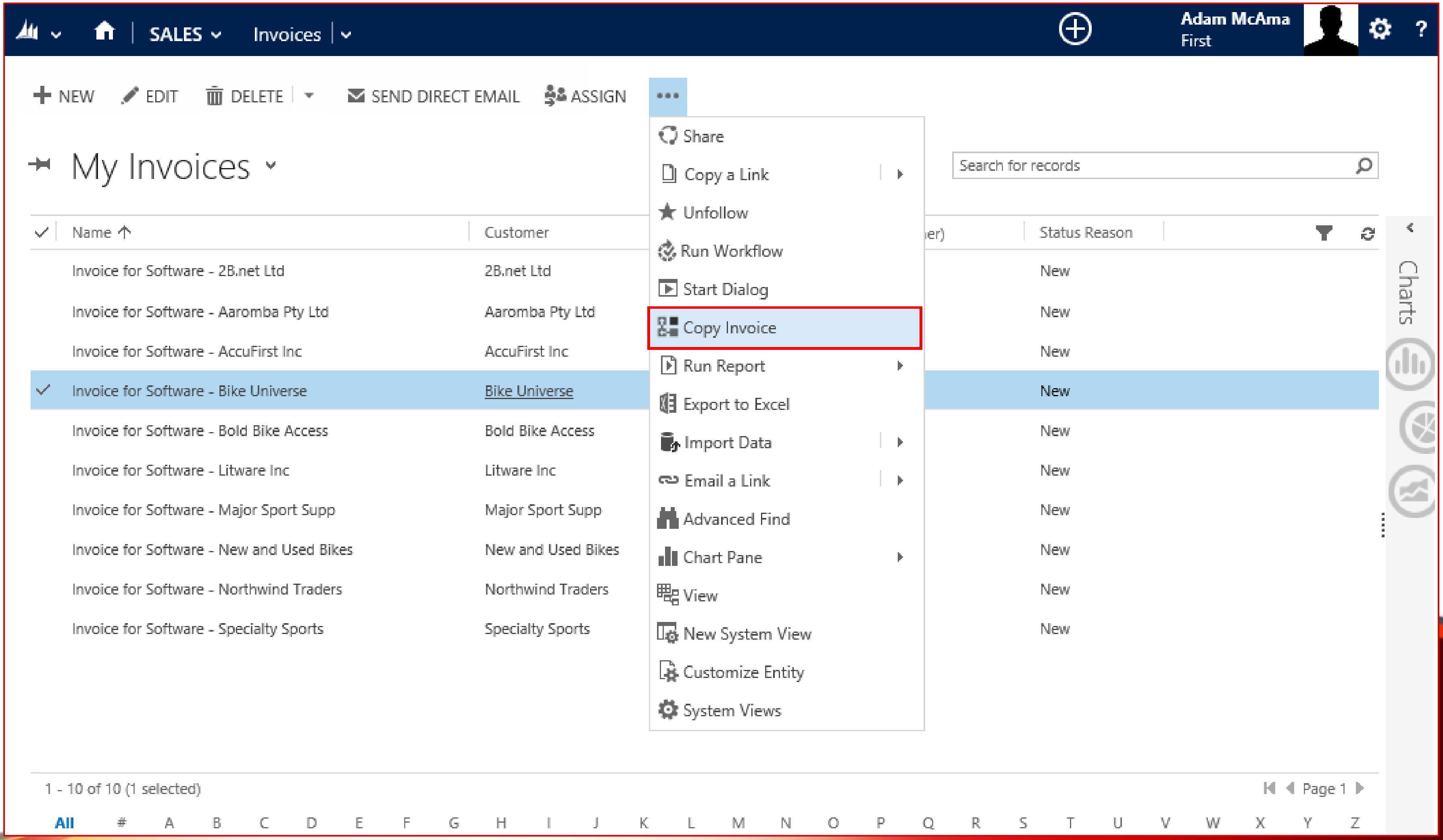


Keep this selected to open newly created record

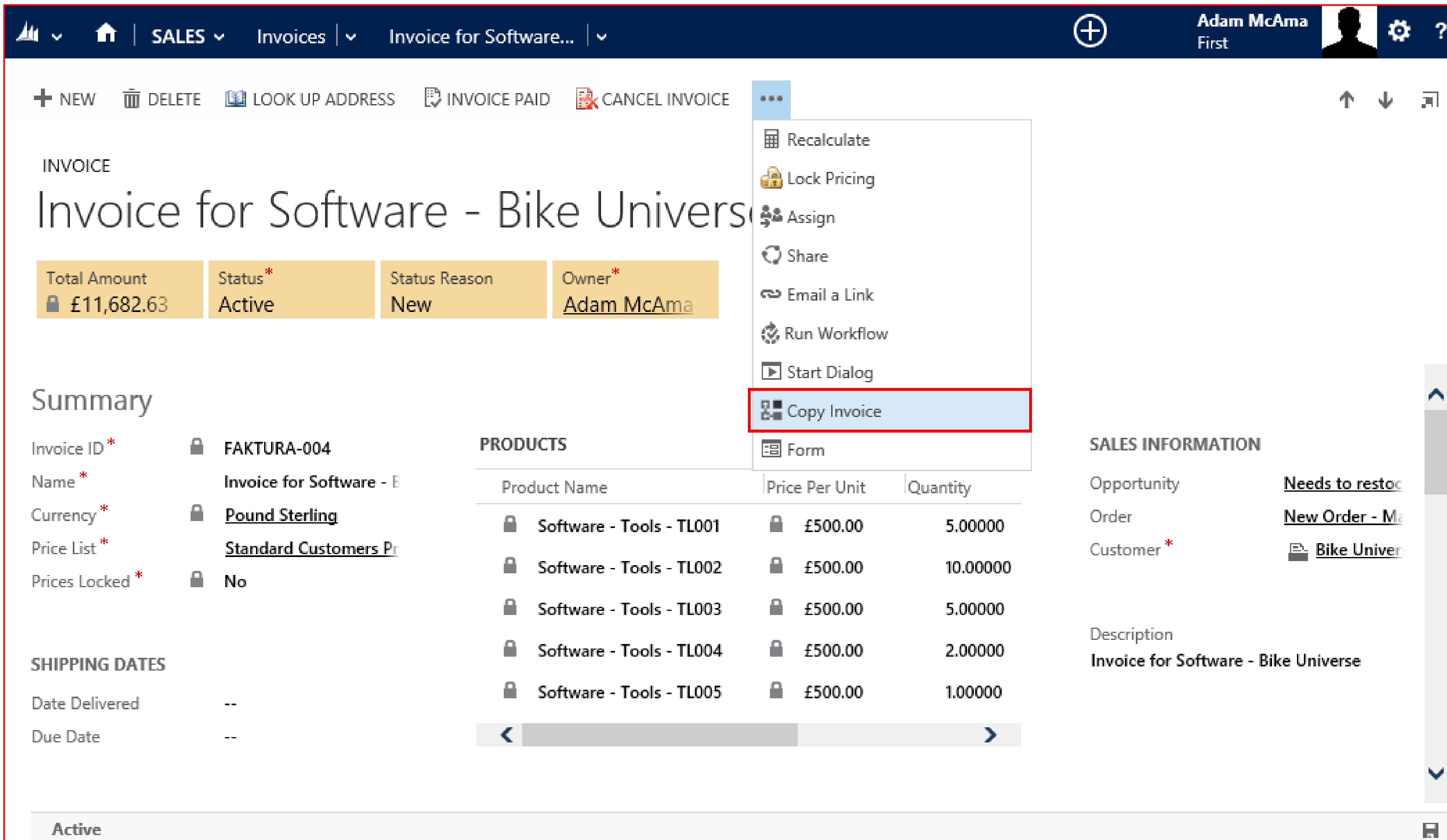
Use Copy button to continue

COPY INVOICE

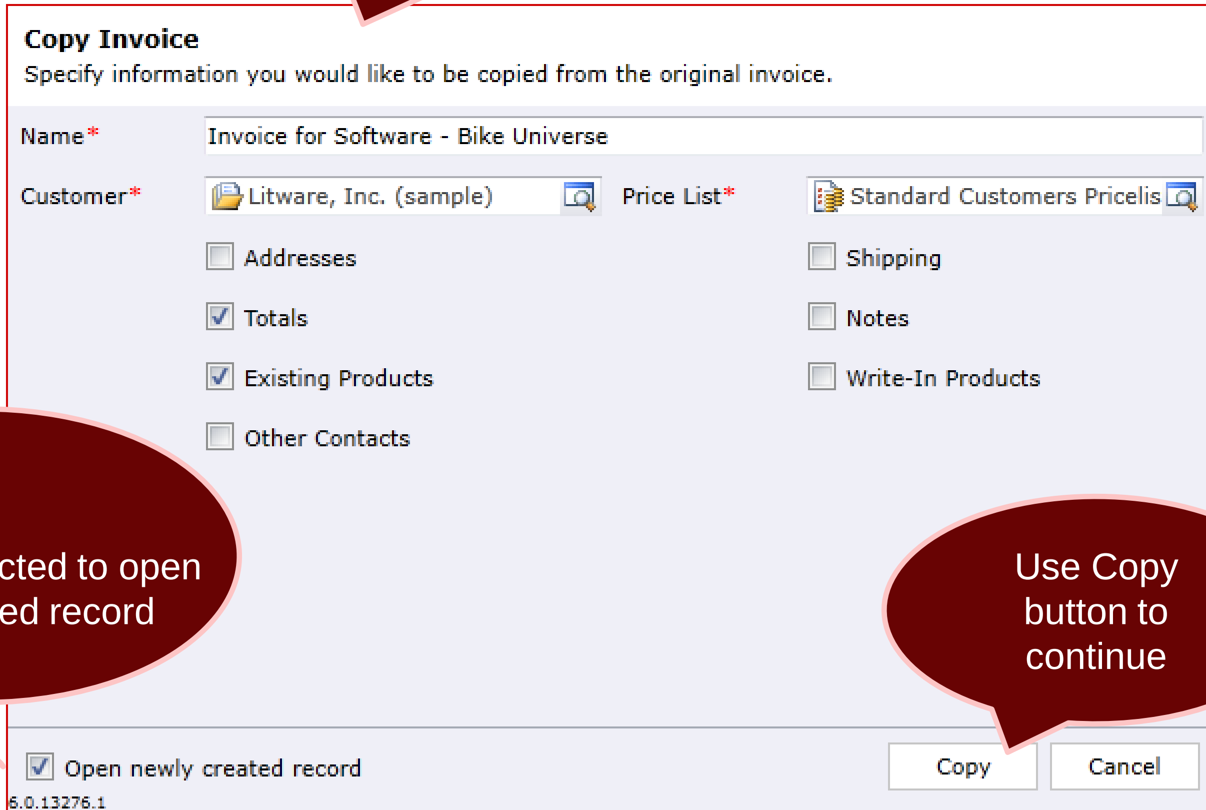
Select source Invoice from a list view and Use" Copy Invoice" button.



Copy Tool can also be used from a record level.



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

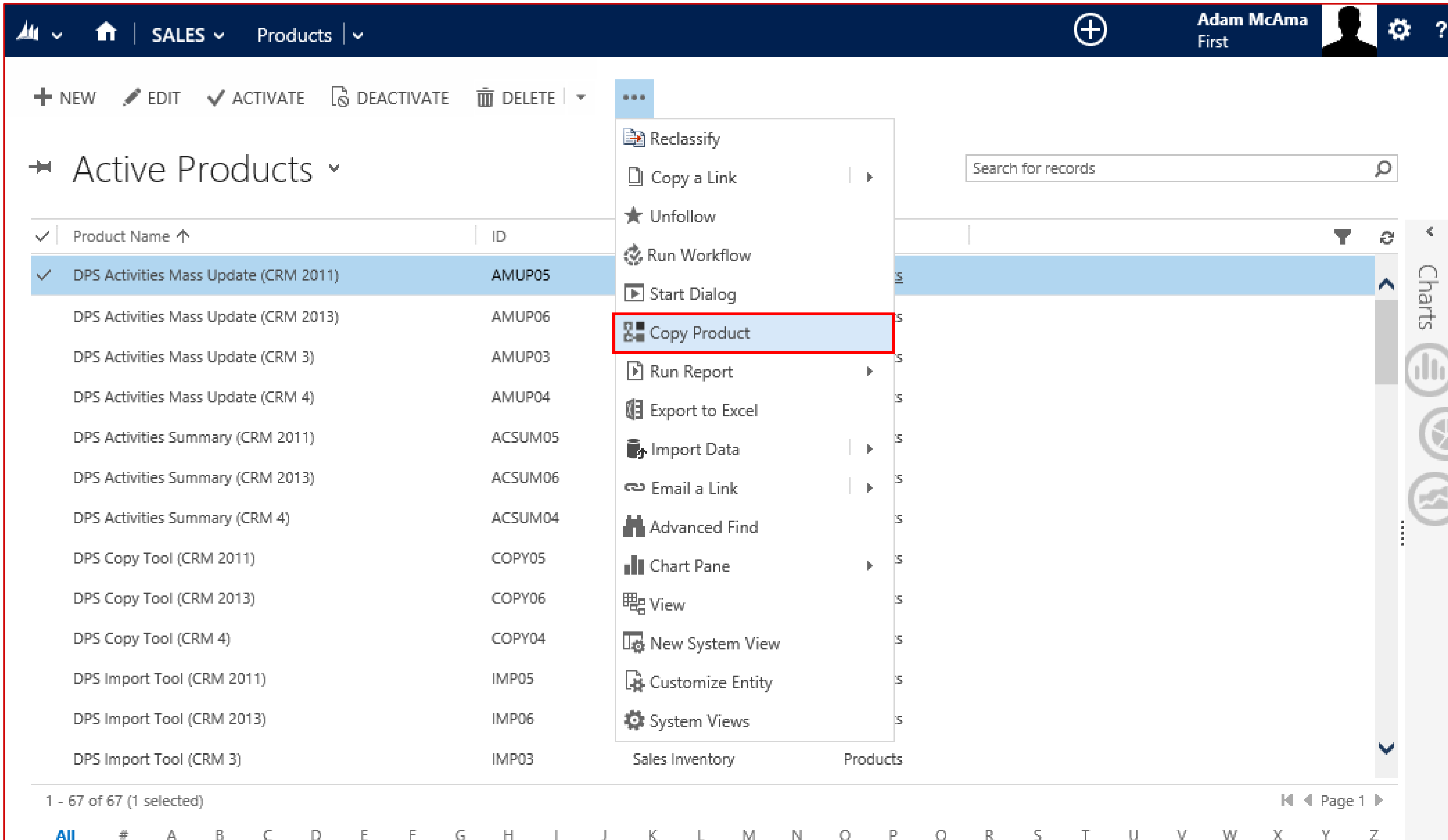


Keep this selected to open newly created record

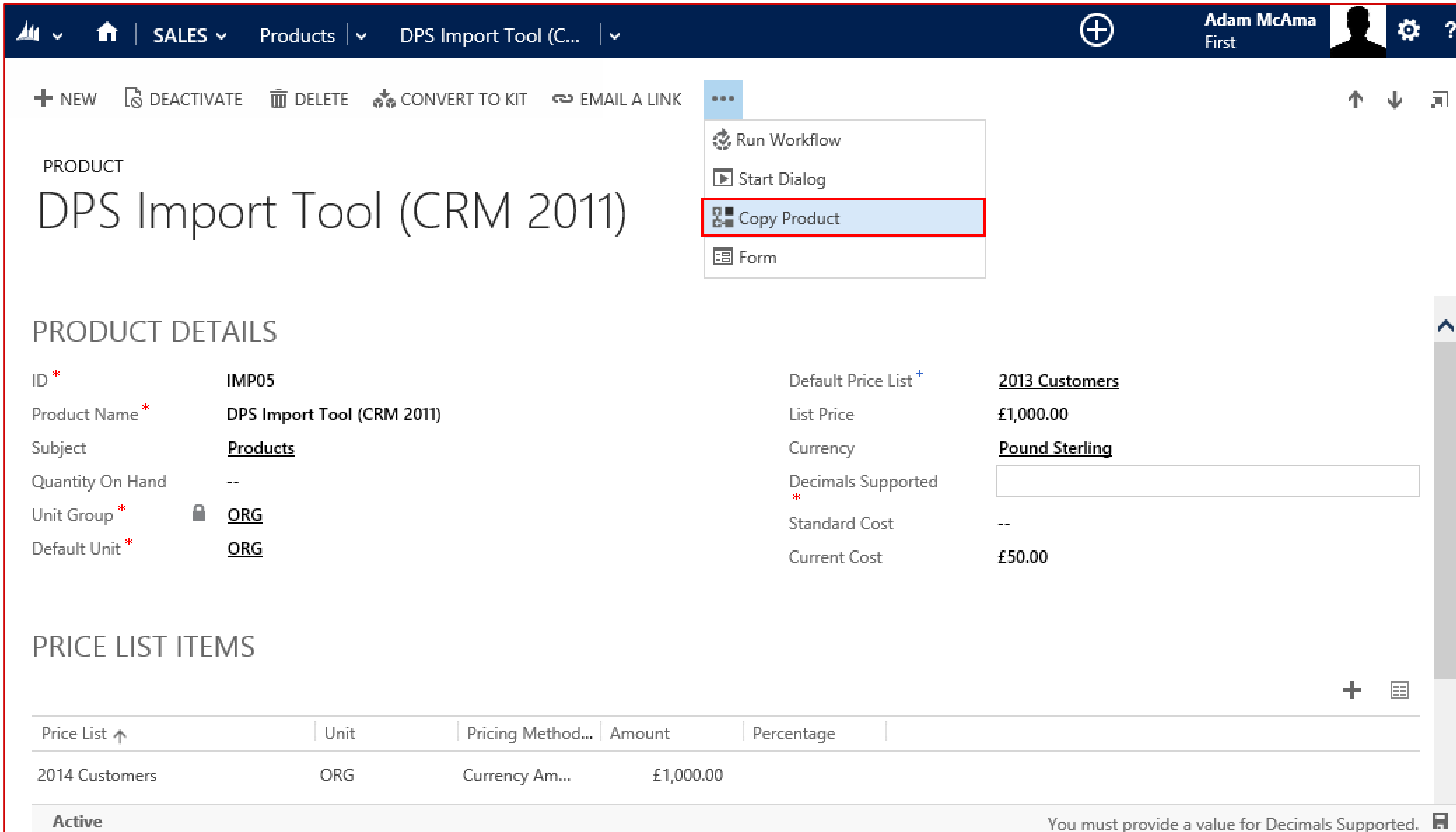
Use Copy button to continue

COPY PRODUCT

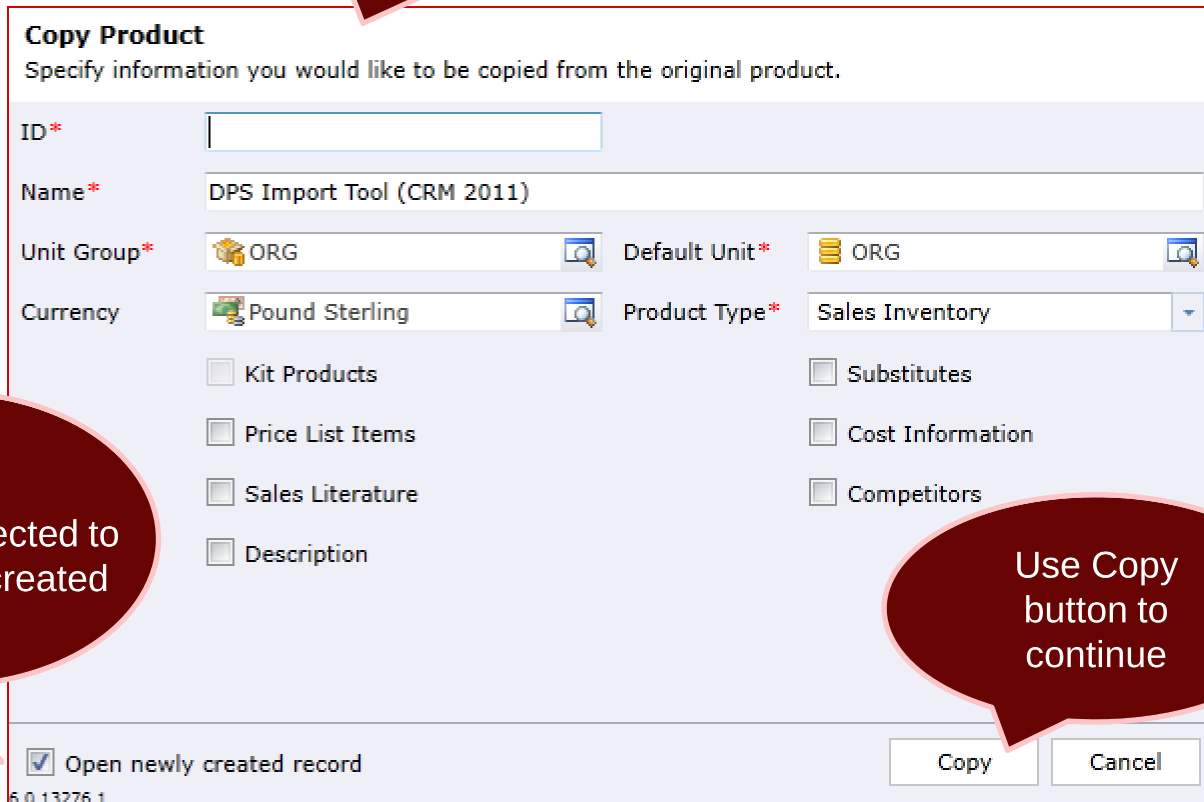
Select source Product from a list view and Use" Copy Product" button.



Copy Tool can also be used from a record level.



Specify information you want to copy to a new product.



Keep this selected to open newly created record

Use Copy button to continue

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Thank You!

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