



Copy Tool

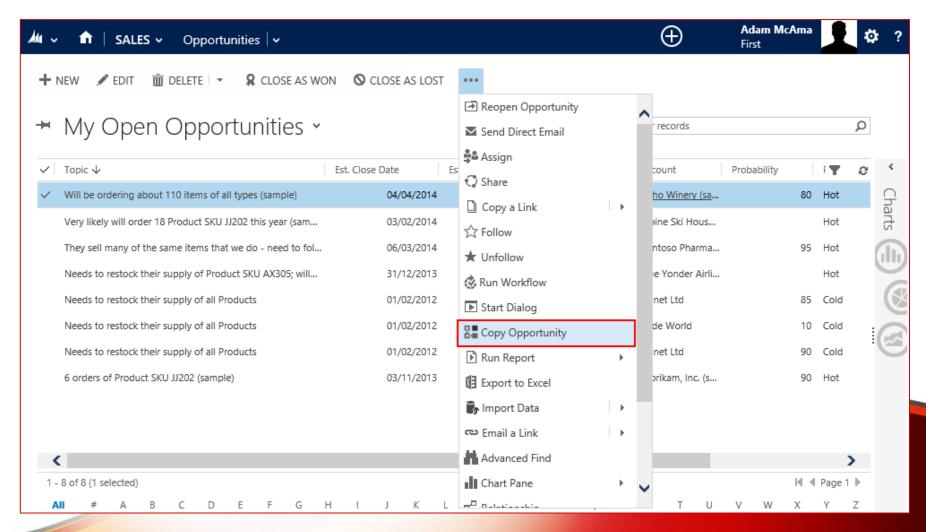
- Copy Tool simplifies creation of sales documents in the Dynamics CRM.
- You can create a new document by copying information from the selected document.
- When using a copy function you can specify what information should be copied to the new record.



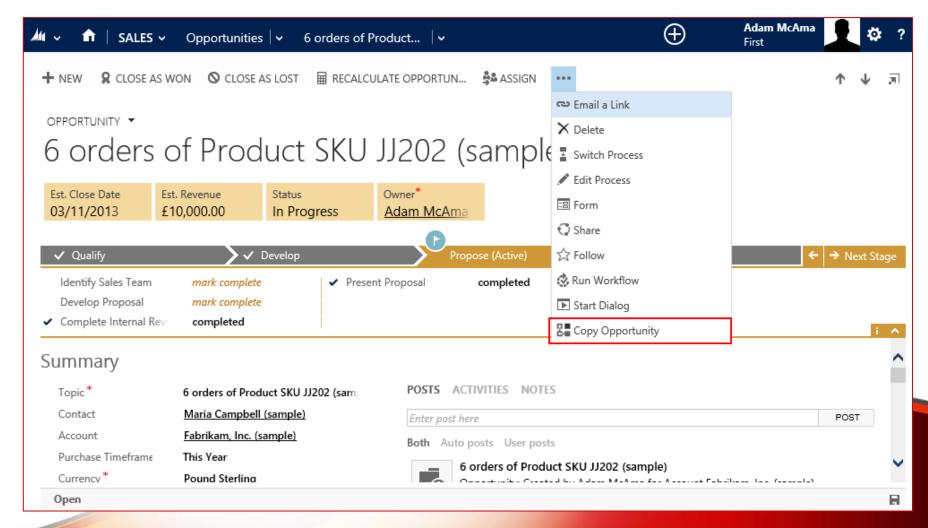
COPY OPPORTUNITY



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









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

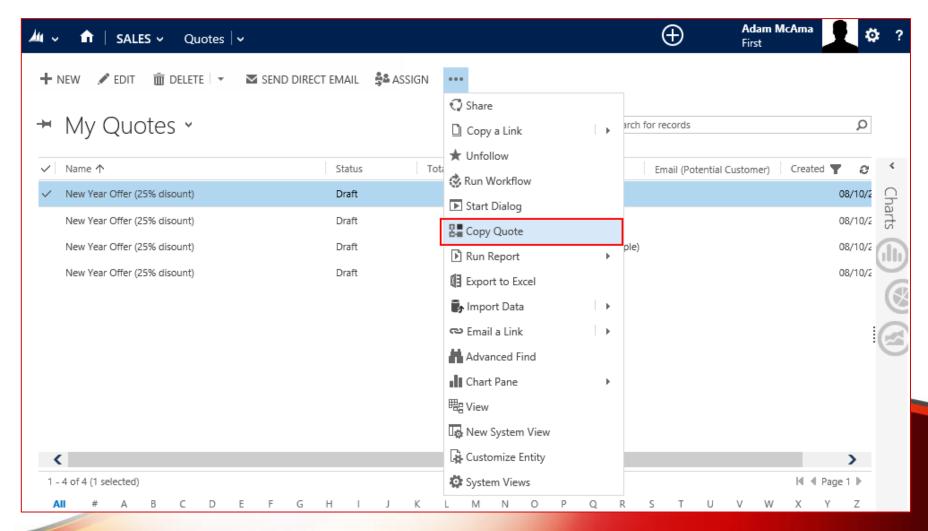




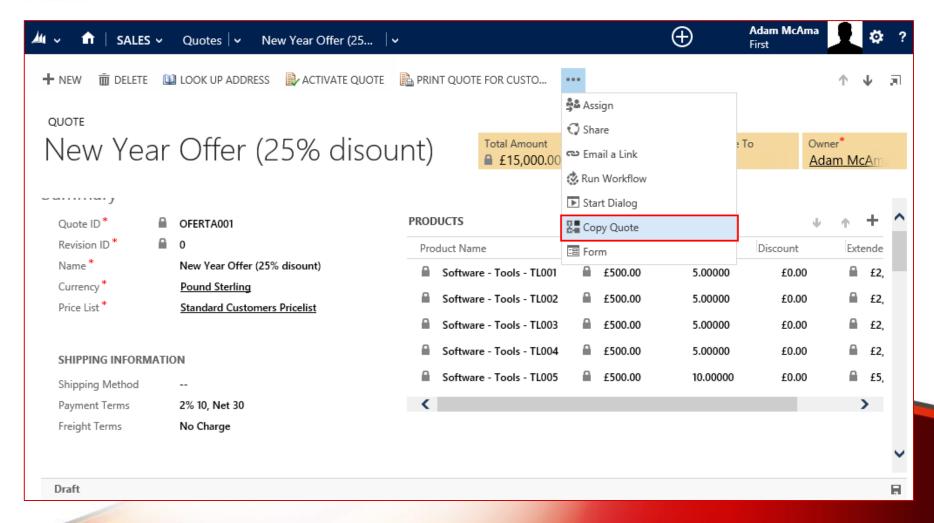
COPY QUOTE



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









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

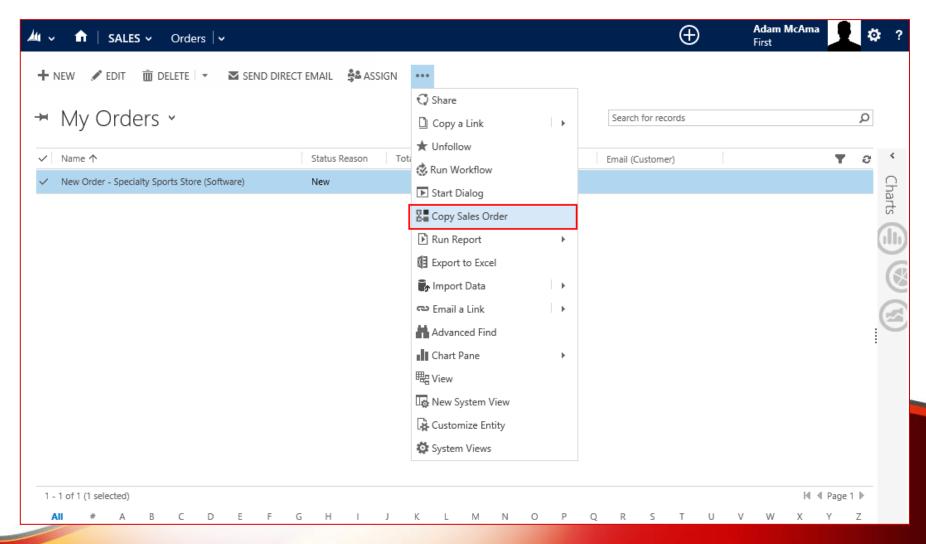




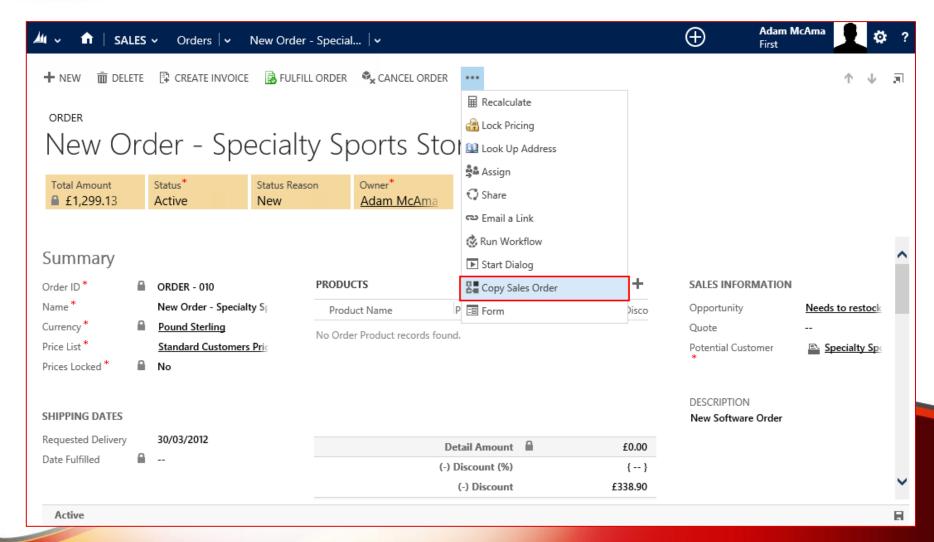
COPY ORDER



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









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

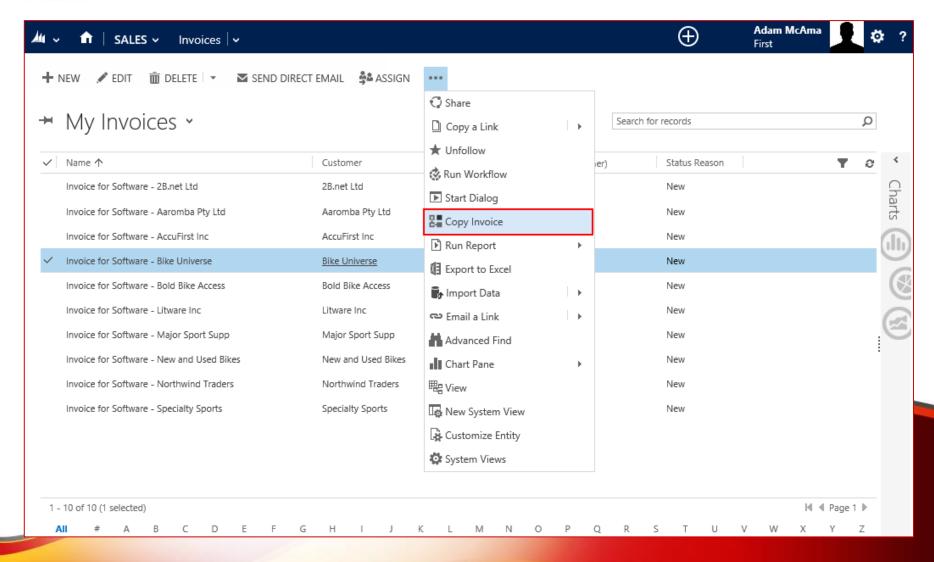




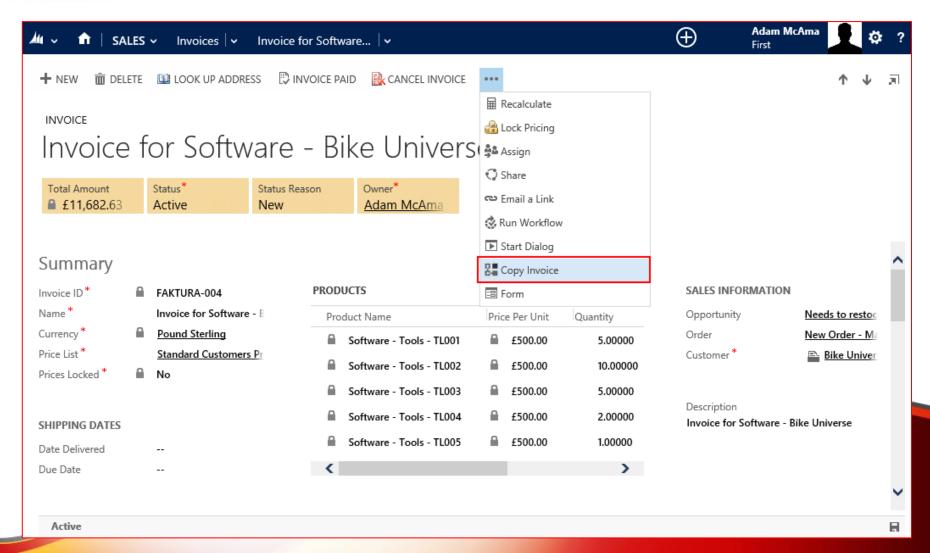
COPY INVOICE



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









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

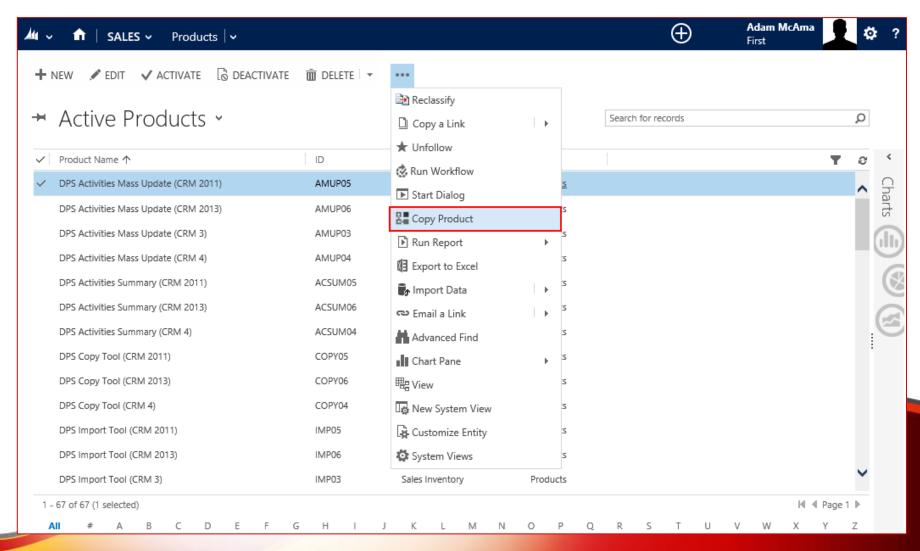




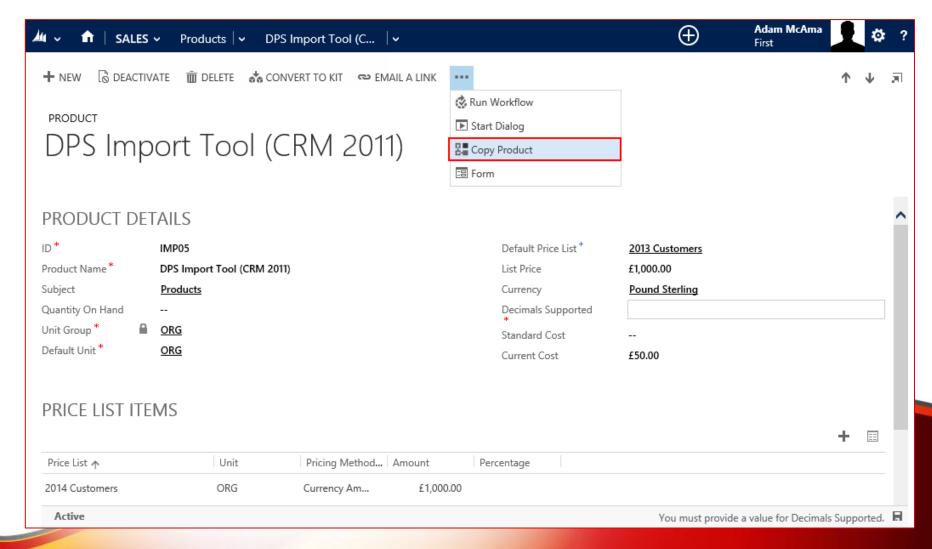
COPY PRODUCT



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









Specify information you want to copy to a new product.

<u> </u>						
	Copy Product Specify information you would like to be copied from the original product.					
	ID*					
	Name*	DPS Import Tool (CRM 2011)				
	Unit Group*	% ORG	٩	Default Unit*	ORG	Q
	Currency	Pound Sterling	Q	Product Type*	Sales Inventory	-
		Kit Products			Substitutes	
		Price List Items			Cost Informat	ion
		Sales Literature			Competitors	
eep this selected to pen newly created record		Description				Use Copy button to continue
	Open newly 5.0.13276.1	created record			Сору	Cancel



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