



Copy Tool

For Dynamics CRM 2015



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

NEW EDIT DELETE CLOSE AS WON CLOSE AS LOST REOPEN OPPORTUNITY SEND DIRECT EMAIL

My Open Opportunities

Topic	Est. Close Date	Est. Revenue	Contact	Account
Will be ordering about 110 items of all types (sample)	6/14/2015	£25,000.00	Jim Glynn (samp...	Coho Winery (sa...
They sell many of the same items that we do - need to fol...	5/16/2015	£26,000.00	Robert Lyon (sa...	Contoso Pharma...
Very likely will order 18 Product SKU JJ202 this year (sam...	4/13/2015	£30,000.00	Paul Cannon (sa...	Alpine Ski Hous...
Needs to restock their supply of Product SKU AX305; will...	3/10/2015	£25,000.00	Sidney Higa (sa...	Blue Yonder Airi...
6 orders of Product SKU JJ202 (sample)	1/13/2015	£10,000.00	Maria Campbell...	Fabrikam, Inc. (s...
Sales Opportunit 1	2/1/2012	£12,000.00		2B.net Ltd
Sales Opportunit 2	2/1/2012	£12,000.00		Aaromba Pty Ltd
Sales Opportunit 3	2/1/2012	£12,000.00		AccuFirst Inc
Sales Opportunit 4	2/1/2012	£12,000.00		Bike Universe
Sales Opportunit 5	2/1/2012	£12,000.00		Bold Bike Access
Sales Opportunit 6	2/1/2012	£78,459.23		Litware Inc
Sales Opportunit 7	2/1/2012	£15,564.26		Major Sport Supp
Sales Opportunit 8	2/1/2012	£15,564.26		New and Used B...

1 - 15 of 15 (1 selected) Page 1

Copy Opportunity



Copy Tool can also be used from a record level.

Microsoft Dynamics CRM | SALES | Opportunities | Will be ordering ab... | Create | Adam McAm First

NEW | CLOSE AS WON | CLOSE AS LOST | RECALCULATE OPPORTUN... | ASSIGN | EMAIL A LINK | DELETE | ...

OPPORTUNITY

Will be ordering about 110 items of all types (sample)

Est. Close Date: 6/14/2015 | Est. Revenue: £25,000.00 | Status: In Progress | Owner: Adam McAm

Qualify (Active) | Develop | Propose | Next Stage

Identify Contact	Jim Glynn (sample)	Estimated Budget	£6,000.00
Identify Account	Coho Winery (sample)	Purchase Process	Committee
Purchase Timeframe	Unknown	Identify Decision Maker	completed

Switch Process | Edit Process | Form | Share | Follow | Run Workflow | Start Dialog | **Copy Opportunity** | Run Report

Summary

Topic	Will be ordering about 110 i
Contact	Jim Glynn (sample)
Account	Coho Winery (sample)
Purchase Timeframe	Unknown
Currency	Pound Sterling
Budget Amount	£6,000.00
Purchase Process	Committee
Description	--
Current Situation	--

POSTS | ACTIVITIES | NOTES

Enter post here | POST

Both | Auto posts | User posts

Will be ordering about 110 items of all types (sample)
Opportunity: Created by Iza Iza for Account Coho Winery (sample).
On Will be ordering about 110 items of all types (sample)'s wall
12/12/2014 11:49 AM

STAKEHOLDERS

No stakeholders found.

Open



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* Litware, Inc. (sample) Price List 2015 US Partners

Est. Revenue Notes

Existing Products Write-In Products

Competitors

Navigate to newly created record

7.0.14335.1

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 the Microsoft Dynamics CRM interface. At the top, there is a navigation bar with 'SALES' and 'Quotes' tabs. The user's name 'Adam McAma' is visible in the top right. Below the navigation bar, there are action buttons: '+ NEW', 'EDIT', 'DELETE', 'SEND DIRECT EMAIL', and 'ASSIGN'. A context menu is open over a selected quote, listing various actions. The 'Copy Quote' option is highlighted with a red box. The background shows a list view of quotes with columns for Name, Status, and Total. The selected quote is 'New Year Offer (25% discount)' with a status of 'Draft'. The bottom of the screen shows a grid of letters for navigation and a page indicator 'Page 1'.

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 the Microsoft Dynamics CRM interface. At the top, the navigation bar includes 'SALES' and 'Orders'. The user is identified as 'Adam McAma First'. 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 Orders'. The list has columns for 'Name', 'Status Reason', and 'Total'. One record is selected: 'New Order - Specialty Sports Store (Software)' with a status of 'New'. A context menu is open over this record, listing various actions. The 'Copy Sales Order' option is highlighted with a red rectangular box. Other options in the menu 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'. On the right side, there is a search box 'Search for records' and a 'Charts' sidebar with various chart icons. At the bottom, the status bar shows '1 - 1 of 1 (1 selected)' and 'Page 1'.



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 Store

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

Summary

Order ID: ORDER - 010
Name: New Order - Specialty Sports Store
Currency: Pound Sterling
Price List: Standard Customers Price List
Prices Locked: No

SHIPPING DATES

Requested Delivery: 30/03/2012
Date Fulfilled: --

PRODUCTS

No Order Product records found.

SALES INFORMATION

Opportunity: Needs to restock
Quote: --
Potential Customer: Specialty Sports Store

DESCRIPTION

New Software Order

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

Active

Copy Sales 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-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 Microsoft Dynamics CRM interface. At the top, there is a navigation bar with 'SALES' and 'Products' menus. The user's name 'Adam McAma First' is visible in the top right. Below the navigation bar, there are action buttons: '+ NEW', 'EDIT', 'ACTIVATE', 'DEACTIVATE', and 'DELETE'. The main area displays a list view titled 'Active Products'. The list has columns for 'Product Name' and 'ID'. The first item, 'DPS Activities Mass Update (CRM 2011)' with ID 'AMUP05', is selected. A context menu is open over this item, listing various actions. The 'Copy Product' option is highlighted with a red box. Other options include 'Reclassify', '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'. At the bottom, there is a status bar showing '1 - 67 of 67 (1 selected)' and a keyboard navigation bar with letters A through Z.

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) Adam McAma First

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

Currency Pound Sterling Product Type* Sales Inventory

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



Download : <http://download.dynamics-pros.com>

Support: <http://support.dynamics-pros.com>



Thank You!

www.dynamics-pros.com