



**Copy Tool**



# 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.

Microsoft Dynamics CRM

File Opportunities View Charts Add Customize

New Edit Delete

Close as Won Close as Lost Recalculate Opportunity Send Direct E-mail Connect Assign Share Copy a Link E-mail a Link Run Workflow Start Dialog Copy Opportunity DPS Run Report Import Data Export to Excel Filter Advanced Find

Records Actions Collaborate Process Data

Sales Opportunities Open Opportunities

Topic	Potential Customer	Est. Close Date ▲	Est. Revenue	Probability	Rating
Store is expanding - send new literature (sample)	A B Store				Warm
Will expand their offerings to include some of our pro...	Variety Store (sample)	05/05/2011	£150,000.00	75	Hot
Will order some items soon (sample)	Variety Store (sample)	06/05/2011	£30,000.00	10	Cold
6 orders of Product SKU JJ202 (sample)	Basic Company (sample)	21/05/2011	£10,000.00	90	Hot
Needs to restock their supply of Product SKU AX305; w...	Best o' Things (sample)	19/07/2011	£25,000.00		Hot
Very likely will order 18 Product SKU JJ202 this year (sa...	Elemental Goods (sample)	21/08/2011	£30,000.00		Hot
They sell many of the same items that we do - need to ...	Blue Company (sample)	24/09/2011	£26,000.00	95	Hot
Will be ordering about 110 items of all types (sample)	Litware Inc. (sample)	22/10/2011	£25,000.00	80	Hot
<input checked="" type="checkbox"/> DPS Dynamics CRM Add-Ons	<u>School of Fine Art</u>	31/03/2013	£1,500.00	25	Warm

Leads Opportunities Accounts Contacts Marketing Lists Competitors Products Sales Literature Quotes Orders Invoices Quick Campaigns Goals Goal Metrics Rollup Queries



Copy Tool can also be used from a record level.

Microsoft Dynamics CRM

Adam McAma  
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File Opportunity Add Customize

Save Save & Close Delete Save Actions Collaborate Process Data

Close as Won Close as Lost Recalculate Opportunity Connect Assign Sharing Copy a Link E-mail a Link Run Workflow Start Dialog Copy Opportunity Run Report

Information

- General
- Line Items
- Notes & Activities
- Quotes
- Preferences

Related

- Common
  - Activities
  - Closed Activities
  - Relationships
  - Activities Summary
  - Connections
  - Documents
  - Audit History
- Sales
  - Orders
  - Invoices
  - Competitors
- Processes
  - Workflows
  - Dialog Sessions

Opportunity

DPS Dynamics CRM Add-Ons

Potential Customer Est. Revenue Est. Close Date

School of Fine Art £1,500.00 31/03/2013

General

Topic\* DPS Dynamics CRM Add-Ons

Potential Customer\* School of Fine Art

Description

Forecast Information

Revenue System Calculated User Provided


Est. Revenue £1,500.00 Probability (%) 25

Est. Close Date 31/03/2013 Rating Warm

Currency\* Pound Sterling

Line Items

Price List 2013 Customers




Select new Potential Customer and specify information you want to copy to new document.

### Copy Opportunity

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

Topic\* DPS Dynamics CRM Add-Ons

Potential Customer\*  

<input checked="" type="checkbox"/> Est. Revenue	<input checked="" type="checkbox"/> Notes
<input checked="" type="checkbox"/> Existing Products	<input type="checkbox"/> Write-In Products
<input checked="" type="checkbox"/> Competitors	

☒ Open newly created record

5.0.13049.5

Copy Cancel

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.

Microsoft Dynamics CRM

File Quotes View Charts Add Customize

New Edit Delete Send Direct E-mail Connect Assign Share Copy a Link E-mail a Link Run Workflow Start Dialog Copy Quote Run Report Import Data Export to Excel Filter Advanced Find

Records Collaborate Process Data

Sales Sales Literature Quotes Orders Invoices Quick Campaigns Goals Goal Metrics Rollup Queries

Quotes All Quotes

Name	Status	Total Amount	Potential Customer	E-mail (Potential Customer)	Created On
<input checked="" type="checkbox"/> DPS Dynamics CRM Add-Ons	Draft	£1,500.00	<a href="#">School of Fine Art</a>		21/02/2013 20:09
<input type="checkbox"/> New Quote	Draft	£0.00	DPS UK		04/07/2011 21:32
<input type="checkbox"/> New Quote	Draft	£0.00	DPS London		27/11/2012 18:50



Copy Tool can also be used from a record level.

Microsoft Dynamics CRM

File Quote Add Customize

Save Save & Close Delete

Look Up Address Recalculate Get Products Print Quote for Customer Create Order Activate Quote Revise Close Quote Connect Assign Copy a Link E-mail a Link

Run Workflow Start Dialog Copy Quote DPS Run Report

Information

- General
- Shipping
- Addresses
- Administration
- Notes

Related

- Common
  - Quote Products
  - Other Contacts
  - Activities
  - Closed Activities
  - Activities Summary
  - Connections
  - Documents
  - Audit History
- Processes
  - Workflows
  - Dialog Sessions

Quote

DPS Dynamics CRM Add-Ons

Quotes

General

Quote ID \* QUO-01002-K7V5Y5 Revision ID \* 0

Name \* DPS Dynamics CRM Add-Ons

Potential Customer \* School of Fine Art Currency \* Pound Sterling

Price List \* 2013 Customers

Totals

Detail Amount	£1,500.00
Quote Discount (%)	
Quote Discount	£
Pre-Freight Amount	£1,500.00
Freight Amount	£
Total Tax	£0.00
Total Amount	£1,500.00

Shipping

Dates





Effective From	21/02/2013	Effective To	15/03/2013
Requested Delivery		Due By	

Select value in Customer field and specify information you want to copy to new document.

### Copy Quote

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

Name\* DPS Dynamics CRM Add-Ons

Customer\*  Fourth Coffee  Price List\*  2013 Customers 

☐ Addresses ☒ Shipping

☒ Totals ☒ Notes

☒ Existing Products ☐ Write-In Products

☐ Other Contacts

☒ Open newly created record

5.0.13049.5

Keep this selected to open newly created record

Use Copy button to continue



## **Copy Sales Order**

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

Microsoft Dynamics CRM

File Orders View Charts Add Customize

New Edit Delete Send Direct E-mail Connect Assign Share Copy a Link E-mail a Link Run Workflow Start Dialog Copy Sales Order Run Report Import Data Export to Excel Filter Advanced Find

Records Collaborate Process Data

Sales

Leads Opportunities Accounts Contacts Marketing Lists Competitors Products Sales Literature Quotes Orders Invoices Quick Campaigns Goals Goal Metrics Rollup Queries

Orders All Orders

Name ▲	Status Reason	Total Amount	Customer	E-mail (Customer)
<input checked="" type="checkbox"/> DPS Dynamics CRM Add-Ons	New	£1,500.00	<a href="#">School of Fine Art</a>	
<input type="checkbox"/> New Order	New	£5,000.00	DPS UK	
<input type="checkbox"/> New Order	New	£0.00	DPS London	
<input type="checkbox"/> New Order	New	£5,000.00	Fourth Coffee	
<input type="checkbox"/> New Order	New	£5,000.00	DPS UK	



Copy Tool  
can also be  
used from a  
record level.

Microsoft Dynamics CRM

File Order Add Customize

Save Save & Close Delete

Create Invoice Use Current Pricing Fulfill Order Get Products Cancel Order Look Up Address

Recalculate Connect Assign Sharing Copy a Link E-mail a Link Run Workflow Start Dialog Copy Sales Order Run Report

Save Collaborate Process DPS Data

Information

- General
- Shipping
- Addresses
- Administration
- Notes

Related

- Common
  - Products
  - Other Contacts
  - Activities
  - Closed Activities
  - Activities Summary
  - Connections
  - Audit History
- Sales
  - Invoices
- Processes
  - Workflows
  - Dialog Sessions

Order

DPS Dynamics CRM Add-Ons

Orders

General

Order ID \* ORD-01004-F7G7W3

Name \* DPS Dynamics CRM Add-Ons

Customer \* School of Fine Art

Price List \* 2013 Customers

Currency \* Pound Sterling

Totals

Detail Amount	£1,500.00	Prices Locked *	<input checked="" type="checkbox"/>
Order Discount (%)			
Order Discount	£		
Pre-Freight Amount	£1,500.00		
Freight Amount	£		
Total Tax	£0.00		
Total Amount	£1,500.00		

Shipping

Dates







Select value in Customer field and specify information you want to copy to new document.

### Copy Order

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

Name\* DPS Dynamics CRM Add-Ons

Customer\*  Fourth Coffee  Price List\*  2013 Customers 

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

☒ Open newly created record

5.0.13049.5

**Copy** **Cancel**

Keep this selected to open newly created record

Use Copy button to continue



**Copy Invoice**

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

Microsoft Dynamics CRM

Adam McAma  
Dynamics Professional Solutions Ltd  
Sign Out

File Invoices View Charts Add Customize

Records: New Edit Delete

Collaborate: Send Direct E-mail Connect Assign Copy a Link E-mail a Link

Process: Run Workflow Start Dialog **Copy Invoice** DPS

Data: Run Report Import Data Export to Excel Filter Advanced Find

Sales

- Leads
- Opportunities
- Accounts
- Contacts
- Marketing Lists
- Competitors
- Products
- Sales Literature
- Quotes
- Orders
- Invoices
- Quick Campaigns
- Goals
- Goal Metrics
- Rollup Queries

Workplace

Sales

Marketing

Invoices My Invoices

Search for records

Name	Status Reason	Total Amount	Customer	E-mail (Customer)
DPS Dynamics CRM Add-ons	New	£250.00	School of Fine Art	

Click here to view the chart.

Copy Tool  
can also be  
used from a  
record level.

Microsoft Dynamics CRM

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Dynamics Professional Solutions Ltd

File

Invoice

Add

Customize



Save



Save &  
Close

Save & New



Delete

Save



Invoice  
Paid



Cancel Invoice



Recalculate



Get Products



Lock Pricing



Look Up Address

Actions



Connect



Assign



Sharing



Copy a Link



E-mail a Link

Collaborate



Run  
Workflow



Start  
Dialog



Copy Invoice

DPS



Run  
Report

Data

Information

General

Shipping

Addresses

Administration

Notes

Related

Common

Products

Other Contacts

Activities

Closed Activities

Activities Summary

Connections

Audit History

Processes

Workflows

Dialog Sessions



Invoice

DPS Dynamics CRM Add-ons

Invoices

General

Invoice ID \*

INV-01000-Z0C2J7

Name \*

DPS Dynamics CRM Add-ons

Customer \*

School of Fine Art

Currency \*

Pound Sterling

Price List \*

2013 Customers

Totals

Detail Amount

£250.00

Prices Locked \*



Invoice Discount  
(%)

Invoice Discount

£

Pre-Freight Amount

£250.00

Freight Amount

£

Total Tax

£0.00

Total Amount

£250.00

Shipping

Dates

Date Delivered



Due Date

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

### Copy Invoice

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

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

5.0.13049.5

**Copy** Cancel

Keep this  
selected to  
open newly  
created record

Use Copy  
button to  
continue





# **Copy Products**

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

Microsoft Dynamics CRM

File Products View Charts Add Customize

New Edit Activate Deactivate Delete

Records

Reclassify Copy a Link E-mail a Link

Collaborate

Run Workflow Start Dialog

Process

Copy Product DPS

Run Report Import Data

Data

Export to Excel Filter Advanced Find

Sales

Leads Opportunities Accounts Contacts Marketing Lists Competitors Products Sales Literature Quotes Orders Invoices Quick Campaigns Goals Goal Metrics Rollup Queries

Products Active Products

<input type="checkbox"/>	Product Name ▲	ID	Product Type	Subject
<input type="checkbox"/>	Delrin Ball, 307	ZBALL307D	Sales Inventory	
<input type="checkbox"/>	Delrin Check, 307	ZCH307D	Sales Inventory	
<input type="checkbox"/>	Delrin Seat, 307	ZSEAT307D	Sales Inventory	
<input type="checkbox"/>	Delrin, Diaphragm, 307	ZDIA307D	Sales Inventory	
<input type="checkbox"/>	Delrin, Fluid Covers, 307	ZFC307D	Sales Inventory	
<input type="checkbox"/>	Delrin, Manifold, 307	ZMAN307D	Sales Inventory	
<input type="checkbox"/>	Diamond Fabric	DF-100	Sales Inventory	
<input type="checkbox"/>	Diamond tip insert	DIAMOND 8907	Sales Inventory	
<input type="checkbox"/>	Digital Register	DR146ROHS	Sales Inventory	
<input type="checkbox"/>	Docking Station	DockSt	Sales Inventory	
<input type="checkbox"/>	Double Deck Flow Frame	MB927245	Miscellaneous Charges	
<input type="checkbox"/>	DPS Copy Tool	COPY	Sales Inventory	
<input checked="" type="checkbox"/>	DPS Import Tool	IMP	Sales Inventory	
<input type="checkbox"/>	DPS Price List Tool	PRLU	Sales Inventory	

Copy Tool  
can also be  
used from a  
record level.

Microsoft Dynamics CRM

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File

Product

Add

Customize



Save



Save &  
Close



Deactivate



Delete

Save



Add Price  
List Item



Convert To  
Kit

Actions



Sharing -



Copy a Link



E-mail a Link

Collaborate



Run  
Workflow



Start  
Dialog

Process



Copy  
Product

DPS



Run  
Report

Data

Information

General

Description

Notes

Related

Common



Substitutes



Price List Items



Documents



Audit History



Product Demos

Sales



Sales Literature



Competitors

Processes



Workflows



Dialog Sessions



Product

DPS Import Tool

Products

General

ID \*

IMP

Name \*

DPS Import Tool

Subject



Product Type

Sales Inventory

Unit Group \*

ORG



Quantity On Hand

Default Unit \*

ORG



URL

Currency

Pound Sterling



Costs

Default Price List +

2013 Customers



List Price

£1,000.00

Decimals Supported \*

0

Standard Cost

£

Current Cost

£

Description

Vendor

Stock Weight

Vendor Part  
Number

Stock Volume

### Copy Product

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

ID*	<input type="text" value="IMP_M"/>		
Name*	<input type="text" value="DPS Import Tool - One MODULE"/>		
Unit Group*	<input type="text" value="ORG"/>	Default Unit*	<input type="text" value="ORG"/>
Currency	<input type="text" value="Pound Sterling"/>	Product Type*	<input type="text" value="Sales Inventory"/>
<input type="checkbox"/> Kit Products		<input type="checkbox"/> Substitutes	
<input checked="" type="checkbox"/> Price List Items		<input checked="" type="checkbox"/> Cost Information	
<input type="checkbox"/> Sales Literature		<input type="checkbox"/> Competitors	
<input checked="" type="checkbox"/> Description			
<input checked="" type="checkbox"/> Open newly created record			

5.0.13049.5

Enter Product ID and specify information you want to copy to a new product.

Keep this selected to open newly created record

Use Copy button to continue



- You can use Copy Tool to duplicate following records:
  - **Opportunities**
  - **Quotes**
  - **Orders**
  - **Invoices**
  - **Products**





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