

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.

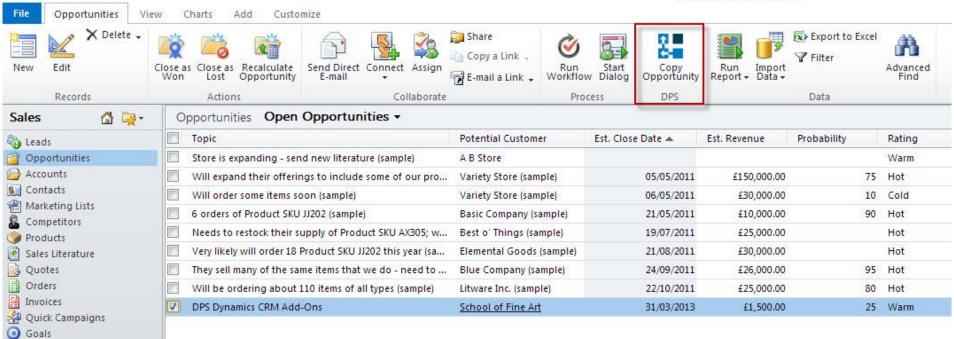


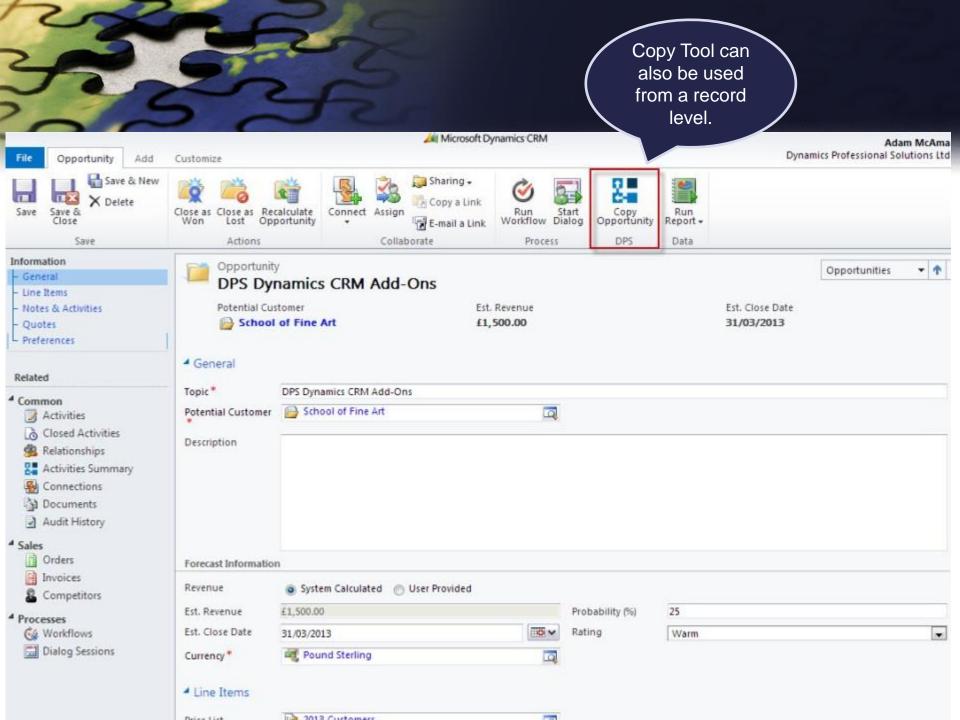
Copy Opportunity



Goal Metrics Rollup Queries Select source
Opportunity from a
list view and Use"
Copy Opportunity"
button.

Microsoft Dynamics CRM



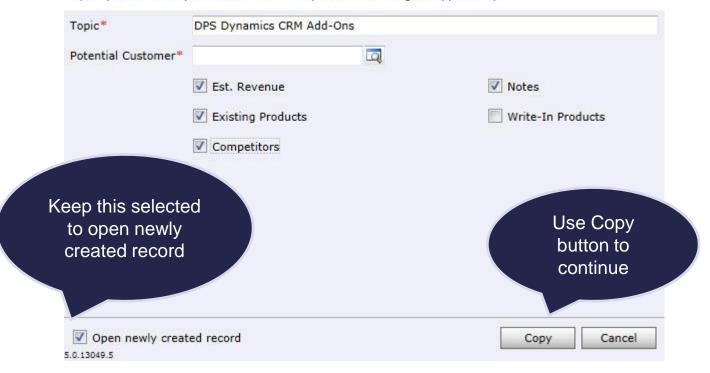




Select new Potential
Customer and
specify information
you want to copy to
new document.

Copy Opportunity

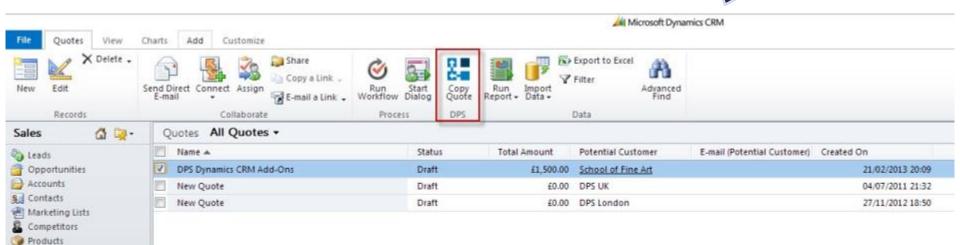
Specify information you would like to be copied from the original opportunity.





Copy Quote

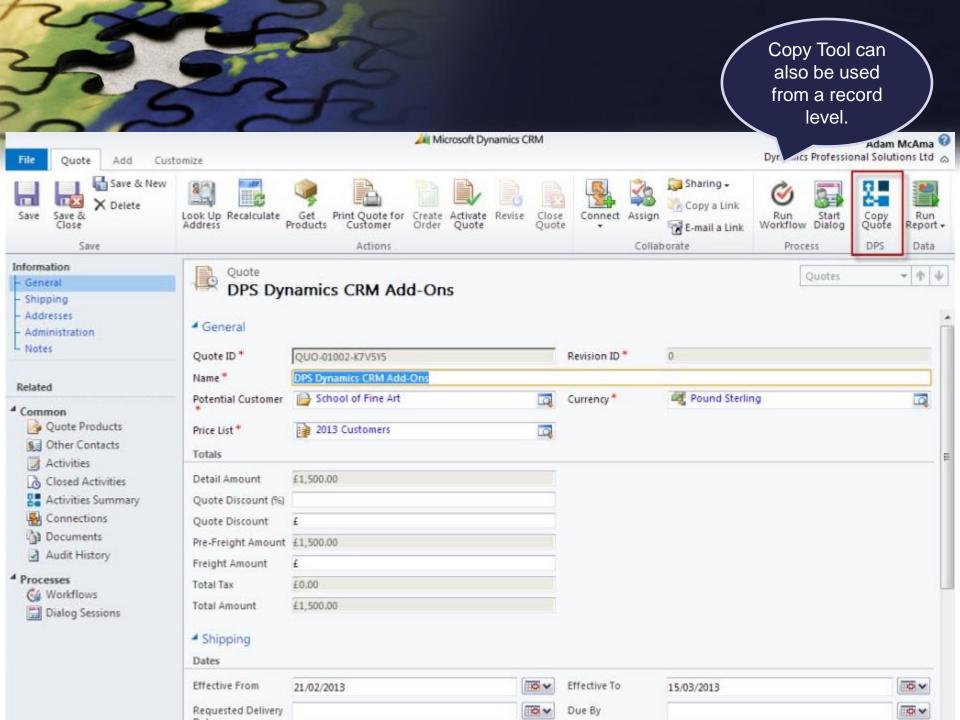


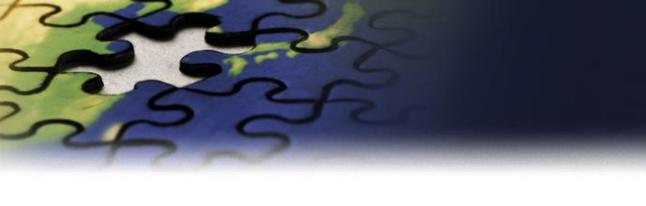


Sales Literature
Quotes
Orders
Invoices
Quick Campaigns

Goal Metrics
Rollup Queries

Goals

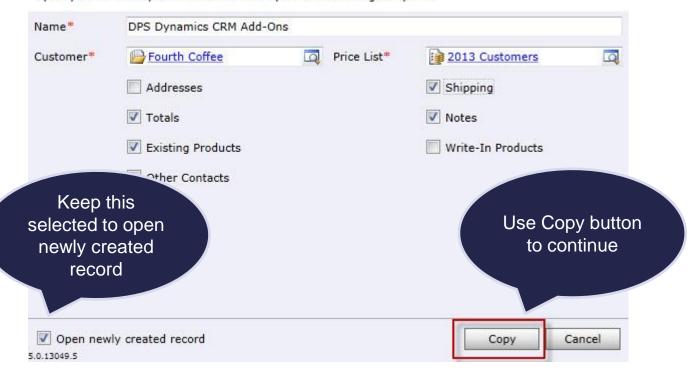




Select value in Customer field and specify information you want to copy to new document.

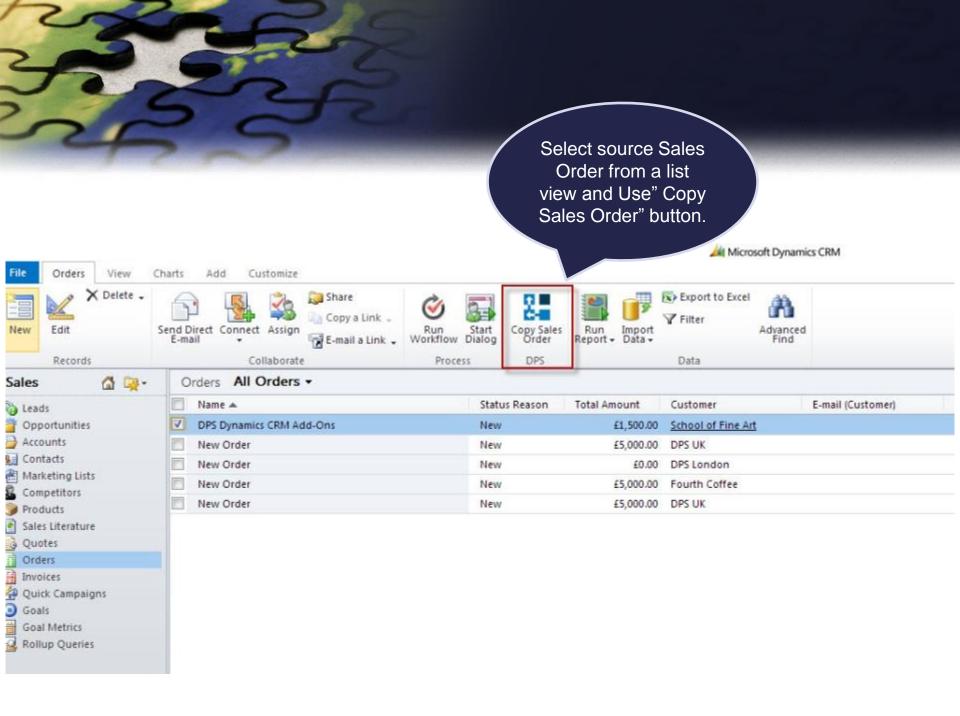
Copy Quote

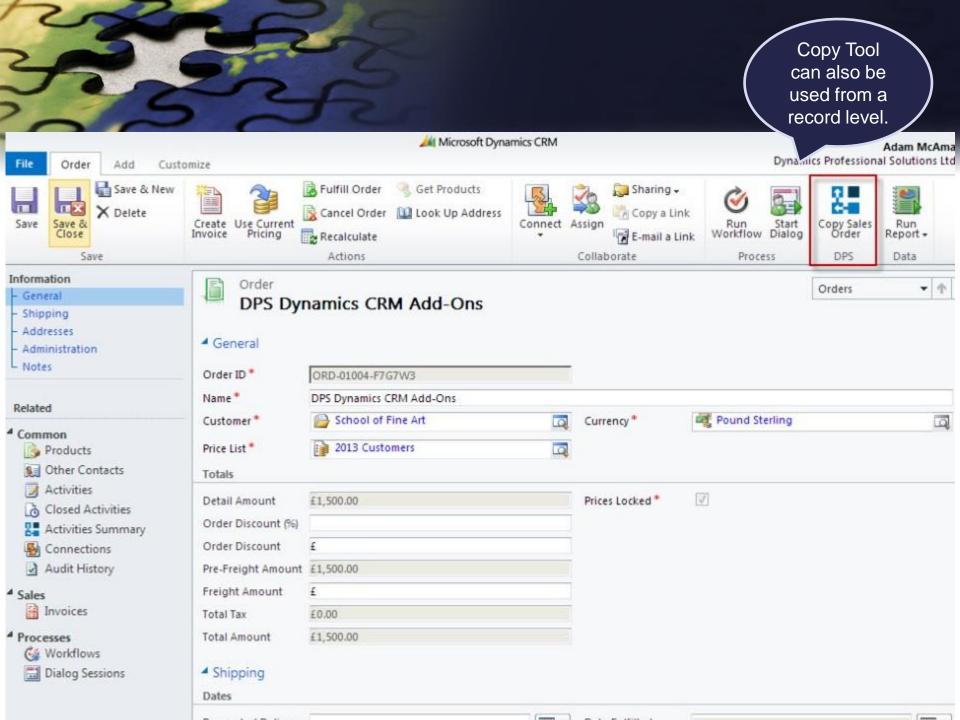
Specify information you would like to be copied from the original quote.

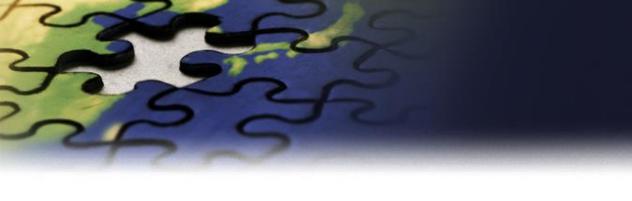




Copy Sales Order



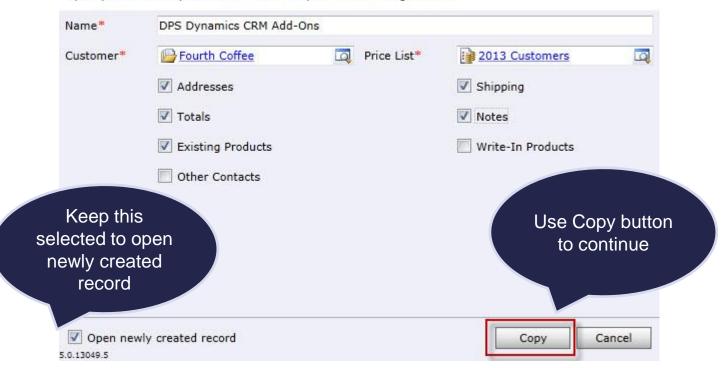




Select value in Customer field and specify information you want to copy to new document.

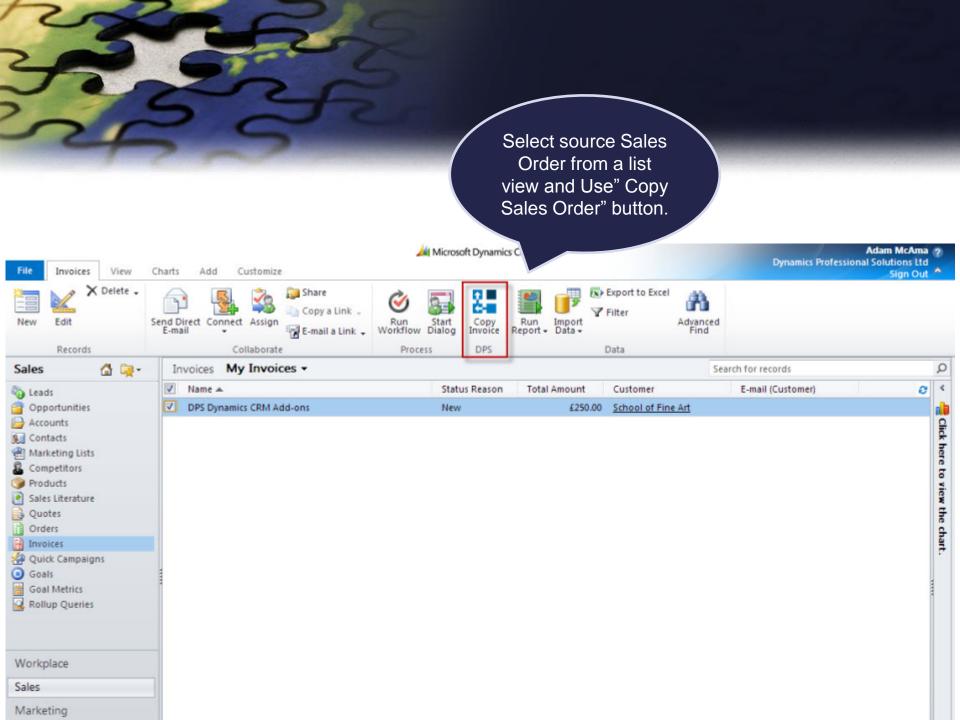
Copy Order

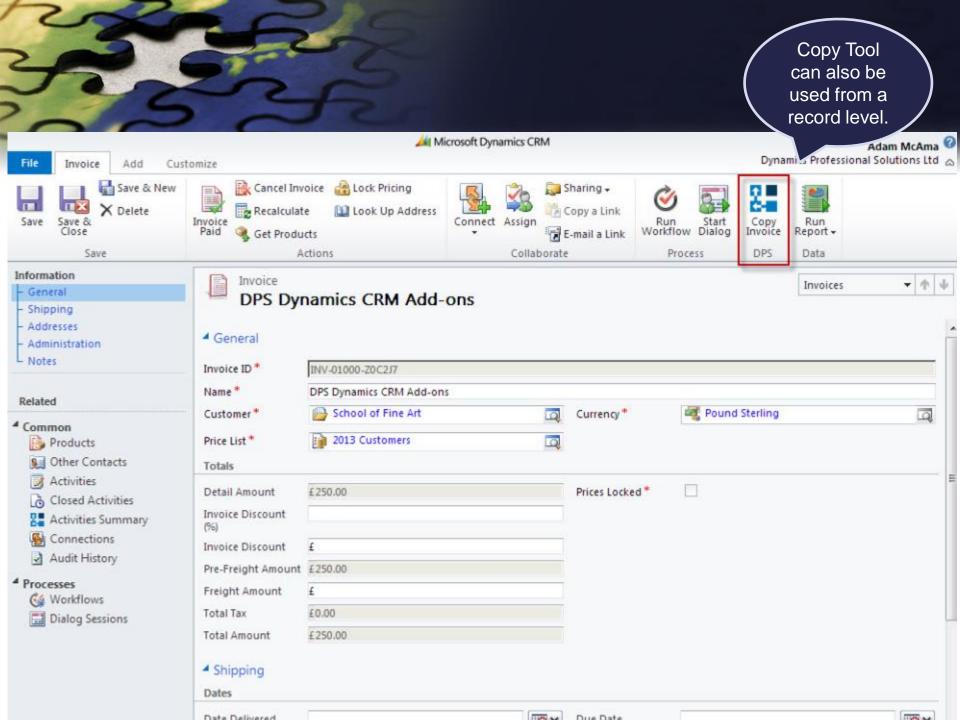
Specify information you would like to be copied from the original order.





Copy Invoice

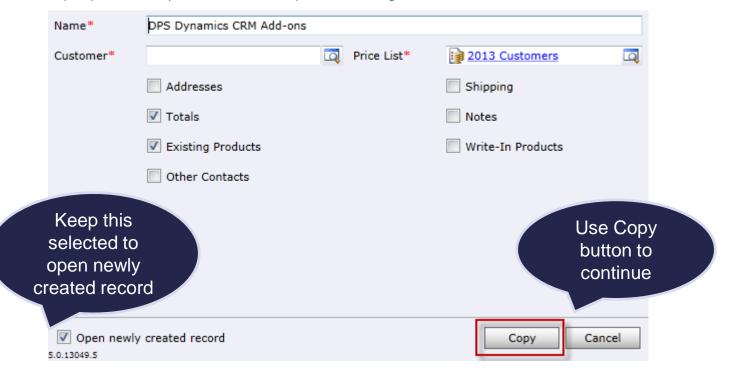






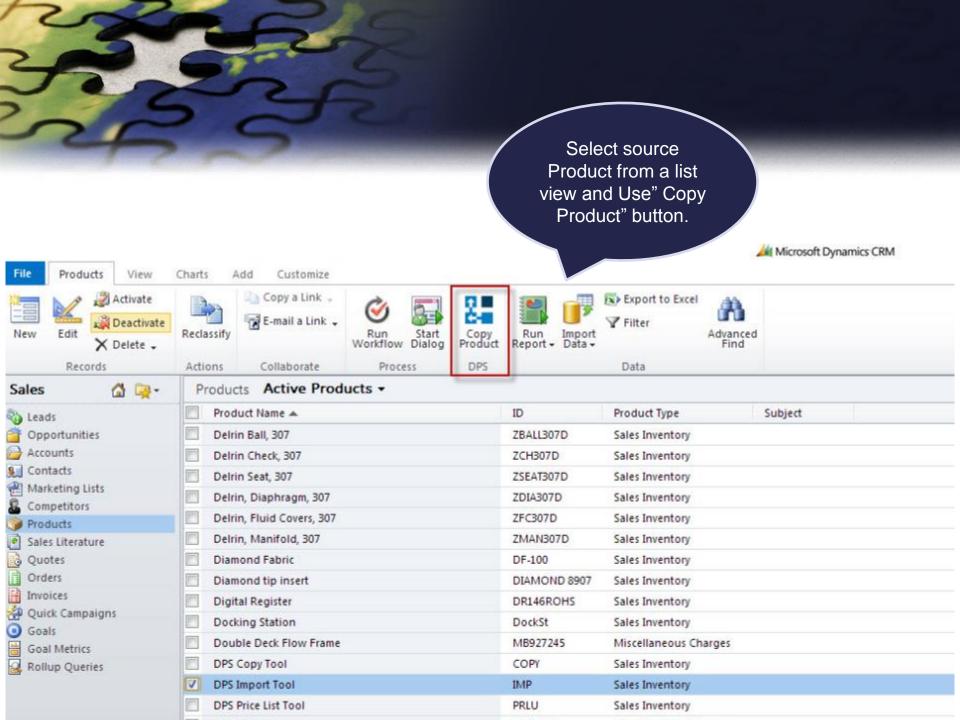
Copy Invoice

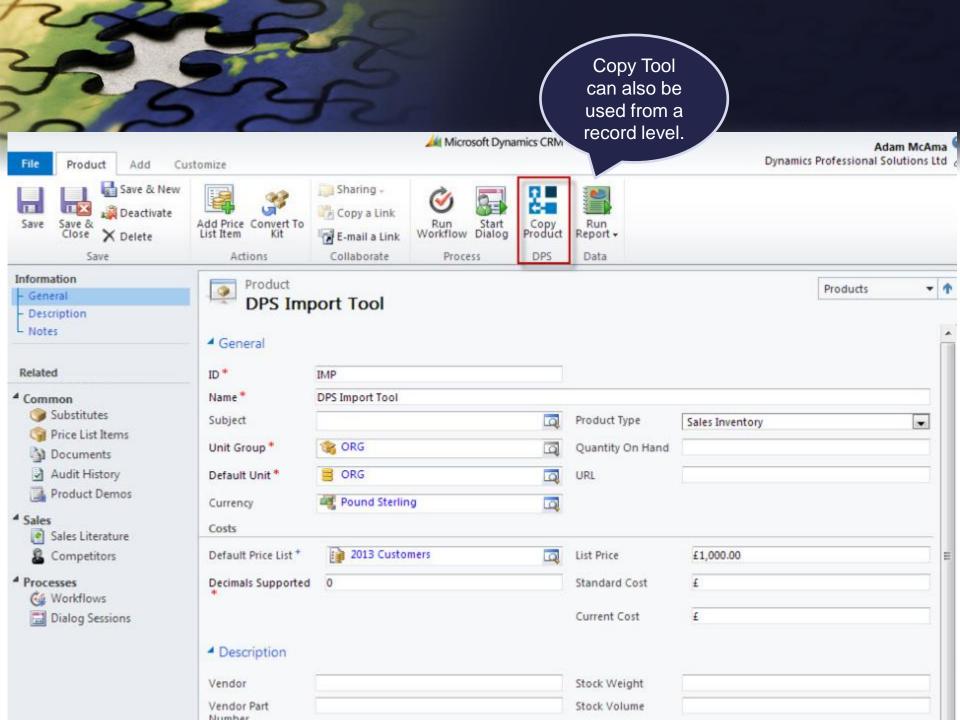
Specify information you would like to be copied from the original invoice.

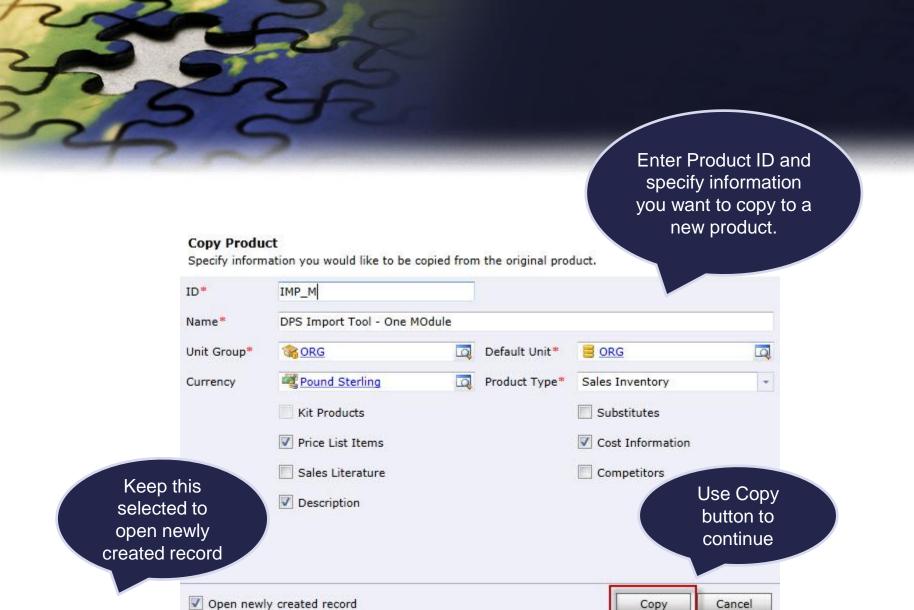




Copy Products







5.0.13049.5



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





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