



Copy Tool

for Microsoft Dynamics CRM 2011



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.

The screenshot displays the Microsoft Dynamics CRM interface. The top ribbon shows the 'Copy Opportunity' button highlighted with a red box. Below it, a table of 'Open Opportunities' is visible, with one record selected: 'Store is expanding - send new literature (sample)'. A 'Copy Opportunity' dialog box is open, allowing the user to specify information to be copied from the original opportunity to a new one. The dialog includes fields for 'Topic' (set to 'New Opportunity') and 'Potential Customer' (set to 'Fourth Coffee'). It also has checkboxes for 'Est. Revenue', 'Existing Products', 'Competitors', 'Notes', and 'Write-In Products'. The 'Open newly created record' checkbox is checked, and the 'Copy' button is highlighted with a red box.

You can use Copy Tool to duplicate following records:

- Products
- Opportunities
- Quotes
- Orders
- Invoices