



Copy Tool For Dynamics CRM 2013



Copy Tool

SALES Opportunities

My Open Opportunities

Topic	Est. Close Date	Es
Will be ordering about 110 items of all types (sample)	04/04/2014	
Very likely will order 18 Product SKU JJ202 this year (sam...	03/02/2014	
They sell many of the same items that we do - need to fol...	06/03/2014	
Needs to restock their supply of Product SKU AX305; will...	31/12/2013	
Needs to restock their supply of all Products	01/02/2012	
Needs to restock their supply of all Products	01/02/2012	
Needs to restock their supply of all Products	01/02/2012	
6 orders of Product SKU JJ202 (sample)	03/11/2013	

Copy Opportunity

Needs to restock their supply of Product SKU AX305; will purchase at le

Est. Close Date: 31/12/2013 | Est. Revenue: £25,000.00 | Status: In Progress | Owner: Adam McAm...

Qualify | Develop (Active) | Propose

Customer Need: Diversify into selling rela... | Identify Competitors: mark complete

Proposed Solution: Sell SKU AX305.

Identify Stakeholders: completed

Summary

Topic: Needs to restock their su... | Contact: Sidney Higa (sample) | Account: Blue Yonder Airlines (sam... | Purchase Timeframe: This Quarter | Currency: Pound Sterling | Budget Amount: £ 16000 | Purchase Process: Committee | Description: --

Copy Opportunity

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

Topic: Sales Opportunit 1

Potential Customer: Fourth Coffee (sample) | Price List | Standard Customers Pri

Est. Revenue | Existing Products | Competitors | Notes | Write-In Products

Open newly created record

Copy | Cancel

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

