



Copy Tool

For Dynamics CRM 2015



Copy Tool

SALES Opportunities

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 (sample)	Coho Winery (sample)
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 Airli...
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)

Copy Opportunity

Purchase Timeframe: Unknown

Identify Decision Maker: completed

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: --

Open

Copy Opportunity

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

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

Potential Customer: Litware, Inc. (sample) Price List: 2015 US Partners

Est. Revenue
 Existing Products
 Competitors
 Notes
 Write-In Products

Navigate to newly created record

Copy Cancel

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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:
 - ✓ Opportunities
 - ✓ Quotes
 - ✓ Orders
 - ✓ Invoices

