



User Guide

Copy Tool

for Microsoft Dynamics CRM 2011

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What's in this manual

DPS 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.

This manual is divided into following chapters:

➤ ***Use Copy Tool to duplicate Products***

This section will describe in how to copy a Dynamics CRM product.

➤ ***Use Copy Tool to duplicate Opportunities***

This section will describe in how to copy a Dynamics CRM opportunity.

➤ ***Use Copy Tool to duplicate Quotes***

This section will describe in how to copy a Dynamics CRM quote.

➤ ***Use Copy Tool to duplicate Orders***

This section will describe in how to copy a Dynamics CRM order.

➤ ***Use Copy Tool to duplicate Invoices***

This section will describe in how to copy a Dynamics CRM invoice.

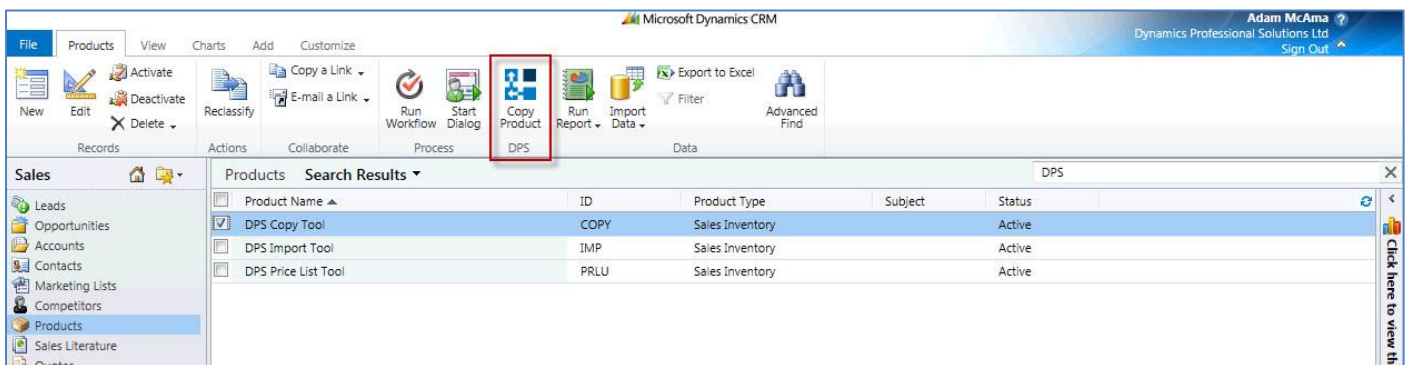
Functionality

This document will give you step by step instructions how you use Copy Tool.

Chapter 1: Use Copy Tool to duplicate Products

Follow below steps to duplicate a Product:

1. Open Dynamics CRM and select product you wish to copy. Copy Tool can also be used from a record level.
2. Select Copy Product command from Process section on your Ribbon.



3. "Copy Product" screen will open. Provide new Product ID and select what information from source record should be copied to a new one. Kit Products option will only be available if your source product is a Kit.

The 'Copy Product' dialog box is shown, with the following fields and options:

- ID*: [Empty text box]
- Name*: DPS Copy Tool
- Unit Group*: ORG
- Default Unit*: ORG
- Currency: Pound Sterling
- Product Type*: Sales Inventory
- Kit Products
- Substitutes
- Price List Items
- Cost Information
- Sales Literature
- Competitors
- Description

At the bottom, there is a checkbox for 'Open newly created record' (checked) and two buttons: 'Copy' (highlighted with a red box) and 'Cancel'.

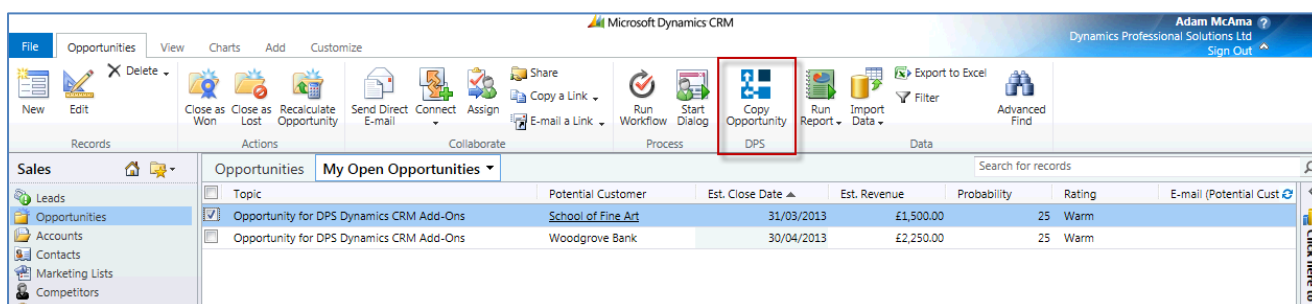
By default newly created record will open at the end of the copy process. Deselect "Open newly created record option" at the bottom of the Copy Product screen.

4. Press Copy button to finish copy process.

Chapter 2: Use Copy Tool to duplicate Opportunities

Follow below steps to duplicate an Opportunity:

1. Open Dynamics CRM and select opportunity you wish to copy. Copy Tool can also be used from a record level.
2. Select Copy Opportunity command from Process section on your Ribbon.



3. "Copy Opportunity" screen will open. Enter value in the Potential Customer field, amend opportunity Topic if required and select what information from source record should be copied to a new one.

The screenshot shows the 'Copy Opportunity' dialog box. The title is 'Copy Opportunity' and the subtitle is 'Specify information you would like to be copied from the original opportunity.' The dialog has several fields and checkboxes:

- Topic***: Opportunity for DPS Dynamics CRM Add-Ons
- Potential Customer***: [Empty field]
- Price List***: 2013 Customers
- Est. Revenue
- Existing Products
- Competitors
- Notes
- Write-In Products

At the bottom, there is a checkbox for 'Open newly created record' which is checked. To the right of this checkbox are two buttons: 'Copy' and 'Cancel'. The 'Copy' button is highlighted with a red box.

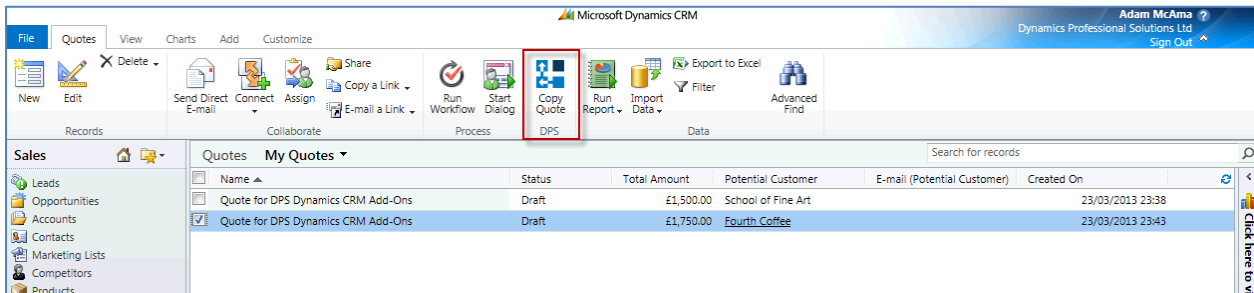
By default newly created record will open at the end of the copy process. Deselect "Open newly created record option" at the bottom of the Copy Opportunity screen.

4. Press Copy button to finish copy process.

Chapter 3: Use Copy Tool to duplicate Quotes

Follow below steps to duplicate a Quote:

1. Open Dynamics CRM and select quote you wish to copy. Copy Tool can also be used from a record level.
2. Select Copy Quote command from Process section on your Ribbon.



3. "Copy Quote" screen will open. Enter value in the Customer field, amend quote Name if required and select what information from source record should be copied to a new one.

The screenshot shows the 'Copy Quote' dialog box. The title is 'Copy Quote' and the subtitle is 'Specify information you would like to be copied from the original quote.' The dialog contains several fields and checkboxes:

- Name***: A text box containing 'Quote for DPS Dynamics CRM Add-Ons'.
- Customer***: A dropdown menu with a search icon, currently empty.
- Price List***: A dropdown menu with a search icon, currently showing '2013 Customers'.
- Checkboxes for information to copy**:
 - Addresses
 - Totals
 - Existing Products
 - Other Contacts
 - Shipping
 - Notes
 - Write-In Products
- Open newly created record**: A checkbox that is checked.
- Buttons**: 'Copy' and 'Cancel' buttons. The 'Copy' button is highlighted with a red box.

At the bottom left, the version number '5.0.13085.1' is displayed.

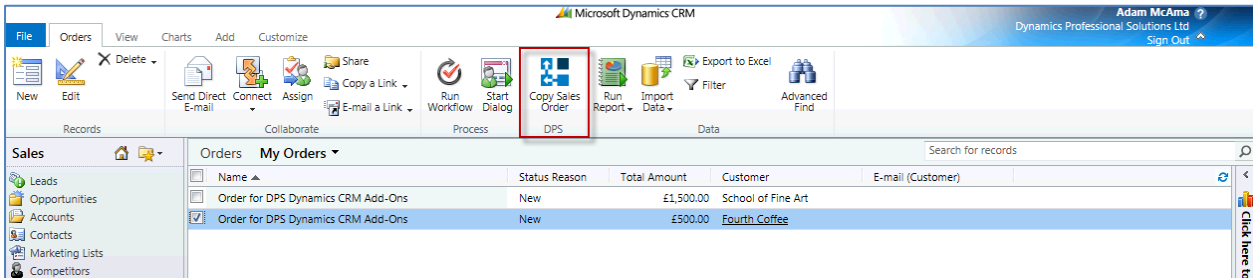
By default newly created record will open at the end of the copy process. Deselect "Open newly created record option" at the bottom of the Copy Quote screen.

4. Press Copy button to finish copy process.

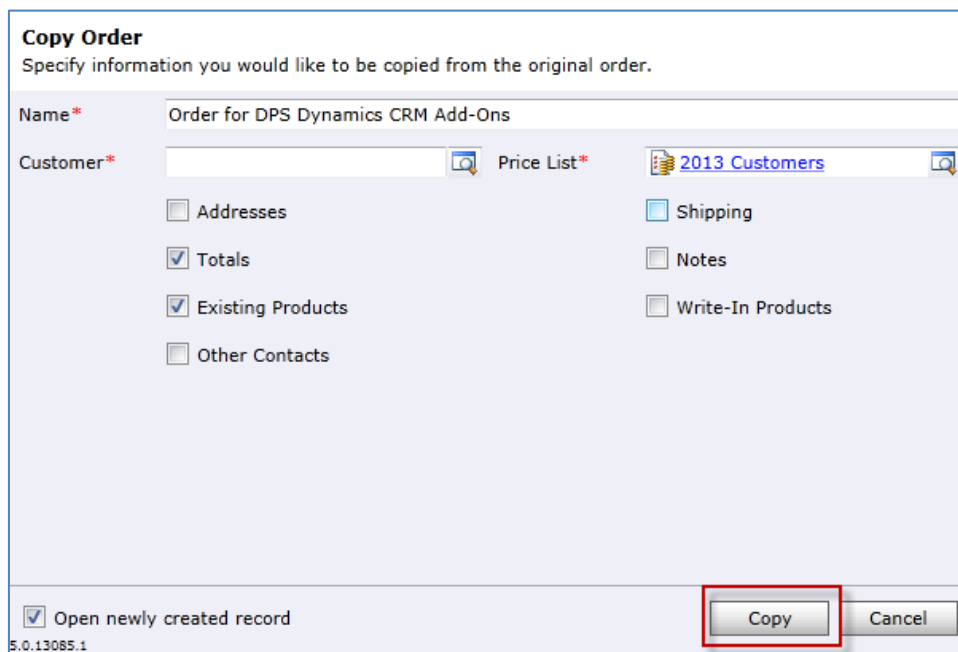
Chapter 4: Use Copy Tool to duplicate Orders

Follow below steps to duplicate an Order:

1. Open Dynamics CRM and select order you wish to copy. Copy Tool can also be used from a record level.
2. Select Copy Sales Order command from Process section on your Ribbon.



3. "Copy Order" screen will open. Enter value in the Customer field, amend order Name if required and select what information from source record should be copied to a new one.



The 'Copy Order' dialog box is shown. It contains the following fields and options:

- Name***: Order for DPS Dynamics CRM Add-Ons
- Customer***: [Empty field]
- Price List***: 2013 Customers
- Addresses
- Totals
- Existing Products
- Other Contacts
- Shipping
- Notes
- Write-In Products

At the bottom, there is a checkbox for 'Open newly created record' which is checked. The 'Copy' button is highlighted with a red box.

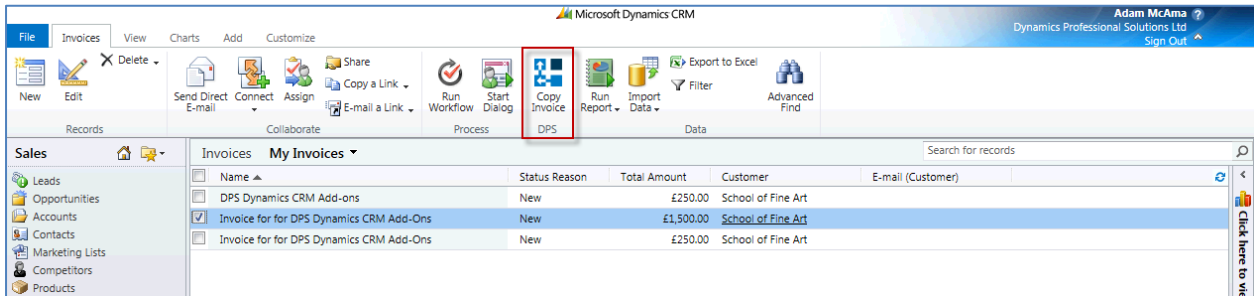
By default newly created record will open at the end of the copy process. Deselect "Open newly created record option" at the bottom of the Copy Order screen.

4. Press Copy button to finish copy process.

Chapter 5: Use Copy Tool to duplicate Invoices

Follow below steps to duplicate an Invoice:

1. Open Dynamics CRM and select invoice you wish to copy. Copy Tool can also be used from a record level.
2. Select Copy Invoice command from Process section on your Ribbon.



3. "Copy Invoice" screen will open. Enter value in the Customer field, amend invoice Name if required and select what information from source record should be copied to a new one.

The 'Copy Invoice' dialog box is shown. It contains the following fields and options:

- Name***: Invoice for for DPS Dynamics CRM Add-Ons
- Customer***: [Empty field]
- Price List***: 2013 Customers
- Addresses
- Totals
- Existing Products
- Other Contacts
- Shipping
- Notes
- Write-In Products

At the bottom, there is a checkbox for Open newly created record and two buttons: **Copy** (highlighted with a red box) and **Cancel**.

By default newly created record will open at the end of the copy process. Deselect "Open newly created record option" at the bottom of the Copy Invoice screen.

4. Press Copy button to finish copy process.

Support

If you have any questions or problem with our products contact our support team. Submit your question using New Support Request Form on our Web page. A member of our support team will get in touch with you as soon as possible.

<http://support.dynamics-pros.com>



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