Copy Tool

For Dynamics CRM 2013

User Guide

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Table Of Contents

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. Log in to Microsoft Dynamics CRM 2013

2. Open Dynamics CRM and select product you wish to copy. Copy Tool can also be used from a record level.
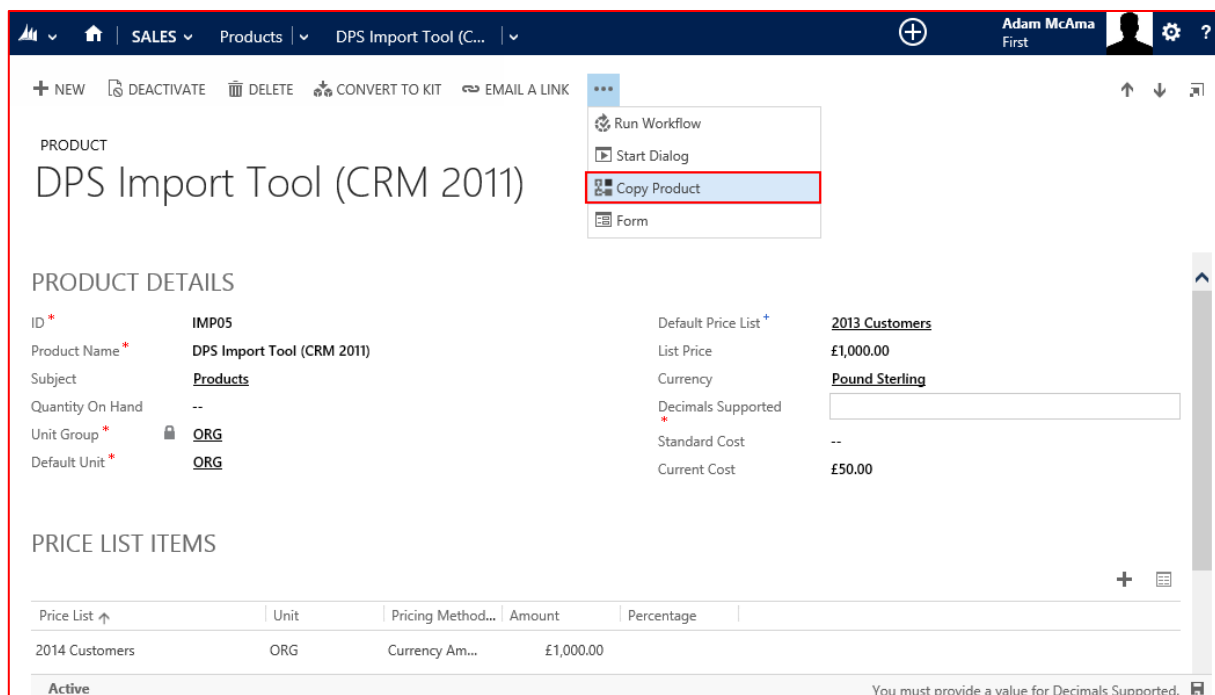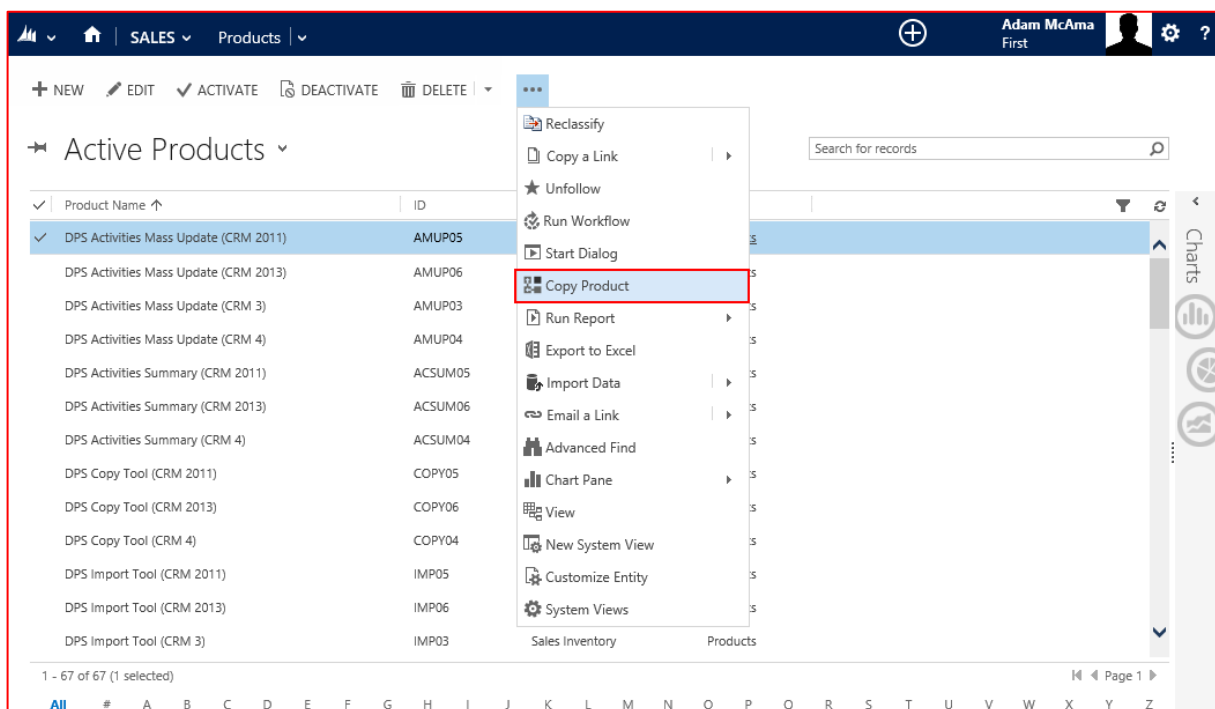
3. Select Copy Product command from Command Bar.

4. "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.
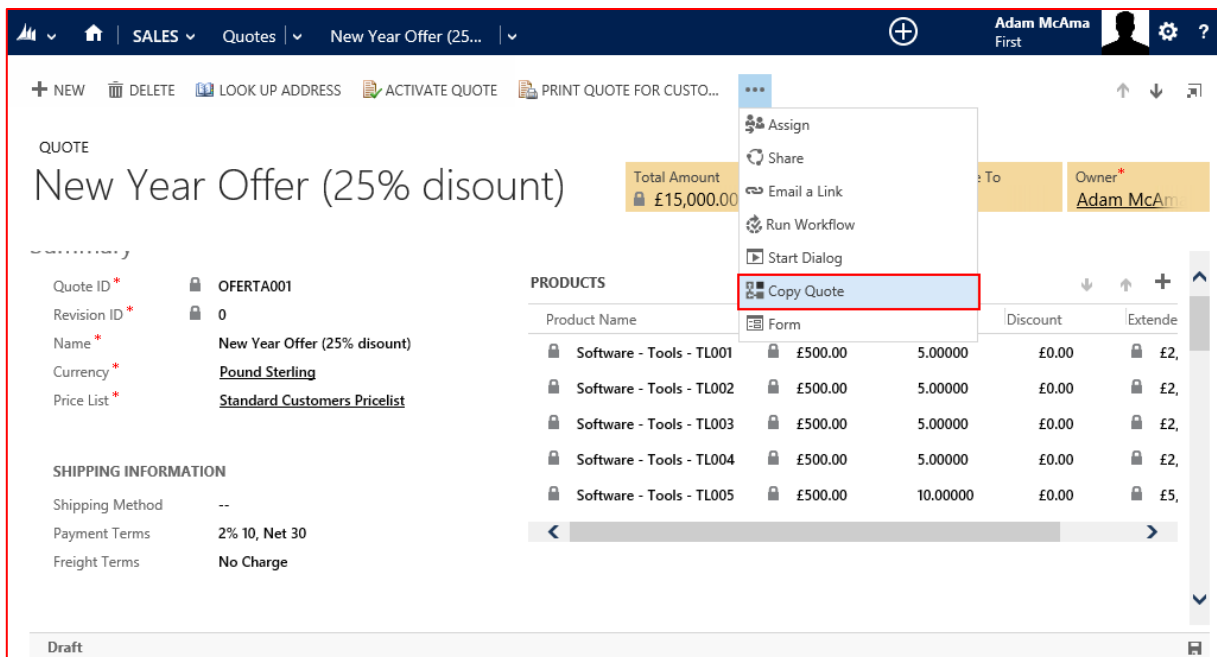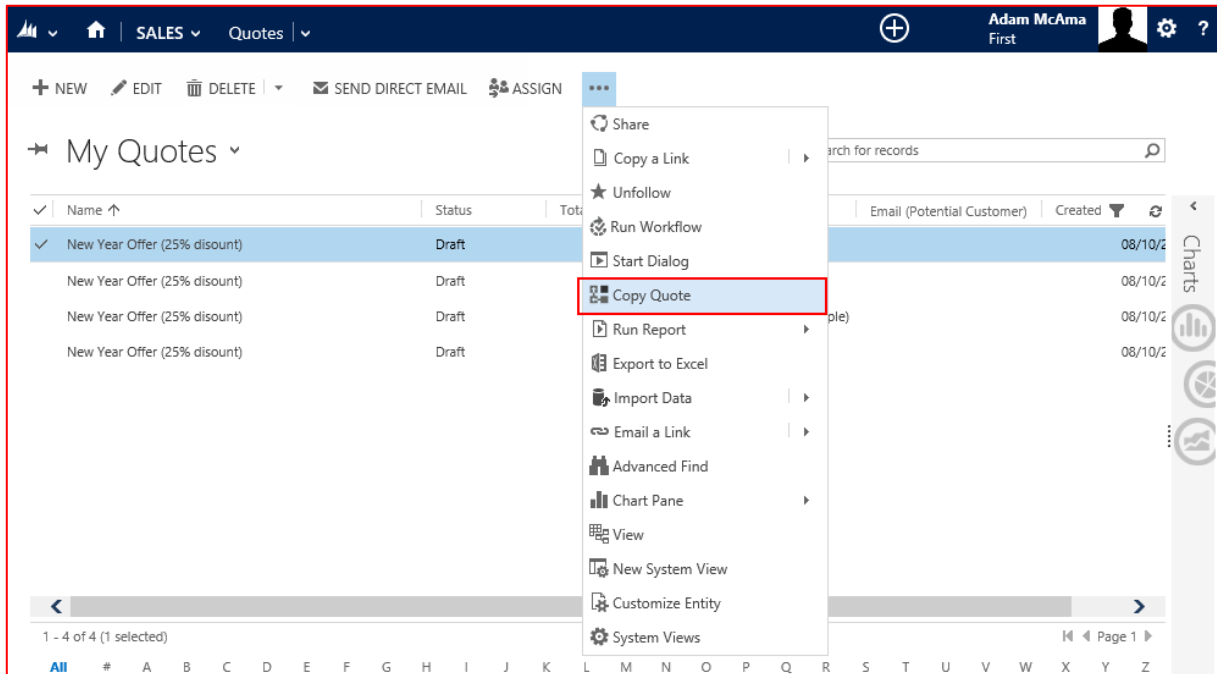

By default newly created record will open at the end of the copy process. Deselect "Open newly created record option" at the bottom of the Copy Product screen.

5. Press Copy button to finish copy process.

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.
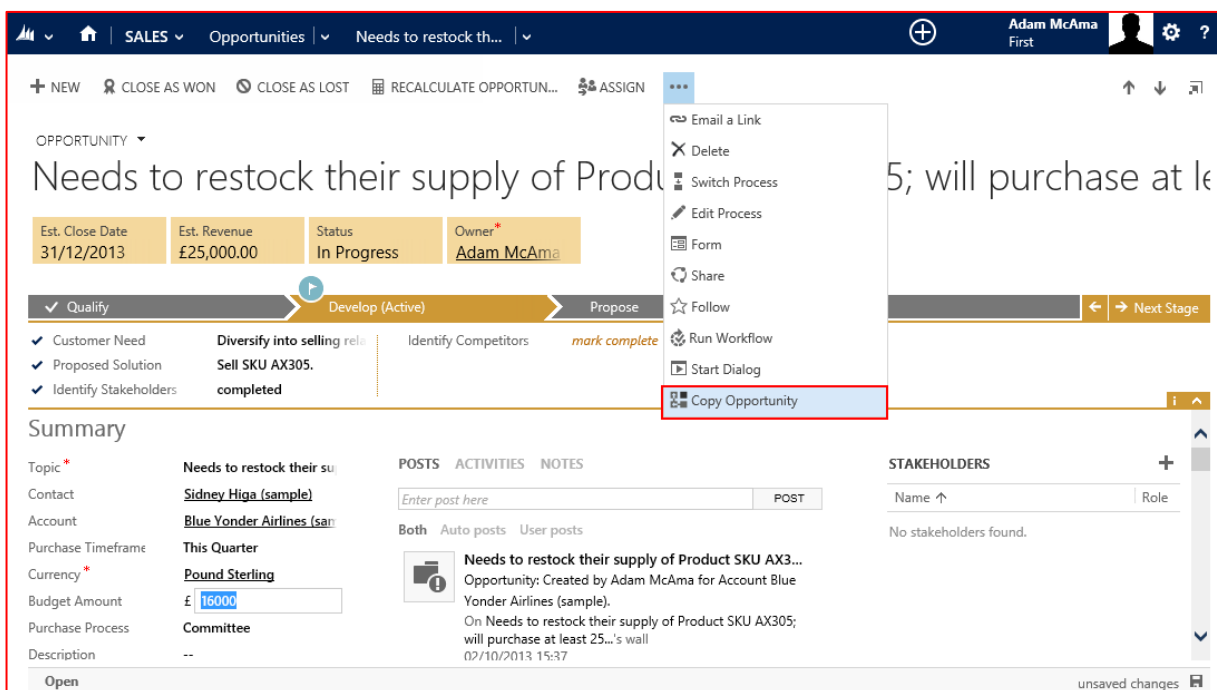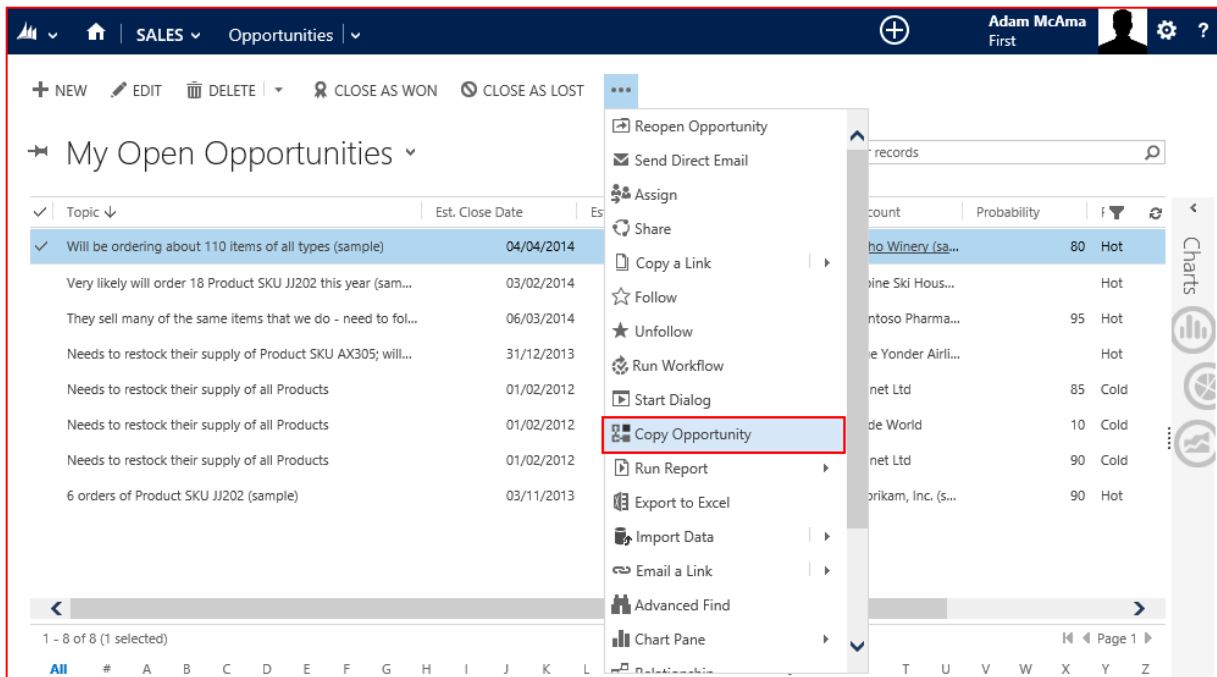
2. Select Copy Opportunity command from Command Bar.

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.
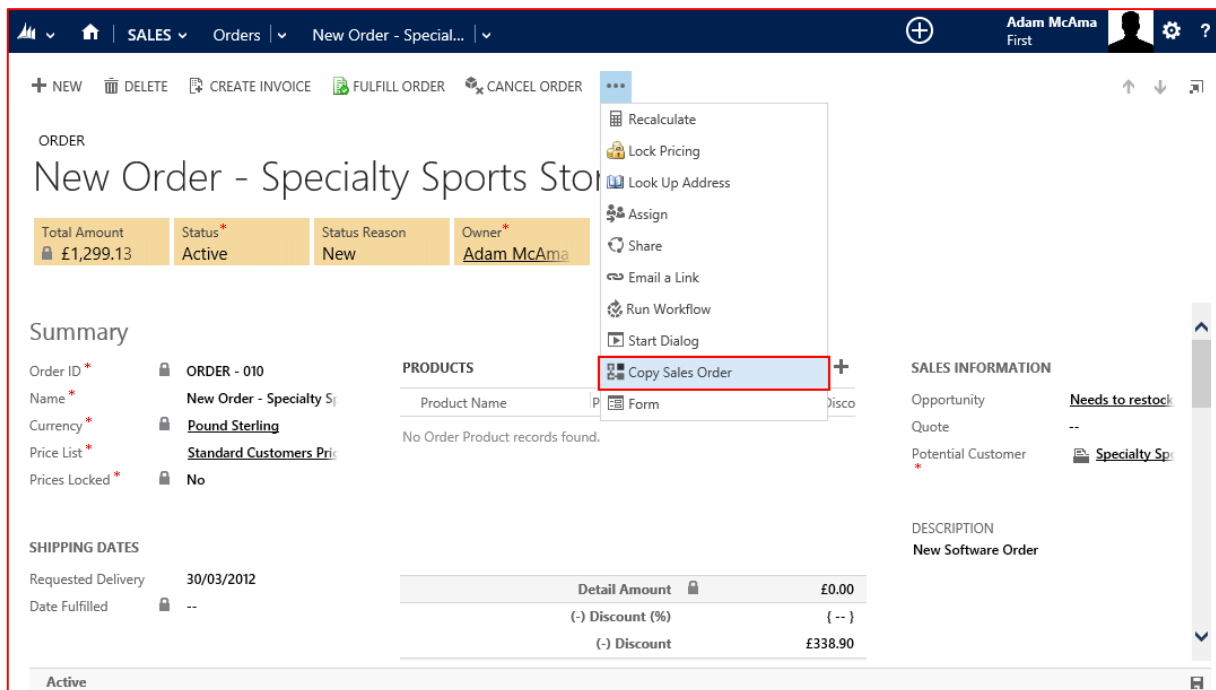

By default newly created record will open at the end of the copy process. Deselect "Open newly created record option" at the bottom of the Copy Opportunity screen.

4. Press Copy button to finish copy process.

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 Command Bar.

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.

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

Name*	New Year Offer (25% disount)		
Customer*	Blue Yonder Airlines (sample	Price List*	Standard Customers Pricelis
	☐ Addresses		☐ Shipping
	☑ Totals		☐ Notes
	☑ Existing Products		☐ Write-In Products
	☐ Other Contacts		

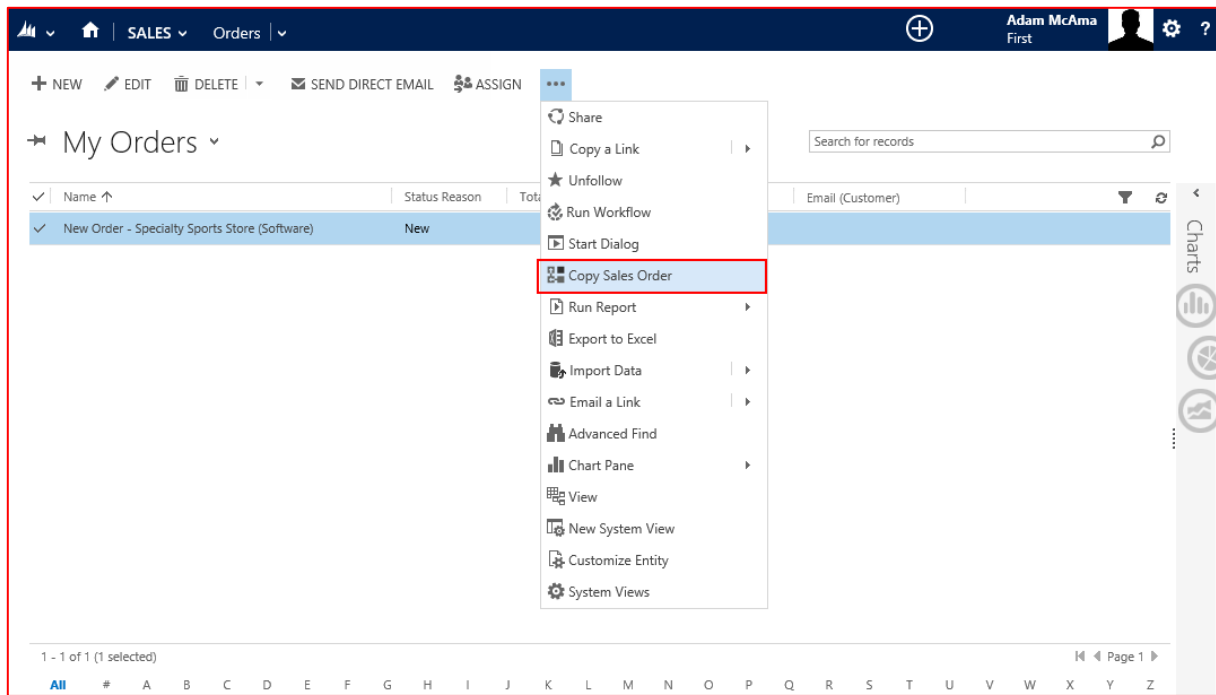☑ Open newly created record   Copy   Cancel
6.0.13276.1

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.

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 Command Bar.

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.
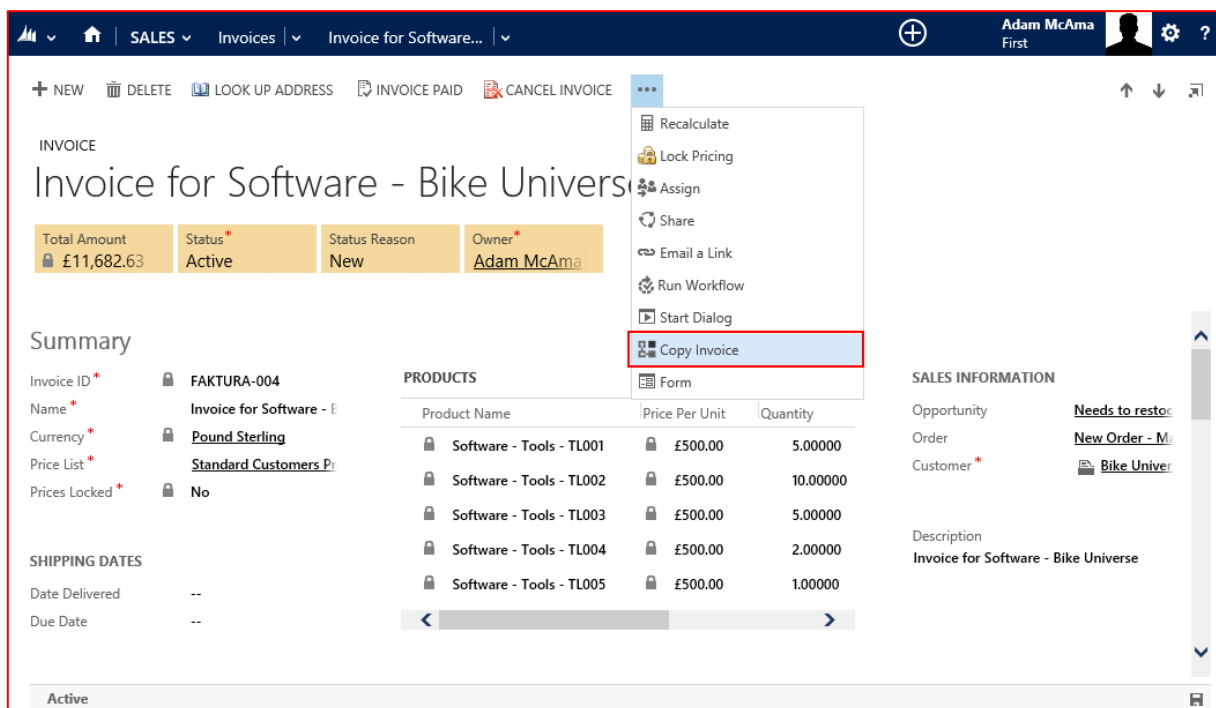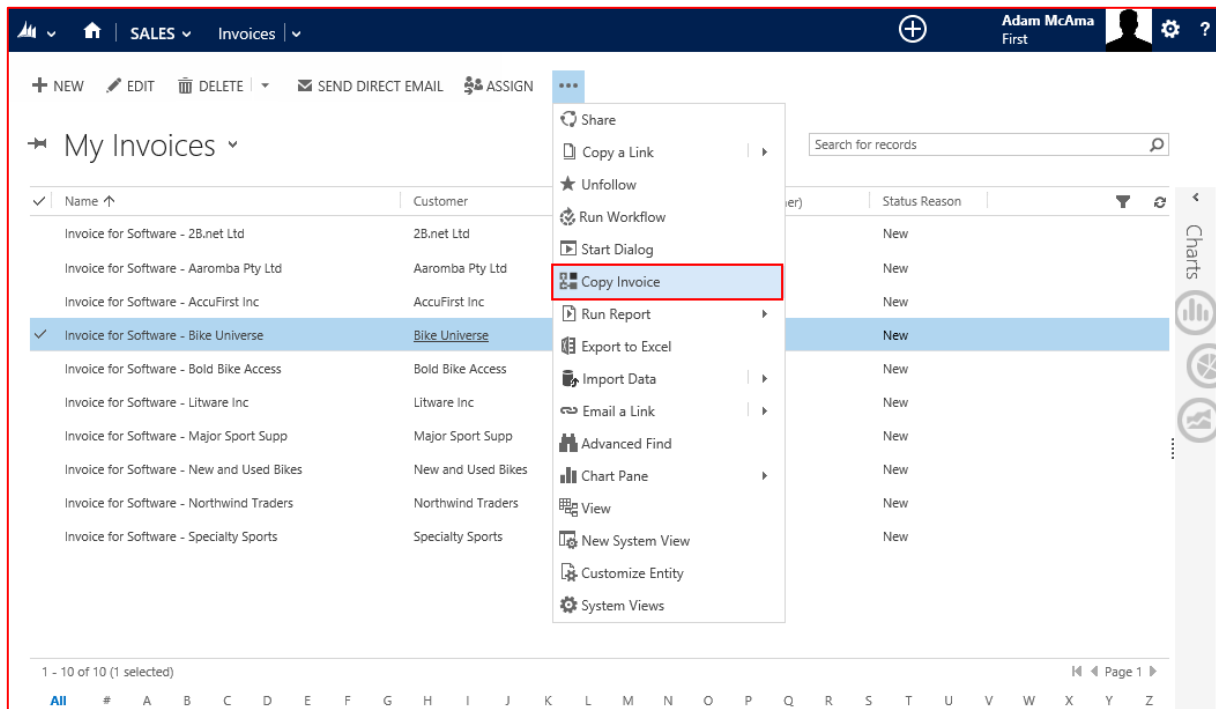

By default newly created record will open at the end of the copy process. Deselect "Open newly created record option" at the bottom of the Copy Order screen.

4. Press Copy button to finish copy process.

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 Command Bar.

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.

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.

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