



Microsoft Dynamics CRM / XRM Platform



User Guide



CRM Versions Supported: CRM 2015 and CRM Online

Copy Record Set is an add-on Product for Microsoft Dynamics CRM 2015 and CRM Online. Works on all Entities such as Opportunity, Quote, Order, Invoice, Lead, Accounts etc. Easy to operate and saves time to improve business quality. Works on all browsers.

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Product Overview

MTC is a visionary in the state-of-the-art delivery of latest technologies for Microsoft Dynamic CRM at the lowest possible costs to global markets of small to medium-sized business. Microsoft Dynamics CRM Copy Record Set is an add-on component developed by MTC to address the functional gaps existing in Microsoft Dynamics CRM and give a complete end-to-end solution to CRM business users easing the tiring process of creating quotes, orders and invoice reducing the probabilities of any error occurrence. Our copy quote solution aims at scaling high your business manager's customer handling capabilities, a vital need that helps you to stay competitively ahead, by addressing the current concerns involved in manual quote creation process. ROI is surely justified by faster and instant response to your customer thriving for a high success rate of winning a deal in this customer-driven age, with less time and effort utilization — a real-time possibility through our low-cost add-on product.

Key Benefits:

- Can reuse already existing Q.O.I for future prospects.
- Effortless process to create Q.O.I allows you save lot of time.
- It allows you to quickly publish, reuse and respond to your customer on time.
- Multiple new records can now be added without opening any new sub-windows or forms and edited without ever leaving the grid to substantially reduce data entry time.
- Data accuracy is improved by the ease of data correction thereby encouraging data error maintenance in all levels of the company which improves the company image.
- Data formatting quality and uniformity greatly enhanced by the ability to audit and edit on-the-fly so easily improves marketing efforts and CRM User appreciation.
- Fast deployment and easy integration with your CRM application.

Copy Record Set useful for

S.No	Entity Name	Description
1	Account	Copying Account, and its Notes and its Relationships
2	Case	Copying case and its Notes and its Activities
3	Contact	Copying Contact ,and its Notes and its Relationships
4	Invoice	Copying Invoice and its Products, and its Notes
5	Invoice Product	Copying only Invoice product
6	Lead	Copying Lead, and its Notes and its Relationships
7	Opportunity	Copying Opportunities and its Products, and its Notes
8	Opportunity Product	Copying only Opportunity Product
9	Order	Copying Order and its Products, and its Notes
10	Order Product	Copying only Order Product
11	Price List	Copying only Price list
12	Quote	Copying Quote and its Products, and its Notes
13	Quote Product	Copying only Quote Product

Installation Process

To install the Copy Record Set for CRM 2015 the following steps has to be followed

STEP 1:

- For free trial go to www.MTCCRM.com/CR.aspx click on Download Solution.

STEP 2:

- After the download completes, a new window will open asking you permission to save the file Click on Save.
It will save the file in location where you have specified to save.
- Extract the files from the folder where you saved. You will get two WINRAR ZIP files.
- Extract this Zip file to get



Mtc_CopyRecordSet_3_0_0_4_managed.zip



Licensing_1_0_3_0_managed.zip

STEP 3:

- To import the solution Open your CRM click on **SETTINGS→SOLUTION**

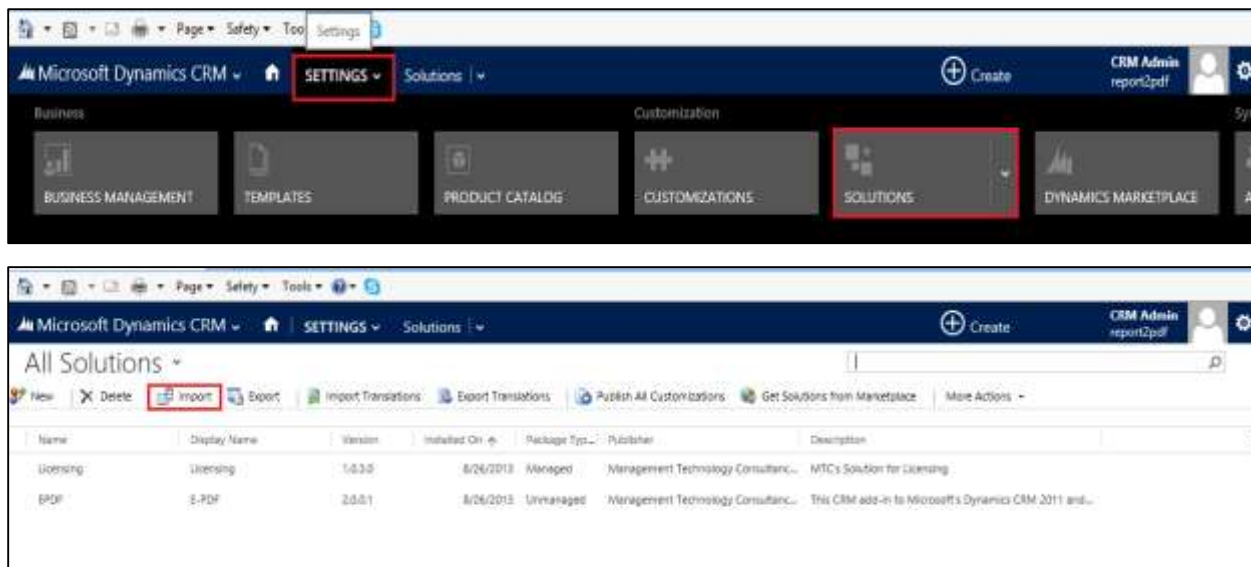


Figure 1: Import Solution

- In Import Solution Window you can browse and Select Solution Package zip file and then click on Next for further processing.
- First Install the Licensing Solution and later followed by Copy Record Set Solution

Installing Licensing Solution

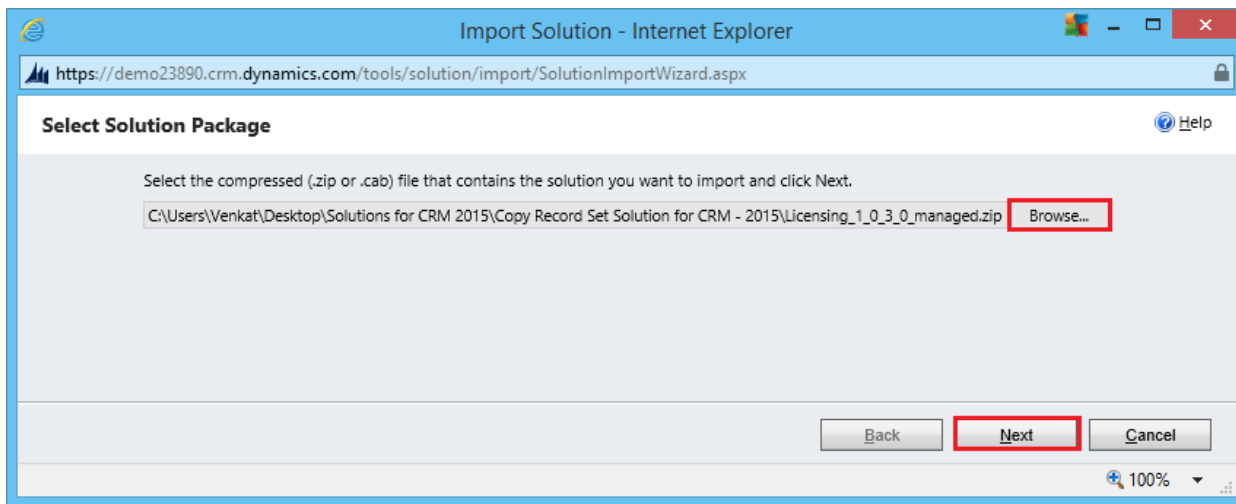


Figure 2 : Select Solution Package

- In Import Solution Window you can browse and Select Solution Package zip file and then click on Next for further processing.

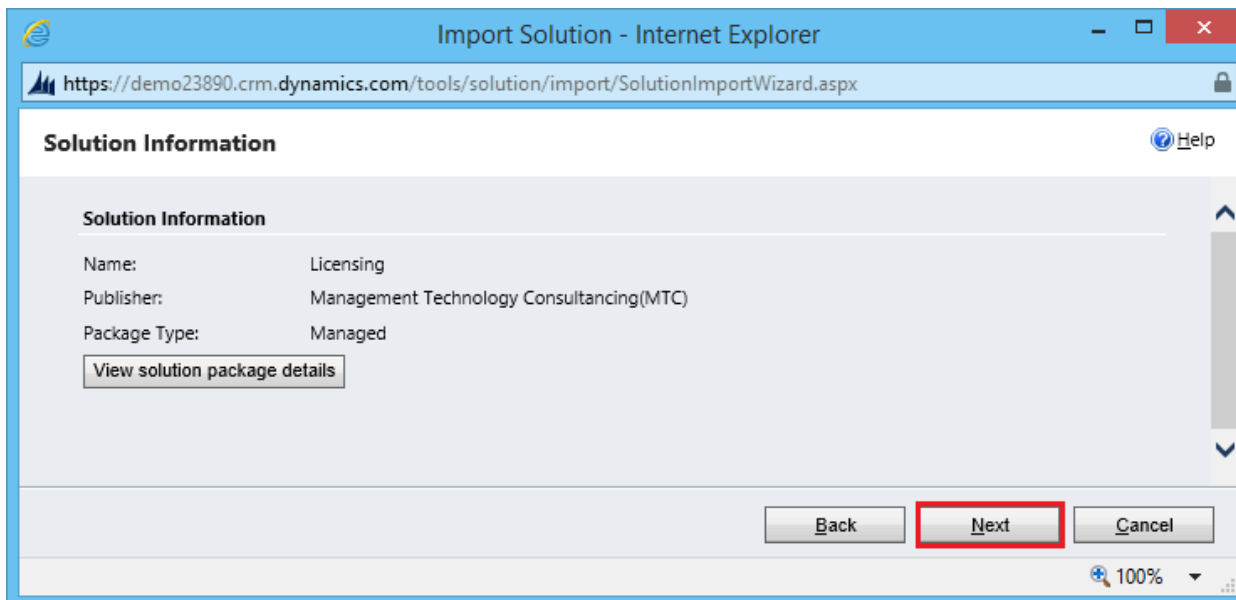


Figure 3: Importing Options window

- Click on Next to proceed

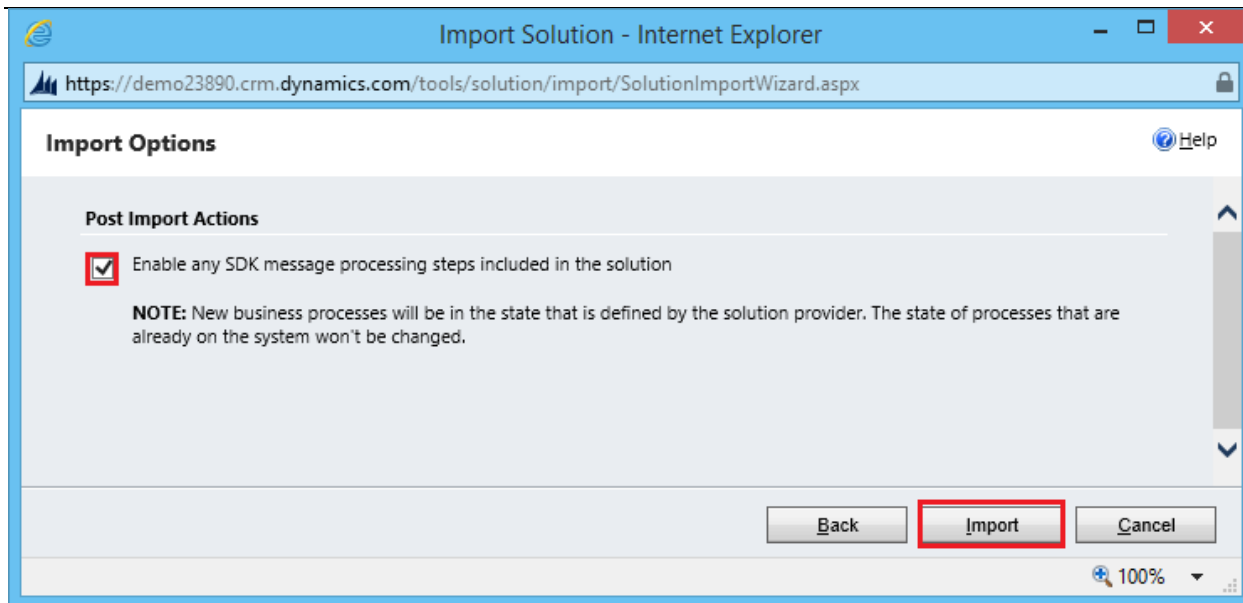


Figure 4: Import Option

- Click on Next to proceed

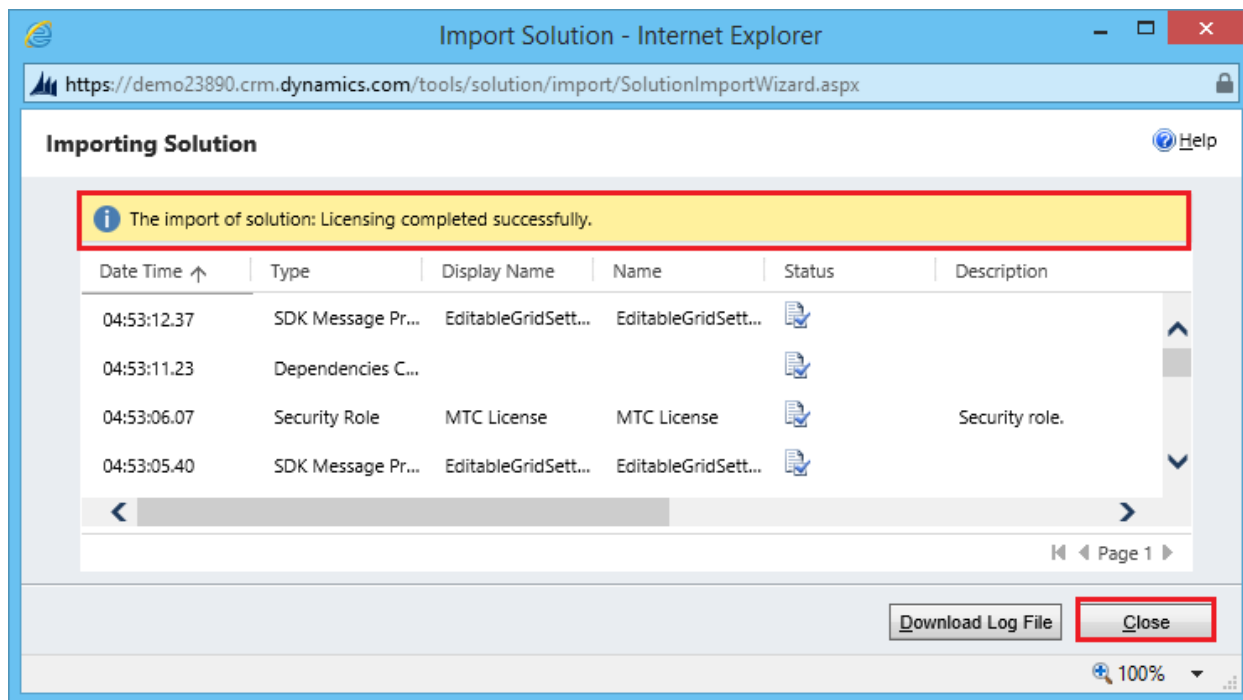


Figure 5: Importing Solution – Licensing

- Click on Close, on successful completion
- Message is displayed.

Installing Copy Record Set Solution

- After importing the Licensing solution, install the Copy Record Set Solution also.

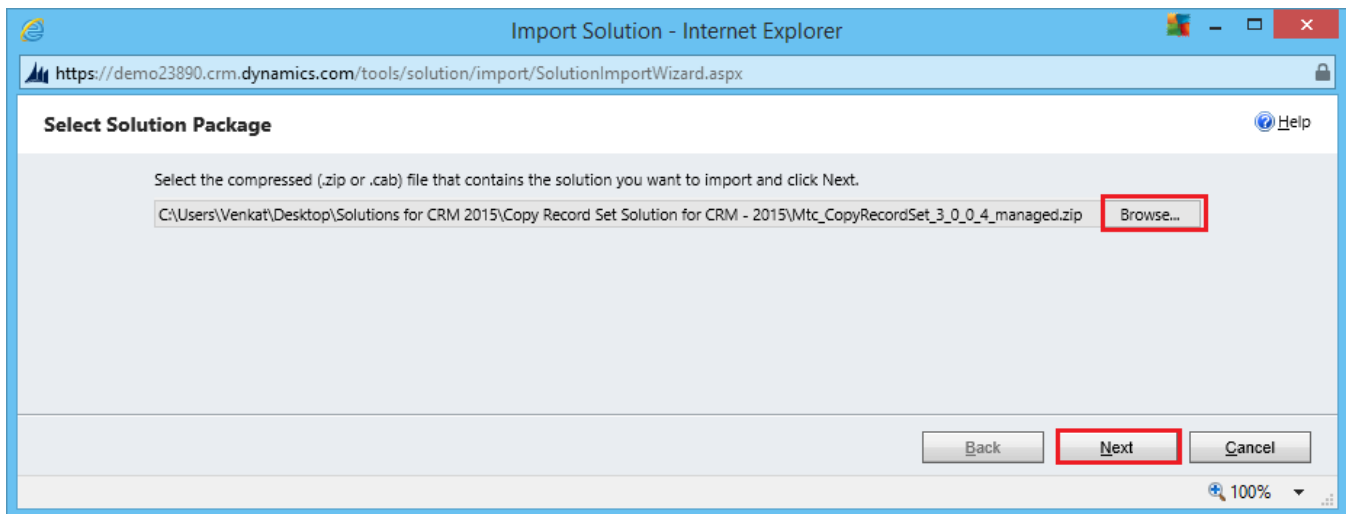


Figure 6: Select Solution Package

- Solution information window will open. It gives the solution package details and general information. Click on **Next** to continue.

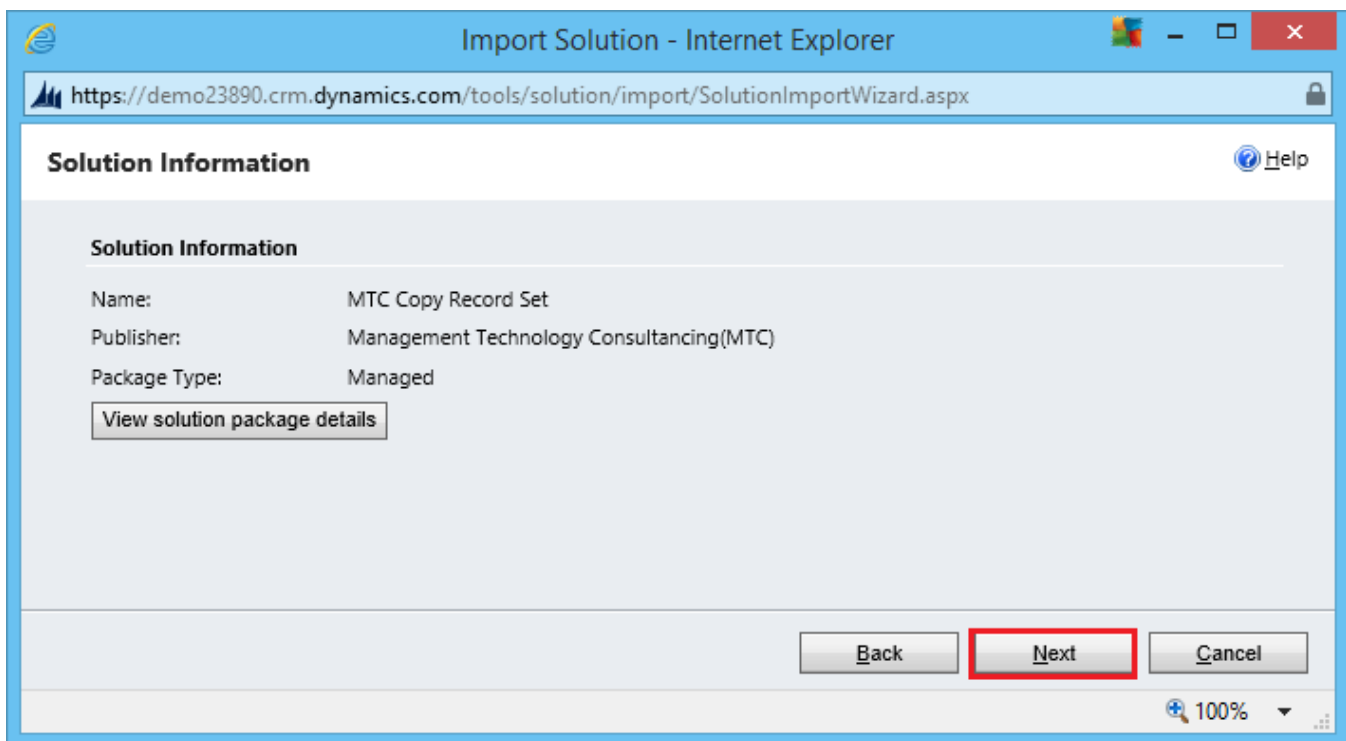


Figure 7: Solution Information

- Click on **Next** it will open importing solution window in that dialog will be opened displaying the message importing the customization please wait for the operation to complete.

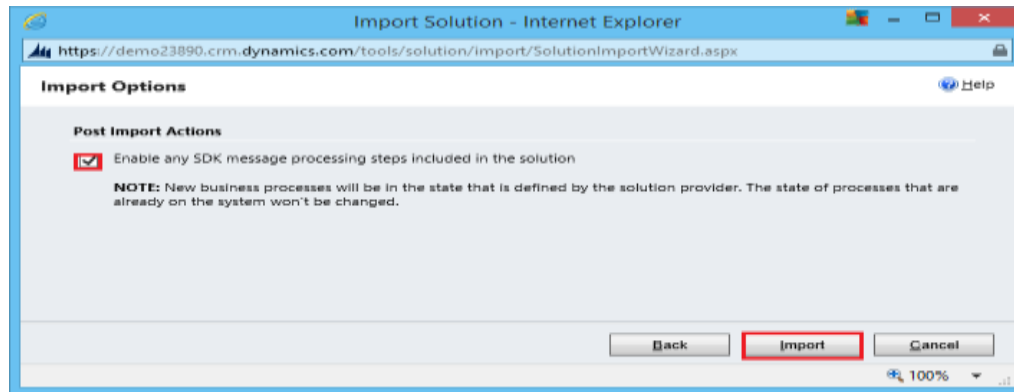


Figure 8: Import Option

- Click on **Import**, It will open importing solution window in that dialog will be opened displaying the message importing the customization please wait for the operation to complete.

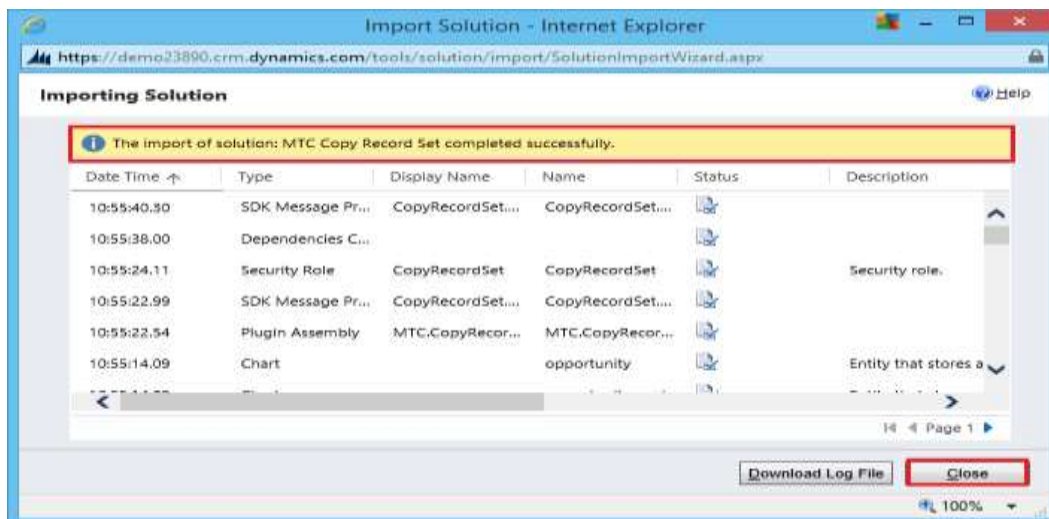


Figure 9: Import Solution Successfully

- Click on **Close** and refresh the CRM
- After importing the Copy Record Set Solution you need to place the License key navigate to **settings→solution→Click on Copy Record Set Solution**

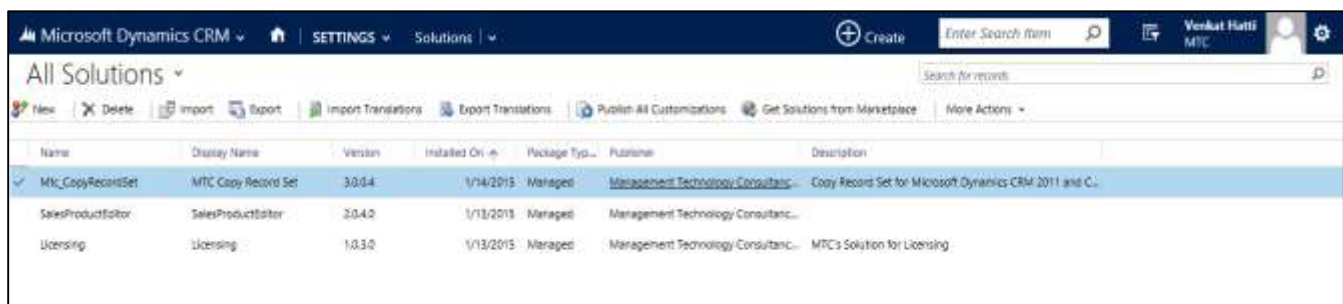


Figure 10: CRM showing both the Solutions

How to get License Key

- To install Copy Record Set for Microsoft Dynamics CRM you will require License Key, which you can get by sending an E-mail request to salesteam@mtccrm.com with your Organization Unique Name.
- To access your Organization Unique Name Click on **Settings**→**Customizations**→**Developer resources** as shown



Figure 11: Developer Resources

- A window will pop up with Organization Unique Name as shown

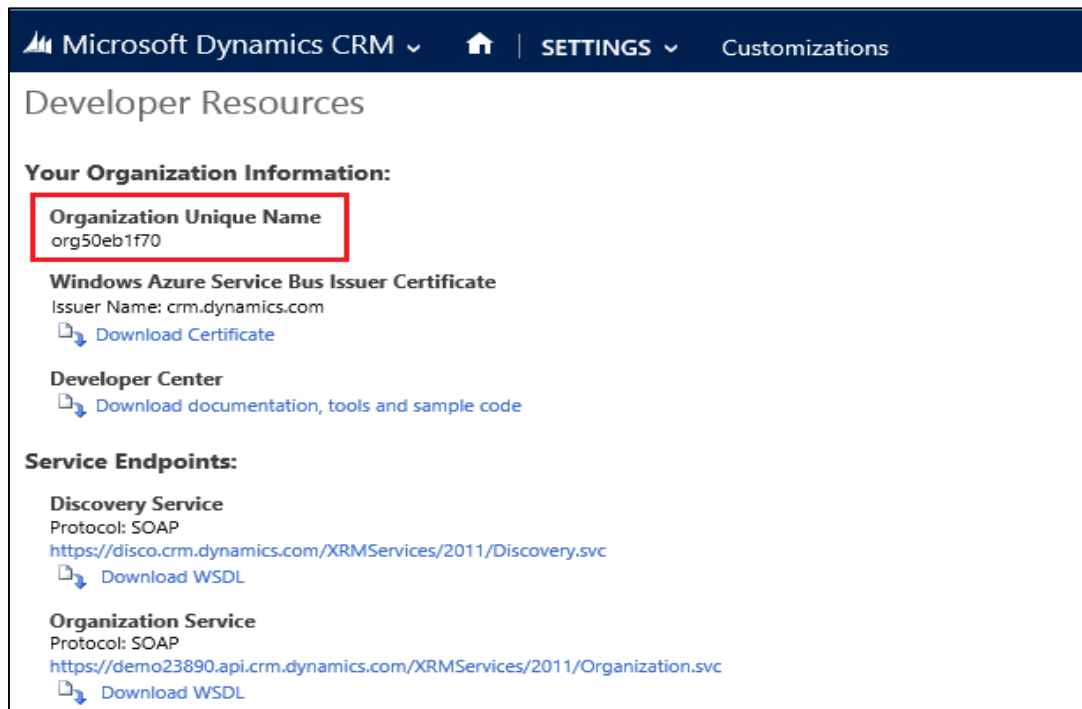


Figure 12: Organization Unique Name

- Send this Organization Unique Name through Email to salesteam@mtccrm.com and you will receive your Licensing Key within 24 hours.

NOTE: After placing the request, you will receive the LICENSE KEY within 24

Placing License Key

- To place license key go to **Settings**→**Solution**→Double Click on MTC Copy record Set solution, as shown

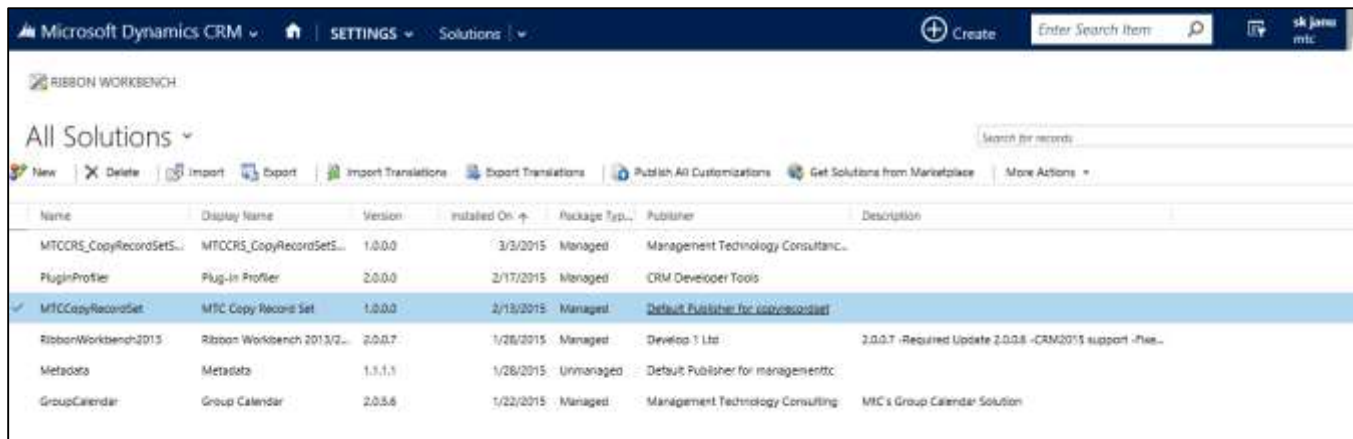


Figure 13: Solution Screen

- On Double Click , Opens a new window as shown

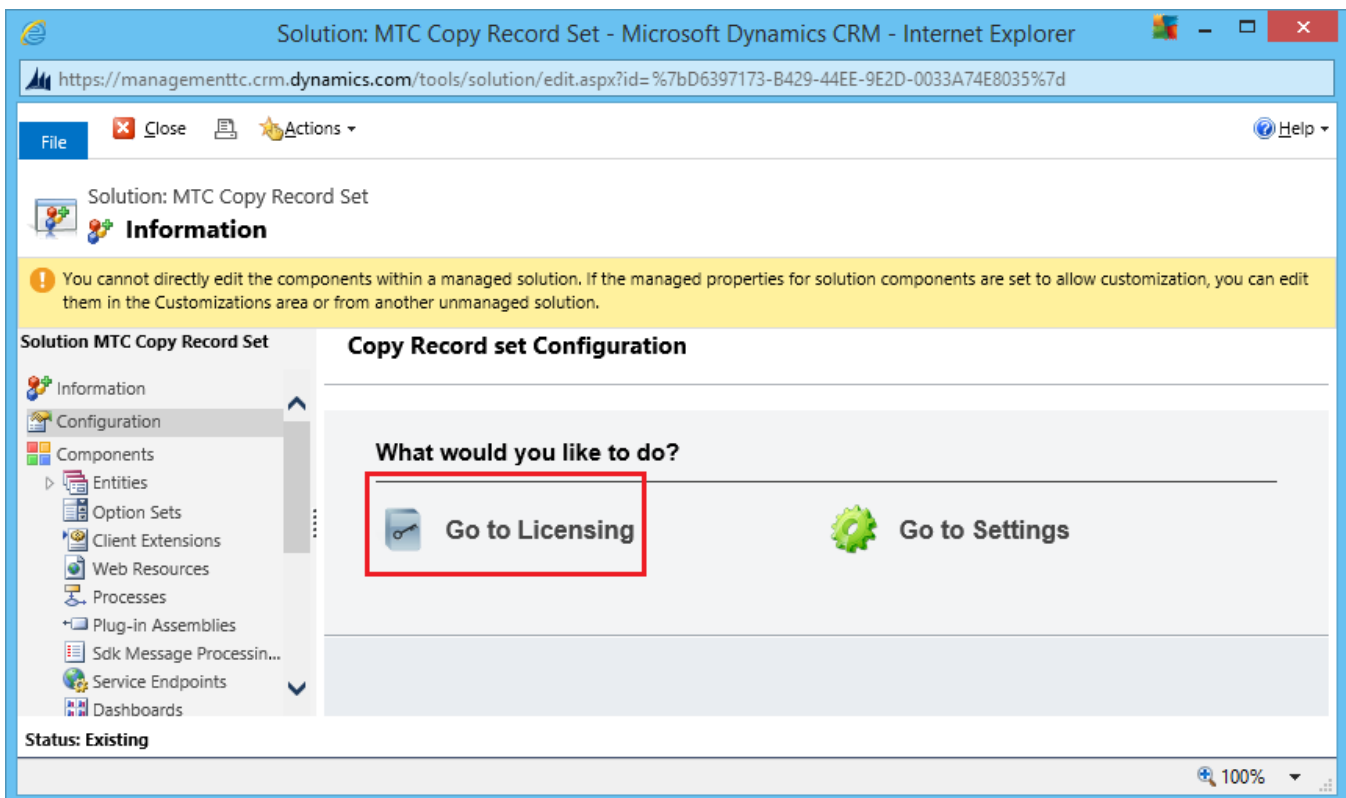


Figure 14: CRM Information Screen

Settings Area

- Go to Settings → Solution → Double Click on MTC Copy record Set solution to get Settings

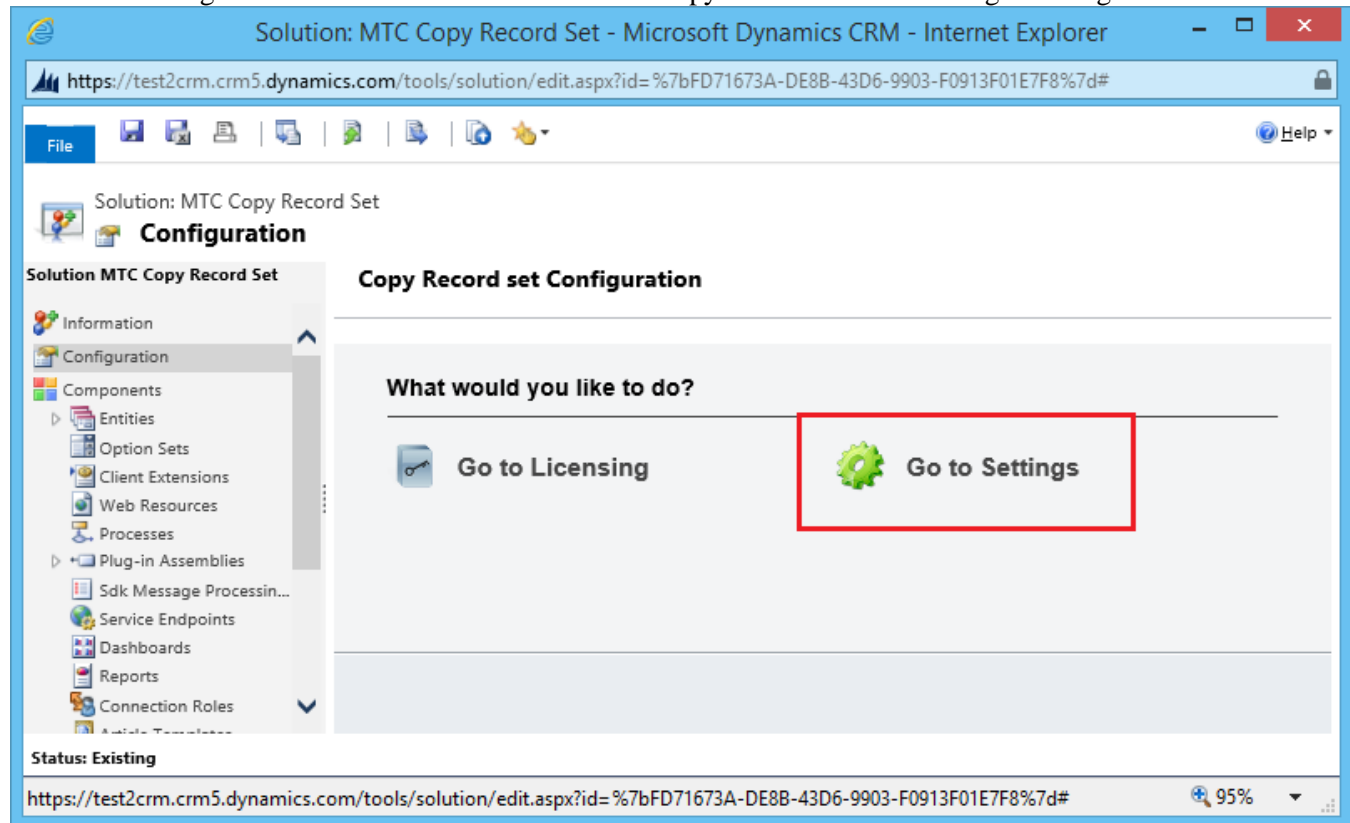
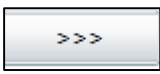
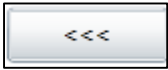
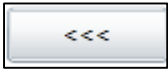


Figure 16: CRM Information Screen

- Select the Entity from the Entity list shown below by selecting the Check box
- Move all the entities to the right box showing the Entity Names
- Move the selected entity to right (Entity Name) by clicking on  or 
- Move the Entity from Right to Left Box by clicking on 
- Select the Entity you wish to have the Copy record set function as shown below (Example : Under Entity name we have selected Account)
- Now all the 1:N relationship with this account are listed in the 1:N Relationship Name Box
- From the list of all 1:N relationship name select the check box and move them to right side of the box as shown below for having the functionality

Copy Text Separator ☒ Copy Text Prefix

Select Entity

Entity Name

- ☐ activitypointer
- ☐ appointment
- ☐ asyncooperation
- ☐ campaign
- ☐ campaignactivity
- ☐ campaignresponse
- ☐ competitor

Entity Name

- ☒ account
- ☐ contact
- ☐ contract
- ☐ opportunity

Attributes

- ☒ Category
- ☒ Classification
- ☒ Account Number
- ☒ Owner
- ☒ Ownership
- ☐ Account Rating
- ☐ Address 1: ID

1-N Relationship Name

- ☐ Account_ActivityPointers
- ☐ Account_Appointments
- ☐ Account_AsyncOperations
- ☐ account_connections1
- ☐ account_connections2
- ☐ account_customer_opportunity_role
- ☐ account_customer_relationship_custi

1-N Relationship Name

- ☐ Account_Emails

Figure 17: Setting Area for Copy Record Set

- User can write any he wishes to add , followed by users choice of separator as shown above
- If the Check box is selected against Copy test prefix, than it is copies as prefix or else it is copied as suffix.
- After selecting all the Entities and their 1: N Relationships, Click on save button which is placed at the bottom of the page to save the settings.
- If the user like to reset any of the existing settings, he/she can click on Reset button provided to reset all settings.
- At any given time a click on Back button takes you back to the Information screen.
- Suppose user select Account (Entity Name) all related attribute are displayed in the Attribute display box
- If user selects the check box in the attribute box then only the existing attributes will be removed for mapping

Security Role Privileges

Security Roles are a standard function of Microsoft Dynamics CRM and Copy Record Set is compliant to the privileges controlled by Security Roles. Your User's access privileges to add or "Create" records and modify or "Write" records from Copy Record Set can be controlled by the Security Role functionality explained briefly here and in CRM guides and "Help".

Adding Security roles at User level

You can set user level Security Roles privileges, Navigate to **Settings** → **Security** → **Users** as shown below

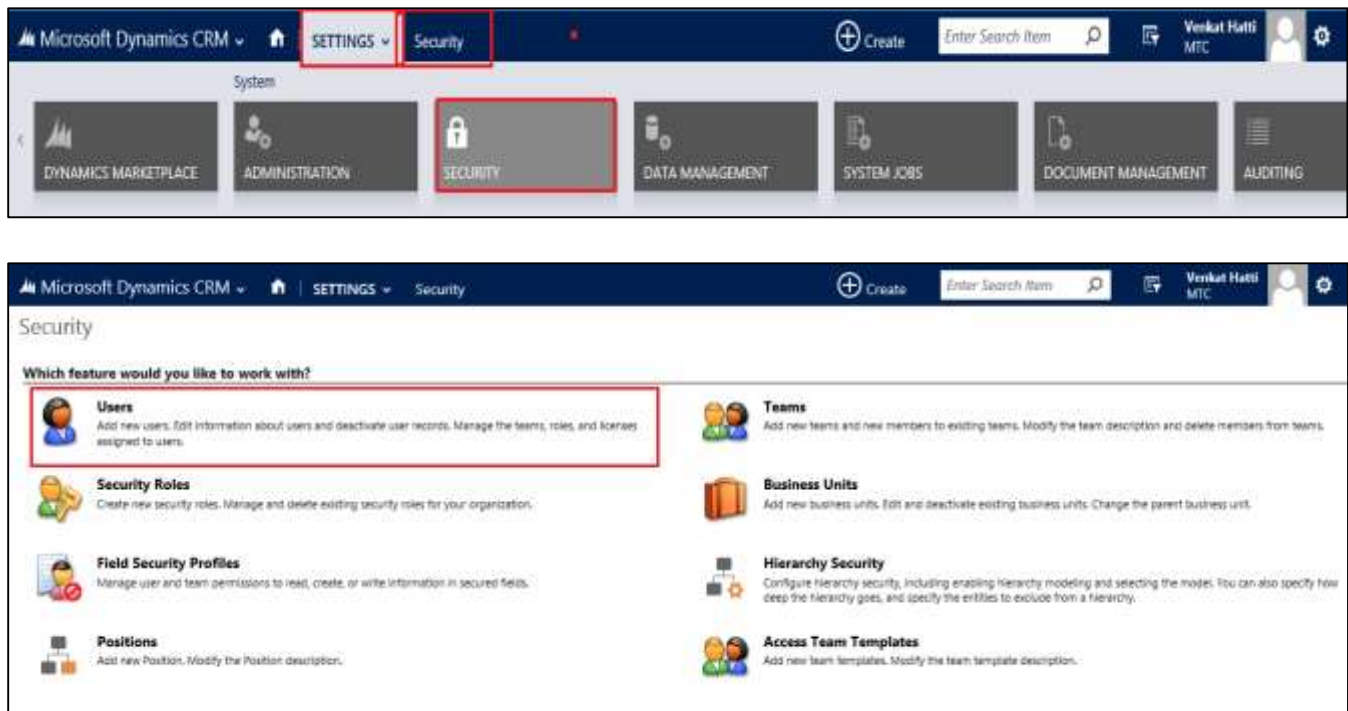


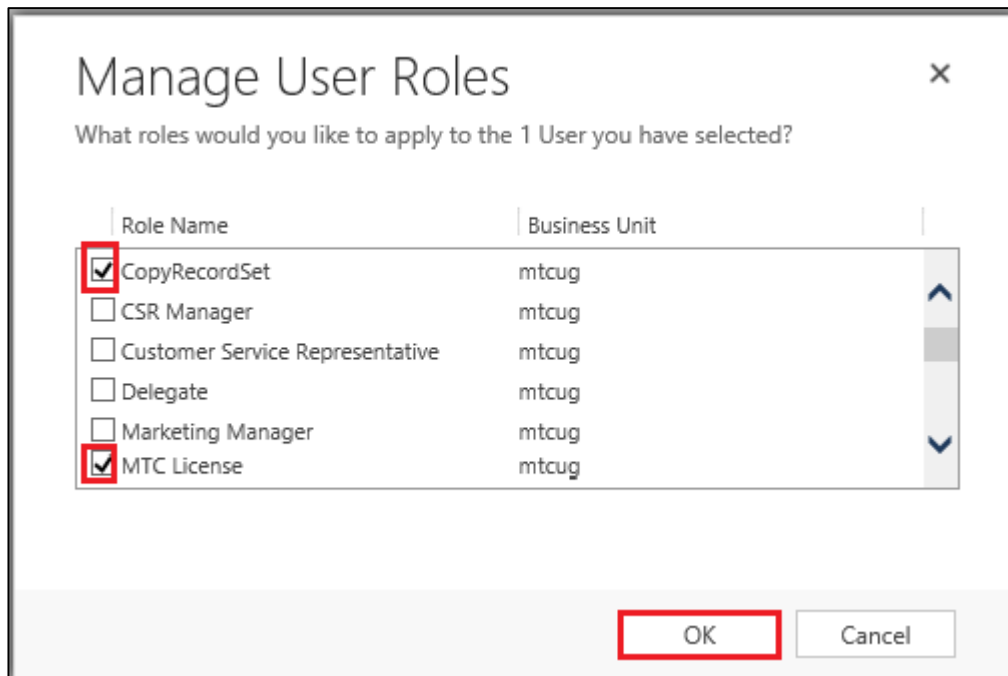
Figure 18 : User level Settings

- It opens a new window with a list of **Enabled Users** as shown
- Select the check box of user name to make a modification
- Click on **Manage Roles** on the ribbon
- To Create a new User click on New Icon on the top left corner and follow the procedure as it comes on screen



Figure 19 : Manage Roles

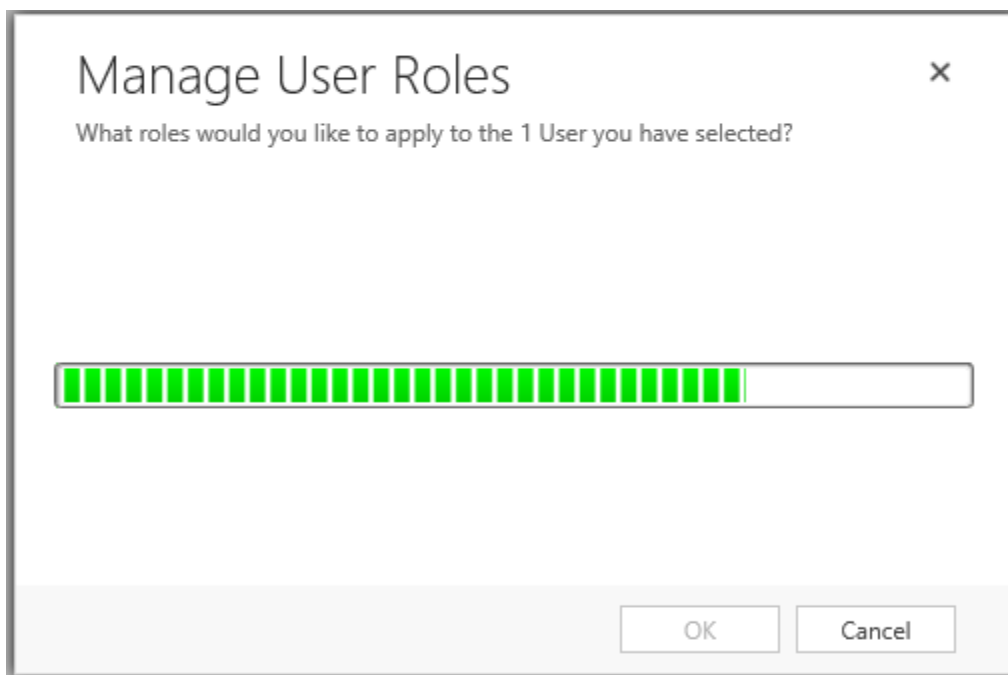
- A new window opens as shown.
- Select the role as “CopyRecordSet” and “MTC License” and click on “OK” to assign the role to the user.



The screenshot shows a 'Manage User Roles' dialog box with a close button (X) in the top right corner. Below the title bar, it asks 'What roles would you like to apply to the 1 User you have selected?'. There is a table with two columns: 'Role Name' and 'Business Unit'. The table contains six rows of roles, all with 'mtcug' as the Business Unit. The first and last rows are checked with a red square around the checkbox. At the bottom right, there are 'OK' and 'Cancel' buttons, with the 'OK' button highlighted by a red rectangle.

Role Name	Business Unit
<input checked="" type="checkbox"/> CopyRecordSet	mtcug
<input type="checkbox"/> CSR Manager	mtcug
<input type="checkbox"/> Customer Service Representative	mtcug
<input type="checkbox"/> Delegate	mtcug
<input type="checkbox"/> Marketing Manager	mtcug
<input checked="" type="checkbox"/> MTC License	mtcug

Figure 20 : Manage User Roles



This screenshot shows the same 'Manage User Roles' dialog box, but the table of roles is replaced by a progress bar consisting of 20 green vertical bars. The 'OK' and 'Cancel' buttons are still present at the bottom right.

Security Roles in detail for Other Users.

Navigate to **Settings** → **Security** → **Security Roles** as shown below

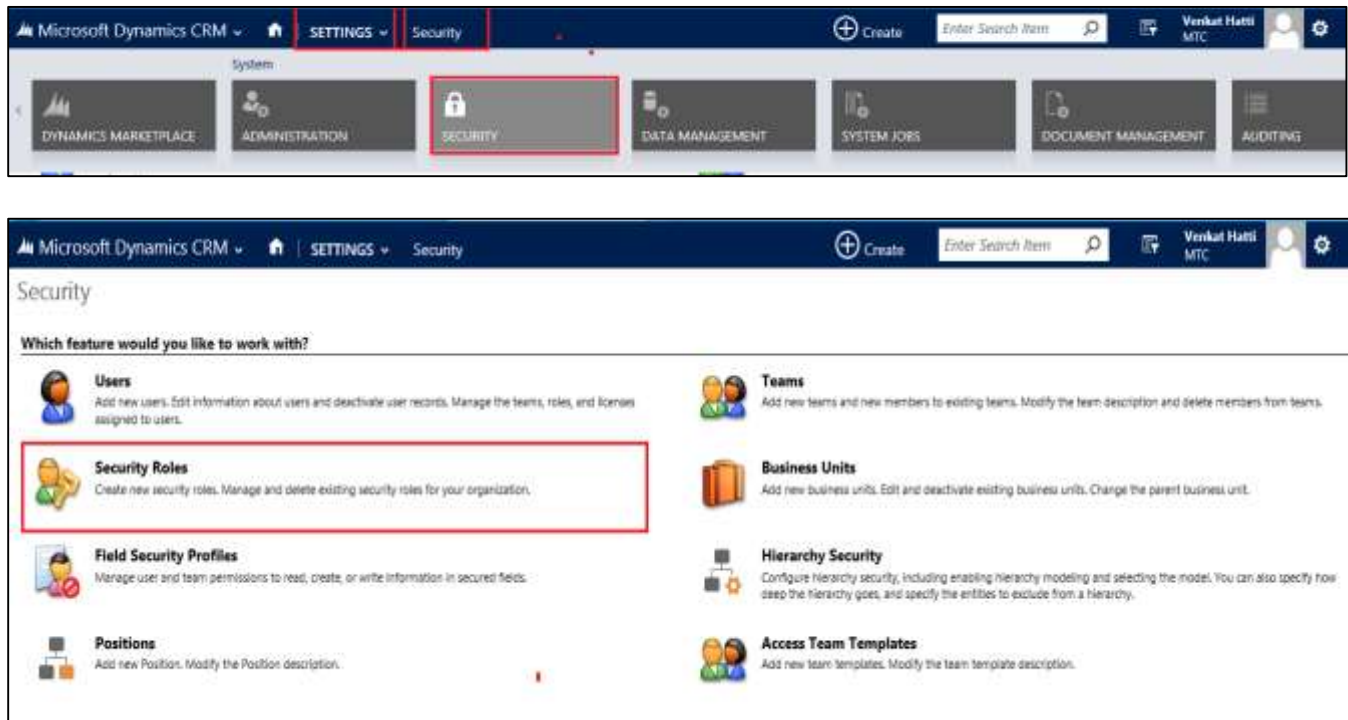


Figure 21: Security Roles Setting

- On click the CRM navigates to Security Roles Page., where in if you select **CopyRecordSet** as shown Below
- Click on **CopyRecordSet** and a new pop up screen opens up for **Security Role : CopyRecordSet**,
- Now click on Custom Entities tab to display the various option to select in from of a table

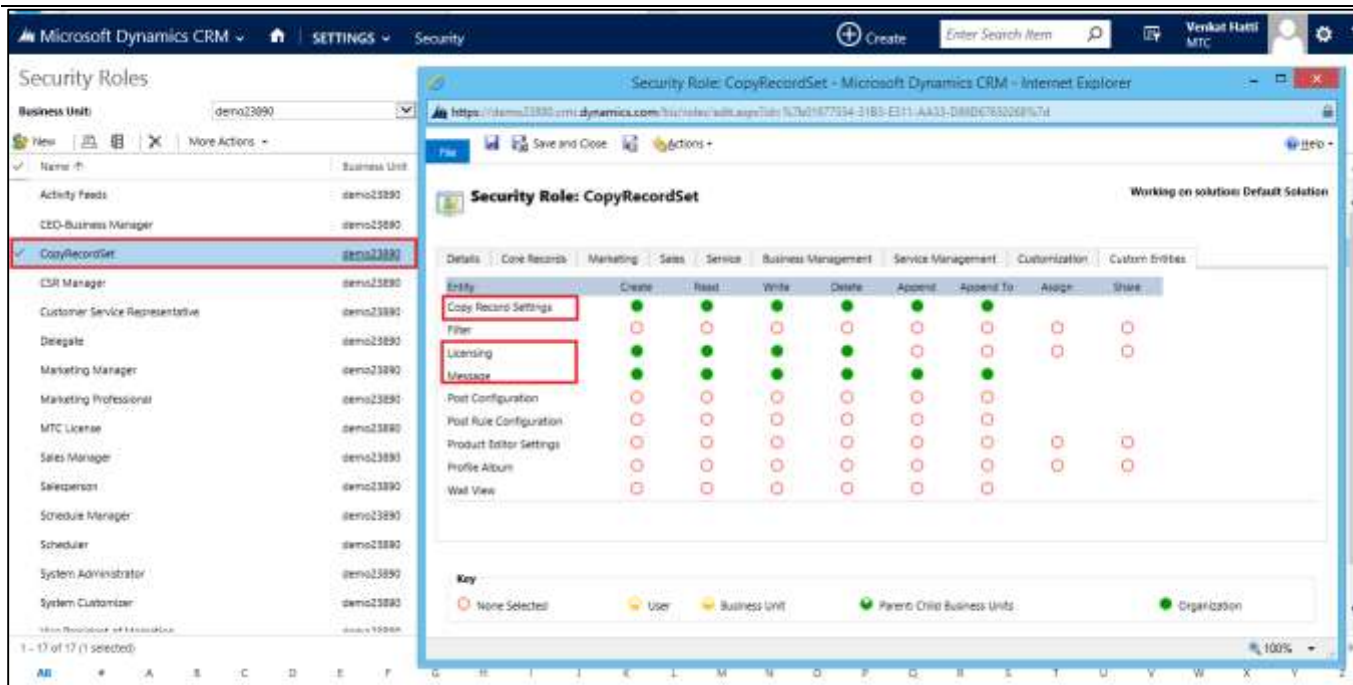


Figure 22: Security Role: in detail for user

- Here in this screen you can select and assign roles to every individual as per your organizational policies.
- On selecting the circle, it turns Green which indicated that the user has that privileges.
- On click of the Entity Name itself all the privileges for this entity like Create, Read, Write, and Delete etc. are enabled. Finally click on Save and Close tab which is placed on the top of the form.

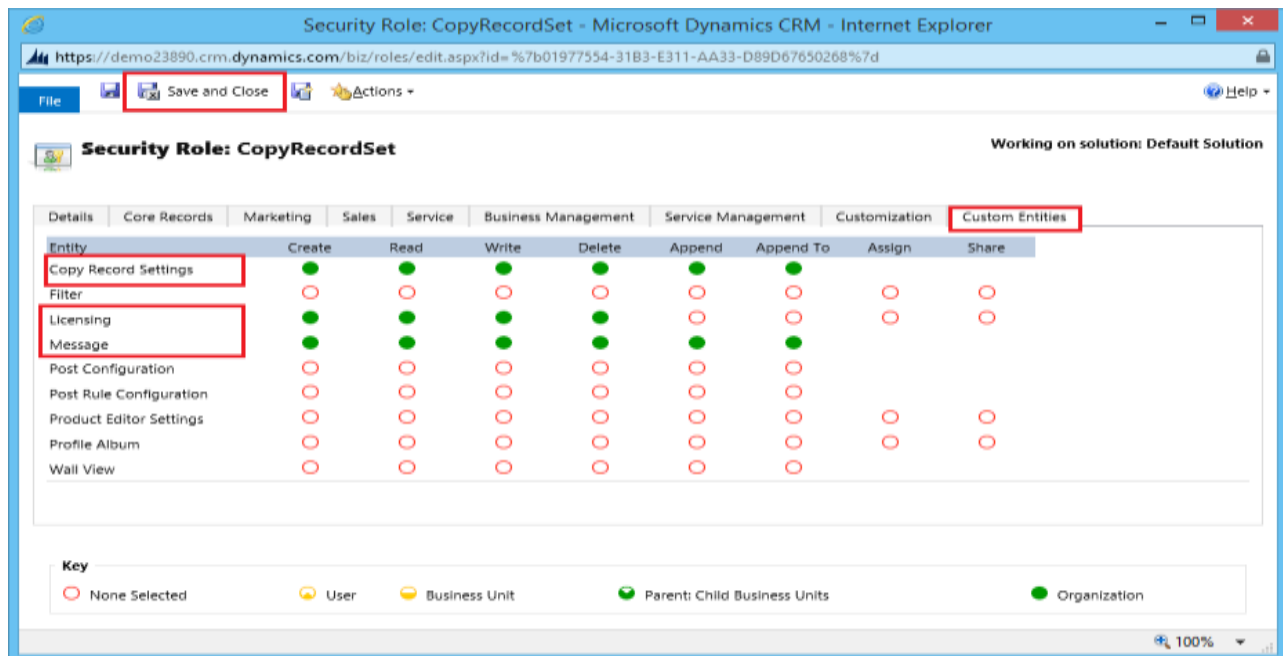


Figure 23: Security Role: Copy Record Set

Copy Record Set for Account, Lead and Contact only

Though the Copy Record Set product works for all entities, but relationships can be preset for only three entities like Account, Lead and Contact. The relationship may be **1: N** or **N: N**. unless these settings are made in the CRM your end result may not be as desired by you. Details of the Relationship links are shown below

Example

Here we will show you how does relationship works with Email task for an Account Entity

- Click on Advance Find button which is on the Top Ribbon to get a pop up screen.

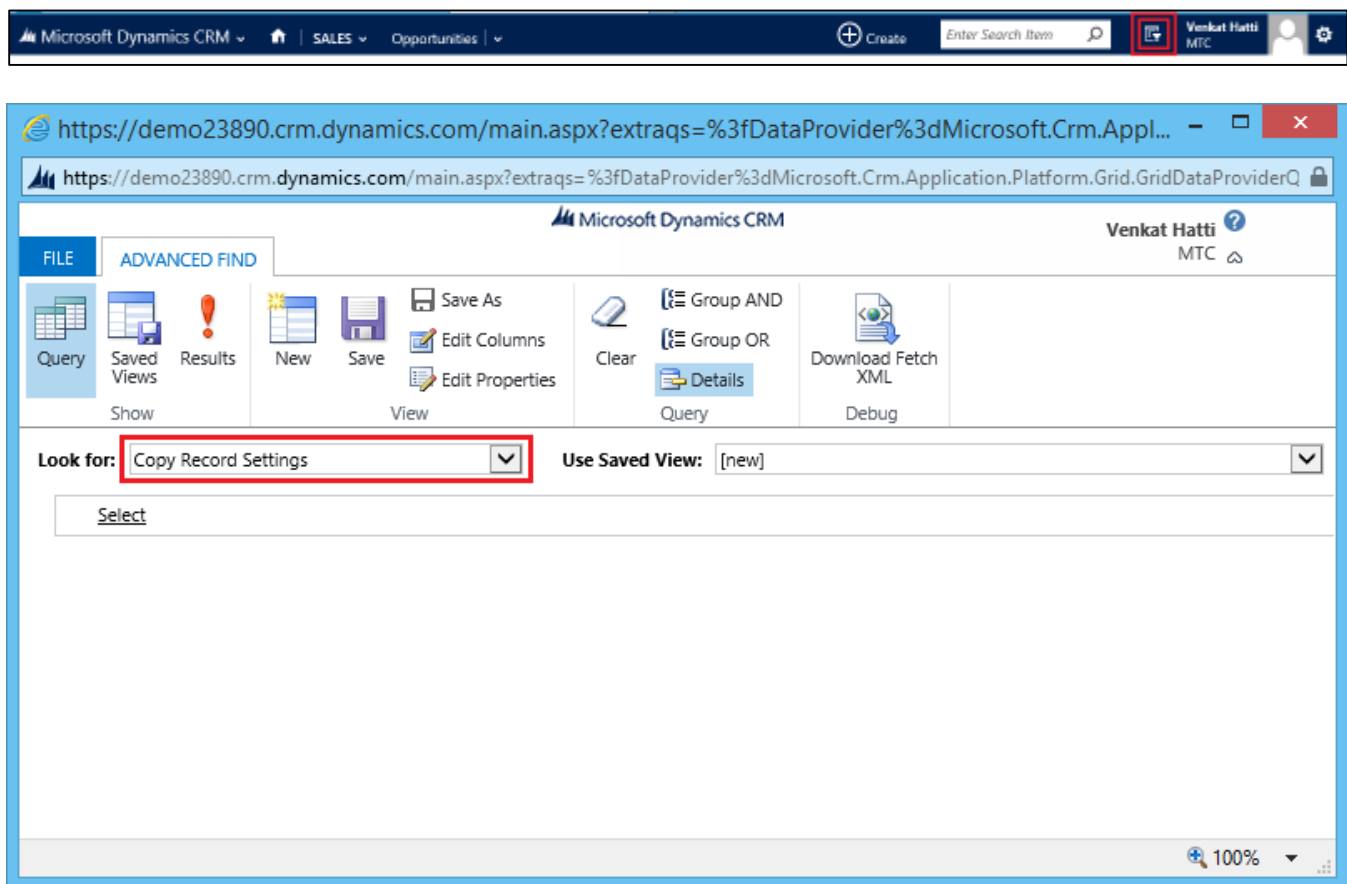
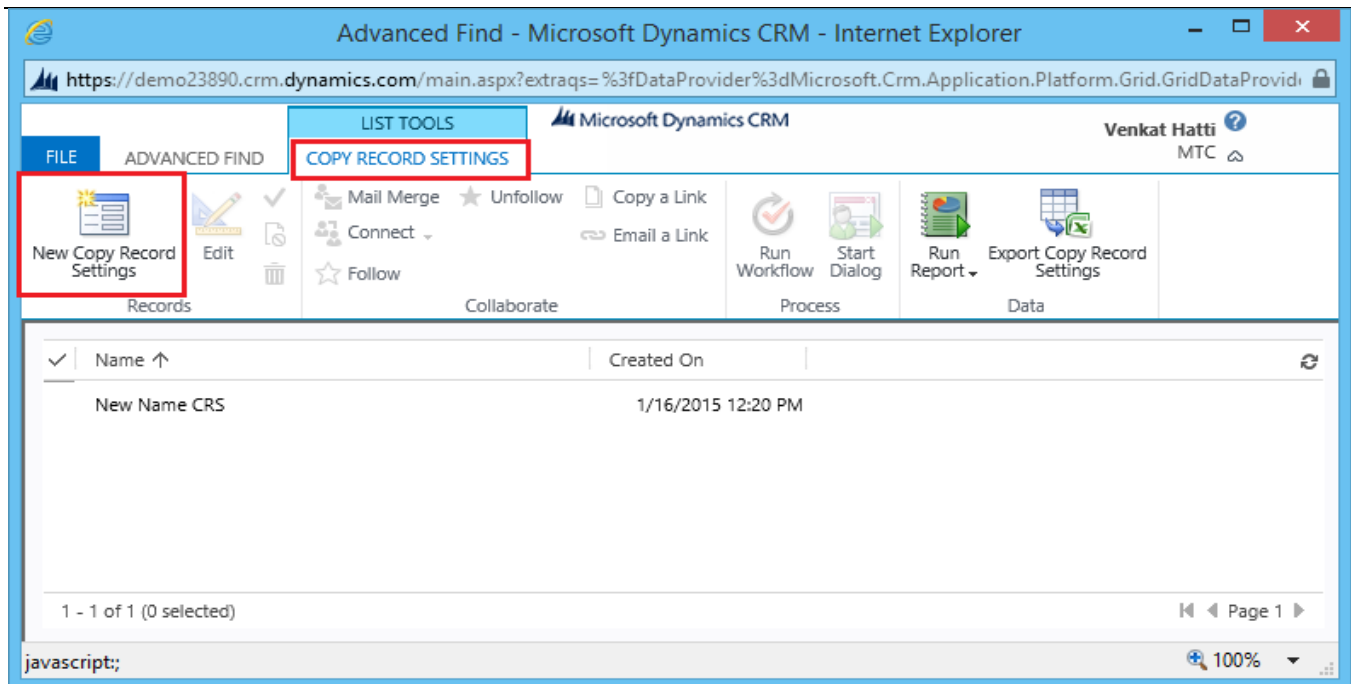


Figure 24: Advance Find pop up Screen

- Select “**Copy Record Settings**” from the Dropdown list provided
- Click on Results Tab on the Ribbon to get results
- Click on “New Copy Record Setting” Tab on the Top Left corner of the ribbon



- As mentioned always you will have two options 1: N or N: N relations

Example for 1: N relationship

CRM Admin
CopyRecordSet

SAVE + NEW FORM

COPY RECORD SETTINGS : INFORMATION

New Copy Record Settings

General

Name * New Name CRS

Primary Entity * account

Related Entity * email

Relationship Type * 1:N

Relationship Name * Account_Emails

Lookup Logical Name * regardingobjectid

Notes

Figure 25: New Copy Record Setting

- Input Name of your choice
- Input Primary Entity (In this case it will be Account Logical name only)
- Input Related Entity (In this case it will be email logical names only)
- Select Relationship type from the Drop down list (1: N or N:N)

Both the Relationship Name and Lookup logical name should be the same which is in Relationship details of Account to Email as shown below

- Select Name from Relationship Definition and Name from Lookup field and place them in the right
- Click on Save and Close to quit this operation.
- To know how to open Relationship form please see figure 16 in the next page. (for reference)

Relationship: Account to E-mail - Windows Internet Explorer

https://copyrecordindia.crm5.dynamics.com/tools/systemcustomization/relationships/manageRelationship.aspx?appSolutionId=%7bFD140AA1

File Save and Close Show Dependencies Managed Properties Help

Relationship
Account to E-mail

Working on solution: Default Solution

Common
Information

General

Relationship Definition

Primary Entity * Account Related Entity * E-mail

Name * Account_Emails

Lookup Field

Display Name * Regarding Name * regardingobjectid

Requirement Level * No Constraint

Description Unique identifier of the object with which the e-mail is associated.

Navigation Pane Item for Primary Entity

Display Option * Do not Display Custom Label *

Display Area * Details Display Order * 0

Relationship Behavior

Type of Behavior * Parental

Assign * Cascade All Reparent * Cascade All

Share * Cascade All Delete * Cascade All

Unshare * Cascade All Merge * Cascade All

100%

Figure 26: Relationship Details

How to get Relationship form?

Go to **Settings->Customizations->Customize the system->Click on Entities** and under Entities click on **Account** and Select your choice of relationship such as **1: N**

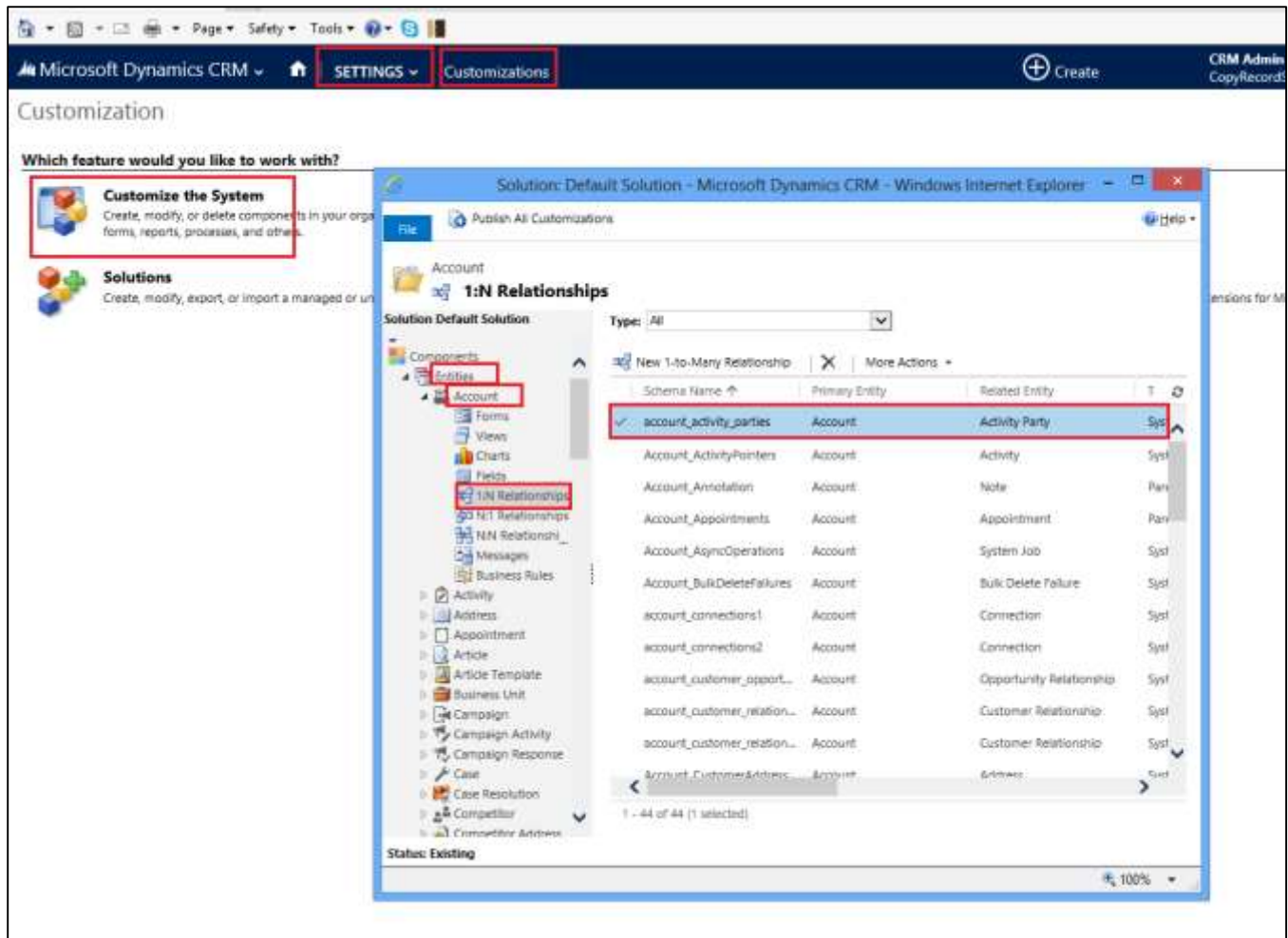


Figure 27: How to Open Relationship form

- Click on `account_activity_parties` as shown to open the relationship form.

Example for N: N relationship

- Go to Relationship form

Relationship
Account to Invoice

Working on solution: Default Solution

Common
Information

General

Current Entity

Entity Name * Account

Display Option * Do not Display

Display Area * Details

Custom Label *

Display Order * 0

Other Entity

Entity Name * Invoice

Display Option * Do not Display

Display Area * Details

Custom Label *

Display Order * 0

Relationship Definition

Name * new_account_invoice

Relationship Entity Name * new_account_invoice

Figure 28: Relationship Details

- Get the Relationship Entity Name from the form and place it in Relationship name as shown

CRM Admin
CopyRecordSet

SAVE + NEW FORM

COPY RECORD SETTINGS : INFORMATION

New Copy Record Settings

General

Name * New NtoN relation

Primary Entity * Account

Related Entity * invoice

Relationship Type * N:N

Relation Ship Name * new_account_invoice

Notes

Figure 29: New Copy Record Setting

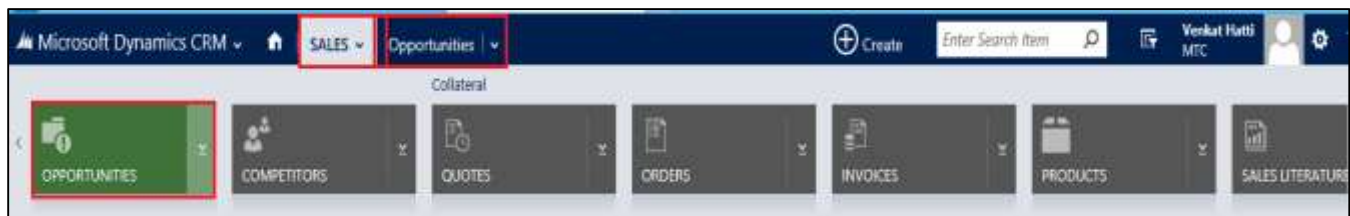
- Click on Save and Close to quit

Copy Record Set for Other entities

The Other entities are Invoice, Order, Quote, Case, Opportunity, Price list along with all their products such as Quote product, Invoice product etc.

After setting up the relationship for Account, Contact or Lead the functionality of the Copy record set remains the same for all as shown below.

Open **CRM->Sales->Opportunity** select any of the Record as shown (New Opportunity for Test) **and** click on the COPY NEW icon on the ribbon



Select the record, Click on Copy New button as shown below

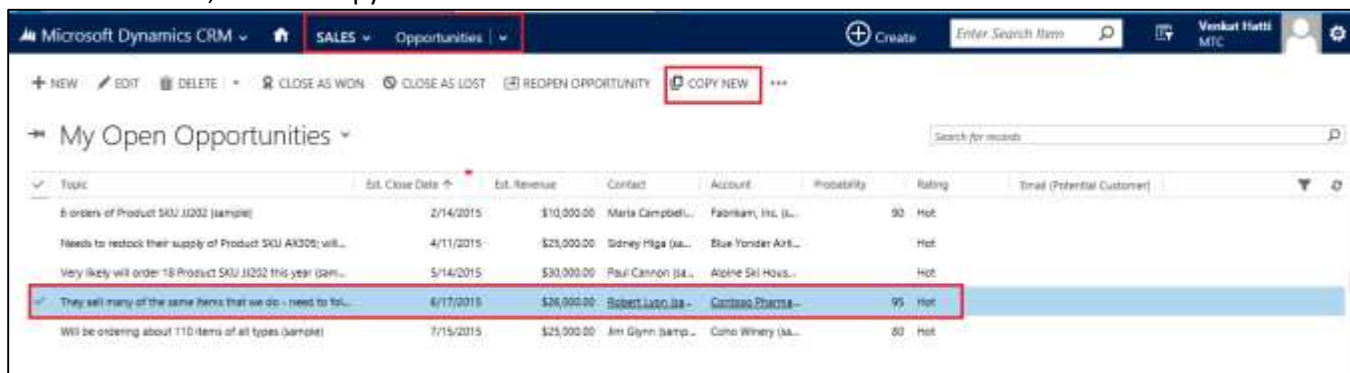
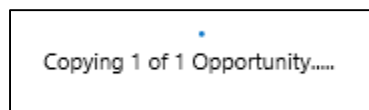


Figure 30: CRM screen showing Opportunities

- On click of the **COPY NEW** tab, it copies the present record with [Copy] as extension, and displays the following message while copying.



- After copying is completed you can see in the same screen a new record is created as "xxxx_xxxxxx_Copy" is created.

Topic	Est. Close Date	Est. Revenue	Contact	Account	Probability	Rating	Email (Potential Cu)
6 orders of Product SKU JJ202 (sample)	2/14/2015	\$10,000.00	Maria Campbell	Fabrikam, Inc. (sa...		90	Hot
Needs to restock their supply of Product SKU AK305; will purchase at least 25-50 (sample)	4/11/2015	\$25,000.00	Sidney Higa (sa...	Blue Yonder Airl...			Hot
Very likely will order 18 Product SKU JJ202 this year (sample)	5/14/2015	\$30,000.00	Paul Cannon (sa...	Alpine Ski Hous...			Hot
✓ They sell many of the same items that we do - need to follow up (sample)_Copy	6/17/2015	\$26,000.00	Robert Lyon (sa...	Contoso Pharma...		95	Hot
✓ They sell many of the same items that we do - need to follow up (sample)	6/17/2015	\$26,000.00	Robert Lyon (sa...	Contoso Pharma...		95	Hot
Will be ordering about 110 items of all types (sample)	7/15/2015	\$25,000.00	Jim Glynn (samp...	Coho Winery (sa...		80	Hot

Figure 31: CRM showing new created record

- The Alternate method to copy an opportunity record is, click and open the record form and click on **COPY NEW** tab as shown below.
- On click on this tab, it again copies the same opportunity with _Copy and open the new record as also shown below

Microsoft Dynamics CRM | SALES | Opportunities | 6 orders of Product...

NEW | CLOSE AS WON | CLOSE AS LOST | RECALCULATE OPPORTUNIT... | **COPY NEW** | ASSIGN | EMAIL A LINK

OPPORTUNITY | 6 orders of Product SKU JJ202 (sample) | Est. Close Date: 2/14/2015 | Est. Revenue: \$10,000.00 | Status: In Progress | Owner: Venkat Hatti

Qualify | Develop | **Propose (Active)** | Close

Identify Sales Team: mark complete | Develop Proposal: mark complete | Complete Internal Review: completed | Present Proposal: completed

Summary

Topic: **6 orders of Product SKU JJ202 (sample)**

Contact: Maria Campbell (sample)

Account: Fabrikam, Inc. (sample)

Purchase Timeframe: This Year

Currency: US Dollar

Budget Amount: \$30,000.00

Purchase Process: ---

Description: ---

POSTS, ACTIVITIES, NOTES

Enter post here

Both Auto posts User posts

6 orders of Product SKU JJ202 (sample)

Opportunity: Created by Venkat Hatti for Account Fabrikam, Inc. (sample).

On 6 orders of Product SKU JJ202 (sample)'s wall

1/12/2015 12:33 PM

STAKEHOLDERS

Name | Role

No stakeholders found.

Figure 32: Opportunity form shown Copy New tab

Delete a Record.

- Select the record and click on DELETE and confirm it by clicking it OK to Delete. See Below

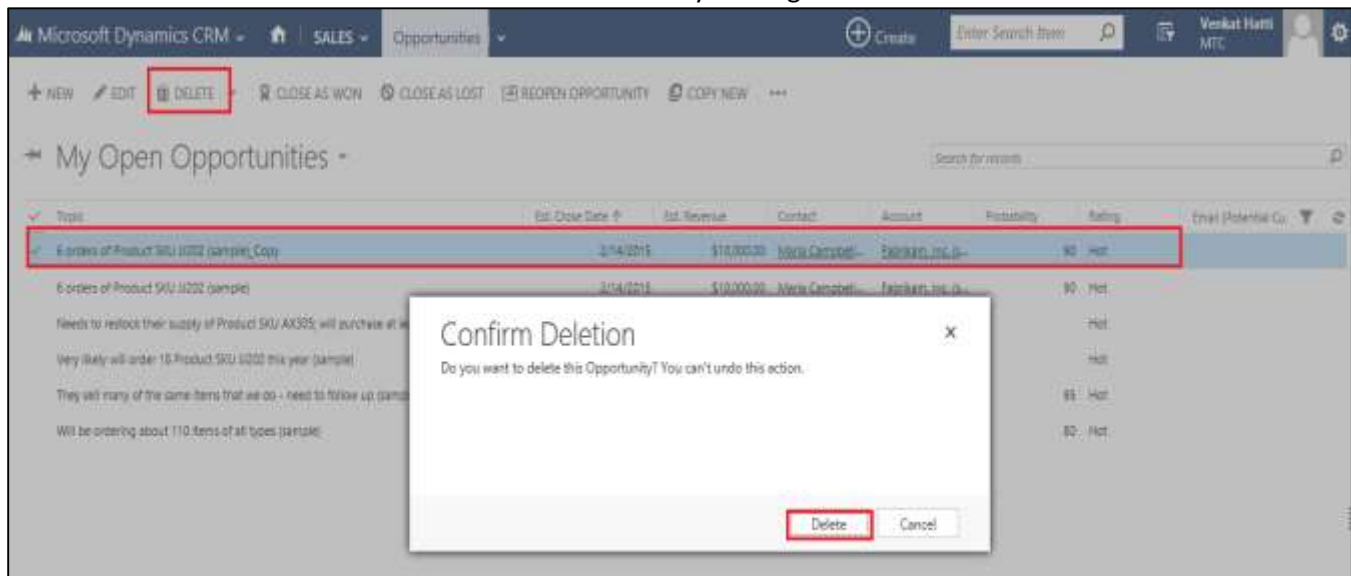


Figure 33: Delete a Record

Copy Record Set Functionality Chart

Copy Record Set Functionality		
No	Entity Name	Description
1	Account	Copying Account, and its Notes and its Relationships
2	Contact	Copying Contact ,and its Notes and its Relationships
3	Lead	Copying Lead, and its Notes and its Relationships
4	Invoice	Copying Invoice and its Products, and its Notes
5	Order	Copying Order and its Products, and its Notes
6	Quote	Copying Quote and its Products, and its Notes
7	Case	Copying case and its Notes and its Activities
8	Opportunity	Copying Opportunities and its Products, and its Notes
9	Quote Product	Copying only Quote Product
10	Order Product	Copying only Order Product
11	Invoice Product	Copying only Invoice
12	Opportunity Product	Copying only Opportunity Product
13	Price List	Copying only Price list

Uninstallation Process

- To uninstall Copy Record Set Navigation is **Settings** → **Solutions** → Select the check box of **MTC_CopyrecordSet** then click on **Delete** as shown below.

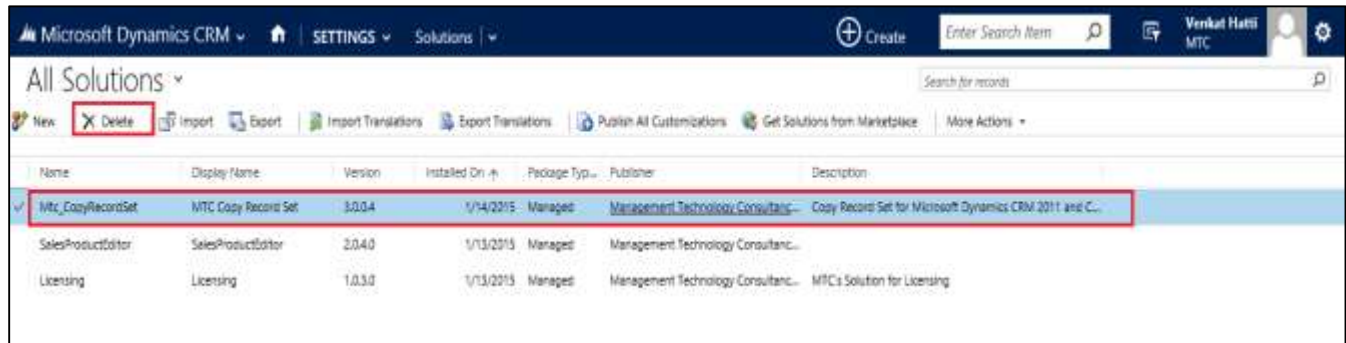


Figure 34 : Deleting Copy Record Set Solution

- Click on **OK** to delete the solution from CRM. The solution will be deleted

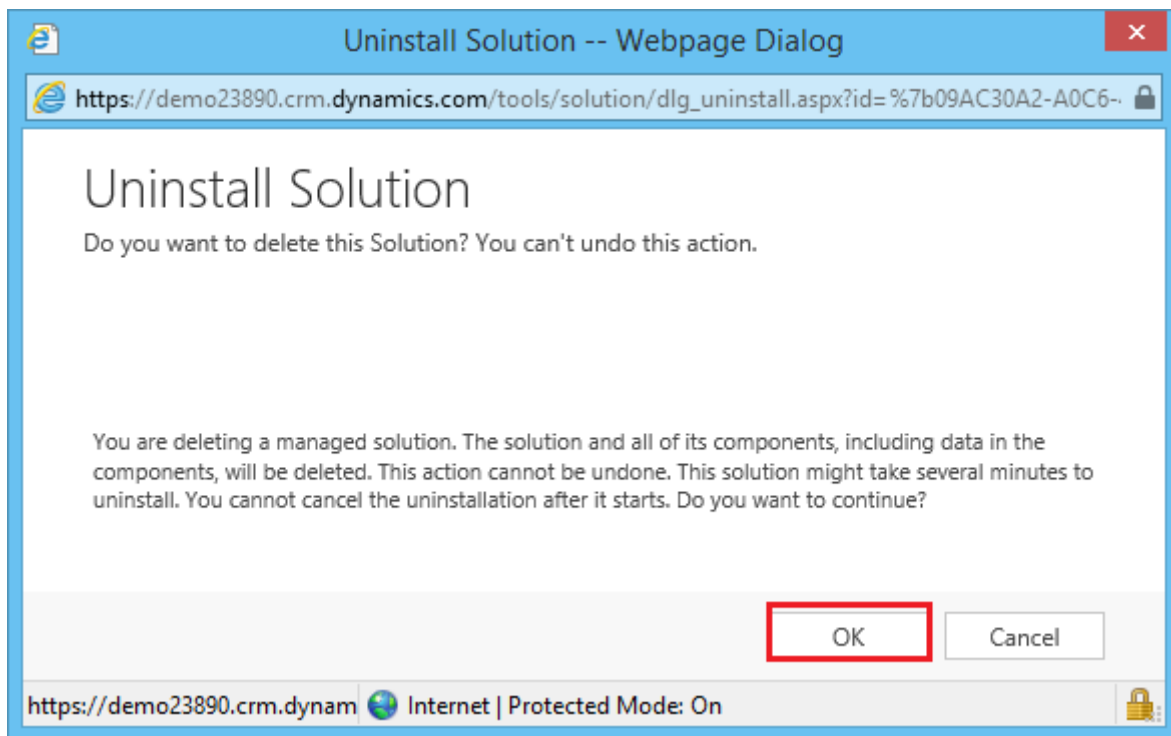


Figure 35 : Uninstall Solution

- Follow the above process to delete the Licensing solution

MTC Overview

MTC develops an ever growing and extensive family of add-on products, complete solutions, and core development technologies for the Microsoft Dynamics CRM platform. MTC supports a product development effort with a highly efficient global Microsoft CRM exclusive services business 24/7. MTC's products represent the refinements in functionality, deliverability, and long-term maintainability of unique highly customized Microsoft Dynamics CRM platform business solutions suggested as most important in MTC's global volume customization business. MTC runs its internal operations and many of its partners and affiliates with this example



Small and medium sized businesses (SMB) can now affordably build the kind of enterprise automation system that distinguishes the best unique-line-of-business enterprises on earth. MTC uniquely delivers a very-unique service of clear value to businesses globally seeking automation as a business advantage.

SMB Custom Enterprise is your business's exact fit for a complete low cost business-specific companywide automation solution - marketing to operations to accounting in a closed loop - built on the Microsoft Dynamics CRM platform technologies. Starting with the Microsoft CRM platform in either a monthly Online or wholly owned on premise implementation you choose from a large and growing set of packaged option functionality where you determine what non-standard additional functions you want on this solution, then add them.

For more information on the dozens of integrated products of the "SMB Custom Enterprise" solution set visit: www.MTCCRM.com MTC's low-cost and fixed-rate professional services current rate schedule: www.MTCCRM.com/MTC_Services.pdf.

Management Technology Consulting LLC (MTC) is dedicated exclusively to the Microsoft Dynamics CRM platform and CRM web portal technologies in the business of delivering add-on products and services.



MTC is a Microsoft Independent Solution Vender working on Microsoft CRM since the introduction of the platform. MTC's product offerings include development technologies for the Dynamics CRM platform, add-on enhancements of features and major functions to CRM, as well as complete vertical-market Enterprise versions of Dynamics CRM serving an every growing list of industries and organization types.



MTC's services are built on a global 24/7 rapid-response and low-cost and fixed-rate ease of engagement. MTC is US headquartered company optimized for low-cost on-demand global engagement with regionalized contacts and a development facility in Hyderabad India adjacent to Microsoft's facility.

The Global CRM Community DynamicsExchange.com

MTC is the founding and managing partner of the Microsoft Dynamics CRM platform Community at www.DynamicsExchange.com. Dynamics Exchange is crowd-source built and dedicated to driving down the costs of implementation and enhancement of the Microsoft Dynamics CRM platform with unique and innovative social networking and knowledge resource allocation processes.

Dynamics Exchange is the leading community free and open to Microsoft CRM uses and professionals for support, training, knowledge, products, and services worldwide.

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