Management Technology Consulting LLC

**Microsoft Dynamics CRM / XRM Platform**

# Copy Record Set

**For Microsoft Dynamics CRM**

# User Guide

Microsoft Dynamics CRM

**CRM Versions Supported: CRM 2013 and CRM Online**

Copy Record Set is an add-on Product for Microsoft Dynamics CRM 2013 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.

Coding Version: 2.0.0.1
Document Version: 2.0.0.2
Date of Document: OCT-31-2013

## Copyright



## Disclaimer

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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 |

# License Key

- To install Copy Record Set you will require License key, which you can get by sending an email Request to salesteam@mtccrm.com with your Organization Unique name.

- To access your Organization Unique name click on settings→Customizations→Developer Resources as shown below figure

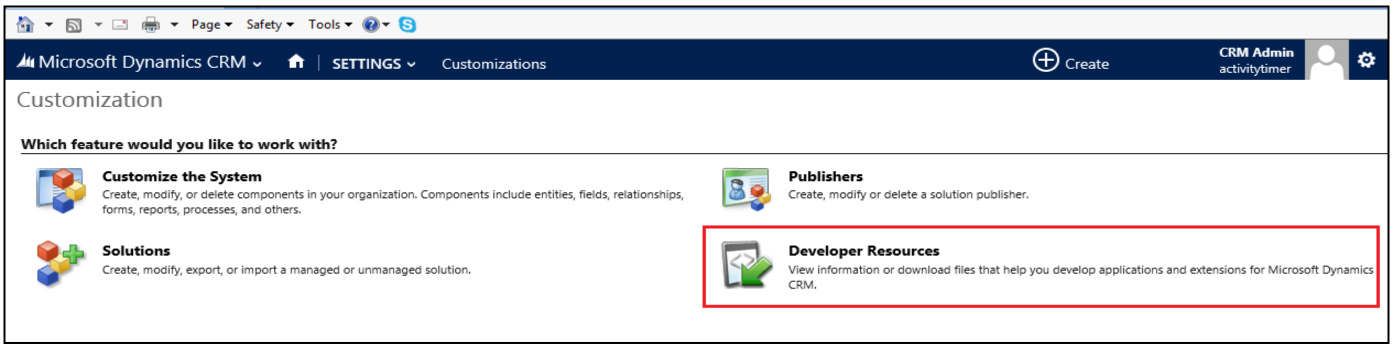



**Figure 1: Developer Resources**

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

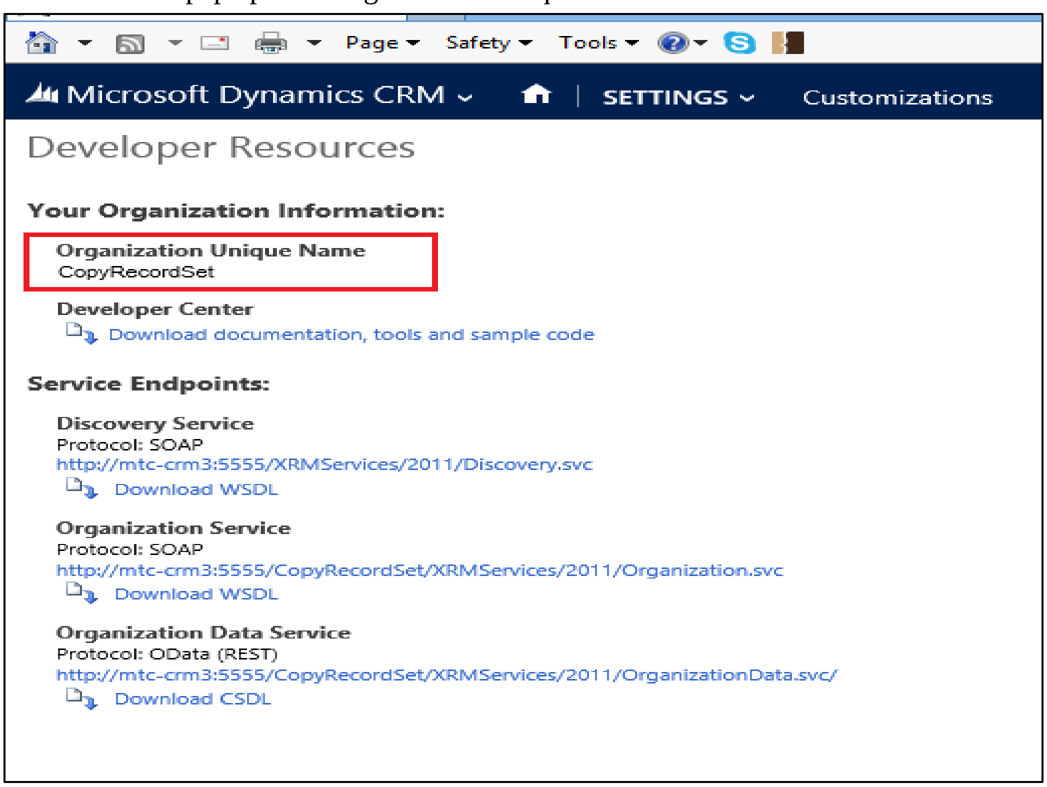



**Figure 2 : Organization Unique Name**

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

# Installation Process

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

**STEP 1:**

- Go to [http://www.dynamicsexchange.com/CR.aspx](http://www.dynamicsexchange.com/CR.aspx) click on Download to get Solution

**STEP 2:**

- On Downloading you will get **CopyRecordSet.zip** (ZIP file).
- Extract this Zip file to get


Mtc_CopyRecordSet_3_0_0_0_managed.zip


Licensing_1_0_3_0_managed.zip

**STEP 3:**

- Open your CRM click on settings→solution→import it will open import Solution window.

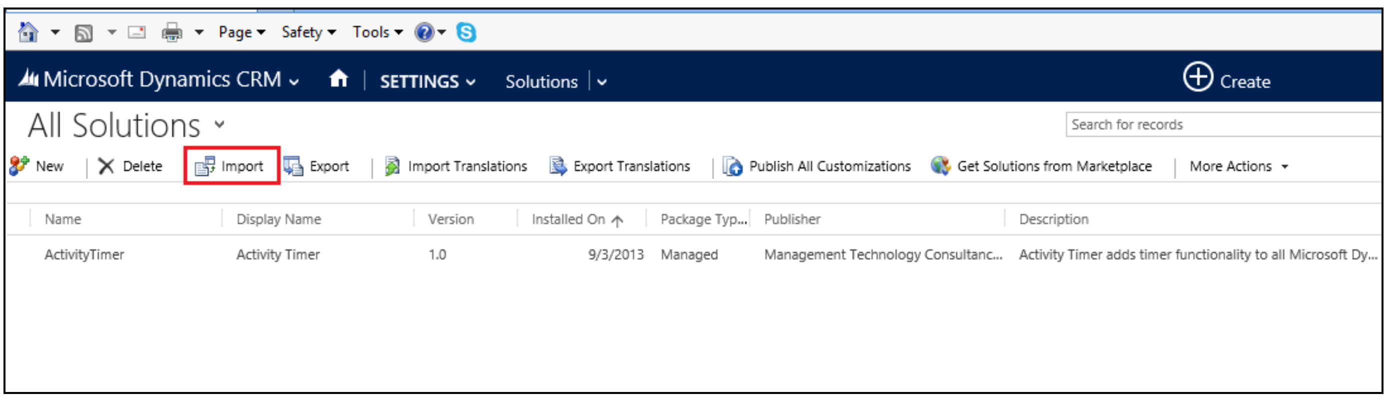



**Figure 3 : Import Solution**

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

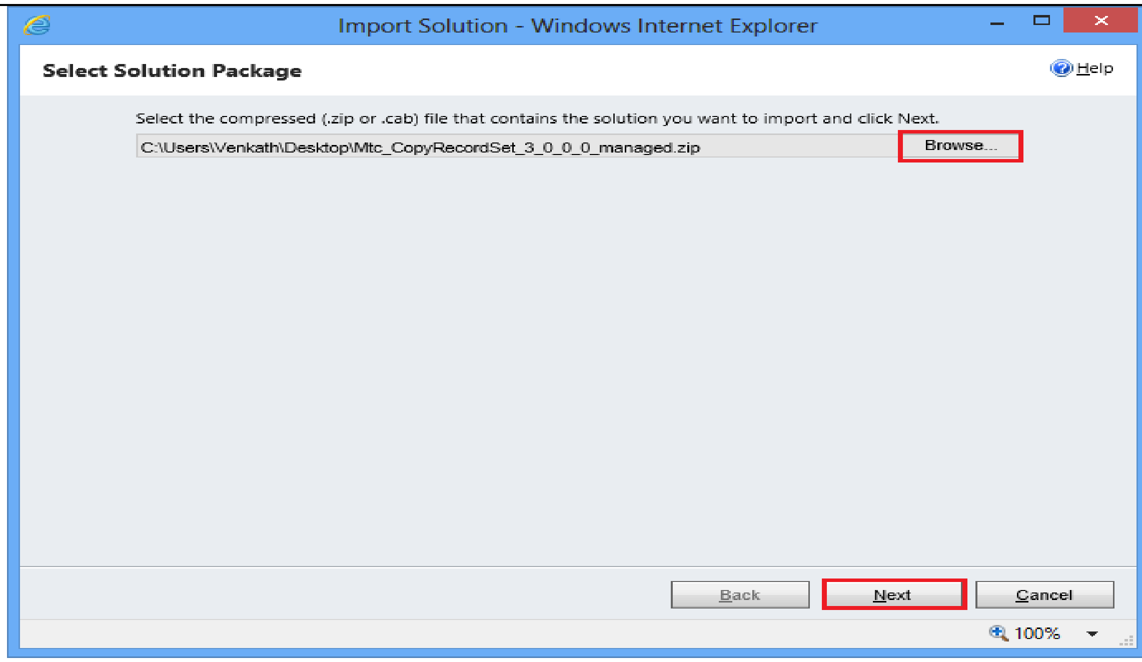



Figure 4 : Select Solution Package

- Click on **Next** after selecting the Copy Record Set Managed Solution

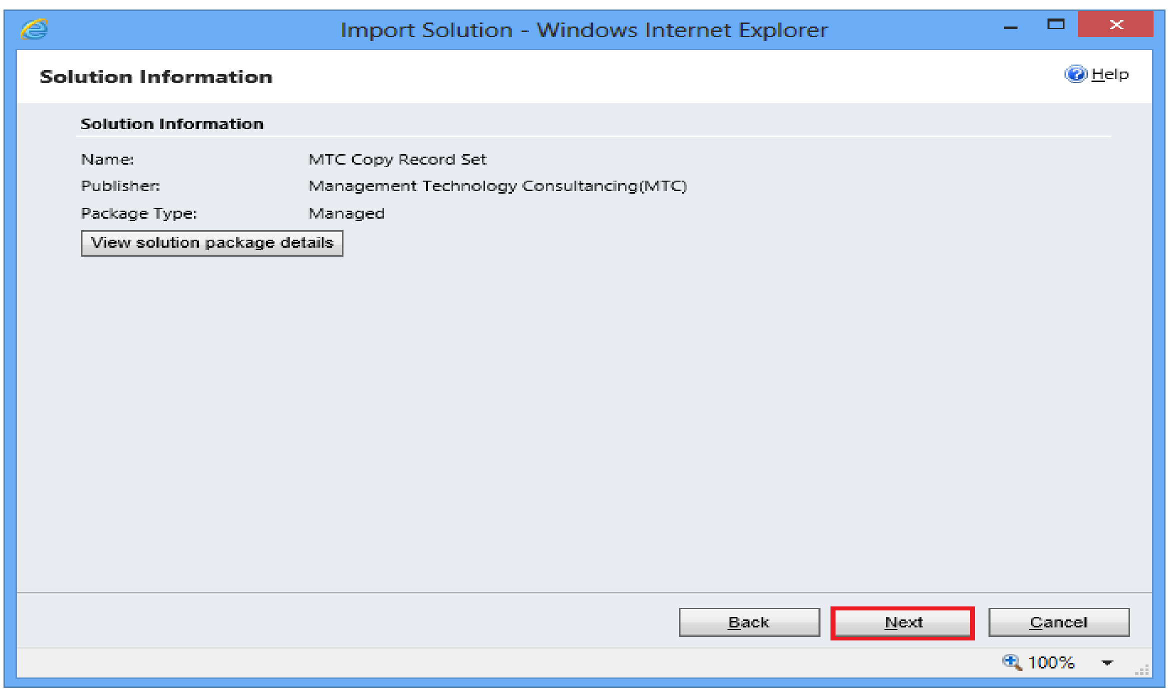



Figure 5 : Importing Options window

- Click on Next to Proceed
- Check the box to Activate the Process
- Click on Import to Proceed

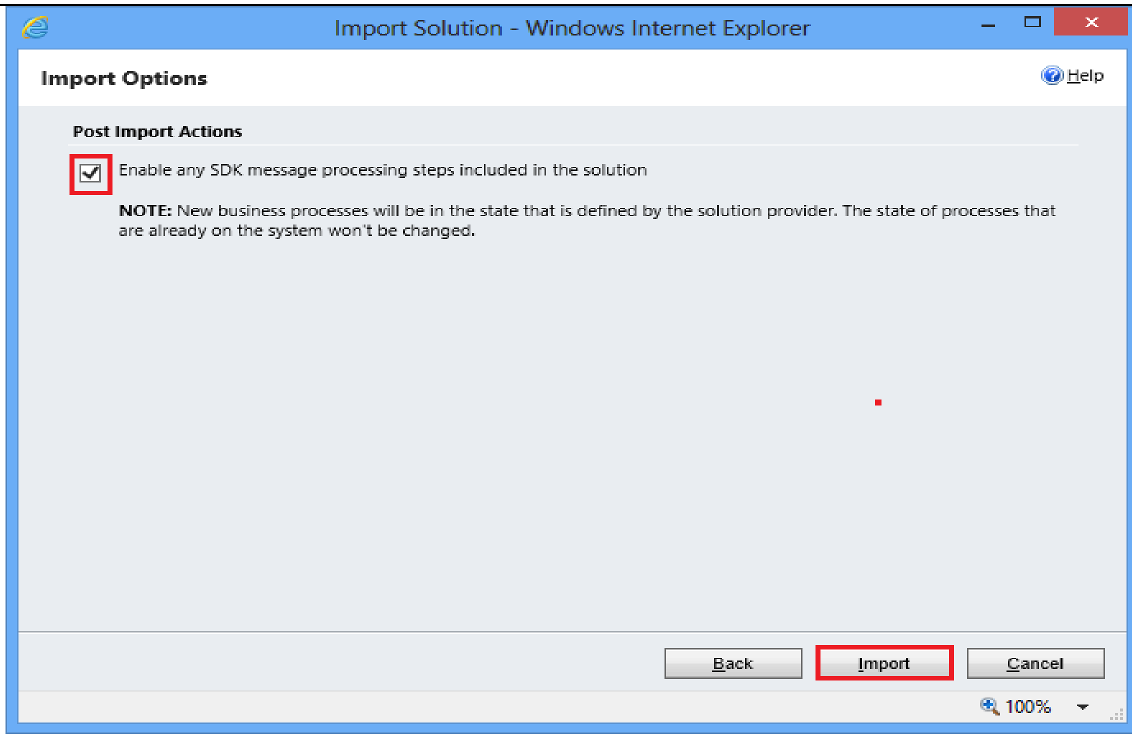



Figure 6: Import Solution

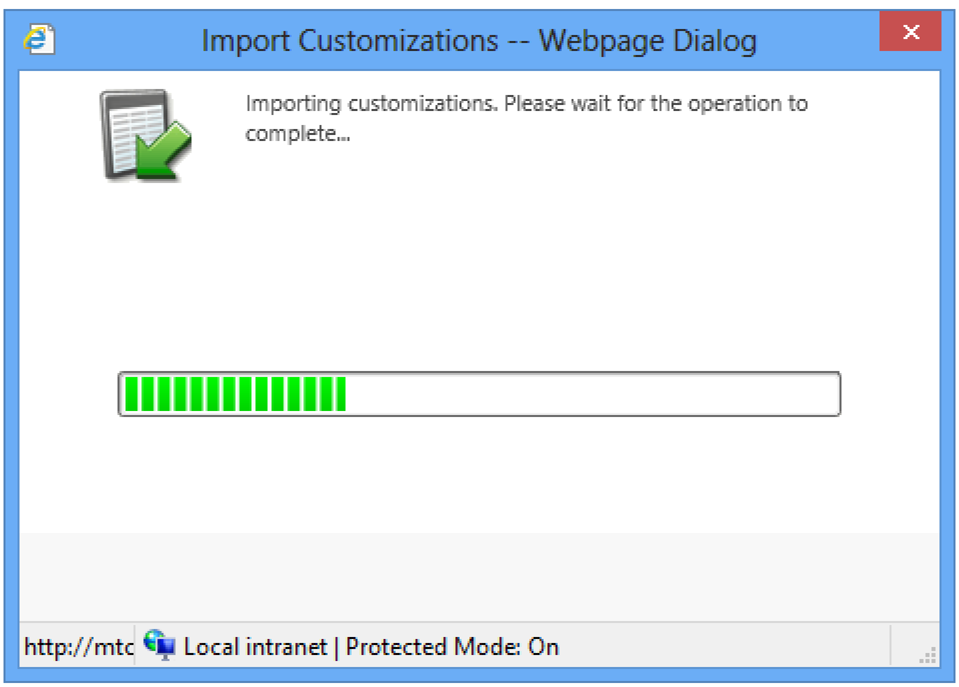



Figure 7 : Solution importing

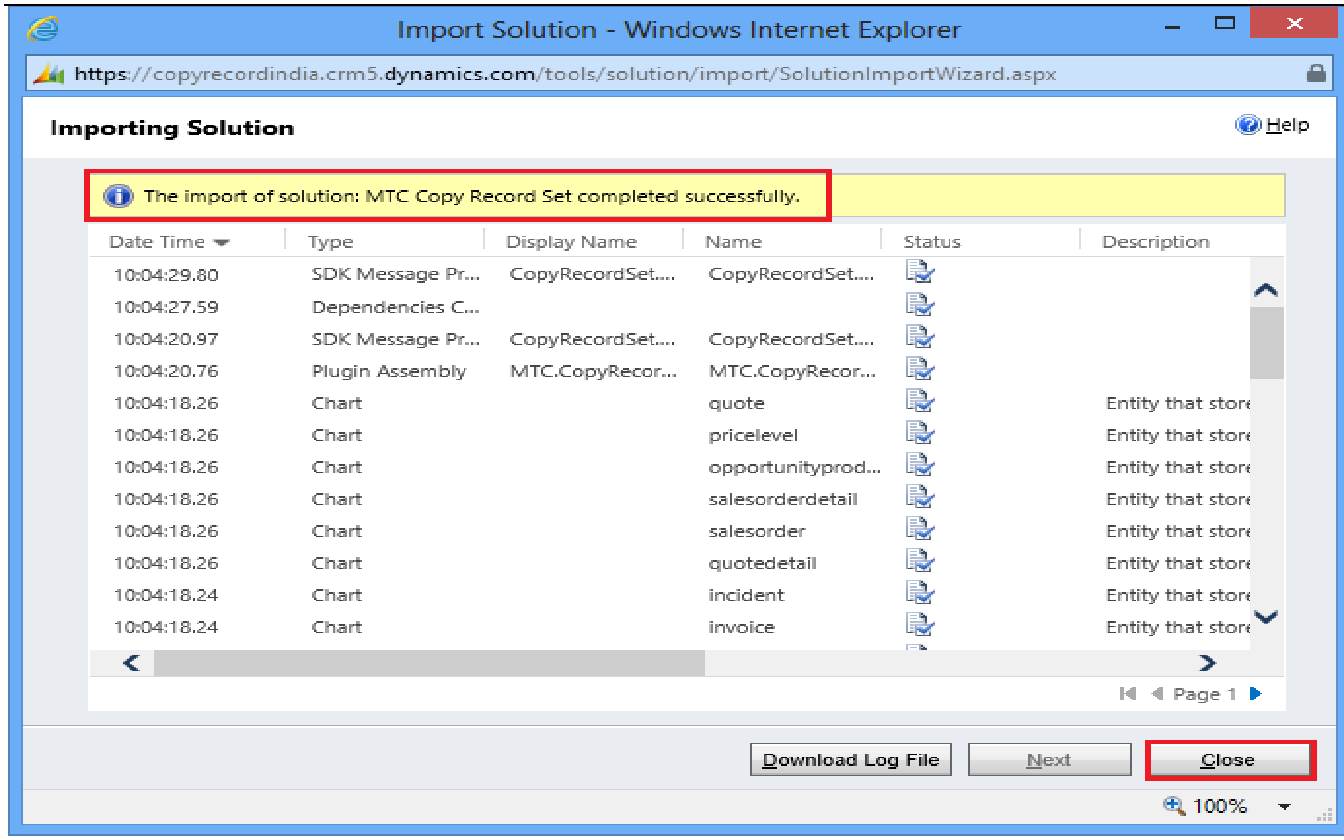



**Figure 8: Solution successfully imported**

- Click on Close Tab to Finish Successful installation of Managed Solution in to CRM
- Repeat STEP 3 for Licensing Solution installation.

# License Key Installation

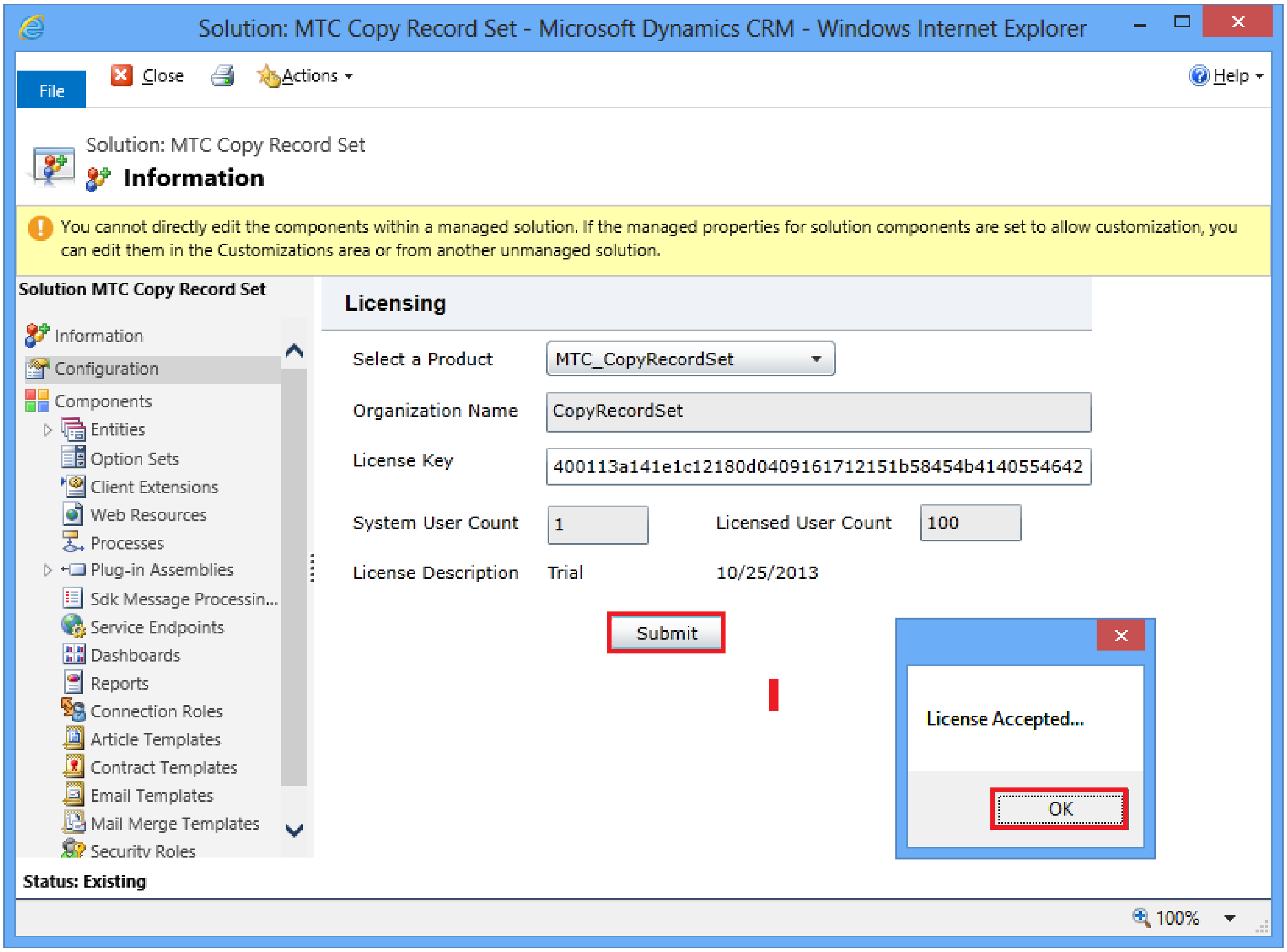



Figure 9 : Licensing window

- After importing the Copy Record Set Solution you need to place the License key navigate to **settings** → **solution** → Click on **Copy Record Set Managed** to open a new window as shown above
- Select the product as MTC_**CopyRecordSet from the Dropdown list**
- Enter the License key which you have received after placing the request and click on submit then a pop up window appears and displays the message **License Accepted**. Click on **OK**.

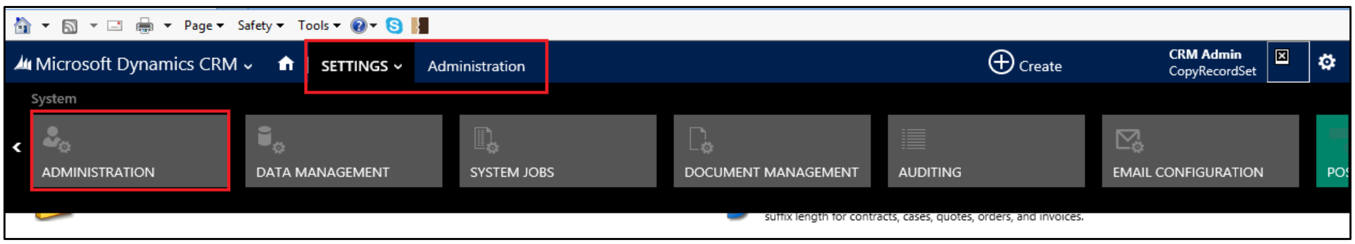
**NOTE: Send the Organization Name of your CRM to salesteam@mtccrm.com .**
**After placing the request you will receive the LICENSE KEY within 24 hrs.**

# 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 → Administration →Users** as shown below



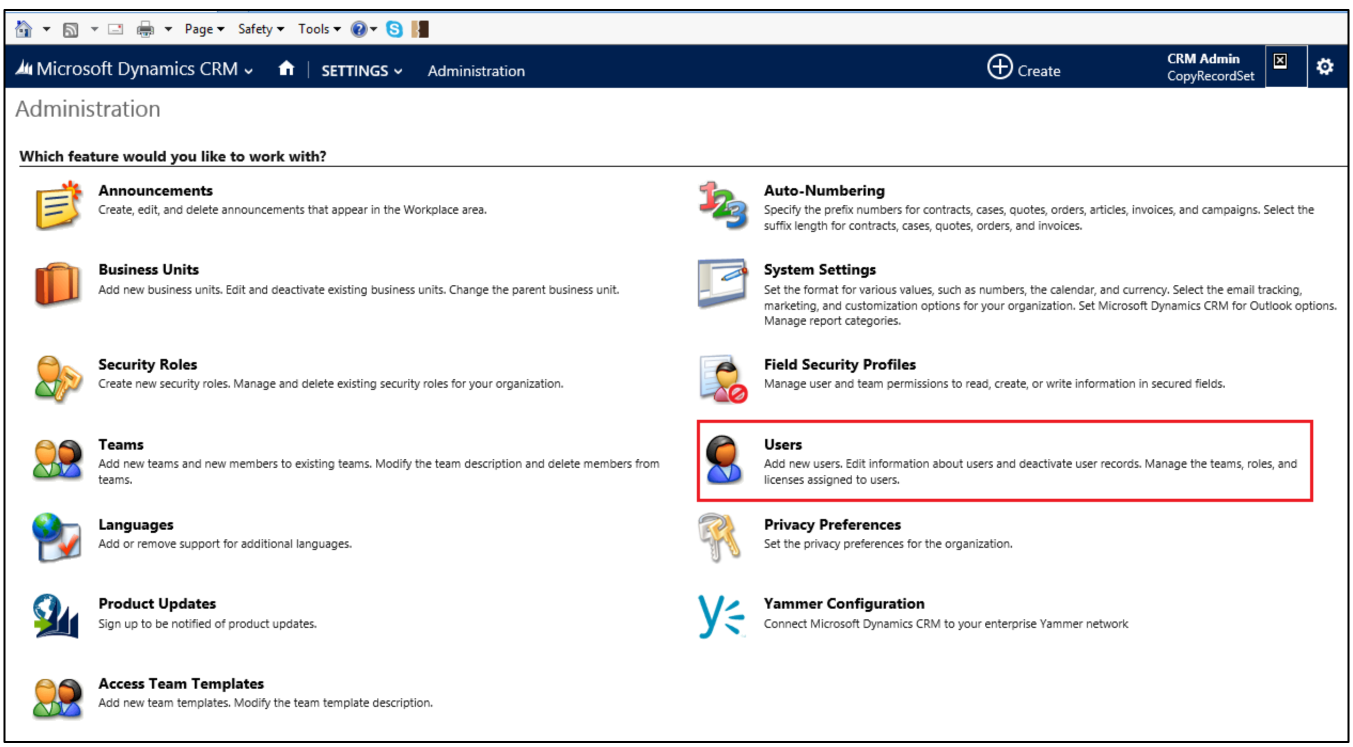




Figure 10 : User level Settings

- It opens a new window with a list of **Enabled Users** as shown in Figure.
- Select the check box of user name to make a modification
- Click on (...) more tab to get a list.
- Click on **Manage Roles** from the list

- To Create a new User click on New Icon on the top left corner and follow the procedure as it comes on screen

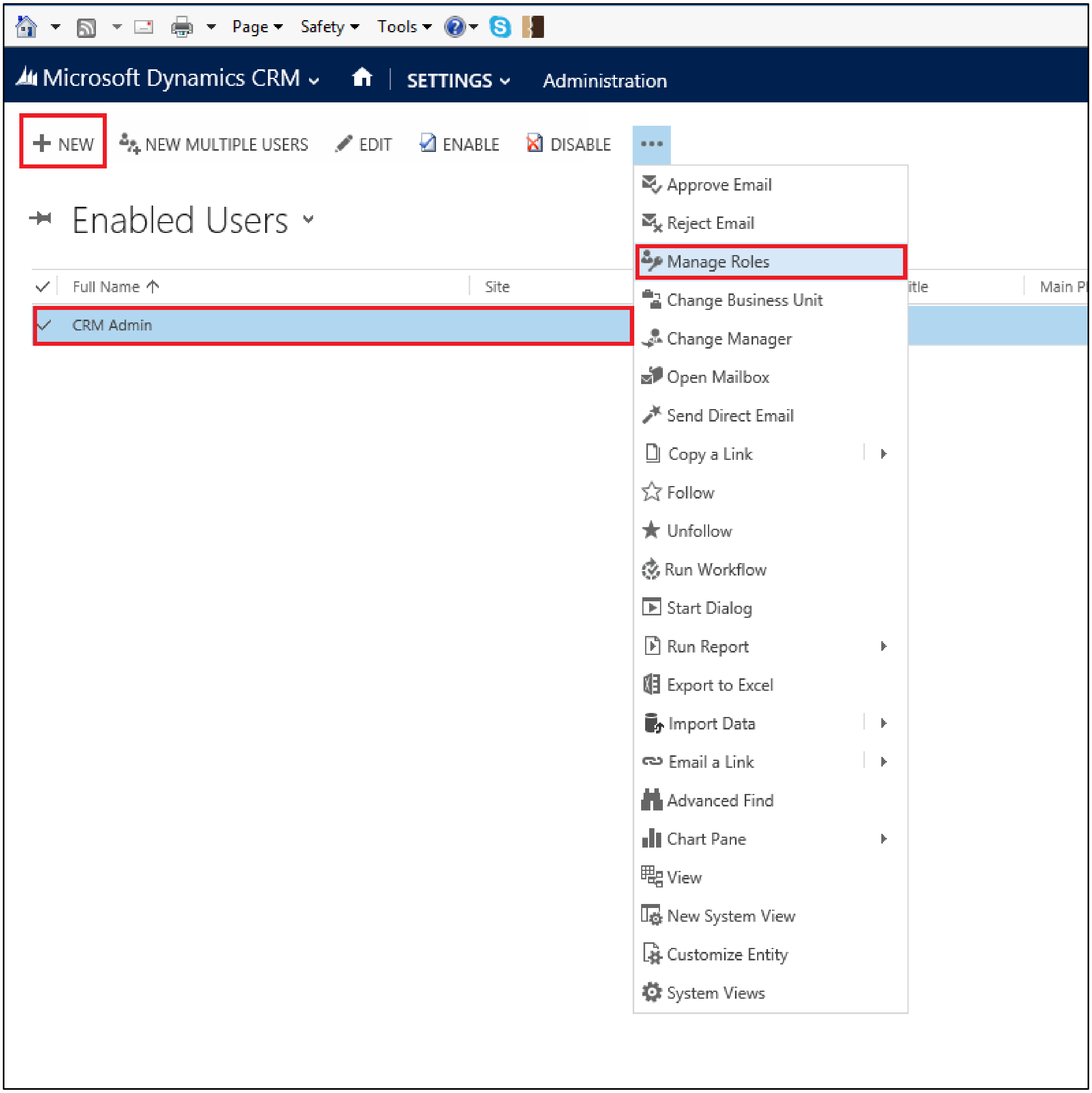



Figure 11 : Manage Roles

- 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.

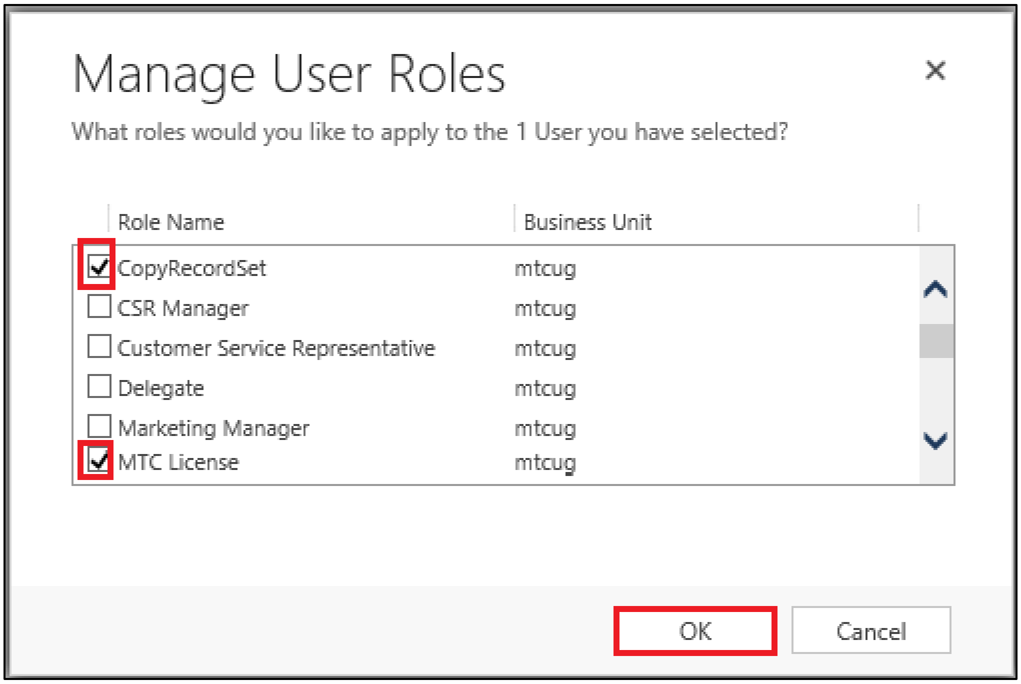
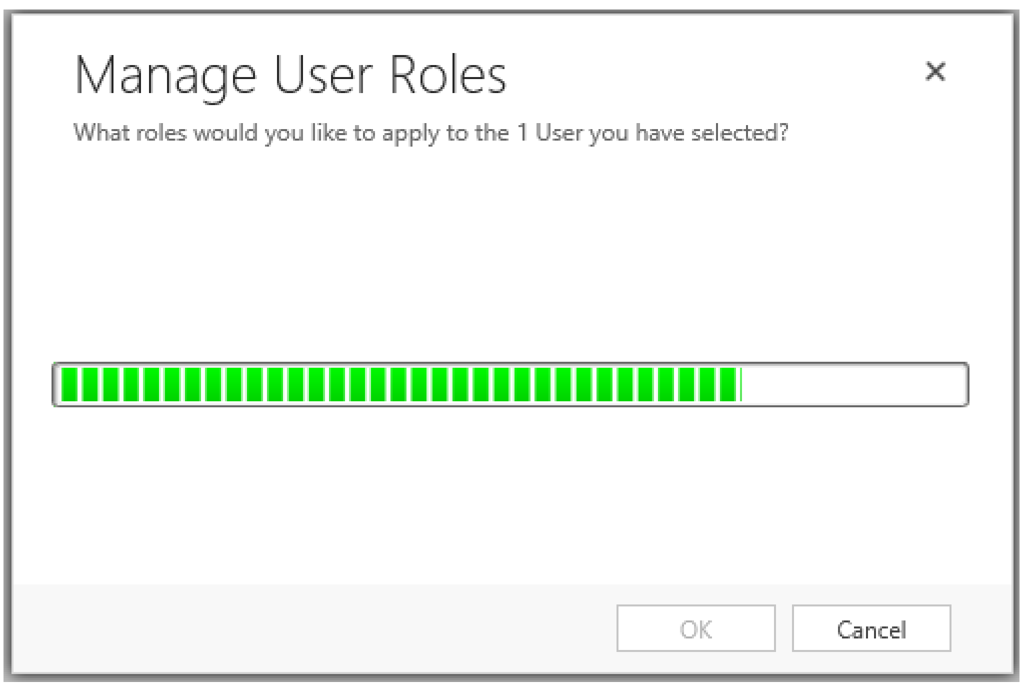



Figure 12 : Manage User Roles



# Security Roles in detail for Other Users.

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

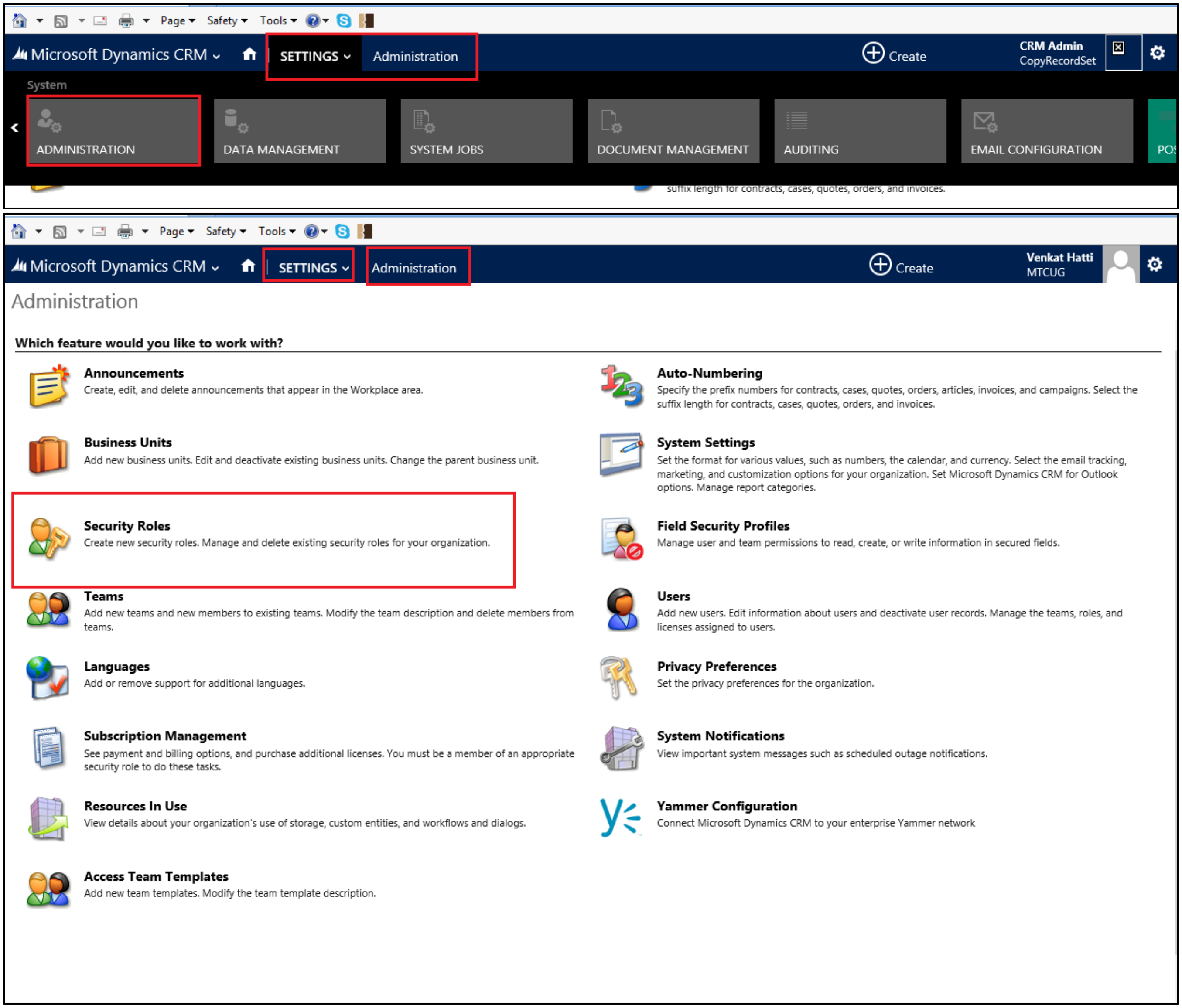



Figure 13: Security Roles Setting

- On click the CRM navigates to Security Roles Page., where in if you select **CopyReecordSet** as shown Below in Figure 14.
- Click on **CopyReecordSet** and a new pop up screen opens up for **Security Role : CopyReecordSet**,
- Now click on Custom Entities tab to display the various option to select in from of a table

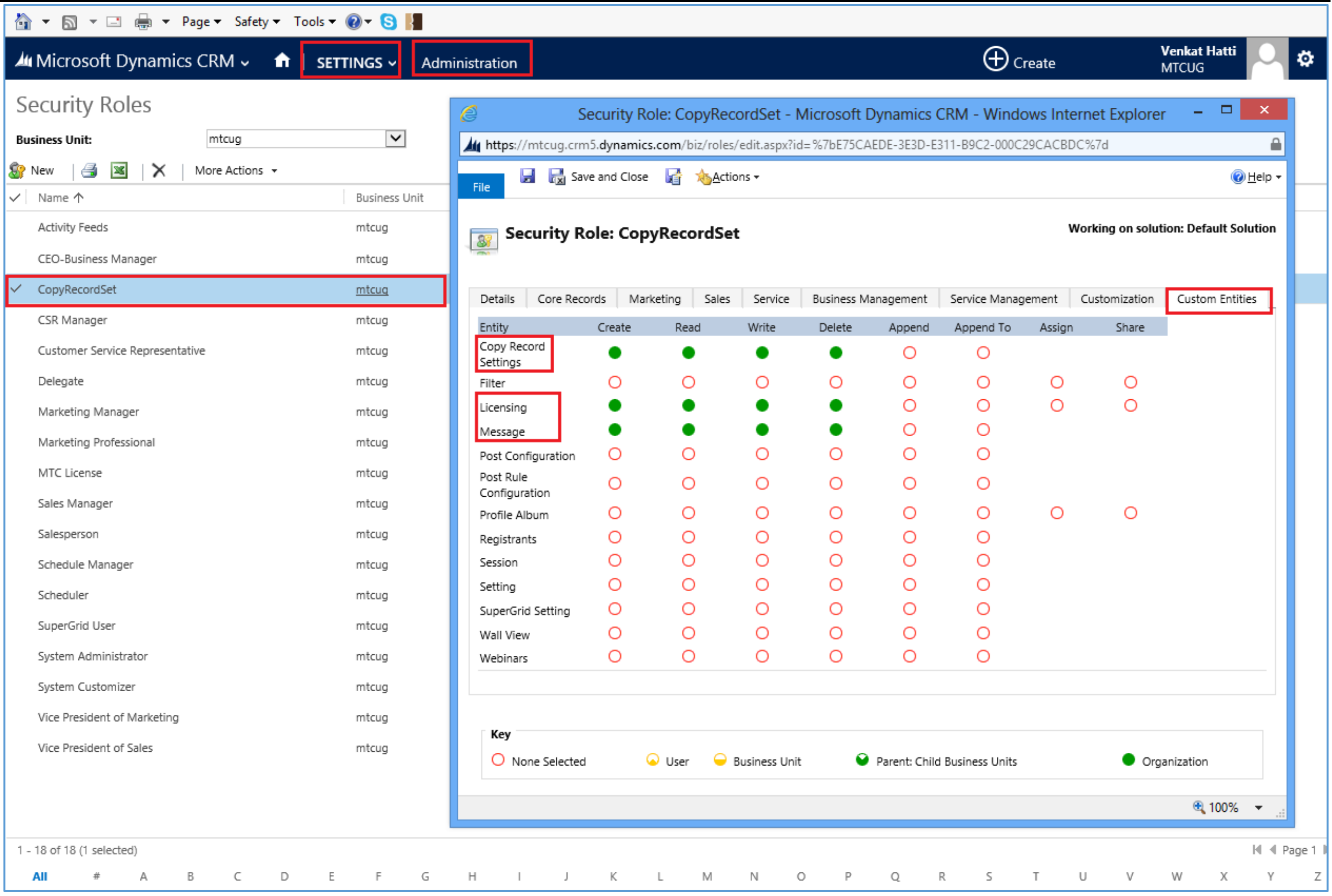



Figure 14: Security Role: in detail for user

- 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.

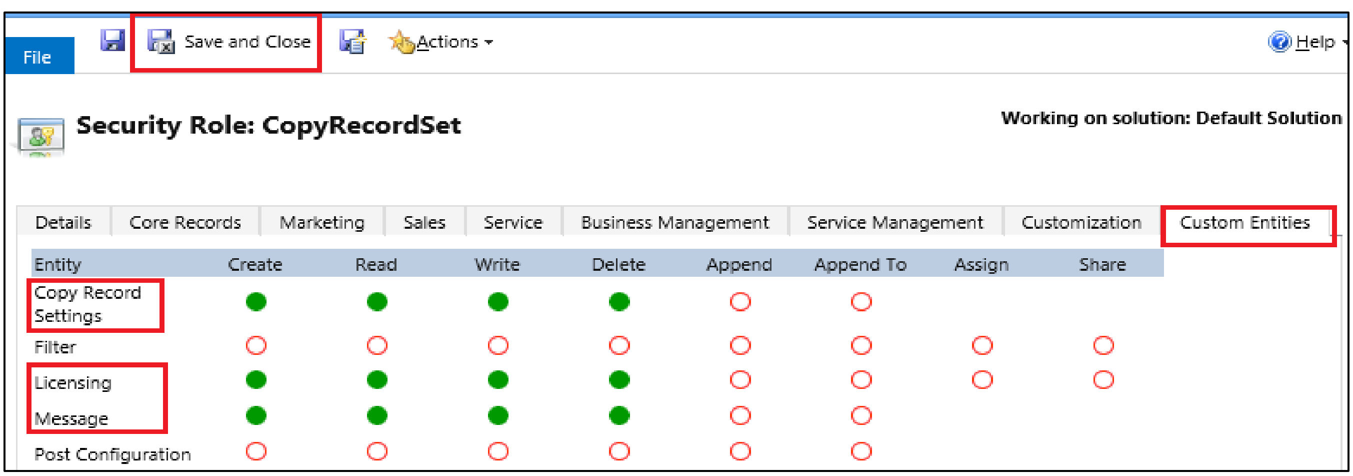



Figure 15: Security Role: Copy Record Set

# 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.

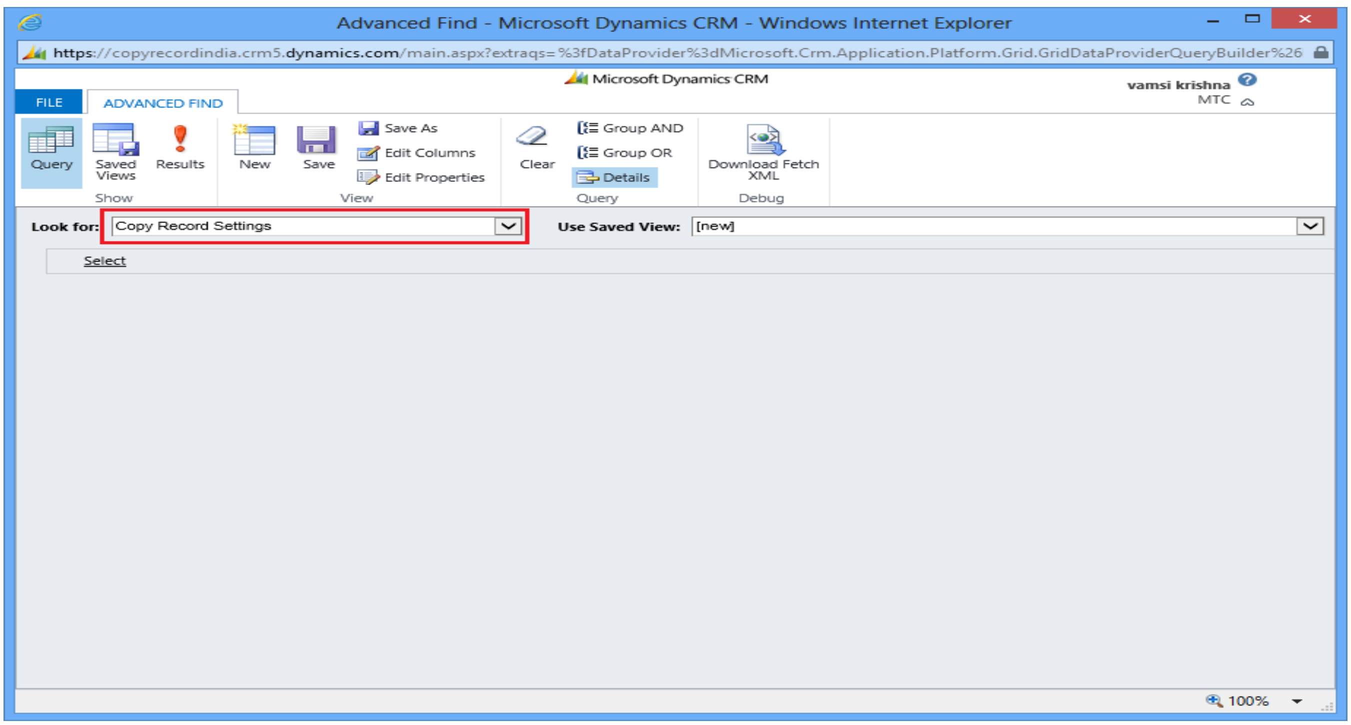
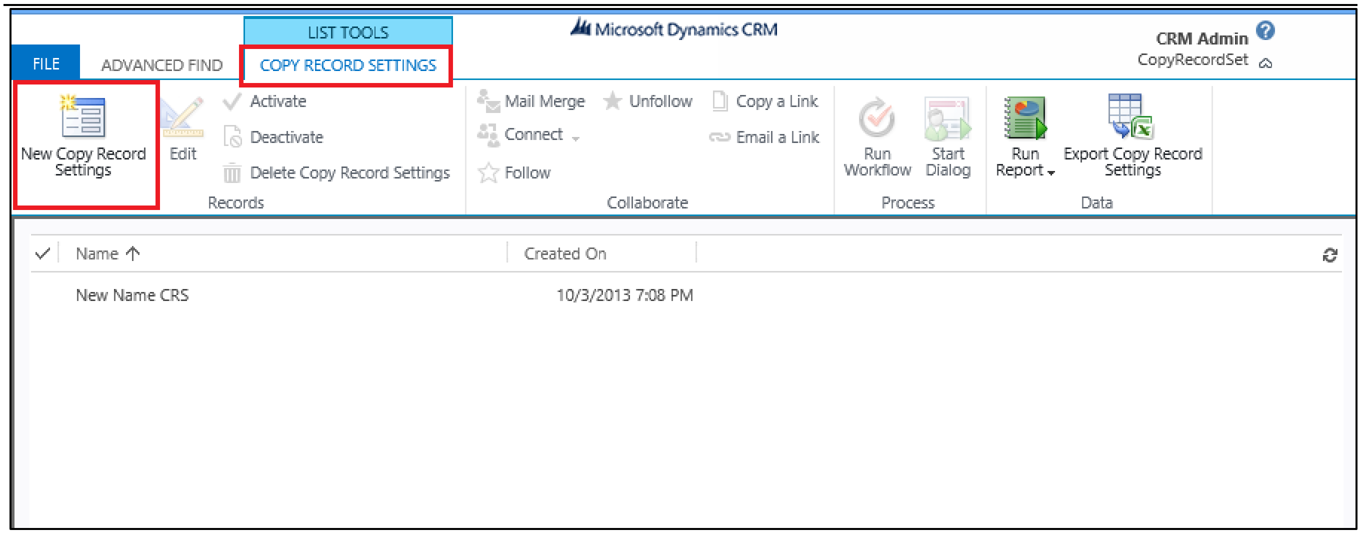



Figure 16: Advance Find pop up Screen

- 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

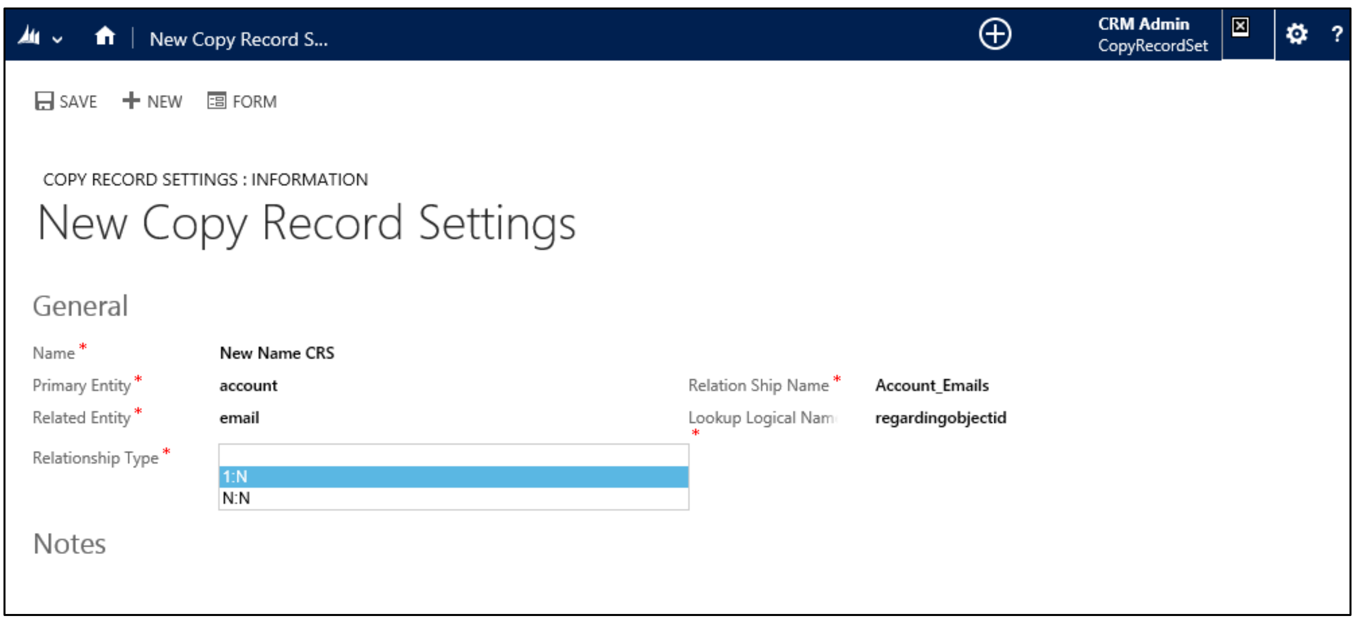



**Figure 17: New Copy Record Setting**

- 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)

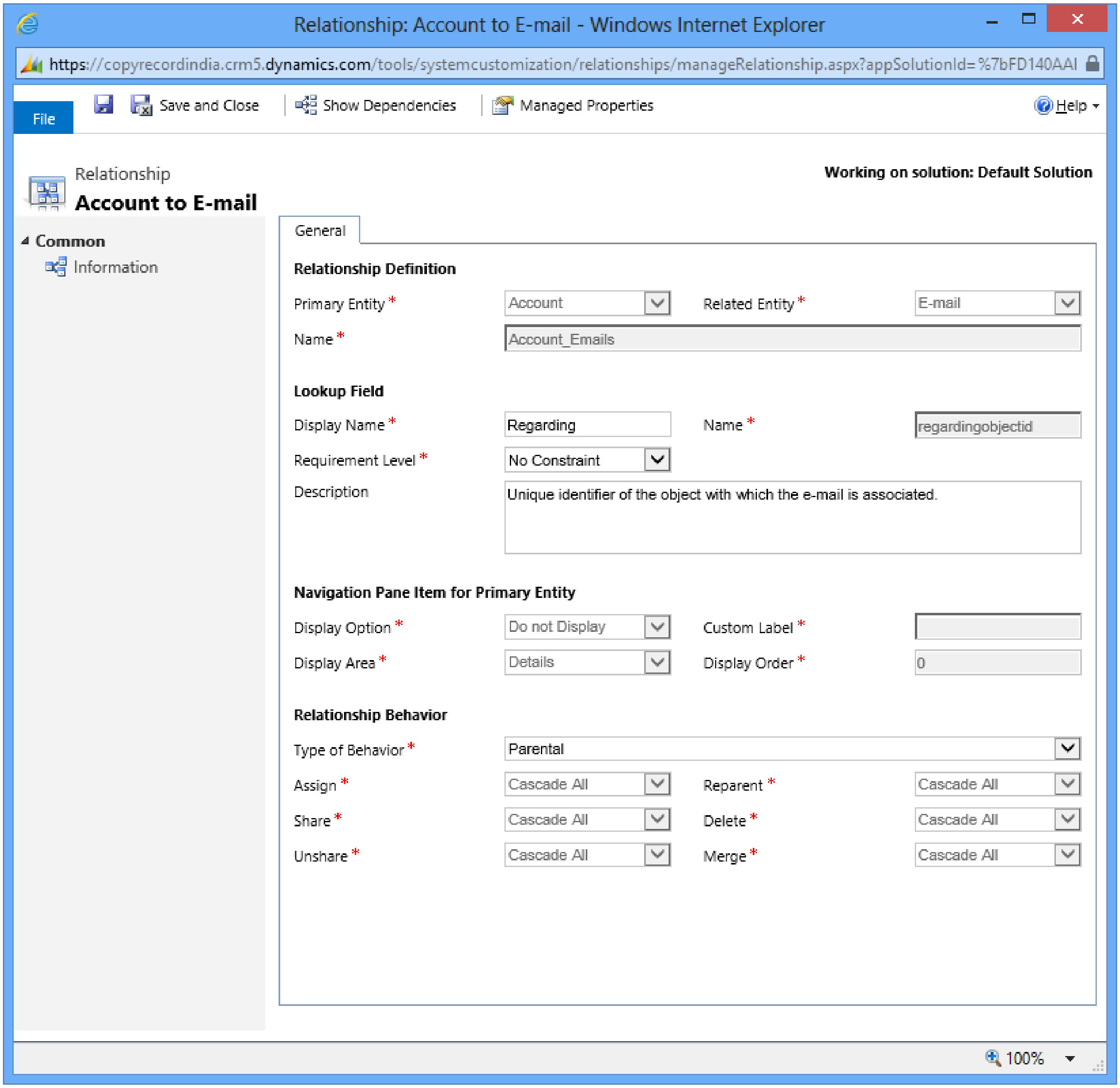



Figure 18: Relationship Details

## 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**

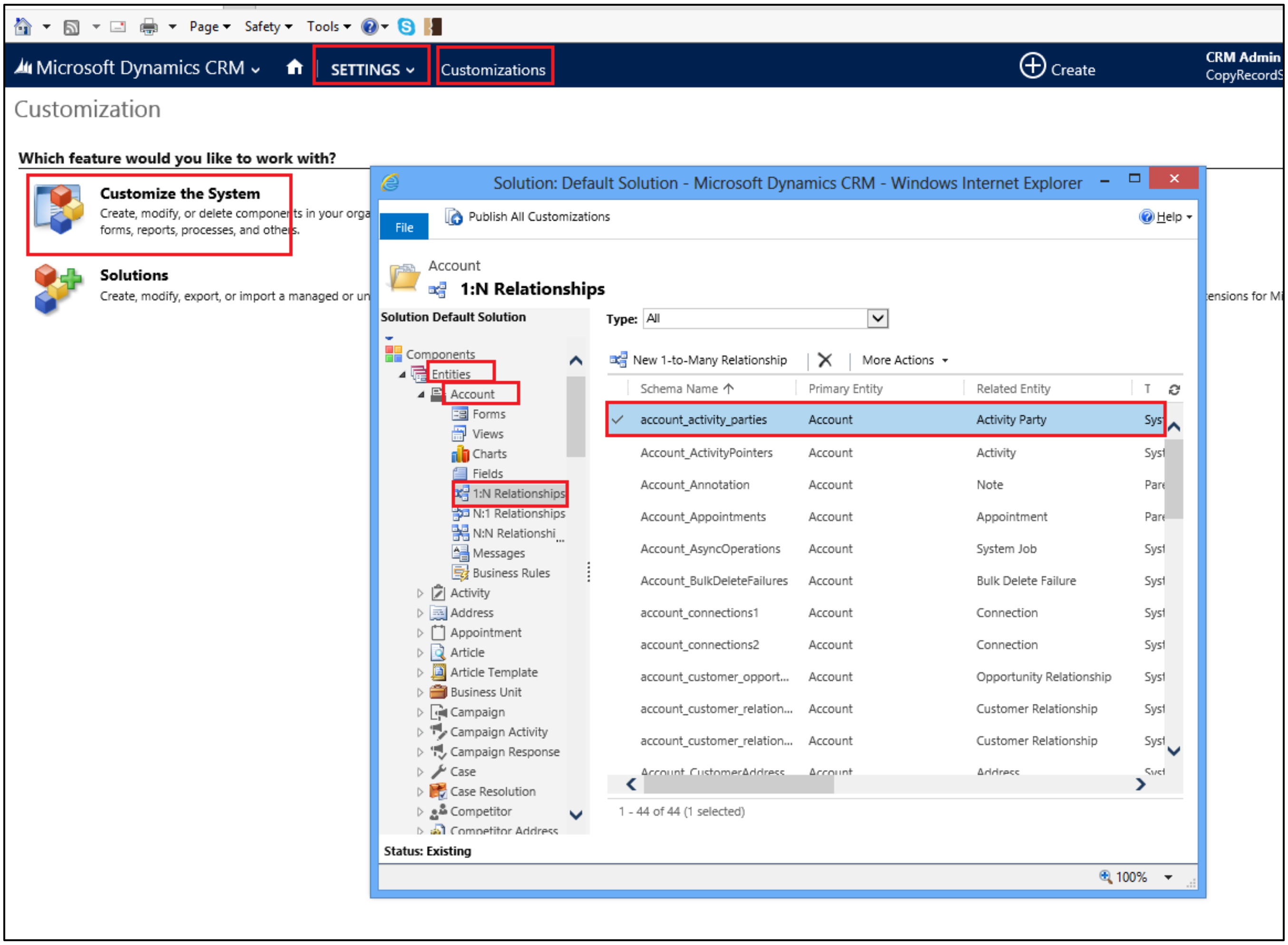



Figure 19: How to Open Relationship form

Click on account_activity_parties as shown to open the relationship form.

## Example for N: N relationship

- Go to Relationship form

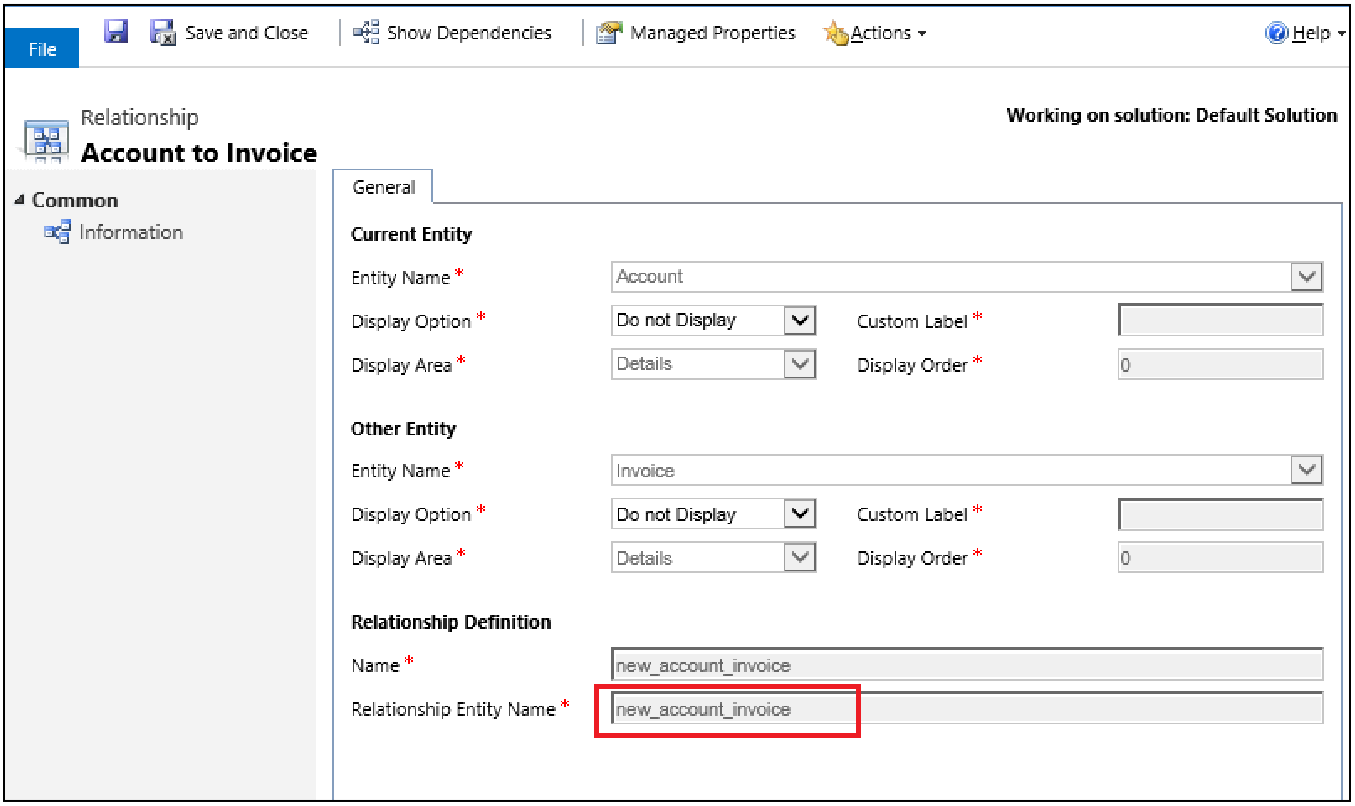



Figure 20: Relationship Details

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

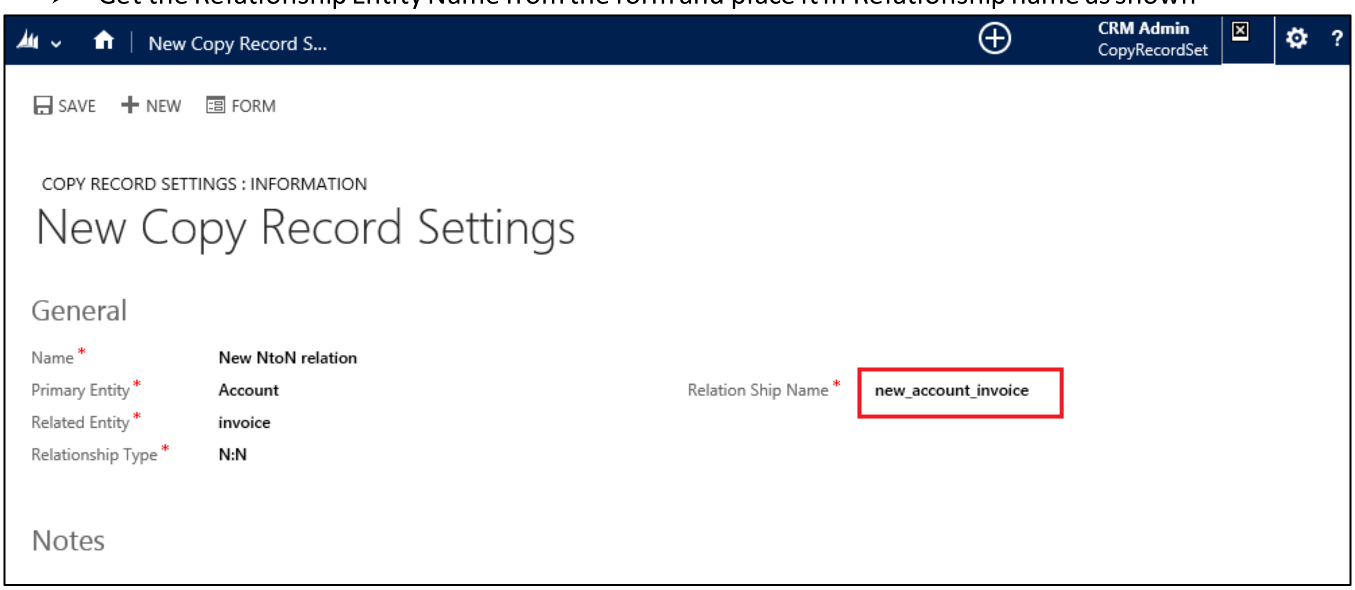



Figure 21: New Copy Record Setting

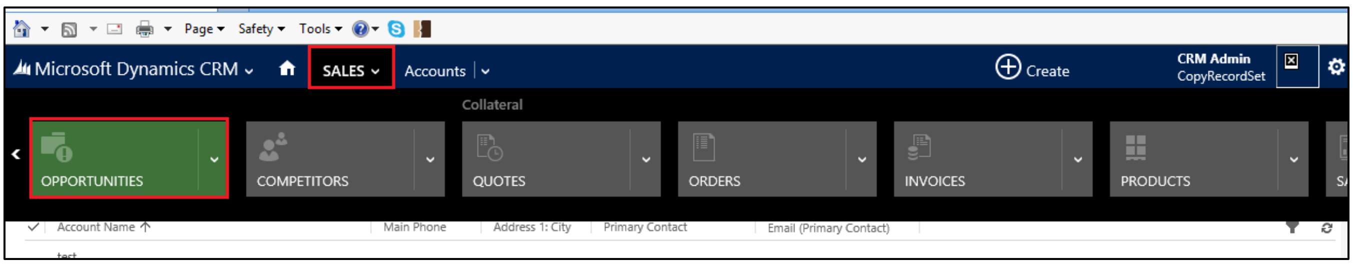
- Click on Save and Close to quit

# 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 (...) more tab to get a list, Select Copy New from the list as shown

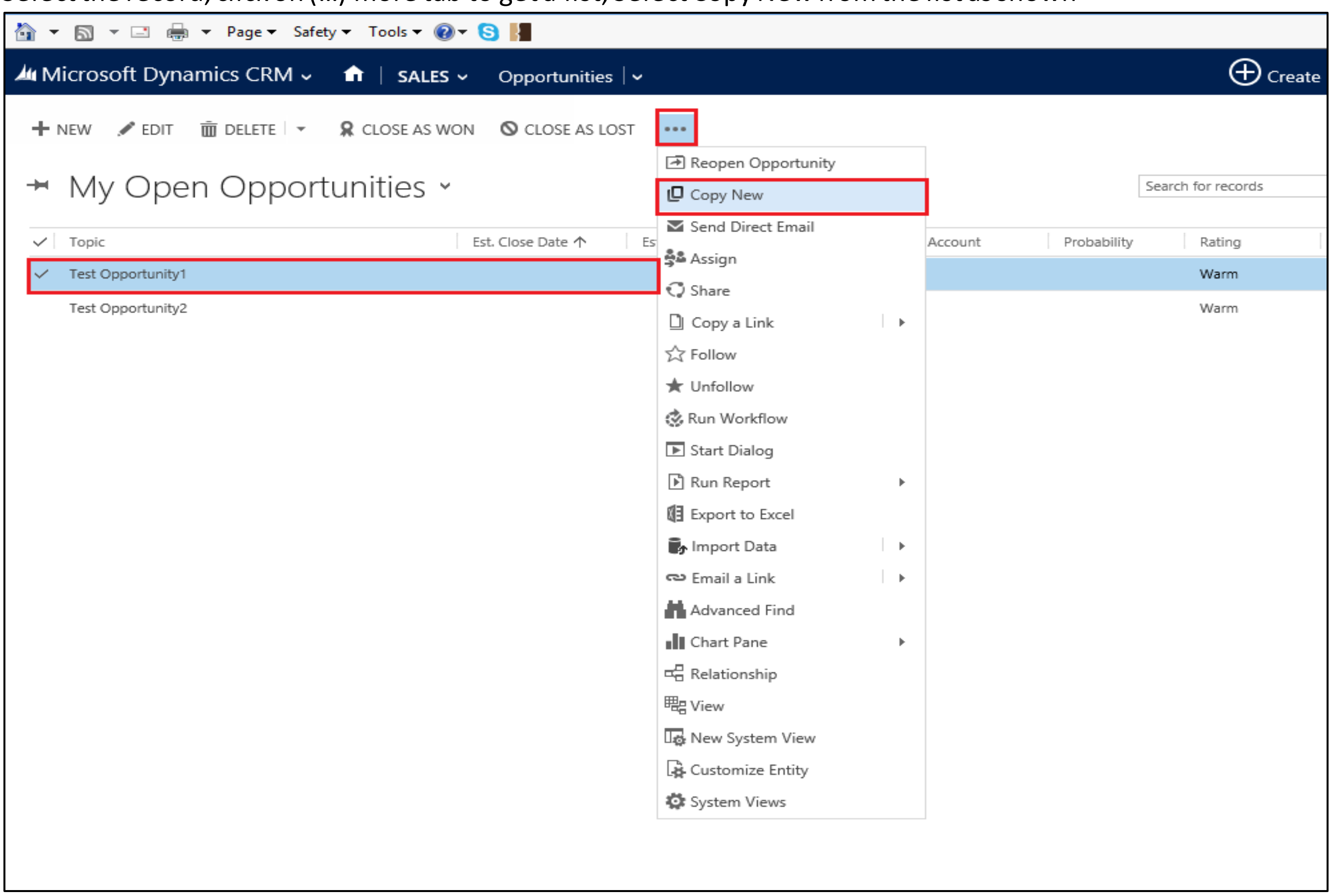



Figure 22: CRM screen showing Opportunities

- 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 Test Opportunity1_Copy is created.

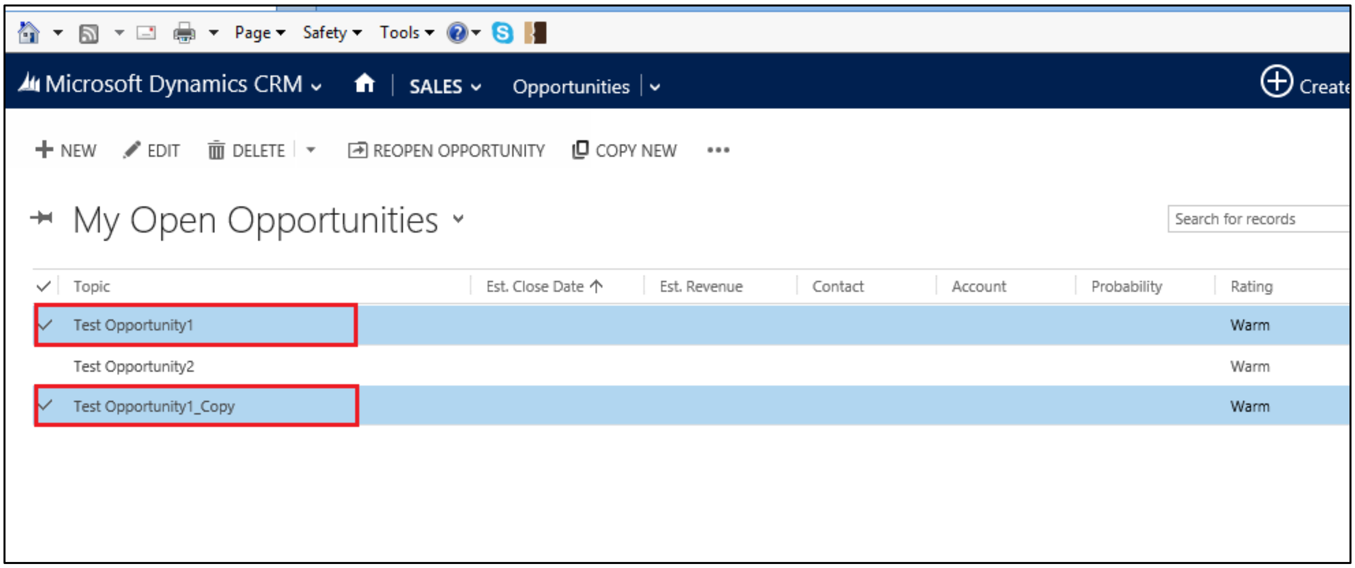



Figure 23: CRM showing new created record

- 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

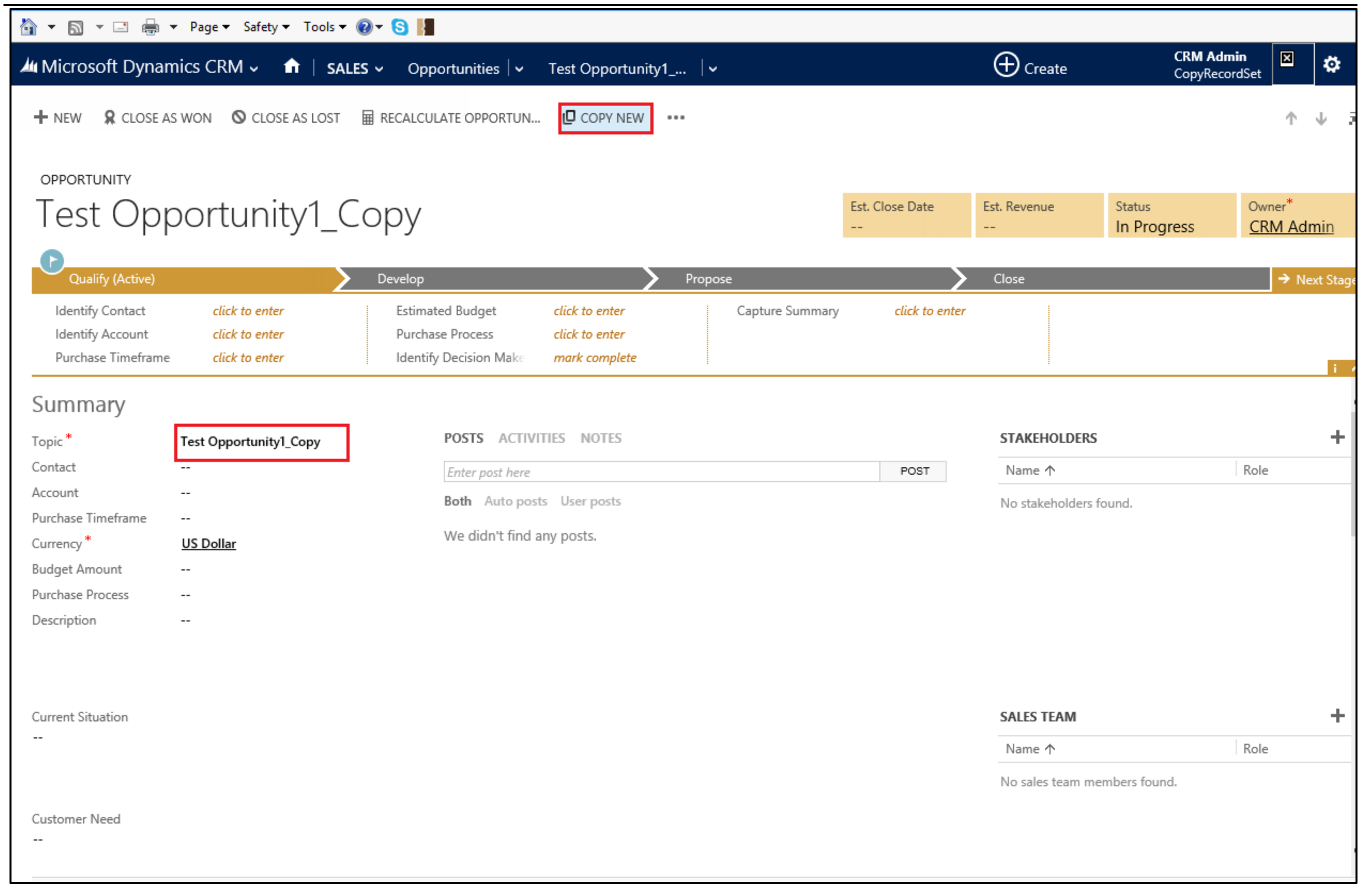



Figure 24: Opportunity form shown Copy New tab

## Delete a record.

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

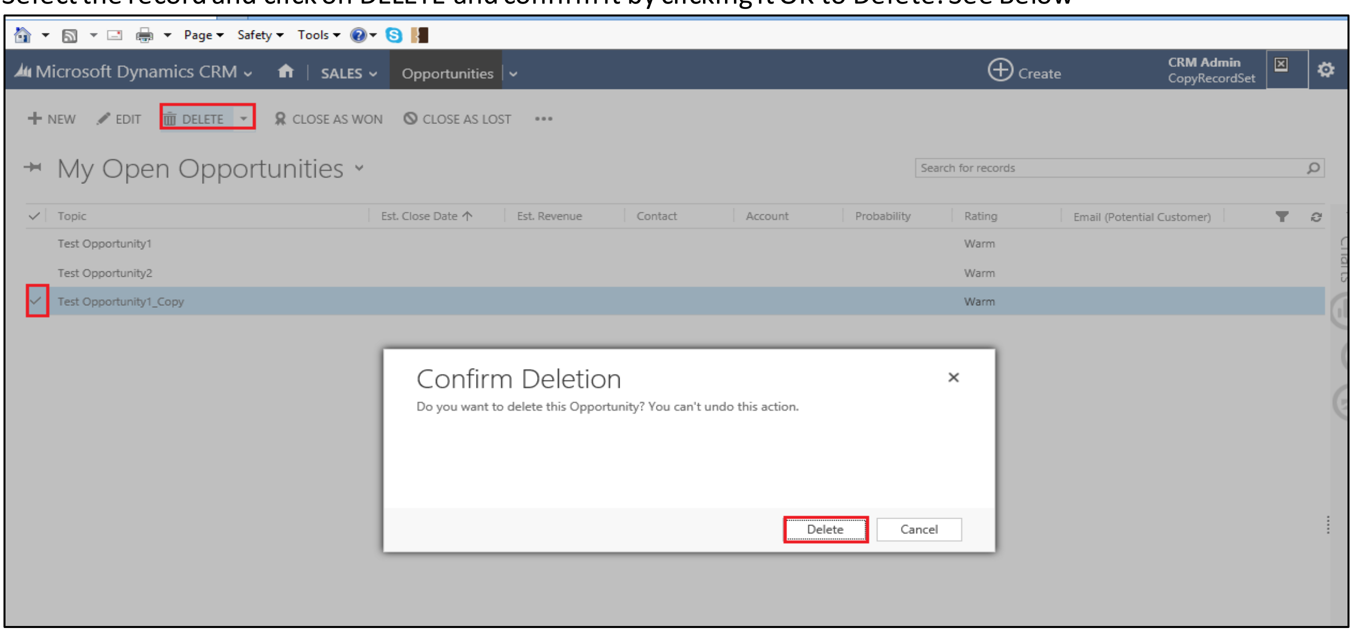



Figure 25: Delete a Record

# 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.

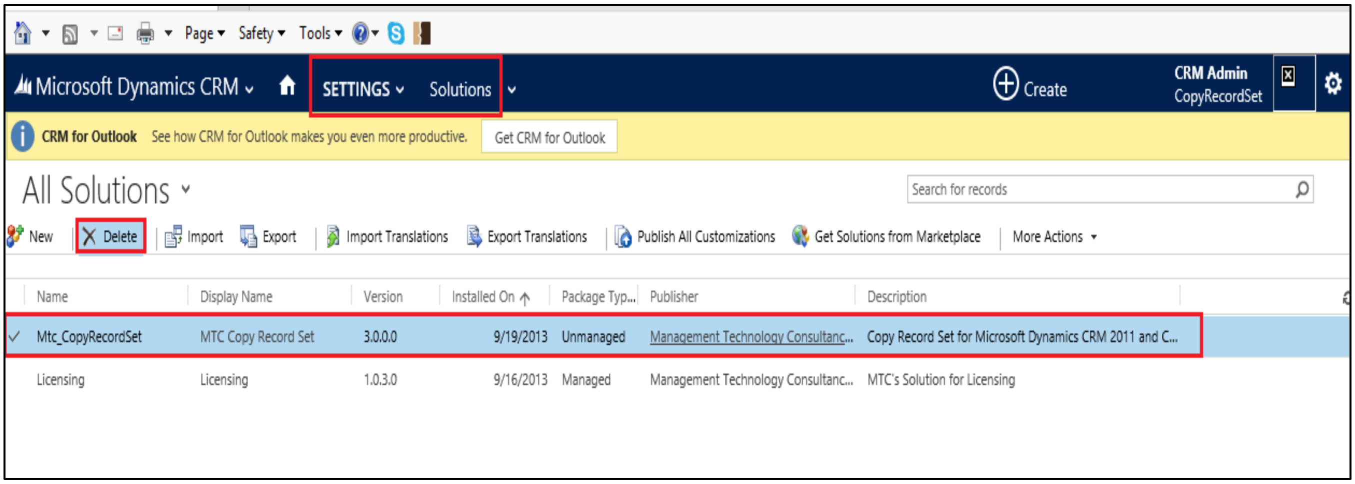



Figure 26 : Deleting Copy Record Set Solution

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

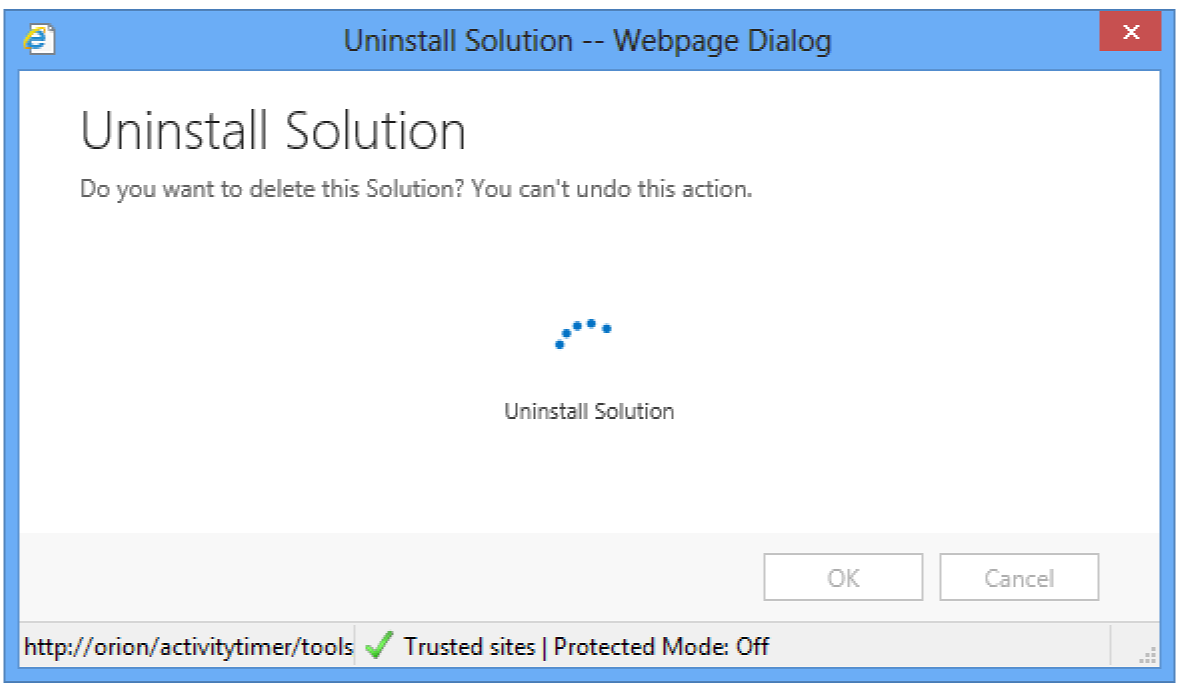



Figure 27 : Uninstall Solution

- 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 XRM 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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Important – Read Carefully. This MTC End-User License Agreement (“**Agreement**”) is a legal agreement between you (on the one hand) and Management Technology Consulting, LLC (**MTC**) and its OEM partner(s). (“**OEM**”) (On the other hand), for the CRM Managed Solution software product identified within (the “**Product**”), which includes computer software and may include printed materials, and online or electronic documentation. By installing, copying, other otherwise using this Product, you agree to be bound by the terms of this Agreement. If you, the End-User, do not agree to the terms of this Agreement, do not install or use this Product.

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8. All UPDATES provided by MTC and its affiliates shall be considered part of the Product and subject to the terms and conditions of this Agreement. Additional license terms may accompany UPDATES. By installing, copying, or otherwise using any UPDATE, End-User agrees to be bound by this Agreement and any terms accompanying each such UPDATE. If End-User does not agree to the additional license terms accompanying such UPDATES, do not install, copy, or otherwise use such UPDATES.
9. End-User agrees that MTC and its affiliates may collect and use technical information End-User provide as a part of support services related to the Product.

10. End-User acknowledges that the Microsoft CRM Managed Solution "Product" is of U.S. origin and agrees to comply with all applicable international and national laws that apply to the Product, including the U.S. Export Administration Regulations, as well as end-user, end-use and destination restrictions issued by U.S. and other governments.
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## F. Customer Care details

MTC is always open to global community of Microsoft Dynamics CRM platform Software Users

**Availability and hours of operation: Monday to Friday**
**USA PST 323-851-5008 - 8:00 AM to 6:00 PM**
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