



Microsoft Dynamics CRM / XRM Platform



User Guide



CRM Versions Supported : CRM 2011 and CRM Online

Copy Record Set is Product Transaction Editor for Microsoft Dynamics CRM 2011 and CRM Online. As the one-page quote process that works from opportunity to quote, to order, to invoice. An Excel-like record adding grid saves time and clicks.

Coding Version : 1.0

Document Version 1.0

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Table of Contents

Product Overview.....	3
Key Benefits:.....	3
System Requirement.....	3
Microsoft Dynamics CRM Web Software Requirements	4
Microsoft Dynamics CRM Web Client Requirements	4
License Key	5
Online Installation for free trial.....	5
Primus Installation for Copy Record Set	8
Creating Quote.....	9
Copy Quote	11
Copy Cases	12
MTC Overview.....	12
The Global CRM Community DynamicsExchange.com	13
End User License Agreement (EULA)	14
Warranty Disclaimer	15
Limitation of Liability.....	15
Annual Maintenance and Support	16
Customer Care details.....	16

List of Figures

Figure No 1. Customization Window.....	5
Figure No 2. Unique Name Window.....	5
Figure No 3. Download Window	5
Figure No 4. Setting Window.....	6
Figure No 5. Import Window	7
Figure No 6. Check Box Window.....	7
Figure No 7. Solution Window.....	8
Figure No 8. Licensing Window	8
Figure No 9. Sales Window.....	9
Figure No 10. Accounts Window	10
Figure No 11. New Quote	10
Figure No 12. Quote Window.....	10
Figure No 13. Copy New 1 st	11
Figure No 14. Copy New 2 nd	11
Figure No 15. Case Menu	12

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.
- Add and edit records faster than ever before for an instant gain in productivity!
- 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.

Q.O.I:- Quote Order Invoice

System Requirement

REQUIREMENT	RECOMMENDED
Microsoft Dynamics CRM	Version 2011 (Online or On-Premise)
Browser	Internet Explorer 6 or Internet Explorer 7 with the latest SP or Higher

***This solution should be imported to CRM 2011 Solutions.**

Microsoft Dynamics CRM Web Software Requirements

Microsoft CRM Server is accessed through a client. This client is either Microsoft Internet Explorer or Microsoft Office Outlook. If Outlook, the earliest version permitted is packaged with Microsoft Office 2003 (SP 3).

Microsoft Dynamics CRM Web Client Requirements

The following operating systems and Internet web browser versions are required:

MS Windows XP with latest SP or Windows Vista

MS Internet Explorer 6 or Internet Explorer 7 with the latest SP or Higher

License Key

To install Copy Record Set you will require License **Key**, which you can get by sending an E-mail request, with your Organization Unique Name. To access your Organization Unique Name Click on **Customization** from Setting pane and then click on **Developer Resources** as shown in Figure 1

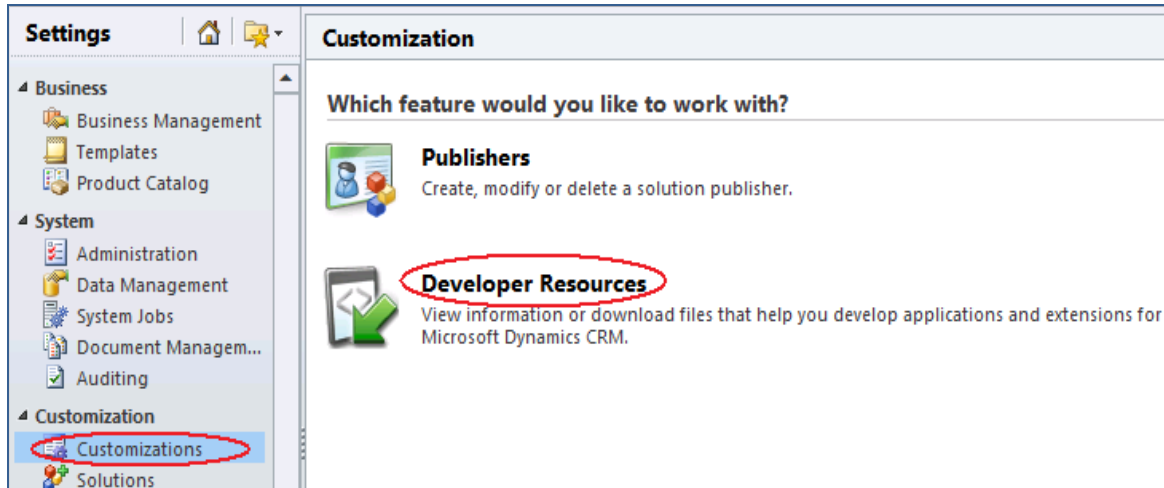


Figure No 1. Customization Window

New window appears with **Organization Unique Name** as shown in Figure 2. Send this Organization Unique Name thru email and you will receive your Licensing **Key** within 24 hours.

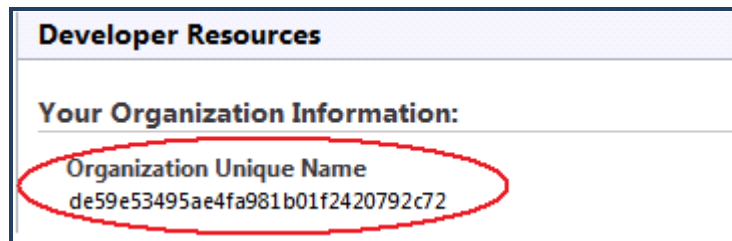


Figure No 2. Unique Name Window

Online Installation for free trial

Copy paste following web address on the browser <http://www.dynamicsexchange.com/cr.aspx> . Click on **Download Copy Record Set Trial** as shown in Figure 3.

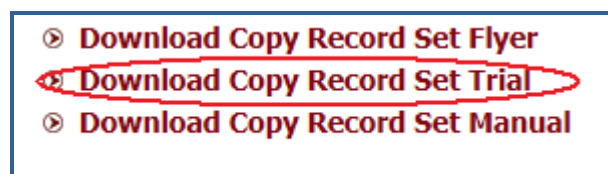


Figure No 3. Download Window

As you click on Download Trial, it opens a new window asking you permission to save the file, click on **Save**. It will save the file in **Downloads** folder. Open your online CRM click on simple to install Copy Record Set, click on **Settings**→**Solution**→ Browse the file from the location (Mtc_CopyRecordSet) and then click on **Import** as shown in Figure 4

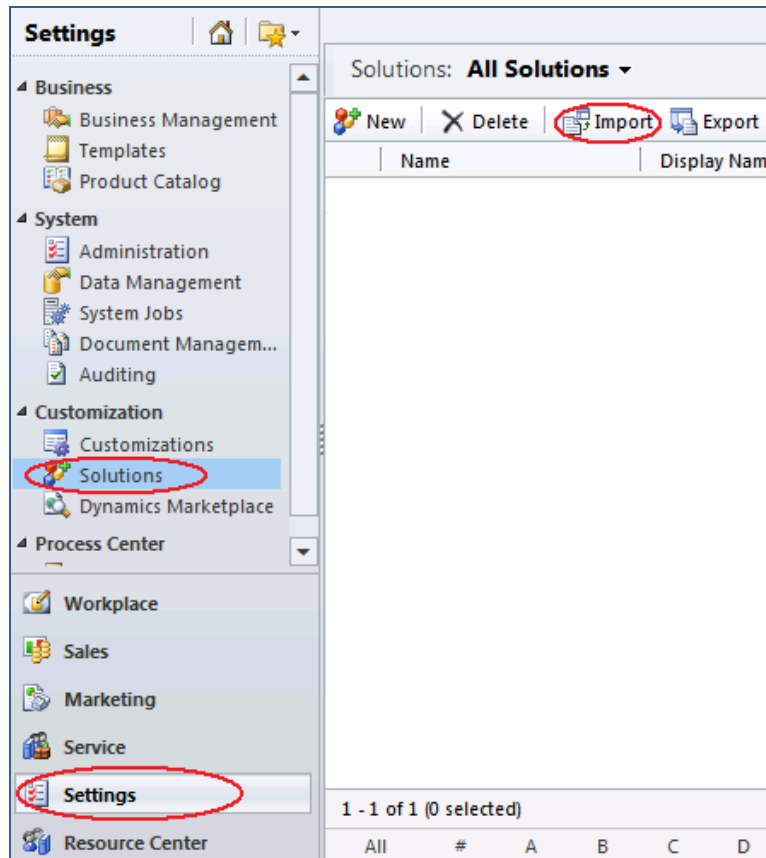


Figure No 4. Setting Window

It opens Import Solution Window where you can browse Mtc_CopyREcordSet file and then click on Next until finished as shown in below Figure

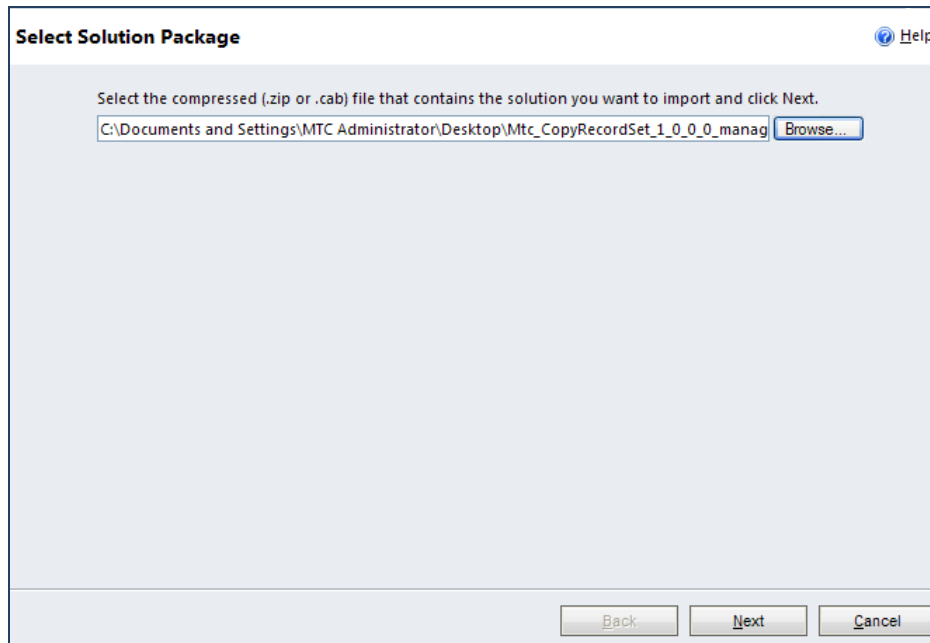


Figure No 5. Import Window

Select the Check Box which comes in between as “Activate any process and enable any SDK message processing steps included in the solution.” Press Next to continue as shown in Figure 6

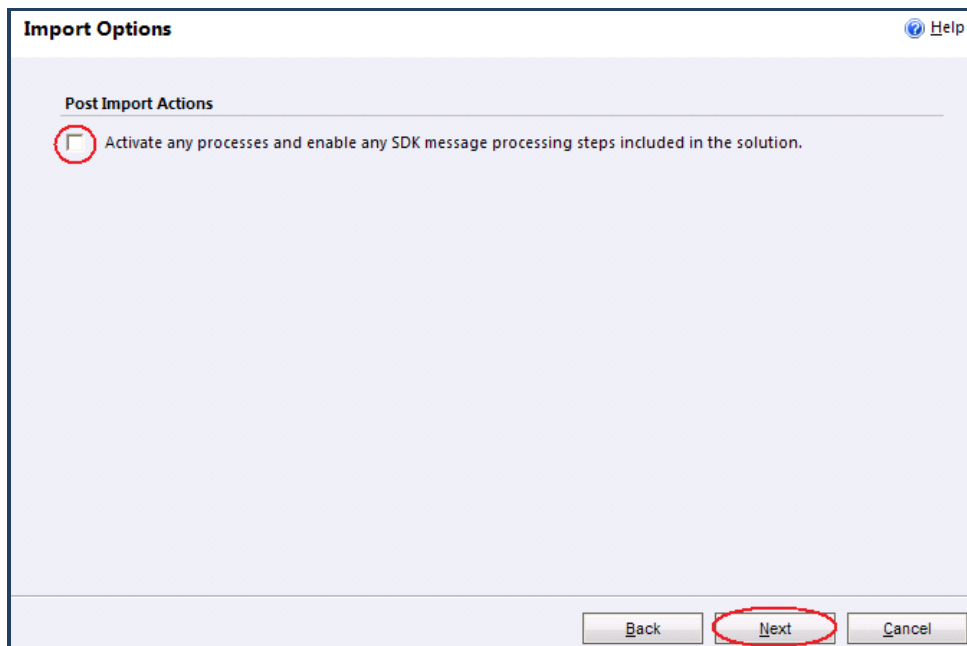


Figure No 6. Check Box Window

As soon as the download is completed it starts reflecting in CRM as shown in Figure 7

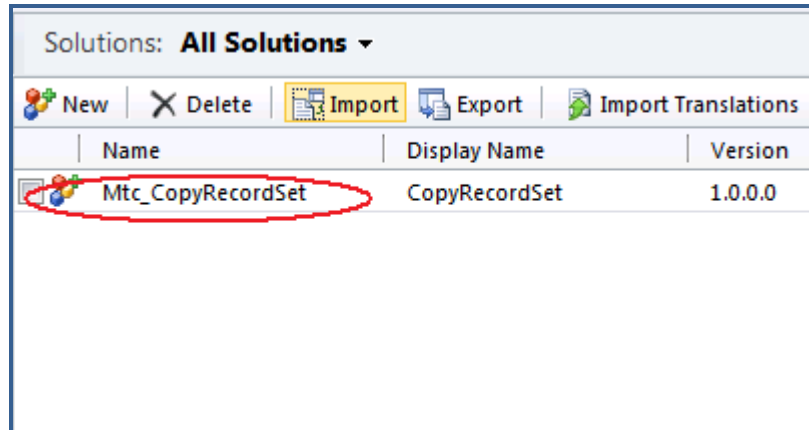


Figure No 7. Solution Window

Double Click on the **Mtc_CopyRecordSet** solution, it opens Licensing Window select **Mtc_CopyRecordSet** from drop down as shown in Figure 8, and enter license key which you have received thru email after placing a request for the same

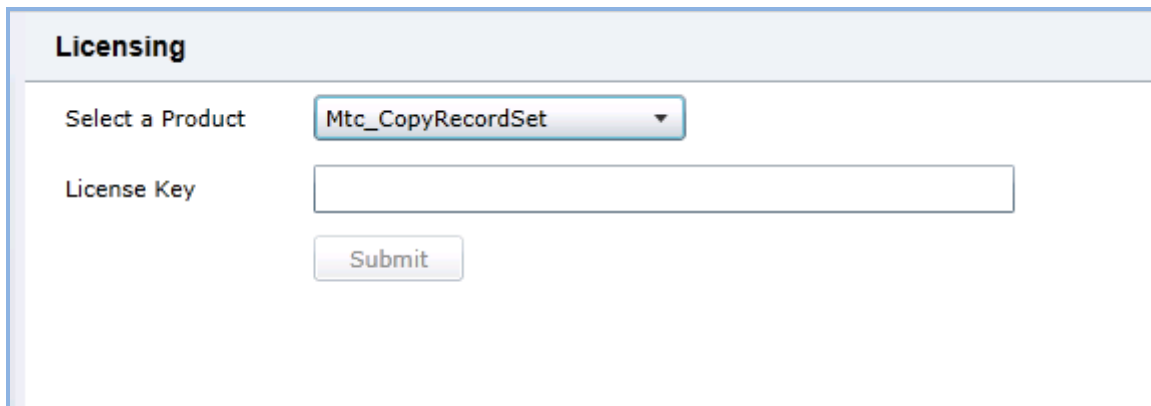


Figure No 8. Licensing Window

Note:- You will receive License key within 24 hours after placing the request thru e-mail.

Primus Installation for Copy Record Set

To install Copy Record Set on Primus, follow the same steps as for Online Installation, from Setting Window from Figure no 4.

Creating Quote

To create quote click on **Sales**→**Account** , in My Active window select any existing account, to Quote as shown in Figure 9

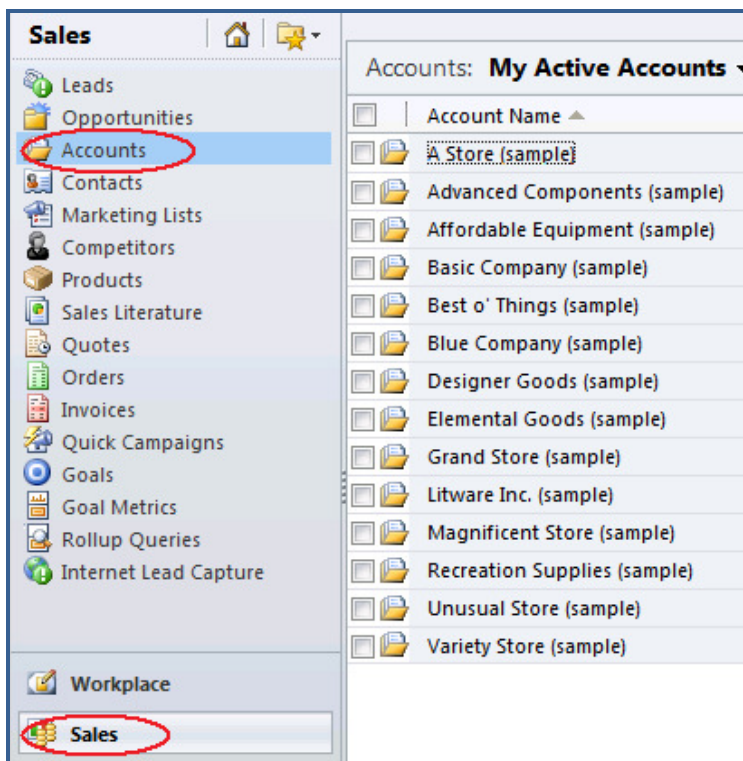


Figure No 9. Sales Window

New Window for **Accounts** opens up, click on **Quotes** as shown in Figure 10.

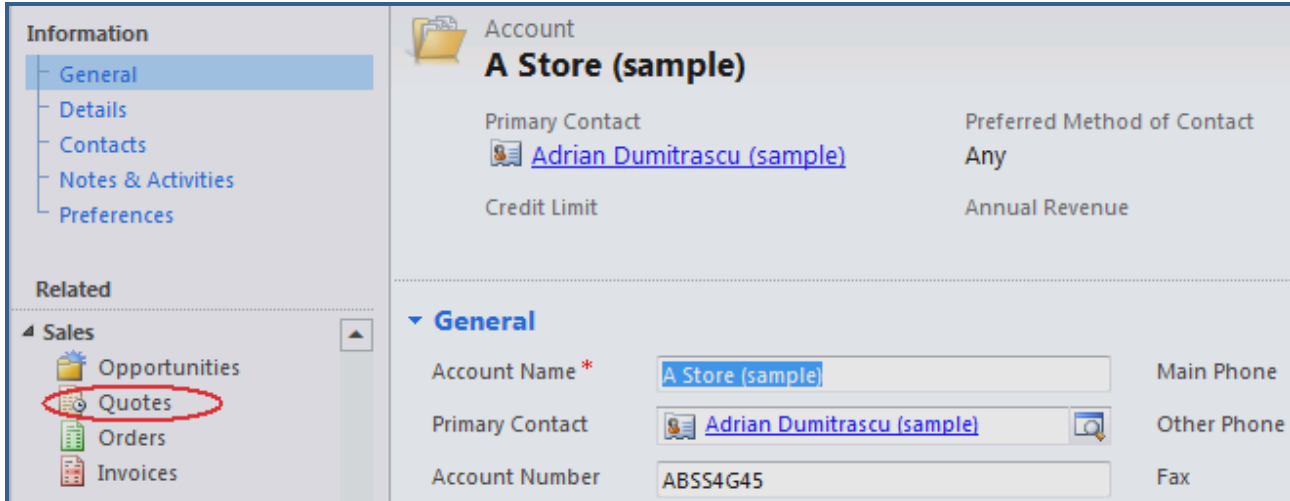


Figure No 10. Accounts Window

To create new Quote for the account click on **Add New Quote** as shown in Figure 11.

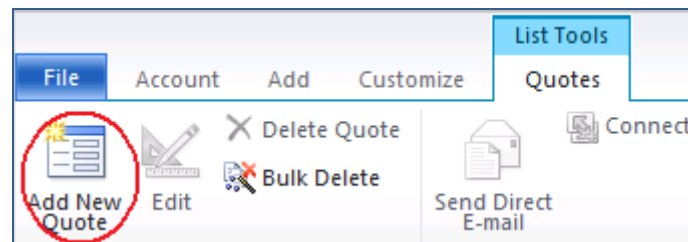


Figure No 11. New Quote

Quote window opens up with quote id, where you can click on existing quote to add and edit quote details like quantity, price, currency etc. as shown in Figure 12.

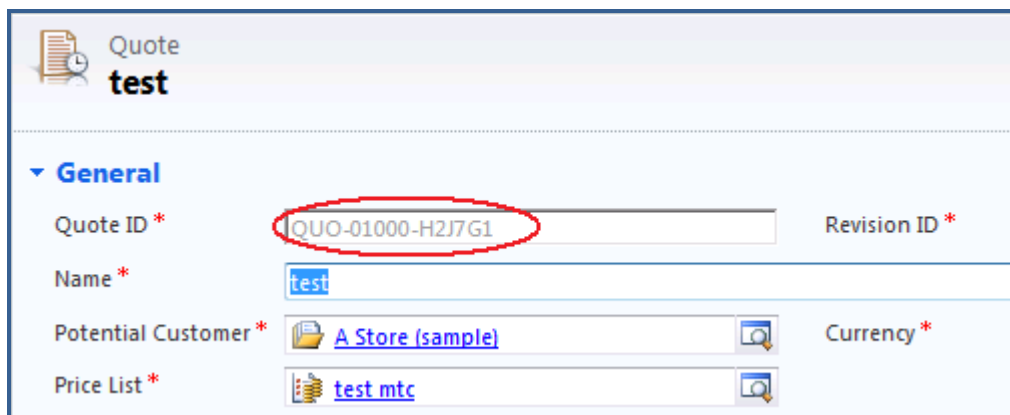


Figure No 12. Quote Window

Click on Save or Save & Close from upper ribbon after modifications.

Copy Quote

It allows you to re-use existing quote with a new Quote ID, (with same line items). There are two ways to Copy Quote 1st one ; In quote window click on **Copy New** from CRM Ribbon as shown in Figure 13

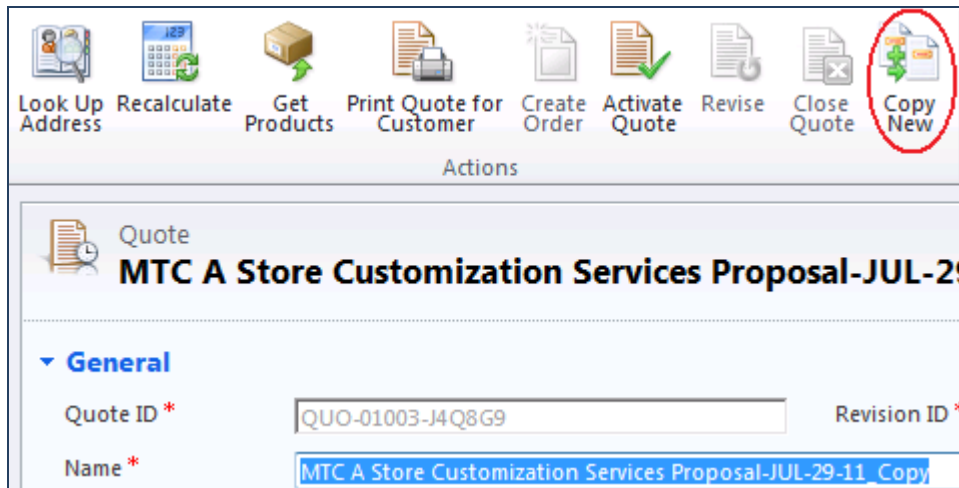


Figure No 13. Copy New 1st

2nd you can select Quote to be copied from the grid itself with the help of Check Box and click on **Copy New** as shown in Figure 14

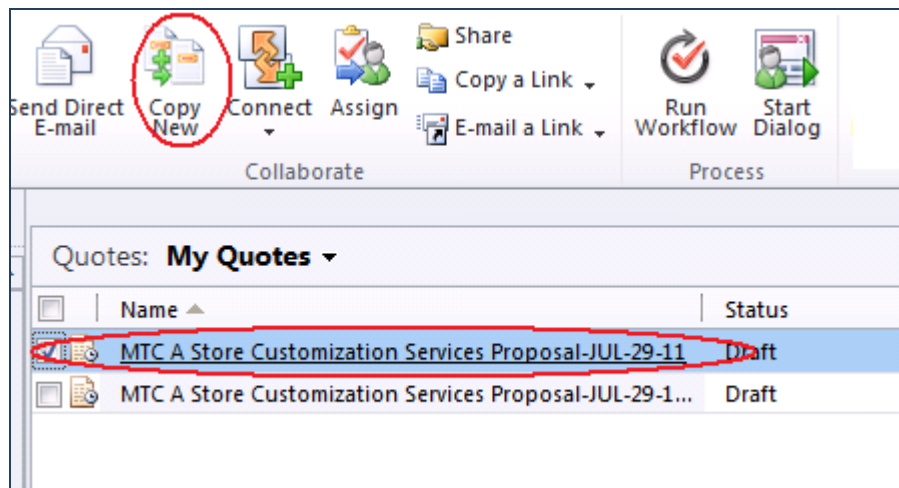


Figure No 14. Copy New 2nd

Copy Cases

Copy Record Set works similarly for **Cases** as well; all procedures are same as Quote, to open **Cases window** Click on **Services**→**Cases**, as shown in Figure 15

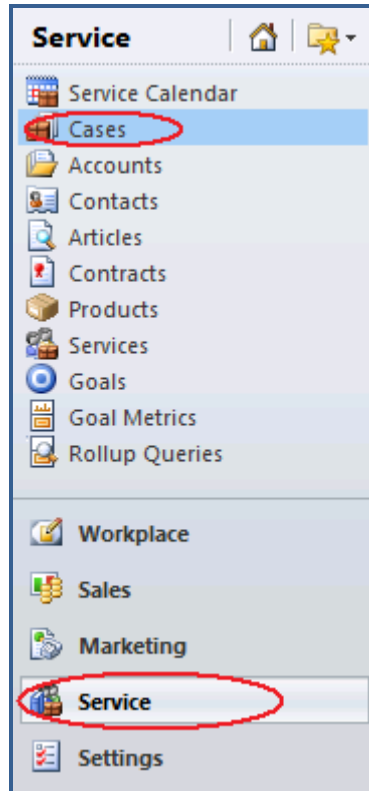


Figure No 15. Case Menu

Note: - In this manual we are using screen shots for Quote, it works similarly for below mentioned products as well:

- Invoice
- Order
- Opportunity
- Cases
- Quote product

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.



Small and medium sized businesses (SMB) can now affordably – cheaply – build the kind of enterprise automation system that distinguishes the best businesses on earth.

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 Enterprises solution set** visit: www.MTCCRM.com



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

MTC is a Microsoft Gold Certified Partner and 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 low-cost 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.

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MTC's low-cost and fixed-rate professional services current rate schedule: www.MTCCRM.com/MTC_Services.pdf

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<http://www.mtccrm.com>