

# Quote Mass Clone

## Overview

In this section, you will find information on how to mass clone a quote / quote items in Salesforce.com.

Concerned profiles:

ALL

## Step By Step

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Open the quote related to and click on **Clone**

Show Feed

Quote Line Items (1) | Activity History (0) | Google Docs, Notes, & Attachments (0) | Approval History (0) | Open Activities (0) | Quote History (0)

Quote Detail

EditDeleteCloneSharingSubmit for ApprovalGenerate PDFSend Last Version

▼ Information

|                    |                                |                                 |                          |
|--------------------|--------------------------------|---------------------------------|--------------------------|
| Quote Name         | Q-0000000361                   | Owner                           | Franoise Coussy (Change) |
| Opportunity        | alca                           | Status                          | Draft                    |
| Quote Title        | alca                           | Comments for the Approval       |                          |
| Visibility         | GBU Restricted                 | Currency                        | EUR                      |
| GBU                | Soda Ash & Derivatives         | Customer Service Representative | Anne Gilles              |
| BU                 | Soda Ash                       | Back Up                         |                          |
| Expiration date    | 30/11/2016                     |                                 |                          |
| Legal Quote Header | my Specific legal quote header |                                 |                          |

▼ Other quote information

|                       |                               |                   |                   |
|-----------------------|-------------------------------|-------------------|-------------------|
| Specific Requirements | My specific requirements :... | Template          | Tabular Landscape |
| Specific conditions   | My specific conditions:...    | Template Language | English           |
| Description           | Donec ligula lacus...         | General Lead time |                   |

The lines are cloned automatically  
That's handy !

Julio could also clone an opportunity and on the cloned opportunity he has the possibility to choose which quotes to clone (related to this opportunity). He opens the cloned opportunity, he clicks on the new button :

Opportunity

Opps Cloned

Customize Page | Edit Layout | Printable View | Help for this Page

Show Feed

Click to add topics:

Back to List: Custom Object Definitions

Cases | Competitive Insights | Cross BU Leads | Involved Accounts | Involved Contacts | Opportunity Team | Products (Solu) | Visit Report Links | Quotes | Open Activities | Activity History | Stage History | Opportunity Field History | Google Docs, Notes, & Attachments

Opportunity Detail

Edit | Delete | Sharing | Add Products & Forecast | Create quote | Update Forecast | Clone Opportunity

Get quotes from initial Opp

Status

1 - Quality | 2 - Lab Testing | 3 - Industrial testing | 4 - Negotiate | 5 - Closed Lost | 5 - Closed Won

Note

Opportunity Information

Opportunity Owner: Julien Andreoli | Change | Stage: 1 - Quality

Opportunity Name: Opps Cloned | Stage Reason

Julio chooses which quotes to clone with the checkbox "Include" and clicks on the Clone button

|                                                                                                                                                                                                              |               |          |                             |                 |                     |                   |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|----------|-----------------------------|-----------------|---------------------|-------------------|
| Home   Need Help   Chatter   Accounts   Contacts   Activities   Visit Reports   Account Plans   Cases   Opportunities   Cross BU Leads   Analytics   Reports   Dashboards   Updated CR   Adjusted CR   +   ▾ |               |          |                             |                 |                     |                   |
| Actual Opportunity<br>Opportunity cloned                                                                                                                                                                     |               |          | Original Opportunity<br>Opp |                 |                     |                   |
| Select quotes to clone from (new) (1)                                                                                                                                                                        |               |          |                             |                 |                     |                   |
| Include                                                                                                                                                                                                      | Quote Name    | Status   | Created Date                | Expiration date | Price Validity from | Price Validity to |
| <input type="checkbox"/>                                                                                                                                                                                     | Q-00000000371 | Rejected | 25/08/2016 11:52            | 25/08/2016      | 25/08/2016          | 25/08/2016        |
| <input checked="" type="checkbox"/>                                                                                                                                                                          | Q-00000000379 | Draft    | 31/08/2016 12:43            | 25/08/2016      | 25/08/2016          | 25/08/2016        |
| <input checked="" type="checkbox"/>                                                                                                                                                                          | Q-00000000380 | Accepted | 31/08/2016 12:44            | 25/08/2016      | 25/08/2016          | 25/08/2016        |
| Close   Cancel                                                                                                                                                                                               |               |          |                             |                 |                     |                   |

All quotes chosen by Julio are cloned on the new opportunity

Opportunity

Opps Cloned

Customize Page | Edit Layout | Printable View | Help

Show Feed

Click to add topics:

Back to List: Custom Object Definitions

Cases | Competitive Insights | Cross BU Leads | Involved Accounts | Involved Contacts | Opportunity Team | Products (Sohay) | Visit Report Links | Open Activities | Activity History | Stage History | Opportunity Field History | Google Docs, Notes & Attachments

Opportunity Detail

Edit | Delete | Sharing | Add Products & Forecast | Create quote | Update Forecast | Clone Opportunity

Get quotes from initial Opp

Status

1 - Quality | 2 - Lab Testing | 3 - Industrial testing | 4 - Negotiate | 5 - Closed Lost | 5 - Closes

Note

Opportunity Information

Opportunity Owner

Julien Andreoli (Change)

Stage

1 - Quality

Opportunity Name

Opps Cloned

Stage Reason

Opportunity Convention Name

TEST HC R-2606\_Novecare\_ARCHITECTURAL COATING\_2017-02-15

Reason Level 2

Account Name

TEST HC R-2606

Expected Yearly Revenues

EUR 856 587,34

GBU

Novecare

Probability (%)

20 %

BU

Amc

Close Date

11/01/2017

Visibility

Shared

Dummy Product Exists

Canibalization ?

Quotes

| Action                                     | Quote Name    | Status | Created Date | Expiration date | Price Validity from | Price Validity to |
|--------------------------------------------|---------------|--------|--------------|-----------------|---------------------|-------------------|
| <a href="#">Edit</a>   <a href="#">Del</a> | Q-00000000381 | Draft  | 31/08/2016   | 25/08/2016      | 25/08/2016          | 25/08/2016        |
| <a href="#">Edit</a>   <a href="#">Del</a> | Q-00000000382 | Draft  | 31/08/2016   | 25/08/2016      | 25/08/2016          | 25/08/2016        |

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Quote Line Item

QL-0000000057

[Back to List: Opportunities](#)

[Edit Lay](#)

Quote Line Item Detail

EditDeleteClone

Mass Clone

Quote

Q-0000000024

GBU

Novecare

Product

Comments

Other Product name

Manufacturing plant

M.O.Q.

0,00

Shipping plant

Packaging

▼ Details

Price per UoM

EUR 500,00

Ship to

Unit of Measure

Kg

Incoterm

Currency

EUR

Location

Cost per UoM

Lead time

Volume from

2,00

Freight cost

Volume to

Other shipping conditions

Specific discount

2

He arrives to the cloning edit page.

Selection

Select Clone Number : 1 Display Clones

Cancel

Actions

| Product                                                                                                                                                                 | Sales unit | Volume From | Volume to | Unit of Measure | Ship to | Lead time | Packaging | Currency |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|-------------|-----------|-----------------|---------|-----------|-----------|----------|
| Copyright © 2000-2015 salesforce.com, inc. All rights reserved.   <a href="#">Privacy Statement</a>   <a href="#">Security Statement</a>   <a href="#">Terms of Use</a> |            |             |           |                 |         |           |           |          |

Save

He will then have to choose the number of clones needed and click on **Display clones**

3

All the clones will appear in a table and the Julio can then update information before saving

Selection

Select Clone Number : 7 Display Clones

Cancel

Actions

| Product    | Sales unit Price | Volume From | Volume to | Unit of Measure | Ship to      | Lead time | Packaging | Currency | Incoterm | Freight cost | Comments |
|------------|------------------|-------------|-----------|-----------------|--------------|-----------|-----------|----------|----------|--------------|----------|
| AGRHSPEC G | 100.00           | 12.31       | 234.23    | Kg              | VALEO SYSTEM | 2 weeks   | full pack | Euro     | DAT      | 11.00        |          |
| AGRHSPEC G | 100.00           | 12.31       | 234.23    | Kg              | VALEO SYSTEM | 2 weeks   | full pack | Euro     | DAT      | 11.00        |          |
| AGRHSPEC G | 100.00           | 12.31       | 234.23    | Kg              | VALEO SYSTEM | 2 weeks   | full pack | Euro     | DAT      | 11.00        |          |
| AGRHSPEC G | 100.00           | 12.31       | 234.23    | Kg              | VALEO SYSTEM | 2 weeks   | full pack | Euro     | DAT      | 11.00        |          |
| AGRHSPEC G | 100.00           | 12.31       | 234.23    | Kg              | VALEO SYSTEM | 2 weeks   | full pack | Euro     | DAT      | 11.00        |          |
| AGRHSPEC G | 100.00           | 12.31       | 234.23    | Kg              | VALEO SYSTEM | 2 weeks   | full pack | Euro     | DAT      | 11.00        |          |
| AGRHSPEC G | 100.00           | 12.31       | 234.23    | Kg              | VALEO SYSTEM | 2 weeks   | full pack | Euro     | DAT      | 11.00        |          |

Save

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## Related articles

- [Quote Creation](#)
- [Mass Update](#)
- [Quote Approval Process](#)

## Need help?

To request any support or if you have identified a bug or incident , please create a Freshdesk ticket using Solvia platform : <https://solvia.solvay.com/>

- [Quote Manual Sharing](#)
- [Quote communication](#)
- [Quote Email Template creation](#)
- [Customer validation and Follow up](#)
- [Create a New Opportunity](#)
- [Clone an Existing Opportunity](#)
- [Definitions, Types of Opportunities & Process](#)

*you can copy users with email address , default priority is Low , then Submit . We advise you to put keywords in subject to ease dispatching to correct Agent : CRM - Complaint for example*