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:

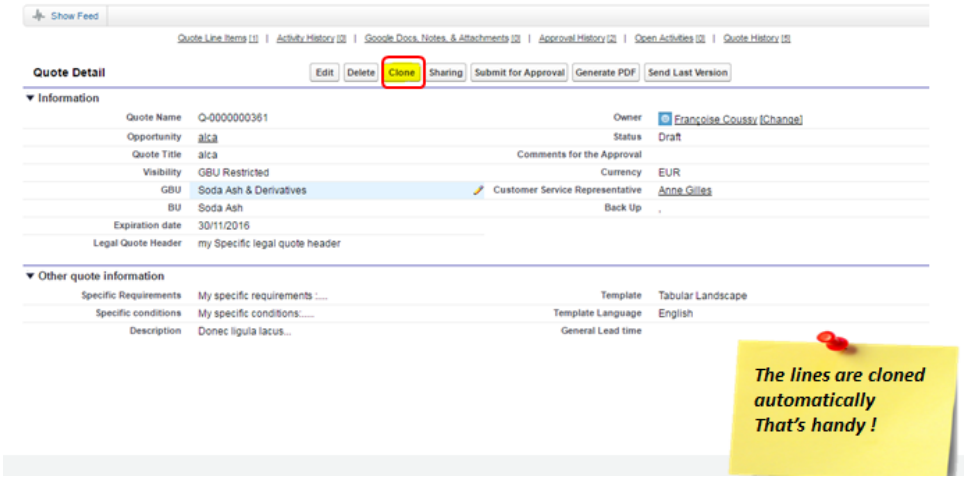
ALL

Table of content

- Step By Step
- Related articles
- Need help?

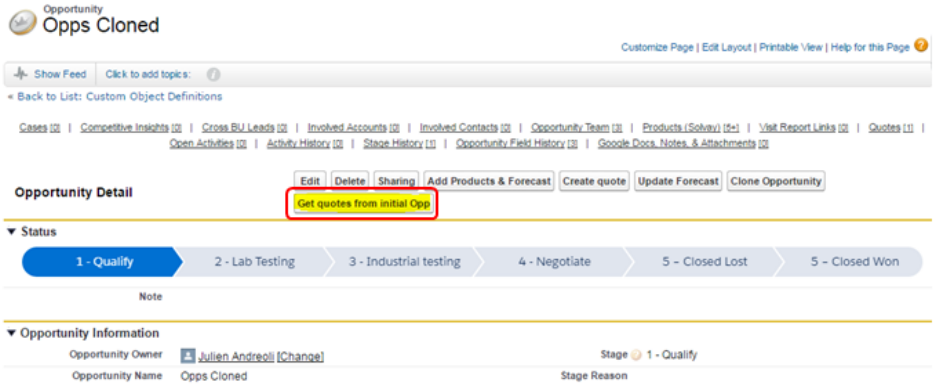
Step By Step

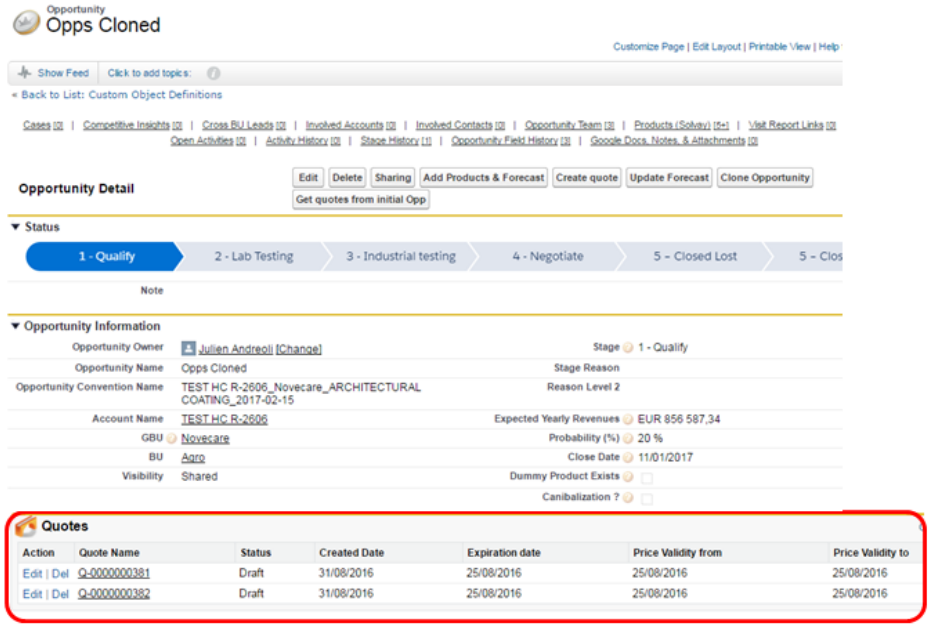
Open the quote related to and click on **Clone**



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).

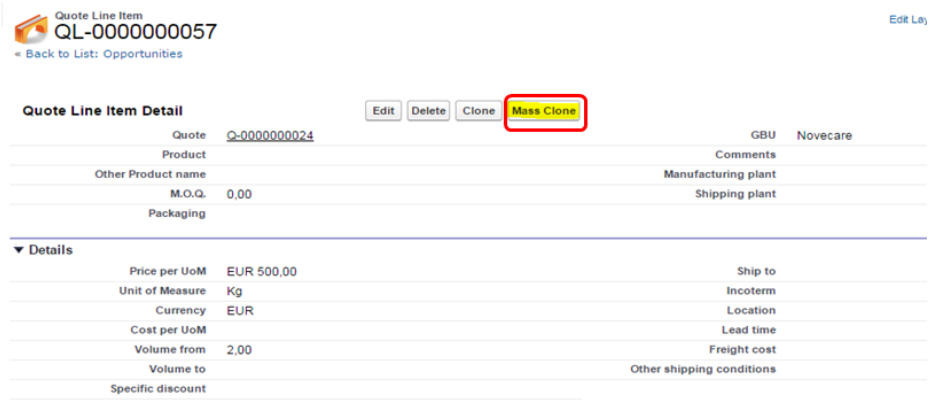
He opens the cloned opportunity, he clicks on the new button:



Julio chooses which quotes to clone with the checkbox “Include” and clicks on the **Clone** button	
All quotes chosen by Julio are cloned on the new opportunity	

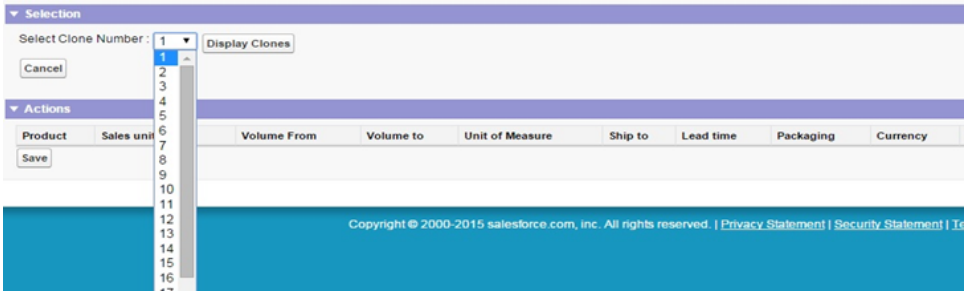
1

Julio creates one product line item and decides to mass clone it. Then he clicks on the mass clone button to avoid creating lines one by one.



2

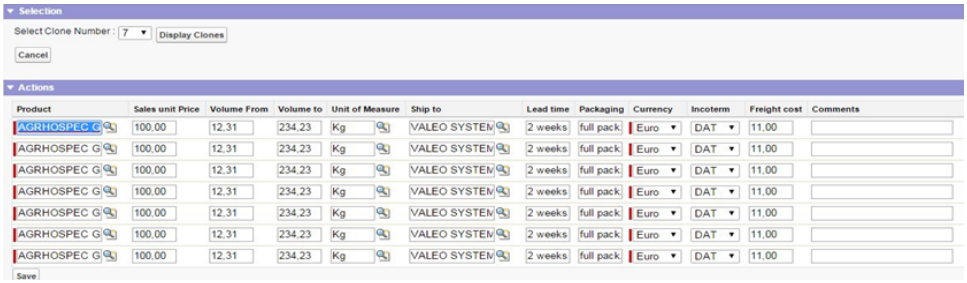
He arrives to the cloning edit page.



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



Back to the top

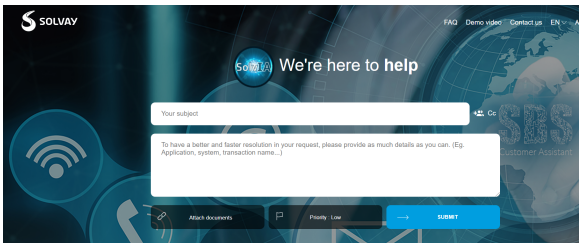
Related articles

- 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