

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	Françoise 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						
Opportunity cloned						
Select quotes to clone from [new] (1)						
Include	Quote Name	Status	Created Date	Expiration date	Price Validity from	Price Validity to
☐	Q-0000000381	Rejected	25/08/2016 11:52	25/08/2016	25/08/2016	25/08/2016
☐	Q-0000000379	Draft	31/08/2016 12:43	25/08/2016	25/08/2016	25/08/2016
☒	Q-0000000380	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 - Clos

Note

Opportunity Information

Opportunity Owner

Julien Andreoli (Change)

Stage

1 - Quality

Opportunity Name

Opps Cloned

Stage Reason

Reason Level 2

Opportunity Convention Name

TEST HC R-2606_Novecare_ARCHITECTURAL COATING_2017-02-15

Account Name

TEST HC R-2606

Expected Yearly Revenues

EUR 856 587,34

GBU

Novecare

Probability (%)

20 %

BU

Amo

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
Edit Del	Q-0000000381	Draft	31/08/2016	25/08/2016	25/08/2016	25/08/2016
Edit Del	Q-0000000382	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
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Save

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

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We're here to help

Your subject 150

To have a better and faster resolution in your request, please provide as much details as you can. (Eg. Application, system, transaction name,...)

Attach documents

Priority: Low

SUBMIT

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