

Quote Mass Clone

Overview

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

Table of content

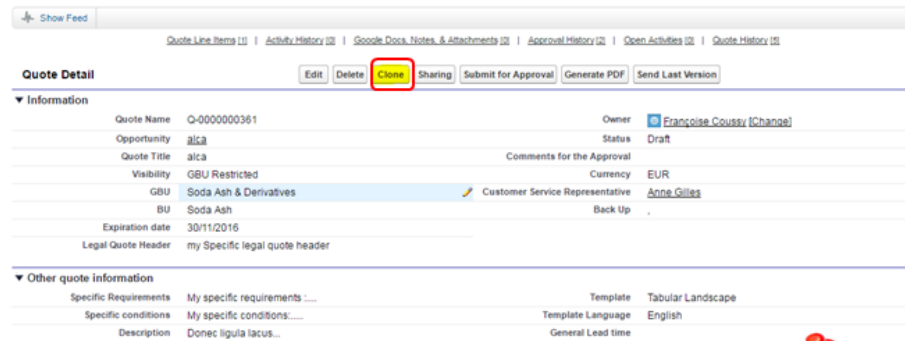
- [Step By Step](#)
- [Related articles](#)
- [Need help?](#)

Concerned profiles:

ALL

Step By Step

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



The screenshot shows the Salesforce Quote Detail page. At the top, there is a navigation bar with a 'Show Feed' button and several tabs: 'Quote Line Items (1)', 'Activity History (0)', 'Google Docs, Notes, & Attachments (0)', 'Approval History (0)', 'Open Activities (0)', and 'Quote History (0)'. Below the navigation bar, the 'Quote Detail' section has a row of buttons: 'Edit', 'Delete', 'Clone', 'Sharing', 'Submit for Approval', 'Generate PDF', and 'Send Last Version'. The 'Clone' button is highlighted with a red box. Below the buttons, there are two sections: 'Information' and 'Other quote information'. The 'Information' section contains fields for Quote Name (Q-0000000361), Opportunity (alca), Quote Title (alca), Visibility (GBU Restricted), GBU (Soda Ash & Derivatives), IBU (Soda Ash), Expiration date (30/11/2016), Legal Quote Header (my Specific legal quote header), Owner (Françoise Coussy), Status (Draft), Comments for the Approval, Currency (EUR), Customer Service Representative (Anne Gilles), and Back Up. The 'Other quote information' section contains fields for Specific Requirements (My specific requirements ...), Specific conditions (My specific conditions...), Description (Donec ligula iacus...), Template (Tabular Landscape), Template Language (English), and 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 :

The screenshot shows the Salesforce interface for an Opportunity record titled "Opps Cloned". At the top, there are navigation links: "Customize Page | Edit Layout | Printable View | Help for this Page". Below this is a "Show Feed" button and a "Click to add topics" dropdown. A "Back to List" link is also present. A horizontal menu contains various filters: "Cases", "Competitive Insights", "Cross-BU Leads", "Involved Accounts", "Involved Contacts", "Opportunity Team", "Products (Solu)", "Visit Report Links", and "Quotes".

The "Opportunity Detail" section includes a toolbar with buttons: "Edit", "Delete", "Sharing", "Add Products & Forecast", "Create quote", "Update Forecast", and "Clone Opportunity". A button labeled "Get quotes from initial Opp" is highlighted with a red box.

The "Status" section shows a progress bar with five stages: "1 - Quality" (active), "2 - Lab Testing", "3 - Industrial testing", "4 - Negotiate", "5 - Closed Lost", and "5 - Closed Won".

The "Opportunity Information" section displays:
Opportunity Owner: Julien Andreoli (Change)
Opportunity Name: Opps Cloned
Stage: 1 - Quality
Stage Reason: Stage Reason

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

Actual Opportunity	Original Opportunity																												
<p>Select quotes to clone from (new) (1)</p> <table border="1"> <thead> <tr> <th>Include</th> <th>Quote Name</th> <th>Status</th> <th>Created Date</th> <th>Expiration date</th> <th>Price Validity from</th> <th>Price Validity to</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>Q-0000000371</td> <td>Rejected</td> <td>25/08/2016 11:52</td> <td>25/08/2016</td> <td>25/08/2016</td> <td>25/08/2016</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Q-0000000379</td> <td>Draft</td> <td>31/08/2016 10:43</td> <td>25/08/2016</td> <td>25/08/2016</td> <td>25/08/2016</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Q-0000000380</td> <td>Accepted</td> <td>31/08/2016 10:44</td> <td>25/08/2016</td> <td>25/08/2016</td> <td>25/08/2016</td> </tr> </tbody> </table>		Include	Quote Name	Status	Created Date	Expiration date	Price Validity from	Price Validity to	<input type="checkbox"/>	Q-0000000371	Rejected	25/08/2016 11:52	25/08/2016	25/08/2016	25/08/2016	<input checked="" type="checkbox"/>	Q-0000000379	Draft	31/08/2016 10:43	25/08/2016	25/08/2016	25/08/2016	<input checked="" type="checkbox"/>	Q-0000000380	Accepted	31/08/2016 10:44	25/08/2016	25/08/2016	25/08/2016
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<input checked="" type="checkbox"/>	Q-0000000380	Accepted	31/08/2016 10:44	25/08/2016	25/08/2016	25/08/2016																							

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 (Soluvi) | 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 - Qualify 2 - Lab Testing 3 - Industrial testing 4 - Negotiate 5 - Closed Lost 5 - Closed

Note

Opportunity Information

Opportunity Owner: Julian Andreoli (Change) Stage: 1 - Qualify

Opportunity Name: Opps Cloned Stage Reason

Opportunity Convention Name: TEST HC R-2606_Novecare_ARCHITECTURAL Reason Level 2

Account Name: TEST HC R-2606 Expected Yearly Revenues: EUR 856 587,34

GBU: Novecare Probability (%): 20 %

BU: Amr 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

[Edit Lay](#)

[← Back to List: Opportunities](#)

Quote Line Item Detail

[Edit](#) [Delete](#) [Clone](#) [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

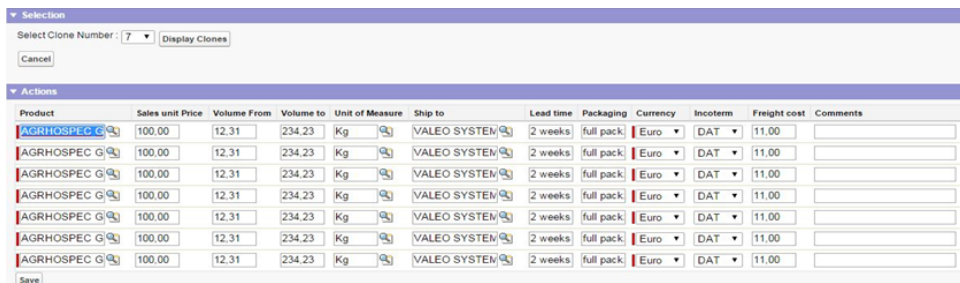
He arrives to the cloning edit page.



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](#)

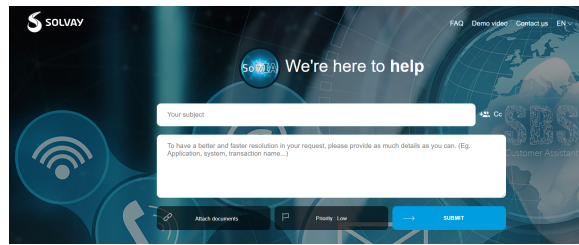
Related articles

- [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



The screenshot shows a web form for SOLWAY. At the top left is the SOLWAY logo. In the top right corner, there are links for 'FAQ', 'Demo video', 'Contact us', and 'EN'. The main heading is 'We're here to help'. Below this is a 'Your subject' input field. Underneath is a larger text area with a placeholder: 'To have a better and faster resolution in your request, please provide as much details as you can. (Eg. Application, system, transaction name...)'. At the bottom left of the form is an 'Attach documents' button with a paperclip icon. At the bottom right is a 'Priority: Low' dropdown menu and a blue 'SUBMIT' button.

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