

2. Clone Opportunity

When you clone an opportunity, the following things can happen:

1. Cloning Line Items:

- All products and details (line items) associated with the original opportunity are copied to the new one.

2. Cloning the Opportunity Team:

- The team members from the original opportunity are copied to the new opportunity.
- If a team member's role is "Account Manager," their access level is set to "Edit" in the new opportunity, and they are updated to the current user.

3. Cloning Quotes:

- Any quotes related to the original opportunity are duplicated and linked to the new opportunity.

4. Custom Rules:

- If line item does not have a corresponding price book entry record, it will not get cloned,
- The cloning process for the opportunity involves resetting and updating some fields. Here's what gets cleared or modified:

Field	Description
Competition Known	Cleared
Lost/Won Review	Cleared
Stage	Updated to a "Opportunity identification 0%"
Cloned From	Set to the original opportunity's ID
Opportunity Lost Reason	Cleared
Reason Level 2	Cleared
Targeted First Delivery Date	Updated if it's in the past to today's date
Close Date	Updated if it's in the past to today's date

