AGIC Group
CRM smart apps
AGIC Copy365
Agenda

Index

Introduction

AGICCopy365
Introduction

This product aims at providing a very useful and configurable copy functionality for Dynamics 365 Customer Engagement.

Simple installation and configuration – a truly "Start & Go" application.
Goals

✓ Provide a tool that allows to copy selected and related record/s.

✓ Define the product related permissions through CRM roles.

✓ Provide a copy function configuration tool.

✓ Give the possibility of copied records identification.
## Agic Copy 365 Data Model

**Entity** => AgicCopy365Configurator

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Type</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entity logical name</td>
<td>String</td>
<td>Is the logical name of the entity</td>
</tr>
<tr>
<td>Entity display name</td>
<td>String</td>
<td>Is the display name of the entity</td>
</tr>
<tr>
<td>Primary attribute name</td>
<td>String</td>
<td>Logical name of the primary entity’s primary attribute</td>
</tr>
<tr>
<td>Attributes to copy</td>
<td>String</td>
<td>All attributes that will be copied in the new record.</td>
</tr>
<tr>
<td>Parent AgicCopy365 Configurator</td>
<td>Lookup</td>
<td>Is a lookup to the parent Agic Copy 365 Configurator</td>
</tr>
<tr>
<td>Parent Entity lookup field logical name</td>
<td>String</td>
<td>The logical name of the field that relates the newly configured entity with the corresponding entity of the selected Parent AgicCopy365 Configurator.</td>
</tr>
<tr>
<td>Enabled</td>
<td>Two Options</td>
<td>This Boolean field determines whether this configuration should be activated or not.</td>
</tr>
</tbody>
</table>
Security Roles

There are two roles defined for this product:

“AgicCopy365 Admin” and “AgicCopy365 User”
Agic Copy 365 Configurator

- Records created for each entity in which we want to enable the copy functionality

- One record contains all the information needed to copy the selected records of an entity.

- We decide which will be:
  - the fields to copy
  - the related entities (optional)
  - the relationship between the related entities
A select dropdown containing all the customizable entities.

The multiselect list of attributes will be updated with the respective attributes of the selected entity.
Parent Entity Lookup Field is a select element that shows a list of the display names of all lookup fields of child related to the parent entity. If two entities selected don't have any relationship, the field will be hidden, and user will be notified: “There is no Relationship between these Entities”.
Use Case: **Contact** (ParentEntity) – **Lead** (ChildEntity)
Agic Copy 365 Configurator

Fields created on the entities configurated:

- **agic_iscopy (boolean)**
  - is enabled to show that this record is a copy, by default “False”

- **agic_agiccopy365sourceid (lookup)**
  - lookup at the same entity that contains the reference of record from where has been fired the copy

- **agic_copyinitiatorrecord (string)**
  - Not empty, only when we are in a ChildEntity record
  - Takes as value the reference of the source (PrimaryEntity) of record where has been fired the copy
    
    Ex. « name= ‘PrimaryEntityName’ , Id= ‘PrimaryEntityId’ »
Agic Copy Button

The service offered by the product is to Create Copy/ies of the record/s using the button **AGIC COPY**.

The AGIC COPY button will appear only in the configured entities (via Agic Copy365 Configurator) and to the enabled users (those who have at least one of the two roles defined for the product).
The button Agic Copy appears in the “Form” and also in the “Home” of the configured entity.

The user can select more than one record to be copied by clicking the button.
CONCLUSIONS

➢ Dynamics 365 users come across several such situations where they need to copy record/s. It can be done manually but the whole process is time-consuming, and you will end up spending your productive time and efforts for copying Dynamics CRM record/s.

➢ One of the best ways to do that, is to use AGIC COPY 365 product. It improves the whole user experience and boosts productivity thereby saving time and efforts.