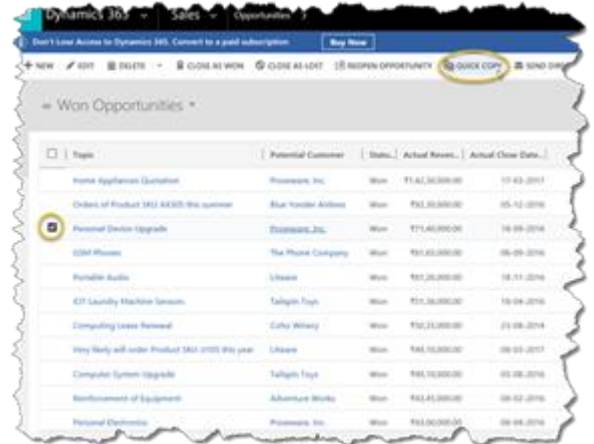




## 1-Pager – Quick Copy

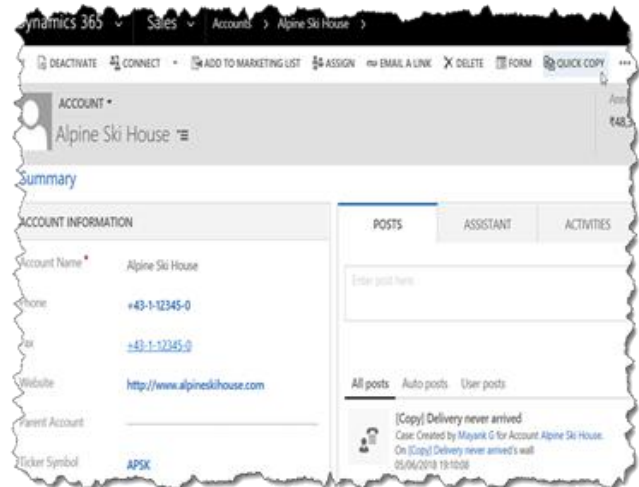
### Copy Opportunity Record (From Home Grid)

- Navigate to Opportunities view
- Select the opportunity that you wish to copy
- Click on “Quick Copy” button in command bar as shown
- The copied record will open up in a few seconds



### Copy Account Record (Form Entity Form)

- Open any account record that you wish to copy
- Click on “Quick Copy” button in command bar as shown
- The copied record will open up in a few seconds



### Configure Quick Copy Exclude Fields

- Navigate to Settings -> Quick Copy Exclude Fields Config
- Create a new record
- Enter the logical name of entity for which you need to configure exclude fields on Quick Copy
- Enter logical names of the fields you wish to exclude from the copy. The list should be comma separated
- Save the record. Now your exclude config is setup

