

Zap Objects: Zap Copy Record App



Copy / Clone records (with unlimited child records) in a single click or on SCHEDULE!

Works with: Dynamics 365 Sales, Customer Service, Field Service & Power Apps.



Features

- Easy Configuration
- Copy even child records (1..N, N..N)
- Copy Multiple Records
- Bulk Copy Single Record
- Deep Copy/Clone (Copy up to N levels)
- Exclude fields from COPIED record
- Set default values in COPIED record
- Can copy by using Power Automate Flow/ Workflow
- Schedule a COPY (e.g., Creating Recurring Opportunity / Case)
- Advanced CLONING functionality for Field Service – Work Orders

Feature Highlight #1: Copy a Record in 1-Click

The screenshot displays the Dynamics 365 Sales Hub interface. At the top, a banner reads "Copy/Clone Record in 1-Click - Zap Copy Record App". The left sidebar contains navigation options: Home, Recent, Pinned, My Work, Licenses, Sales accelerator, Activities, Dashboards, Calendar, Customers, Accounts, and Contacts. The main content area shows the "Opportunity Sales Process" with a progress bar indicating "Qualify (24 D)" and "Develop". Below this, a "Key details" section lists fields: Topic (Zap Notifications / ...), Type (App), Opportunity Number (01500), and Contact. A "Copy" button is highlighted in the top toolbar, with a yellow callout box stating "COPY / CLONE in 1-Click". Another yellow callout box points to the "Set Copy Recurrence" button, stating "Schedule COPY / CLONE". The bottom right section includes "Up next" and "Manage your activities" with buttons for "Connect sequence" and "Create activity".

Copy/Clone Record in 1-Click - Zap Copy Record App

Dynamics 365 | Sales Hub

Search

New look

← | | Save | **Copy** | **Set Copy Recurrence** | + New | Export to PDF | Collaborate | Close as won |

COPY / CLONE in 1-Click | Notifications / Alerts Generator | **Schedule COPY / CLONE**

Opportunity · Opportunity

Opportunity Sales Process
Active for 24 days

Qualify (24 D) | Develop |

Summary | Product line items | Quotes | Field Service | Files | Related

Key details

Topic * Zap Notifications / ...

Type App

Opportunity Number 01500

Contact

Up next

Manage your activities
See upcoming activities by connecting the opportunity to a sequence or by creating an activity. [Learn more](#)

Connect sequence | Create activity

Timeline

Feature Highlight #2: Copy Multiple Records in 1-Click

Copy/Clone Multiple Records in 1-Click - Zap Copy Record App

Dynamics 365

Sales Hub

Search Leads and more

Home

Recent

Pinned

My Work

Licenses

Sales accelerator

Activities

Dashboards

Calendar

←

Show Chart

Edit

Export Report

Copy

Qualify

Disqualify

Connect sequence

Delete

All Leads - Sample Data

COPY / CLONE multiple records in 1-Click

Name	Topic	Owner	Status R...	Created On
<input checked="" type="checkbox"/> allen wilson	O-nonbuyers	...	New	4/1/2019 6:59...
<input checked="" type="checkbox"/> amy wheeler	O-Leads	...	New	4/1/2019 6:59...
<input checked="" type="checkbox"/> andrew wenthe	O-Leads	...	New	4/1/2019 6:59...
<input type="checkbox"/> aurora wannamaker	O-nonbuyers	...	New	4/1/2019 6:59...
<input type="checkbox"/> antonio williams	O-nonbuyers	...	New	4/1/2019 6:59...

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Feature Highlight #3: BULK Copy single record

Copy/Clone Record in Bulk - Zap Copy Record App

Dynamics 365 | Sales Hub



Search Leads and more

New look

Home
Recent
Pinned
My Work
Licenses
Sales accelerator
Activities
Dashboards
Calendar
Customers
Accounts
Contacts

← Show Chart Edit Export Report **Copy** Qualify Disqualify Connect sequence Delete Merge

All Leads - Sample Data

	Name	Topic	Owner	Status R...	Created On	Email	Microso...
<input checked="" type="checkbox"/>	allen wilson	O-nonbuyers	 Sumeet...	New	4/1/2019 6:59...	wilsonab...	No
<input type="checkbox"/>	amy wheeler	O-Lea			6:59...	wheeler2...	No
<input type="checkbox"/>	andrew wenthe	O-Lea			6:59...	wenthea2...	No
<input type="checkbox"/>	aurora wannamaker	O-nor			6:59...	wannama...	No
<input type="checkbox"/>	antonio williams	O-nor			6:59...	w.tony18...	No
<input type="checkbox"/>	amand sartain	O-nor			6:59...	urhairsux...	No
<input type="checkbox"/>	allysa romo-evans	O-nonbuyers	 Sumeet ...	New	4/1/2019 6:59...	untiltwod...	No

Copy Record

Select Template: Lead

Number of Copies: 5

Create Cancel

Feature Highlight #4: Copy from one entity to another in 1-Click

Configuration Settings to Copy “Case” To “Opportunity”

Dynamics 365

Zap Copy Record

Search

Home

Recent

Pinned

Zap Copy Record

Zap CR Configuration

Zap CR Event Log

Zap License

Zap CR License

Zap Knowledge Base

Zap CR KB

Case - Opportunity - Saved

Zap CR Configuration

General Related

Step 1: Select Entity (& save the record before proceeding to Step 2)

Select Entity*

Copy To Another Entity Record

Target Entity

Case

☒

Opportunity

Step 2: Configure General Settings

Copy Prefix Field

Copy Prefix Text

Source Record Field (Optional)

Topic

Originating Case

Step 3: Entity Fields Mapping

Step 1: Select Entities:
Case
To
Opportunity

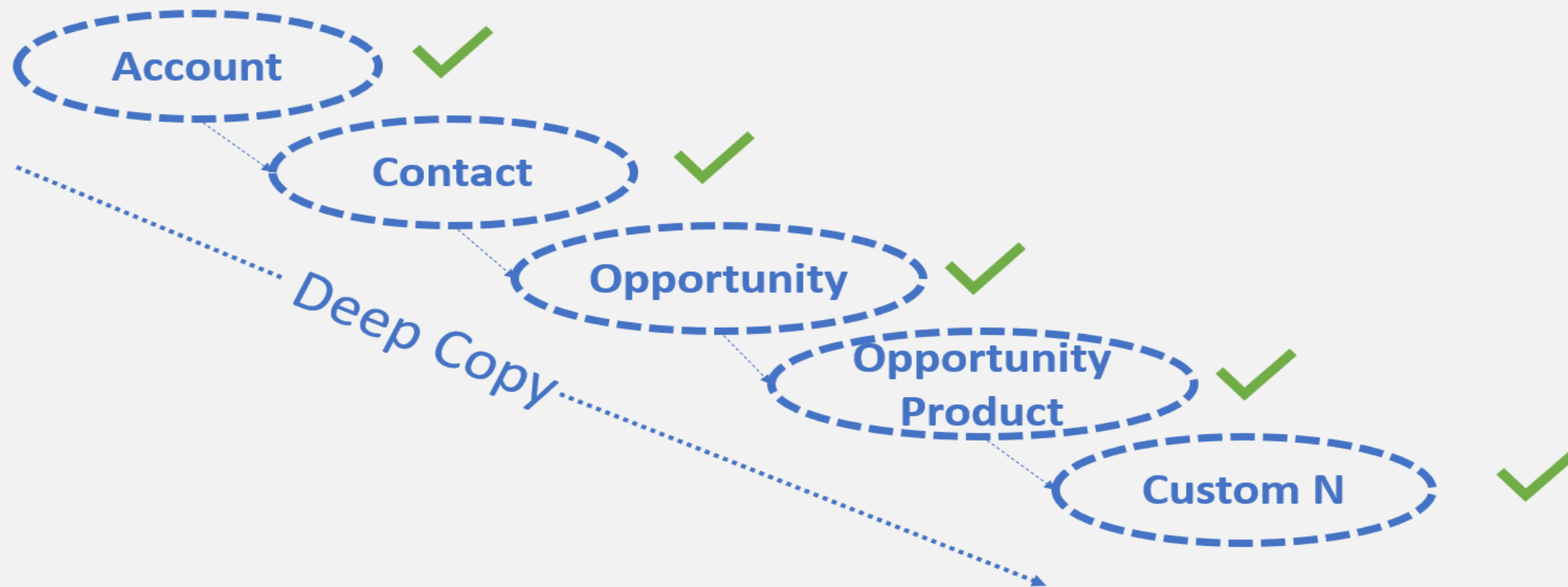
Step 2: Configure
Field Mappings
between the 2 entities

(e.g., Creating a Lead from Contact OR creating Opportunity from Case)

Feature Highlight #5: Deep COPY (copy parent – child – grandchild – great-grand child and so-on)

Zap Copy Record App – Deep Copy

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DYNAMICS 365 CRM APPS



Now Copy / Clone / Duplicate records up to **any** level of child records

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Feature Highlight #6: Advanced CLONING functionality for Field Service – Work Orders

Cloning Field Service – “Work Orders” in 1-Click using “Zap Copy Record App”



Easily configure which fields need to be excluded & what related records need to be cloned!

Feature Highlight #7: Scheduling a COPY (Recurring Maintenance Cases, Recurring Opportunities, etc.)

Schedule a Record to Copy/Clone - Zap Copy Record App

Dynamics 365 | Sales Hub

Read-only This record's status: Won

Set Copy Recurrence

[Renewal] Zap All-in-One App - Custom Opportunity - Opportunity

Opportunity Record

9/22/2023 Est. Close Date \$2,000.00 Est. Revenue

Opportunity - Monthly

Recurrence Settings – Record is set to be cloned every year (30 days before due-date)

Opportunity - Monthly - Saved

Zap CR Recurrence Master

9/20/2024 Next Run Date 10/20/2024 Due Date Sumeet Ballani Owner

General

Recurrence Type * Monthly

Start Date * 10/31/2023

End Date Type * No End Date

Calculate by Day of Month

Day of Month 20

Recur Every X (Days/Months) * 12

X Days before Due Date 30

Requirement: We just won an annual license contract! Can we have this opportunity be cloned automatically every year ...30 days before renewal date? – Sure, that's easy! Use "Zap Copy Record" App!

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Feature Highlight #8: Use Power Automate Flow or Workflow to COPY/CLONE

Copy/Clone Record Using Power Automate FLOW

Requirement: If “Opportunity Status = LOST” and “Follow-Up=YES” then wait for 3 months and CLONE this Opportunity...and then update the CLONED record!

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Getting Started

- Copy Record features page ([link](#))
- To request trial email sales@zapobjects.com with below details:
 - Company Name:
 - Contact Number:
 - Requirements: