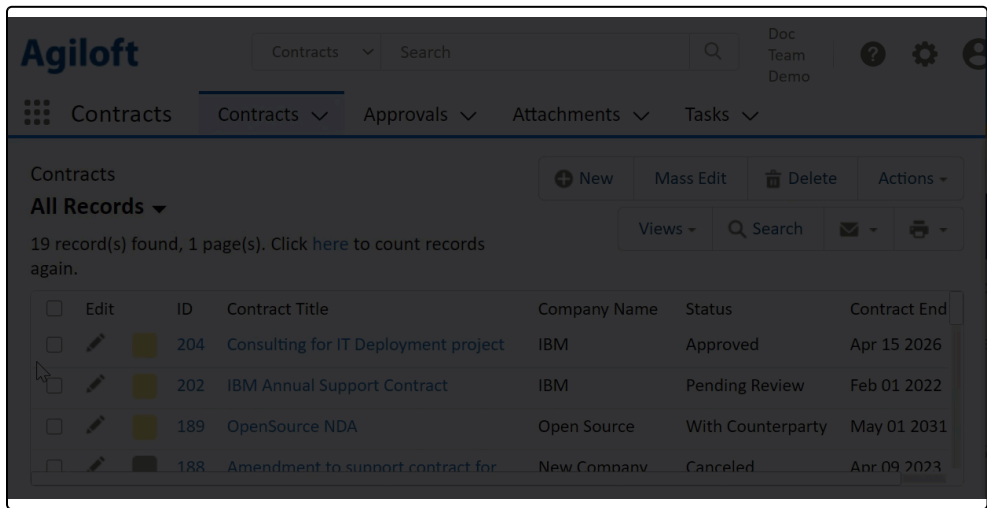


Copying Records

Copying a record allows you to create a new record with the same details as the original. This can save you time from manually entering all the details in the new record. For example, if a user creates a contract, you might want to create another contract on their behalf, automatically including the relevant details from the first contract.

To copy a record:

- 1. Select the checkbox next to the desired record.
- 2. Hover over Actions on the action bar.
- 3. Click Copy.
- 4. In the confirmation dialog, click Finish.



Copying records