



Atrio Copy Address

Version 8

User Guide

Table of Contents

Introduction	3
Using Atrio Copy Address	3
Support	5
Disclaimer	5

Introduction

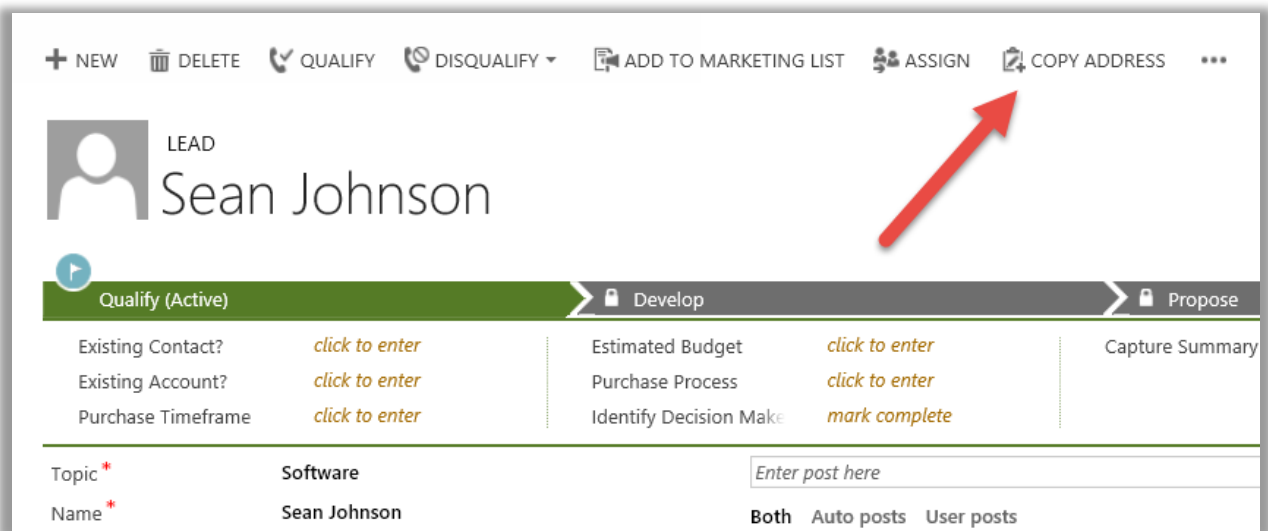
This document is designed as an introductory guide for Microsoft Dynamics CRM users to learn the basics of using the Atrio Copy Address product.

Atrio Copy Address is a very convenient tool; with one click you can copy Lead, Account or Contact address to the Windows clipboard, permitting you to conveniently paste the address into Word documents, text documents, etc.

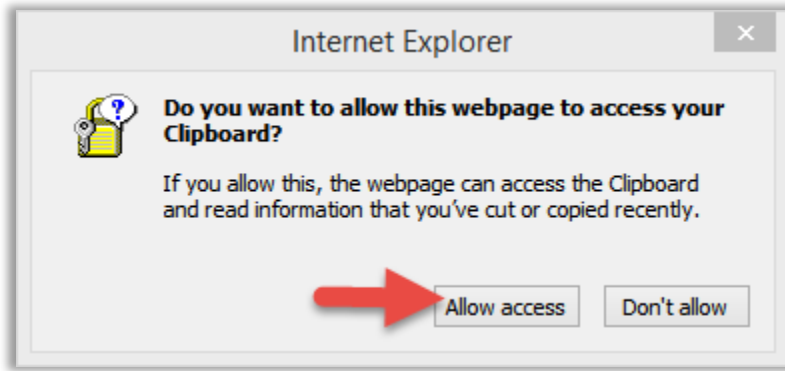
Using Atrio Copy Address

After the solution has been imported, a new button “Copy Address” will appear on the ribbon of Account, Contact, and Lead forms. Clicking the button copies the name of the Lead or Contact and the company, if there is a company name for the record. Upon clicking the button, a dialog box will appear telling you the address has been copied. Now the user can simply paste the information to a word document, text file, etc. If a contact or lead doesn’t have a company on the record it will copy just Name and Address, however with Accounts only the company name and address are copied.

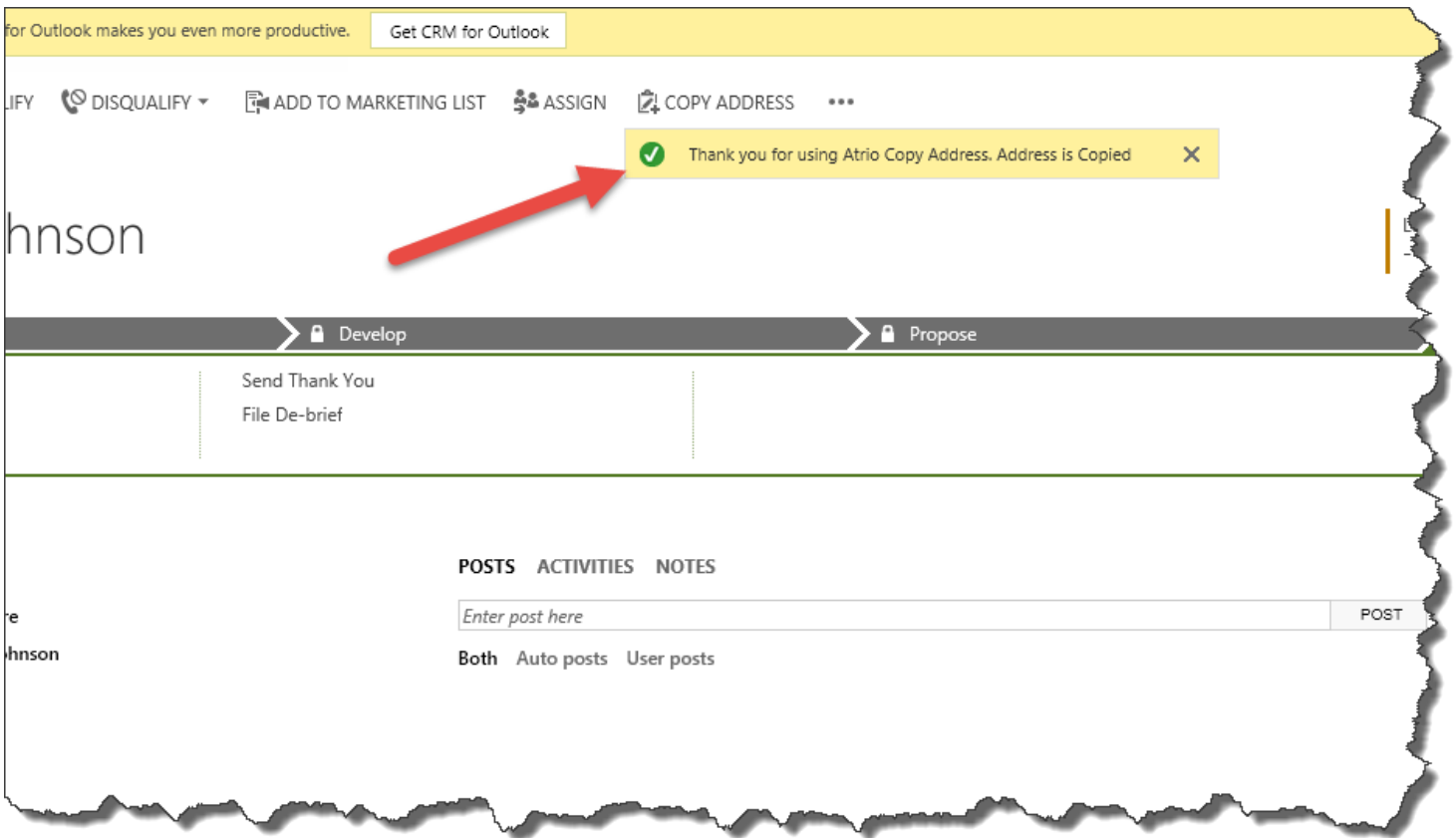
1. Click the **Copy Address** button



2. Click **Allow access** and the record’s address with name is copied to the clipboard



3. You will then see a confirmation that the address has been copied



Here is an example of how the copied address and name looks after pasting.

Topic *	Software
Name *	Sean Johnson
Job Title	--
Business Phone	--
Mobile Phone	--
Email	--
COMPANY	
Company +	USB Solutions
Website	--
Address	1233 Oak St. Rochester Hills, MI 48309 USA

Sean Johnson
 USB Solutions
 1233 Oak St.
 Rochester Hills, MI 48309
 USA

Support

Please send any product issues and suggestions to support@atriosystems.com.

Disclaimer

THIS SOFTWARE IS PROVIDED "AS IS", AND ATRIO SYSTEMS, INC. DISCLAIMS ALL WARRANTIES WITH REGARD TO THIS SOFTWARE INCLUDING ALL IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE. IN NO EVENT SHALL ATRIO SYSTEMS, INC. BE LIABLE FOR ANY SPECIAL, INDIRECT, OR CONSEQUENTIAL DAMAGES OR ANY DAMAGES WHATSOEVER RESULTING FROM LOSS OF USE, DATA OR PROFITS, WHETHER IN ACTION OF CONTRACT, NEGLIGENCE, OR OTHER TORTIOUS ACTION, ARISING OUT OF OR IN CONNECTION WITH THE USE OR PERFORMANCE OF THIS SOFTWARE.