Click2Clone
White Paper

Aim:

It is a one-click option to create a new record by copying data from existing record. The time and effort of entering data repeatedly are reduced especially when multiple records have to be created with the same data.

Features:

- Offers the ability to clone system as well as custom entities.
- Easy to configure with the ability to select the fields to be carried over.
- Easy shortcuts for cloning in case of having multiple templates for a particular entity.
- Allowed to carry over related records from 1:N and N:N relationships.
- Ability to clone records with Workflow along with the updated data in the new cloned record.
- Ability to configure Prefix & Suffix for cloned records.
- Hierarchical relationship cloning supported.
- Quickly clone multiple records at a time.
- Set references of the source record on the cloned record and vice versa
- Clone details along with relationships of the record from one entity to another entity.
- Copy only related records from another record.

Supported Versions

Versions: Microsoft Dynamics CRM 2013 and above.

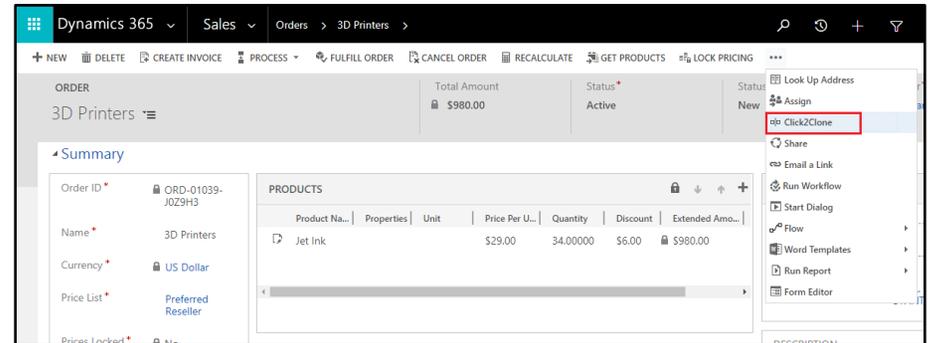**Deployment Models:** On-Premise, Online and Partner Hosted.

Who needs it?

Click2Clone would help any CRM implementation with substantial volume of repetitive manual data entry that costs a lot of time and effort.

Using Click2Clone, you can create template records with the desired repetitive data and use the template to clone and create new records whenever required thereby

reducing the data entry time. This can be done for most CRM entities, system as well as custom.
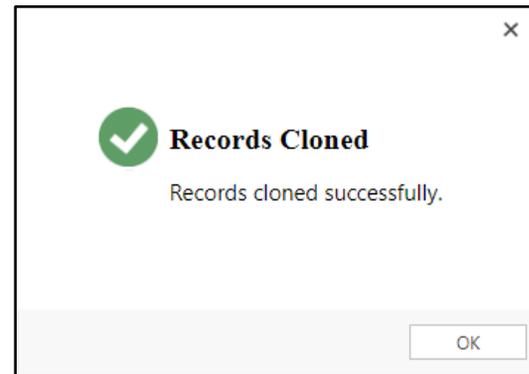
Ease of Access

'**Click2Clone**' can be easily accessed from the ribbon on the form as well as on the ribbon in the entity home page

Bulk Cloning for multiple records

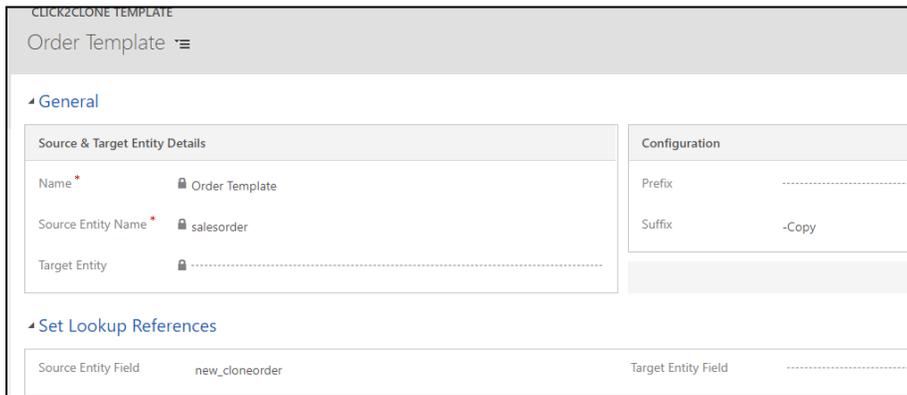With the help of Click2Clone the users can do bulk cloning for multiple records

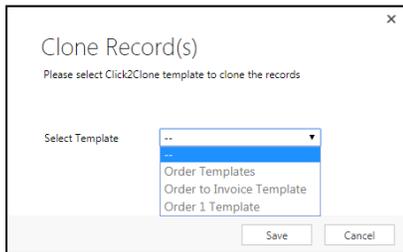## Click2Clone Template Configuration

The Click2Clone template enables the user to select attributes and relationships to be carried over when the record is being cloned. You have the flexibility of creating multiple templates per entity.

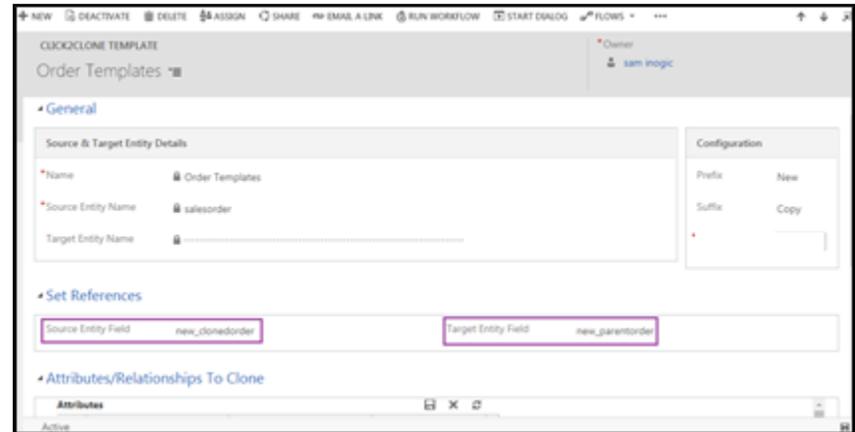Among multiple templates, you need to select the template that will be used by the 'Click2Clone' button.

Easy shortcuts for cloning

To clone a record based on a particular template in case you have more than one template defined for an entity, you can easily add a new ribbon button and specify the template to be used.
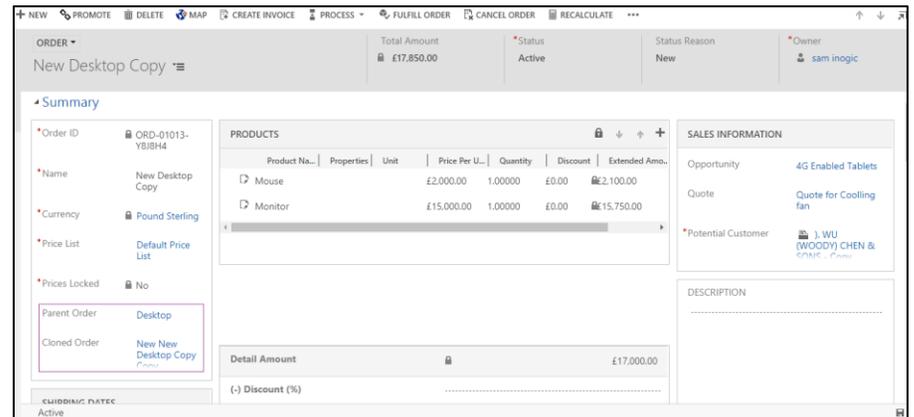

Set References of Source and Cloned Record

Click2Clone supports the feature of storing the references of Source record on the Cloned Record and vice versa. Users can identify the source and target reference of the record by defining the references in the Click2Clone template.
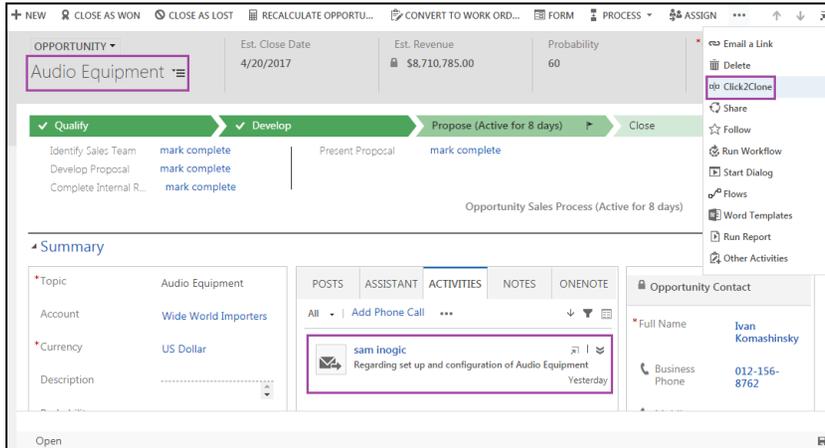

Once the source and target entity fields are set as a reference in the template, references would be visible on the selected entity record after cloning.
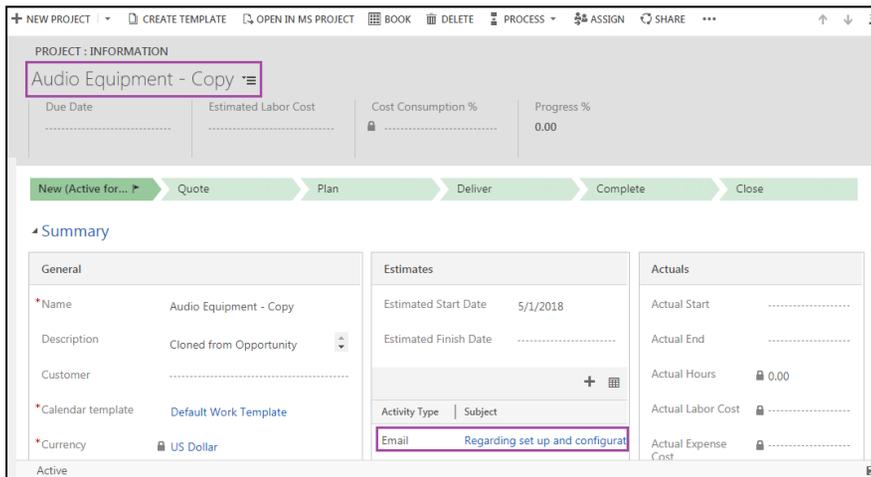
Copy record details along with the relationships from one entity to other entity

Click2Clone supports the cloning of records along with the relationships from one entity record to other entity record.
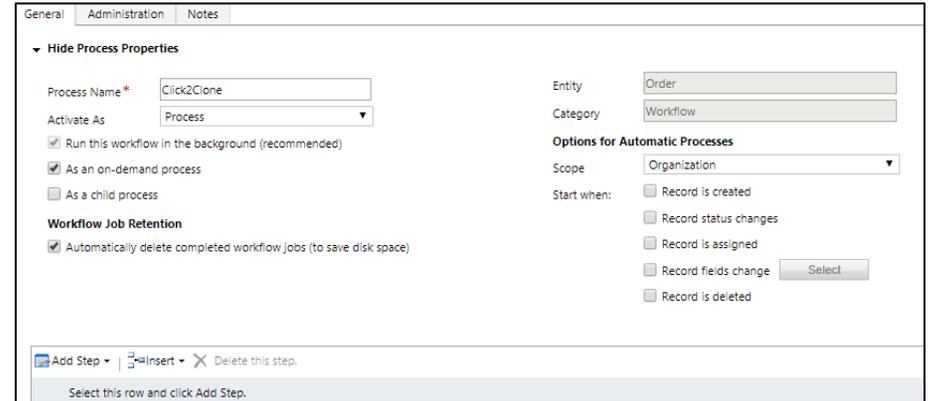

After clicking on Click2Clone button the source entity record details along with the relationships gets cloned on target entity and new record is created.
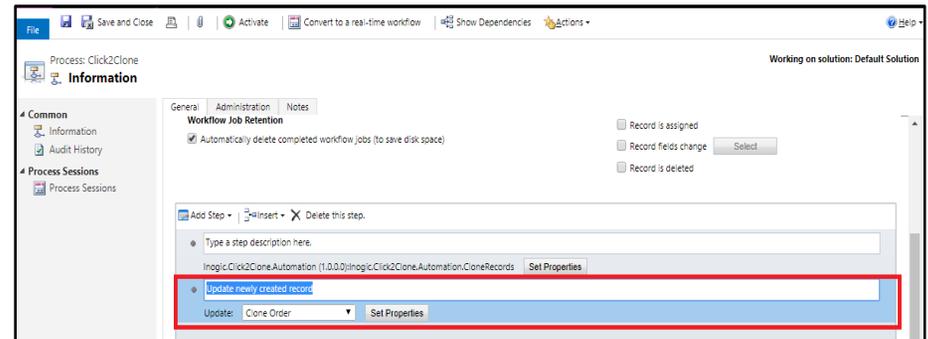

Create Workflow

Click2Clone supports cloning with workflow. This helps the user to automate the process of cloning rather than every time clicking on Click2Clone button.

Workflow gets triggered based on record create, delete, update, etc. of the selected entity. User can also do needful updates in the data of the cloned record with the help of workflow.

Get Records

Get Records functionality is to bring child records from Source record to Target record of the same entity. By clicking Get Records on Target Record selected relationships from Source Record will be cloned to Target Record within same Entity.

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