



Click2Clone

User Manual

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Introduction

Click2Clone is a Microsoft Dynamics 365 Customer Engagement add-on, which helps to create a new record quickly by copying data from an existing record, thereby, saving the time of data entry especially when repetitive records need to be created with the same data.

With Click2Clone, we have made the '**Clone**' feature available for most entities in the latest versions of Microsoft Dynamics CRM.

Salient Features

- Offers the ability to clone system as well as custom entities.
- Easy to configure with the ability to select the fields that need to be cloned.
- Easy shortcuts for cloning in case of having multiple templates for a particular entity.
- Allows to carry over related records from 1:N and N:N custom relationships.
- Ability to clone records through workflow and also update values of the new cloned record further.
- Ability to configure Prefix & Suffix for cloned records.
- Hierarchical relationship cloning supported.
- 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 records from one entity to another entity.
- Copy only related records from another record.
- Set Rules to select records for cloning.

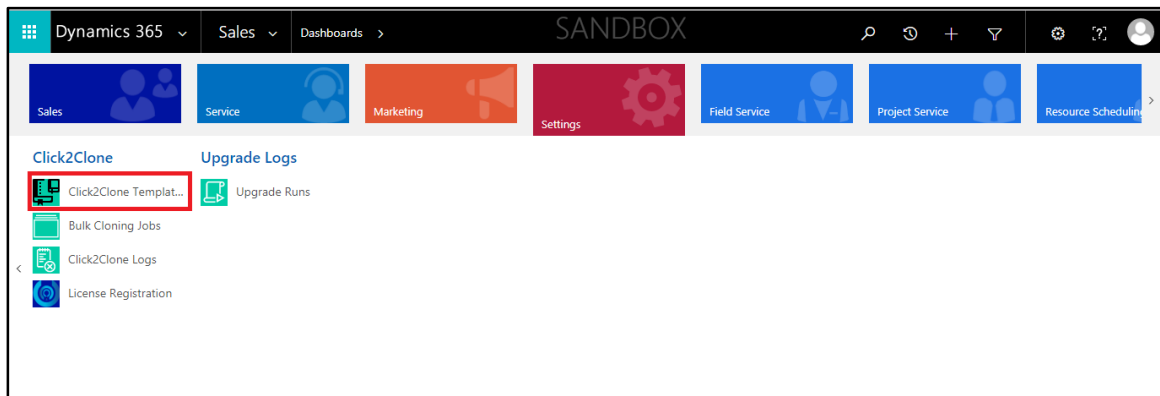
Available for -

Microsoft Dynamics CRM: 2013 and above, Dynamics 365 Customer Engagement.

Deployment: On-Premises, Online, and Partner-hosted.

Creating a Click2Clone Template

1. Navigate to **'Settings'** and then click **'Click2Clone Template'** entity in the sitemap. Next, click **'New'** to create the Click2Clone template.



2. Fill the details in the template. Enter the **'Name', 'Source Entity Name'** in **Source & Target Entity Details** section. In addition, the user have the option to configure the **'Prefix'** and **'Suffix'** in the template to be added on the cloned records.
 - The name of the template must be unique and should not match with the names of the already existing template records in the CRM.
 - The entity for which the template needs to be created should be present in the CRM.
 - **'Entity Schema Name'** needs to be entered in **'Source Entity Name'** field.
3. After filling all details, click **'Save'** to save the template as shown below.

 A screenshot of the 'New Click2Clone Template' form in Dynamics 365. The form has a header with 'CLICK2CLONE TEMPLATE' and 'New Click2Clone Template'. The user 'sam inogic' is logged in as the owner. The 'General' section is expanded, showing two main areas: 'Source & Target Entity Details' and 'Configuration'.

Source & Target Entity Details		Configuration	
Name *	Order Template	Prefix	
Source Entity Name *	salesorder	Suffix	-Copy
Target Entity			

4. By default, all the attributes in the grid are checked, and relationships are unchecked. The user need to select the attributes and the relationships which need to be cloned and then click on **'Save'** button provided on the grid.

Attributes/Relationships To Clone

Attributes			Relationships	
Schema Name	Logical Name	Type	Schema Name	Relationship Type
<input checked="" type="checkbox"/> LastBackofficeSubmit	lastbackofficesubmit	DateTime	<input type="checkbox"/> salesorder_ikl_saveroutes	OneToManyRelationship
<input checked="" type="checkbox"/> SLAId	slaid	Lookup	<input type="checkbox"/> SalesOrder_Appointments	OneToManyRelationship
<input checked="" type="checkbox"/> BillTo_Line1	bilto_line1	String	<input type="checkbox"/> SalesOrder_Emails	OneToManyRelationship
<input checked="" type="checkbox"/> SubmitStatusDescription	submitstatusdescription	Memo	<input type="checkbox"/> SalesOrder_Faxes	OneToManyRelationship
<input checked="" type="checkbox"/> BillTo_Line2	bilto_line2	String	<input type="checkbox"/> SalesOrder_Letters	OneToManyRelationship
<input checked="" type="checkbox"/> QuoteId	quoteid	Lookup	<input type="checkbox"/> SalesOrder_Phonecalls	OneToManyRelationship
<input checked="" type="checkbox"/> ShipTo_Country	shipto_country	String	<input type="checkbox"/> SalesOrder_Tasks	OneToManyRelationship
<input checked="" type="checkbox"/> SubmitDate	submitdate	DateTime	<input type="checkbox"/> SalesOrder_Annotation	OneToManyRelationship
<input checked="" type="checkbox"/> PaymentTermsCode	paymenttermscode	Picklist	<input type="checkbox"/> SalesOrder_ServiceAppointments	OneToManyRelationship

5. Next is the Child Template section. If user want to clone the child records and particular fields in child record then user can add the required Child Template for the purpose of cloning related records. If there are more than one template added in the Child Template section, then by default that many times the child records specified in each template will be cloned. Hence, the user need to ensure that only one template per entity is created and then click on **Save**.

Child Template

Name	Entity Name	Target Entity Name	Created On
Opportunity Template	opportunity		7/18/2019 4:57 PM
Opportunity Template 1	opportunity		7/18/2019 5:03 PM
Order Template	salesorder		7/18/2019 5:46 PM

[Look Up More Records](#)

Child Template

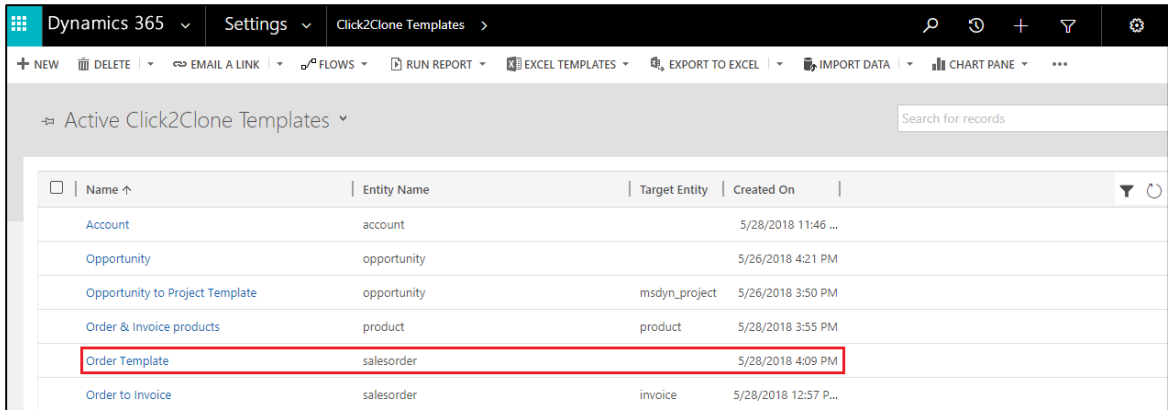
Name	Entity Name	Target Entity Name	Created On
Order Template 1	salesorder		7/18/2019 5:47 PM

[Look Up More Records](#)

1 result + New

6. The created template will then get displayed in **'Active Click2Clone Templates'**.

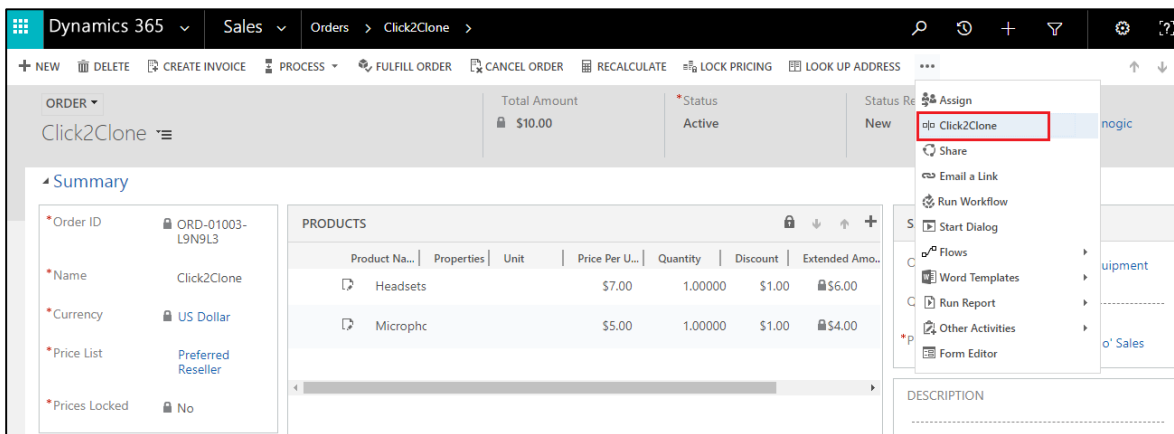
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The screenshot shows the 'Active Click2Clone Templates' list in Dynamics 365. The table has columns for Name, Entity Name, Target Entity, and Created On. The 'Order Template' row is highlighted with a red border.

Name	Entity Name	Target Entity	Created On
Account	account		5/28/2018 11:46 ...
Opportunity	opportunity		5/26/2018 4:21 PM
Opportunity to Project Template	opportunity	msdyn_project	5/26/2018 3:50 PM
Order & Invoice products	product	product	5/28/2018 3:55 PM
Order Template	salesorder		5/28/2018 4:09 PM
Order to Invoice	salesorder	invoice	5/28/2018 12:57 P...

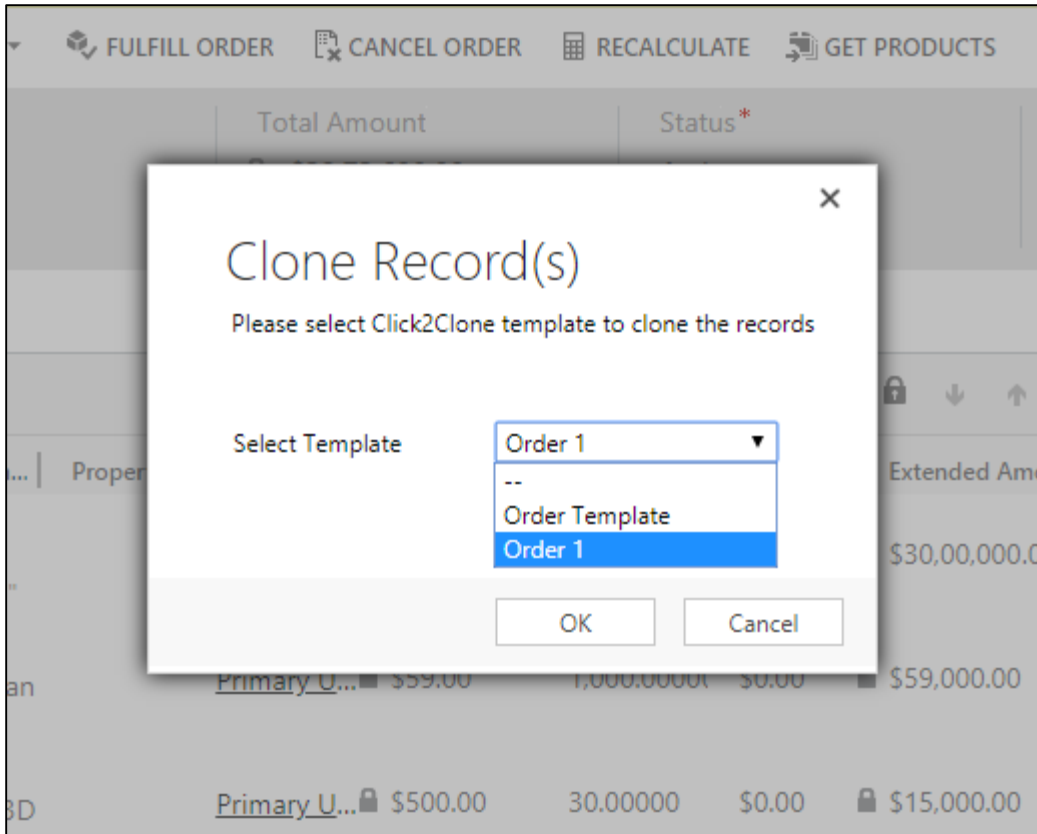
- Once you create the template and want to clone the record, you will have to click on Click2Clone button that is present on the selected entity record. After clicking on Click2Clone button the new cloned record is created in case you have only one template for selected entity.



The screenshot shows the 'Click2Clone' button highlighted in a context menu. The menu is open over a record, and the 'Click2Clone' option is selected. The record details show 'ORD-01003-L9N9L3' and 'Click2Clone' as the name.

Product Name	Properties	Unit	Price Per U...	Quantity	Discount	Extended Amo...
Headsets			\$7.00	1.00000	\$1.00	\$6.00
Microphc			\$5.00	1.00000	\$1.00	\$4.00

- If you have multiple templates for single entity then you will get the pop up window where you need to select the template as shown below.

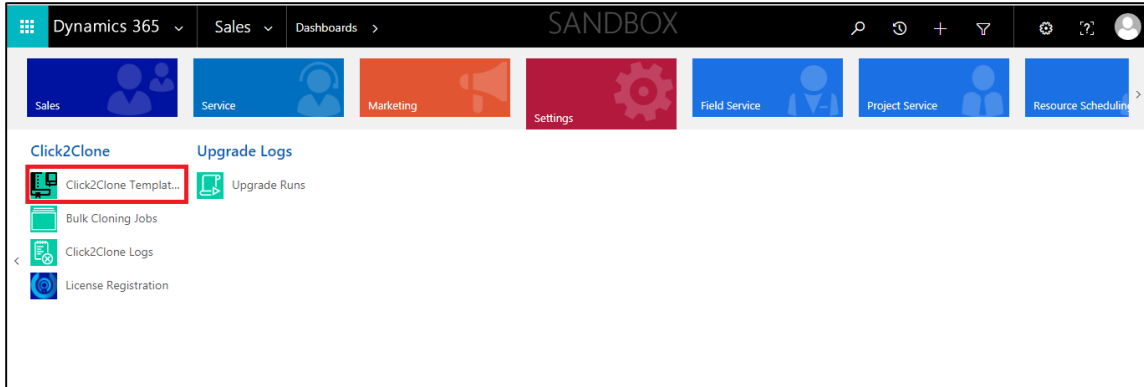


Set References for Source Record and Cloned Record

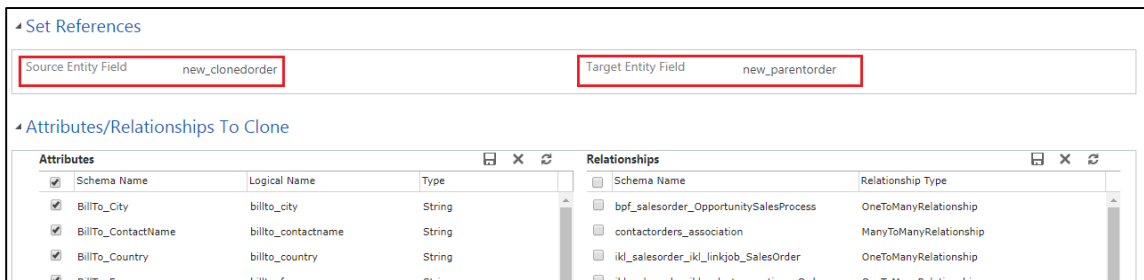
Users can set the reference of the newly created record on the source record and vice versa with the help of Set References feature. Users can update the required data in the cloned record with the help of set references using workflow. Using Set References users can identify the source record from which the cloned record was created and vice versa. For e.g. In case there are multiple records of an entity with the same name then it is possible for the user to define the source and target references of the record with the help of Set References feature.

- **Source Entity Field** will set the target (cloned) reference of the selected record after cloning. The users need to enter the logical name of the field for which they would like to set the target reference.
 - **Target Entity Field** will set the source (parent) reference of the selected record after cloning. The users need to enter the logical name of the field for which they would like to set the source reference.
1. To set the references navigate to **Settings > Click2Clone Templates**. Select the Click2Clone Template created for Order entity.

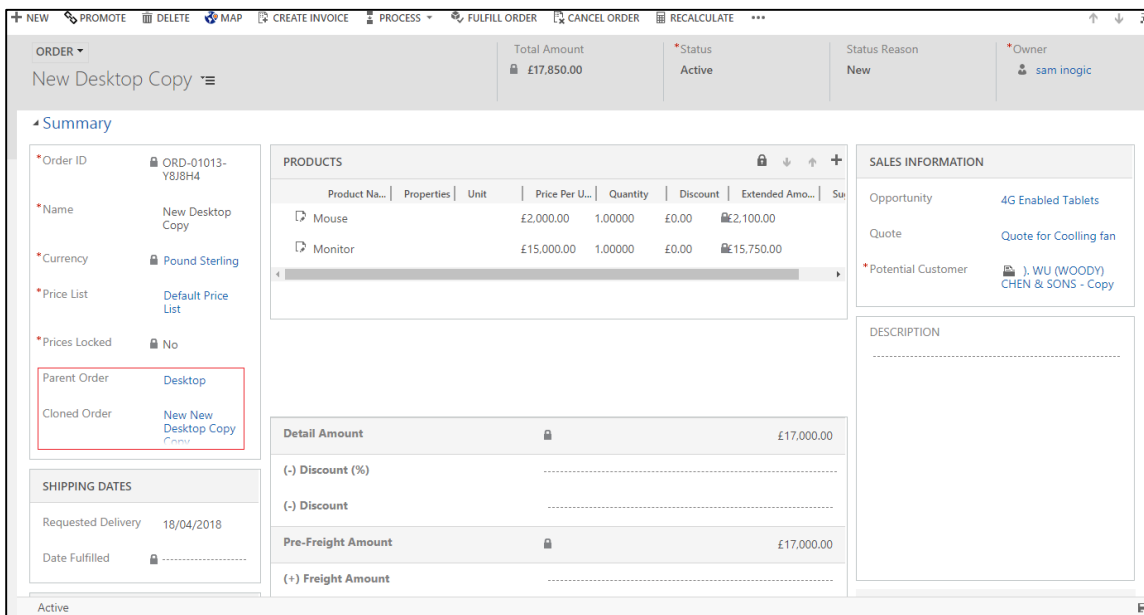
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- To set the references enter the source and target entity fields in the Click2Clone template.



- When user clones the record after source and target reference field are set, the Parent Order and Cloned Order fields are set with source and target references respectively.



Note:

- The source and target entity fields can be OOB or custom.

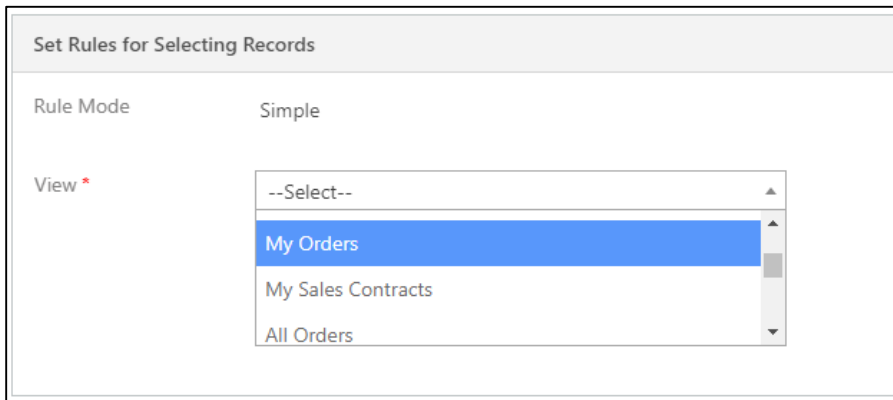
- The source and target entity fields are optional. Users can select both or any of them as per their needs.

Set Rules for Selecting Records

Users can set rules for selecting records for the purpose of cloning with the help of Rule Mode. For example - Previously while cloning, if there are 10 line items in a record then all 10 of them were cloned. But now, if the user needs only 5 of those line items then only that particular line items will be cloned depending upon the selected Rule Mode.

There are two types of Rule Mode – Simple and Advanced.

1. **Simple Rule Mode:** Select necessary records for cloning based on the View of an entity.



The screenshot shows a dialog box titled "Set Rules for Selecting Records". Inside, the "Rule Mode" is set to "Simple". Below it, the "View" field has a dropdown menu open. The dropdown list contains the following items: "--Select--", "My Orders" (which is highlighted in blue), "My Sales Contracts", and "All Orders".

2. **Advanced Rule Mode:** Select records for cloning based on filter criteria or conditions (conditions defined in Fetch XML)

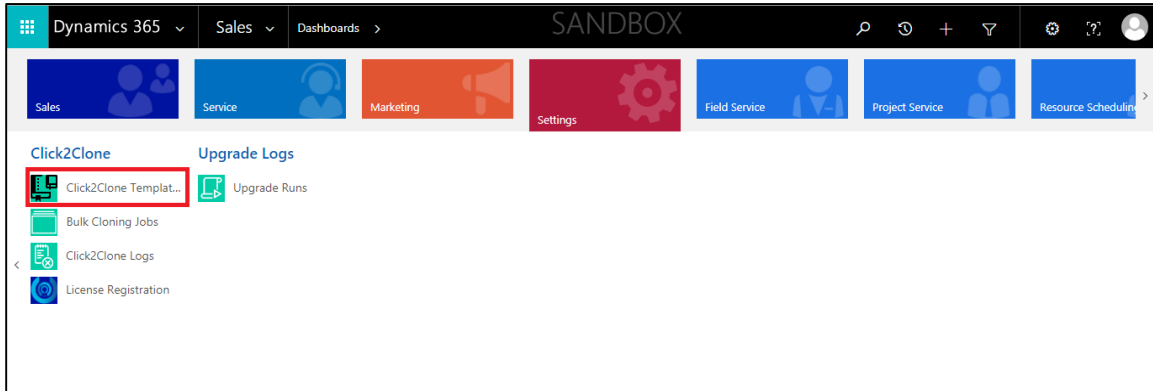


The screenshot shows a dialog box titled "Set Rules for Selecting Records". Inside, the "Rule Mode" is set to "Advanced". Below it, the "Fetch XML" field contains the text: "<fetch version="1.0" output-format="xml-platform". There is a small expand/collapse icon to the right of the text.

Clone records details along with the relationship from one entity to another entity

1. Click2Clone until now supported the self-cloning i.e. creating a copy of the same entity record. Click2Clone now supports the feature of cloning the details from one entity to another entity record. For this user needs to set the **Target Entity Name** field in the Click2Clone template.

For that navigate to **Settings > Click2Clone Templates**






- Let's take an example of cloning the record of **Opportunity** entity to **Project** entity and in Click2Clone template set the Target Entity Name as Project.

The screenshot displays the configuration page for a template named 'opportunity to project template'. The page is divided into two main sections: 'General' and 'Set Lookup References'. The 'General' section is expanded and contains two sub-sections: 'Source & Target Entity Details' and 'Configuration'.

Source & Target Entity Details		Configuration	
Name *	🔒 opportunity to project template	Prefix	-----
Source Entity Name *	🔒 opportunity	Suffix	- Copy
Target Entity	🔒 msdyn_project		

Below the 'General' section, there is a link for 'Set Lookup References'.

- After defining the Target Entity Name, the user needs to map the Source entity attributes with the Target entity attributes in the Fields Mapping section on the template and click on '**Save**' button of the grid. The target entity attributes will be displayed in option set with the same data type as that of the source entity attributes.

Attributes




Schema Name	Type	Target Schema Name
ActualCloseDate	DateTime	msdyn_actualend
ActualValue	Money	msdyn_actuallaborcost_Base
BudgetAmount	Money	msdyn_plannedexpensecost
BudgetStatus	Picklist	msdyn_CostPerformance
CampaignId	Lookup	
CaptureProposalFeedback	Boolean	msdyn_istemplate
CloseProbability	Integer	ImportSequenceNumber
CompleteFinalProposal	Boolean	

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4. Now user can also clone the relationships from one entity to another entity. For that user needs to create child template. With the help of this child template the user can clone relationships i.e. child records can be cloned from one entity to another entity record.
For e.g. In Opportunity to Project – When the user creates the Child template for email relationship user will be able to clone the Emails from Opportunity record to Project record.

Child Template				
Child Template				
Name	Entity Name	Target Entity	Created On	
Opportunity Email to Project Email	email	email	5/26/2018 3:1...	

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CLICK2CLONE TEMPLATE

Opportunity email to Project email

General

Source & Target Entity Details

Name * Opportunity email to Project email

Source Entity Name * email

Target Entity * email

Source Entity Relationship Opportunity_Emails

Target Entity Relationship new_msdyn_project_email

Configuration

Prefix

Suffix

Fields Mapping

Attributes

Schema Name	Type	Target Schema Name
ActivityAdditionalParams	Memo	

- Once the user defines the template for cloning records from one entity to another entity along with the relationships and click on Click2Clone button, the source entity record gets cloned and new record of target entity is created along with the selected child records.

Selected Opportunity with an Email activity:

Dynamics 365 Sales Opportunities Audio Equipment

NEW CLOSE AS WON CLOSE AS LOST RECALCULATE OPPORTU... CONVERT TO WORK ORD... FORM PROCESS ASSIGN

OPPORTUNITY Audio Equipment Est. Close Date 4/20/2017 Est. Revenue \$8,710,785.00 Probability 60 Owner sam inogic

Qualify Develop Propose (Active for 6 days, 23 hours) Close

Identify Sales Team mark complete Develop Proposal mark complete Complete Internal R... mark complete Present Proposal mark complete

Opportunity Sales Process (Active for 6 days, 23 hours) Next Stage

Topic Audio Equipment Account Wide World Importers Currency US Dollar Description

POSTS ASSISTANT ACTIVITIES NOTES ONENOTE

All Add Phone Call

sam inogic Regarding set up and configuration of Audio Equipment Today

Opportunity Contact Full Name Ivan Komashinsky Business Phone 012-156-8762

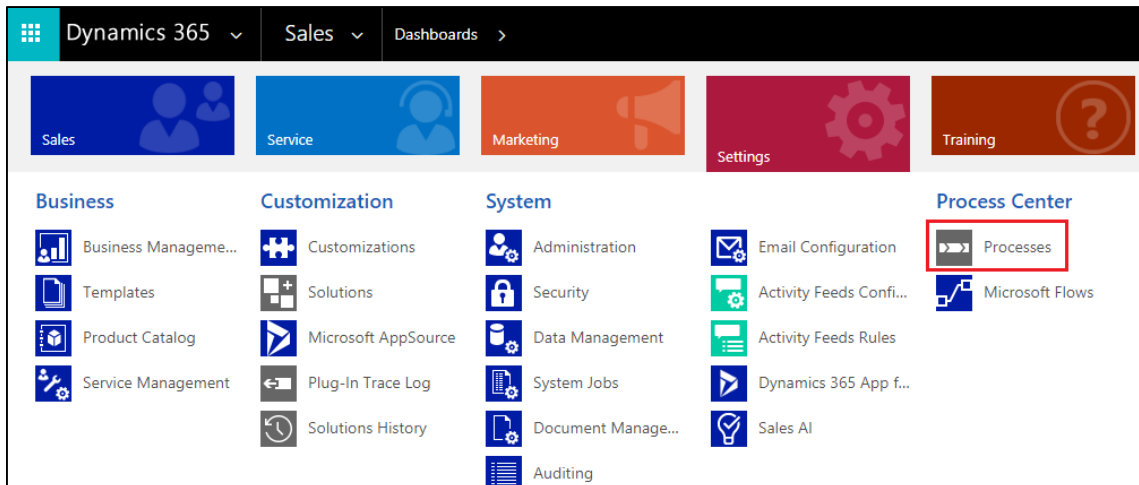
Cloned Project with Email activity present on Opportunity:

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The screenshot shows the Dynamics 365 Project Service interface. The top navigation bar includes 'Dynamics 365', 'Project Service', and 'Projects > Audio Equipment - C...'. Below the navigation bar, there are buttons for 'NEW PROJECT', 'CREATE TEMPLATE', 'OPEN IN MS PROJECT', 'BOOK', 'DELETE', 'PROCESS', 'ASSIGN', 'SHARE', and 'EMAIL A LINK'. The main content area is divided into two sections. The top section, titled 'PROJECT : INFORMATION', contains fields for 'Due Date', 'Estimated Labor Cost', 'Cost Consumption %', and 'Progress %' (0.00). The bottom section, titled 'New (Active for...)', contains a table with columns for 'Name', 'Description', 'Customer', 'Calendar template', 'Currency', 'Estimated Start Date', 'Estimated Finish Date', 'Actual Start', 'Actual End', 'Actual Hours', 'Actual Labor Cost', and 'Actual Expense Cost'. The 'Name' field is 'Audio Equipment - Copy', 'Description' is 'Cloned from Opportunity', 'Customer' is blank, 'Calendar template' is 'Default Work Template', 'Currency' is 'US Dollar', 'Estimated Start Date' is '5/1/2018', 'Estimated Finish Date' is blank, 'Actual Start' is blank, 'Actual End' is blank, 'Actual Hours' is '0.00', 'Actual Labor Cost' is blank, and 'Actual Expense Cost' is blank. The 'Email' activity is highlighted with a red box, and its subject is 'Regarding set up and configurati...'. The 'Activity Type' is 'Email' and the 'Subject' is 'Regarding set up and configurati...'. The 'Activity Type' and 'Subject' fields are also highlighted with a red box.

Creating Click2Clone Workflow

1. Click2Clone now supports cloning with workflows. To create a workflow, navigate to **Settings > Processes** and click on **'New'** to create a new workflow.



2. Enter the **'Process Name'**, select the **'Category'** as **'Workflow'** and **'Entity'** for which you want to create this workflow. Click on **'OK'**.

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Create Process

Define a new process, or create one from an existing template. You can create four kinds of processes: business process flows, actions, dialogs, and workflows.

Process name: *

Click2Clone

Category: *

Workflow

Entity: *

Order

☒ Run this workflow in the background (recommended)

Type:

☒ New blank process
 ☐ New process from an existing template (select from list):

Template Name ↑	Primary Entity	Owner
<div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>		

Properties

OK

Cancel

3. Here you can select whether you want the Workflow to be On Demand or trigger on a change.

General
Administration
Notes

▼ Hide Process Properties

Click2Clone

Process Name *

Entity

Activate As

Process

Category

Workflow

☒ Run this workflow in the background (recommended)

☒ As an on-demand process

☐ As a child process

Workflow Job Retention

☒ Automatically delete completed workflow jobs (to save disk space)

Options for Automatic Processes

Scope

Organization

Start when:

☐ Record is created
 ☐ Record status changes
 ☐ Record is assigned
 ☐ Record fields change
 ☐ Record is deleted

Select

Add Step

Insert

Delete this step.

Select this row and click Add Step.

4. Click2Clone ships with workflow assemblies namely **'Inogic.Click2Clone.Automation'**

5. Click on **'Add Step'**, and click on **'Inogic.Click2Clone.Automation'** you will see **'Inogic.Click2Clone.Automation.CloneRecords'**. With this assembly user can clone large

Create Process

Define a new process, or create one from an existing template. You can create four kinds of processes: business process flows, actions, dialogs, and workflows.

Process name: *

Click2Clone

Category: *

Workflow ▼

Entity: *

Order ▼

☒ Run this workflow in the background (recommended)

Type:

☒ New blank process

☐ New process from an existing template (select from list):

Template Name ↑	Primary Entity	Owner
-----------------	----------------	-------

Properties

OK

Cancel

3. Here you can select whether you want the Workflow to be On Demand or trigger on a change.

General

Administration

Notes

▼ Hide Process Properties

Process Name *

Click2Clone

Activate As

Process ▼

☒ Run this workflow in the background (recommended)
 ☒ As an on-demand process
 ☐ As a child process

Workflow Job Retention

☒ Automatically delete completed workflow jobs (to save disk space)

Entity

Order

Category

Workflow

Options for Automatic Processes

Scope

Organization ▼

Start when:

☐ Record is created
 ☐ Record status changes
 ☐ Record is assigned
 ☐ Record fields change
 ☐ Record is deleted

Select

Add Step ▼

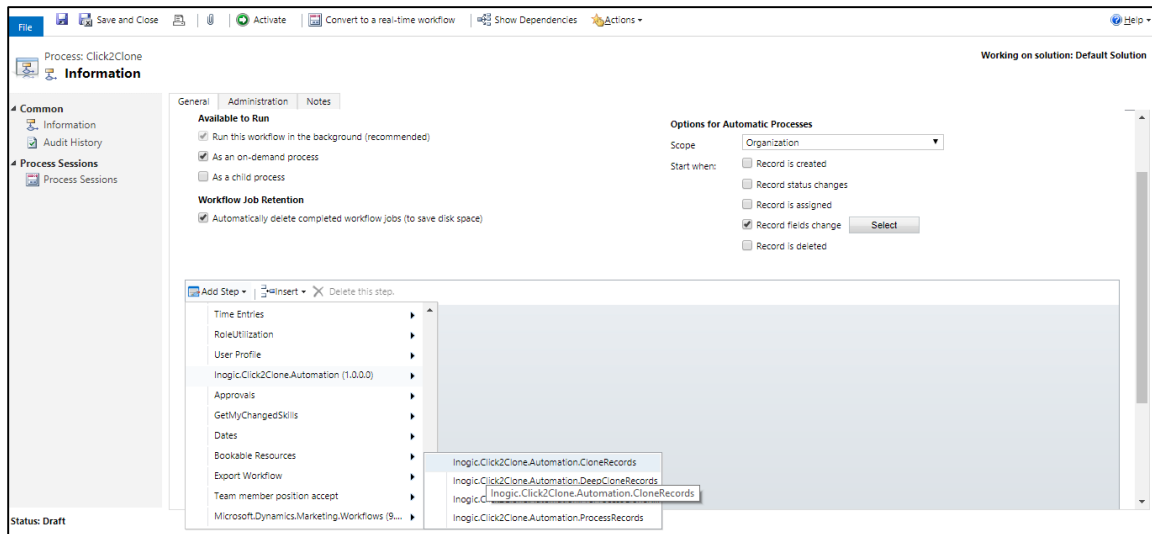
Insert ▼

Delete this step.

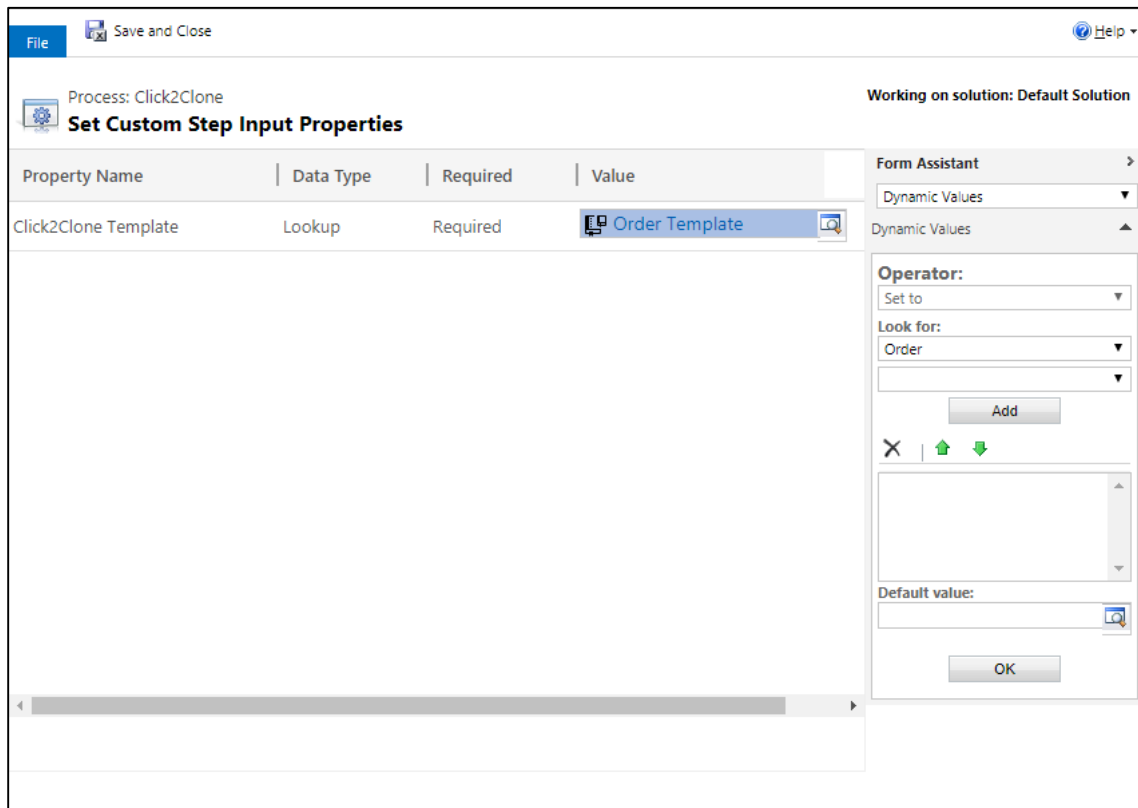
Select this row and click Add Step.

- Click2Clone ships with workflow assemblies namely **'Inogic.Click2Clone.Automation'**
- Click on **'Add Step'**, and click on **'Inogic.Click2Clone.Automation'** you will see **'Inogic.Click2Clone.Automation.CloneRecords'**. With this assembly user can clone large

number of related records for example, order with more than thousand line items.



- After you select this assembly click on **'Set Properties'** for **'Inlogic.Click2Clone.Automation.CloneRecords'**.



To see workflow status, navigate to settings → Click2Clone group → Bulk Cloning job

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The screenshot shows the Dynamics 365 interface in a 'SANDBOX' environment. The top navigation bar includes 'Dynamics 365', 'Settings', and 'Bulk Cloning Jobs'. Below the navigation bar, there's a search bar and a list of active cloning jobs. The table has columns: Name, Source Entity Name, Destination Entity Name, Click2Clone Template, Current Iterat..., Maximum Iteratio..., Next Run Tim..., and Page Count. Two jobs are listed: 'salesorder - order_details' and 'salesorder - order_invoices', both with a page count of 1.

Name	Source Entity Name	Destination Entity Name	Click2Clone Template	Current Iterat...	Maximum Iteratio...	Next Run Tim...	Page Count
salesorder - order_details	salesorder	salesorder			6		1
salesorder - order_invoices	salesorder	salesorder			6		1

It will show status of the cloning jobs as seen in the screenshot below.

This screenshot shows the 'Active Bulk Cloning Jobs' table with more columns: Destination Entity Na..., Click2Clone..., Current Iterat..., Maximum Iteratio..., Next Run Tim..., Page Count, Process X Rec..., Processed Records, Relationship, Status Reason, and Created On. Two jobs are shown, both with a status of 'In-Progress'.

Destination Entity Na...	Click2Clone...	Current Iterat...	Maximum Iteratio...	Next Run Tim...	Page Count	Process X Rec...	Processed Records	Relationship	Status Reason	Created On
salesorder		2	6	2/19/2019 7:...	1	50	0	order_details	In-Progress	2/19/2019 7:02 PM
salesorder		2	6	2/19/2019 7:...	1	50	0	order_invoices	In-Progress	2/19/2019 7:02 PM

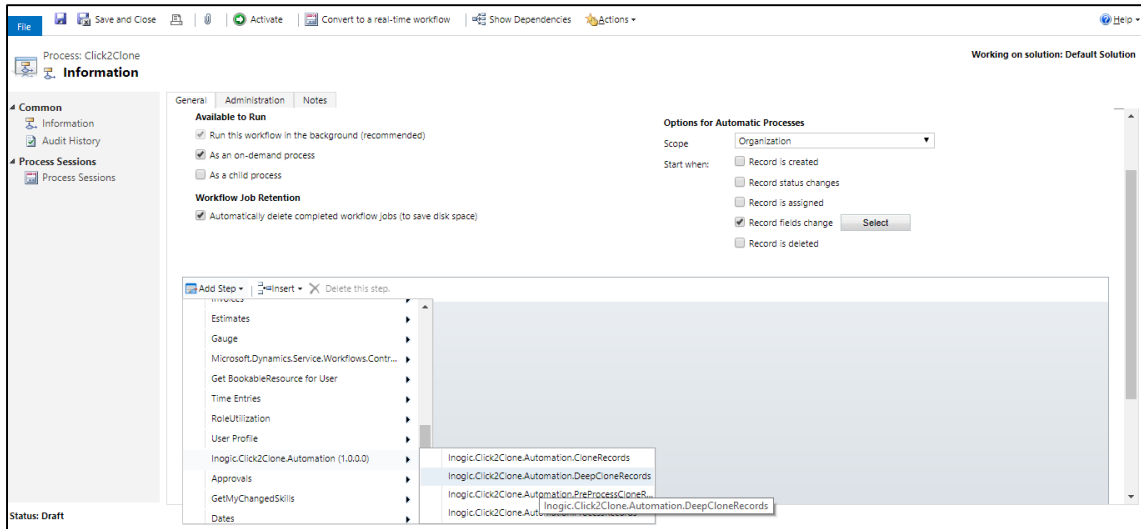
Once completed it will show Status as completed in “Inactive Bulk Cloning Jobs”

This screenshot shows the 'Inactive Bulk Cloning Jobs' table. The columns are similar to the previous one, but the 'Status Reason' column now shows 'Completed' for the 'order_details' job. The 'Processed Records' column is also highlighted.

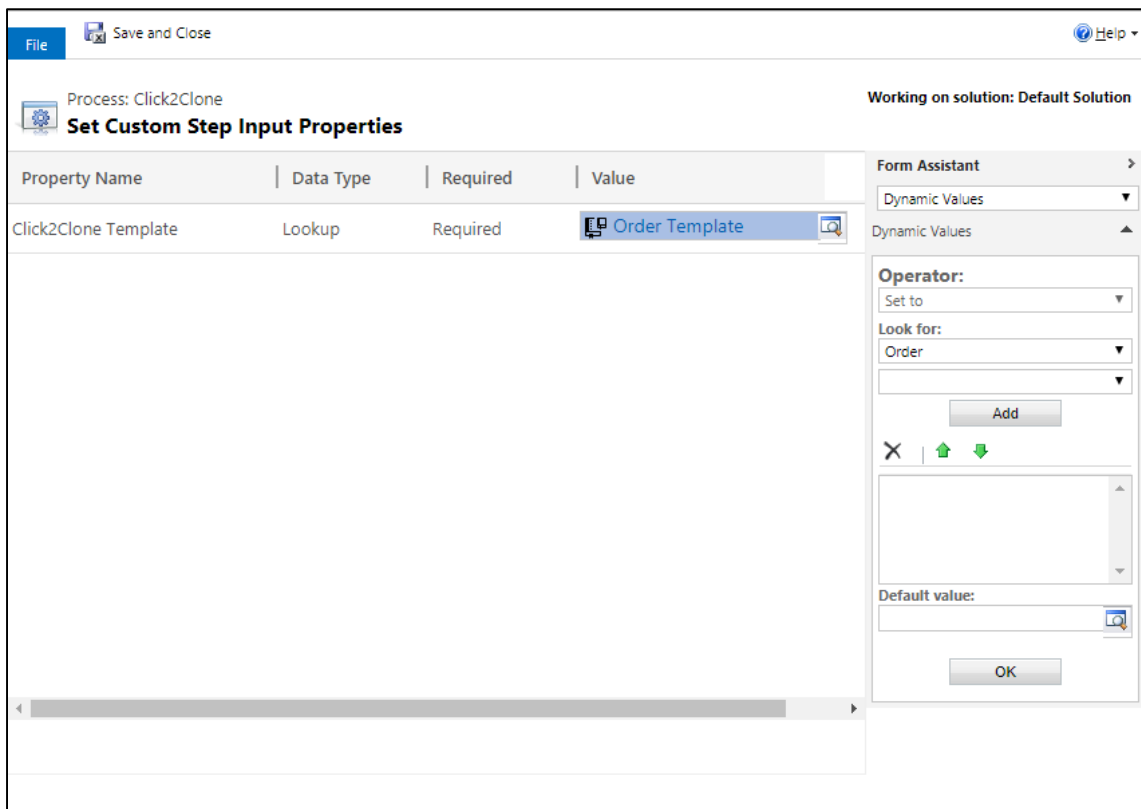
Destination Entity Na...	Click2Clone...	Current Iterat...	Maximum Iterations	Next Run Tim...	Page Count	Process X Rec...	Processed Records	Relationship	Status Reason	Created On
salesorder		2	6	2/19/2019 7:...	1	50	2	order_details	Completed	2/19/2019 7:02 PM

- With the Second assembly ‘Inogic.Click2Clone.Automation.DeepCloneRecords’ user can deep clone related records for example, Order with Order line items along with Invoice and Invoice line items.

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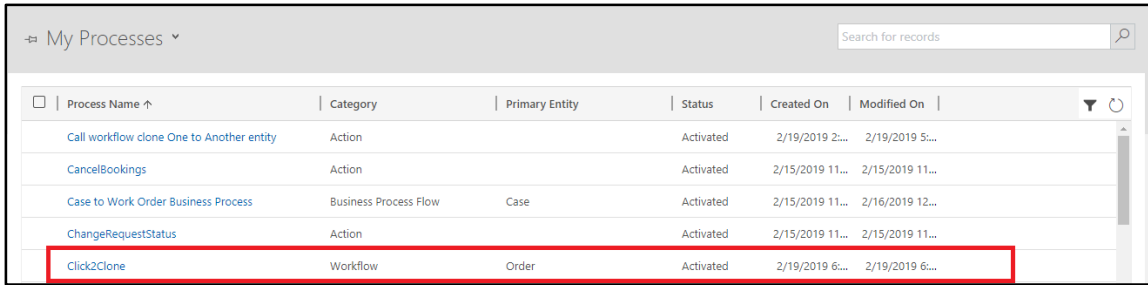


- After you select this assembly, click on **'Set Properties'** for **'Inogic.Click2Clone.Automation.DeepCloneRecords'**. Then select the **'Click2Clone Template'** for the Entity for which the workflow is created and click on **'Save and Close'**.



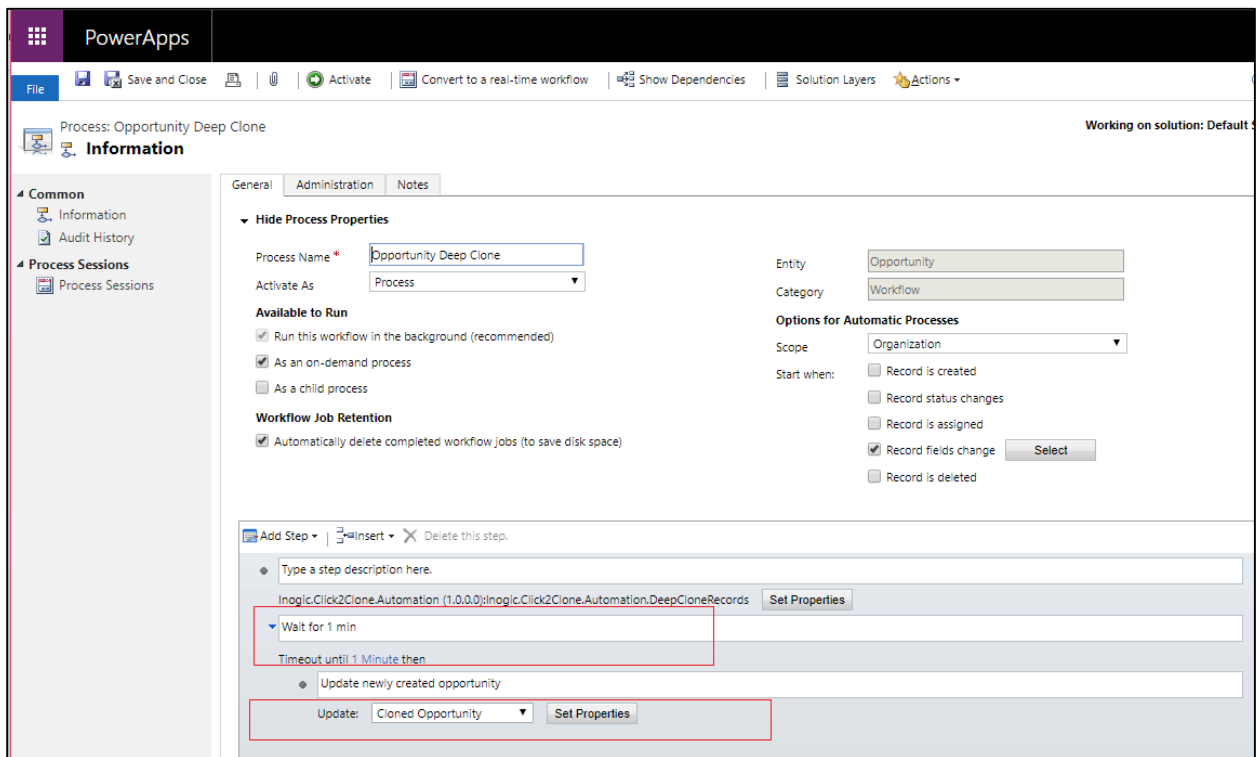
- Now **'Save'** and then **'Activate'** the process.
- You can now see the workflow in **'My Processes'**.

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Process Name	Category	Primary Entity	Status	Created On	Modified On
Call workflow clone One to Another entity	Action		Activated	2/19/2019 2...	2/19/2019 5...
CancelBookings	Action		Activated	2/15/2019 11...	2/15/2019 11...
Case to Work Order Business Process	Business Process Flow	Case	Activated	2/15/2019 11...	2/16/2019 12...
ChangeRequestStatus	Action		Activated	2/15/2019 11...	2/15/2019 11...
Click2Clone	Workflow	Order	Activated	2/19/2019 6...	2/19/2019 6...

11. Users can also do needful updates in the cloned record. With the help of workflow, the user can access the cloned record for further operations. Thus, the users can update the cloned record. For this users need to add a new step as Update and select the related entity. i.e. The display name of the source entity field value that is defined in the Set References section of respective Click2Clone Template.



PowerApps

File Save and Close Activate Convert to a real-time workflow Show Dependencies Solution Layers Actions

Process: Opportunity Deep Clone Working on solution: Default

Information

Common

- Information
- Audit History

Process Sessions

- Process Sessions

General Administration Notes

Hide Process Properties

Process Name * Opportunity Deep Clone

Activate As Process

Available to Run

- ☒ Run this workflow in the background (recommended)
- ☒ As an on-demand process
- ☐ As a child process

Workflow Job Retention

- ☒ Automatically delete completed workflow jobs (to save disk space)

Entity Opportunity

Category Workflow

Options for Automatic Processes

Scope Organization

Start when:

- ☐ Record is created
- ☐ Record status changes
- ☐ Record is assigned
- ☒ Record fields change
- ☐ Record is deleted

Add Step Insert Delete this step.

Type a step description here.

Inlogic:Click2Clone.Automation (1.0.0.0);Inlogic:Click2Clone.Automation.DeepCloneRecords Set Properties

Wait for 1 min

Timeout until 1 Minute then

Update newly created opportunity

Update: Cloned Opportunity Set Properties

Assigning Click2Clone Security Roles

Two new security roles, particularly for Click2Clone, come along with the solution.

1. **Click2Clone Administrator** – The Click2Clone Administrator is given the privilege to either create or modify the Click2Clone template.

2. **Click2Clone User** – Click2Clone User can clone records other than the Click2Clone Administrator. The user with Click2Clone user security role cannot create a template but can use it.

Click2Clone Business Scenarios

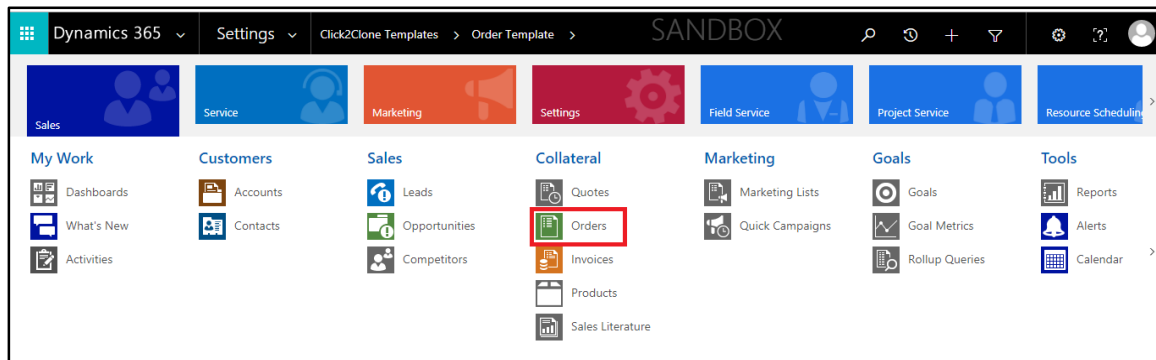
This one-click option can be used for different purposes.

- For a single record form.
- For a single record from the home page.
- For multiple records from the home page.

Click2Clone for a Single Record Form

Let us consider **‘Sales’** as the group/area and **‘Orders’** as the entity in the group.

1. Navigate to **‘Main’** -> **‘Sales’** -> **‘Orders’**



2. Select any view from the drop down list. Here, **‘My Orders’** has been selected.

My Orders ▾

<input type="checkbox"/>	Name ↑	Status Reason	Total Amount	Customer	Email (Customer)
	3D Printers	New	\$980.00	L. NATHANIEL STANT...	
	Desktop	New	\$1,950.00	A. DUBRAVKA ANTIC ...	
	Headset	New	\$750.00	A. IDA GALEA & SONS	
	Laptop	New	\$2,100.00	A. IDA GALEA & SONS	
	Mouse	New	\$800.00	R. ASHER HERSHKOWI...	
	Watch Accessories	New	\$793.00	A. ALEXANDRA HERRE...	

3. Once the user selects and opens the record to be cloned, the **'Click2Clone'** option is available for cloning as shown in the screenshot below.

The screenshot shows the Dynamics 365 interface for an 'ORDER' record titled '3D Printers'. The record details include: Total Amount \$980.00, Status Active, and a 'New' button. A context menu is open, displaying various actions. The 'Click2Clone' option is highlighted with a red rectangle. Other visible options include 'Look Up Address', 'Assign', 'Share', 'Email a Link', 'Run Workflow', 'Start Dialog', 'Flow', 'Word Templates', 'Run Report', and 'Form Editor'.

4. Once the record is cloned, its copy gets displayed on the screen. Alternatively you can clone the record using a workflow using **'Run Workflow'**.

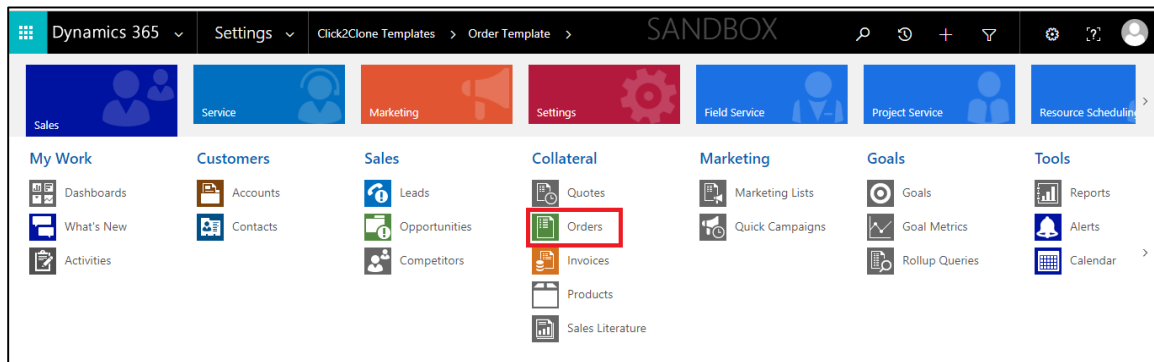
Click2Clone–User Manual

The screenshot displays the Microsoft Dynamics 365 interface for a new order record. The top navigation bar shows 'Dynamics 365' with a dropdown arrow, followed by 'Sales' and 'Orders' with a dropdown arrow. The breadcrumb path is 'New 3D Printers Copy'. The main header area includes a search icon, a refresh icon, a plus icon, a filter icon, and a settings icon. Below the header, the record title 'New 3D Printers Copy' is highlighted with a red box. The record details show 'Total Amount' as \$980.00, 'Status' as 'Active', 'Status Reason' as 'New', and 'Owner' as 'sam inogic'. The 'Summary' section is expanded, showing 'Order ID' as 'ORD-01045-J6X1W2', 'Name' as 'New 3D Printers Copy', 'Currency' as 'US Dollar', 'Price List' as 'Preferred Reseller', 'Prices Locked' as 'No', 'Source Order', and 'Cloned Order'. The 'PRODUCTS' table lists one product: 'Jet Ink' with a quantity of 34.00000, a price per unit of \$29.00, a discount of \$6.00, and an extended amount of \$980.00. The 'SALES INFORMATION' section shows 'Opportunity', 'Quote', and 'Potential Customer' as 'L. NATHANIEL STANTON & SONS'. The 'DESCRIPTION' section is empty. The 'Detail Amount' is \$980.00.

Click2Clone for a Single Record from the Home Page

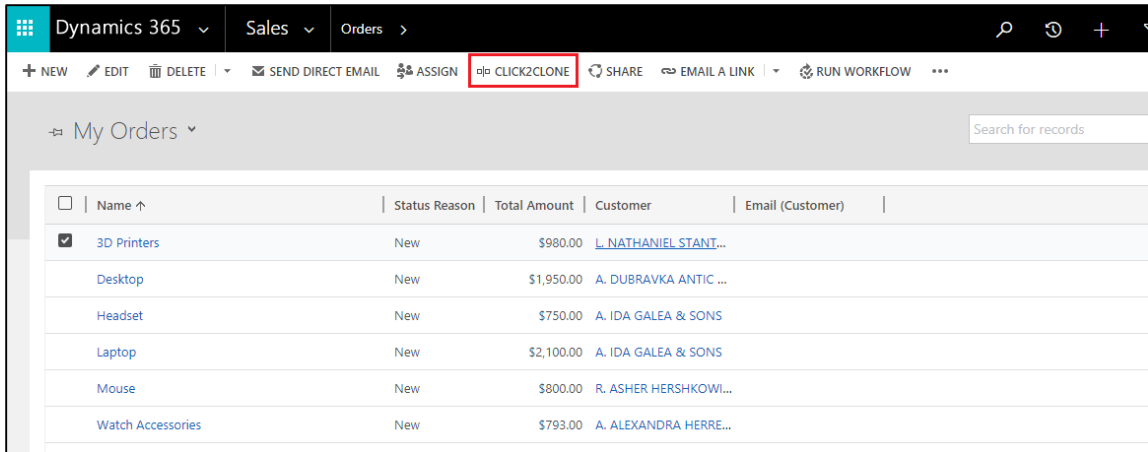
Consider **'Sales'** as the area/group and **'Orders'** as the entity.

1. Navigate to **'Main'** -> **'Sales'** -> **'Orders'**

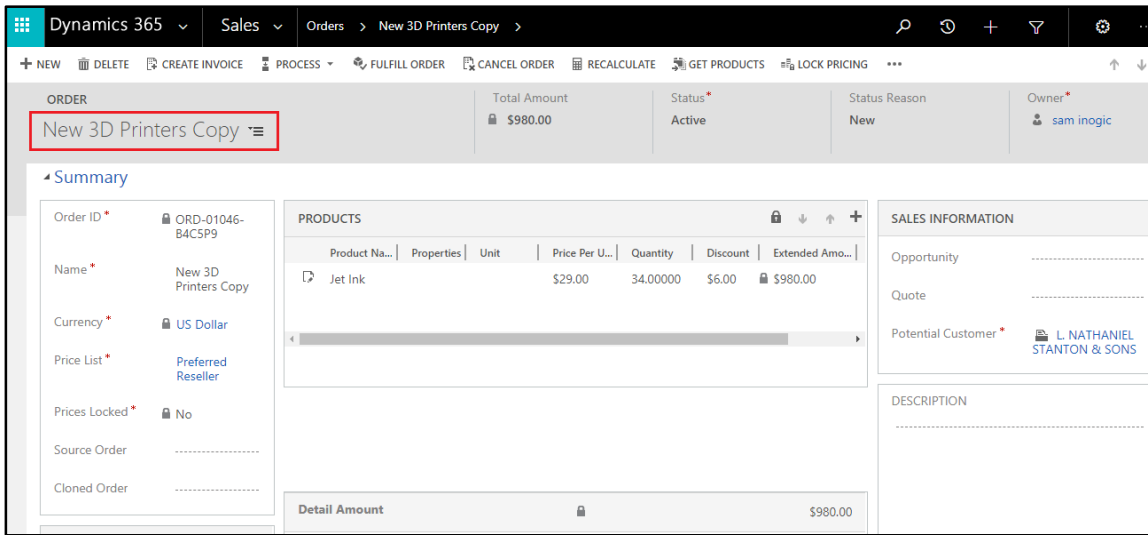


2. Select any view from the drop down list. Here **'My Orders'** has been selected. Then select the record to be cloned and click **'Click2Clone'**.

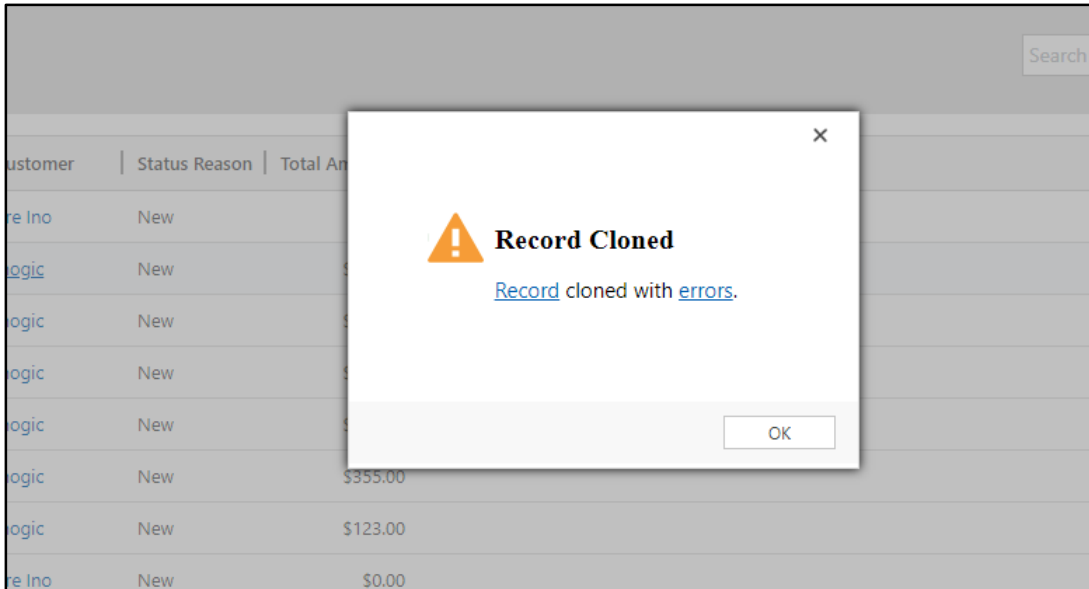
Click2Clone–User Manual



3. Once the record is cloned, the new record is displayed on the screen if there are no errors while cloning. Alternatively you can clone the record using a workflow using 'Run Workflow'.



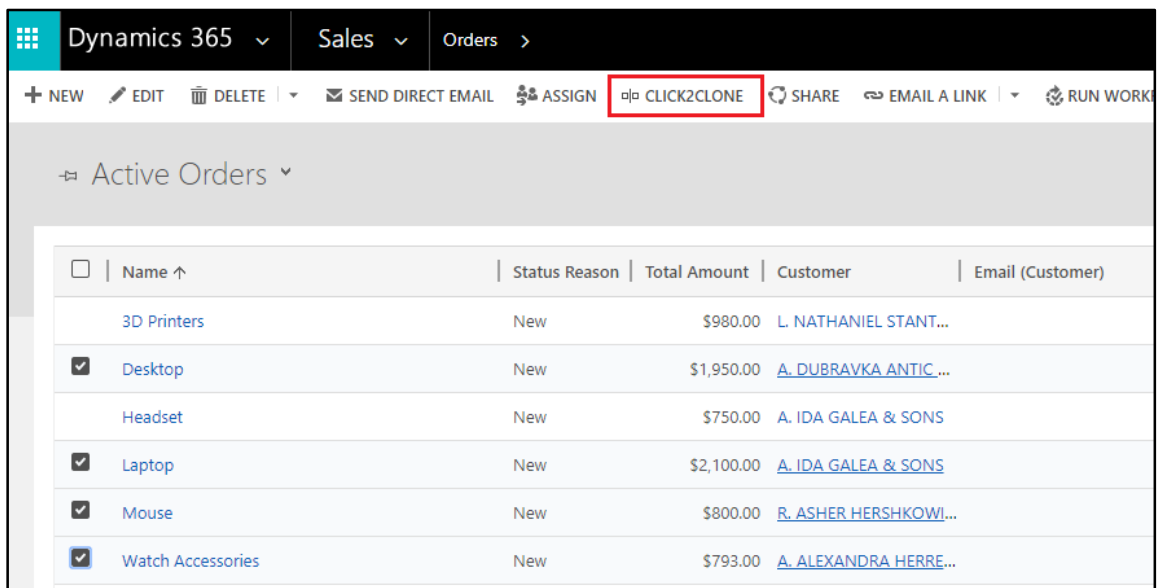
4. If there are any errors while cloning, then popup is shown, as seen in the below screenshot. On click of **Record** newly cloned record is opened and on click of **errors** it will navigate to **Click2Clone Error Log**, where you can see error list.



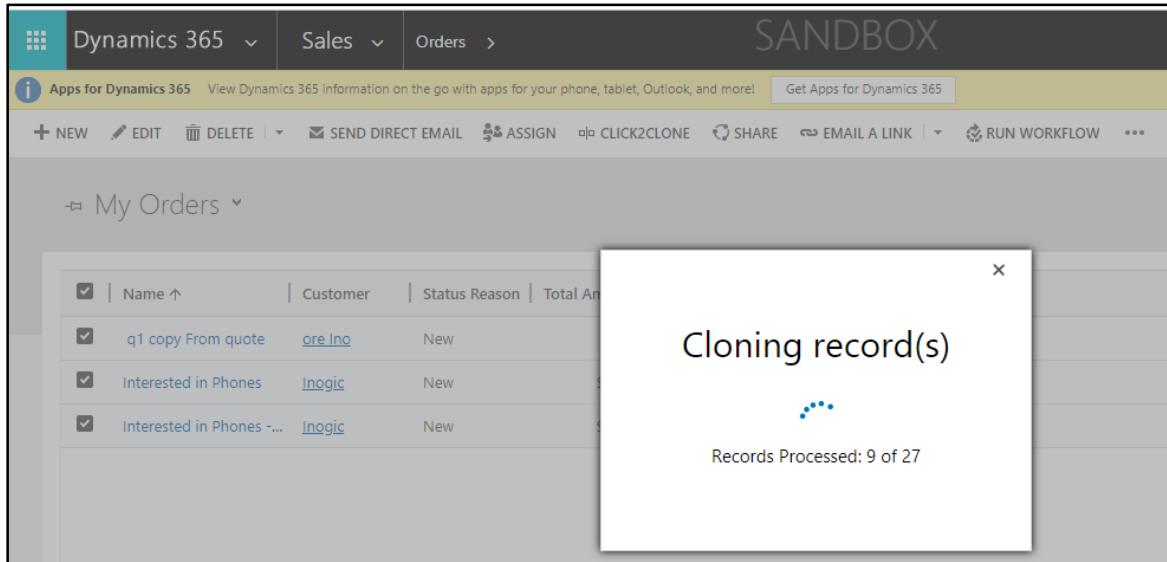
Click2Clone for Multiple Records from the Home Page

Let us consider **'Orders'** as the entity and **'Active Orders'** as the view.

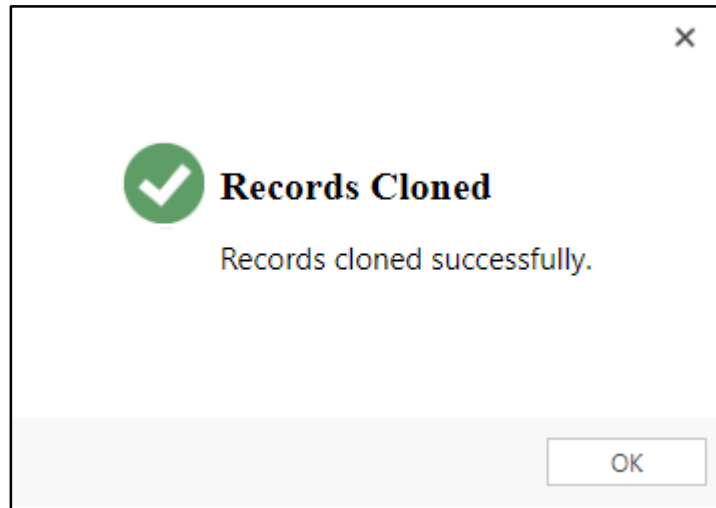
1. Select multiple records from the view and click **'Click2Clone'** button.



2. While the cloning is in progress, a message **'Cloning record'** gets displayed.



3. Once cloning is complete, a message **'Record cloned successfully'** is displayed on the screen.



5. Click **'Refresh'** on the grid to view the cloned records in the list of **'Active Orders'**. Alternatively you can clone the records using **'Run Workflow'**.

Click2Clone–User Manual

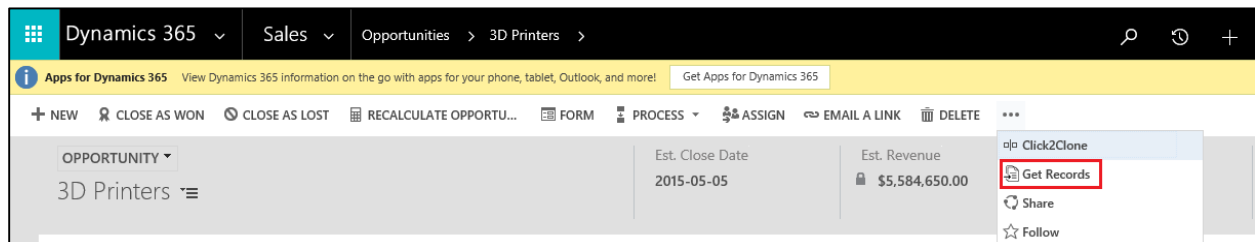
Active Orders ▾					
<input type="checkbox"/>	Name ↑	Status Reason	Total Amount	Customer	Email (Customer)
	Desktop	New	\$1,950.00	A. DUBRAVKA ANTIC ...	
	Headset	New	\$750.00	A. IDA GALEA & SONS	
	Laptop	New	\$2,100.00	A. IDA GALEA & SONS	
	Mouse	New	\$800.00	R. ASHER HERSHKOWI...	
	New Desktop Copy	New	\$1,950.00	A. DUBRAVKA ANTIC ...	
	New Laptop Copy	New	\$2,100.00	A. IDA GALEA & SONS	
	New Mouse Copy	New	\$800.00	R. ASHER HERSHKOWI...	
	New Watch Accessories Copy	New	\$793.00	A. ALEXANDRA HERRE...	
	Watch Accessories	New	\$793.00	A. ALEXANDRA HERRE...	

Get Records

Get Records functionality brings 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.

For Get Records button to show up for an Entity, we need to create a Click2Clone Template for it and the user needs to have Click2Clone Administrator or Click2Clone User role.

Note: The idea is same like what we have for Click2Clone button.



It'd look something like above.

On click of Get Records, below UI would be shown.

Get Record(s)

Please select relationship(s) to get the records

Select Template: opportunity

Select Relationship(s): × Opportunity_Appointments, × Opportunity_Emails

Select Source Record: Audio Equipment

OK Cancel

Select Template: This is where the user will have to select which Click2Clone Template they want to proceed ahead with. If there is only one template, then we select it by default. But, if there are multiple templates, the user has to choose as per the requirement. Also, we show all the templates created for the current entity, except for “One to Another” templates.

Select Relationship(s): Based on the template selected above, all the selected 1:N and N:N relationship would be available for selection. User can select either one relationship or multiple relationships.

Select Source Record: This is where the user would have to select the Source Record.

On click of **OK**, all the selected relationship’s child records would be cloned over to the Destination Record

Note: Get Records would always consider the currently opened record as the Destination Record.

Contact Us

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