Clone Record Pro Solution

Overview of the Clone Record Pro Solution:

The Clone Record professional solution allows the business user to create multiple clone records (up to 10) of existing record in just a Single Click in Microsoft D365 Customer Engagement. It supports all entities (system and custom entities).
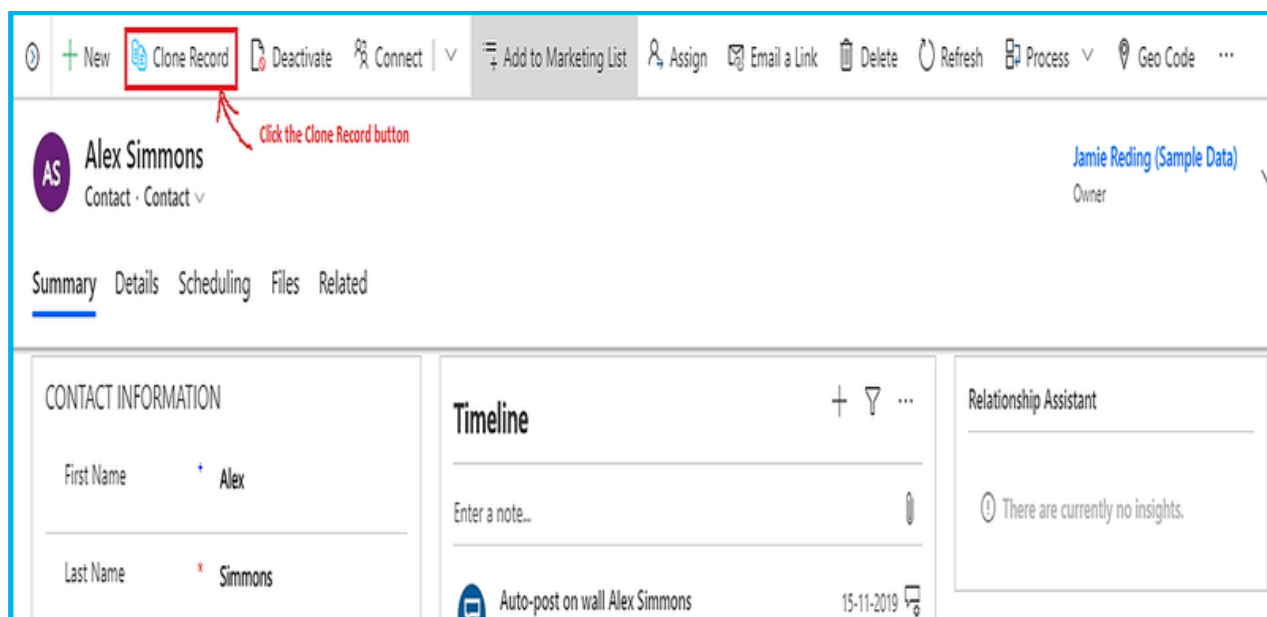
The Solution saves effort and time in manually copying and replicating the fields by any of the following commonly used methods:

1. Copy field by field from existing record to new record.
2. Export all the fields of existing record using excel, copy to new line and import the saved data file (excel) to CRM using the Import data.

The solution is intended to increase productivity for customers and users who want to clone records for specific needs in the MS D365 CRM, like Leads, Opportunities, Quotes, etc.
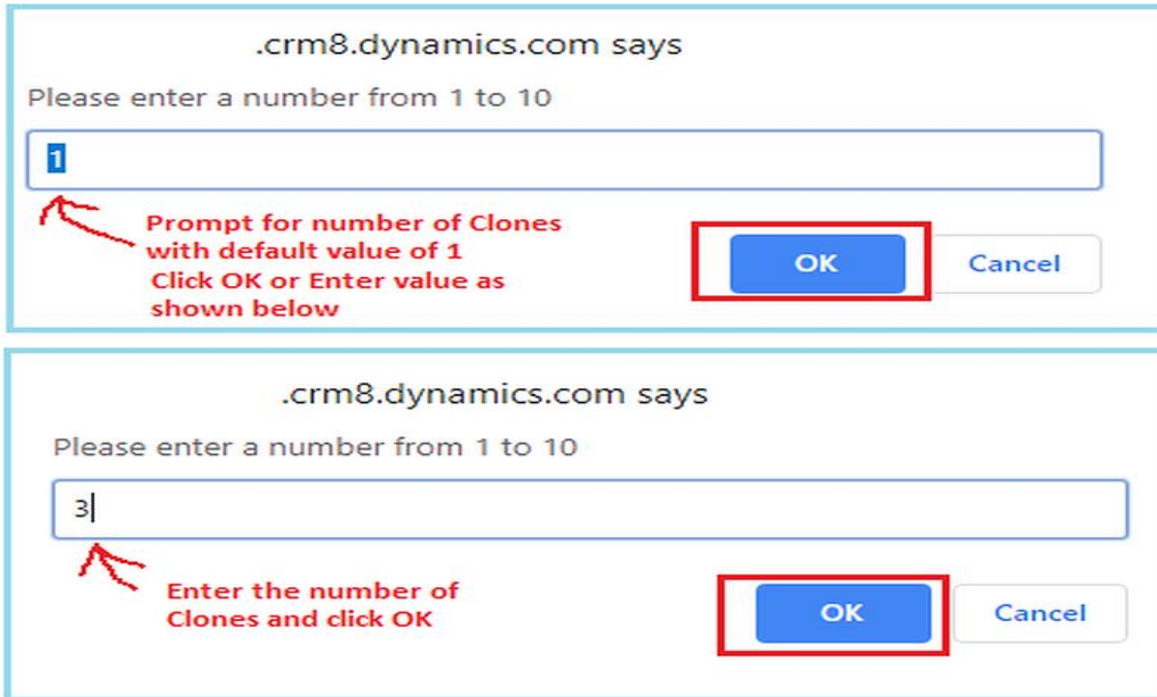
Screenshots and usage:

The Clone Record button will be available in all the entities once the solution is installed. The user needs to click on the Clone Record button.

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User will be prompted with number of clones to be created, with default value set to 1 as shown in screenshot below. User to either enter the number and then click OK or click OK to create a single clone record.

During the processing of clone, there will be a wait message shown as below.

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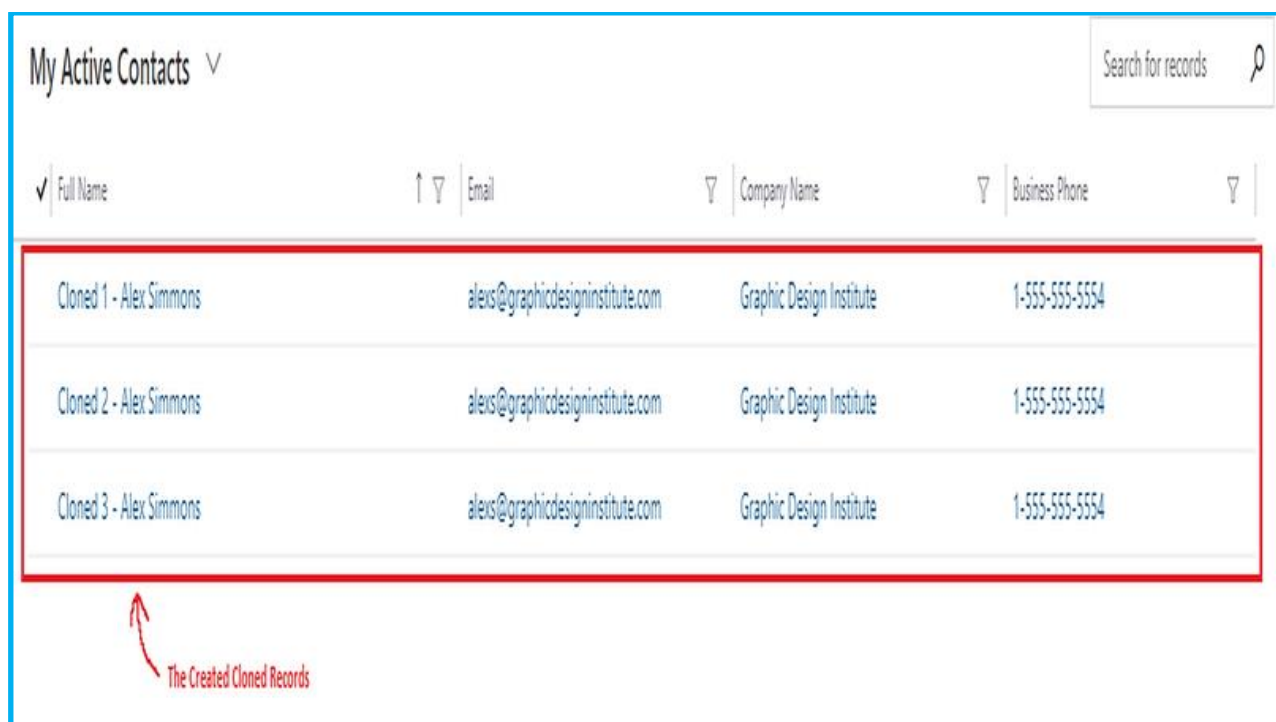
Once the clone record or records are created, a window will popup with the confirmation message to display the success message. If any error, that will also be displayed.
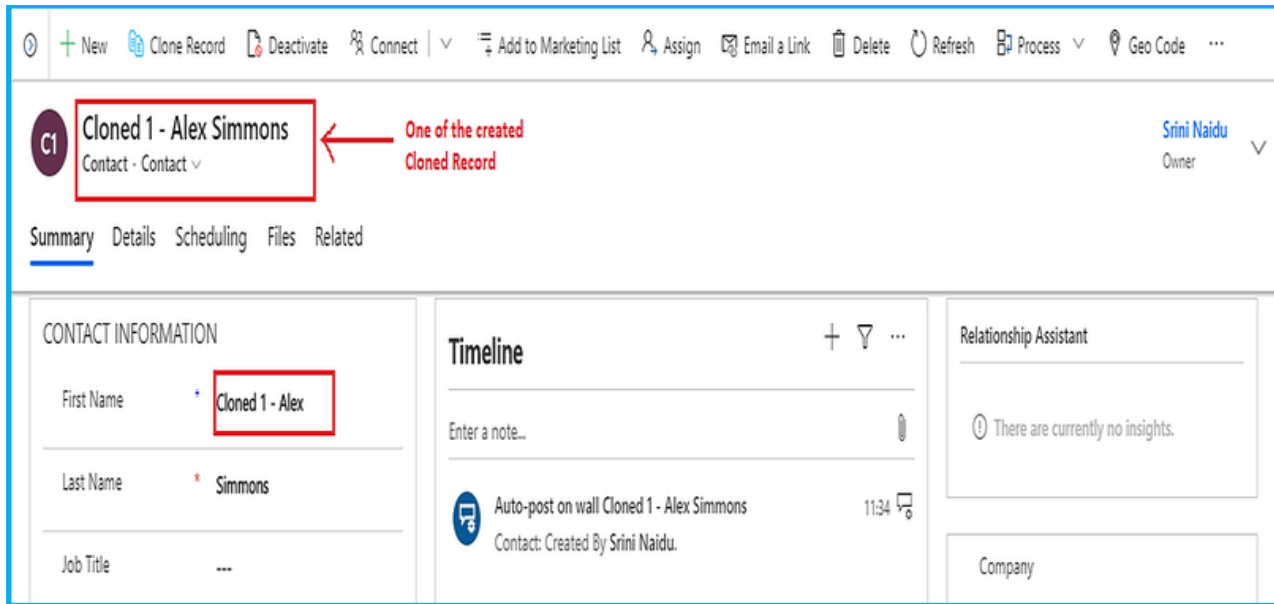

The User can navigate to My Active (Records) or Active Records and see the Cloned record(s) created.
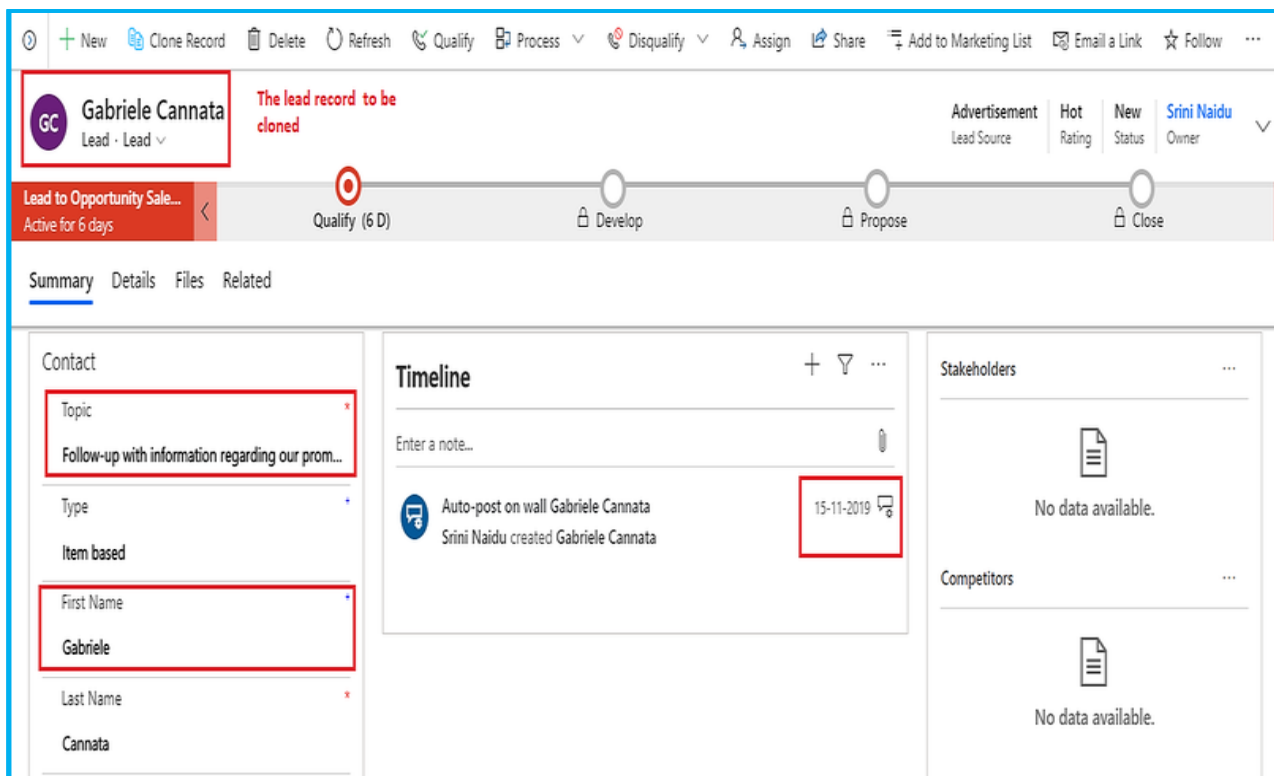
The user can open the cloned record and start working on it.

Couple of more screenshots from other entities:

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Cloned records created

One of the Lead Cloned Record

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Dependencies:

N/A

Future Enhancements:

1. Business Process Flow will be included so that the cloned records will be at the same stage of the record used to create the clone if the entity is enabled for BPF and has a BPF.
2. Option to create associated entities at one level deeper. This will be made configurable so that it can be set by system administrators.
   Example Use Cases:
   I. When creating clone account, related contacts or leads or opportunities created.
   II. When creating clone opportunity or quote or order, related opportunity products, or quote products or order products created respectively.

Known Issues:

The button does not get removed completely when the solution is un-installed. This is a known Microsoft bug reported [here](#).

Workaround:

- Export any unmanaged solution with Application ribbons added to it.

- Open customizations.xml

- Find the button/flyout you want to hide. (In our case the button is **"ps.ApplicationRibbon.{!EntityLogicalName}.CloneRecordButton.CloneRecord"**)

   Instead of removing the button/flyout, go to the definition of the command for the button/flyout

- In the command definition, under Enable Rules, add

   <EnableRule Id="Mscrm.Disabled" />

Ref for the workaround is provided [here](#).

Please feel free to reach out to us in case of any queries, suggestions and issues: info@pramitisoft.in