



## White Paper

## 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 through workflow and also update values of the new cloned record further
- 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
- Set Rules to select records for cloning
- Support to create multiple copies of any given record

### Supported Versions

**Versions:** Microsoft Dynamics CRM 2013 and above.

**Deployment Models:** On-Premise, Online and IFD.

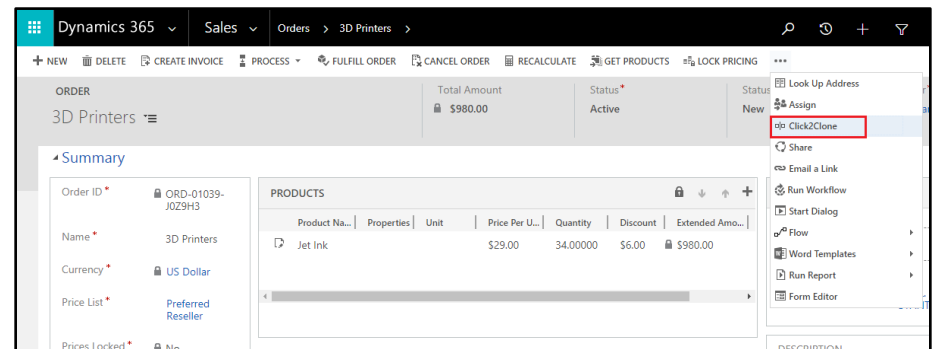
### Who needs it?

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

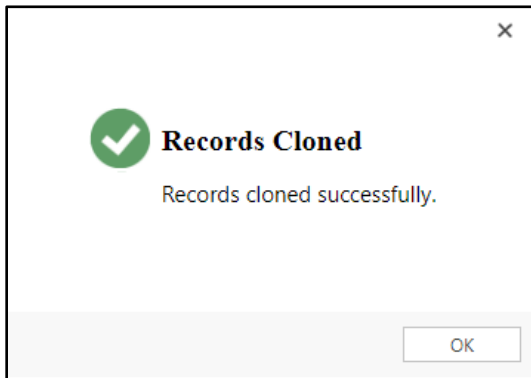
'Click2Clone' can be easily accessed from the ribbon on the form as well as on the ribbon in the entity home page



### Bulk Cloning for multiple records

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

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### Click2Clone Template Configuration

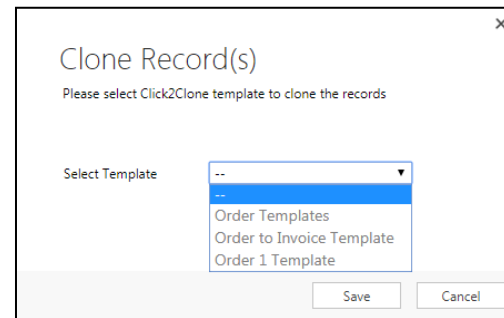
The Click2Clone template enables the user to select attributes and relationships to be carried over when the record is being cloned. You have the flexibility of creating multiple templates per entity.

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

A form titled "CLICK2CLONE TEMPLATE" with a subtitle "New Click2Clone Template". It has a "General" section with two columns: "Source & Target Entity Details" and "Configuration". The first column has fields for "Name" (set to "Order Template"), "Source Entity Name" (set to "salesorder"), and "Target Entity Name". The second column has fields for "Prefix" and "Suffix". Below this is an "Attributes/Relationships To Clone" section with two tabs: "Attributes" and "Relationships". The "Attributes" tab shows a table with columns "Schema Name", "Logical Name", and "Type". The "Relationships" tab shows a table with columns "Schema Name" and "Type".

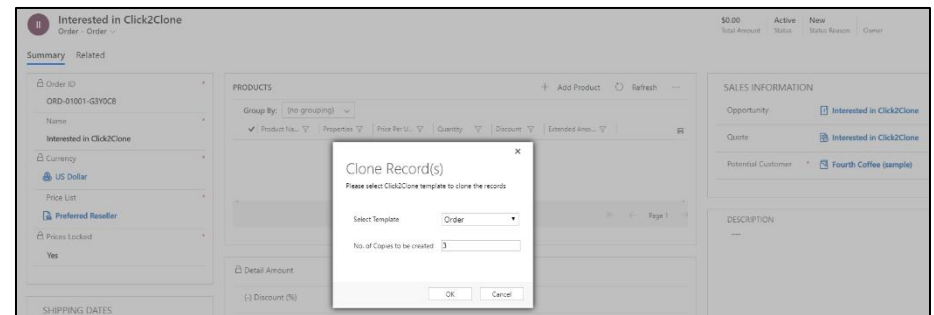
### Easy shortcuts for cloning

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.



### Support Multiple Copies

Click2Clone enables user to create multiple copies of a given entity record at one go.



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### 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.

The screenshot shows the 'CLICK2CLONE TEMPLATE' configuration window for 'Order Templates'. It has a top bar with icons for NEW, DEACTIVATE, DELETE, ASSIGN, SHARE, EMAIL A LINK, RUN WORKFLOW, START DIALOG, and FLOWS. The main area is divided into sections: 'General' with 'Source & Target Entity Details' (Name: Order Templates, Source Entity Name: salesorder, Target Entity Name: ) and 'Configuration' (Prefix: New, Suffix: Copy). Below is 'Set References' with 'Source Entity Field' set to 'new\_donedorder' and 'Target Entity Field' set to 'new\_parentorder'. At the bottom is 'Attributes/Relationships To Clone' with a table for attributes.

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.

The screenshot shows a record titled 'New Desktop Copy' with a total amount of £17,850.00 and status 'Active'. The 'Summary' section shows 'Order ID: ORD-01013-YB8H4', 'Name: New Desktop Copy', 'Currency: Pound Sterling', 'Price List: Default Price List', and 'Prices Locked: No'. The 'PRODUCTS' table lists 'Mouse' and 'Monitor'. The 'SALES INFORMATION' section shows 'Opportunity: 4G Enabled Tablets', 'Quote: Quote for Cooling fan', and 'Potential Customer: J. WU (WOODY) CHEN & SONS'. The 'DESCRIPTION' section is empty. At the bottom, 'Parent Order' is 'Desktop' and 'Cloned Order' is 'New New Desktop Copy'.

### Set Rules for Selecting Records

Click2Clone supports the feature to set rules for selecting records. Users can select necessary records for cloning based on Simple or Advanced Rule Mode.

**Simple Rule Mode:** It is based on the View of an entity.

The screenshot shows the 'Set Rules for Selecting Records' dialog. 'Rule Mode' is set to 'Simple'. 'View' is a dropdown menu with options: '--Select--', 'My Orders' (selected), 'My Sales Contracts', and 'All Orders'.

**Advanced Rule Mode:** It is based on filter criteria or conditions defined by Fetch XML.

The screenshot shows the 'Set Rules for Selecting Records' dialog. 'Rule Mode' is set to 'Advanced'. 'Fetch XML' is a text area containing the code: '<fetch version="1.0" output-format="xml-platform"'. There is a 'Potential Customer' field with the name 'J. WU (WOODY) CHEN & SONS'.

### 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.

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OPPORTUNITY: Audio Equipment

Est. Close Date: 4/20/2017, Est. Revenue: \$8,710,785.00, Probability: 60

Process: Propose (Active for 8 days)

Summary:

Topic	Audio Equipment
Account	Wide World Importers
Currency	US Dollar
Description	

ACTIVITIES: sam inogic Regarding set up and configuration of Audio Equipment (Yesterday)

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

PROJECT: INFORMATION: Audio Equipment - Copy

Due Date, Estimated Labor Cost, Cost Consumption %, Progress %: 0.00

Process: New (Active for...) Quote Plan Deliver Complete Close

Summary:

Name	Audio Equipment - Copy
Description	Cloned from Opportunity
Customer	
Calendar template	Default Work Template
Currency	US Dollar

ACTIVITIES: sam inogic Regarding set up and configuration of Audio Equipment (Yesterday)

### 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.

General Administration Notes

Process Name: Click2Clone

Entity: Order

Category: Workflow

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)

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.

Select this row and click Add Step.

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.

Process: Click2Clone

Information

Common

- Information
- Audit History

Process Sessions

Process Sessions

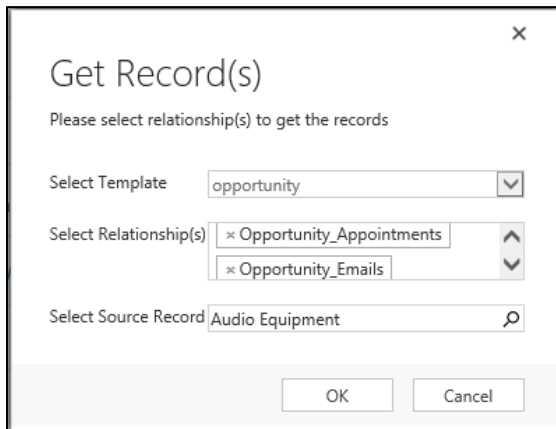
Update newly created record

Update: Clone Order

### 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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Get Record(s)

Please select relationship(s) to get the records

Select Template: opportunity

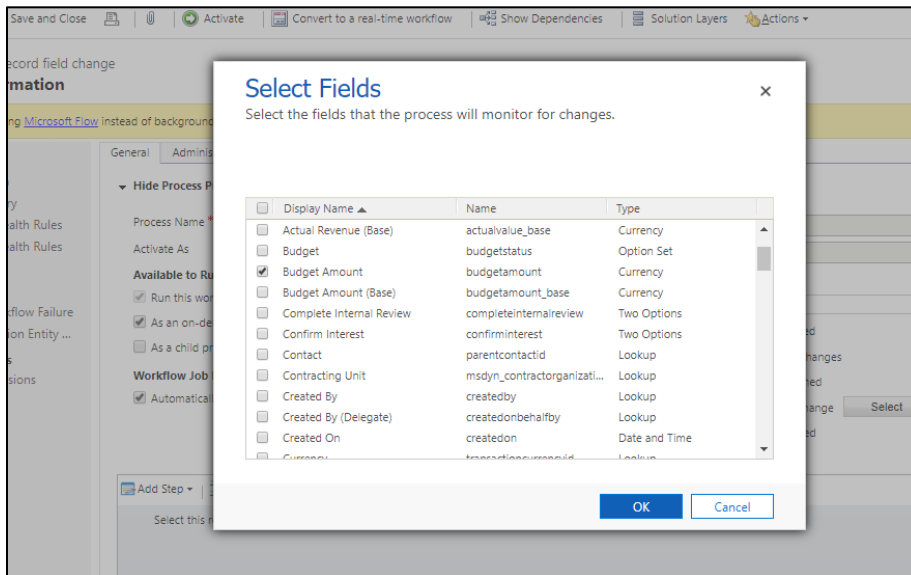
Select Relationship(s): \* Opportunity\_Appointments, \* Opportunity\_Emails

Select Source Record: Audio Equipment

OK Cancel

### Clone Multiple Copies Workflow

Click2Clone enables the user to clone multiple copies of records just by updating any of the selected fields within the chosen entity record.

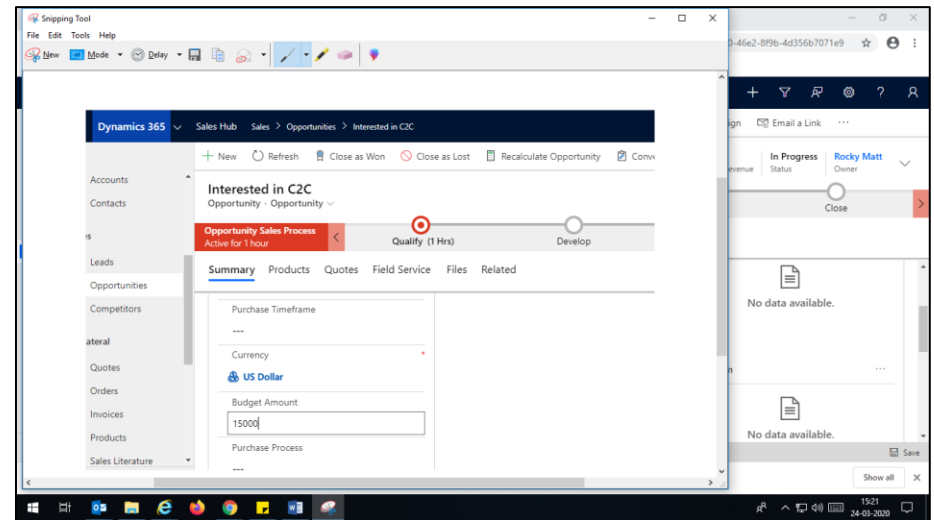


Select Fields

Select the fields that the process will monitor for changes.

Display Name	Name	Type
<input type="checkbox"/> Actual Revenue (Base)	actualvalue_base	Currency
<input type="checkbox"/> Budget	budgetstatus	Option Set
<input checked="" type="checkbox"/> Budget Amount	budgetamount	Currency
<input type="checkbox"/> Budget Amount (Base)	budgetamount_base	Currency
<input type="checkbox"/> Complete Internal Review	completeinternalreview	Two Options
<input type="checkbox"/> Confirm Interest	confirminterest	Two Options
<input type="checkbox"/> Contact	parentcontactid	Lookup
<input type="checkbox"/> Contracting Unit	msdyn_contractorganizati...	Lookup
<input type="checkbox"/> Created By	createdby	Lookup
<input type="checkbox"/> Created By (Delegate)	createdonbehalfby	Lookup
<input type="checkbox"/> Created On	createdon	Date and Time
<input type="checkbox"/> Currency	currencycode	Lookup

OK Cancel



Dynamics 365 Sales Hub Sales > Opportunities > Interested in C2C

Interested in C2C

Opportunity Sales Process: Active for 1 hour

Quality (1 Hrs)

Develop

Summary Products Quotes Field Service Files Related

Purchase Timeframe

Currency: US Dollar

Budget Amount: 15000

Purchase Process

### Contact Us:

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