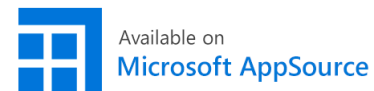




**Automate or Click to Clone
records including related
child records in a single click**



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Key Features

Configurable

Easy to configure with the ability to select the fields to be carried over along with the prefix and suffix to be added for cloned records.

Deep Copy

Ability to carry over related records from 1:N & N:N relationships.

Automation

Ability to clone records with Workflow along with data update in new cloned record.

Bulk Copy

Quickly clone multiple records at a time.

Set References

Store reference of the source record on the cloned record and vice versa.

Copy to Another Entity Type

Copy details & relationships from one entity type record to another.

Get Records

Copy only related records from another record.

Support Multiple copies

At a time create multiple copies of entity records with ease

Define Criteria

Define rules for copying related entity records

Available For

SUPPORTED VERSIONS

- MICROSOFT DYNAMICS CRM 2016 AND ABOVE

DEPLOYMENTS

- ON-PREMISES
- Dynamics 365 ONLINE

Ease Of Access From Ribbon On Form and Entity Home Page

The screenshot shows the Dynamics 365 Sales Hub interface. The top navigation bar includes 'Dynamics 365', 'Sales Hub', and 'Sales > Orders > Interested in iPhone'. The left sidebar shows navigation options like 'Collateral', 'Quotes', 'Orders', 'Invoices', 'Products', 'Sales Literature', 'Marketing', 'Marketing Lists', and 'Quick Campaigns'. The main area displays the 'Interested in iPhone' form with a 'Summary' tab selected. The 'Summary' tab shows the 'Order ID' as 'ORD-01002-R9K0M8' and the 'Currency' as 'US Dollar'. The 'PRODUCTS' section shows a table with columns: 'Product', 'Property', 'Price Per Unit', 'Quantity', 'Discount', and 'Extend'. The table contains two rows: 'Concret...' with a price of \$10.00 and quantity of 1.00000, and 'iPhone 6S' with a price of \$250.00 and quantity of 1.00000. The 'Click2Clone' button is highlighted in the ribbon, and a tooltip is visible showing the text 'Click here to clone this record'.

The screenshot shows the Dynamics 365 Sales Hub interface for the 'My Orders' entity home page. The top navigation bar includes 'Dynamics 365', 'Sales Hub', and 'Sales > Orders'. The left sidebar shows navigation options like 'Collateral', 'Quotes', 'Orders', 'Invoices', 'Products', 'Sales Literature', 'Marketing', 'Marketing Lists', and 'Quick Campaigns'. The main area displays the 'My Orders' entity home page with a table of orders. The table has columns: 'Name', 'Customer', 'Status Reason', and 'Total Amount'. The table contains two rows: 'Interested in iPhone' with a total amount of \$260.00, and 'Order for AtomLife Solutions Pvt. Ltd.' with a total amount of \$1,940.00. The 'Click2Clone' button is highlighted in the ribbon, and a tooltip is visible showing the text 'Click here to clone this record'.

Store References

Interested in iPhone -Copy

Summary

Accounting Details

Details

Related

Name

Interested in iPhone -Copy

Currency

US Dollar

Price List

US Price List

Prices Locked

No

Source Order

Interested in iPhone

✓

Product ...

Prope...

Price Pe...

Quantity

Disco...

Extende

Concret...

Not C...

\$10.00

1.00000

iPhone 6S

Not C...

\$250.00

1.00000

Interested in iPhone

Quote

Interested in iPhone

Order: Order

Interested in iPhone

Total Amount

\$260.00

Status

Active

Summary

Accounting Details

Details

Related

Name

Interested in iPhone

Currency

US Dollar

Price List

US Price List

Prices Locked

Yes

Source Order

Cloned Order

Interested in iPhone -Copy

✓

Product ...

Prope...

Price Pe...

Quantity

Disco...

Extende

Concret...

Not C...

\$10.00

1.00000

\$

iPhone 6S

Not C...

\$250.00

1.00000

\$2

Interested in iPhone

Quote

Interested in iPhone

Potential Customer

Inogic India Pvt Ltd

Detail Amount

\$260.00

(-) Discount (%)

(-) Discount

Pre-Freight Amount

\$260.00

DESCRIPTION

Bulk Copy

My Orders ▾

Search for records 🔍

✓	Name	↑ ▾ Customer	▾ Status Reason	▾ Total Amount
	Interested in iPhone		New	\$260.00
✓	Interested in iPhone -Copy		New	\$260.00
✓	Order for AtomLife Solutions Pvt. Ltd.		New	\$1,940.00

**Records Cloned**
Records cloned successfully.

Support Multiple Copies

||

Interested in Click2Clone

Order · Order ▾

Summary

Related

Order ID

ORD-01001-G3Y0C8

Name

Interested in Click2Clone

Currency

US Dollar

Price List

Preferred Reseller

Prices Locked

Yes

SHIPPING DATES

PRODUCTS

+

Add Product

↺

Refresh

⋮

Group By:

(no grouping) ▾

✓

Product Na...

▾

Properties ▾

Price Per U... ▾

Quantity ▾

Discount ▾

Extended Amo... ▾

⌵

Detail Amount

(-) Discount (%)

\$0.00

Total Amount

Active

Status

New

Status Reason

Owner

SALES INFORMATION

Opportunity

Interested in Click2Clone

Quote

Interested in Click2Clone

Potential Customer

* Fourth Coffee (sample)

DESCRIPTION

...

Clone Record(s)

Please select Click2Clone template to clone the records

Select Template

Order ▾

No. of Copies to be created

3

OK

Cancel

Copy to another record type

Opportunity: Opportunity ▾
Interested in iPhone

Est. Close Date
9/1/2019

Project Service - Opport...
Active for 9 days

Qualify (9 D)

Propose

Contract

Close

Summary Product line items Quotes Related

Topic
Interested in iPhone

Contact
Sam Inogic

Account
Inogic India Pvt Ltd

Purchase Timeframe

Timeline

Enter a note...

TODAY

Auto-post on wall Interested in iPhone
Minutes ago

Sam Inogic won Opportunity for Inogic India Pvt Ltd: \$260.00. Congratul...

Selected Opportunity

Cloned Project

PROJECT
Interested in iPhone -copy

Due Date

Summary Schedule Team Resource Assignments Resource Reconciliation Estimates Tracking Status Sales ...

General

Name * Interested in iPhone -co...

Description Iphone

Customer ---

Calendar template * Default Work Templ...

Currency * US Dollar

Source Opportunity Interested in iPhone

Estimates

Estimated Start Date

Estimated Finish Date

Estimated Hours
0.00

Estimated Labor Cost
\$0.00

Estimated Expense Cost

Actuals

Actual Start
9/1/2019

Actual End

Actual Hours
0.00

Actual Labor Cost

Actual Expense Cost

Copy only related records from another record

The screenshot displays a CRM interface with a modal dialog box titled "Get Record(s)". The dialog prompts the user to "Please select relationship(s) to get the records". It contains three input fields: "Select Template" with a dropdown menu showing "opportunity", "Select Relationship(s)" with a text input showing "× product_opportunities", and "Select Source Record" with a text input showing "Home Electronic System...". At the bottom of the dialog are "OK" and "Cancel" buttons.

The background interface shows the "Opportunity: Opportunity" record for "Home Electronics". The top navigation bar includes buttons for "New", "Refresh", "Close as Won", "Close as Lost", "Recalculate Opportunity", "Convert to Work Order", "Process", "Assign", and a menu icon. The "Opportunity Sales Process" is shown as "Active for 16 days". The "Summary" tab is selected, displaying fields for "Topic", "Contact", "Account", and "Purchase Timeframe". The "Relationship Assistant" section indicates "There are currently no insights." The "STAKEHOLDERS" section lists "Eva Corets" with a "Stake" role.

Automation and Update the Cloned record with Click2Clone Workflow

The screenshot displays the Click2Clone Workflow configuration interface, which is divided into several sections:

- Common:** Includes links to Information, Audit History, Solution Health Rules, Notify Workflow Failure, and User Adoption Entity ...
- Process Sessions:** Includes a link to Process Sessions.
- General:** Contains the following settings:
 - Process Name *: Click2Clone Opportunity to Project
 - 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 (with a Select button)
 - ☐ Record is deleted
- Steps:**
 - Call workflow to clone records (Inogic.Click2Clone.Automation (1.0.0.0):Inogic.Click2Clone.Automation.CloneRecords)
 - Wait for 1 minute
 - Timeout until 1 Minute then
 - Update newly created project record (Update: Cloned Project, with a Set Properties button)
- Select Fields Dialog:** A modal window titled "Select Fields" with the instruction "Select the fields that the process will monitor for changes." It contains a table with columns "Display Name", "Name", and "Type". The table lists various fields, with "Budget Amount" and "Budget Amount (Base)" selected. The "OK" button is highlighted.
- Summary:** A section titled "Process: Click2Clone Opportunity to Project" and "Update Project" containing a form with the following fields:
 - General: Project Template, Name, Description, Customer, Calendar template, Currency, Source Opportunity, Contracting Unit, Project Manager, Overall Project Status.
 - Estimates: Estimated Start Date, Estimated Finish Date, Estimated Hours, Estimated Labor Cost, Estimated Expense Cost, Estimated Total Cost.
 - Actuals: Actual Start (highlighted with a red box and containing the formula {Actual Close Date(Opportunity)}), Actual End, Actual Hours, Actual Labor Cost, Actual Expense Cost, Actual Total Cost.

Click2Clone Template Configuration

Click2Clone

Click2Clone > Click2Clone Templates > Order

New

Deactivate

Delete

Refresh

Assign

Share

Email a Link

Flow

Word Templates

Run Report

Order

Click2Clone Template

Jenny Smith

Owner

General

Attribute/Relationships to Clone

Advanced Configuration

Child Template

Related

Source & Target Entity Details

Name

*

Order

Source Entity Name

*

Order

Target Entity Name

--Select--

Configuration

Prefix

Suffix

- Copy

Multiple Copies Configuration

Number of copies to be created

100

Allow default edit

Yes

Begin Number

1

Suffix Length

3

Active

Save

Attribute/Relationships To Clone

General **Attribute/Relationships to Clone** Advanced Configuration Child Template Related

Attributes

☒	Schema Name	Logical Name	Type
☒	BillTo_City	billto_city	String
☒	BillTo_ContactName	billto_contactname	String
☒	BillTo_Country	billto_country	String
☒	BillTo_Fax	billto_fax	String
☒	BillTo_Line1	billto_line1	String
☒	BillTo_Line2	billto_line2	String
☒	BillTo_Line3	billto_line3	String
☒	BillTo_Name	billto_name	String

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Relationships

☐	Schema Name	Relationship Type
☐	SalesOrder_ActivityPointers	OneToManyRelationship
☒	SalesOrder_Annotation	OneToManyRelationship
☐	SalesOrder_Appointments	OneToManyRelationship
☐	SalesOrder_AsyncOperations	OneToManyRelationship
☐	SalesOrder_BulkDeleteFailures	OneToManyRelationship
☒	SalesOrder_Emails	OneToManyRelationship
☒	SalesOrder_Faxes	OneToManyRelationship
☐	SalesOrder_Letters	OneToManyRelationship

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Supported Relationships

Schema Name	Relationship Type
SalesOrder_ActivityPointers	OneToManyRelationship
SalesOrder_Annotation	OneToManyRelationship
SalesOrder_Appointments	OneToManyRelationship
SalesOrder_AsyncOperations	OneToManyRelationship
SalesOrder_BulkDeleteFailures	OneToManyRelationship
SalesOrder_Emails	OneToManyRelationship
SalesOrder_Faxes	OneToManyRelationship
SalesOrder_Letters	OneToManyRelationship

Click2Clone Supports
1:N Relationships

Schema Name	Relationship Type
contactinvoices_association	ManyToManyRelationship
contactquotes_association	ManyToManyRelationship
contactorders_association	ManyToManyRelationship
contactleads_association	ManyToManyRelationship

Click2Clone Supports
N:N Relationships

Next Steps

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