**Clone Records with Hierarchy Accelerator**

**User Manual**

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# Steps for Administrator to configure accelerator

1. Install the "CloningSPMC" solution on required CRM instance.
2. Import the Configuration data provided in the .csv file by name "MasterData.xml"
3. Select any one entity from **Entity Configuration** form to activate that entity for cloning.
4. Create **Parent Configuration** record by adding attributes which are required in cloned record.
5. Add **Child Entity** association if required from the same form by clicking **"+"** button.
6. Select attributes to clone in child form that shows as a popup.
7. Save the child record.

# Steps for User to clone a record

1. Go to entity for which cloning is configured by the CRM Admin.
2. Click on "**Clone**" button to clone the record and confirm on the alert message shown (this is required to prevent accidental clicks on button that can cause cloning).
3. Check the cloned record in the view on the same entity.

# Security role

Provide below privileges to the User(s) who will perform the cloning operation:

|  |  |  |  |
| --- | --- | --- | --- |
| Entity Name / Privilege | **Read** | **Create** | **Write** |
| **Entity Configuration** | Y |  |  |
| **Cloning Log Error** | Y | Y | Y |
| **Parent Cloning Configuration** | Y |  | Y |
| **Child Cloning Configuration** | Y |  |  |
| **Solution** | Y |  |  |
| **Master Clone Configuration** | Y |  |  |

Frequently Asked Questions

* **Can we include custom entities for Record cloning?**

Yes, Cloning accelerators support all CRM provided customizable and user created custom entities. Only system entities cannot be included for Record Cloning.

* **Can we track all attributes for cloning?**

Record Cloning accelerators can include all attributes (apart from system attributes like createdon, modifiedon etc.) of selected entity while creating a clone. These attributes are available for admin to configure for individual entities as required. In case you require some other events to be included in Timeline accelerator please contact Mindtree Support Team and place your request.

* **Can we clone the complete hierarchy of data (i.e. linked data)?**

Yes, **Record** **Cloning**  accelerator has three versions available on Microsoft AppSource. Please ensure you install, configure and run the required version for getting the intended feature:

1. **Record Cloning**: On the record page for which admin has configured the cloning, click **Clone** buttonto clone that record.
2. **Record Cloning with Hierarchy**: On the record page for which admin has configured the cloning, click **Clone** buttonto clone the complete downwards hierarchy.

**Note: Cloning operation will pick the child entities as configured by admin.**

1. Record Bulk Cloning: User can select up to 10 records on the entity view and click **Clone** button to clone all at once.
* **What is cloning process throws error?**

In rare scenarios, if cloning processes throws exception, CRM will notify admin by creating an **Error Log** record on **Clone Error Dashboard.** Admin will therefore be able to see the error details inside this record and take corrective action accordingly.

* **How can I see custom entities included in the Cloning accelerator?**

The cloning accelerator creates four custom entities in the CRM instance on which it is deployed. These are:

1. Entity Configuration
2. Cloning Log Error
3. Parent Cloning Configuration
4. Master Clone Configuration
5. Child Cloning Configuration

These entities are accessible under Settings > Extensions. In case these are not visible under this expected area, please activate them to appear there by using below steps (CRM Administrator or Customizer role can only perform these steps):

1. Go to Settings > Solutions > ‘Record Cloning’ solution
2. Open ‘Record Cloning’ accelerator
3. Go to Entities
4. Select any of the entity mentioned in above list
5. In the section, **‘Areas that display this entity’** check **‘Settings’** checkbox.
6. Repeat step 4 and 5 for all four entities.

* **Whom can we contact for further queries or changes required in Timeline solution?**

For any query, please write to our mailbox - MSDynamics.CoE@mindtree.com