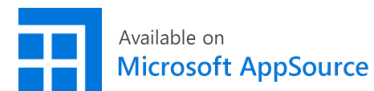




**Automate or Click to Clone
records including related
child records in a single click**



crm@inogic.com



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 365 8.2 & Above
- Dataverse (Power Apps)

DEPLOYMENTS

- On-Premises
- Online

Ease Of Access From Ribbon On Form and Entity Home Page

This screenshot shows the Dynamics 365 Sales Hub interface for an order form titled "Interested in iPhone". The ribbon menu is open, displaying various actions such as "New", "Promote", "Delete", "Refresh", "Create Invoice", "Process", "Fulfill Order", "Cancel Order", "Recalculate", and "Look Up Address". A sub-menu for "Click2Clone" is also visible, showing options like "Assign", "Get Records", "Share", "Email a Link", "Flow", "Word Templates", and "Run Report". The form displays the order ID "ORD-01002-R9K0M8" and the currency "US Dollar". The "PRODUCTS" section shows a table with columns for Product, Price, Quantity, and Discount.

Product	Price	Quantity	Discount
Concret...	Not C...	\$10.00	1.00000
iPhone 6S	Not C...	\$250.00	1.00000

This screenshot shows the Dynamics 365 Sales Hub interface for the "My Orders" entity home page. The ribbon menu is open, displaying various actions such as "Show Chart", "Edit", "Create Project Invoices", "Delete", "Promote", "Click2Clone", "Assign", "Get Records", "Share", "Email a Link", and "Search for records". A sub-menu for "Click2Clone" is also visible, showing options like "Assign", "Get Records", "Share", "Email a Link", "Flow", "Word Templates", and "Run Report". The page displays a table of orders with columns for Name, Customer, Status Reason, and Total Amount.

Name	Customer	Status Reason	Total Amount
Interested in iPhone	Inogic India Pvt Ltd	New	\$260.00
Order for AtomLife Solutions Pvt. Ltd.	AtomLife Solutions Pvt Ltd.	New	\$1,940.00

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. Congratulations!

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 background shows an "Opportunity: Opportunity" record for "Home Electronics" with an estimated close date of 2017-05-18 and a sales process of "Propose" leading to "Close (16 D)".

The "Get Record(s)" dialog box contains the following fields:

- Select Template:** A dropdown menu with "opportunity" selected.
- Select Relationship(s):** A text input field containing "× product_opportunities".
- Select Source Record:** A text input field containing "Home Electronic System..." with a search icon.

At the bottom of the dialog are "OK" and "Cancel" buttons.

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 fields for Process Name (*), Activate As, Entity, Category, and Scope. It also includes checkboxes for "Available to Run" (Run in background, As an on-demand process, As a child process) and "Workflow Job Retention" (Automatically delete completed workflow jobs).
- Options for Automatic Processes:** Includes checkboxes for "Start when:" (Record is created, Record status changes, Record is assigned, Record fields change, Record is deleted) and a "Select" button.
- Select Fields:** A dialog box showing a list of fields to monitor for changes, including Actual Revenue (Base), Budget, Budget Amount, Budget Amount (Base), Complete Internal Review, Confirm Interest, Contact, Contracting Unit, Created By, Created By (Delegate), and Created On.
- Process: Click2Clone Opportunity to Project Update Project:** A summary view showing project details (Project Template, Name, Description, Customer, Calendar template, Currency, Source Opportunity, Contracting Unit, Project Manager, Overall Project Status) and financial data (Estimates: Estimated Start Date, Estimated Finish Date, Estimated Hours, Estimated Labor Cost, Estimated Expense Cost, Estimated Total Cost; Actuals: Actual Start, Actual End, Actual Hours, Actual Labor Cost, Actual Expense Cost, Actual Total Cost).

The "Update Project" section is highlighted, showing the "Actual Start" field with a value of "[Actual Close Date|Opportunity]".

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

Page 1 of 4

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

Page 1 of 3

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

Learn more about [Click2Clone](#) today.

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