

Record Cloner for Microsoft Dynamics CRM

Release Notes



Release Date: December 2016

Record Cloner

Version 1

Revision History

Date	Description of Change	Author Information
December 2016	Initial Release	Debajit Dutta

XrmForYou

Overview

Microsoft Dynamics CRM provides an integrated, data driven solutions that vastly improve how you interact and do business with your customers. CRM solutions streamline processes and increase profitability in your sales, marketing, and service divisions. A strong CRM solution is a multifaceted platform where everything crucial to developing, improving, and retaining your customer relationships is stored. Microsoft never ceased to mesmerize us by evolving features of Dynamics CRM platform. Despite these evolutionary features still there are lot of functionalities which CRM users want in their day to day life which cannot be achieved by out of box features. One such feature which will be very useful for users is the "**Record Clone**" or "**Record Copy**".

Many times users needs to create multiple records for same entities with same values as of existing record for most of the fields except some key fields. In this kind of scenarios if there is a feature to copy the existing record and modify the key fields to get the new record then it would be great. Record Cloner is designed to achieve the same. For example : Consider you have an opportunity which has completed its life time and if the user wants create a new opportunity with sane details with different future milestone date then the user can clone or copy the existing opportunity using our cloner and update the milestone date accordingly.

Installation Requirements

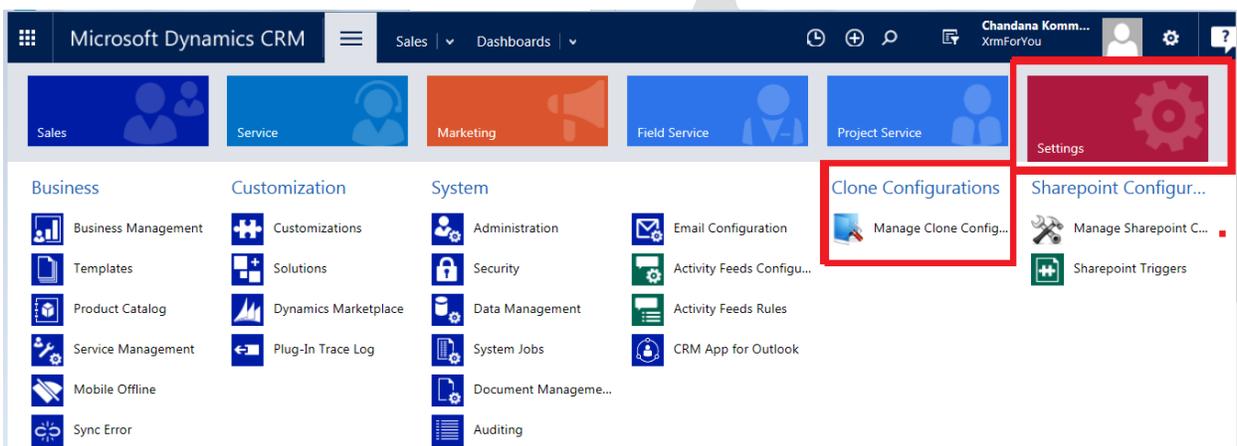
Components	Supported Version
Microsoft Dynamics CRM	Microsoft Dynamics 365
	Microsoft Dynamics CRM 2016
	Microsoft Dynamics CRM 2015
Browsers	Internet Explorer 10 and above
	Google Chrome
	Firefox

Deployment Steps

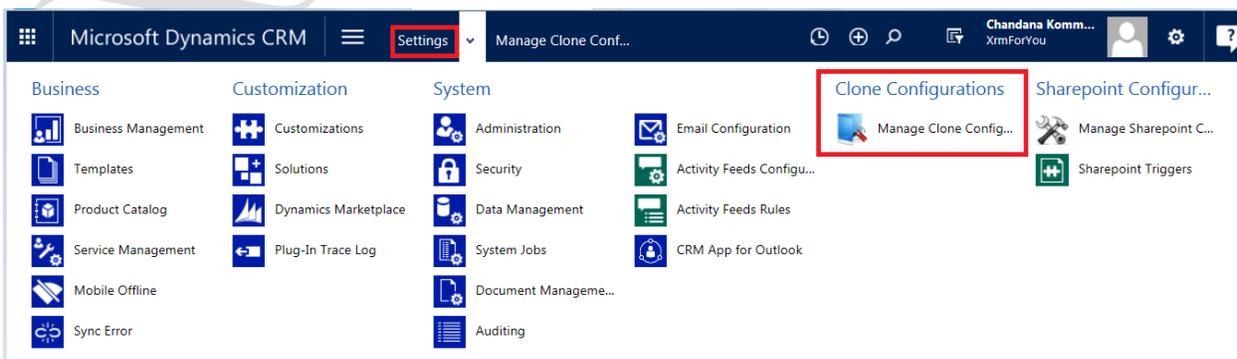
- ❖ Login into your Microsoft Dynamics CRM application with a user having System Administrator role (also Deployment Administrators for On Premise).
- ❖ Import the **"XrmForYou.RecordCloner"** solution into your CRM application and publish it.
- ❖ Assign **"XrmForYou-Cloner"** security role to all the users who want to use the **"Clone"** functionality.

Navigation

Once Record Cloner is deployed to CRM, Please navigate to **"Settings"** area and you can find all the menus related to Cloner under the **"Clone Configurations"** subarea.



Please click on **"Manage Clone Configurations"** to access Clone Configuration page.



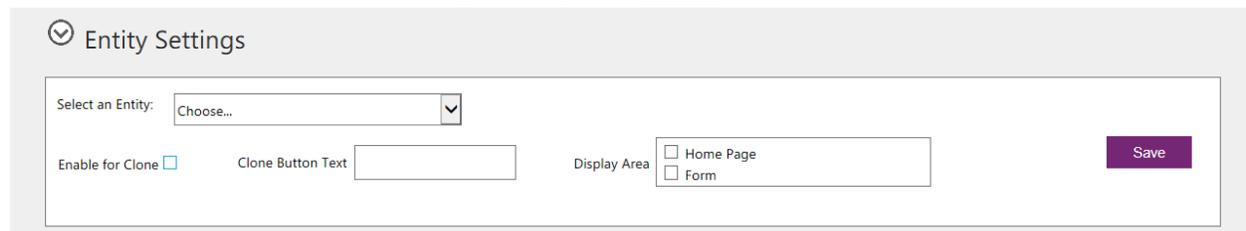


Key Points on Security

- ❖ The Record Cloner tool works in consonance with Microsoft Dynamics CRM security.
- ❖ If a user doesn't have "Create" access on an entity then they will not be able to clone the records of the entity.
- ❖ If a user doesn't have access on particular fields on an entity record then the values for the particular fields will not be copied to the cloned record. This is inline as expected as per the field level security in CRM.

Clone Configuration Page

Entity Settings



Entity Settings

Select an Entity:

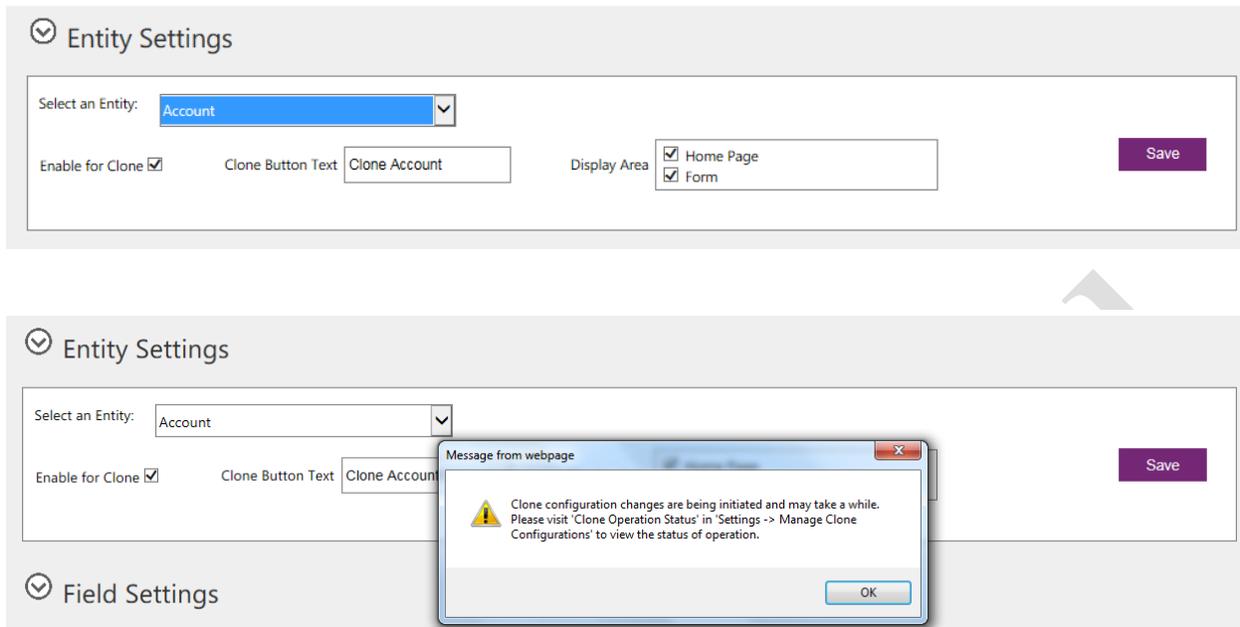
Enable for Clone Clone Button Text

Display Area Home Page Form

Save

Entity settings is the section of the tool where you will have the options to enable an entity for Cloning.

This section also contains options to configure the "Button Label" for the clone button and also we can configure where we want to display the clone button (Entity form or Home page grid).

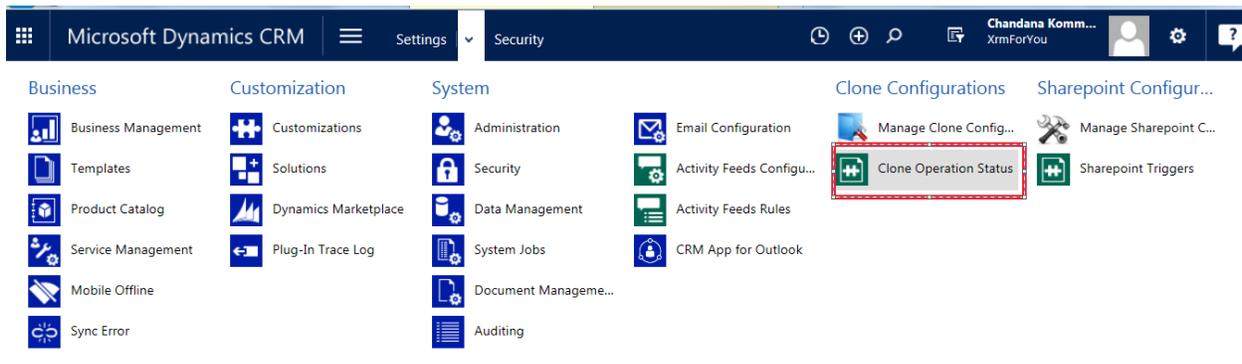


Enable for Clone : This is the setting to enable the selected entity for cloning.

Clone Button Text : This is the Button label which will be used to show for Clone button.

Display Area : This is the setting to configure where we want to display the clone button (**Entity form** or **Home page grid**).

Saving the **“Entity Settings”** configuration is an **asynchronous** operation and the status can be checked in the **Clone Operation Status”** entity. If the **save configuration** operation fails then the exception or error message will be logged in the **“Error Message”** field of the **“Clone Operation Status”** entity.



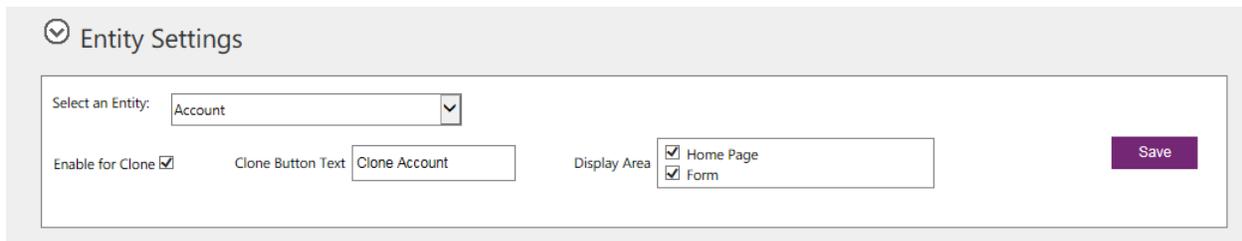
Active Clone Operation Status

Operation Name	Operation S...	Error Message	Created On
Cloning Configurations are initiated for entity: account	In Progress		11/30/2016 6:35 PM
Cloning Configurations are initiated for entity: account	Success		11/27/2016 1:28 PM
Cloning Configurations are initiated for entity: account	Success		11/27/2016 2:29 PM
Cloning Configurations are initiated for entity: account	Success		11/27/2016 2:34 PM

Example :

Configuration

In the below example screenshot "**Account**" entity is configured for cloning.

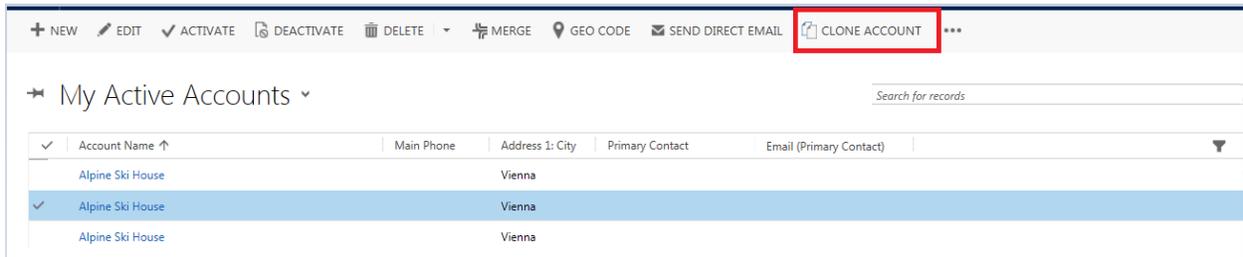


The screenshot shows the 'Entity Settings' form for the 'Account' entity. The 'Enable for Clone' checkbox is checked. The 'Clone Button Text' is set to 'Clone Account'. The 'Display Area' section has checkboxes for 'Home Page' and 'Form', both of which are checked. A 'Save' button is visible on the right.

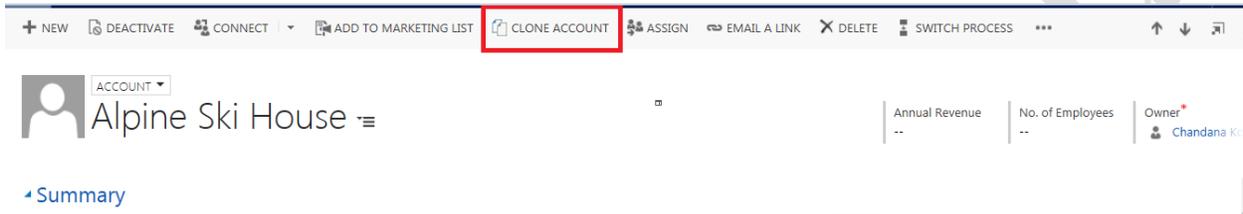
Clone Button on Entity Home Page and Entity Record Form

Then you can see the "**Clone Account**" button on the Account record form and Account Home page as shown in below screenshots.

Select an "Account" record then you will see the "**Clone Account**" button



Clone Button on the Account Form

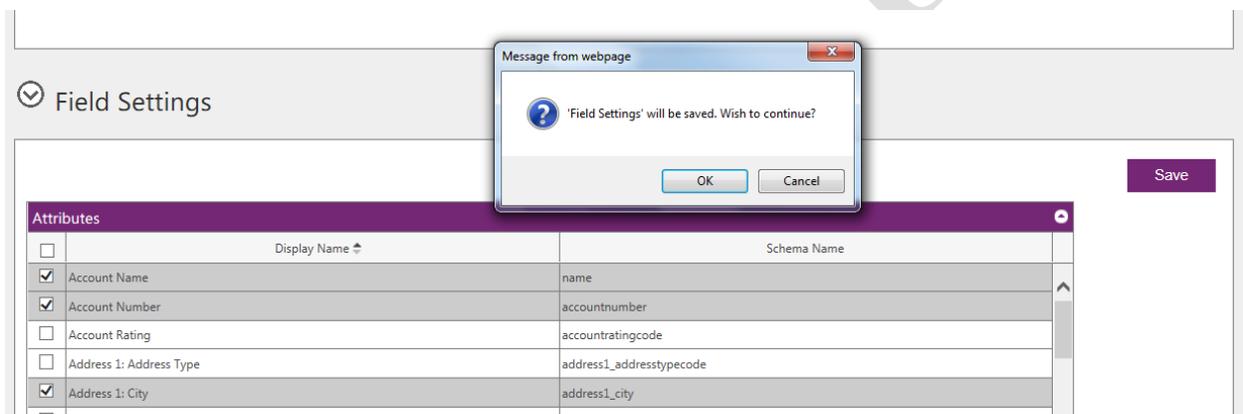
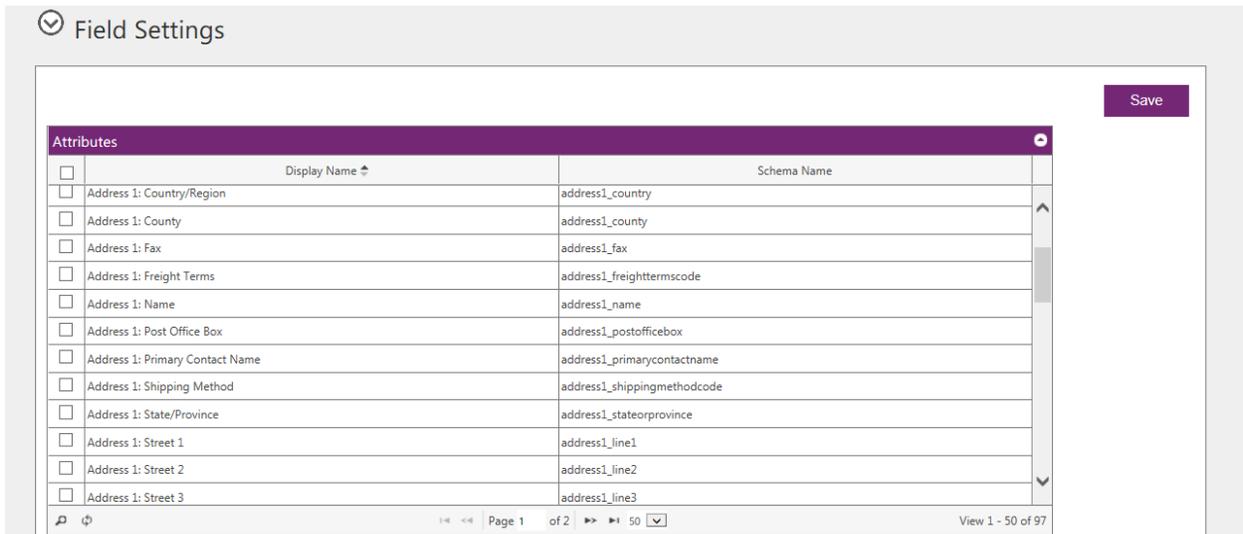


Field Settings

This is the section where you can configure which attributes of the entity record should be configured for cloning.

Once an "entity" is selected in the above "Entity Settings" section then all the Customizable attributes of the will be loaded.

You can select the attributes that should be copied to the cloned record from the parent record when you are cloning the entity record.



Example :

In the below example screenshot, the attributes "Account Name", "Account Number" and "Address 1: City" of the account entity is configured for cloning.

That means when you clone an account record only the Account Name", "Account Number" and "Address 1 : City" of the account record will be copied to newly cloned (created) records by cloning.

Field Settings

Entity Settings

Select an Entity:

Enable for Clone Clone Button Text Display Area Home Page Form

Field Settings

Message from webpage

? 'Field Settings' will be saved. Wish to continue?

Attributes		
<input type="checkbox"/>	Display Name ↕	Schema Name
<input checked="" type="checkbox"/>	Account Name	name
<input checked="" type="checkbox"/>	Account Number	accountnumber
<input type="checkbox"/>	Account Rating	accountratingcode
<input type="checkbox"/>	Address 1: Address Type	address1_addresstypecode
<input checked="" type="checkbox"/>	Address 1: City	address1_city
<input type="checkbox"/>	Address 1: Country/Region	address1_country

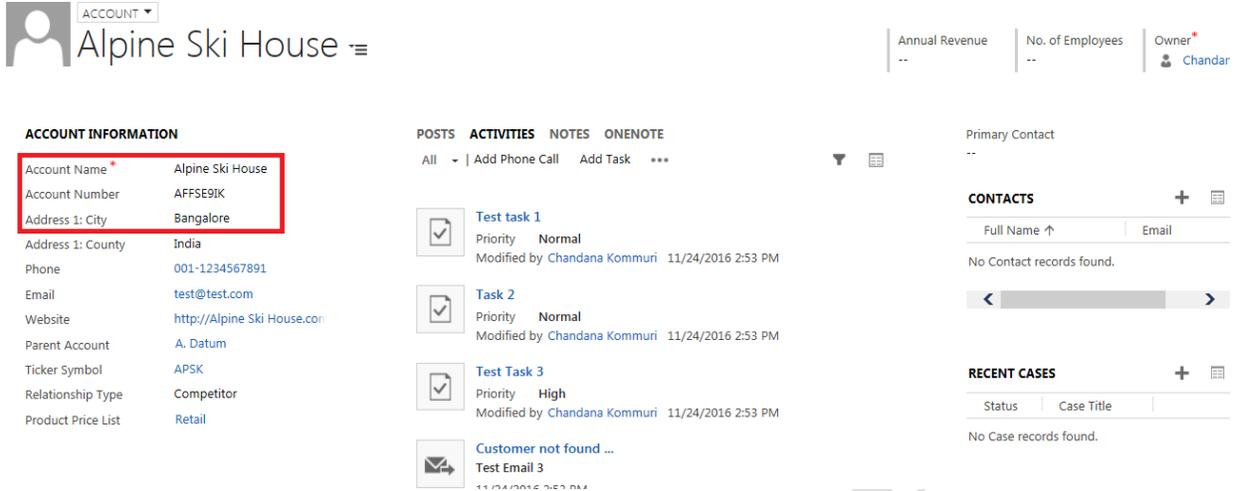
Select an Entity:

Enable for Clone Clone Button Text Display Area Home Page Form

Field Settings

Attributes		
<input type="checkbox"/>	Display Name ↕	Schema Name
<input checked="" type="checkbox"/>	Account Name	name
<input checked="" type="checkbox"/>	Account Number	accountnumber
<input type="checkbox"/>	Account Rating	accountratingcode
<input type="checkbox"/>	Address 1: Address Type	address1_addresstypecode
<input checked="" type="checkbox"/>	Address 1: City	address1_city
<input type="checkbox"/>	Address 1: Country/Region	address1_country

Parent record



ACCOUNT INFORMATION

Account Name *	Alpine Ski House
Account Number	AFFSE9IK
Address 1: City	Bangalore
Address 1: County	India
Phone	001-1234567891
Email	test@test.com
Website	http://Alpine Ski House.com
Parent Account	A. Datum
Ticker Symbol	APSK
Relationship Type	Competitor
Product Price List	Retail

POSTS ACTIVITIES NOTES ONENOTE

All - | Add Phone Call Add Task ***

- Test task 1**
Priority Normal
Modified by Chandana Kommuri 11/24/2016 2:53 PM
- Task 2**
Priority Normal
Modified by Chandana Kommuri 11/24/2016 2:53 PM
- Test Task 3**
Priority High
Modified by Chandana Kommuri 11/24/2016 2:53 PM
- Customer not found ...**
Test Email 3
11/24/2016 2:53 PM

CONTACTS

Full Name ↑ | Email

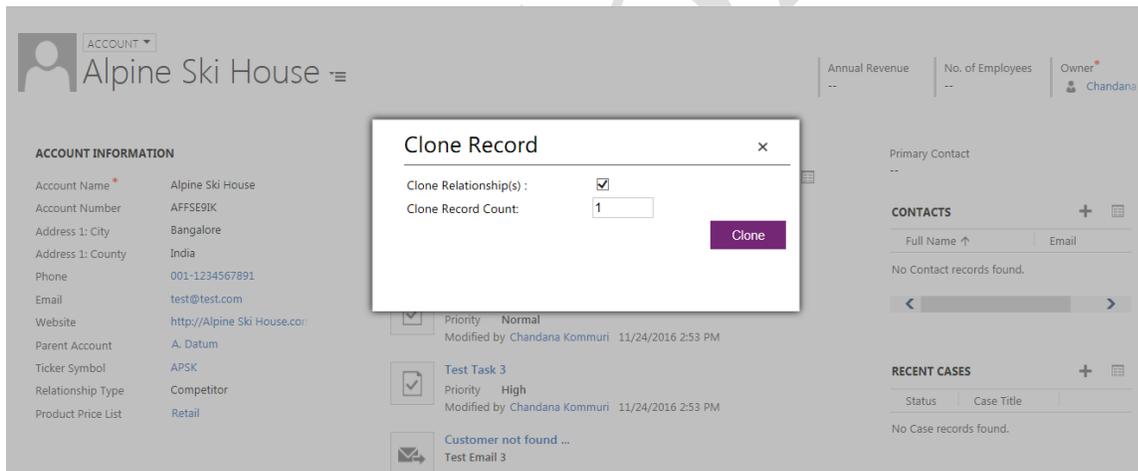
No Contact records found.

RECENT CASES

Status | Case Title

No Case records found.

Cloning

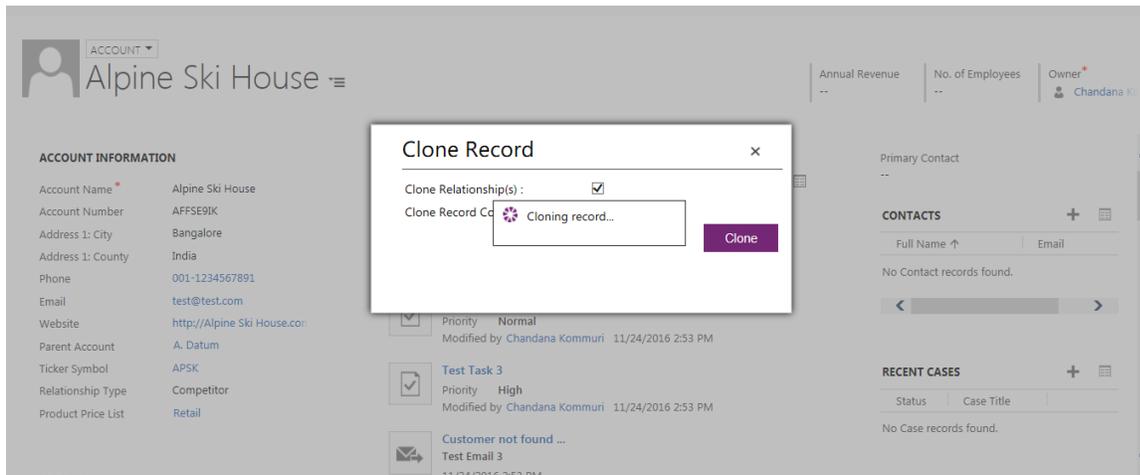


Clone Record

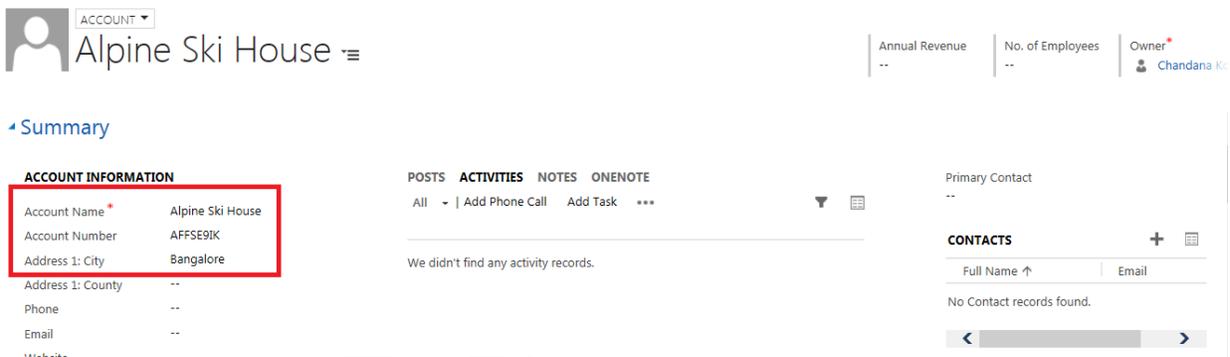
Clone Relationship(s):

Clone Record Count:

Clone



Cloned Record (Child Record)



Relationship Settings

Now let's go back to the **"Relationship Settings"** section on the "Clone Configurations" page.

Once an entity is selected on the "Entity Settings" section then the relationships for that selected entity will be loaded in the "Relationship Settings".

You can select and configure the relationships (related records) that should be considered for cloning when you are cloning the entity record.



Note

- ❖ In the Relationship Section, all the **1: N** and **N: N** Relationships are loaded.
- ❖ The **N: 1** relationships will be a Lookup field on the entity so they will appear in the field settings and not in the Relationship Settings.

Relationship Settings

Save

1:N Relationships			
<input type="checkbox"/>	Relationship Name	Related Entity	Lookup Field
<input type="checkbox"/>	account_entitlement_Account	entitlement	accountid
<input type="checkbox"/>	account_bookableresource_AccountId	bookableresource	accountid
<input type="checkbox"/>	contract_billingcustomer_accounts	contract	billingcustomerid
<input type="checkbox"/>	account_entitlement_Customer	entitlement	customerid
<input type="checkbox"/>	order_customer_accounts	salesorder	customerid
<input type="checkbox"/>	Socialprofile_customer_accounts	socialprofile	customerid
<input type="checkbox"/>	incident_customer_accounts	incident	customerid
<input type="checkbox"/>	opportunity_customer_accounts	opportunity	customerid
<input type="checkbox"/>	contractlineitem_customer_accounts	contractdetail	customerid
<input type="checkbox"/>	invoice_customer_accounts	invoice	customerid

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N:N Relationships			
<input type="checkbox"/>	Relationship Name	Associated Entity	Associated Entity Attribute

<input type="checkbox"/>	Relationship Name	Associated Entity	Current Entity Attribute	Associated Entity Attribute
<input type="checkbox"/>	incident_customer_accounts	incident	customerid	
<input type="checkbox"/>	opportunity_customer_accounts	opportunity	customerid	
<input type="checkbox"/>	contractlineitem_customer_accounts	contractdetail	customerid	
<input type="checkbox"/>	invoice_customer_accounts	invoice	customerid	

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<input type="checkbox"/>	Relationship Name	Associated Entity	Current Entity Attribute	Associated Entity Attribute
<input type="checkbox"/>	xrm4you_account_opportunity	opportunity	accountid	opportunityid

Page 1 of 1 | View 1 - 1 of 1

Relationship Settings

Message from webpage

Relationship settings will be saved. Wish to continue?

OK Cancel

<input type="checkbox"/>	Relationship Name	Associated Entity	Current Entity Attribute	Associated Entity Attribute
<input type="checkbox"/>	contact_customer_accounts		customerid	
<input type="checkbox"/>	Account_CustomerAddress			
<input type="checkbox"/>	SocialActivity_PostAuthor_accounts	socialactivity	postauthor	
<input type="checkbox"/>	SocialActivity_PostAuthorAccount_accounts	socialactivity	postauthoraccount	
<input type="checkbox"/>	Account_Faxes	fax	regardingobjectid	
<input checked="" type="checkbox"/>	Account_Tasks	task	regardingobjectid	
<input type="checkbox"/>	Account_SyncErrors	syncerror	regardingobjectid	

Save

Example :

1:N Relationships

In the below example screenshot, the 1: N relationship "Account_Tasks" (Relationship between Account entity and Task entity) is configured to consider while cloning the "Account" record.

That means when you clone an account record then all the related tasks associated with the account record will be cloned.

Parent Account record with related Task

The screenshot shows the account details for 'Alpine Ski House'. The account information includes: Account Name: Alpine Ski House, Account Number: AFFSE91K, Address 1: City: Bangalore, Address 1: County: --, Phone: --, Email: --, Website: --. A task record is highlighted with a red box: 'Test Cloning the related Task', Priority: Normal, Modified by: Chandana Kommuri, Today. The task is associated with the account. The interface also shows a 'CONTACTS' section with no records found.

Cloning the Account record

The screenshot shows the 'Clone Record' dialog box. The dialog has a 'Clone Relationship(s)' field with a checked checkbox and a 'Clone Record Count' field with the value '1'. A 'Clone' button is visible. The background shows the account details for 'Alpine Ski House'.

Clone Account record with the cloned related Task record

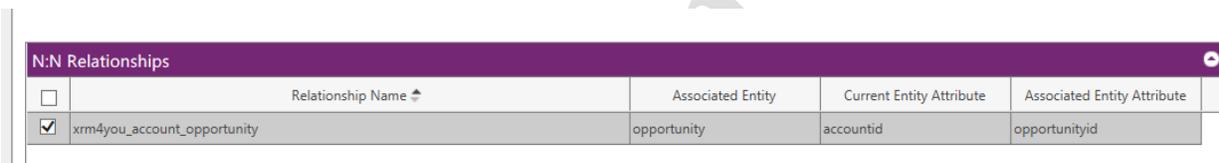
The screenshot shows the account details for 'Alpine Ski House' with a task record. The account information includes: Account Name: Alpine Ski House, Account Number: AFFSE91K, Address 1: City: Bangalore, Address 1: County: --, Phone: --, Email: --, Website: --. A task record is highlighted with a red box: 'Test Cloning the related Task', Priority: Normal, Modified by: Chandana Kommuri, Today. The task is associated with the account. The interface also shows a 'CONTACTS' section with no records found.

1:N Relationships

In the same way as explained the users can configure which all N: N relationships of the entity should be consider while cloning the record of the entity.

In the below example screenshot, the N: N relationship of Account entity with Opportunity entity (**Relationship Name: xrm4you_account_opportunity**) is configured for cloning while cloning the account record.

That means if an account record is cloned, then if the account is having any related opportunity associated with the account record through **xrm4you_account_opportunity relationship** then the respective opportunities will also be cloned.

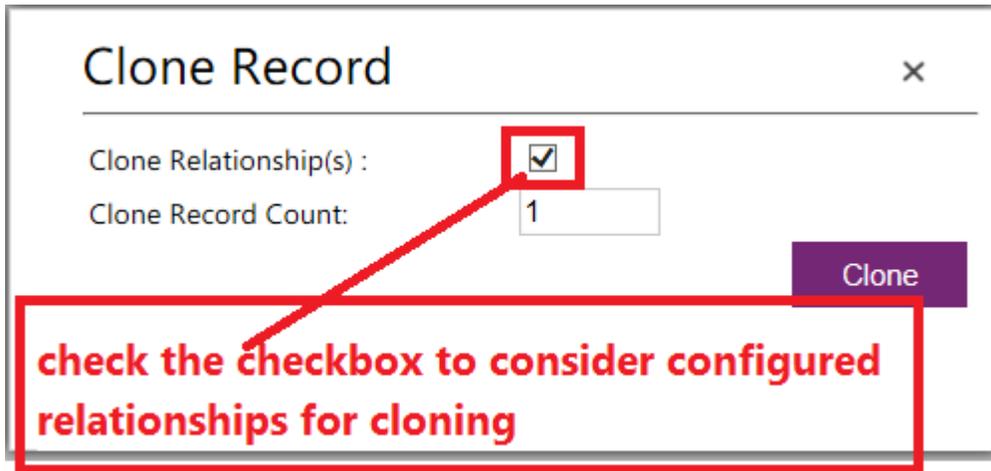


N:N Relationships				
<input type="checkbox"/>	Relationship Name ↕	Associated Entity	Current Entity Attribute	Associated Entity Attribute
<input checked="" type="checkbox"/>	xrm4you_account_opportunity	opportunity	accountid	opportunityid

Including / Excluding Relationships on Cloning

You have option to include or exclude the relationships of an entity (means related records) from cloning while cloning an entity record.

Once the checkbox in the below shown popup is checked then all the relationships which are configured for cloning for this entity will be considered while cloning the entity record.



Clone Record

Clone Relationship(s) :

Clone Record Count: 1

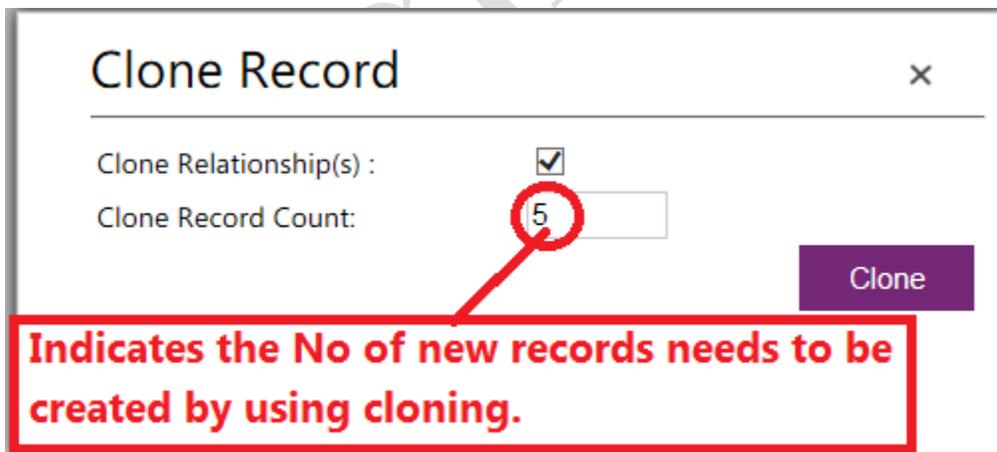
Clone

check the checkbox to consider configured relationships for cloning

Creating more than one records using Cloner

The users have option to create multiple records by cloning a single record using our cloner record.

The number in the “**Clone Record Count**” field on the Clone Record popup indicates the number of the records the users want to create by cloning.



Clone Record

Clone Relationship(s) :

Clone Record Count: 5

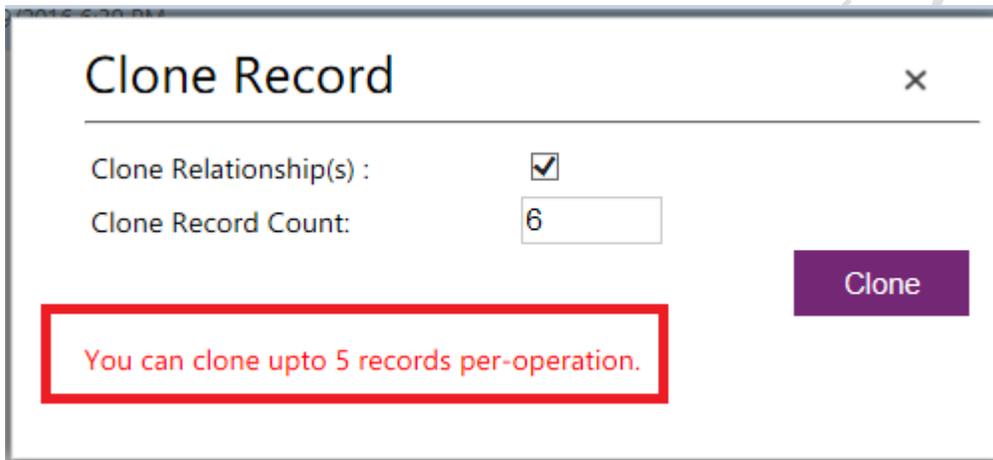
Clone

Indicates the No of new records needs to be created by using cloning.



Note

- ❖ Maximum of **5** records can be created at one time. (i.e.) maximum value allowed in the “**Clone Record Count**” field is “**5**”.
- ❖ When more than one record is to be created then the cloning operation will happen **asynchronously**.



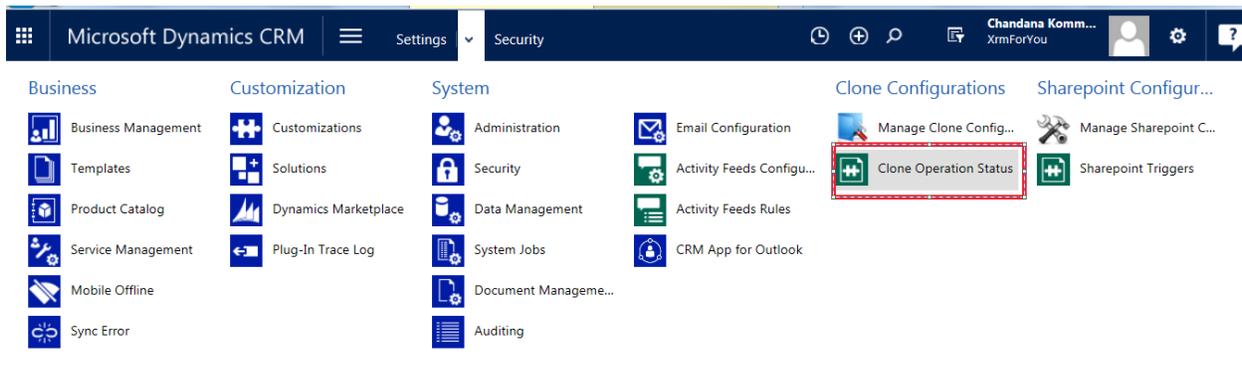
Checking the status of the Cloning Operation (Only on creation of multiple records)

Clone Operation Status

When more than one record is to be created, then the cloning operation will happen **asynchronously**.

Users can check the status of the scheduled **asynchronous** operation from the “**Clone Operation Status**” entity.

If the **asynchronous** operation fails then the exception or error message will be logged in the “**Error Message**” field of the “**Clone Operation Status**” entity.



Active Clone Operation Status

Operation Name	Operation Status	Error Message	Created On
Cloning Configurations are initiated for entity: email	Success		11/28/2016 3:42 PM
Cloning Configurations are initiated for entity: new_one	In Progress		11/29/2016 5:10 PM
Cloning Configurations are initiated for entity: new_one	Success		11/28/2016 11:18 PM
Cloning Configurations are initiated for entity: new_one	Success		11/29/2016 4:05 PM
Cloning Configurations are initiated for entity: new_one	In Progress		11/29/2016 5:15 PM
Cloning Configurations are initiated for entity: new_one	In Progress		11/29/2016 8:19 PM

Active Clone Operation Status

Operation Name	Operation Status	Error Message	Created On
Cloning Configurations are initiated for entity: account	Failed	Object reference not set to an instance of an object.	11/27/2016 3:54 PM
Cloning for entity: new_one	Failed	Index was out of range. Must be non-negative and less th...	11/28/2016 11:50 PM
Cloning for entity: new_one	Failed	Index was out of range. Must be non-negative and less th...	11/28/2016 11:52 PM

Contact us

For free trial and further info on Record Cloner Please feel free to write to us @ info@xrmforyou.com
