

# **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	



# **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 365
Microsoft Dynamics CRM	Microsoft Dynamics CRM 2016
	Microsoft Dynamics CRM 2015
	Internet Explorer 10 and above
Browsers	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 tools 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**

$\odot$ Entity Settings				
Select an Entity: Choose	~			
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).



⊖ Entity Settings		
Select an Entity: Account Enable for Clone I Clone Button Text Clone Account	t Display Area dr Form	Save
L		
Select an Entity:		
Enable for Clone I Clone Button Text Clone Account	Message from webpage	Save
➢ Field Settings	ОК	

**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.



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Business	Customization	System	Clone Configurations Sharepoin	t Configur
Business Management	Customizations	Administration	🔀 Email Configuration 🛛 🔜 Manage Clone Config 🧏 Manag	e Sharepoint C
Templates	Solutions	Security	Activity Feeds Configu Clone Operation Status	oint Triggers
Product Catalog	Dynamics Marketplace	Data Management	Activity Feeds Rules	
Yanagement Service Management	Plug-In Trace Log	System Jobs	CRM App for Outlook	
Mobile Offline		Document Manageme		
Sync Error		Auditing		
➡ Active Clone C	Operation Status 🕤		Search for records	Q
✓ Operation Name ↑	✓ Operation	S 🔻 Error Message	✓ Created On ▼	<b>T</b> 0
Cloning Configurations are initia	ted for entity: account In Progress		11/30/2016 6:35 PM	~
Cloning Configurations are initia	ted for entity: account Success		11/27/2016 1:28 PM	
Cloning Configurations are initia	ted for entity: account Success		11/27/2016 2:29 PM	6
Cloning Configurations are initia	ted for entity: account Success		11/27/2016 2:34 PM	
	an an an an an			

## Example :

#### **Configuration**

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

C Entity Settings	
Select an Entity:	
Account	
V Home Page	Save
Enable for Clone 🗹 Clone Button Text Clone Account Display Area	

#### **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



	NEW	🖋 EDIT	✓ ACTIVATE	or deactivate	<u> </u> Delete 🗸	<b>뉴</b> MERGE	GEO CODE	SEND DIRECT EM	IAIL 🙆 CL	ONE ACCOUNT		
-	- M	y Activ	ve Acco	unts ~						Search for r	records	
	✓ A	, account Name	• <b>↑</b>		Main Phone	Address	: 1: City Prima	ry Contact	Email (Primary	y Contact)		Ŧ
	✓ A	, .ccount Name .lpine Ski Hou	: ↑ ise		Main Phone	Address Vienna	; 1: City Prima	ry Contact	Email (Primary	y Contact)		Ŧ
	A \	, ccount Name Ipine Ski Hou Ipine Ski Hou	e ↑ se se		Main Phone	Address Vienna Vienna	: 1: City Prima	ry Contact	Email (Primary	y Contact)		Ŧ

**Clone Button on the Account Form** 

🕂 NEW 🗋 DEACTIVATE 📲 CONNECT 👻 📑 ADD TO MARKETING LIST	🖆 CLONE ACCOUNT	6N 🖚 EMAIL A LINK	X DELETE	SWITCH PROCES	S ***	↑ ↓	я <u>з</u>
Alpine Ski House -=				Annual Revenue	No. of Employees	Owner*	ana Ko
* Summary							

## **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.



#### <sup>☉</sup> Field Settings

Attr	butes		0
	Display Name ≑	Schema Name	
	Address 1: Country/Region	address1_country	
	Address 1: County	address1_county	$\cap$
	Address 1: Fax	address1_fax	
	Address 1: Freight Terms	address1_freighttermscode	
	Address 1: Name	address1_name	
	Address 1: Post Office Box	address1_postofficebox	
]	Address 1: Primary Contact Name	address1_primarycontactname	
]	Address 1: Shipping Method	address1_shippingmethodcode	
	Address 1: State/Province	address1_stateorprovince	
	Address 1: Street 1	address1_line1	
	Address 1: Street 2	address1_line2	
	Address 1: Street 3	address1_line3	
p	¢ i≪ Page 1 o	f 2 🍽 🖬 50 🔽 View 1 - 50 of	197

⊗ F	Field Settings	Message f	rom webpage	Sa
Attri	butes			0
	Display Name ≑		Schema Name	
	Account Name		name	~
<ul><li>✓</li></ul>	Account Number		accountnumber	
	Account Rating		accountratingcode	1
	Address 1: Address Type		address1_addresstypecode	1
<ul><li>✓</li></ul>	Address 1: City		address1_city	
_				

#### 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.



#### <u>Field Settings</u>

Account		
able for Clone 🗹 Clone Button Text Clone Account	Display Area 🗹 Home Page	Save
	Message from webpage	
Field Settings	Field Settings' will be saved. Wish to continue?	
	OK Cancel	Save
ttributes	•	
Display Name ≑	Schema Name	
Account Name	name	
Account Number	accountnumber	
Account Rating	accountratingcode	
Address 1: Address Type	address1_addresstypecode	
Address 1: City	address1_city	
Address 1: Country/Region	address1_country	
Enable for Clone I Clone Button Text Clone Account	Display Area 🗹 Home Page	Save
${\mathfrak S}$ Field Settings		
		Save
Attributes	٥	
Attributes	Schema Name	
Attributes Display Name  Account Name	Schema Name	
Attributes       Display Name \$       Account Name       Account Number	Schema Name accountnumber	
Attributes       Display Name \$       Account Name       Account Number       Account Rating	Schema Name  name accountnumber accountratingcode	
Attributes       Display Name \$       Account Name       Account Number       Account Rating       Address 1: Address Type	Schema Name  Schema Name  accountnumber  accountratingcode address1_addresstypecode	
Attributes       □     Display Name \$       ✓     Account Name       ✓     Account Number       □     Account Rating       □     Address 1: Address Type       ✓     Address 1: City	Schema Name     Schema Name     accountnumber     accountratingcode     address1_addresstypecode     address1_city	
Attributes       □     Display Name \$       ✓     Account Name       ✓     Account Number       □     Account Rating       □     Address 1: Address Type       ✓     Address 1: City       □     Address 1: City	Schema Name     Schema Name     accountnumber     accountratingcode     address1_addresstypecode     address1_city     address1_country	



#### Parent record





		Clone Record			
CCOUNT INFORMATION			Primary Co	intact	
count Name Alpine Ski I	House	Clone Relationship(s) :			_
dress 1: City Bangalore		Clone Record Cd 🞲 Cloning record	CONTACT	5 +	
dress 1: County India			Full Nan	me ↑ Email	
one 001-12345	67891		No Contac	t records found.	
ail test@test.c	com	Priority Normal	<		>
ent Account A. Datum	ne ski House.com	Modified by Chandana Kommuri 11/24/2016 2:53 PM			
ker Symbol APSK		Test Task 3	RECENT C	ASES +	
lationship Type Competito	r	Priority High	Status	Case Title	
duct Price List Retail		Modified by Chandana Kommuri 11/24/2016 2:53 PM	No Case re	ecords found.	
		Customer not found			
<u>1ed Record ( C</u>	hild Record	Test Email 3 11/24/2016 2:53 DM	Ţ		¥
Account • Alpine Sk	r <u>hild Record</u> <i -<="" house="" th=""><th>Test Email 3 11/2A/2016 2:53 DM</th><th>Annual </th><th>I Revenue No. of Emp </th><th>loyees Owner*</th></i>	Test Email 3 11/2A/2016 2:53 DM	Annual 	I Revenue No. of Emp 	loyees Owner*
ned Record ( C Account • Alpine Sk	i <mark>hild Record</mark> ki House -		Annual 	Revenue No. of Emp 	loyees Owner*
Alpine Skummary	i <mark>hild Record</mark> ki House -	POSTS ACTIVITIES NOTES ONENOTE	Annual 	I Revenue No. of Emp  Primary Contact	loyees Owner*
Account • Alpine Sk ummary	' <u>hild Record</u> <i -<="" house="" td=""><td>POSTS ACTIVITIES NOTES ONENOTE All -   Add Phone Call Add Task ***</td><td>Annual </td><td>Revenue No. of Emp  Primary Contact </td><td>loyees Owner*</td></i>	POSTS ACTIVITIES NOTES ONENOTE All -   Add Phone Call Add Task ***	Annual 	Revenue No. of Emp  Primary Contact 	loyees Owner*
Account • Alpine Sk ummary count INFORMATION	ski House	POSTS ACTIVITIES NOTES ONENOTE All -   Add Phone Call Add Task ***	Annual 	Revenue No. of Emp  Primary Contact  <b>CONTACTS</b>	loyees Owner* Char
Account Alpine Sk Alpine Sk ummary count INFORMATION count Name* Alpine count Number AFFE9 Idress 1: City Bangal	Ski House	POSTS ACTIVITIES NOTES ONENOTE All -   Add Phone Call Add Task *** We didn't find any activity records.	Annual 	Revenue No. of Emp  Primary Contact  CONTACTS Full Name ↑	loyees Owner* Char Email
ACCOUNT ACCOUNT Alpine Sk Alpine Sk Al	Ski House	POSTS ACTIVITIES NOTES ONENOTE All -   Add Phone Call Add Task ***	Annual 	Revenue No. of Emp  Primary Contact  CONTACTS Full Name ↑ No Contact records for	loyees Owner* Char Email
Account C Alpine Sk ummary count INFORMATION count Number AFFE9 ddress 1: City Bangal ddress 1: City Bangal ddress 1: County none	Ski House	POSTS ACTIVITIES NOTES ONENOTE All -   Add Phone Call Add Task ***	Annual 	I Revenue No. of Emp  Primary Contact  CONTACTS Full Name ↑ No Contact records for	loyees Owner* Char Email und.

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.

R∉	alationships			0
	Relationship Name	Related Entity	Lookup Field 🗢	
1	account_entitlement_Account	entitlement	accountid	
] ;	account_bookableresource_AccountId	bookableresource	accountid	
] (	contract_billingcustomer_accounts	contract	billingcustomerid	
] ;	account_entitlement_Customer	entitlement	customerid	
] (	order_customer_accounts	salesorder	customerid	
] :	Socialprofile_customer_accounts	socialprofile	customerid	
] i	ncident_customer_accounts	incident	customerid	
] (	pportunity_customer_accounts	opportunity	customerid	
] (	contractlineitem_customer_accounts	contractdetail	customerid	
1 li	nvoice customer accounts	invoice	customerid	
¢	Page 1 of 2 🍉	▶I 50 V	View 1 - 50 o	f 67



Incident_customer_accounts		ir	ncident		customerie	d	
opportunity_customer_accounts		0	pportunity		customeric	ł	
contractlineitem_customer_accounts		c	ontractdetail		customerio	d	
invoice customer accounts		ir	nvoice		customeric	d	1
¢	💷 < Page 1	of 2 🏼 🕨 🕨	50 🔽			View 1 - 50 of	f 67
N Relationships							0
Relationship Name 🗢		Asso	ciated Entity	Current Entity A	tribute	Associated Entity Attribute	
xrm4you_account_opportunity		opportunity	/	accountid		opportunityid	

#### $\odot$ Relationship Settings

4.01.0		Message from webpage		x		Save
	Relationship Name	Relationshi	p settings' will be saved. Wish to continue	Lookup Field 🖨		
	contact_customer_accounts		OK Caper	ustomerid	~	
	Account_CustomerAddress					
	SocialActivity_PostAuthor_accounts		socialactivity	postauthor		
	SocialActivity_PostAuthorAccount_accounts		socialactivity	postauthoraccount		
	Account_Faxes		fax	regardingobjectid		
	Account_Tasks		task	regardingobjectid		
	Account_SyncErrors		syncerror	regardingobjectid		

## 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

Account Name *	Alpine Ski House	All 👻   Add Phone Call Add Task 🚥 🕇	$\blacksquare$			
Account Number	AFFSE9IK			CONTACTS		+
Address 1: City	Bangalore	Test Cloning the related Task Test Cloning the related Task		Full Name ↑		Email
Address 1: County		Modified by Chandana Kommuri Today		No Contact reco	ords found.	
Email				/		
Nehsite				<b>`</b>		
	<u>Accont record</u> ne Ski House -	=	Annual Reven	nue No. of Emp	loyees Own	ner*
Account Alpir	<u>Accont record</u> ne Ski House -	≡ Clone Record × Clone Relationship(s):	Annual Rever	nue No. of Emp  Primary Contact	loyees Own	ner Chandana K
Account information	<u>Accont record</u> ne Ski House - non	Elone Record × Clone Relationship(s): Clone Record Count:	Annual Rever  F	No. of Emp  Primary Contact	loyees Owr	ner* Chandana I
Account information Account Information Account Information Account Number	Accont record ne Ski House - ne ski house Alpine Ski House Affsegik	E Clone Record × Clone Relationship(s): Clone Record Count: 1 Clone	Annual Rever	No. of Emp  Primary Contact - CONTACTS	loyees Own	ner* Chandana i
Account Account Account INFORMAT Account INFORMAT Account Number Account Number Address 1: City	Accont record The Ski House Alpine Ski House AFFSE9IK Bangalore	E Clone Record   Clone Relationship(s): Clone Record Count:  Clone Record Count:  Clone	Annual Rever	nue No. of Emp  Primary Contact - CONTACTS Full Name ↑	loyees Owr	ner* Chandana
Account information Account information Account Name Account Number Address 1: City Address 1: County Bhone	Accont record	E Clone Record Clone Relationship(s): Clone Record Count: 1 Clone Clone	Annual Rever	nue No. of Emp  Primary Contact - CONTACTS Full Name ↑ No Contact records fo	loyees Owr	ner* Chandana
Account information Account information Account Name Account Number Address 1: City Address 1: County Phone Email	Accont record	E Clone Record  Clone Record Count:	Annual Rever	nue No. of Emp  Primary Contact - CONTACTS Full Name ↑ No Contact records for	loyees Own	ner* Chandana

#### Clone Account record with the cloned related Task record





## **<u>1:N Relationships</u>**

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				0
	Relationship Name 🜩	Associated Entity	Current Entity Attribute	Associated Entity Attribute	
	xrm4you_account_opportunity	opportunity	accountid	opportunityid	Π
					-

## 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 conf relationships for cloning	igured		

#### 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 allowed in the "Clone Record Count" field is	time. (i.e.) maximum value 5 <b>"5".</b>
When more than one record is to be created happen asynchronously.	then the cloning operation will
Clone Record	×
Clone Relationship(s) : Clone Record Count: 6	
You can clone upto 5 records per-operation.	Clone

# <u>Checking the status of the Cloning Operation (Only on creation of multiple records)</u>

## **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.



III Microsoft Dynamics CRM	Settings	✓ Security	C	) 🕀 🔎 🕞 Cha	ndana Komm ForYou 🌣 📪
Business Customization	n Syst	em		Clone Configurations	Sharepoint Configur
Business Management 🛛 🕂 Customizati	ons 🕹	Administration	Email Configuration	Manage Clone Config	. 💦 Manage Sharepoint C
Templates Templates Solutions	ß	Security	Activity Feeds Configu	Clone Operation Status	Sharepoint Triggers
Product Catalog Dynamics N	larketplace 👸	Data Management	Activity Feeds Rules		
Service Management 🗧 Plug-In Trac	e Log	System Jobs	CRM App for Outlook		
Mobile Offline		Document Manageme			
Sync Error		Auditing			
✤ Active Clone Operation S	tatus 🖌			1	Q
✓ Operation Name ↑	Operation Status	Error Message	Created 0	On	<b>T</b> 2
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	0/2016 5:10 PM	
Cloning Configurations are initiated for entity: new_one	Success		11/28/2	2016 11:18 PM	c
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,	V2016 8:19 PM	
* Active Clone Operation S	tatus ×			Search for records	ا
Active clone operation 5			Surrout		
Operation Name      v     Cloping Configurations are initiated for entity: account	Operation S V	Error Message Object reference not set to an instance	of an object 11/27/	On ▼ /2016 3-54 PM	<b>Y</b> 0
Cloning for entity: new_one	Failed	Index was out of range. Must be non-n	egative and less th 11/28/2	2016 11:50 PM	
Cloning for entity: new_one	Failed	Index was out of range. Must be non-n	egative and less th 11/28/2	2016 11:52 PM	(
For free trial	and fur	<u>Contact</u> ther info on	<u>us</u> Record C	Cloner Plea	se feel
				<u></u>	