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## Key Features

- *Clone parent objects along with any related lists / child objects in just 2 clicks*
- *Total control over which related list and fields to clone*
- *Enhanced grid to configure fields – mark them as required, read only, or even provide a default value*
- *Supports standard and custom objects*
- *Supports record type specific cloning*

## Navigating to iClone app

1. Select "iClone" app from the app menu
2. Click "iClone" tab
3. Click "New" or edit existing configuration.

The screenshot shows the Salesforce user interface. At the top, there is a search bar and navigation tabs for Home, Leads, Accounts, Opportunities, Products, Reports, and iClone. The iClone tab is highlighted with a red box and the number 2. Below the tabs, there is a dropdown menu for the iClone app, with the 'iClone' option highlighted by a red box and the number 1. In the main content area, there is a table with columns for Action, Name, API Name, and Parent Object. The 'New iClone' button is highlighted with a red box and the number 3.

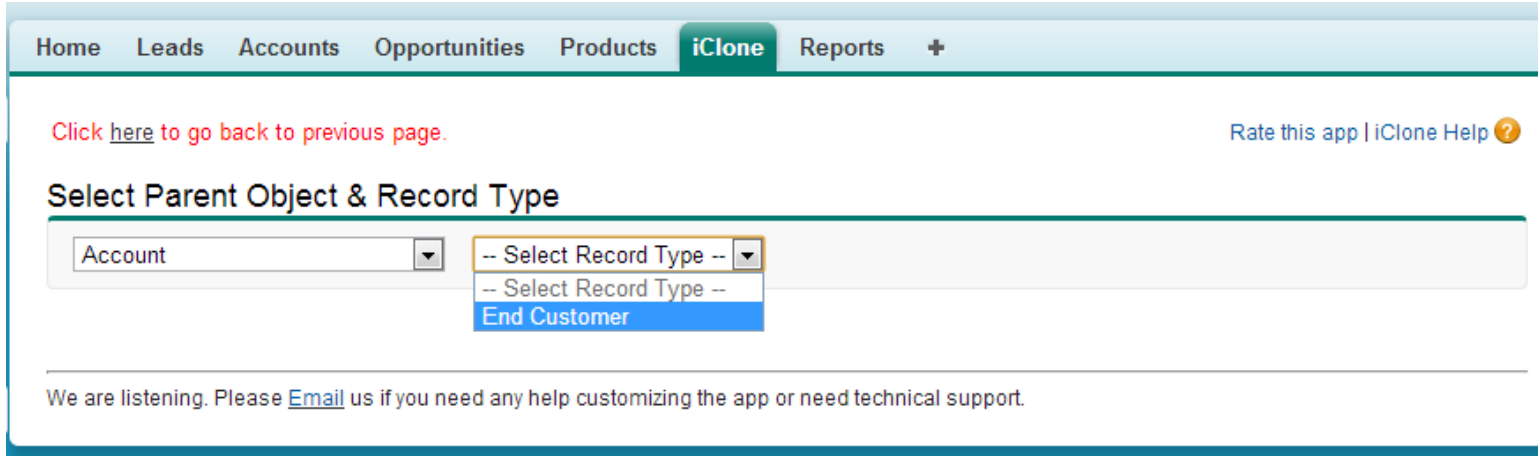
| Action                                     | Name                       | API Name   | Parent Object               |
|--|----------------------------|------------|-----------------------------|
| <a href="#">Edit</a>   <a href="#">Del</a> | <a href="#">Attachment</a> | Attachment | <a href="#">Opportunity</a> |
| <a href="#">Edit</a>   <a href="#">Del</a> | <a href="#">Event</a>      | Event      | <a href="#">Opportunity</a> |
| <a href="#">Edit</a>   <a href="#">Del</a> | <a href="#">Note</a>       | Note       | <a href="#">Lead</a>        |

Note: If you see documentation when you select the app, scroll to bottom-right >> select "go to app" or "do not show this page again"

You can always get to the documentation by clicking "Help for this page" within the app.

## Configuring Parent Object

1. Select the object from the picklist that you want end users to clone. If it has record type, select that. It will automatically take you to VF page to configure fields for the object.



The screenshot shows the iClone application interface. The top navigation bar includes links for Home, Leads, Accounts, Opportunities, Products, iClone (highlighted), and Reports. Below the navigation bar, there is a link to go back to the previous page and a link to rate the app or get help. The main content area is titled 'Select Parent Object & Record Type' and contains two dropdown menus. The first dropdown menu is set to 'Account'. The second dropdown menu is set to '-- Select Record Type --' and is open, showing a list of options including '-- Select Record Type --' and 'End Customer'. At the bottom of the page, there is a footer message: 'We are listening. Please [Email](#) us if you need any help customizing the app or need technical support.'

2. Custom VF page for configuring fields

**Messages**

- Field types supported: String, Picklist, Reference, Boolean, Currency, Number, Percent, Date, Datetime, URL, and Email.
- Unique\*** are system unique fields. User must enter unique value while cloning.  
**Read Only\*** are system read only or restrictive reference fields.  
**Required\*** are system required fields.
- Select **ERASE** to erase existing field value while cloning.
- Select **Use First as Master** to copy first field value across all the records.  
This is only applicable for bulk cloning child records.

Click [here](#) to go back to previous page.

Rate this app | iClone Help

Configure Account fields

Save Quick Save


| <input type="checkbox"/>            | Order | Name                | API Name       | Default Value | Type      | Erase                               | Hide Field               | Use First as Master      | Field Type | Custom?                  |
|-------------------------------------|-------|---------------------|----------------|---------------|-----------|-------------------------------------|--------------------------|--------------------------|------------|--------------------------|
| <input checked="" type="checkbox"/> | 1     | Account Number      | AccountNumber  | 1234          | --None--  | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | STRING     | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | 2     | Account Source      | AccountSource  | Web           | --None--  | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | PICKLIST   | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | 3     | Billing Country     | BillingCountry | ERASE         | Required  | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | STRING     | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | 4     | Account Description | Description    |               | Read Only | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | TEXTAREA   | <input type="checkbox"/> |
| <input type="checkbox"/>            | 5     | Owner ID            | OwnerId        |               | Read Only | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | REFERENCE  | <input type="checkbox"/> |
| <input type="checkbox"/>            | 6     | Annual Revenue      | AnnualRevenue  |               | --None--  | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | CURRENCY   | <input type="checkbox"/> |
| <input type="checkbox"/>            | 7     | Billing City        | BillingCity    |               | --None--  | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | STRING     | <input type="checkbox"/> |


- a. *Select only those fields that need to be updated while cloning. Other field values will be copied as is*
  - b. *Provide default field value*
  - c. *Mark fields as “Read Only” or “Required”*
  - d. *Select “ERASE” to blank existing field value. Erase and Required will ensure new value is always entered when cloning the record*
  - e. *Select “Hide Field” if you want to provide default value, but end users should not see it while cloning*
  - f. *“Use First as Master” comes in handy, if you are cloning in bulk and same field value needs to be copied across all records  
For e.g. cloning account records to having same owner for all*
  - g. *“Field Type” and “Custom” column gives more info about the field*
3. *Click Quick Save to save the changes to database but stay on same page. Click Save to go back to previous page*

## Configuring Child Object (Related List)

1. Scroll down to “iClone Related Lists” section and click “Configure Related Lists”.

[Opportunities](#)
[Products](#)
[iClone](#)
[Reports](#)
[+](#)


**iClone Account**

[Customize Page](#) | [Edit Layout](#) | [Printable View](#) | [Help for this Page](#) 

[← Back to List: Custom Object Definitions](#)

[iClone Fields \[4\]](#) | [iClone Related Lists \[0\]](#) | [Open Activities \[0\]](#) | [Activity History \[0\]](#)

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**iClone Detail** [Edit](#) [Clone](#) [Delete](#)

|               |         |                 |              |
|---------------|---------|-----------------|--------------|
| Name          | Account | Type            | Parent       |
| API Name      | Account | Record Type     | End Customer |
| Parent Object |         | Unique fields # | 0            |

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**System Information** [Edit](#) [Clone](#) [Delete](#)

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**iClone Fields** [Configure Fields](#) [iClone Fields Help](#) 

| Action                                     | Name                           | API Name      | Default Value | Type      | Field Type | Custom?                  | Order |
|--|--------------------------------|---------------|---------------|-----------|------------|--------------------------|-------|
| <a href="#">Edit</a>   <a href="#">Del</a> | <a href="#">Account Number</a> | AccountNumber |               |           | STRING     | <input type="checkbox"/> | 1     |
| <a href="#">Edit</a>   <a href="#">Del</a> | <a href="#">Account Source</a> | AccountSource | Web           | Read Only | PICKLIST   | <input type="checkbox"/> | 2     |
| <a href="#">Edit</a>   <a href="#">Del</a> | <a href="#">Annual Revenue</a> | AnnualRevenue | 0.00          | Required  | CURRENCY   | <input type="checkbox"/> | 3     |
| <a href="#">Edit</a>   <a href="#">Del</a> | <a href="#">Billing City</a>   | BillingCity   |               |           | STRING     | <input type="checkbox"/> | 4     |

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**iClone Related Lists** [Configure Related Lists](#) [iClone Related Lists Help](#) 

No records to display

2. Select related list/child object from the dropdown. Just like you configured the fields for parent object in step 2, configure child object fields too. For each child object, you can further specify if the records are selected by default at time of cloning and what is the display order, if multiple child objects are configured.

Click "Quick Save" to commit the changes and configure other child objects or "Save" to go back to the parent object.

This is only applicable for bulk cloning child records.

Click [here](#) to go back to previous page.

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### Select Account related list (The field in parenthesis connects Account and the child object)

Opportunity (Account ID) ▼

By default select all "Opportunity" records while cloning

Select child object (related list) and record type , if any

### Configure Opportunity fields

| <input type="checkbox"/> | Order | Name          | API Name     | Default Value            | Type         | Erase                               | Hide Field               | Use First as Master      | Field Type | Custom?                  |
|--------------------------|-------|---------------|--------------|--------------------------|--------------|-------------------------------------|--------------------------|--------------------------|------------|--------------------------|
| <a href="#">Remove</a>   | 1     | Amount        | Amount       | <input type="text"/>     | --None-- ▼   | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | CURRENCY   | <input type="checkbox"/> |
| <a href="#">Remove</a>   | 2     | Close Date    | CloseDate    | 11/17/2015 [ 3/22/2016 ] | Required* ▼  | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | DATE       | <input type="checkbox"/> |
| <a href="#">Remove</a>   | 3     | Description   | Description  | test                     | --None-- ▼   | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | TEXTAREA   | <input type="checkbox"/> |
| <a href="#">Remove</a>   | 4     | Price Book ID | Pricebook2Id |                          | Read Only* ▼ | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | REFERENCE  | <input type="checkbox"/> |
| <a href="#">Remove</a>   | 5     | Campaign      |              |                          |              | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | REFERENCE  | <input type="checkbox"/> |



3. Below is how a configured object looks like. You can configure more fields or child objects by following above steps.

“Record Type” will only have a value, if they are enabled for that object. For e.g. in below screen, Account has “End Customer” record type already defined. This is useful to show record type specific configuration to end users while cloning. For e.g. you can follow above steps to configure Account object but for different record type, let’s say “Super Customer”.

The screenshot displays the configuration page for an iClone object named 'Account'. The top navigation bar includes 'Opportunities', 'Products', 'iClone', and 'Reports'. The main content area is divided into several sections:

- iClone Detail:** Contains fields for Name (Account), API Name (Account), and Parent Object. The 'Type' dropdown is set to 'Parent' and the 'Record Type' dropdown is set to 'End Customer'. Buttons for 'Edit', 'Clone', and 'Delete' are present.
- System Information:** Similar to the detail section, it includes 'Edit', 'Clone', and 'Delete' buttons.
- iClone Fields:** A table listing fields for the object.
 

| Action     | Name                           | API Name      | Default Value | Type     | Field Type | Custom?                  | Order |
|------------|--------------------------------|---------------|---------------|----------|------------|--------------------------|-------|
| Edit   Del | <a href="#">Account Number</a> | AccountNumber |               |          | STRING     | <input type="checkbox"/> | 1     |
| Edit   Del | <a href="#">Account Source</a> | AccountSource | Web           | Required | PICKLIST   | <input type="checkbox"/> | 2     |
| Edit   Del | <a href="#">Annual Revenue</a> | AnnualRevenue | 0.00          | Required | CURRENCY   | <input type="checkbox"/> | 3     |
| Edit   Del | <a href="#">Billing City</a>   | BillingCity   |               |          | STRING     | <input type="checkbox"/> | 4     |
- iClone Related Lists:** A table listing related objects.
 

| Action     | Name   | API Name    | Relationship Field | Record Type | Default selected?                   | Order |
|------------|--|-------------|--------------------|-------------|-------------------------------------|-------|
| Edit   Del | <a href="#">Opportunity (Account ID)</a>       | Opportunity | AccountId          | Direct      | <input type="checkbox"/>            | 1     |
| Edit   Del | <a href="#">Task (Opportunity/Account ID)</a>  | Task        | WhatId             | N/A         | <input type="checkbox"/>            | 2     |
| Edit   Del | <a href="#">Event (Opportunity/Account ID)</a> | Event       | WhatId             | N/A         | <input checked="" type="checkbox"/> | 3     |

## Cloning a record




Now end users can clone Account with above configured related lists and fields in just couple of clicks. Just go to Account record and click "iClone".

[+ Show Feed](#) [+ Follow](#)

[Contacts \[2\]](#) | [Contact Roles \[1\]](#) | [Opportunities \[2\]](#) | [Cases \[2\]](#) | [Open Activities \[0\]](#) | [Activity History \[4\]](#) | [Notes & Attachments \[2\]](#) | [Partners \[1\]](#)

### Account Detail

[Edit](#) [Delete](#) [iClone](#)

|   |   |  |
|---|---|--|
| Account Owner   |  <a href="#">ISVforce Partner</a> <a href="#">[Change]</a> | Rating  |
| Account Name  | sForce <a href="#">[View Hierarchy]</a>   | Phone (415) 901-7000   |
| Account Source  | Web   | Fax (415) 901-7002   |
| Parent Account  |   | Website <a href="http://www.sforce.com">http://www.sforce.com</a>                          |
| Account Number  |   | Ticker Symbol  |
| Account Site  |   | Ownership  |
| Type  |   | Employees  |
| Industry  |   | SIC Code   |
| Annual Revenue  | \$1,000   |  |
| Cloned from  |   |  |
| Billing Address   | The Landmark @ One Market<br>San Francisco, CA 94087<br>US  | Shipping Address   |
| Created By  | <a href="#">ISVforce Partner</a> , 8/21/2012 1:56 PM  | Last Modified By <a href="#">ISVforce Partner</a> , 3/12/2013 2:27 PM                      |
| Description   |   |  |

[Edit](#) [Delete](#) [iClone](#)

## Messages

- Make sure you have selected (*column 1*) the records you want to clone. Click *Select All* to select all records.
- Records that are not selected are greyed out and will not be cloned.
- Please contact your system administrator if you need to configure related lists or fields.

Click [here](#) to go back to previous page.

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Save

## New Account

|                      |                |                |               |
|----------------------|----------------|----------------|---------------|
| Account Number       | Account Source | Annual Revenue | Billing City  |
| <input type="text"/> | Web            | 1,000          | San Francisco |

## Related Lists

### Opportunity (Account ID) Records. Record Type: Direct

| Select All               | Account ID | Amount    | Description        |
|--------------------------|------------|-----------|--------------------|
| <input type="checkbox"/> | sForce     | 60,000.00 | Cloned Opportunity |
| <input type="checkbox"/> | sForce     | 60,000.00 | Cloned Opportunity |

### Task (Opportunity/Account ID) Records. Record Type: N/A

| Select All               | Due Date Only         | Call Result | Description | Priority |
|--------------------------|-----------------------|-------------|-------------|----------|
| <input type="checkbox"/> | 3/9/2013 [ 3/9/2013 ] |             |             | Normal   |

### Event (Opportunity/Account ID) Records. Record Type: N/A

| Unselect All                        | Description | Duration |
|-------------------------------------|-------------|----------|
| <input checked="" type="checkbox"/> |             | 60       |

## Track cloning

You can track the original record from which current record was cloned. All you need is a lookup field to same object with API name "Cloned\_from\_\_c" and the app will take care of the rest. We have included the field for Account object, you can do the same for any object that you want to track. Make sure to add this field to the page layouts.

| Account Custom Fields & Relationships      |                    |                          |                 |
|--|--------------------|--------------------------|-----------------|
| Action                                     | Field Label        | API Name                 | Data Type       |
| <a href="#">Edit</a>   <a href="#">Del</a> | <u>Cloned from</u> | sfcloud1__Cloned_from__c | Lookup(Account) |



## Other Standard objects

The button already exists for these standard Salesforce objects: Task, Event, Lead, Account, Contact, and Opportunity.

All you need to do is go to the specific page layout, and drag the “iClone” button to the page. Please see below screen shot for Account page layout. You can follow same step for any standard object mentioned above.

The screenshot illustrates the process of adding an iClone button to a page layout. The interface is divided into several sections:

- App Setup (Left Sidebar):** Contains a search bar for "page layout" (5) and a list of categories. "Page Layouts" under "Accounts" is highlighted with a red box and number 1.
- Buttons (Left Sidebar):** The "Buttons" category is highlighted with a red box and number 2.
- Search Bar:** A search bar with "iClone" entered is highlighted with a red box and number 3.
- Buttons List:** A list of buttons is shown, with "iClone" highlighted by a red box and number 3.
- Account Detail (Main Area):** Shows the "Account Detail" section with a "Custom Buttons" section containing an "iClone" button, highlighted with a red box and number 4.
- Drag Action:** A red arrow points from the "iClone" button in the list to the "iClone" button in the "Custom Buttons" section, with a text box saying "Drag the button to the page." (4).

To add “iClone” button to any other standard object, go to App Setup >> Customize >> Select the standard object >> Buttons and Links >> New. Now follow from step number 2 below.

## Custom objects

1. Go to the custom object to which you need to add the button. Hover the mouse over “Custom Buttons and Links” list and click “New”. Please see below screen shot.

The screenshot shows the Salesforce iClone interface. The top navigation bar includes Home, Leads, Accounts, Opportunities, Products, Reports, and iClone. The left sidebar has a search bar with 'objects' and a 'Create' section with 'Objects' highlighted in red. The main content area is for 'My Custom Object' and includes a 'Custom Buttons and Links' section with a 'New' button highlighted in yellow. Below this, a table shows details for 'My Custom Object'.

|                   |                                     |                     |                                     |
|-------------------|-------------------------------------|---------------------|-------------------------------------|
| Object Name       | My_Custom_Object                    | Track Activities    | <input type="checkbox"/>            |
| API Name          | My_Custom_Object__c                 | Track Field History | <input type="checkbox"/>            |
| Deployment Status | Deployed                            |                     |                                     |
| Help Settings     | Standard salesforce.com Help Window |                     |                                     |
| Created By        | ISVforce Partner, 1/23/2013 5:13 PM | Modified By         | ISVforce Partner, 1/23/2013 5:13 PM |

2. Enter the details as per below screen shot.

Name and Label: iClone

Display Type: Detail Page Button

Behavior: Execute Javascript

Content Source: OnClick Javascript

Content:

```
{!REQUIRESCRIPT("/soap/ajax/14.0/connection.js")}
```

```
{!REQUIRESCRIPT("/soap/ajax/14.0/apex.js")}
```

```
window.location = '/apex/sfcloud1__iClone?wrapMassAction=1&scontrolCaching=1&records={!My_Custom_Object__c.Id}';
```

**Custom Button or Link Edit**

Save
Quick Save
Preview
Cancel

Label

Name  i

Namespace Prefix

Description

Display Type

Detail Page Link [View example](#)  
 Detail Page Button [View example](#)  
 List Button [View example](#)

Behavior  [View Behavior Options](#)

Content Source

---

Select Field Type

Insert Field

Insert Operator

Clone individual records (Text) =

```

{!REQUIRESRIPT("/soap/ajax/14.0/connection.js")}
{!REQUIRESRIPT("/soap/ajax/14.0/apex.js")}

window.location = '/apex/sfcloud1__iClone?wrapMassAction=1&controlCaching=1&records={!Account.Id}';

```

3. Add the button to the page layouts.

Hope this guide helps in what you are trying to achieve. If you need any further assistance please contact us [support@gocloudz.com](mailto:support@gocloudz.com)