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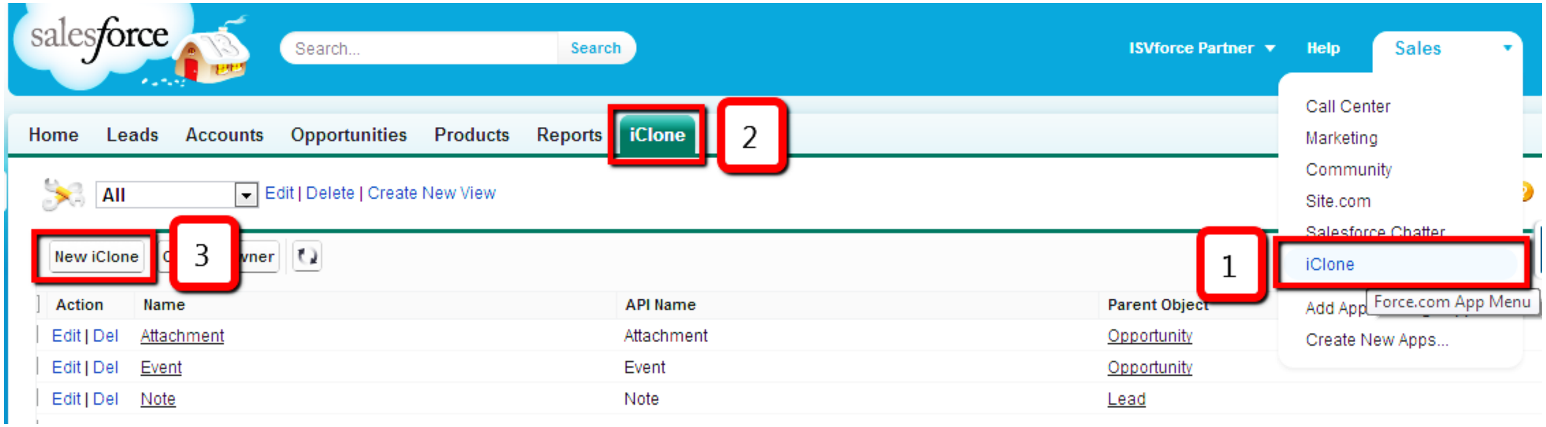
Key Features

- *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.*



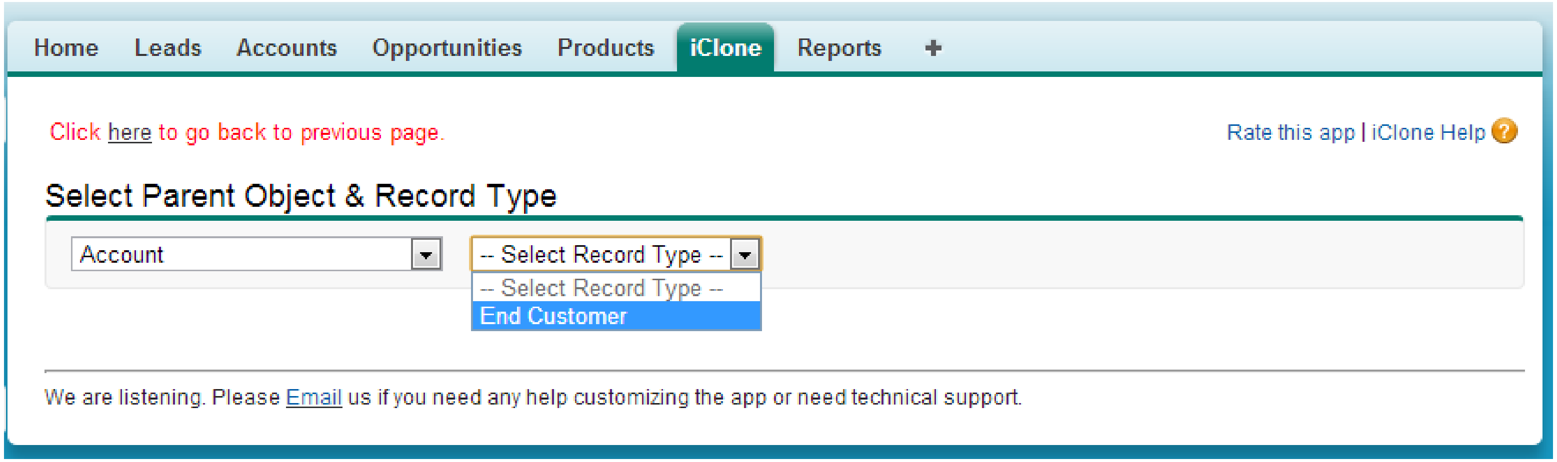
Note: If you see documentation when you select the app, scroll to bottom-right >> select "go to app" or "do not show this page again"

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

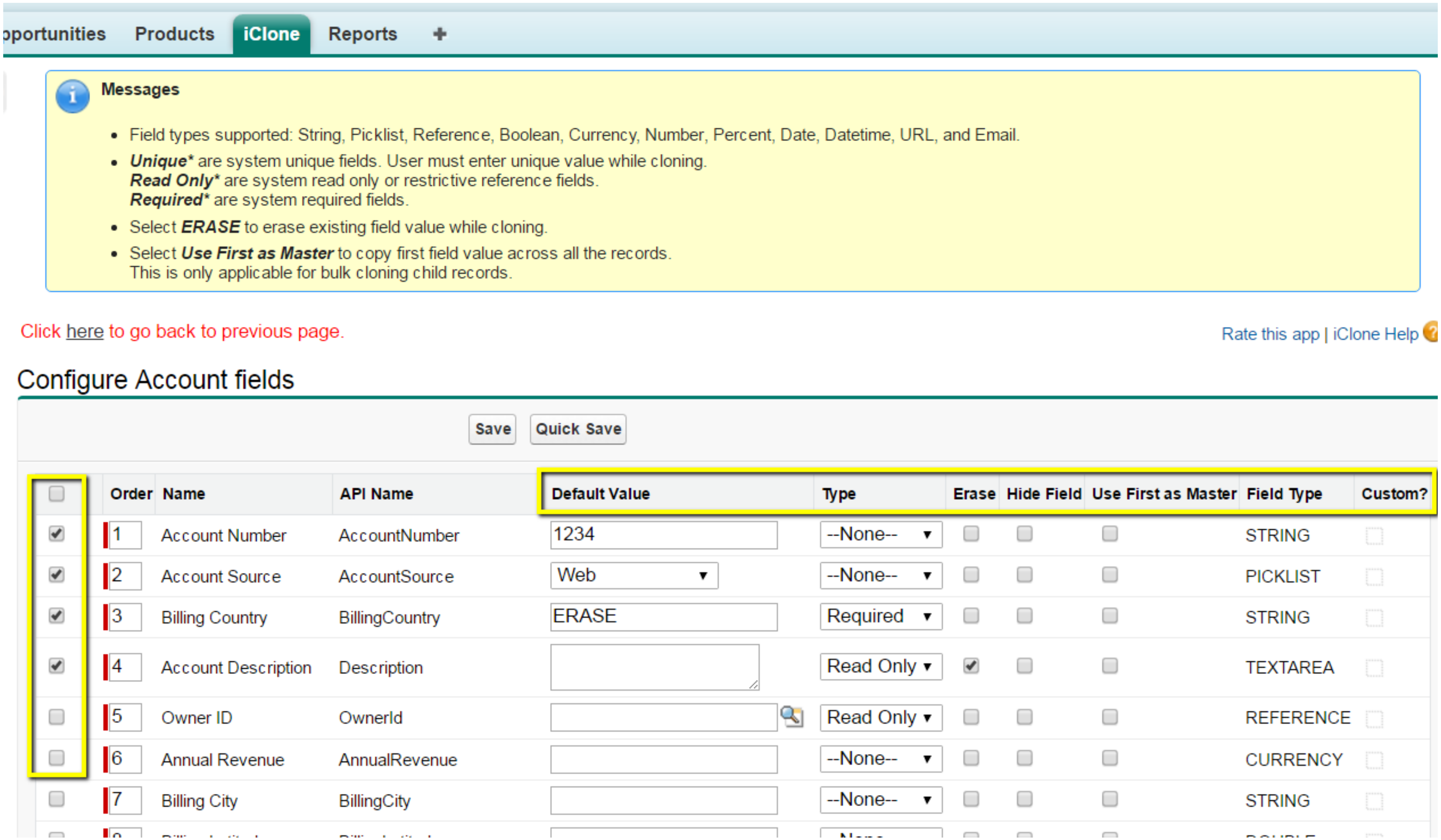
Configuring Parent Object

1. *Select the object from the picklist that you want end users to clone. If it is has record type, select that.*

   It will automatically take you to VF page to configure fields for the object.



2. *Custom VF page for configuring fields*

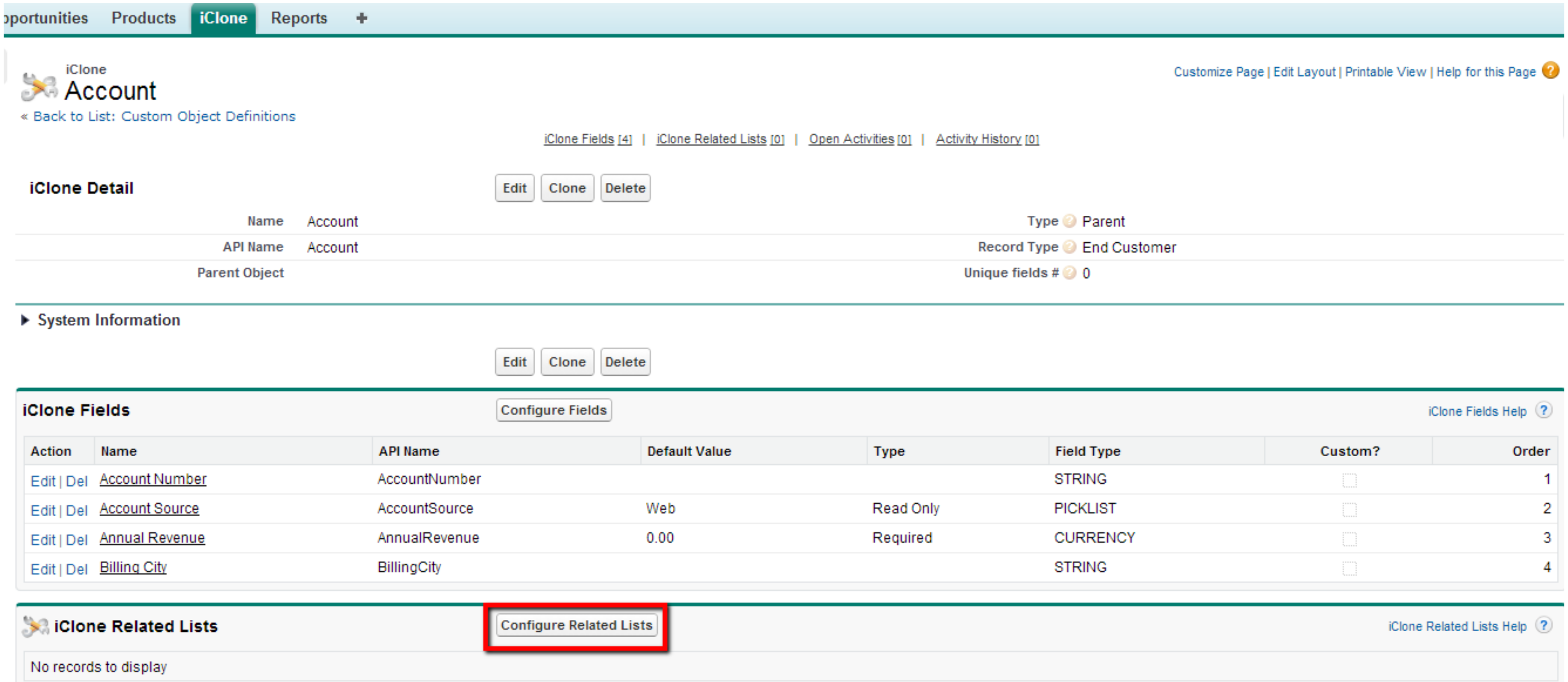


a. *Select only those fields that need to be updated while cloning. Other field values will be copied as is*
b. *Provide default field value*
c. *Mark fields as "Read Only" or "Required"*
d. *Select "ERASE" to blank existing field value. Erase and Required will ensure new value is always entered when 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*

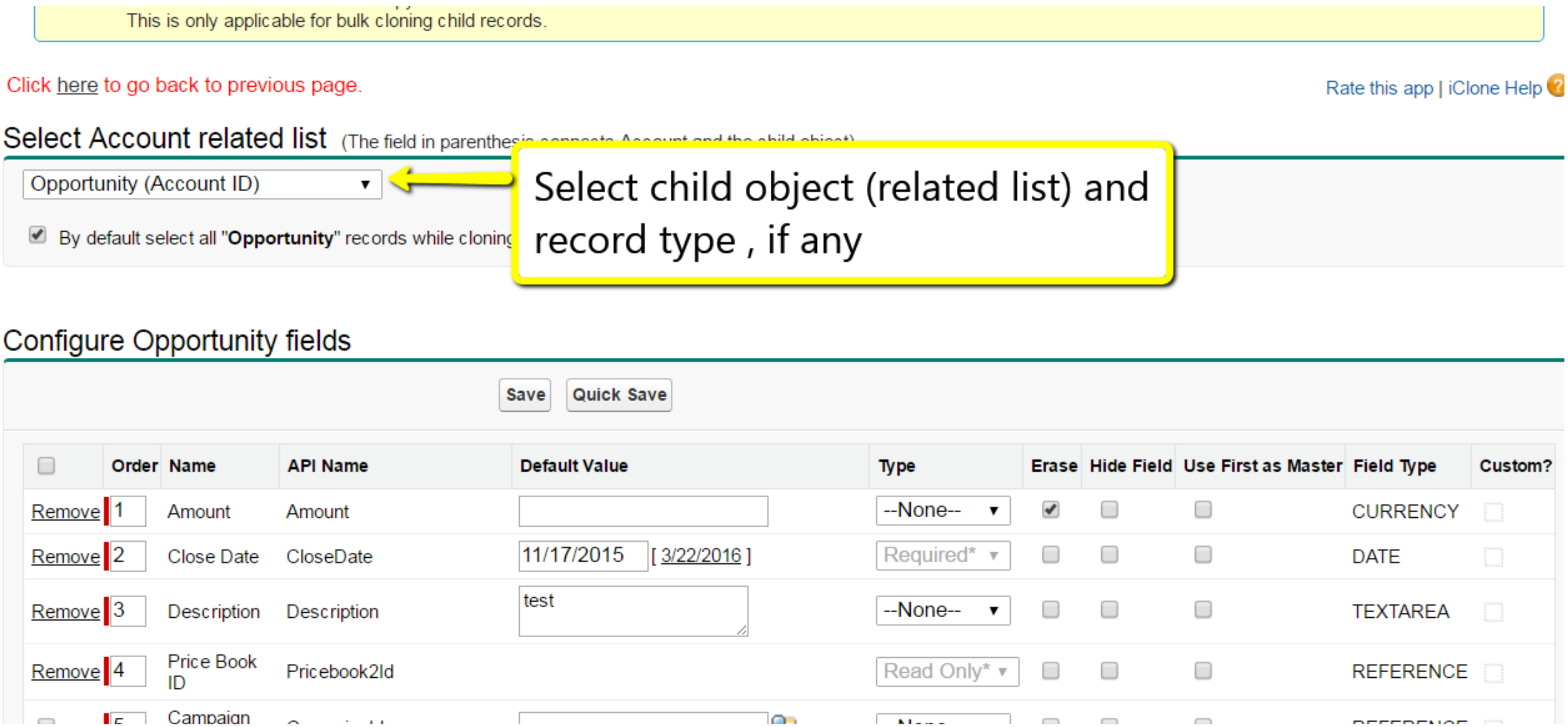
Configuring Child Object (Related List)

1. *Scroll down to "iCLone Related Lists" section and click "Configure Related Lists".*



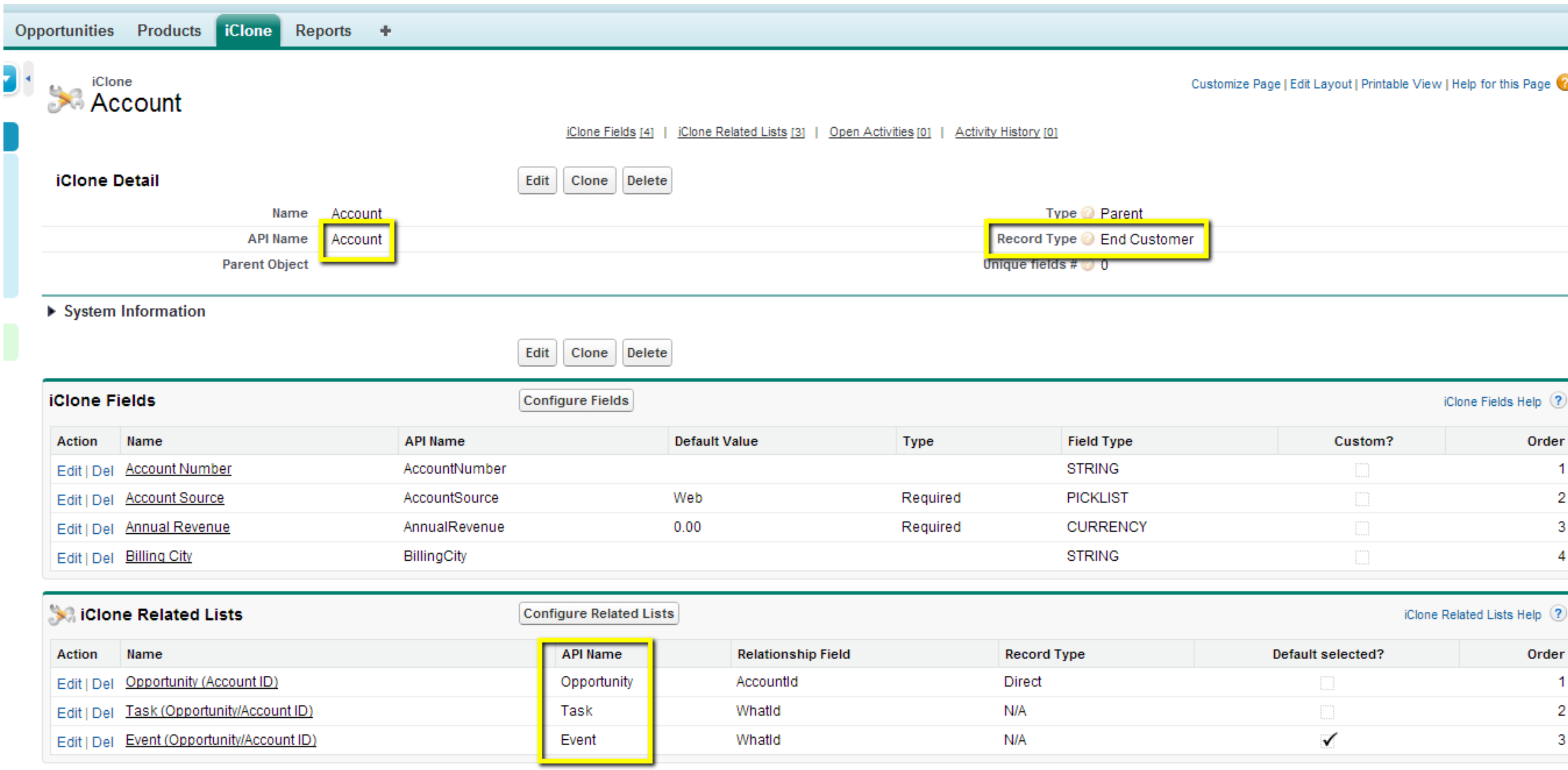
2. *Select related list/child object from the dropdown. Just like you configured the fields for parent object in step 2, configure child object fields too. For each child object, you can further specify if the records are selected by default at time of cloning and what is the display order, if multiple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



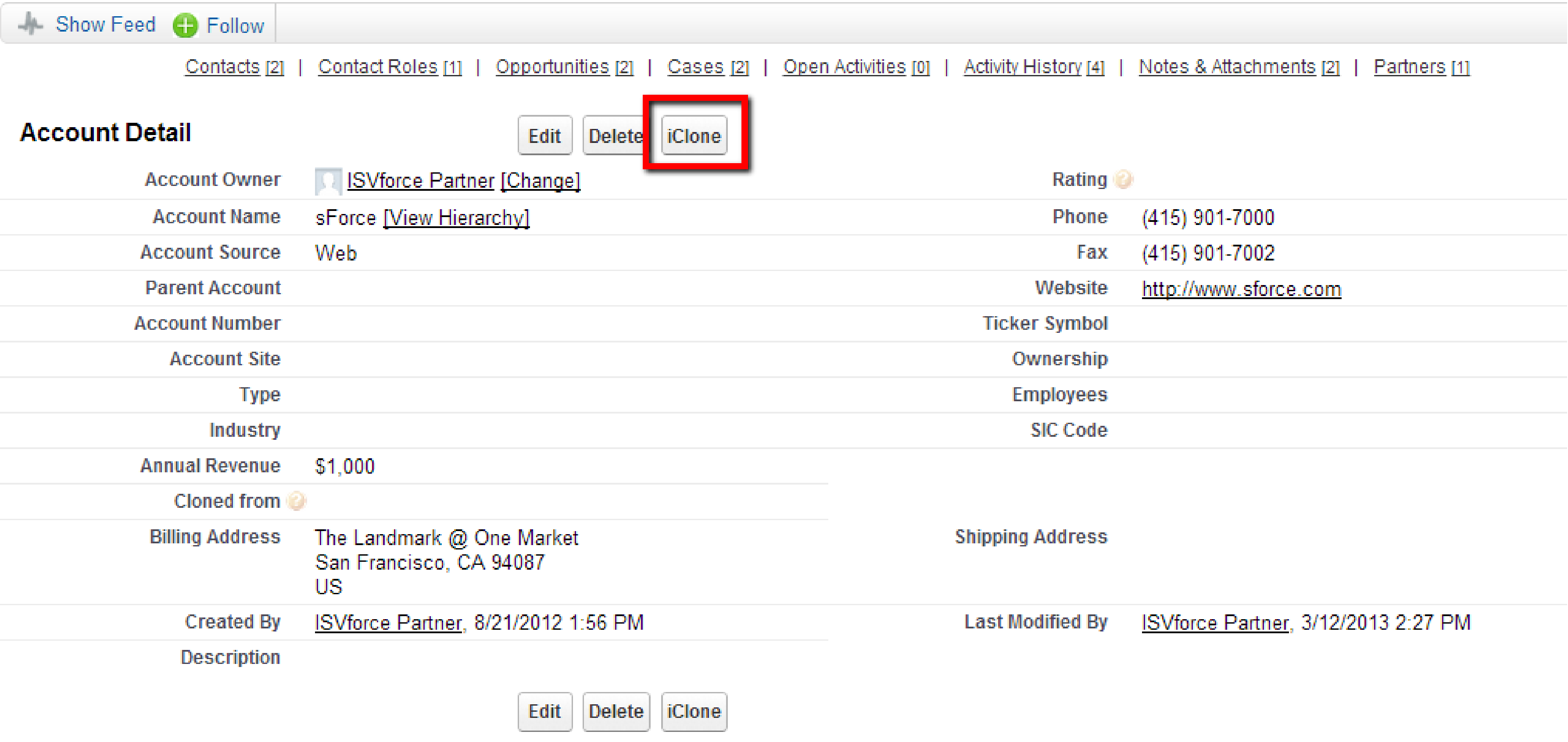
3. *Below is how a configured object looks like. You can configure more fields or child objects by following above steps.*

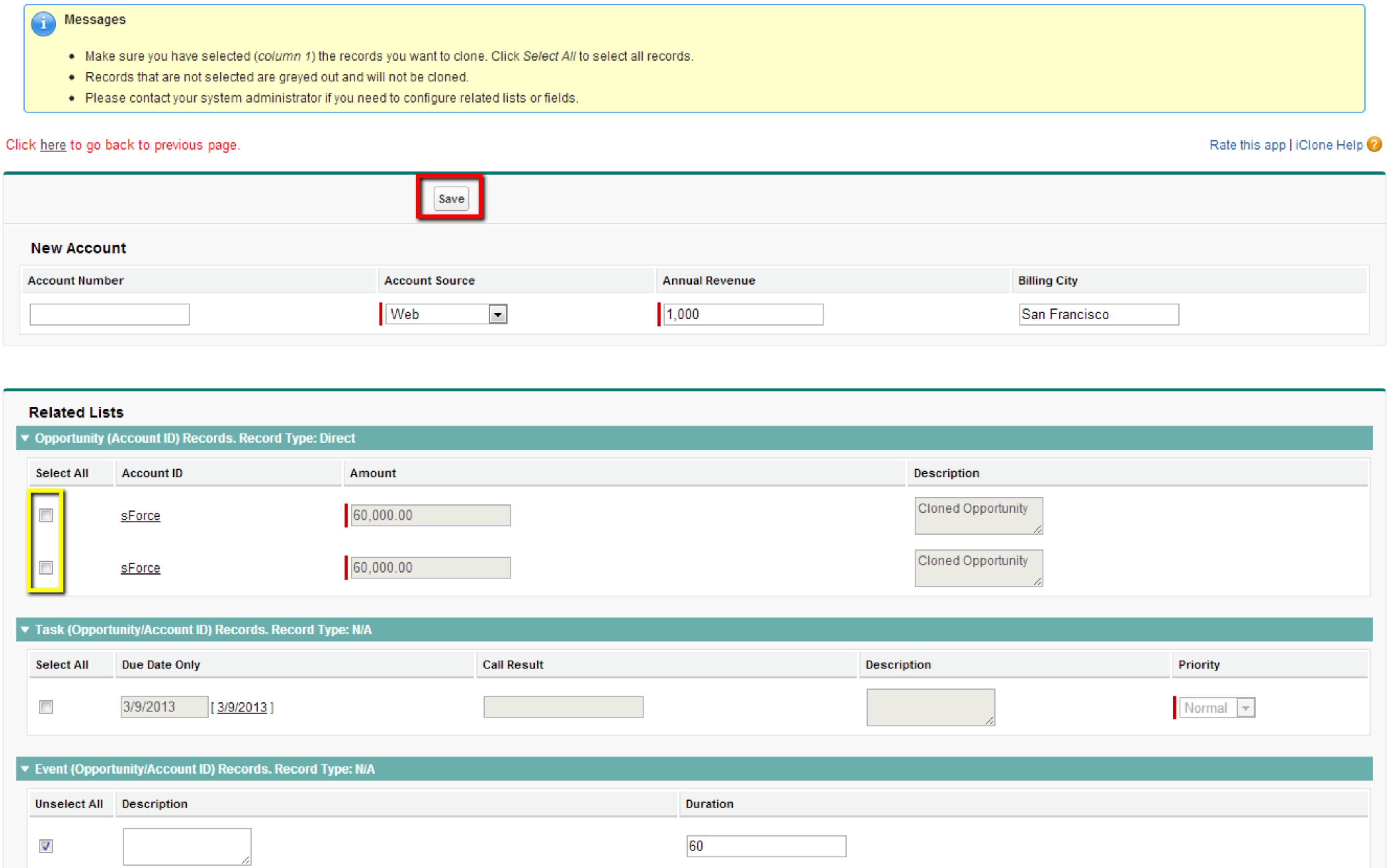
   "Record Type" will only have a value, if they are enabled for that object. For e.g. in below screen, Account has "End Custome r" record type already defined. This is useful to show record type specific configuration to end users while cloning. For e.g. you can follow above steps to configure Account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



Cloning a record

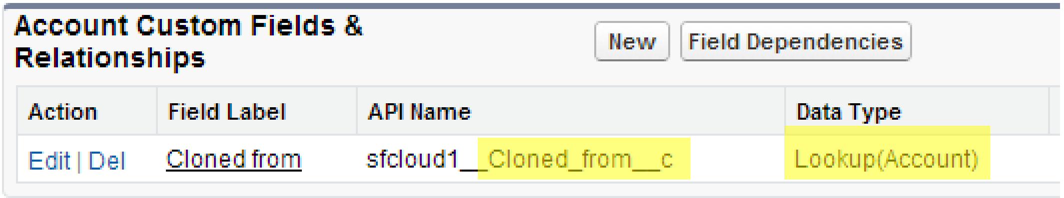
Now end users can clone Account with above configured related lists and fields in just couple of clicks. Just go to Account record and click "iClone".




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.
Rate this app | iClone Help
Save
New Account
Account Number
Account Source
Annual Revenue
Billing City
Web
1,000
San Francisco
Related Lists
Opportunity (Account ID) Records. Record Type: Direct
Select All
Account ID
Amount
Description
sForce
60,000.00
Cloned Opportunity
sForce
60,000.00
Cloned Opportunity
Task (Opportunity/Account ID) Records. Record Type: N/A
Select All
Due Date Only
Call Result
Description
Priority
3/9/2013
[3/9/2013]
Normal
Event (Opportunity/Account ID) Records. Record Type: N/A
Unselect All
Description
Duration
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.



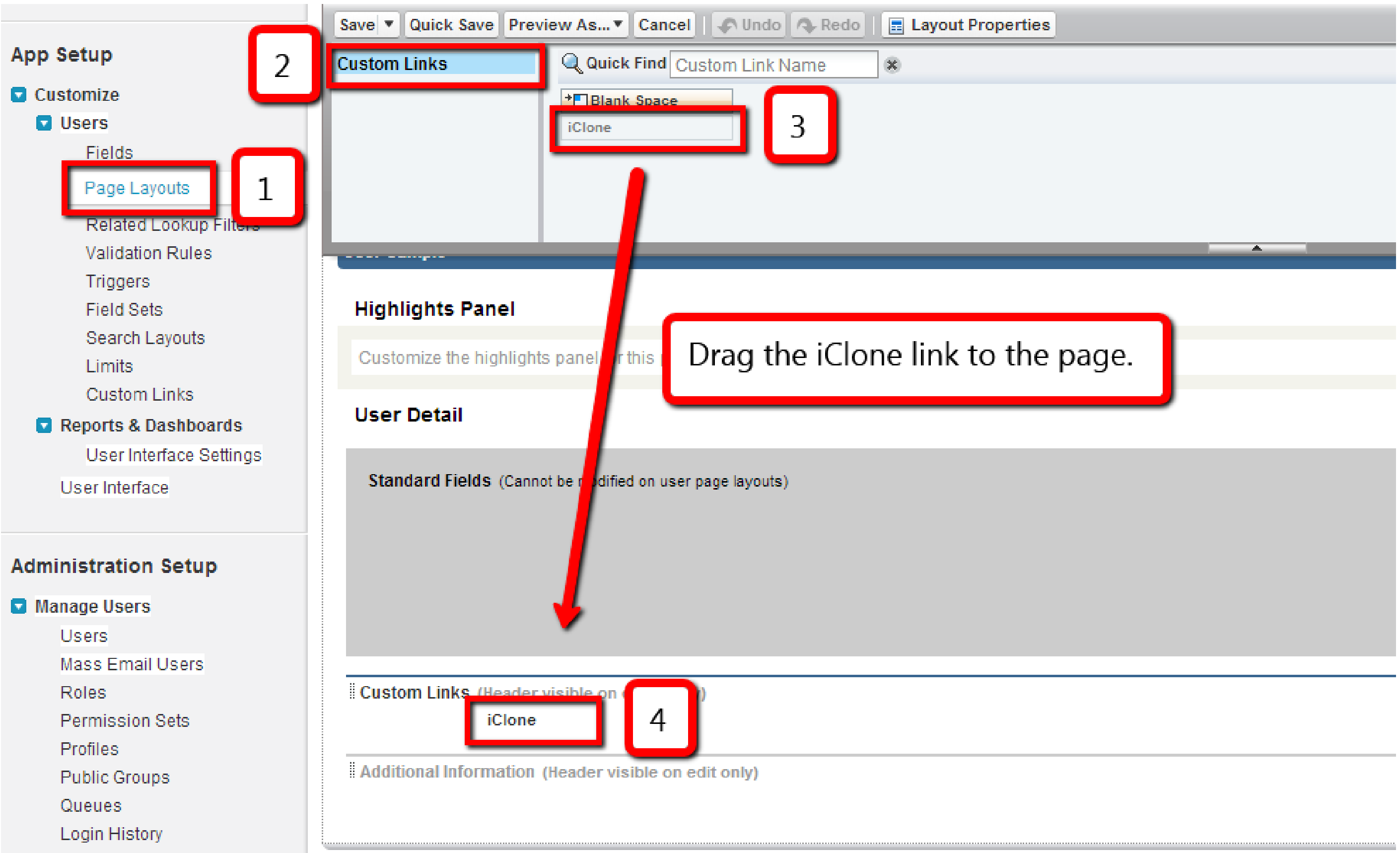
Account Custom Fields & Relationships New Field Dependencies

Action	Field Label	API Name	Data Type
Edit | Del	Cloned from	sfcloud1__Cloned_from__c	Lookup(Account)

How to add "iClone" button or link

Standard User object

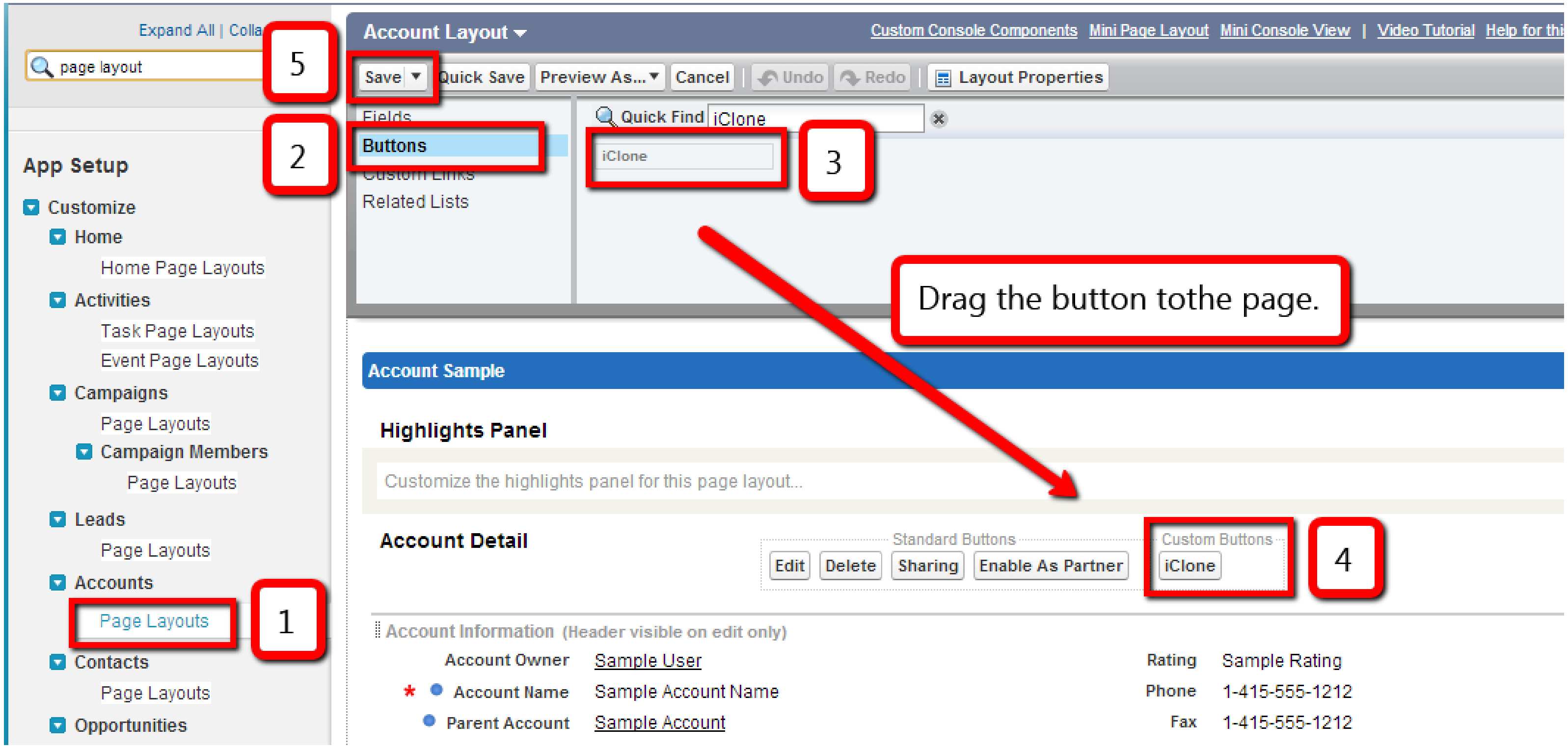
Go to Customize >> Users >> Page Layouts >> Edit and drag the "iClone" link to the page and click "Save". Please see below screen shot.



Other Standard objects

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

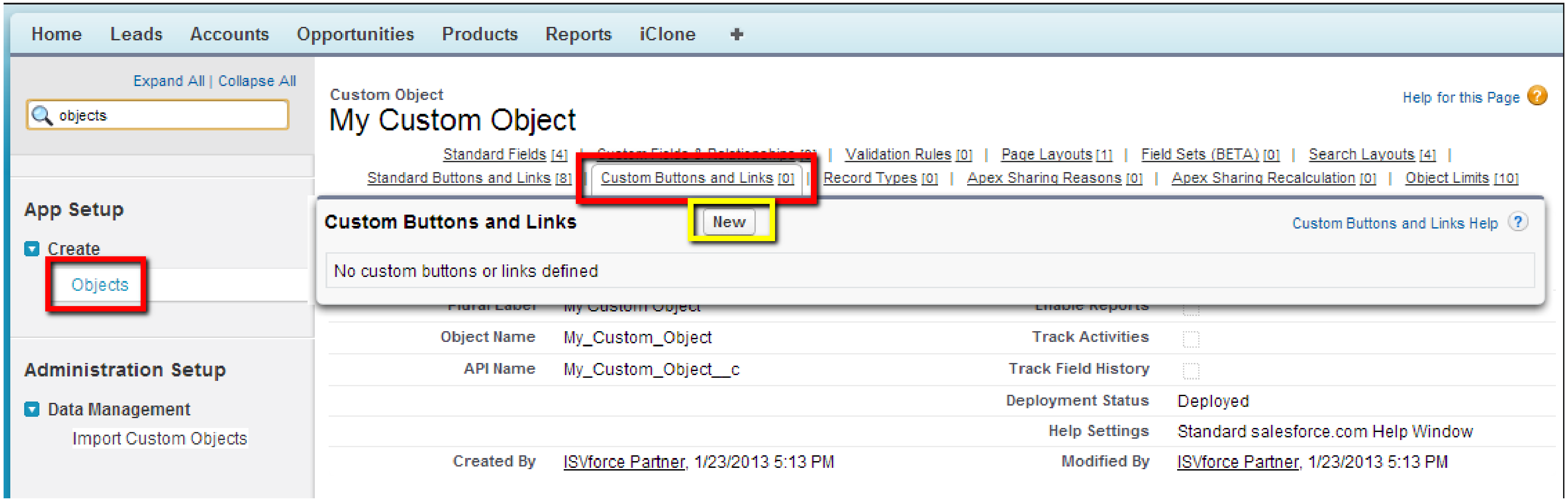
All you need to do is go to the specific page layout, and drag the "iClone" button to the page. Please see below screen shot for Account page layout. You can follow same step for any standard object mentioned above.



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. Hoover the mouse over "Custom Buttons and Links" list and click "New". Please see below screen shot.*



2. *Enter the details as per below screen shot.*

   Name and Label: iClone *Display Type: Detail Page Button*

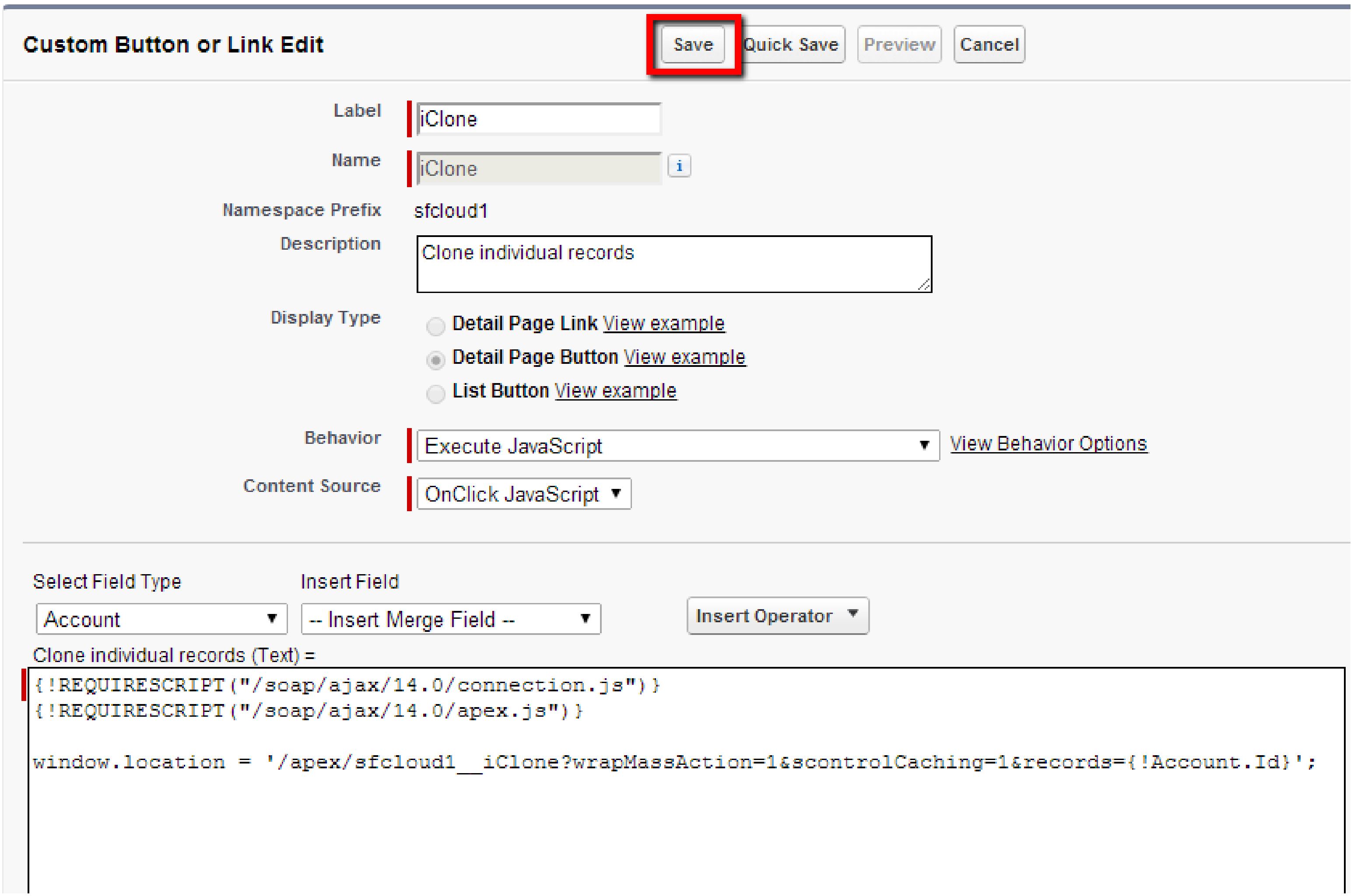
   Behavior: Execute Javascript *Content Source: OnClick Javascript*

   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}';



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