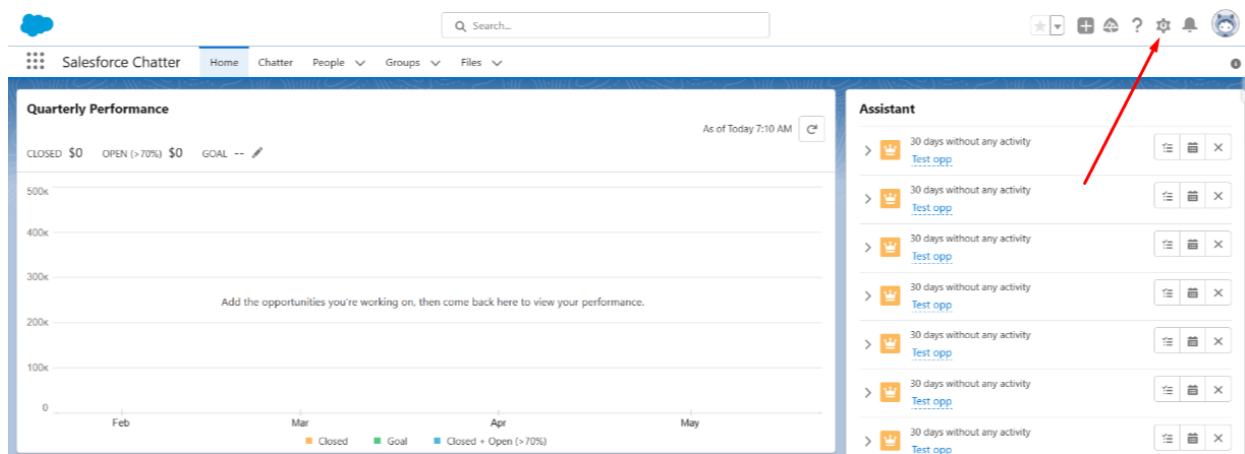
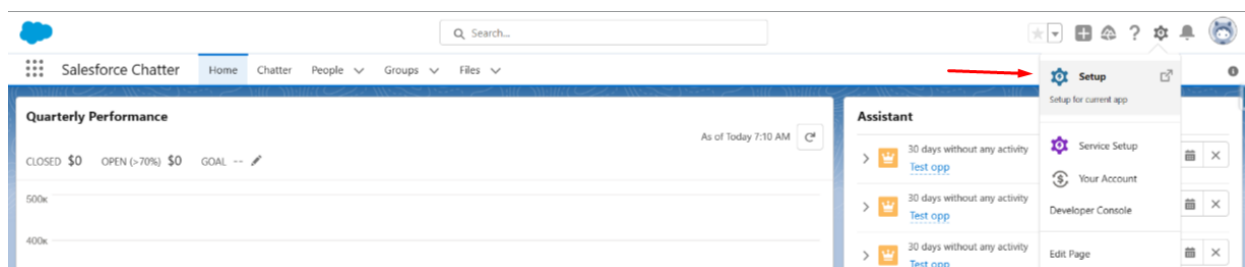


1. How to add the “Dynamic Clone” quick action to the layout.

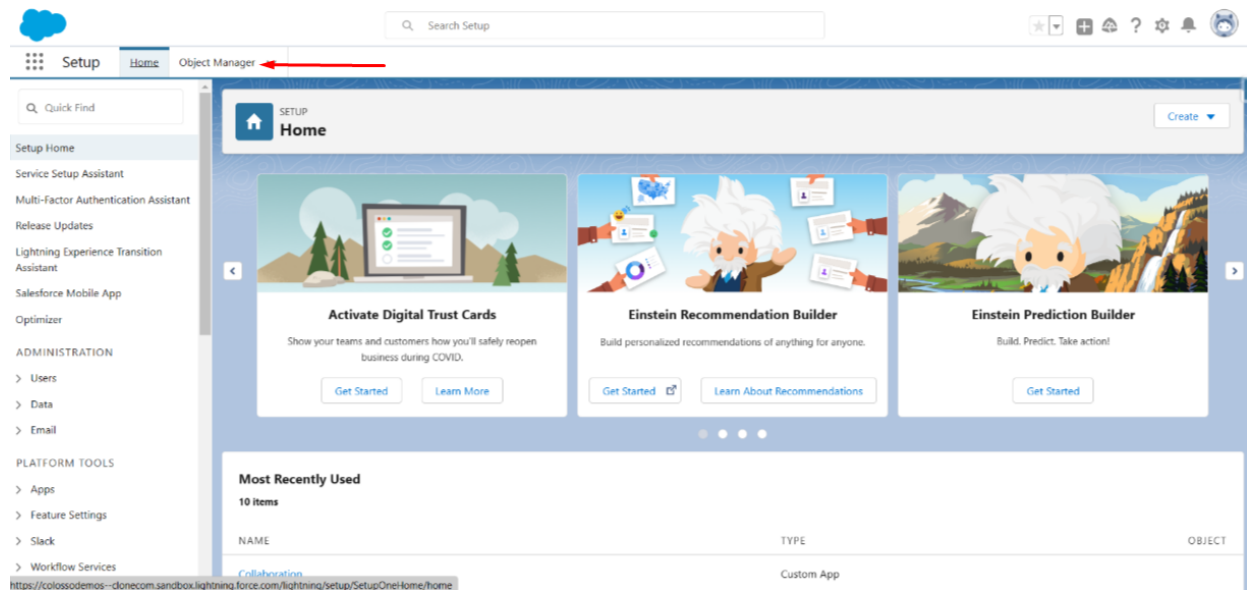
- Click on the “gear” icon at the top right of the Salesforce page.



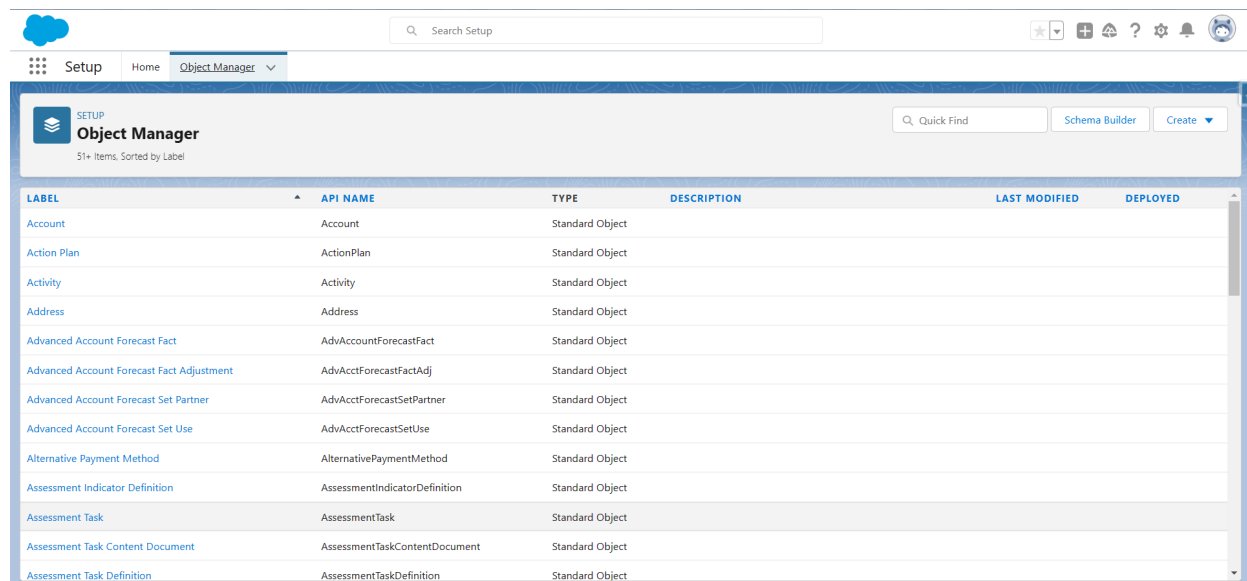
- Click on “Setup”.



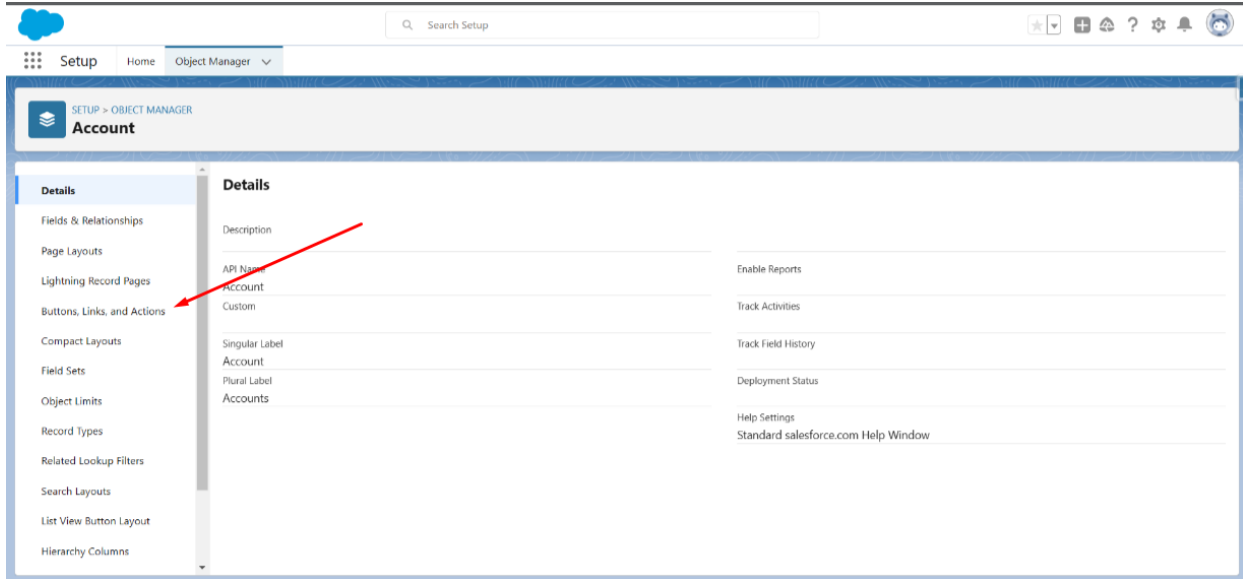
- Click on “Object Manager”.



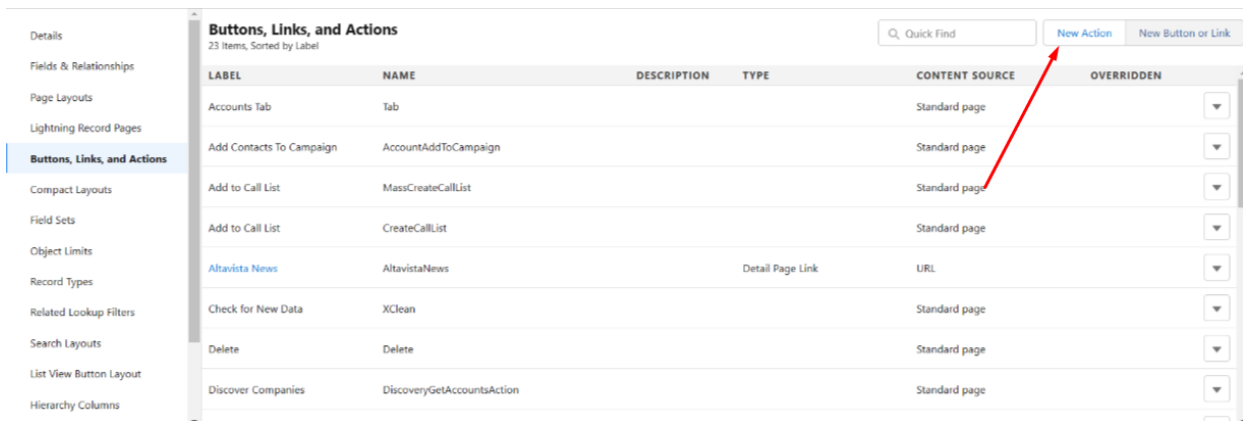
- Look for the object label to which you want to add the quick action and click on it.



- Click on “Buttons, Links, and Actions”.



- Click on “New Action”.



- Change the “Action Type” to the option “Lightning Web Component”.

Account Actions
New Action

Enter Action Information

Object Name: Account

Action Type: Create a Record

Target Object: Create a Record

Standard Label Type: Log a Call

Label: Custom Visualforce

Name: Update a Record

Description: Lightning Component

Create Feed Item: ☒

Success Message:

Icon: Change Icon

- Select the Lightning Web Component “quickclone:cloneComponent”.

Account Actions
New Action

Enter Action Information

Object Name: Account

Action Type: Lightning Web Component

Lightning Web Component: quickclone:cloneComponent

Subtype: Screen Action

Standard Label Type: --None--

Label:

Name:

Description:

Icon: Change Icon

- In the “Label” field type: “Dynamic Clone”.

Account Actions

Account

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Hierarchy Columns

Scoping Rules

Account Actions

New Action

Help for this Page

Enter Action Information

Save Cancel

Object Name Account

Action Type Lightning Web Component

Lightning Web Component quickclone.cloneComponent

Subtype Screen Action

Standard Label Type --None--

Label

Name

Description

Icon Change Icon

Save Cancel

- Click on "Save".

Account Actions

Account

Details

Fields & Relationships

Page Layouts

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Search Layouts

List View Button Layout

Hierarchy Columns

Scoping Rules

Account Actions

New Action

Help for this Page

Enter Action Information

Save Cancel

Object Name Account

Action Type Lightning Web Component

Lightning Web Component quickclone.cloneComponent

Subtype Screen Action

Standard Label Type --None--

Label

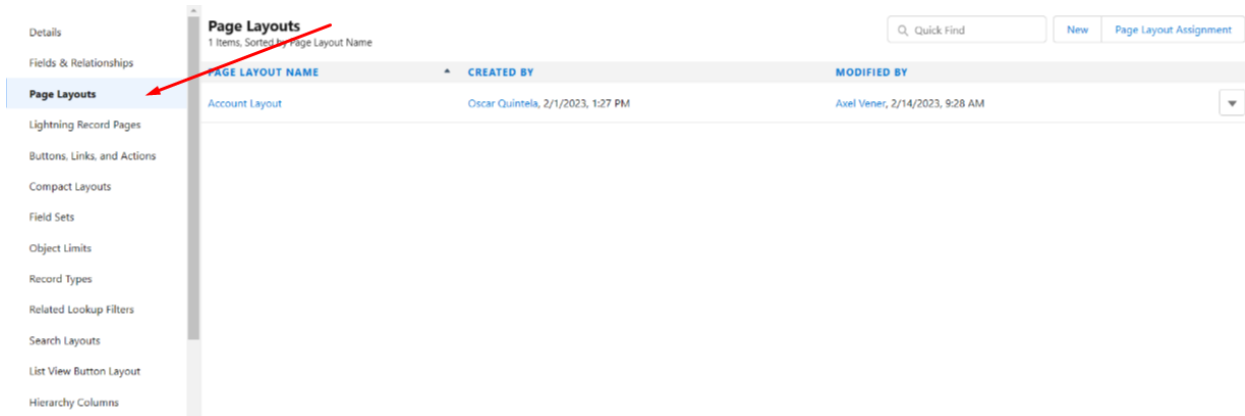
Name

Description

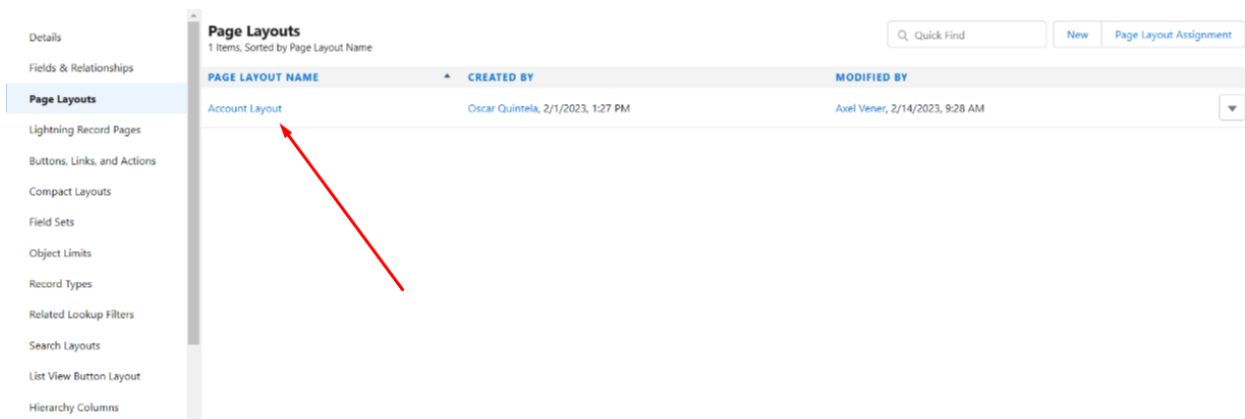
Icon Change Icon

Save Cancel

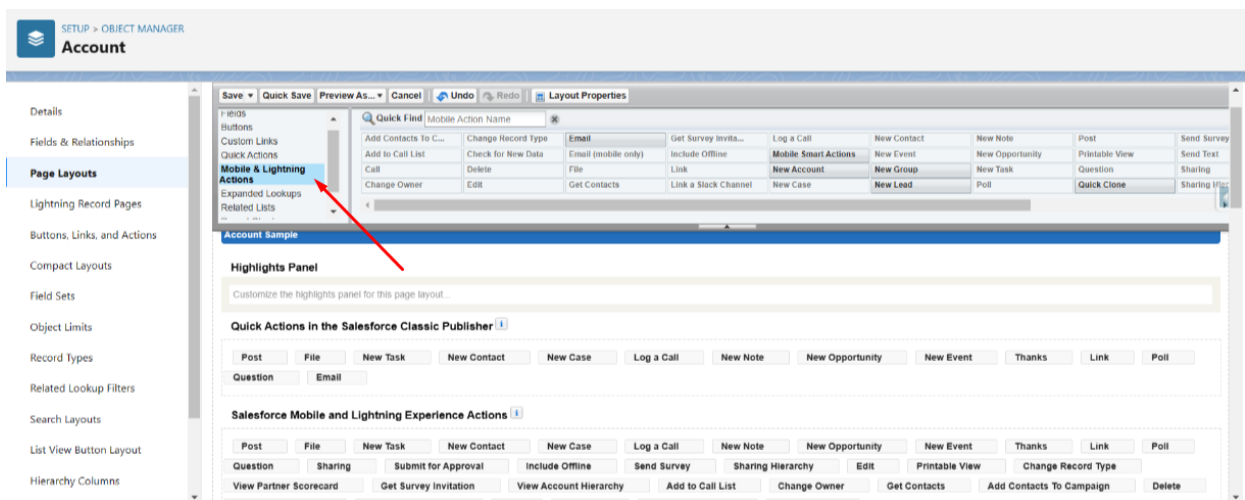
- Click on "Page Layouts".



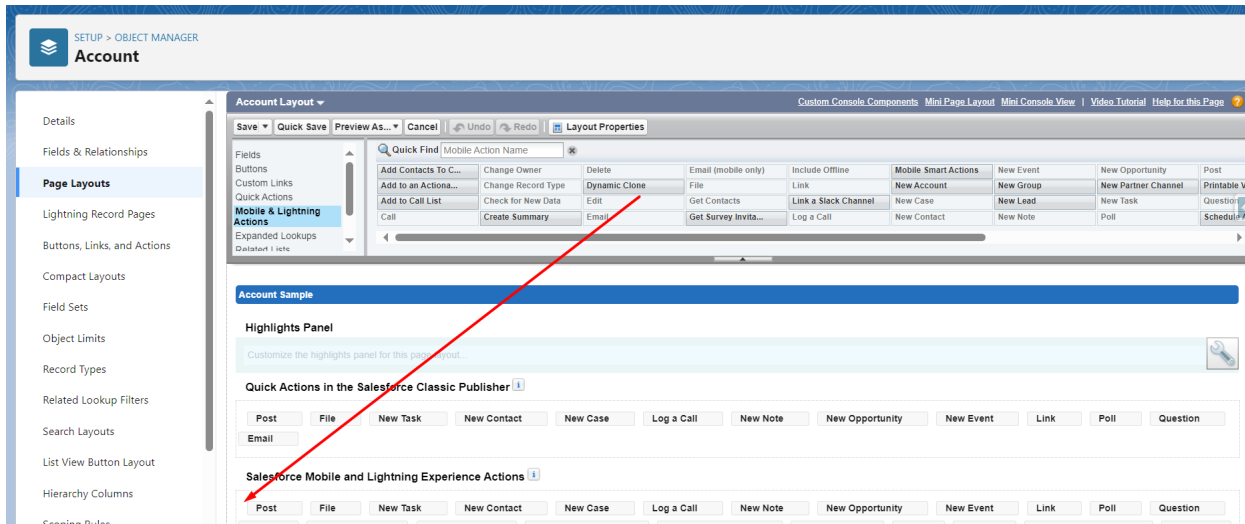
- Click on “Account Layouts”.



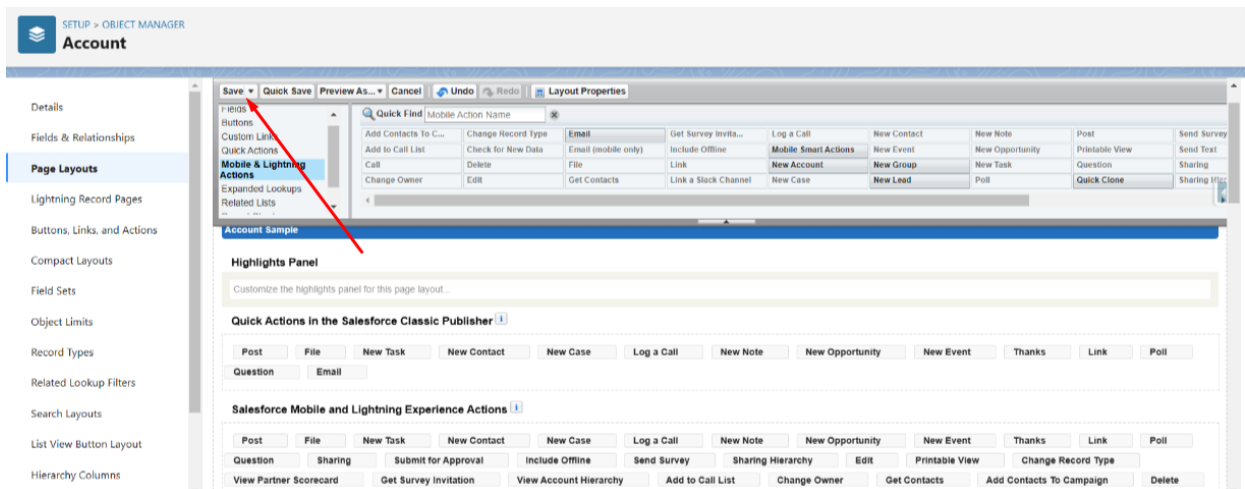
- Click on Mobile & Lightning Actions.



- Drag the quick action named “Dynamic Clone” that we created previously, and drop it into the Salesforce Mobile and Lightning Experience Actions section.



- Click on “Save”.



- Now go back to the Salesforce Home page.
- Go to the Object that you added the Quick Action to.

Accounts							New	Discover Companies	Import	Printable View
All Accounts ▾							Search this list...			
27 items • Sorted by Account Name • Filtered by All accounts • Updated a minute ago										
☐	Account Name ↑	Billing State/Province	Phone	Type	Account Owner Alias	Website				
1	☐ Test Acc		99999	Integrator	avene	test.com				
2	☐ Test Acc			Integrator	avene	test.com				
3	☐ Test Acc			Integrator	avene	test.com				
4	☐ Test Acc		99999	Integrator	avene	test.com				
5	☐ Test Acc			Integrator	avene	test.com				
6	☐ Test Acc				avene	test.com				
7	☐ Test Acc				avene	test.com				
8	☐ Test Acc v2.0				avene	test.com				
9	☐ Test Acc v2.1				avene	test.com				
10	☐ Test Acc v2.1				avene	test.com				
11	☐ Test Acc v2.2				avene	test.com				
12	☐ Test Account v2.0		99999		avene	test.com				
13	☐ Test Account v2.1		99999		avene	test.com				
14	☐ Test Account v2.2		99999		avene	test.com				
15	☐ Test Account v2.26		99999		avene	test.com				

- Enter an existing Account (It could also be an opportunity, contact, lead, etc)

Account

Test Acc

+ Follow

Dynamic Clone

New Contact

New Case

Type

Customer - Channel

Phone

(092) 109-3092

Website

test.com

Account Owner

Axel Vener

Account Site

testsite.com

Industry

Banking

Related

Details

We found no potential duplicates of this Account.

Contacts (0)

New

Opportunities (0)

New

Cases (0)

New

Notes & Attachments (0)

Upload Files

Activity

Chatter

Filters: All time • All activities • All types

Refresh • Expand All • View All

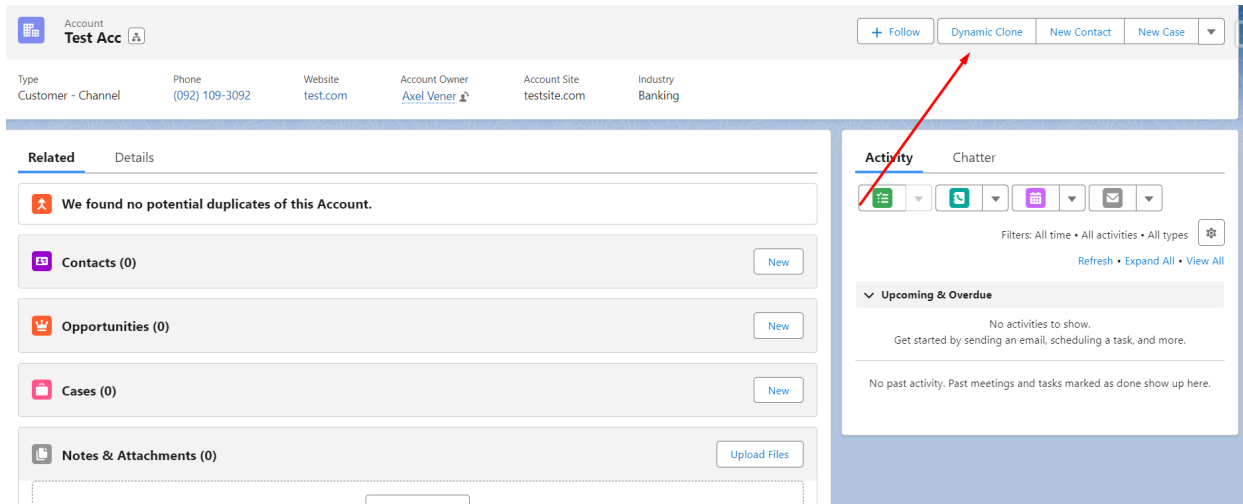
Upcoming & Overdue

No activities to show.

Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

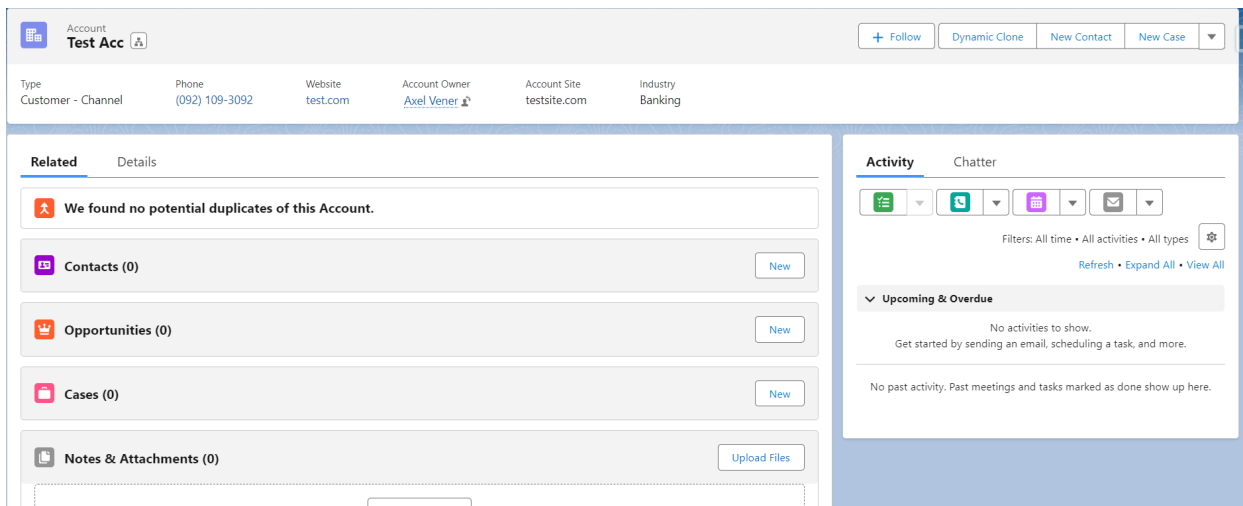
- Confirm that now the button “Dynamic Clone” is shown in the Quick Actions.



2. How to use the “Dynamic Clone” quick action.

Once we’ve added the quick action to the object that we are going to work with, we have to understand what this modal does. With this function, we can clone a record from an object, but we can choose which fields to clone with the record.

- Open an existing record of the object that we are going to work with



- Click on the Dynamic Clone button from the Quick Actions section.

The screenshot shows a Salesforce account record for 'Test Acc'. At the top, there are buttons for '+ Follow', 'Dynamic Clone' (highlighted with a red arrow), 'New Contact', and 'New Case'. Below these are fields for Type (Customer - Channel), Phone ((092) 109-3092), Website (test.com), Account Owner (Axel Vener), Account Site (testsite.com), and Industry (Banking). The main section is divided into 'Related' and 'Details' tabs. Under 'Related', there are sections for 'We found no potential duplicates of this Account.', 'Contacts (0)', 'Opportunities (0)', 'Cases (0)', and 'Notes & Attachments (0)'. On the right, there is an 'Activity' section with a 'Chatter' tab and a list of activities.

- Type the name of the new clone record inside the “Name” field.

The screenshot shows the 'Clone Account' dialog box. It has a header bar with 'Account Owner' (Axel Vener), 'Industry', and 'Billing Address'. The main title is 'Clone Account'. Below the title, there is a 'Name' field with the text 'Test Acc' (highlighted with a red arrow). To the right of the field is a gear icon. At the bottom right, there are 'Cancel' and 'Save' buttons.

- Now click on the Gear icon to see the second window.

This screenshot is identical to the previous one, showing the 'Clone Account' dialog box. A red arrow points to the gear icon next to the 'Name' field, indicating the next step in the process.

- In the second window, we have to uncheck the fields we don't want to be cloned and leave checked the ones we want to clone with the new record. We can also look for the

name of a specific field in the search box (The one signaled by the red arrow in the picture below)

Clone Account

Search 

Please uncheck the fields that you don't want to be cloned with the record

▼ Custom Fields

There are no custom fields to show.

▼ Standard Fields

☒ Account Description	☒ Account Fax
☒ Account Source	☒ Account Type
☒ Annual Revenue	☒ Billing City
☒ Billing Country	☒ Billing Geocode Accuracy

[Back](#) [Cancel](#) [Save](#)

Notice that if there are excluded fields from this object, the fields added to it will not be shown in the Dynamic Clone modal.

Setup Home Object Manager

Account

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Hierarchy Columns

Excluded Fields

Save Cancel Undo Redo Field Set Properties

Quick Find Account Name

Account	Account Owner	Billing City	Billing Longitude	Created By	Description	Industry	Last Modified Date	Parent Account
Account ID	Account Site	Billing Country	Billing State/Pro...	Created Date	Einstein Account ...	Jigsaw Company Id	Last Referenced Date	Phone
Account Name	Account Source	Billing Geocode A...	Billing Street	Data.com Key	Employees	Last Activity	Last Viewed Date	Photo URL
Account Number	Annual Revenue	Billing Latitude	Billing Zip/Posta...	Deleted	Fax	Last Modified By	Ownership	Rating

Drag any of the fields above into the list below.

In the Field Set 1

- Website
- Phone
- Data.com Key
- Fax

If the Excluded Fields field set it's like this, the Dynamic Clone modal will be shown like this (The fields Website, Phone, Data.com Key and Fax won't be shown):

Search...

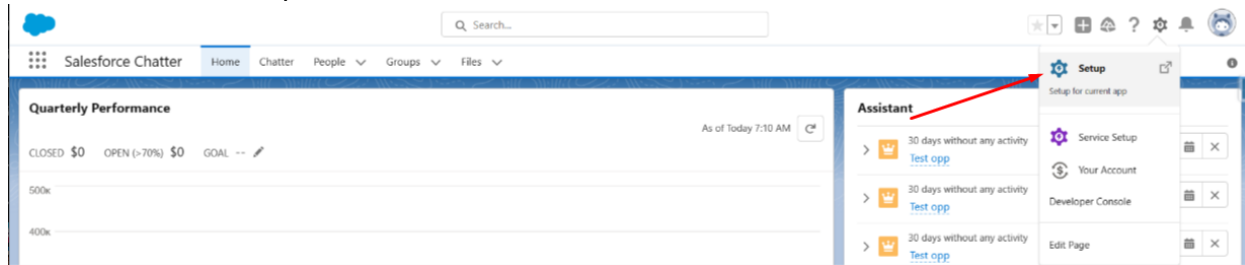
Clone Account

☒ Account Description	☒ Account Source
☒ Account Type	☒ Annual Revenue
☒ Billing City	☒ Billing Country
☒ Billing Geocode Accuracy	☒ Billing Latitude
☒ Billing Longitude	☒ Billing State/Province
☒ Billing Street	☒ Billing Zip/Postal Code
☒ Employees	☒ Industry
☒ Parent Account ID	☒ SIC Description

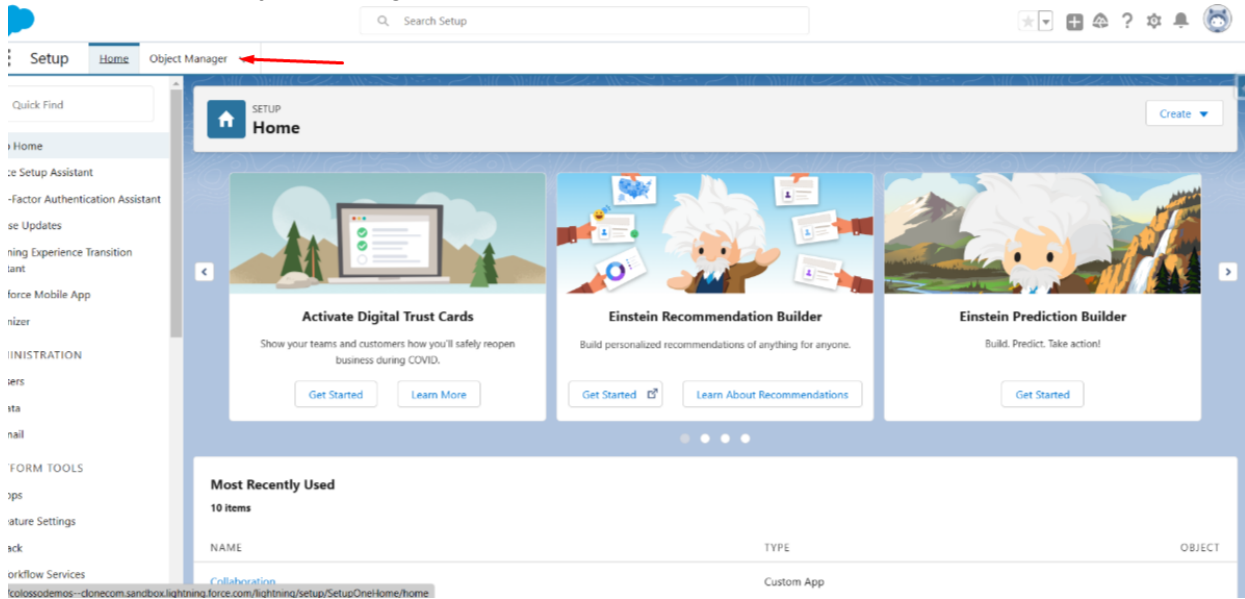
Back Cancel Save

- Once we've already decided which fields we want to clone, we have to click on the "Save" button for the record to clone.

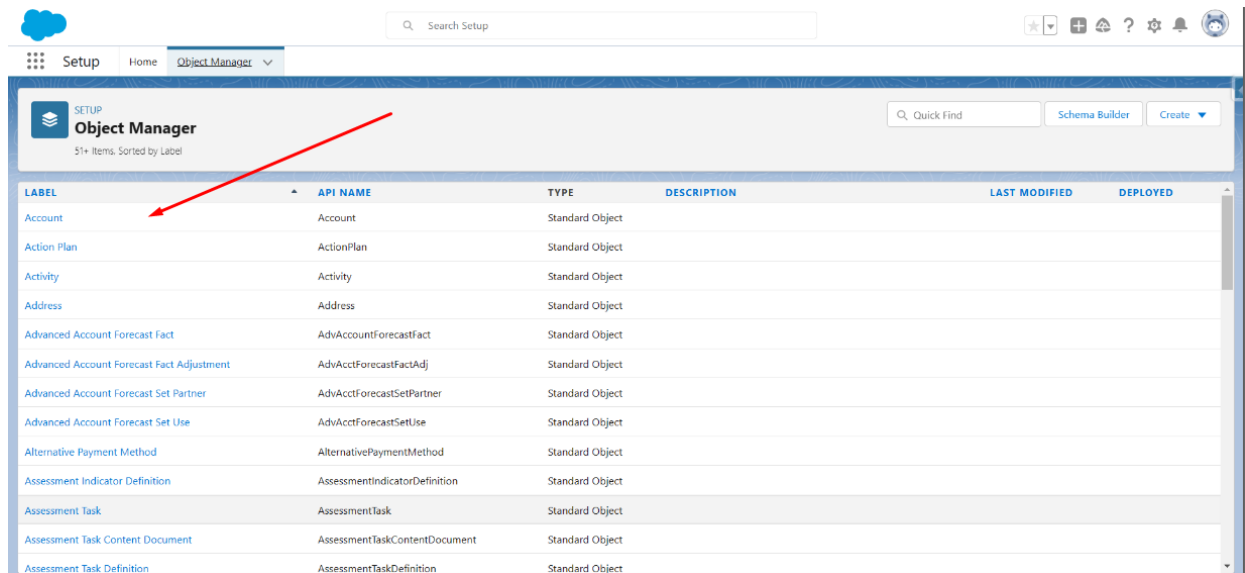
- Click on “Setup”.



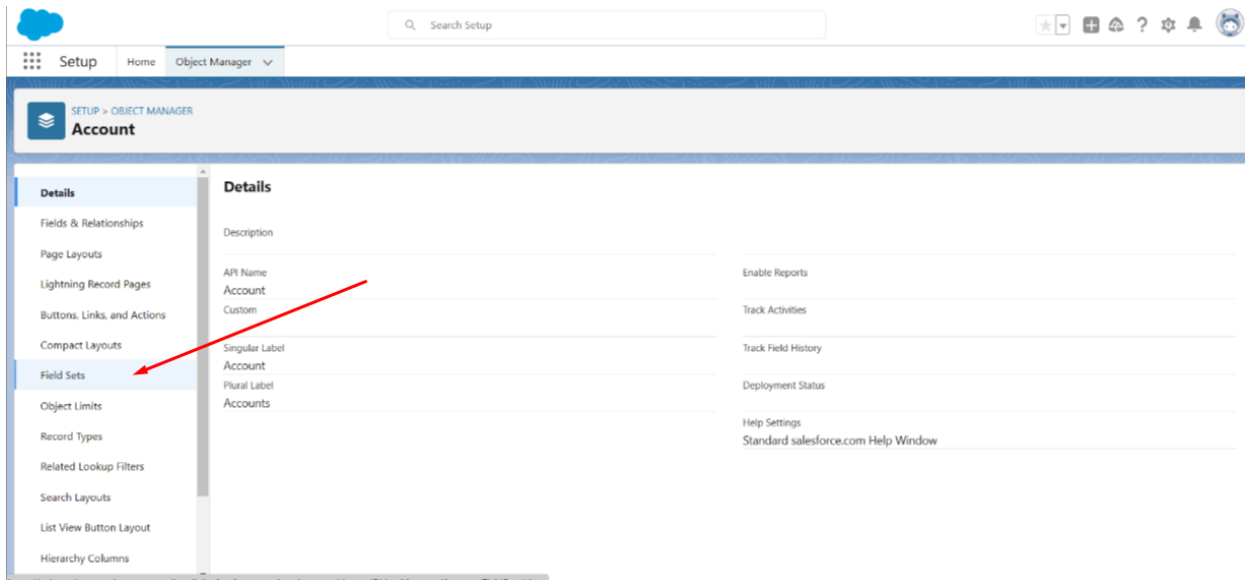
- Click on “Object Manager”.



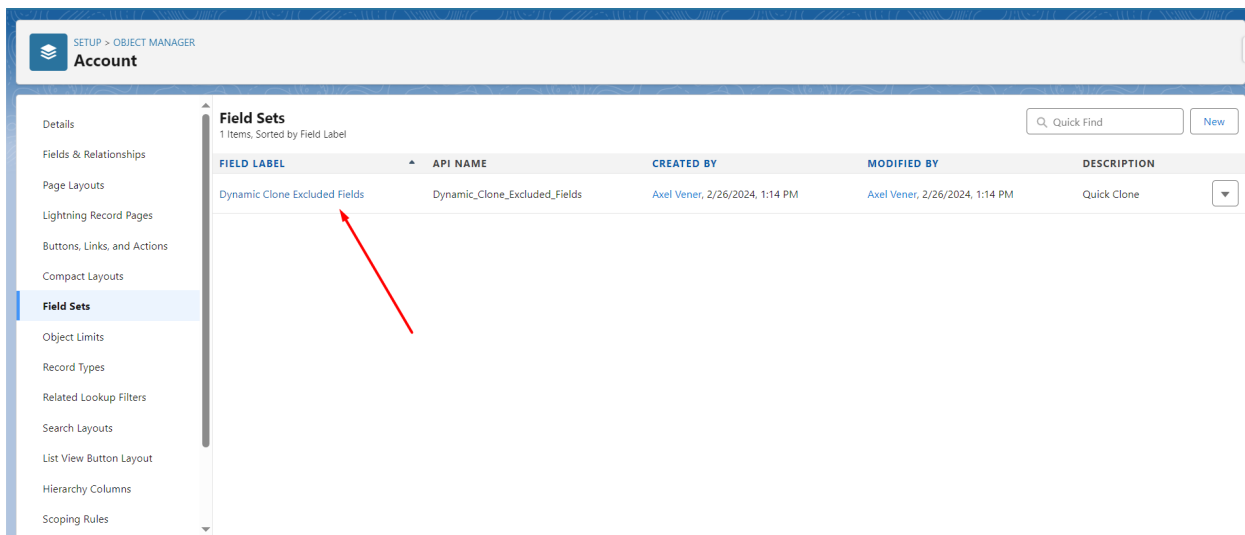
- Click on the object that you are going to work with.



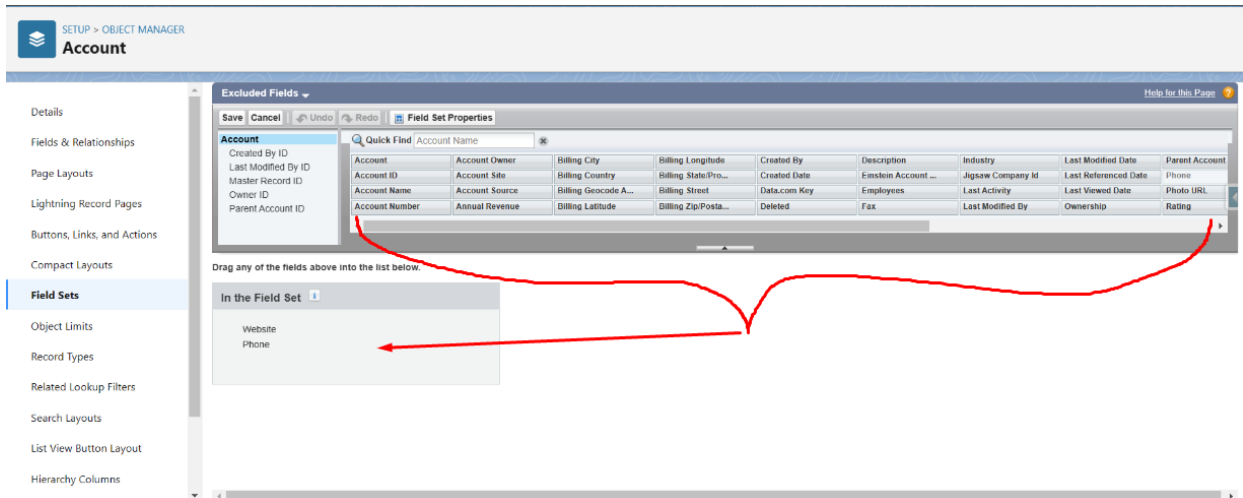
- Click on “Field Sets”.



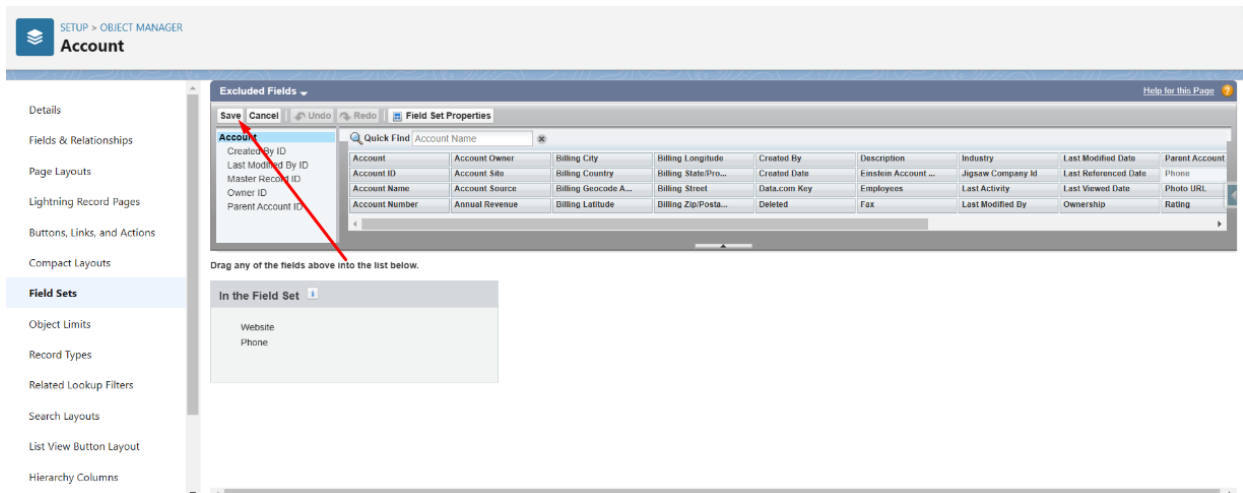
- Click on “Dynamic Clone Excluded Fields” or create it if it’s not already there.



- Drag the fields that you don’t want to be shown in the Dynamic Clone modal to the “In the Field Set” section.



- Click on “Save”



4. Notes

The following objects are not compatible with “Lightning Web Components”, so please use “Lightning Component” as “Action Type” and “quickclone:QuickCloneAura” as “Lightning

Component” when creating the button for them:

Account Actions
New Action

[Help for this Page](#)

Enter Action Information

Save

Cancel

Object Name

Account

Action Type

Lightning Component

Lightning Component

quickclone:QuickCloneAura

Height

250px

Standard Label Type

--None--

Label

Name

Description

Icon

 Change Icon

Save

Cancel

- Action Plan
- Alternative Payment Method
- Business Brand
- Campaign
- Card Payment Method
- Contact Point Type Consent
- Customer
- Data Use Legal Basis
- Digital Wallet
- Location
- Payment
- Payment Authorization
- Process Exception
- Product
- Product Transfer
- Refund
- Social Post
- Task
- Visit
- Work Order
- Work Step Template

5. Installed Components:

1. CloneObjectController

- CloneObjectController.cls
- CloneObjectController.cls-meta.xml

2. CloneObjectControllerTest

- CloneObjectControllerTest.cls
- CloneObjectControllerTest.cls-meta.xml

3. DynamicCloneAura

- DynamicCloneAura.auradoc
- DynamicCloneAura.cmp
- DynamicCloneAura.cmp-meta.xml
- DynamicCloneAura.css
- DynamicCloneAura.design
- DynamicCloneAura.svg
- DynamicCloneAuraController.js
- DynamicCloneAuraHelper.js
- DynamicCloneAuraRenderer.js

4. dynamicClone

- dynamicClone.css
- dynamicClone.html
- dynamicClone.js
- dynamicClone.js-meta.xml