



Universal Cloner

Clone up to five levels records with



Files



Attachments



Notes



USER GUIDE

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Overview

Universal Cloner is a cloning solution available on AppExchange to clone related records up to 5 level hierarchy. The app can be used in four major ways which includes:

1. **Automated** Cloning - Using Process Builder/Apex class
2. **One-Click** Cloning - Using Record Detail Button
3. **Universal** Cloning - Using Universal Cloner Tab needs valid Salesforce recordId
4. **Prepopulated** New Records with admin defined **Default Values**.

This user guide will cover the basic configuration for Universal Cloner.

The application can be downloaded from the AppExchange at:

<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N4V00000FN7xbUAD>

Technical Specifications

Salesforce.com supported versions:

- Enterprise Edition,
- Professional Edition,
- Unlimited Edition,
- Developer Edition.

Versions

The app comes in two versions LIMITED and PRO

- 1) Administrators will be able to use the LIMITED version for free after installing from appexchange.
- 2) Administrators need to contact Appohm Technologies on support@appohm.com for enabling PRO version.

FEATURES	LIMITED VERSION FREE	UNLIMITED VERSION PRO
Clone Source Record	Upto 5 levels limited to 5 records/configurations	Upto 5 levels no limits on records
Subjects Limit	5	No Limit
Configuration Limit	10	No Limit
Records Limit	500	No Limit
Clone Records with 1-Click	✓	✓
Review Records	✗	✓
User Clone	✗	✓
New Record with default values	✗	Create unlimited records with default values
Copy Attachments	✗	Admin can control copying attachments with records
Copy Notes	✗	Admin can control copying notes with records
Copy Files	✗	Admin can control copying files with records

Features

1. Clone up to 5 levels of records on button click. (Parent and Child)
2. Clone records by utilizing invocable class from process builder based on the conditions.
3. Edit Parent and Child objects on the configuration page.
4. Configure cloner config and field values to be set in new cloned records.
5. Set default owner for the hierarchy of cloned records.
6. Allow users to review/edit the field values before cloning.
7. Copy data from one object record to another object record.
8. Include files, attachments and notes in the target object records.
9. Pro version - Create New Records with preset values
10. Pro version - Copy Conditional Child Records
11. Pro version - Mass Cloning: Clone multiple records from the list view

Installation

Step 1

Administrators can install Universal Cloner by visiting the Universal Cloner AppExchange listing: <https://appexchange.salesforce.com/appxListingDetail?listingId=a0N4V00000FN7xbUAD> and click the Get It Now button.

- 1) Follow the install prompts and log in to your Salesforce account.
- 2) After confirming your Salesforce account, you will be given the option to install the application in a Sandbox or Production environment.
- 3) Select the environment where you would like to install the Universal Cloner application.

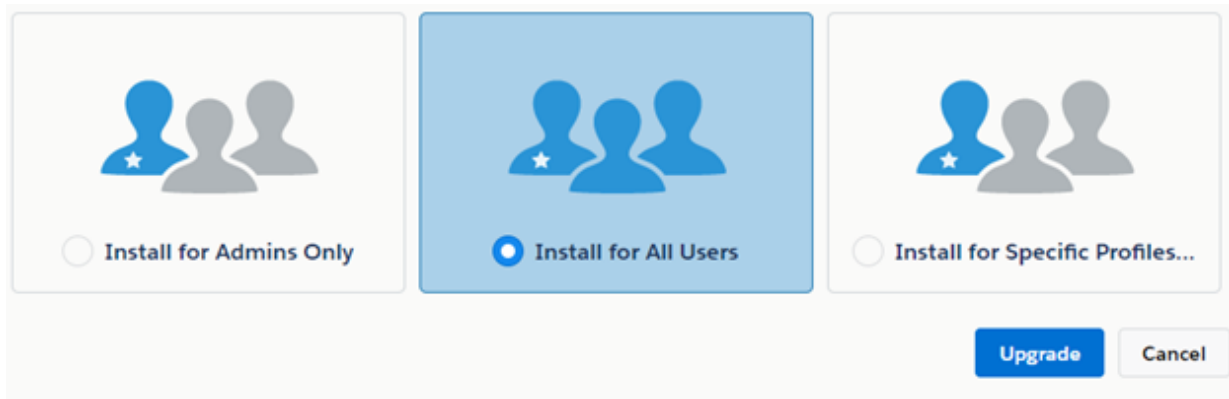
The screenshot shows a dialog box titled "Where do you want to install this package?". Below the title, a message states: "Before you install in a production org, we suggest testing in a sandbox." There are two main options presented in light blue boxes. The first option is "Install in a Production Environment" with the subtext "Install where you or your users work, including developer orgs." and a blue button labeled "Install in Production". The second option is "Install in a Sandbox" with the subtext "Test in a copy of a production org." and a blue button labeled "Install in Sandbox". At the bottom right of the dialog, there is a "Cancel" button.

After confirming the install location, you will also be asked to agree to the Universal Cloner Terms and Conditions as well as the Salesforce.com AppExchange Terms and Conditions.

Once you have agreed to the Terms and Conditions, you will be asked to confirm the installation.

Step 2

After confirming the installation and entering your org credentials, select the visibility of the application for users. Kindly select **“Install for All Users”**.



In the final step, click the Install/Upgrade button.

Step 3

It may take a few moments for the installation to complete. During that time your browser will likely remain on the page of the last step of the installation process for a few minutes before moving to the “processing” page.

Once the package installation is complete, you will receive an email from Salesforce.

Configuration Setup

Universal Cloner requires the following steps to set up before you can start cloning of records.

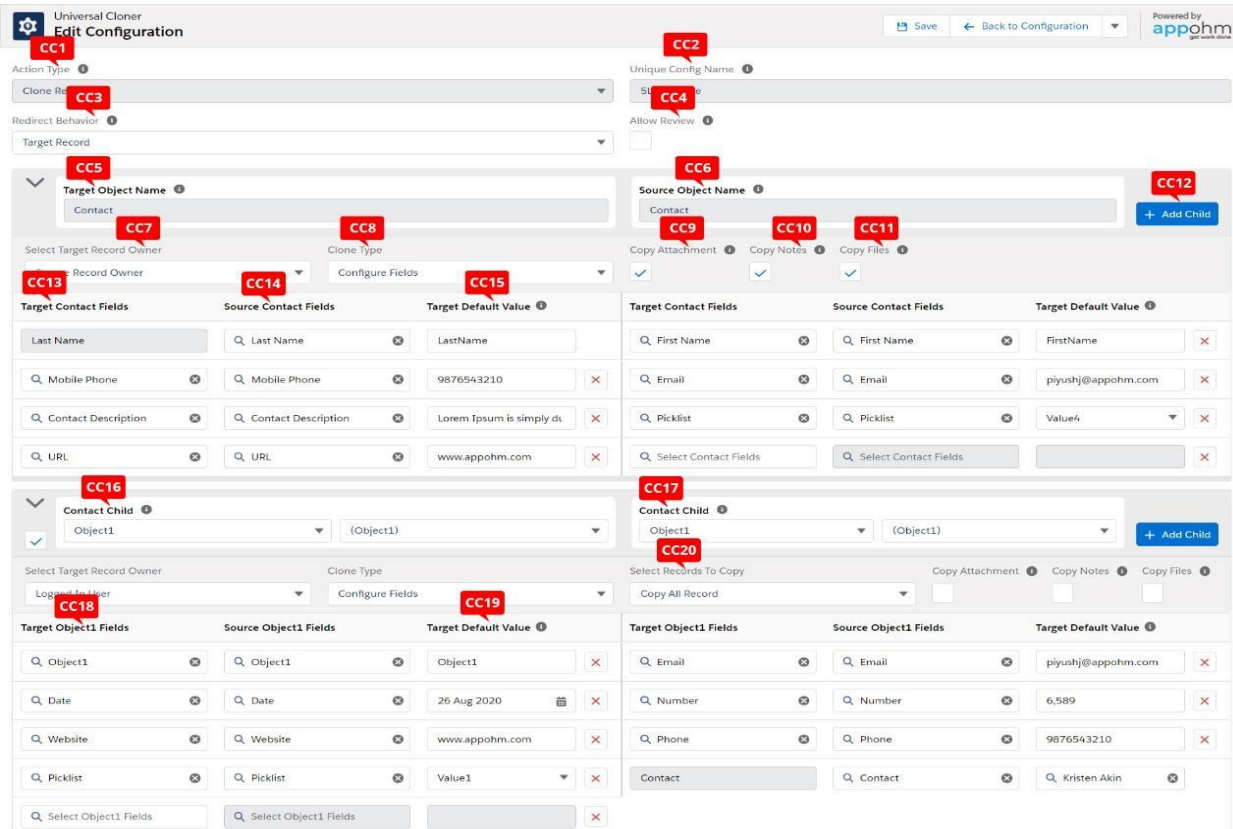
To clone any sObject record with its child records up to 5 levels hierarchy,

- 1) Admin needs to create Cloner Configuration for that sObject.
- 2) Admin can create Multiple Cloner Configurations for a single sObject.
- 3) When a User performs Record cloning of Source sObject record then he/she needs to choose a configuration among the available multiple configurations of that sObject.
- 4) The chosen configuration will decide the field values and child record cloning level in the Cloned record.

Note: **Export** and **Import** functionality saves administrator time to deploy Cloner Configuration from Sandbox to Production (one org to another).

CLONER CONFIGURATION SETTINGS

The Cloner Configuration has 20 settings that play an important role in cloning records. These are explained one by one below:



The screenshot shows the 'Universal Cloner Edit Configuration' interface. It features a top navigation bar with 'Save' and 'Back to Configuration' buttons, and a 'Powered by appohm' logo. The main area is divided into two sections: 'Contact' and 'Object1'. Each section contains a 'Target Object Name' field, a 'Source Object Name' field, and a 'Target Default Value' field. Below these are 'Target Contact Fields' and 'Source Contact Fields' tables. The 'Contact' section also includes a 'Contact Child' dropdown and a 'Contact' field. The 'Object1' section includes an 'Object1' dropdown and an 'Object1' field. The 'Contact' section has a 'Clone Type' dropdown and a 'Clone Type' field. The 'Object1' section has a 'Clone Type' dropdown and a 'Clone Type' field. The 'Contact' section has a 'Copy Attachment' checkbox, 'Copy Notes' checkbox, and 'Copy Files' checkbox. The 'Object1' section has a 'Copy Attachment' checkbox, 'Copy Notes' checkbox, and 'Copy Files' checkbox. The 'Contact' section has a 'Copy Attachment' checkbox, 'Copy Notes' checkbox, and 'Copy Files' checkbox. The 'Object1' section has a 'Copy Attachment' checkbox, 'Copy Notes' checkbox, and 'Copy Files' checkbox.

Cloner Configurations	Description
CC 1	Action Type – Choose the type of Cloner Configuration whether you want to Clone Records or Create Records with Default values.
CC 2	Unique Config Name - Unique Name for Cloner Configuration
CC 3	Redirect Behavior - It controls the redirection of the user after the completion of the cloning process. As soon as the record is cloned, System redirects the user to the page as selected in this field.
CC 4	Allow Review - If this Checkbox is checked then User will be landed to the Review Screen to make finalized changes before cloning.
CC 5	Target Object Name - The record of this object holds the values of source record after cloning.

CC 6	Source Object Name - System will use details of this object to accomplish the cloning process.
CC 7	Select Target Record Owner - Owner of the Cloned record will be based on the option selected in this field.
CC 8	Clone Type - This field allows Admin to clone “All Fields” or “Configure Fields” to clone
CC 9	Copy Attachment - If this checkbox is checked then the attachments of Source record will also be included in the cloned record.
CC 10	Copy Notes - If this checkbox is checked then the notes of Source record will also be included in the cloned record.
CC 11	Copy Files - If this checkbox is checked then the files of Source record will also be included in the cloned record.
CC 12	+Add Child - This Setting allows Admin to define Child Object mapping of Target and Source objects.
CC 13	Target Object Field - This field of Target object will hold the value of the mapped field of Source Object or Default value.
CC 14	Source Object Field - System will use the value of this field to fill the mapped Target Object Field.
CC 15	Target Default Value - If Source mapping field is not defined then System will use the value of this field to fill the mapped Target Object Field.
CC 16	Target Child Object - This field will contain the Child Object Name of the Selected Target Object (CC 5). The record of this object holds the values of the mapped source child object record after cloning.
CC 17	Source Child Object - This field will contain the Child Object Name of the Selected Source Object (CC 6). System will use details of this object to accomplish the cloning process.
CC 18	Target Child Field - This field will contain the Reference fields by which Target Child and Target Parent Object are related.
CC 19	Source Child Field - This field will contain the Reference fields by which Source Child and Source Parent Object are related.

CC 20	Select Records To Copy – Select an option among Newest, Oldest Or All Records for child object records which need to be included in the cloning process.
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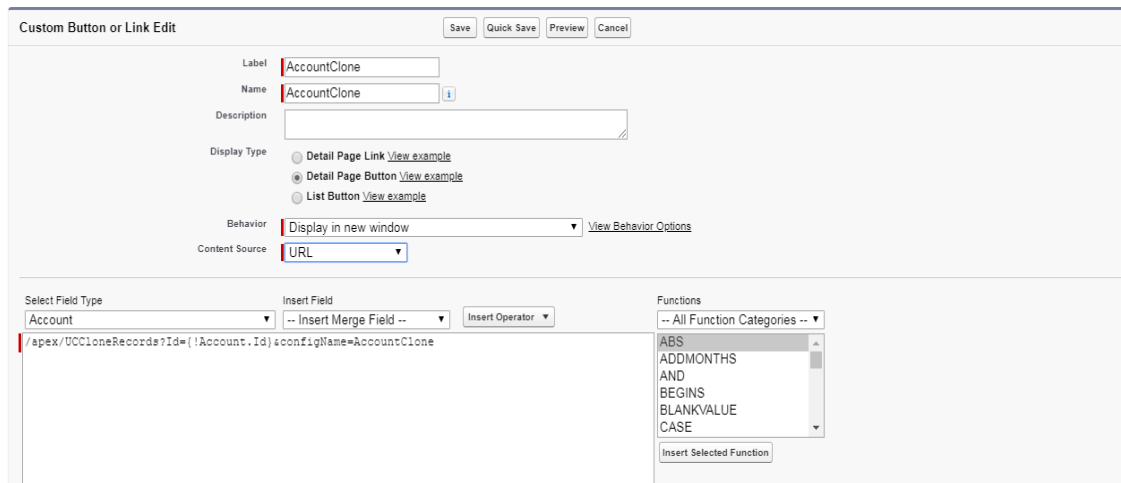
Cloning Process

The app can be used in three ways to clone records which are:

USING RECORD DETAIL PAGE BUTTON

Universal Clone app allows record cloning using Detail Page Button. Kindly follow below steps to configure for any Subject:

1. Create Detail Page Button on the Object (Ex. Account).
 - a. Enter Label and Name of the Button.
 - b. Select Display Type as **Detail Page Button** and Choose Behavior.
 - c. Choose Content Source as **URL**
 - d. Enter value as
`/apex/UCCloneRecords?Id={!Account.Id}&configName=AccountClone`
 (where **AccountClone** is Unique Config Name of Cloner Configuration)



Custom Button or Link Edit

Save Quick Save Preview Cancel

Label: AccountClone

Name: AccountClone

Description:

Display Type:

☐ Detail Page Link [View example](#)

☒ Detail Page Button [View example](#)

☐ List Button [View example](#)

Behavior: Display in new window [View Behavior Options](#)

Content Source: URL

Select Field Type: Account

Insert Field: -- Insert Merge Field --

Insert Operator: --

Functions:

-- All Function Categories --

ABS

ADDMONTHS

AND

BEGINS

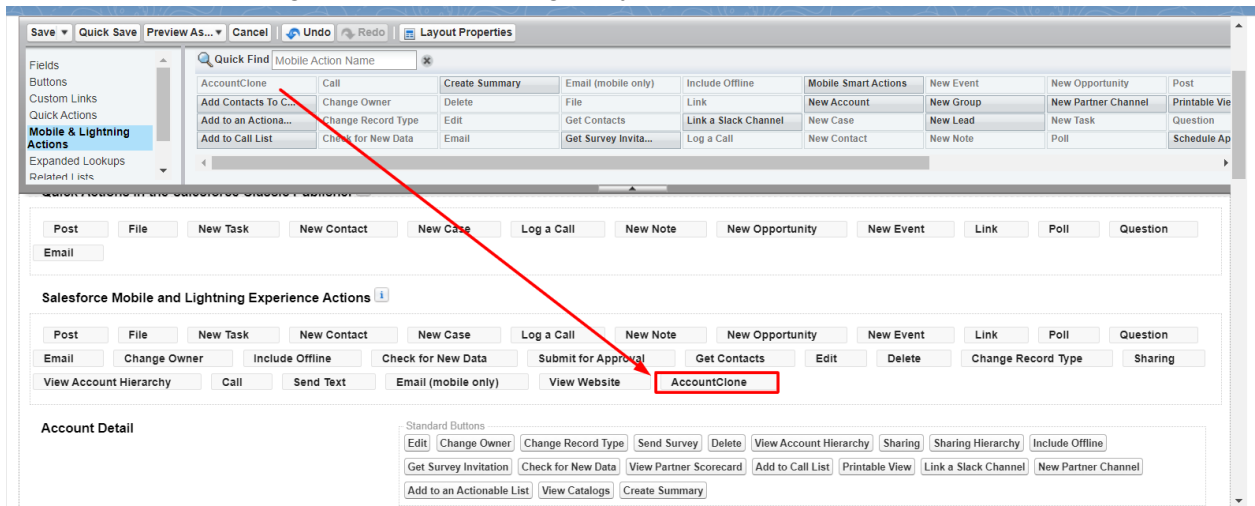
BLANKVALUE

CASE

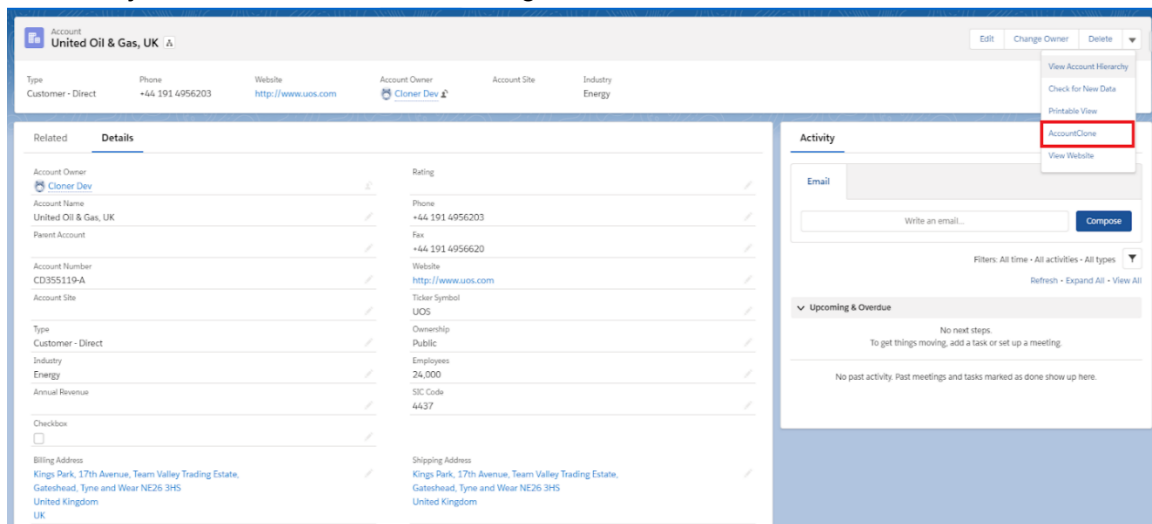
Insert Selected Function

`/apex/UCCloneRecords?Id={!Account.Id}&configName=AccountClone`

- Add created Detail Page Button on the Page Layout.

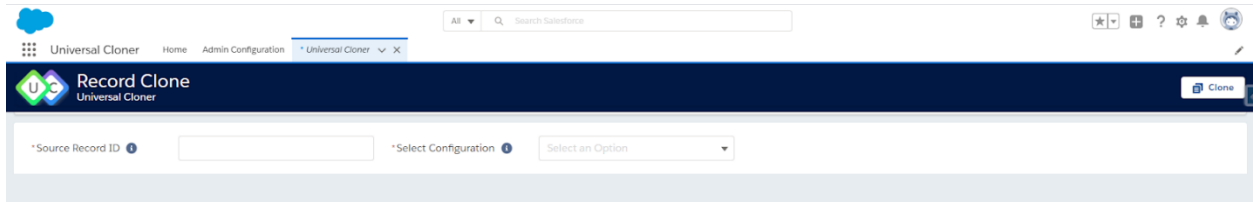


- Go to Object record and Perform cloning on Button Click.



USING UNIVERSAL CLONER TAB

Universal Cloner app consists of a Universal Cloner page where you can perform cloning of a record by providing **Record Id**, selecting **Cloner Configuration** and then clicking **Clone** Button.



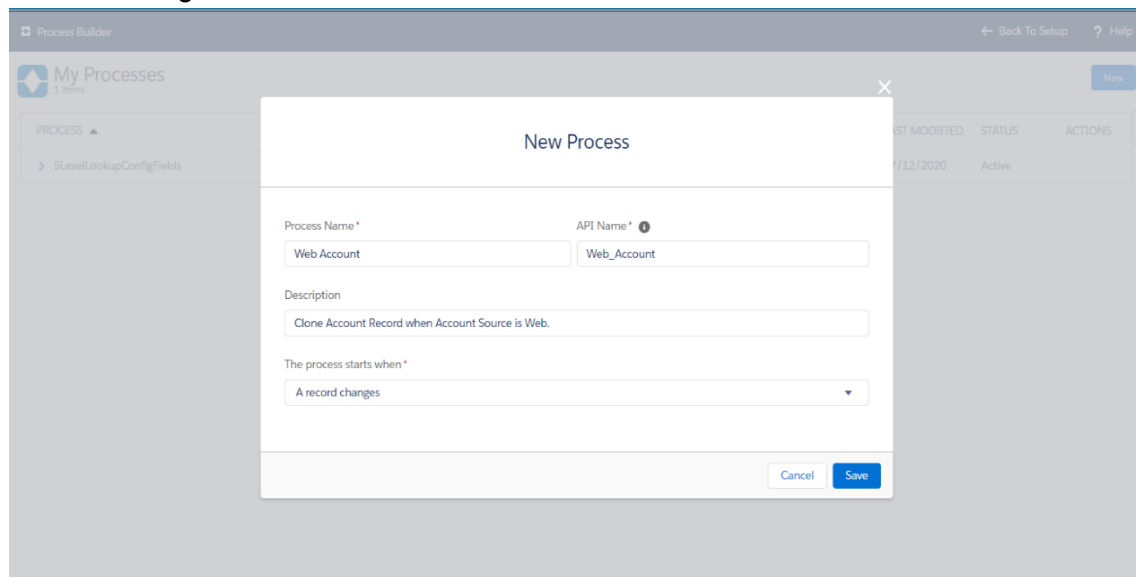
USING API BASED AUTOMATION FOR APEX/PROCESS-BUILDER

Universal Clone app exposes global API which can be used within Apex class or process builder to control the cloning action based on conditions. API needs two items within list

- 1) Unique configuration name – First item in list should be name of configuration that will be used for the cloning process.
- 2) Source RecordId – Second item in list should be the source recordId for which cloning process should take place.

A step by step example to setup auto cloning using Process Builder for Account is shown below:

- Go to Setup.
- Search and Select “Process Builder” in Quick Find Box.
- Click on “New” to create a process.
- Give your process a good descriptive name and choose “The process starts when” as “A Record Changes” and Save.



- Select Object and define Criteria for process to fire.
- Select Action Type as “Apex”.

- Give your Action a good descriptive name and select “Apex Class” as “Universal Cloner API for one record to clone and create records”
- Define RecordId and ConfigName and Save.

The screenshot displays the Appohm Process Builder interface for a process named "Web Account". The workflow starts with a "START" node, followed by an "Account" object. A decision diamond labeled "Web Accounts" has two paths: a "TRUE" path leading to "IMMEDIATE ACTIONS" and a "FALSE" path leading to another decision diamond labeled "+ Add Criteria". The "IMMEDIATE ACTIONS" block contains a "+ Add Action" button and a "STOP" node. The "+ Add Criteria" block also has a "+ Add Action" button and a "STOP" node.

On the right, the "Select and Define Action" panel is open. It shows the following configuration:

- Action Type ***: Apex
- Action Name ***: UCClone
- Apex Class ***: Universal Cloner API for one re

Below the action configuration, the "Set Apex Variables" section contains a table with the following data:

Field *	Type *	Value *
recordId	Field Reference	[Account].Id
configName	String	Account_Clone

At the bottom of the panel are "Save" and "Cancel" buttons.

- Activate the Process.
- Now whenever a record satisfies the Criteria defined in process then UC Cloner will clone the record as per the defined Configuration.