

ASTREA CLONE

INSTALLATION GUIDE

Astrea Clone is available as a Paid app in AppExchange. This guide will walk you through installing Astrea Clone into your Salesforce Org.

Click on the “Get IT Now” on the product listing of AppExchange.

The screenshot shows the AppExchange product listing for 'Astrea Clone'. At the top, there's a header with the app icon, name, and a brief description: 'Clone records with Related list in button click only'. A callout box says 'Click on Get It Now to start the Installation'. Below the header, there are tabs for 'Overview', 'Details', 'Reviews' (3), and 'Provider'. The 'Overview' tab is selected. The main content area includes a description of the app by Astrea IT Services Pvt Ltd, a 'RELEASED' date of 8/1/2012, and a 'PRICING' section showing '\$300.00 USD per company per year' with a note 'Discounted for Nonprofits'. There are also buttons for 'Watch a Demo' and 'Take a Test Drive'. On the right, there's a 'Get It Now' button. Below the pricing, there's a 'CATEGORIES' section listing 'Admin & Developer Tools'. A preview image of the app interface is shown on the right, featuring a 'Want to clone records' thought bubble and a 'Use Astrea Clone and get solution in one click' thought bubble. The preview also shows an 'Account Detail' table with fields like Account Owner, Account Name, Account Number, Account Type, Industry, Annual Revenue, and Contact Information.

Install the application either in Sandbox or directly to the Production.

This screenshot shows the same AppExchange product listing for 'Astrea Clone', but with the 'Reviews' tab selected. The main content area now displays the question 'How would you like to continue?' with two installation options: 'Install in production' (Includes active, trial or developer orgs) and 'Install in sandbox' (Test in a copy of your production org). The 'Get It Now' button is still visible on the right. At the bottom, there's a footer with links: 'Find a Consulting Partner', 'Find a Developer', 'List on the AppExchange', and 'Learn About the AppExchange', along with social media icons for Facebook, Twitter, and RSS.

Enter your credentials.

User Name
marketing@astreait.com

Password
••••••••

☐ Remember User Name

Login

Forgot your password?

Don't have an account? [Sign up for free.](#)



3 WAYS TO GROW SALES

Win with social, mobile, and cloud technologies.

Watch video

How Rossignol keeps customers close

Watch video >

Ebook: 7 Practical Sales Tips

Download now >

Try Salesforce CRM free for 30 days

Sign up >

Click on 'Continue' to proceed with the installation.

Package Installation Details

Help for this Page ?

Package Name

AstreaClone

Version Name

Spring 2012

Version Number

1.0

Publisher

Astreait

Description

Click Continue to proceed the installation

Continue

Cancel

Package Components

▼ Fields (3)

Action	Component Name	Parent Object	Component Type	Installation Notes
Create	Field Name	Astrea_Clone_Rule_Fields__c	Custom Field	This is a brand new component.
Create	Field Value	Astrea_Clone_Rule_Fields__c	Custom Field	This is a brand new component.
Create	Astrea Clone Rule	Astrea_Clone_Rule_Fields__c	Custom Field	This is a brand new component.

▼ Objects (2)

Action	Component Name	Parent Object	Component Type	Installation Notes
Create	Astrea Clone Rule Fields		Custom Object	This is a brand new component.
Create	Astrea Clone Rule		Custom Object	This is a brand new component.

Follow Step 1 to 3.

Force.com Home

System Overview **New!**

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration
- My Chatter Settings

App Setup

- Customize
- Create
- Develop
- Deploy
- Schema Builder
- Installed Packages
- AppExchange Marketplace
- Critical Updates

Administration Setup

- Manage Users

Step 1. Approve Package API Access

Step 1 of 3

These settings control the access that s-controls and other components in this package have to standard objects via the API. The access will still be constrained by the user's profile. You can view and edit the package API access to standard objects after the package is installed from the package detail page. [Tell me more](#)

Package Custom Objects

This Package will have the user's access (via the API) to all Custom Objects in your Organization.

Extended Object Permissions

	Read	Create	Edit	Delete		Read	Create	Edit	Delete
Accounts	✓	✓	✓	✓	Ideas	✓	✓	✓	✓
Assets	✓	✓	✓	✓	Leads	✓	✓	✓	✓
Campaigns	✓	✓	✓	✓	Opportunities	✓	✓	✓	✓
Cases	✓	✓	✓	✓	Price Books	✓	✓	✓	✓
Contacts	✓	✓	✓	✓	Products	✓	✓	✓	✓
Contracts	✓	✓	✓	✓	Push Topics	✓	✓	✓	✓
Documents	✓	✓	✓	✓	Solutions	✓	✓	✓	✓

General User Permissions

This Package will be able to use all of the General User Permissions from the user's Profile.

Select the security level and click next.

Package Installer

AstreaClone

Help for this Page

Step 2. Choose security level

Step 2 of 3

Select security settings:

☒ Grant access to admins only

Users with your profile get full access (best for limited deployments)

☐ Grant access to all users

All internal custom profiles get full access

☐ Select security settings

User access set by profile (recommended for most packages)

Previous

Next

Cancel

Click On the 'Install' Button.

Package Installer

AstreaClone

Help for this Page

Step 3. Install Package

Step 3 of 3

The package is ready to be installed. Click Install to continue.

Previous

Install

Cancel

A Notification will be shown when installation is completed.

Package Details

AstreaClone (Managed)

Help for this Page

 **Install Complete**

Follow any remaining steps in the app install guide to complete deployment.

Installed Package Detail

Uninstall

View Components

View Dependencies

Package Name	AstreaClone	Version Number	1.0
Language	English	First Installed Version Number	1.0
Version Name	Spring 2012	Package Type	Managed
Namespace Prefix	Ast	API Access	Unrestricted [Enable Restrictions]
Publisher	Astreatit	Modified By	Varun Rajpoot , 7/20/2012 2:53 PM
Description			
Installed By	Varun Rajpoot , 7/20/2012 2:53 PM		

The steps so far are similar to installation steps of any app from AppExchange. The next steps are specific to Astrea Clone.

How to create and add Astrea Clone button

- A. CREATE A BUTTON FOR AN OBJECT
- B. ADD THE BUTTON IN THE LAYOUT

For Account and Contacts: We need to add a button to page layout of standard objects in which cloning functionality is required. Drag and Drop the 'Astrea Clone' Button on the layout of the standard object in which you want to use this functionality. This is currently supported for two standard objects – Account and Contact.

HOW TO CREATE ASTREA CLONE BUTTON:

- Go to Setup → Customize → Create → Object → Select the required object in which you want to create a button.
- Go to section Custom Button and click on 'New'.
- Give the Label and Name for a button.
- For Display type select 'Detail Page Button'
- Choose 'Display in existing window with sidebar' for Behaviour
- For Content Source select 'URL'
- Then provide the Formula for the button

`/apex/Ast__astreaObjectCloneVf?id={!ObjectAPIName.Id}`

- Click Save.

In place of 'ObjectAPIName' write API name of the object for which you want to make a button. Please note that the api names for custom object are prefixed with __c. So if name of custom object is testObj__c, your URL may appear as

`/apex/Ast__astreaObjectCloneVf?id={!testObj__c.Id}` for custom objects or

`/apex/Ast__astreaObjectCloneVf?id={!Opportunity.Id}` for standard objects.

Policy Custom Button or Link
New Button or Link

Custom Button or Link Edit

Save Quick Save Preview Cancel

Label: Astrea Clone

Name: Astrea_Clone

Namespace Prefix: Ast

Description:

Display Type: ☐ Detail Page Link [View example](#) ☒ Detail Page Button [View example](#) ☐ List Button [View example](#)

Behavior: Display in existing window with sidebar [View Behavior Options](#)

Content Source: URL

Quick Tips:

- [Getting Started](#)
- [Sample Buttons & Links](#)
- [Operators & Functions](#)

Select Field Type: Policy

Insert Field: -- Insert Merge Field --

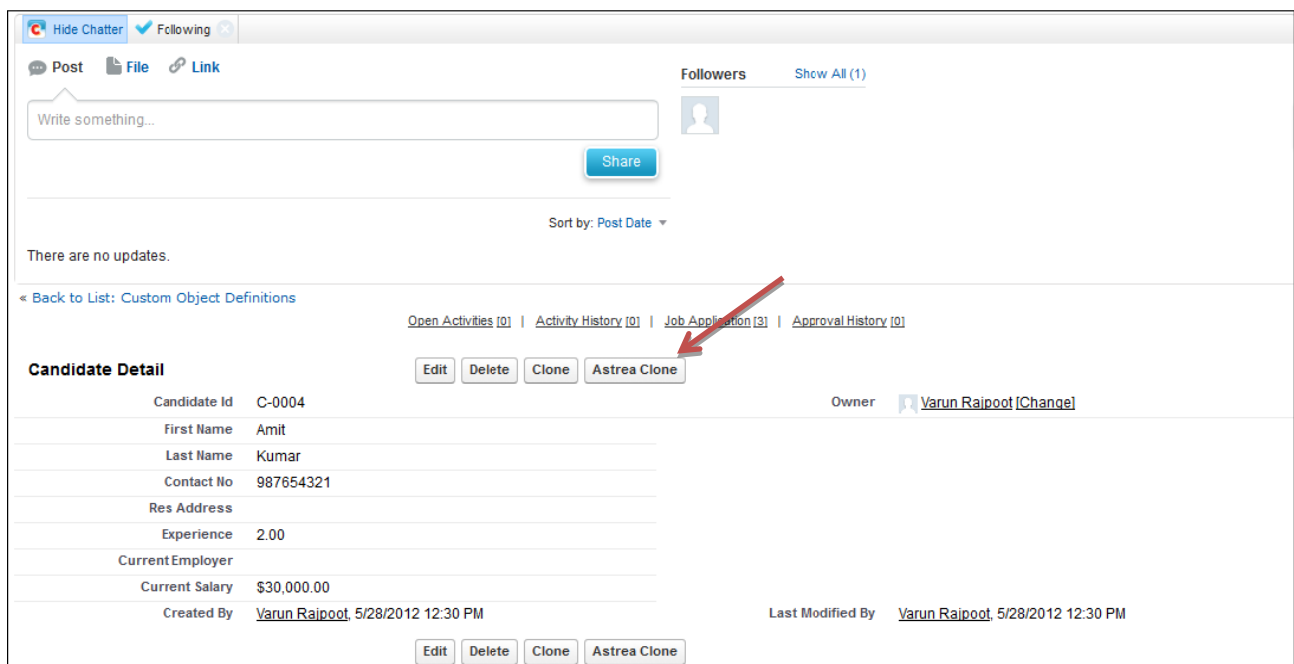
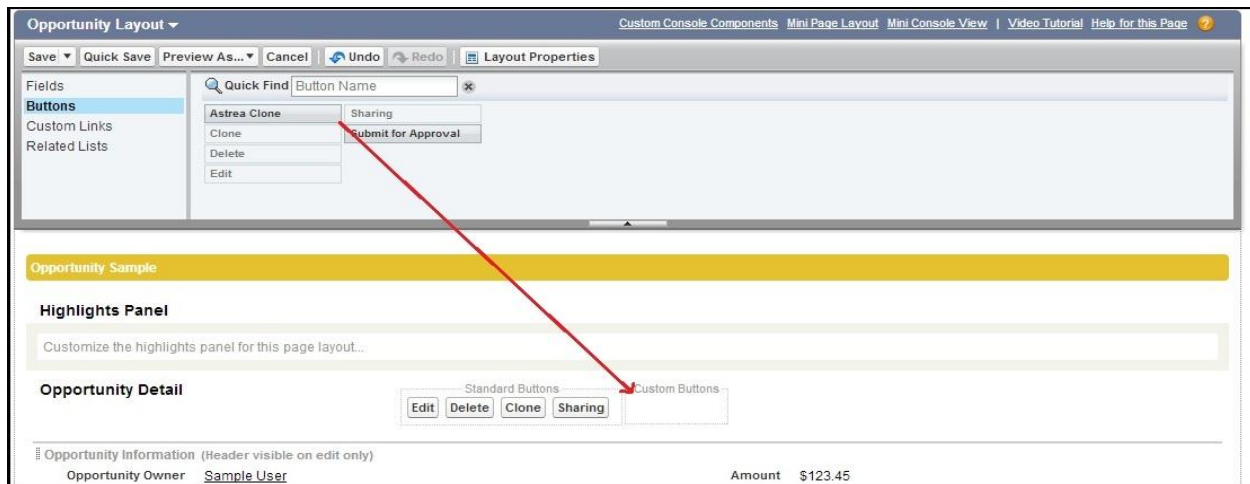
Insert Operator:

Functions: -- All Function Categories --

ABS
AND
BEGINS
BLANKVALUE
CASE
CASESAFEID

HOW TO ADD BUTTON IN PAGE LAYOUT

- Go to Setup → Customize → Create → Object → Select the required object in which you want to create a button.
- Select the Page Layout in which you want to Add Astrea Clone button.
- Add the button in Page Layout and click save.



How to use Bulk Clone functionality for Astrea Clone:

Bulk clone functionality is working for only four standard objects i.e Account, Contact, Opportunity and Case. User can use this functionality from the list view of the object. In the package, Bulk Clone button for Account and Contact are already present. But for Opportunity and Case user have to create a Bulk clone button.

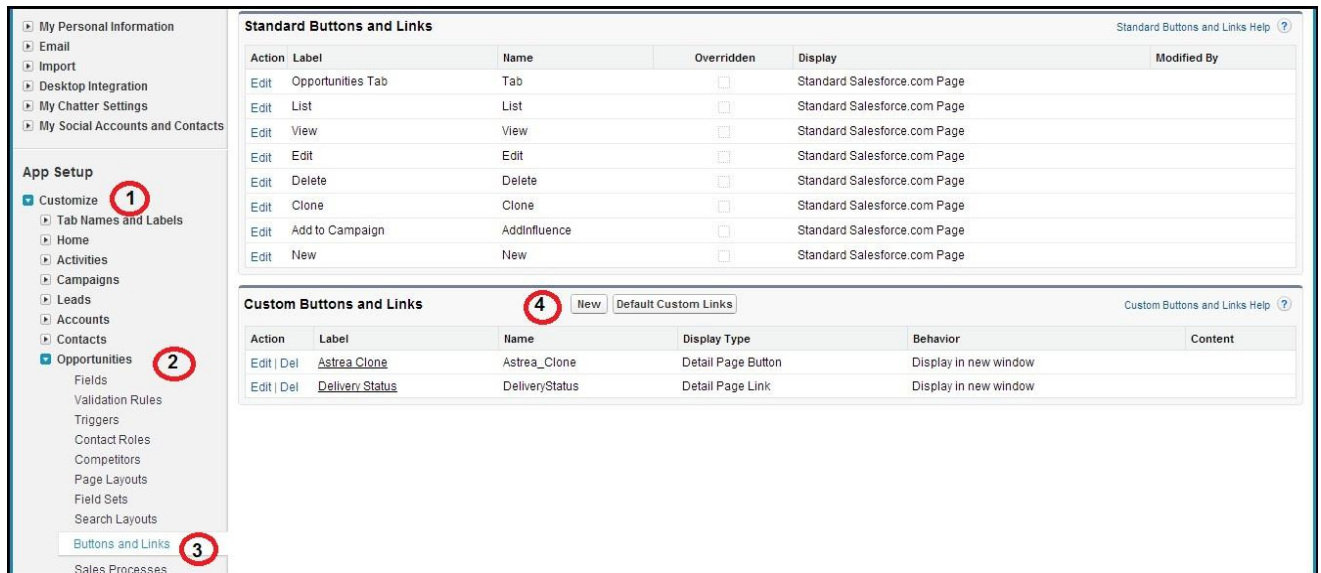
- Create a button 'Bulk Clone' for Opportunity and Case object if required.
- Add 'Bulk Clone' button in the List View of the object(Account, Contact, Opportunity and Case)

A. HOW TO CREATE A 'BULK CLONE' BUTTON.

Go to Setup → Customize → Opportunities or Cases → Button and Links.



Go to Setup



Follow the steps

- Give the Label and name for the Button
- Select List Button for Display type
- Select Visualforce Page as picklist value for Content Source.
- Select Visualforce Page in the content section.

Available Visualforce page for:

Opportunity: `astreaObjectsCloneOpportunityVf[Ast_astreaObjectsCloneOpportunityVf]`

Case: `astreaObjectsCloneCaseVf[Ast_astreaObjectsCloneCaseVf]`

Opportunity Custom Button or Link Help for this Page

New Button or Link

Custom Button or Link Edit

Save Quick Save Preview Cancel

Label Bulk Clone

Name Bulk_Clone ⓘ

Namespace Prefix Ast

Description

Display Type

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

☒ Display Checkboxes (for Multi-Record Selection)

Behavior Display in existing window without sidebar View Behavior Options

Content Source Visualforce Page

Content astreaObjectsCloneOpportunityVf [Ast__astreaObjectsCloneOpportunityVf]

Save Quick Save Preview Cancel

Quick Tips

- Getting Started
- Sample Buttons & Links
- Operators & Functions

B. HOW TO ADD BULK CLONE BUTTON ON LIST VIEW

- Go to Setup → Customize → Select Object → Search Layouts → Click on the Edit link on the list view of the object.

Action	Layout	Columns Displayed
Edit	Search Results	Opportunity Name, Account Name, Account Site, Stage, Close Date, Opportunity Owner Alias
Edit	Lookup Dialogs	Opportunity Name, Account Name, Account Site
Edit	Lookup Phone Dialogs	Opportunity Name, Account Name, Account Site
Edit	Opportunities Tab	Opportunity Name, Account Name, Close Date
Edit	Opportunities List View	N/A
Edit	Search Filter Fields	

- Select Bulk Clone in available button list and Click on Add.
- Click Save.

Standard Buttons

☒ New [NewCase]

☒ Accept [Accept]

☒ Close [MassClose]

☒ Change Owner [ChangeOwner]

☒ Change Status [ChangeStatus]

Custom Buttons

Available Buttons

Bulk Clone

Add

Remove

Selected Buttons

--None--

Up

Down

Save

Cancel

Now, You are able to use this App.