

Astrea Clone

DESCRIPTION:-

Astrea clone is an App. which helps organisation in setting up a complete feature to clone the records. Astrea Clone allows to clone records of any objects either it is accustom object or standard object. Astrea clone allows cloning of records upto two object level means it has a capability of cloning the related list also. In short, Astrea Clone minimizes the effort in cloning the records.

Requirement for cloning the records:

For Cloning a records users are required to add a 'Astrea Clone' button the layout of object. Currently, Astrea Clone product contains clone button for 2 standard objects: Account and Contact. Bulk Clone buttonns are available for Account, Contact and Case.

Users are required to create a clone button for any other object for which they want to support Cloning functionality.

Features of Astrea Clone:

- 1. Define the number of clone records required.*
- 2. Bulk cloning of records. This feature is only available for Account, Contact and Case.*
- 3. Supports cloning of Notes and Attachments of the records.*
- 4. Users can select the related list which they want to be cloned along with the parent record. Through this feature the product supports deep cloning. Only Related list which have data are shown.*
- 5. Admin can define default rules for any Object which will be enforced across an organization. These rules specify field values.*
- 6. Users can override the rules created by Admin when performing clones.*

New Features:

- 1. Define the name of the clone record the way you want. Means if required, user can define any other name for the cloned records or the same name of the record for which records are cloned.*
- 2. Cloning the object records having unique and required field.*

How Astrea Clone works:

1. Click on the button created for cloning the records. This will redirect you to the info page used for cloning the records.

Account Detail Edit Delete Include Offline Astrea Clone

Account Owner	Astrea Clone [Change]		
Account Name	United Oil & Gas, Singapore [View Hierarchy]		
Parent Account			
Account Number	CD355120-B	Website	http://www.uos.com
Account Site		Ticker Symbol	UOS
Type	Customer - Direct	Ownership	Public
Industry	Energy	Employees	3,000
Annual Revenue		SIC Code	4437
Billing Address	9 Tagore Lane Singapore, Singapore 787472 Singapore, Singapore		Shipping Address 9 Tagore Lane Singapore, Singapore 787472 Singapore
Customer Priority	High	SLA	Platinum
SLA Expiration Date	1/30/2012	SLA Serial Number	2457
Number of Locations	6	Upsell Opportunity	Maybe
Active	Yes		
Created By	Astrea Clone , 7/4/2012 12:32 AM		Last Modified By Astrea Clone , 7/4/2012 12:32 AM
Description			
Custom Links	Billing		

Edit Delete Include Offline Astrea Clone

Click on the Astrea Clone button for cloning the record and its related list

2. Provide Information as per requirement for cloning a record. Use the Set Records Name link to optionally specify names of newly created records or make the 'set the name as original Name' checkbox true to keep the same name as the original name. Use the Add and Delete button to create rules. Administrators have access to the Save Rule button that allows them to save rules for all users.

Also select the related list required to be cloned with the original record.

How many times do you want to clone this object? ?

Number of records to be created Set Records Name ?

Keep the names of records and their child records same as original ☐

Override existing field values ?

Select Fields	Value
None	
Employees	32,500
Billing Country	Siwan
Account Description	This is test Account.
Shipping City	

Save Rule Clone Add

Select child objects to clone ?

☐ Contact (19) ☐ Opportunity (2)

Specify default value for the fields of cloned record.

Click on Add link to add the new rule

Click on Save Rule button to save the rule

Make the checkbox true for the related records which needs to be cloned.

3. You will get the names of the cloned records.

List of newly created Account records: 🟡

- Account 1 : Aethna Home Products
- Account 2 : Aethna Home Products
- Account 3 : Aethna Home Products
- Account 4 : Aethna Home Products
- Account 5 : Aethna Home Products

List of cloned records. Click on the name of the record to see the detail information of the record.

Close

How BULK CLONE Works:

1. Select all the records that need to be cloned from the list view of a supported object.

A B C D E F G H I J K L M N O P Q R S						
New Account Bulk Clone 🔄						
☐	Action	Account Name ↑	Account Site	Billing State/Province	Phone	Type
☒	Edit Del +	<u>Burlington Textiles Cor...</u>			(36) 222-7000	Customer - Direct
☒	Edit Del +	<u>Dickenson plc</u>			6200	Customer - Channel
☒	Edit Del +	<u>Edge Communications</u>			000	Customer - Direct
☒	Edit Del +	<u>Express Logistics and...</u>			421-7800	Customer - Channel
☒	Edit Del +	<u>GenePoint</u>			(650) 867-3450	Customer - Channel
☐	Edit Del +	<u>Grand Hotels & Resort...</u>		IL	(312) 596-1000	Customer - Direct
☐	Edit Del +	<u>Pyramid Construction Inc.</u>			(014) 427-4427	Customer - Channel
☒	Edit Del +	<u>sForce</u>		CA	(415) 901-7000	
☒	Edit Del +	<u>test opportunity 1 1</u>				
☐	Edit Del +	<u>United Oil & Gas Corp.</u>		NY	(212) 842-5500	Customer - Direct

2. Provide Information as per requirement for cloning a record.

7 Account records are selected for Cloning.

How many times do you want to clone this object? Keep the name of records same as original ☒

Define all value required for bulk cloning the records.

Override existing field values

Select Fields	Value	Add
None		
Del Active	Yes	
Del Account Number	1234	
Del Industry	Electronics	
Del Employees	32,500	
Del Billing Country	Siwan	
Del Account Description	This is test Account.	
Del Shipping City		

Save Rule

Select child objects to clone

Select All Deselect All

☐ Case (10)
☐ Contact (8)
☐ Opportunity (15)

Select the related list which also needs to be cloned with the parent records. You can also check the total number of child records.

3. After cloning the records you can see the record name of the cloned records.

List of newly created Account records:

- Account 1 : [GenePoint](#)
- Account 2 : [Edge Communications](#)
- Account 3 : [Dickenson plc](#)
- Account 4 : [Express Logistics and Transport](#)
- Account 5 : [sForce](#)
- Account 6 : [Burlington Textiles Corp of America 2](#)
- Account 7 : [test opportunity 1 1](#)
- Account 8 : [GenePoint](#)
- Account 9 : [Edge Communications](#)
- Account 10 : [Dickenson plc](#)
- Account 11 : [Express Logistics and Transport](#)
- Account 12 : [sForce](#)
- Account 13 : [Burlington Textiles Corp of America 2](#)
- Account 14 : [test opportunity 1 1](#)

Users can click on the record name to check the detail page of the cloned records.

Limitations:-

Due to Salesforce Governance limit, Astrea Clone has a few limitations. These are explained below:

1. The total number of newly created records including the top level records and the records in the related lists in one clone operation should be less than 10,000.
2. User can clone maximum up to 100 parent records at a time for any object
3. Cloning the attachment of size greater than 135 kb can throw the Salesforce view state limitation issue.

4. *If a field having condition 'Unique and Required' is present in the object, then users are allowed to create only one cloned record at a time as well as it is required to mention some different value for these fields. If Account and Contact object will contain such field then Bulk clone functionality will not work for them.*