

Permission Cloner

Installation Guide

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Overview

Permission cloner is an admin tool which helps in cloning field and object level permissions from one field/object to another field/object.

Install application in your org

1. Go to app exchange and search for “Permission Cloner” and click on “Get It Now” button to install it in you org.

appexchange

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ALL APPS

Permission Cloner

By Salesforce Labs

Free

Get It Now

RATING
☆☆☆☆ (0)

LISTED ON
10/27/2020

LATEST RELEASE
10/16/2020

Field and Object permission cloner for Profiles and Permission Sets

Permission cloner is an admin tool which helps in cloning field and object level permissions from one field/object to another field/object.

1 of 4 : Field Permission Template Generation

2. You can choose “Install for Admins only (Recommended)”



PERMISSION
CLONER

L A B S

Install Permission Cloner

By Salesforce Labs

☒ Install for Admins Only

☐ Install for All Users

☐ Install for Specific Profiles...

Install

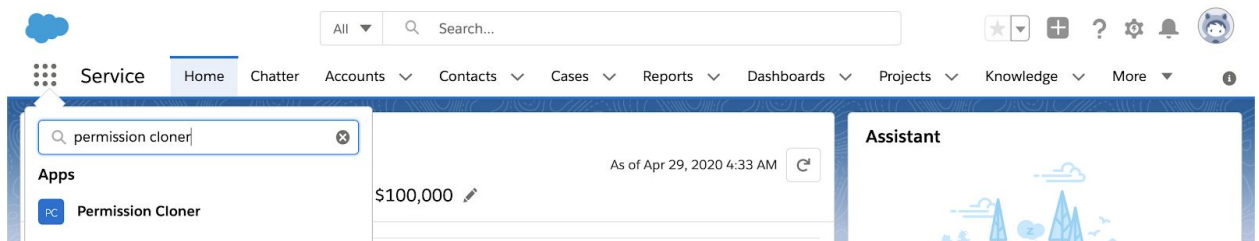
Cancel

Description

Permission cloner is an admin tool which helps in cloning field and object level permissions from one field/object to another field/object.

[Additional Details](#) [View Components](#)

- Once the installation is completed, switch to lighting experience and search for “Permission Cloner” in app launcher



The screenshot shows the Salesforce Lightning Experience interface. At the top, there's a search bar with the text "permission cloner" entered. Below the search bar, a list of apps is displayed, with "Permission Cloner" (PC) highlighted. The interface also shows a navigation bar with tabs like Service, Home, Chatter, Accounts, Contacts, Cases, Reports, Dashboards, Projects, Knowledge, and More. On the right side, there's an "Assistant" panel with a blue header and a graphic of a mountain and clouds.

- Click on “Permission Cloner” app and see if the “Permission Cloner” tab is visible

All

Search...

Permission Cloner

Permission Cloner

Welcome To Field And Object Permission Cloner

Select Permission Type

☒ Field Permission
 ☐ Object Permission

Generate Permission For

☐ Profile
 ☐ Permission Set
 ☒ Both

Template Options

☒ Generate Template
 ☐ Already Have Template

Please select profiles/permission sets to clone the permissions

Profile :

Available

Selected

Analytics Cloud Integration User

Analytics Cloud Security User

Chatter External User

Chatter Free User

Chatter Moderator User

Permission Set :

Available

Selected

Please fill the below template to clone field permissions from "From Field" to "To Field"

From Object (API)	From Field (API)	To Object (API)	To Field (API)	Action
--None--	--None--	--None--	--None--	

+ Add Rows

Download Template

Instructions :

1. Please select "Update permission in the system" if you want to update.permission for selected profiles/permission sets.

2. Please select "Delete Existing Field Permission" if you want to remove the additional permission from the "To Field" for selected profiles/permission sets.

3. To generate a CSV file to load manually via any data loading tool unselect the below checkboxes and click on "Submit".

☐ Update permission in the system
 ☐ Delete Existing Field Permission

Submit

5. If the "Permission Cloner" tab is not visible then follow below steps
 - a. Verify you have custom domain enabled for your org. If not, then please enable it.
 - b. Go to profile and give access to "Permission Cloner" tab under "Custom Tab Settings"

Custom Tab Settings

About Mass Assign Permissions	Default On	Orders	Default On
Badges	Default On	Permission Cloner	Default On