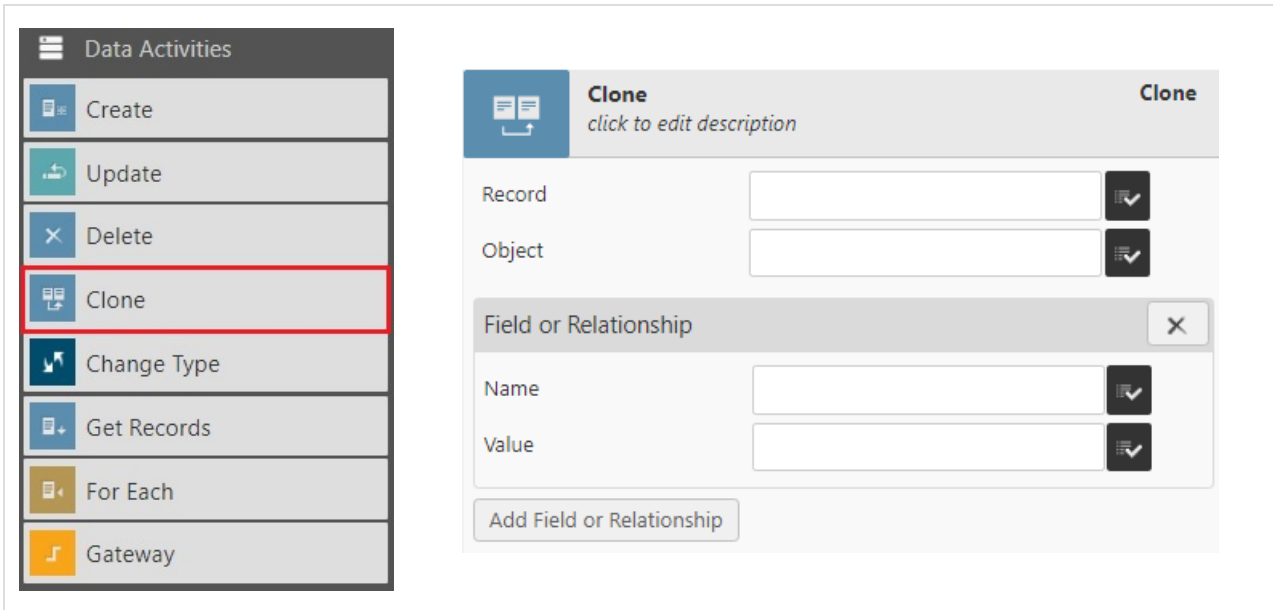


Clone

Last Modified on 28/05/2020 3:40 pm AEST



Purpose

Clone a Record from one Object to another.

Configuration

Setting	Description
Record	<p>The Record to be cloned. This can be set via:</p> <ul style="list-style-type: none">• Record• Parameter• Calculation
Object	<p>The destination Object that the Record(s) will be cloned to. This can be the same object as the source object or a different object</p> <p>Note: The destination Object may be the same or a different Object. If it is the same Object, all Fields will be copied across. If it is a different object, only Fields of the same Name and Type will be copied across automatically.</p>
	<p>Update additional fields or relationships in addition to what is automatically copied as above.</p> <p>Click on <i>Add Field or Relationship</i> for each additional entry to create.</p> <p>Name</p>

Setting	The Name of the Field or Relationship to be updated in this entry. This can be set via:
	Description <ul style="list-style-type: none"> Field
Field or Relationship	<ul style="list-style-type: none"> Relationship Calculation
	If updating via a Relationship, two additional options are displayed <ol style="list-style-type: none"> Add related record - used to link multiple Records via this Relationship Replace existing record - Replace the currently linked Records
	Value The Value to set the Field or Relationship to. This can be set via: <ul style="list-style-type: none"> Parameter Calculation

Parameters created

Parameter	Type	Description
[Activity Name].Record	Record	The record created by the clone activity

Additional Notes

- Resource Keys can be set to restrict duplicate records. An attempt to clone a Record that violates any Resource Keys for that Object will not be allowed to clone.
- Relationships are clones based on the Relationship Type. A property called 'Clone' is set based on the following options:
 - *Drop* - this Relationship is dropped when record is cloned so the new record will have this relationship empty
 - *Clone References* - Will copy the relationship to the same record e.g. if Owner is Clone Reference, then the new record will point to the same Owner.
 - *Clone Entities* - A copy of the destination is also made and the new Record will point to the new destination e.g. If *Course* has *Notes* with Clone Entities set, then cloning the *Course* will also clone all the *Notes*, and the new *Notes* will be linked to the new course.