ASTREA IT SERVICES
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DOLLY CLONING

APP USER MANUAL

DOLLY CLONING

OVERVIEW

Dolly is a cloning application, useful in cloning salesforce objects and its fields. This app supports point and click graphical user interface which is very simple to use. It can be much time consuming to create each and every field of an object similar to some other object having several fields. This application saves a lot of time in creating objects and its related fields again and again.

This app provides functionality to clone standard and custom objects and copies its field into a new object. Not only that, it provides the functionality to clone some selected fields of an object into some other existing object, and also provides functionality to clone fields of the same datatype multiple times in an object. This app is accessible to admins of Salesforce Org only.

The App is useful in cloning fields of Data type mentioned below:

- Auto Number
- Formula
- Lookup Relationship
- Master-Detail Relationship
- Checkbox
- Currency
- Date
- Date/Time
- Email
- Geolocation

- Number
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text
- Text Area
- Text Area (Long)
- Text (Encrypted)
- URL

DOLLY CLONING APP HOMEPAGE

Dolly APP is an easy way of creating clone of an object. You can simply select a source object and give name for the new object. All the fields will be automatically copied to the new object.

1. Clone object into new object with all it's fields being cloned.

2. Copy fields from one existing object to another existing object.

3. Clone a field into many fields of same type in one click only.

*Required Settings
1. Select **Dolly App** from the menu coming in top right corner> Click on **Dolly Home** tab.
2. **Copy** the URL coming in Top URL Panel
3. **Example** - Eg.https://dolly.ap2.visual.force.com
4. Now Go to **Setup** > in Administer > **Security Controls** > **Remote Site Settings**
5. Create a **New** Remote Site Setting > **Paste** the URL copied above inside **Remote Site URL** > **Save**

*Limitations
1. RichTextArea, Time, Rollup, External Lookup - Fields of these type cannot be cloned using this app.
2. Checkbox - For this, the default value has to be set by user after the field gets cloned.
3. Autonumber - For this, Starting number and Display format has to be set by user.
4. Formula - Formula fields referring to standard fields is not cloned.
5. Standard fields will not get cloned in this app.
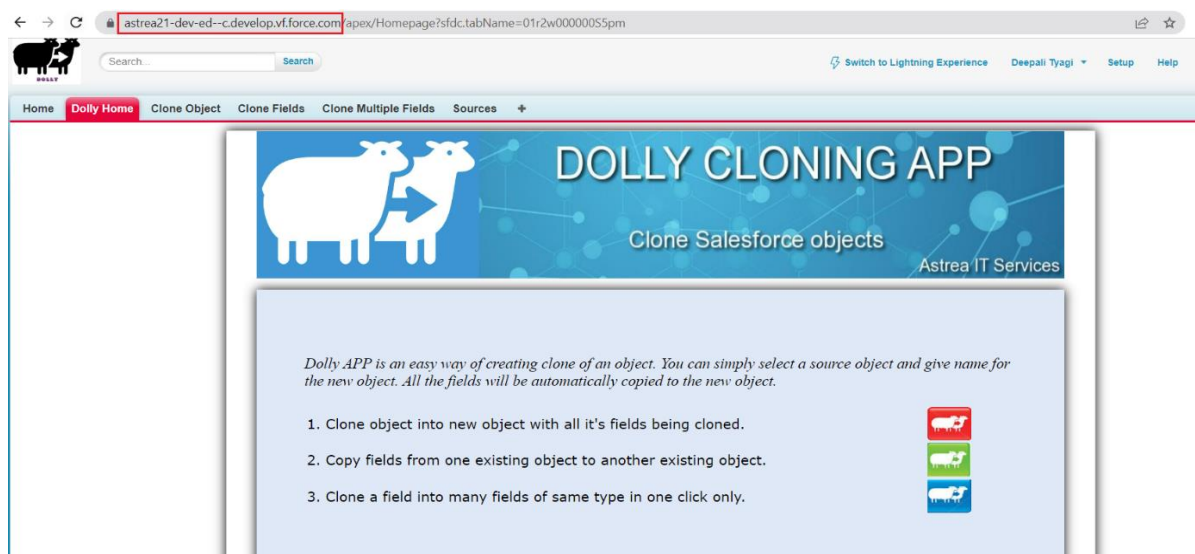
SETTINGS

Since this app uses the Salesforce API to Clone objects and fields, the user needs to add his Salesforce instance URL in Remote Site Settings. Follow the below steps to add Remote Site Settings.

Note: In new Remote Site settings you need to add the URL of classic Dolly Home tab URL for lightning users too.

Step 1: Click on 'Dolly App' from the menu (If you are in lightning, click on 'Switch to Salesforce Classic' button).

Step 2: Click on the 'Dolly Home' tab and Select the URL coming from the top panel. (URL needs to be copied from starting to force.com).

Note: URL is dependent on domain so it may vary but should be picked from classic dolly home tab only.

Step 3: To add Remote Site Settings in the Salesforce Classic, Go to Setup → Administer → Security Controls → Remote Site Settings and click on New Remote Site to create new Remote Site Settings or to add Remote Site Settings in Lightning Experience, Go to Setup → Security → Remote Site Settings and click on New Remote Site to create new Remote Site Settings.

Step 4: Enter Remote Site Name and also paste the copied url into Remote Site URL and check on Active option and then Save it.
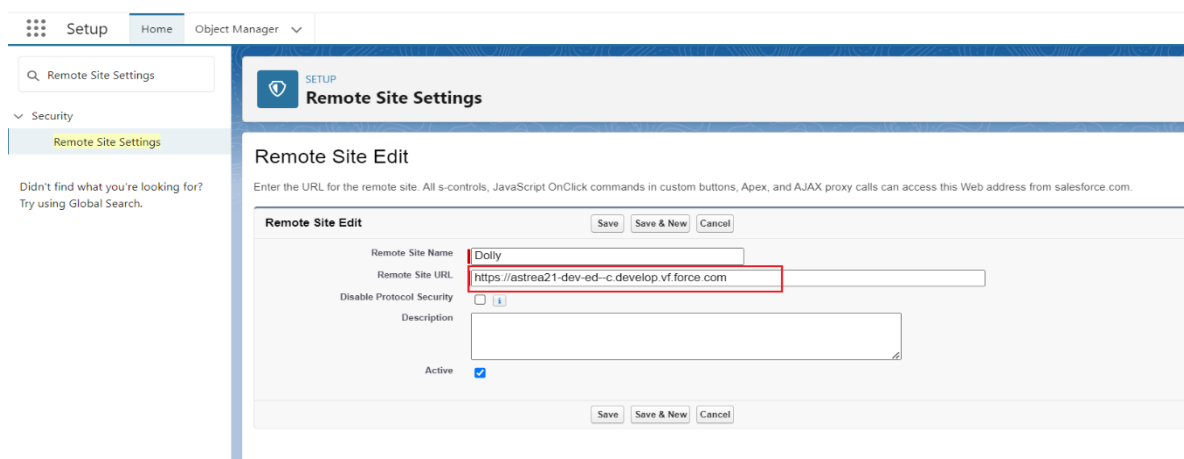
Step 5: Once your Remote Site Settings are done you can use the app in Salesforce Lightning Experience or in Salesforce Classic.

Note: We do not access or save any information from your organization.
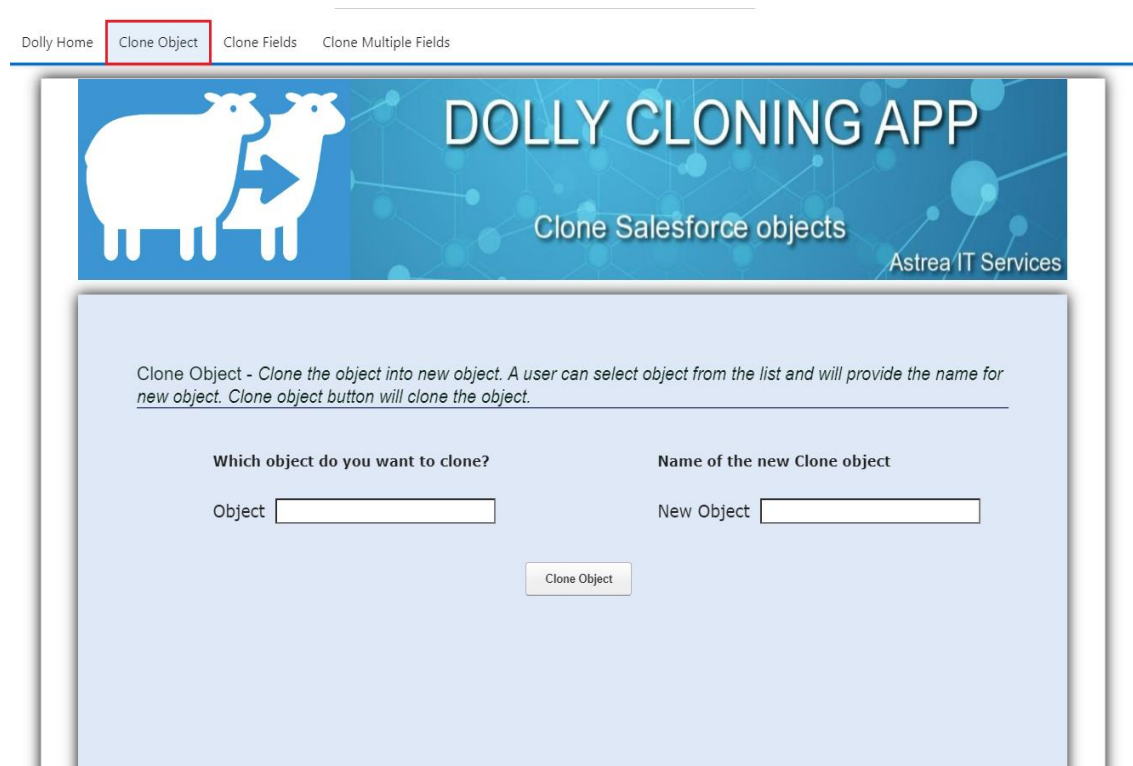
After creating new Remote Site Settings you can follow below process to work with Dolly app in your org.

HOW TO USE DOLLY APP:

The dolly cloning app consists of 4 tabs-

1) **Dolly Home: -** It provide details about app setting, its working and its limitations.

2) **Clone Object: -** To create a new object with the same fields cloned from the selected object.

Step 1: Click on Clone Object tab.

Step 2: To clone an object, select the object you want to clone (Just typing the initials of the object name displays the list of existing objects to the user).
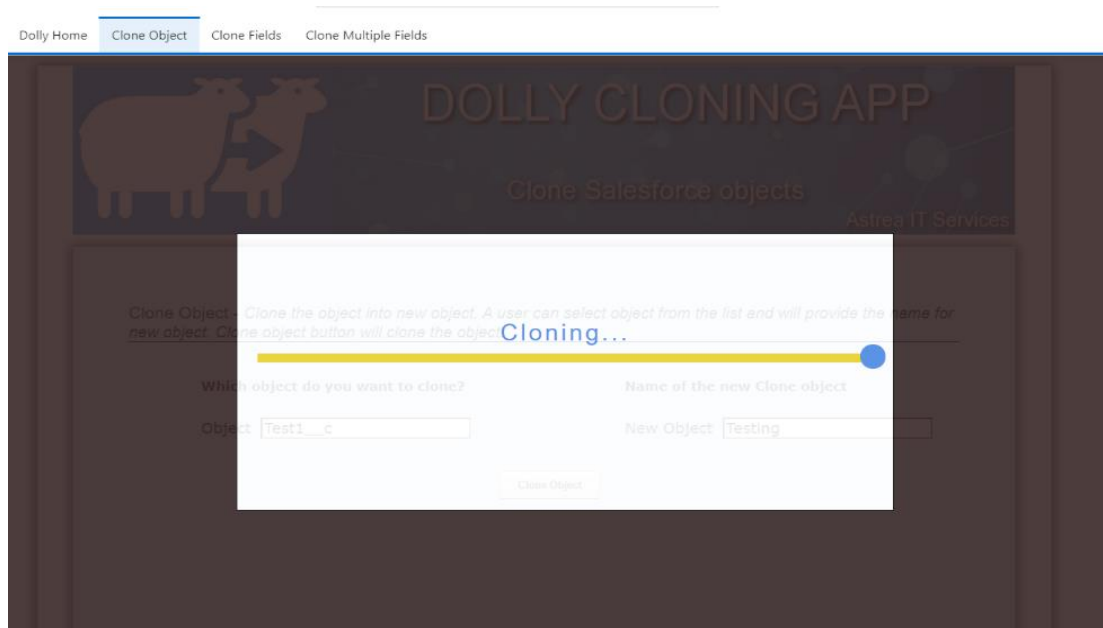

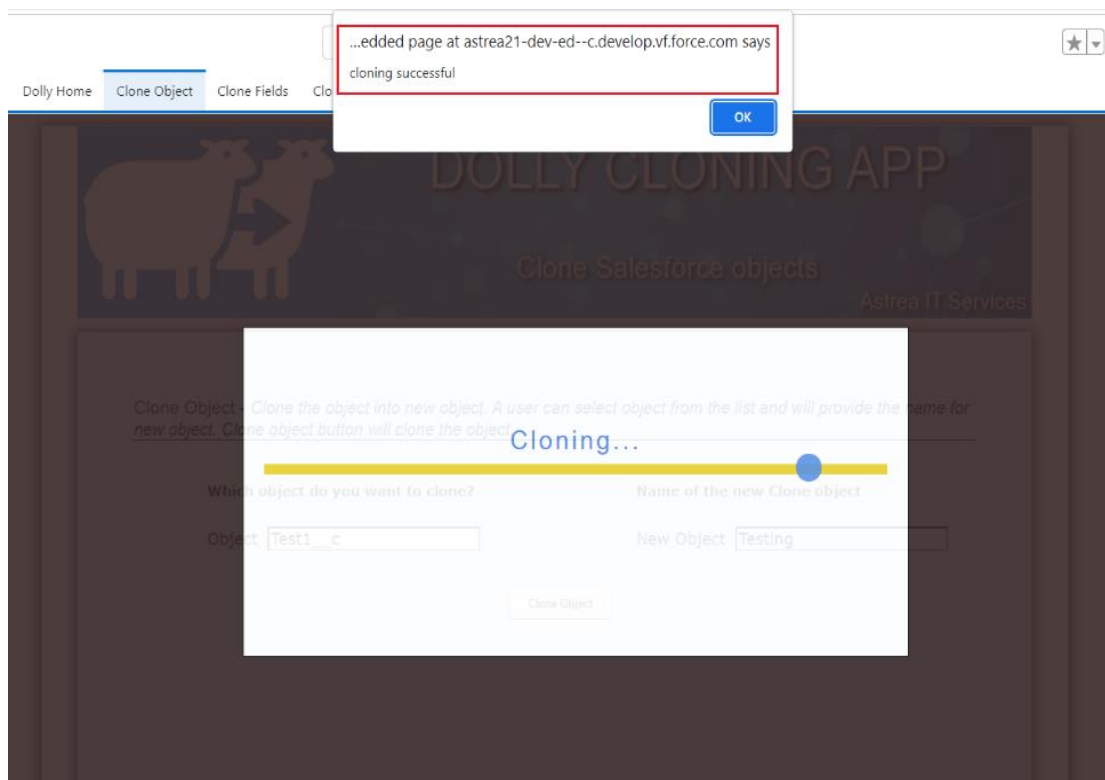Step 3: Enter the name of the new object and then click on Clone Object button.

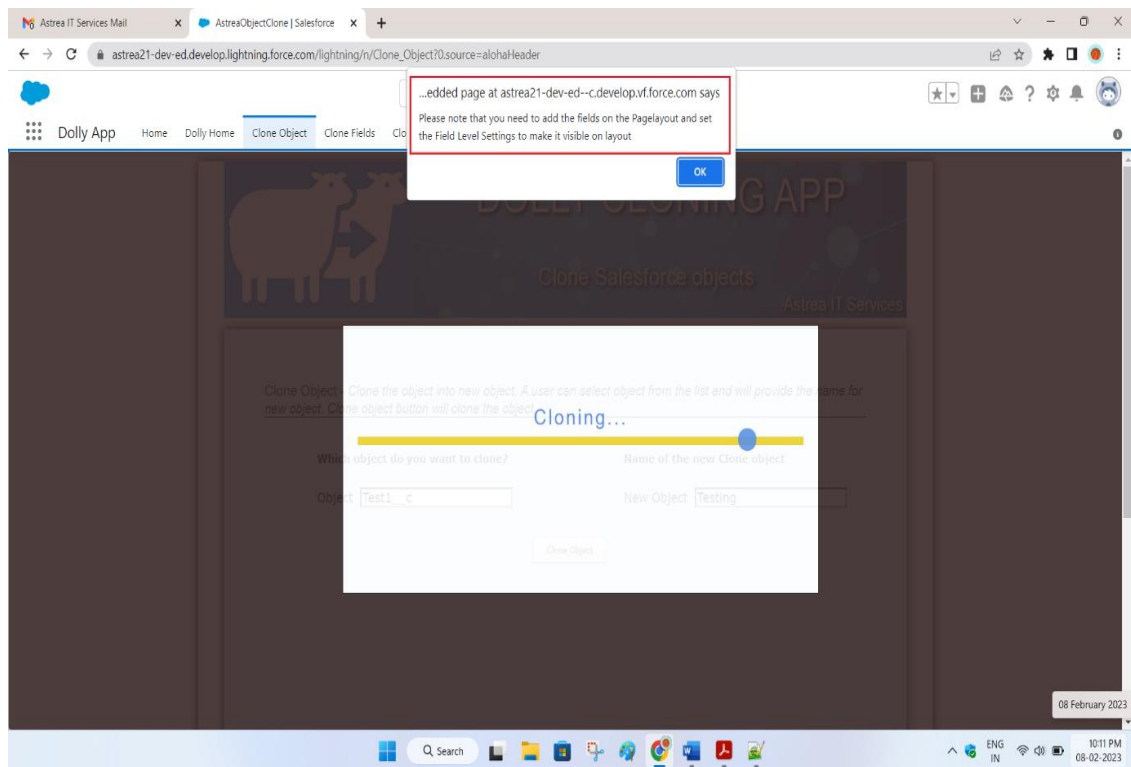Step 4: After clicking on clone object button the cloning process will start and the screen will show Cloning.

Step 5: After completing the process of cloning, an alert message of 'Cloning Successful' is shown on the screen.

Step 6: Also, a second alert will be there which will display message to add Field level security and also to add newly cloned field to page layout.

Note: If any field is not supported to cloned then after cloning process is completed, it will display all the unsupported field which is not cloned by the app.
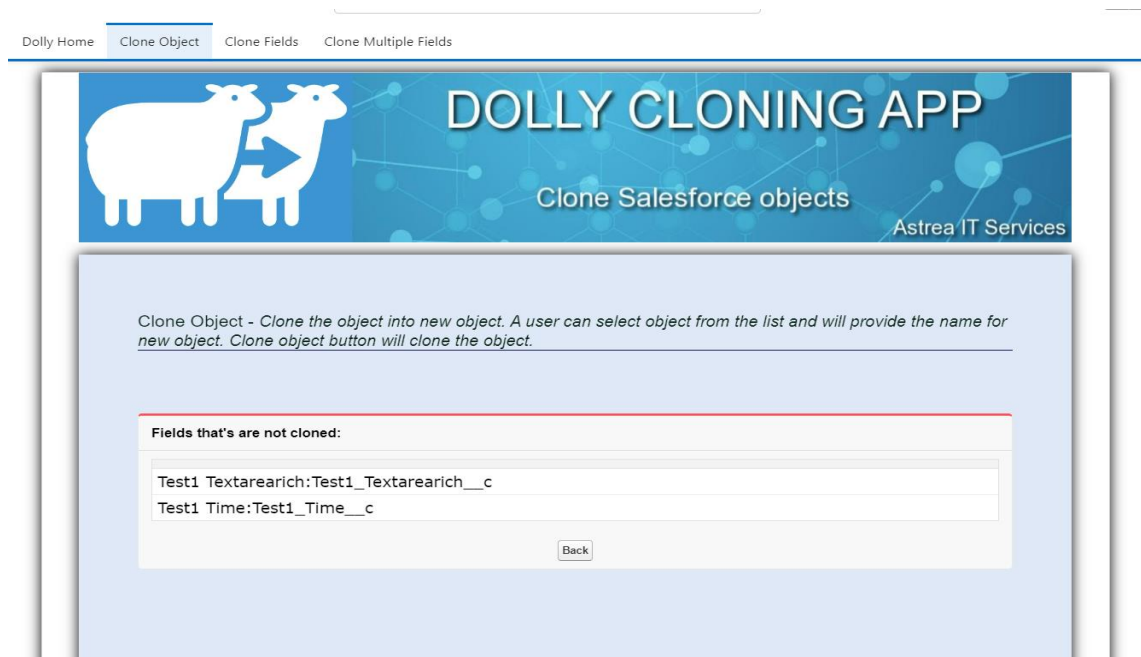
3) Clone Fields: - To clone selected fields from the source object to the destination object.

Step 1: Select the Source Object and after it all the supported fields of that object are displayed to the user.
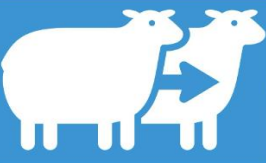

Step 2: Select the fields that you want to clone.

Step 3: Select the Destination Object (any other object already created in salesforce) and click on 'Clone Fields' button.

Step 4: After clicking on the 'Clone Fields' button, the cloning process will start and when it is done it will show one alert of successful cloning and after that a second alert will be to add the FLS on cloned fields and add them to page layout.

4) **Clone Multiple Fields: -** To clone field of similar type from the source object to the same source object.

Step 1: Select the Source Object, after selecting it the Get Fields picklist automatically gets populated with the list of all supported fields present in Source object to be cloned.

Step 2: Select the field from the picklist that you want to clone.

Step 3: Give the name of new field also you can add multiple fields of different name using add icon and then click on 'Create Field' button to clone the field.

Step 4: After this the fields are cloned on source object.

LIMITATIONS:

The current version of the tool has the following limitations –

1) RichTextArea, Time, Rollup, External Lookup - Fields of these type cannot be cloned using this app.

2) Checkbox - For this, the default value has to be set by user after the field gets cloned.

3) Autonumber - For this, Starting number and Display format has to be set by user.

4) Formula - Formula fields referring to standard fields is not cloned.

5) Standard fields will not get cloned in this app.

For any queries about the app, please contact us at support@astreait.com