



## **c360 Clone Entity Installation Guide**

Microsoft Dynamics CRM 3.0 Compatible

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## Overview and Notes

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### Overview

The Clone Entity customization allows a user to create a duplicate record of an existing Account, Contact, Lead, Case or Opportunity record.

### Microsoft CRM Compatibility

The Clone Entity customization is compatible with Microsoft Dynamics CRM version 3.0

### Technical Support

The Clone utility is a **free** c360 utility and is offered as-is. **c360 does not provide technical support for the installation or operation of this utility.**

### Installation

The Clone utility requires a manual installation on the CRM server. It is recommended that a Microsoft CRM professional certified in the installation of Microsoft CRM perform the installation of this product. c360 will assume no liability for issues that arise during the installation of this utility.



# Installation Instructions

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## Installation Instructions

Follow these steps to install Clone entity customization:

1. Extract the c360.CloneEntity(MSCRMv3.0).zip file on the Microsoft CRM server computer
2. Copy the file named 'clone.aspx' from the c360.CloneEntity.zip file to folder called 'Clone' in the same location where other c360 products reside. The default path usually is "C:\Program Files\c360 Solutions\V3\Web\CRMWeb\Clone"
3. Open the web.config file from the same location (C:\Program Files\c360 Solutions\V3\Web\CRMWeb\) and make the following changes/additions:

- a. Set the <appSettings> ISVIntegration key to "All" (please note that this value is case sensitive and that the "A" needs to be capitalized):

```
<add key="ISVIntegration" value="All"/>
```

- b. Add the following line inside the <appSettings> element tags:

```
<add key="CRMServer" value="http://localhost:5555"/>
```

This line directs the customization to the appropriate website running Microsoft CRM. If Microsoft CRM is not installed under the default website, this value may need to be changed.

4. Open the isv.config file from the "\_Resources" folder where Microsoft CRM was installed;
  - The default location where CRM 3.0 is a new installation is "C:\Program Files\Microsoft CRM Server\CRMWeb\\_Resources"
  - The default location where CRM 3.0 has been upgraded from CRM 1.2 is "C:\inetpub\wwwroot\\_Resources"

Modify the isv.config file to add the text below to each Microsoft CRM entity for which you want the Clone Customization to appear.

To create a button to clone an entity from the toolbar for a record, insert the following lines inside the <Entities> element. Please note that you will need to add this text for other entities as desired. Refer to the example isv.config file. The supported entities include Lead, Contact, Account, Case, Opportunity, Competitor, Quote, Order and Invoice.

```
<account>
  <ToolBar ValidForCreate="0" ValidForUpdate="1">
    <Button Title="Clone"
      ToolTip="Clone this record."
      Icon="/_imgs/ico/16_convert.gif"
      Url="/c360/Clone/Clone.aspx"
      PassParams="1"
```



```
WinParams="height=200,width=350;menubar=no;status=no;toolbar=no;"  
WinMode="0"/>  
</ToolBar>  
</account>
```