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c360 Clone Entity
Installation Guide

Microsoft CRM 1.2 Compatible

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Overview and Notes_____

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 CRM version 1.2.

Installation Instructions _____

Installation Instructions

Follow these steps to install Activity Summary:

1. Extract the c360.CloneEntity.zip file on the Microsoft CRM server computer

2. Copy the file named 'clone.aspx' from the c360.CloneEntity.zip file to the \inetpub\wwwroot\Custom\c360\Clone folder on the server where Microsoft CRM is installed. If a Custom\c360\Clone folder does not exist, create it.

3. Open the \inetpub\wwwroot\web.config file on the Microsoft CRM server and make the following changes/additions:

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

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

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

      ```
      <add key="CRMServer" value="localhost"/>
      ```

      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 \inetpub\wwwroot_Resources\isv.config file and modify it to add the text below to each Microsoft CRM entity for which you want the Clone Customization to appear. An example isv.config file has been included in the c360.CloneEntity.zip file. This file may be used in place of the default file in your installation if no other changes to your file have been previously made:

   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 and Opportunity.

   ```
   <account>
       <ToolBar ValidForCreate="0" ValidForUpdate="1">
           <Button Title="Clone"
               ToolTip="Clone this record."
               Icon="/_imgs/ico/16_convert.gif"
               Url="/Custom/c360/Clone/Clone.aspx"
               PassParams="1"
               WinParams="height=200,width=350;menubar=no;status=no;toolbar=no;"
               WinMode="0"/>
       </ToolBar>
   </account>
   ```

KBA-01013
FAQ: The type or namespace name 'Proxy' does not exist in the class or namespace 'Microsoft.Crm.Platform'

Problem

Error Message: CS0234: The type or namespace name 'Proxy' does not exist in the class or namespace 'Microsoft.Crm.Platform' (are you missing an assembly reference?)

This error message occurs when two required MS CRM dll's are not present on the CRM Web Server.

Solution

Ensure that the following two dll's are present in the 'bin' folder of the MS CRM web application folder (typically 'inetpub\wwwroot').

1.) Microsoft.CRM.Platform.Proxy.dll
2.) Microsoft.CRM.Platform.Types.dll

If these dll's are not present, locate them on the Microsoft CRM Server CD and copy them into the 'bin' folder.

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