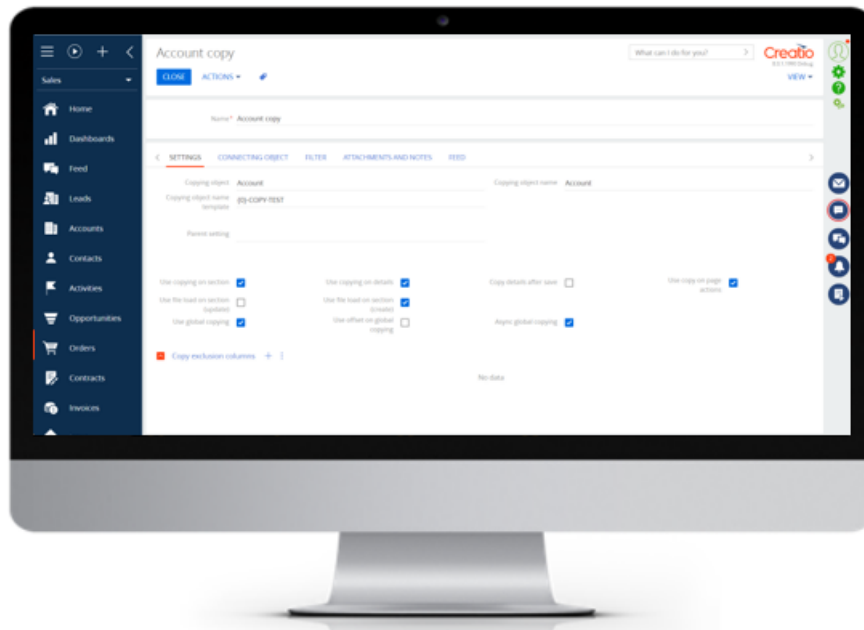




COPY OBJECT RECORDS FOR CREATIO



Guide to setup and utilization

Product description

The product is designed to simplify the work with system objects by setting the rules for their copying. With its help, the user:

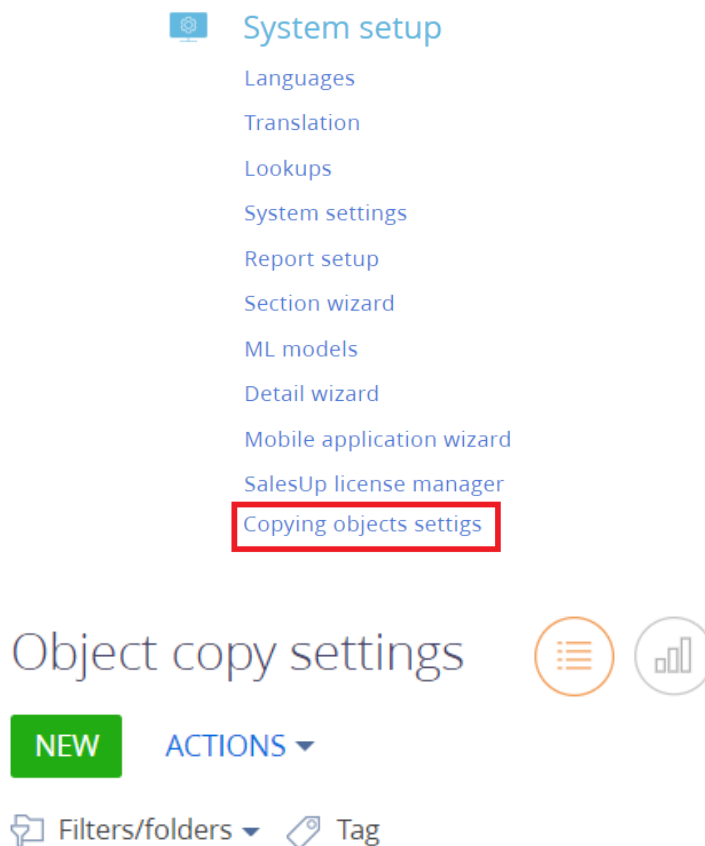
- can independently specify the values of what details to copy or block the copying of column values;
- change the values of the copied object before saving;
- copy not only the object itself but also objects related to it;
- copy great amounts of data in the background;
- upload/download data or its updates from one system to another one.

The product can be configured for any system object. For example, when creating a copy of the Order, copy the values on the "Products" details, in the "Account", "Delivery address", "Payment type" fields; transfer data from the "Contacts" section to another system, update them; copy the planning report with related objects; start copying the annual planning report in the background.

Product setup

Creating a new copying setting

After installing the module, to create a new copying setting, go to «System designer». After that, in the «System setup» menu, choose «Copying objects setting» and press «New»:



Filling in a page profile

On the copying settings page, there are following fields:

Name - the name of the setting;

Copying object – the object for which the setting is being created;

Copying object name – filled in automatically, based on the object of copying;

Copying object name template - the name of the copied record. The default value is "{0} - COPY", where {0} is the original name. This is a text field and it can be edited;

Parent setting – filled in automatically during creation of the related object copy setting. Works with bulk copying setting.

Before you start creating a setting, make sure that copying is configured for the necessary object columns in the section settings, since the values in the fields are copied depending on the settings in the Section Wizard. If copying a column is not enabled in the section wizard, it will not be copied. If copying a column is configured in the section, but the value does not need to be copied, then the module has the ability to block column copying through the “Copy exclusion columns” detail.

Values from details are copied if the detail is listed on the “Copying child objects” detail on the CONNECTING OBJECT tab.

In each copy setting, either "Use copy on section" or "Use copy on detail" must be activated in order for the module setting to override the system setting.

Copying functions

Use copying on a section

A function that allows you to replace the basic copying settings in a section with a setting created in a module. After this function is activated in the settings, when you click on the COPY button in the section, the selected record will be copied in accordance with the module settings.

Use copying on section

Use file load on section (update)

Use global copying

Use copying on details

Use file load on section (create)

Copy details after save

Use copy on page actions

Orders

NEW ORDER ACTIONS ▾

1 7 ✓ ▾ <Start date> till <Duc

Number	Date
ORD-4	7/8/2022 3:50 PM

OPEN **COPY** DELETE

Use copying on details

A function that allows you to apply copy values to the details of an object.

Use copying on section

Use file load on section (update)

Use global copying

Use copying on details

Use file load on section (create)

Copy details after save

Use copy on page actions

For example, let's create a copy setting for the "Order" object with copying the "Product" detail.

ORD-4 What can I do for you? > **Creatio** 8.0.1.1990 Debug VIEW ▾

CLOSE ACTIONS ▾

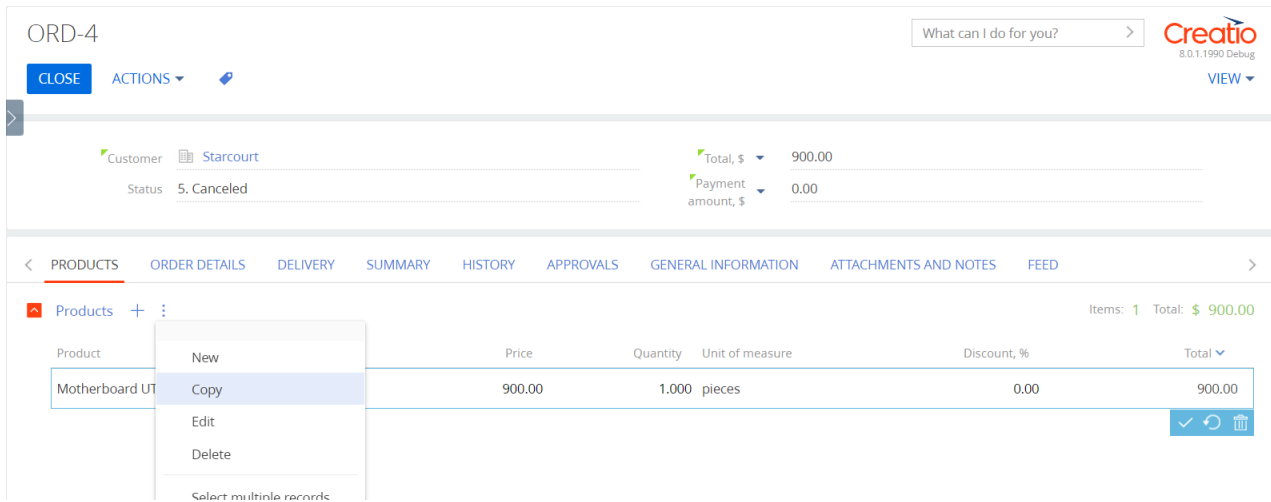
Customer **Starcourt** Total, \$ 900.00
 Status 5. Canceled Payment amount, \$ 0.00

< PRODUCTS ORDER DETAILS DELIVERY SUMMARY HISTORY APPROVALS GENERAL INFORMATION ATTACHMENTS AND NOTES FEED >

Products + : Items: 1 Total: \$ 900.00

Product	Price	Quantity	Unit of measure	Discount, %	Total
Motherboard UT165LZ-32P1 (sample)	900.00	1.000	pieces	0.00	900.00

We select the products that we need to copy and select the "Copy" function



The chosen product would be copied.

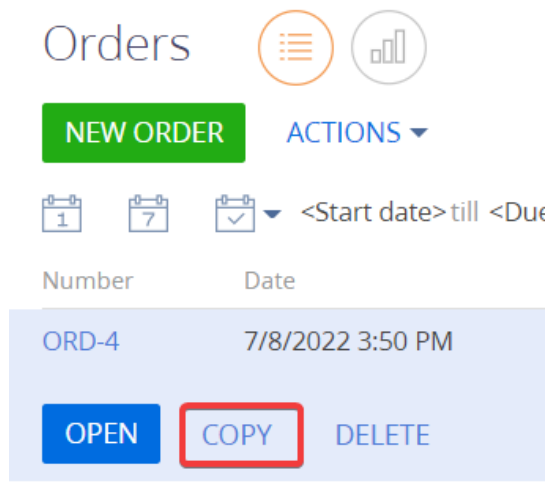
Copying a detail after saving

A function that allows you not to save changes to the copy object before the user makes changes to the chosen fields. After clicking on the SAVE button, the details are filled in, but the values in the changed fields remain.

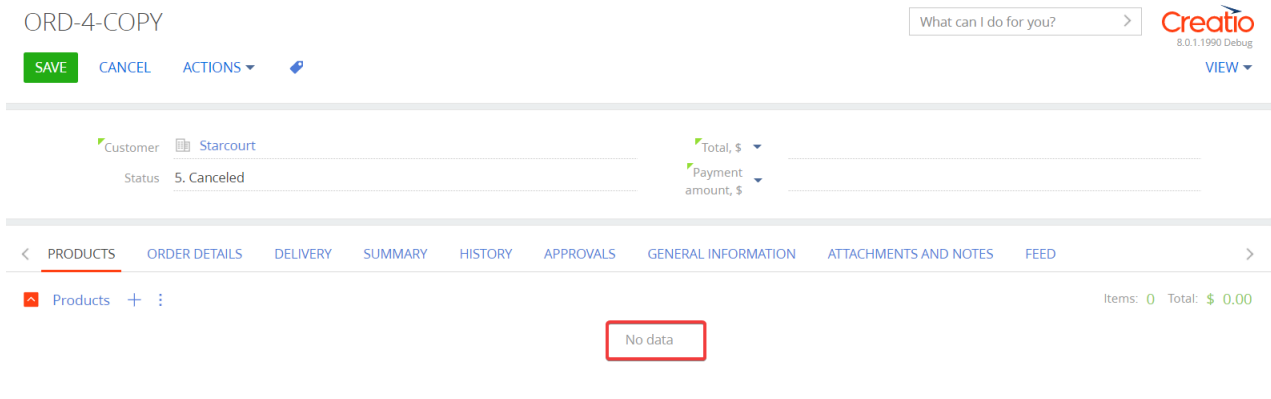


For example, let's create a copy setting for the "Order" object with the given condition and copy the "Products" part.

To copy the selected order, click on the COPY button

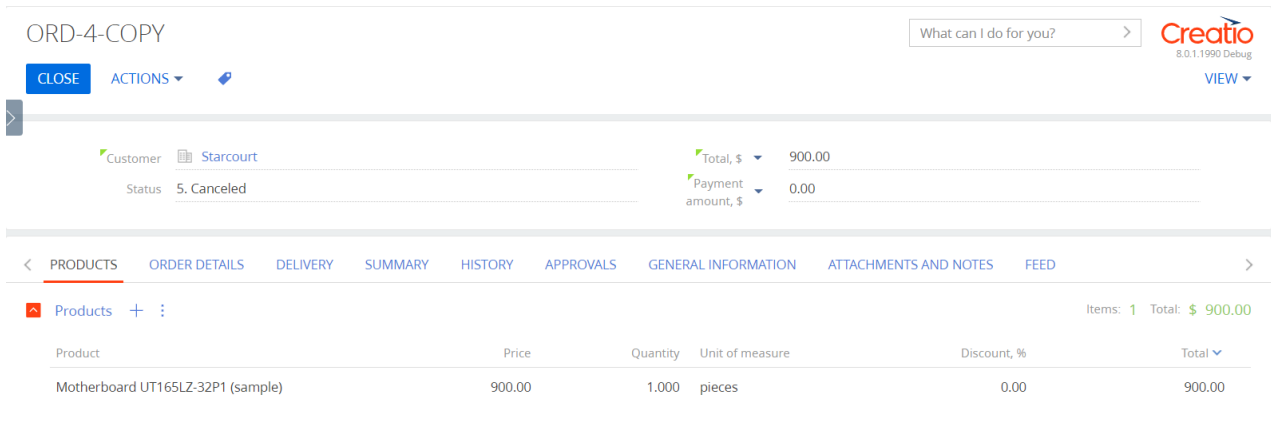


The window for editing the order will open, with an empty detail "Products"



This record is not saved in the database and you can make changes to it. Let's change the customer from "Accom" to "Astra Optium" and click on the SAVE button.

After clicking on the SAVE button, the record is saved in the database, and the "Products" detail is filled with values from the copied order.



Use file load on the section

It can be used for:

1. Copying records from one environment to another, through the function "Use loading from a file in the section (create)";
2. Updates of already transferred records, via the function "Use loading from file in section (update)".

The difference between these two functions is that during loading, when selecting a creation, new records will be created, even if they are duplicates of existing ones. When you select the update function, new records will not be transferred, only existing ones will be updated.

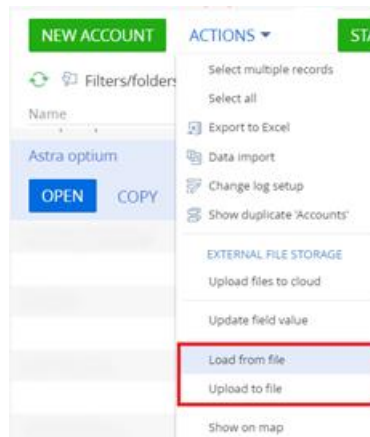
To use this function, the module must be installed on both environments. Data from the section is uploaded to a json document.



After creating the function, you need to go to the settings object section, and in the ACTIONS menu:

- to upload data from the section, select "Upload file";

- to load a file in order to update records, select "Load from file";
- To load a file to copy records from another environment, select "Load from file (create)".



Use global copying

It consists from the following settings:

Use copying on section <input checked="" type="checkbox"/>	Use copying on details <input type="checkbox"/>	Copy details after save <input type="checkbox"/>	Use copy on page actions <input type="checkbox"/>
Use file load on section (update) <input type="checkbox"/>	Use file load on section (create) <input type="checkbox"/>		
Use global copying <input checked="" type="checkbox"/>	Use offset on global copying <input checked="" type="checkbox"/>	Async global copying <input checked="" type="checkbox"/>	

Use global copying is a function that allows you to copy an object along with related objects. When activated, on the CONNECTING OBJECT tab, the "Mass Copying Connections" detail appears where the copy rules for each linked object are added. The setting is described in more detail in section 1.2.2 Linked objects, detail "Mass Copying Connections".

Use offset on global copying is a function that allows you to shift values in the copied object. For example, date. Appears after activating the "Use Mass Copying" function. The setting is described in more detail in section 1.2.2 Related objects, detail "Copy offset columns".

Asynch global copying is a function that allows you to copy large amounts of data in the background. After starting the download, you can continue to work as usual. The system will notify you when copying is completed through automatic notifications.

Copying exclusion columns

In the "Copy exclusion columns" detail, you can configure the list of columns from which data should not be copied. From the example in the screenshot, when copying the "Order" object, the data in the "Date" column will not be copied.

Even if in the Section Wizard, copying this column is allowed, then when copying an object, the data from this column will not be copied.

Copying offset columns

The "Copy offset columns" detail is displayed on the SETTINGS tab after selecting the "Use offset on global copying" function. Here you can set up a list of columns in which the values should not only be copied, but also shifted by a certain number of units. For example, shifting the date value, when copying a report, to the next period: year, quarter, month, etc. This will eliminate the manual filling of report dates and ensure the accuracy of filling. To do this, you need to add the columns "End date" and "Start date" to the detail.

Copy offset columns + :

Objects copying setting	Column	Column name
Order	Actual end date	ActualDate
Order	Created on	CreatedOn

After that, in the section for which the setting was created, in the bulk copy modal window, the "Shift" function appears, where the shift period is set.

Planning

NEW ACTIONS

Select multiple records

Select all

Export to Excel

Data import

Change log setup

Update field value

Load from file

Load from file (new)

Upload to file

Global copy

Global copying

Planning Select all Deselect all

4.1 Payment

COPY SELECT ALL CANCEL

Connecting object

The CONNECTING OBJECT tab contains settings for copying objects associated with the object in the "Copy object" field. There are two setup details: "Copying child objects" and "Mass Copying Connections".


Copying child object detail


On the "Copying child objects" part, a list of parts is created, the data from which must be copied when copying an object. For the "Product in order" object, you can add, for example, the details "Order approval" and "Actual costs". Thanks to this function, when copying a record of the "Product in order" object, the data from these details will be copied and they will not need to be filled in again. It works in together with the "Use copying on section" feature.

Copying child objects + :

Name ^	Position	Notes	Copying object
Product in order	0		Order approval
Product in order	1		Actual costs

In order to add a detail, you need to click "+". After that, the part copy settings page will be displayed with the "Parent setting" field filled in.

Trademark products What can I do for you? > 

SAVE CANCEL ACTIONS ▾  VIEW

Name* Trademark products

< **SETTINGS** CONNECTING OBJECT FILTER ATTACHMENTS AND NOTES FEED

Copying object Product Copying object name Product



Copying object name template {0}-COPY

Parent setting **Trademark** On global copying On usual copying



Parent column* Trademark Parent column (Name)

Mass copying connections detail

The Mass Copying Connections detail is displayed after selecting the Use Mass Copying setting. In order to copy not only a record, for example, Trademark products, but also an object associated with it, for example, Order, you need to create a setting for copying products in the module and add it to this detail in the Order setting.

Object copy settings  

ADD ACTIONS ▾

 Filters/folders ▾  Tag

Name	Use copy on page actions	Use copying on section
+ Trademark products	Yes	Yes
+ Trademark	Yes	Yes
+ Order-COPY	No	Yes
+ Order	No	Yes
+ Order-COPY	No	Yes
+ Контрагент	No	Yes

After pressing “+” on the detail, the copy setting selection page will be displayed. In the "Copy setting" field - our setting for copying products. In the field "Column of connection" - a column of connection with the object.


Trademark products / Global copying connection

SAVE CANCEL ACTIONS ▾

Copying setting [Order](#)

Connection column [Product in order \(by column Product\).Product](#)

It will look this way on the detail:

 Mass copying connections + ⋮

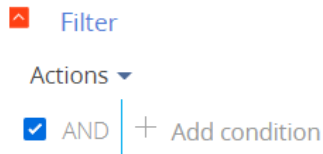
Position	Current copying setting	Connection column	Copying setting.Async global c...
0	Trademark products	Product in order (by column Product).Product	No
1	Trademark products	Order in folder (by column Order)	Yes
2	Trademark products	Account (by column Parent account)	No
3	Trademark products	Product in order (by column Product).Product	No

Every time you copy an object, the objects for which the copy settings are added on this part will be copied.

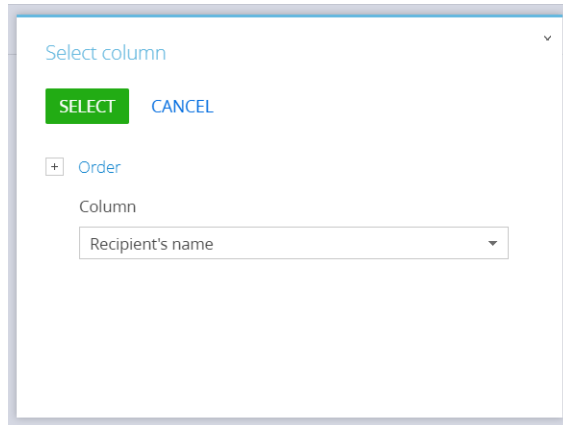
Filter setup

Filters are configured on the FILTER tab. The module uses the standard advanced filtering functionality with all available actions.

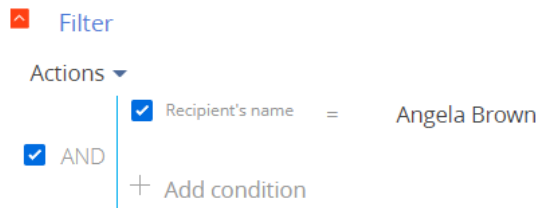
In order to set up filtering conditions, click on "Add condition".



In the window that opens, in the "Column" field, select the column of interest for the object, for example, "Recipient's name", and click the "Select" button.



Next, select values from the lookup, specify the required value, for example, «Angela Brown»



Therefore, for each entry that matches the filter conditions, the object copy setting will be applied. In our example, this is for all records in the order object that have the value “Angela Brown” in the Recipient Name field.

Saving and editing of copying setting

To save the copy settings, click the SAVE button on the toolbar. If you exit the setting before pressing the save button, the setting will not be saved.

To edit, just go to the settings page, make changes and click SAVE.

To deactivate the settings, just uncheck the corresponding functions.

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