

## Related Records – Cloning (related) and Copying (unrelated)

**Cloning Related Records** – in the Model, you are able to create a related child record through cloning [Navigation Pane > Related Records > select the record you want to clone > select the Clone Record button]. A clone is effectively a copy of the selected record and allows the agency to select which record items they want to include in the cloned copy.

**Tip:** We do not recommend cloning the record item of Record Details – this will bring over date fields that are not applicable to your related child record and will affect your reporting, as Opened, Expiry, and Issued dates will not be representative of your cloned child record but instead of the parent record they were cloned from. Since these items tend to be record-specific, we also do not recommend ever cloning the following as indicated by yellow highlight:

The screenshot shows a cloning interface with two main sections: "Record Type - Specific Information" and "General Record Information".

**Record Type - Specific Information:**

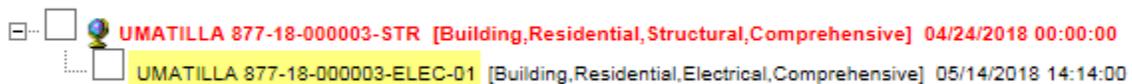
- Fee Items (Select)
- Workflow Status
- Inspection (Select)
- Custom Fields (Select)
- Additional Info
- Valuation Calc
- Workflow Task Specific Information
- Status or New Status: --Select--
- Status History

**General Record Information:**

- Record Details (Set Application Description)
- Parcel
- Owner
- Address
- Assets
- Licensed Professionals (Select)
- Contact (Select)
- Document
- Preserve Dates
- Record Conditions (Select)
- Inspection Conditions (Select)
- Conditions of Approval (Select)
- Education
- Continuing Education
- Examination
- Record Comments
- Activities

Based on scripting in the Model, the cloned child record will be automatically related to the record it is being cloned from and will also assume the same permit number as the record it is being cloned from with the record type extension appropriate to the type created and an -01, -02, -03, etc. indicator for which child number it is in sequence. It does get a unique IVR # for use in scheduling any inspections through IVR.

**1 record(s) added successfully.**



Once created, jump to your newly cloned copy via Related Records - go back to the Navigation Pane list and go thru each section to fill in all the required fields and necessary data to include the following: Custom Fields (ASI – is named as per the Record Type), potentially amend the Description of Work, Other Contacts and Professionals (if not selected as cloned items when

copied), Submitted Job Value (if applicable), Valuation Calculator (if applicable) and Workflow. Completion of App Info Custom Fields (ASI), Submitted Job Value, and/or Valuation Calculator will not automate fees on clones/copies for those record types where fees are traditionally automated at intake – instead, fees will need to be added manually through Add Fee.

**Copying Unrelated Records:** A business case might be an apartment complex that is replacing hot water heaters in every apartment, each unit is a different address, for example there are 20 units. Instead of creating 20 new records one at a time, create one initial record and copy it as unrelated on the basics and then add the individual addresses to each record. The Owner, Professionals, and Description of Work will all be the same in this case. Copying records in this way for certain business cases can potentially save a lot of time.

To create unrelated copies from a new record: go to your initial new record > click on Description of Work/Copy Recs (Unrelated) in the Navigation Pane > and select Clone from the Menu dropdown. You will then have the option of selecting the type/types of permits that you want to create as copies, the number, and which record items you want to include in your copies [***note prior recommendations on what not to copy also apply here***]. This method for copying records will not create them as related child records and each permit will have a distinct record number.

After checking the record items that you wish to copy, click 'Submit' and the unrelated copy will be created. A pop-up window will tell you if any information failed to transfer over. Be sure to go back in and add the necessary data to the copied record as with the related clones; Custom Fields/ASI, Description of Work, Workflow, etc. It is important to note, as with related clones, that completion of Custom Fields/ASI, Submitted Job Value, and/or Valuation Calculator will not automate fees on unrelated copies for those record types where fees are traditionally automated at intake - fees will need to be added manually through Add Fee.