

New Rule

Back to List

Basics

Rule Name

Reset notes and title on sales clones

Sort Order

100

Description

Clones of sales contacts start without notes and with a placeholder title.

Object

Contact (Contact)

Active

Active

If

The rule applies when the cloned record matches these conditions. With none, it applies to every clone.

Besides fields, a condition can test who is cloning (profile, role, permission sets) and the record type.

Field

Operator

Value

1

Department (Department)

Equals

Sales

+ Add Condition

Then

What to do to the clone's fields. Fields not listed here keep Salesforce's standard clone value.

Field

Action

Value

Title (Title)

Set To Value

To be confirmed

ways to clone: Flow action, record action, page button

changes to the standard Clone
button, which keeps working

languages: English, German,
Spanish, French (CA), Portuguese
(BR)

Salesforce's Clone button copies every field. Custom Clone adds a **second way to clone** that applies your rules to the copy: **blank** fields, **set** values, **copy** one field into another, fill dates, the user or **text built from a template**, or **protect** a field. Choose which **related records** come along, and keep a **log** of what each clone changed.

A clone is only useful if the copy is ready to use

Cloning an Opportunity, Case or Contract copies stale statuses, old dates, notes and owners. Users have to remember which fields to reset, so copies go out wrong, or teams build custom Flows and code for every object.

1

Clean copies, every time

Rules say: **if** the copy matches some conditions, **then** blank, set, copy, fill or protect fields, and **else** do something different. Fields no rule mentions keep their copied value.

2

Related records come too

Choose which related records a clone copies, for example an Account's Contacts, per set of rules.

3

Three ways to start a clone

A **Flow action**, a **quick action** on the page layout or a **button** on the Lightning record page. Nothing is installed on any object.

4

Nothing is hidden

A **Log** shows each clone, the rule that ran, and every field it changed with the old and new value.

5

Safe by default

The copy is made with the person's **own field access and sharing**, and the standard Clone button is not changed.

6

Configured, not coded

Admins write rules in the app. Rule order decides which rule wins when two set the same field.

Without Custom Clone

- Users must remember which fields to reset after each clone
- Copies go out with old dates, statuses and notes
- A custom Flow or Apex for every object that needs cloning
- No record of what a clone changed

With Custom Clone

- Rules clean the copy as it is made
- Related records copied by your choice
- One app, one set of rules, many objects
- A log of every clone and every changed field

WHAT IT DOES

Rules that clean the copy

Write a rule in If / Then / Else

Choose the object, add conditions on the copy, and add the actions: blank, set to value, copy from a field, fill dates, user or text from a template, or protect. The Rules tab lists every rule with its object, order and status.

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Then

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The rule editor.

Related Records

New Related Set

A set copies one kind of related record, for example the Contacts of an Account, whenever that object is cloned. The copies get the rules written for the related object on the Rules tab.

Search

Q, Name, description or object

Cloned Object

All objects

Name	When Cloning	Copies	Linked By	Related Object Rules	Most Per Clone	Order	Active	
Reset Account Contacts People at the account come along with it.	Account	Contact	Accountid	All active rules	200	100	Active	

Related Records.

Choose the related records to copy

Define which related records a clone copies as well, for example Contacts with an Account, and what to reset on them.

A clone log

Each clone is logged with who cloned it, the rule that ran, the outcome, the fields changed with old and new values and the related records copied.

Clone Log

The newest 200 clones. Records appear here while Log Every Clone is on in Settings.

Search

Q, Record id, rule or message

Object

All objects

Outcome

All

When	By	Object	Cloned Record / Copy	Rules / Fields Changed	Related Copied	Result	
10/23/2026 9:29:13 PM	John Lawton	Contact	003gk000019ut5n0AK 003gk000019ut5n0AK	Reset notes and title on sales clones Fields Changed: 2	0	Succeeded Record cloned. The rules changed: Title, Description.	Hide Changes
Fields Changed On The Copy							
Field	Was	Now	Rule				
Title	Account Executive	To be confirmed	Reset notes and title on sales clones				
Contact Description	Met at the conference	(blank)	Reset notes and title on sales clones				

The Clone Log.

HOW IT WORKS

Up and running in four steps

1. Switch it on

On the Settings tab, make sure Enable Custom Clone is on.

2. Write a rule

On the Rules tab, choose the object and write the rule.

3. Give people a way to clone

Add the quick action, place the button, or use the Flow action.

4. Clone and check

Clone a record and check the copy and the log.

Who it is for

- **Sales and service operations.** clone renewals, cases and quotes with the right fields reset.
- **Admins.** replace one-off Flows and code with rules anyone can read.
- **Audit-minded teams.** see exactly what each clone changed.

Built for trust

- **Native to Salesforce.** Rules are stored as Custom Metadata in your org.
- **Respects security.** The copy is made with the person's own field access and sharing.
- **Three permission sets:** Admin, User and Read Only.
- **In-app Administrator and User guides** in five languages.

Everything included

- ✓ If / Then / Else rules per object
- ✓ Actions: blank, set value, copy field, date, user, text template, protect
- ✓ Rule order decides conflicts
- ✓ Related records copied by your choice
- ✓ Flow action, quick action and Lightning page button
- ✓ Standard Clone button left unchanged
- ✓ Clone log with field-level old and new values
- ✓ Log retention setting
- ✓ Master on/off switch
- ✓ Admin, User and Read Only permission sets
- ✓ In-app guides in five languages

Make your next clone ready to use

Custom Clone is built, tested and documented. Ask for a walk-through with a rule for the object you clone most.