Copy Paste Tool

Installation Guide

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# UPGRADE

## Install package

Use https://workbench.developerforce.com or Migration Tool

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| Ant CopyPasteToolUpload |

# NEW INSTALLATION

## Install package

Use https://workbench.developerforce.com or Migration Tool

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| Ant CopyPasteToolUpload |

## Install example configuration

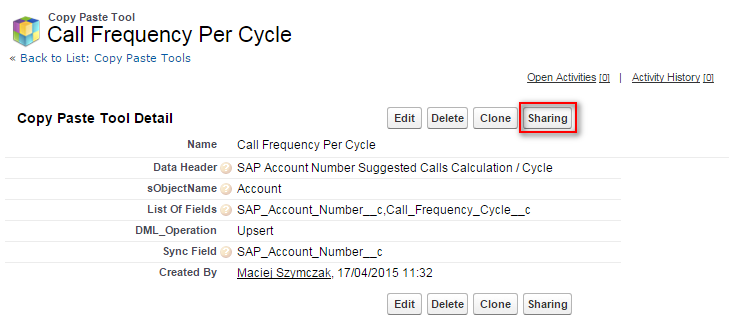
This configuration will help you to move the copy paste tool configuration between enviroments.

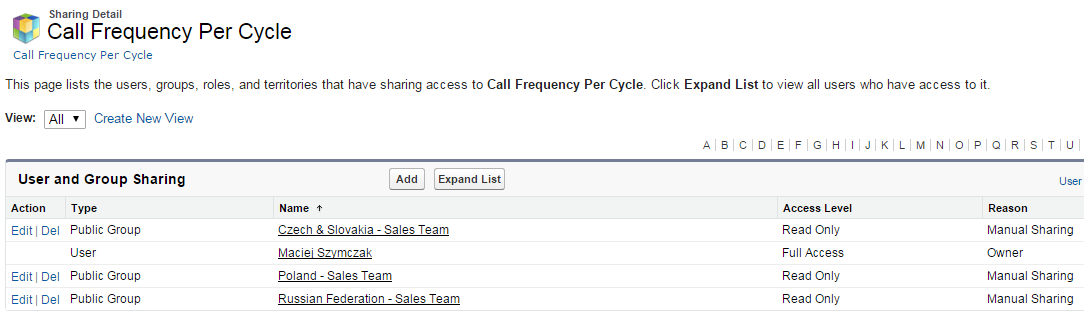
Run this apex code using developer console:

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| Copy\_Paste\_Tool\_\_c cpt **=** New Copy\_Paste\_Tool\_\_c**();**  cpt**.**Name**=**'Copy Paste Tool: Excel Template'**;**  cpt**.**Data\_Header\_\_c**=**'Name~tab~Data\_Header\_\_c~tab~DML\_Operation\_\_c~tab~Insert\_Null\_Values\_\_c~tab~List\_Of\_Fields\_\_c~tab~Max\_Records\_\_c~tab~sObjectName\_\_c~tab~Sync\_Field\_\_c~tab~Where\_Clause\_\_c'**;**  cpt**.**DML\_Operation\_\_c**=**'Upsert'**;**  cpt**.**Insert\_Null\_Values\_\_c**=**TRUE**;**  cpt**.**List\_Of\_Fields\_\_c**=**'Name,Data\_Header\_\_c,DML\_Operation\_\_c,Insert\_Null\_Values\_\_c,List\_Of\_Fields\_\_c,Max\_Records\_\_c,sObjectName\_\_c,Sync\_Field\_\_c,Where\_Clause\_\_c'**;**  cpt**.**Max\_Records\_\_c**=**100000**;**  cpt**.**sObjectName\_\_c**=**'Copy\_Paste\_Tool\_\_c'**;**  cpt**.**Sync\_Field\_\_c**=**'Data\_Header\_\_c'**;**  cpt**.**Where\_Clause\_\_c**=**''**;**  insert cpt**;**  Copy\_Paste\_Tool\_\_c cpt2 **=** New Copy\_Paste\_Tool\_\_c**();**  Cpt2**.**Name**=**'Copy Paste Tool: External Fields'**;**  Cpt2**.**Data\_Header\_\_c**=**'External\_Field\_Name\_\_c~tab~Field\_Name\_\_c~tab~SOQL\_\_c'**;**  Cpt2**.**DML\_Operation\_\_c**=**'Upsert'**;**  Cpt2**.**Insert\_Null\_Values\_\_c**=**TRUE**;**  Cpt2**.**List\_Of\_Fields\_\_c**=**'External\_Field\_Name\_\_c,Field\_Name\_\_c,SOQL\_\_c'**;**  Cpt2**.**Max\_Records\_\_c**=**100000**;**  Cpt2**.**sObjectName\_\_c**=**'CPT\_External\_Field\_\_c'**;**  Cpt2**.**Sync\_Field\_\_c**=**'External\_Field\_Name\_\_c'**;**  Cpt2**.**Where\_Clause\_\_c**=**''**;**  insert cpt2**;** |

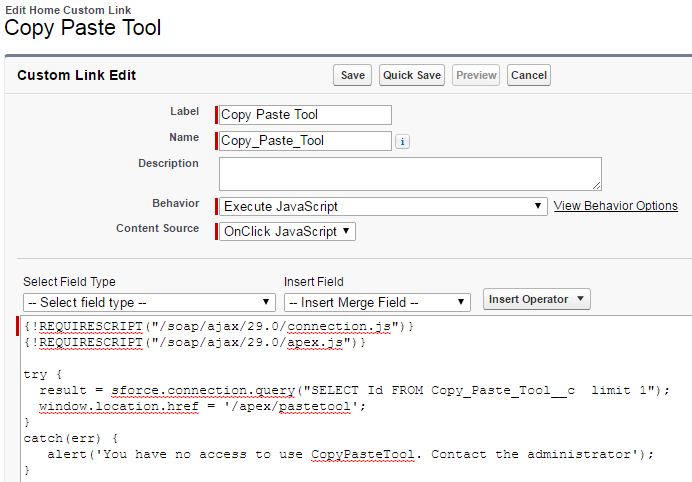
## Setup user access to Copy-Paste Tool

* Add Permission Sets to Users (“Copy Paste Tool User” for regular users and “Copy Paste Tool Admin” for Administrators)
* Share configuration with the users

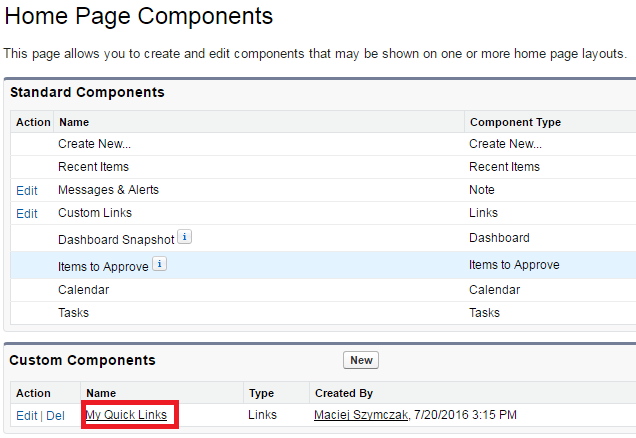


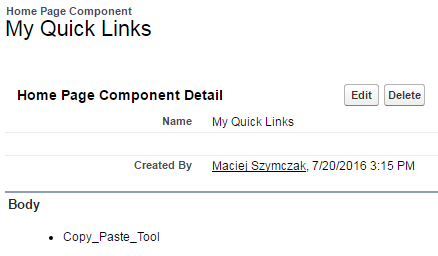


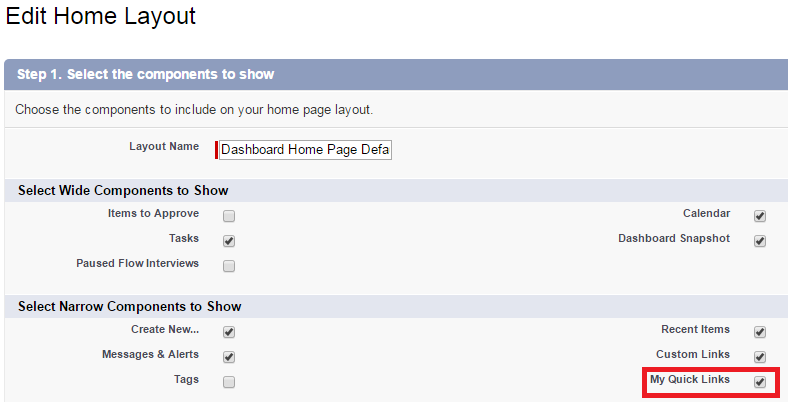
## Add Copy-Paste Tool to Home Tab/Tab



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| {!REQUIRESCRIPT("/soap/ajax/54.0/connection.js")}  {!REQUIRESCRIPT("/soap/ajax/54.0/apex.js")}  try {  result = sforce.connection.query("SELECT Id FROM Copy\_Paste\_Tool\_\_c limit 1");  window.location.href = '/apex/pastetool';  }  catch(err) {  alert('You have no access to use CopyPasteTool. Contact the administrator');  } |







If you don't want expose Copy Paste Tool on Home Page Layout follow below advise:

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| **Create a Visual Force tab:** Setup > Tabs > Visual Force Tab > New > Paste Tool  Share the tab with permission Set. |