



How to Clone Salesforce Objects Across Orgs Seamlessly?

Clone objects in Salesforce between two separate orgs is both essential and complicated for admins. Even slight ignorance across dependencies, field mappings, validation rules, and permissions can break functionality or cause errors in your org.

If you're someone dealing with manual object recreation or error-prone deployments across orgs, you must be familiar with the complexities. This guide will introduce you to a smarter, seamless way to clone Salesforce objects across orgs.

Common Challenges Admins Encounter During Manual Clone Salesforce Objects

Before jumping into the resolution, it's important to understand the shortcomings of manual object cloning-

- **Complex dependencies:** Objects are often linked to fields, relationships, validation rules, and flows, which must be replicated in parallel.
- **Time-consuming process:** Recreating each object component manually is tedious and inefficient.
- **High error risk:** Skipping a single dependency can break the entire setup
- **Inconsistent orgs:** Differences between orgs can lead to unexpected issues.

This is where admins need a smoother and more efficient alternative to manually clone objects in Salesforce.

migSO- The Ultimate Clone Salesforce Objects App

migSO is the leading Salesforce Metadata Management app, empowering admins to clone objects across the same or different orgs. This advanced feature helps you overcome the limitations of manual object cloning and enables you to seamlessly clone Salesforce objects along with relevant fields, relationships, record types, validation rules, and field sets. Admins can simultaneously set object permissions as per their requirements.

Detailed Steps to Clone Objects in Salesforce using migSO

Here are the simple steps the admin needs to follow to clone Salesforce objects across their orgs-

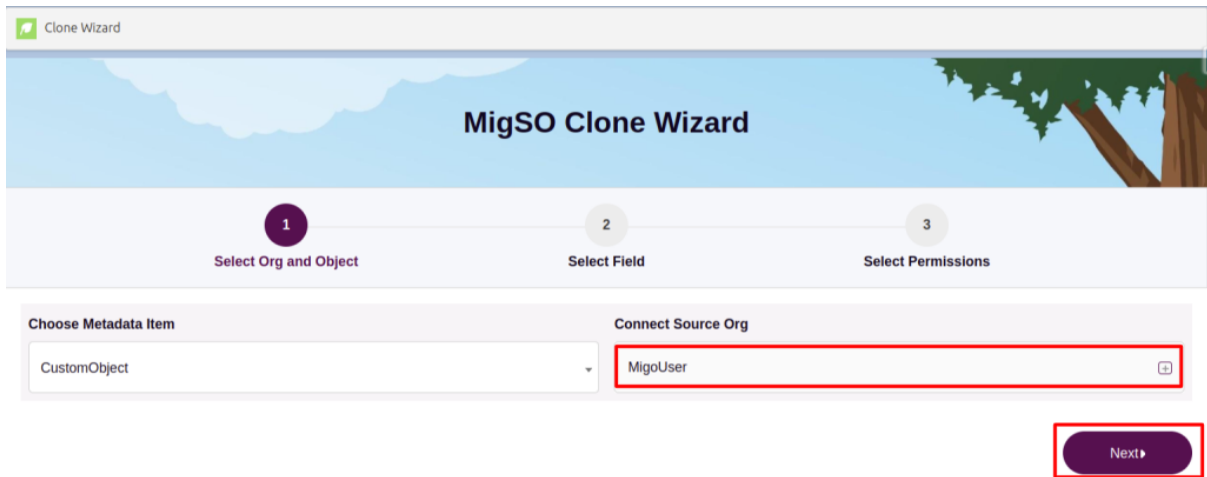
Step 01: Click “App Launcher,” then search for and select migSO.

Step 02: Now click the migSO “Clone Wizard” menu.



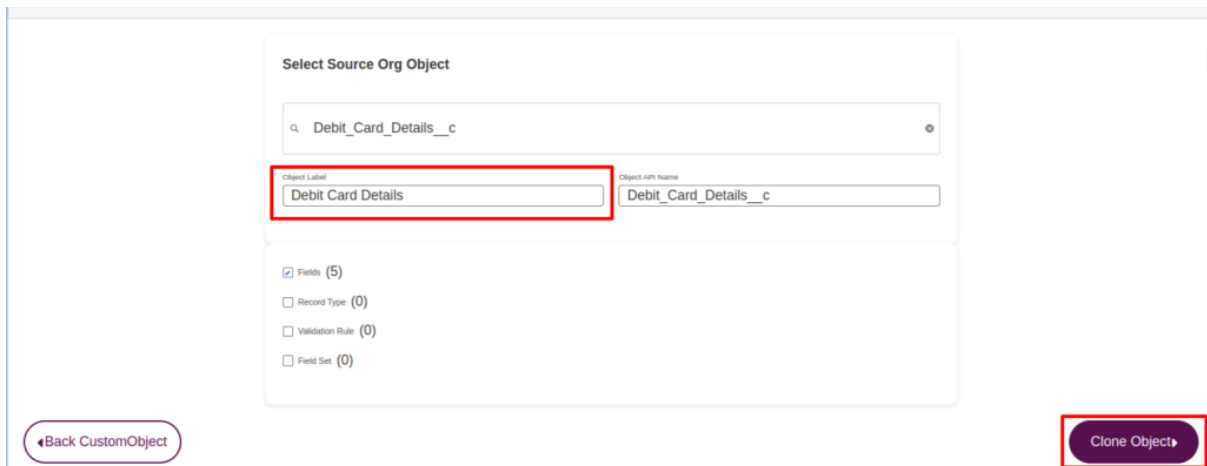
The screenshot shows the 'MigSO Clone Wizard' interface. At the top, there's a header with the 'Clone Wizard' logo and the title 'MigSO Clone Wizard'. Below the header, there's a progress bar with three steps: 1. Select Org and Object, 2. Select Field, and 3. Select Permissions. Step 1 is currently active. Under Step 1, there are two sections: 'Choose Metadata Item' and 'Connect Source Org'. In the 'Choose Metadata Item' section, a dropdown menu is open, showing 'CustomObject' as the selected item. This dropdown is highlighted with a red rectangle. In the 'Connect Source Org' section, there's a search bar with the placeholder text 'Search...'.

Step 03: Select the metadata item to clone (e.g., Custom Object).



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Step 04: Select the source org or connect a new one. To add a new org, click on the ‘+’ icon, enter details like org name, user name, password, and security, and click on the Save button.



The image shows the 'Select Source Org Object' screen. At the top, there's a search bar with 'Debit_Card_Details__c' entered. Below the search bar, there are two text boxes: 'Object Label' with 'Debit Card Details' and 'Object API Name' with 'Debit_Card_Details__c'. A red box highlights the 'Object Label' text box. Below these, there are four checkboxes: 'Fields (5)' (checked), 'Record Type (0)', 'Validation Rule (0)', and 'Field Set (0)'. At the bottom left, there's a 'Back CustomObject' button. At the bottom right, there's a 'Clone Object' button with a red box around it.

Step 05: Select the custom objects to clone.

Step 06: Edit the Object name by clicking on the Object Label. After this, you can select the fields, validation rule, record type, and field set to deploy. Now, Click Clone Object.

Deployment Status			
Name	Metadata Item	Status	Comment
Object			
Credit_Card__c	Object	✓	True
Fields			
Credit_Card__c.CVV_Number__c	Fields	✓	True
Credit_Card__c.Card_Details__c	Fields	✓	True
Credit_Card__c.Card_Number__c	Fields	✓	True
Credit_Card__c.Expiry_Date_MM_YY__c	Fields	✓	True
Credit_Card__c.Holder_Name__c	Fields	✓	True

Set Up The Field Permission

Step 07: Review the deployment status and click Set Up the Field Permission.

MigSO

Home

Manage Wizard

Clone Wizard

Export Wizard

Setting

Modify Permissions

No, I will set them later

Read All	Edit All	Profiles	CVV_Number__c		Card_Details__c		Card_Number__c		Expiry_Date_M...		Holder_Name__c	
			Read	Edit	Read	Edit	Read	Edit	Read	Edit	Read	Edit
☒	☒	Admin	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒
☒	☒	Analytics Cloud Integration User	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒
☒	☒	Analytics Cloud Security User	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒
☒	☒	Authenticated Website	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒
☒	☒	B2B Reordering Portal Buyer Profile	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒
☒	☒	Chatter External User	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒
☒	☒	Chatter Free User	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒
☒	☒	Chatter Moderator User	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒

Deploy Permissions

Deploy Permissions

Step 08: You can now set permissions or choose to do it later. If now, choose permissions for each profile and click Deploy Permissions.

MigSO

Home

Manage Wizard

Clone Wizard

Export Wizard

Setting

MigSO Clone Wizard

1

Select Org and Object

2

Select Field

3

Select Permissions

Congratulations! you have completed this cloning wizard.

Matadata Item Name	Total Count	Success Count	Failed Count
Fields	5	5	0

Download Report

Restart The Migration Wizard

Download Report

Restart The Migration Wizard

Step 09: Review the deployment status, download the report, or restart the wizard.

Woohoo! You have successfully deployed custom objects from one org to another.

Conclusion

It seems that clone objects in Salesforce across orgs doesn't have to be complicated after all. With migSO, admins can turn the tedious default process into a quick, seamless one. Get ready to clone Salesforce objects along with relevant permissions, fields, relationships, page layouts, record types, validation rules, and flows.

Who Are We?

Tech9logy Creators is a Registered Salesforce Consulting and ISV Partner Company with over 10 years of experience. We have a certified team of developers with extensive knowledge about Salesforce AppExchange and provide you with the best-in-class personalized apps. Our dedicated Salesforce experts help you bring the best out of your CRM and ensure your business operates at its highest potential. **Contact us** for more information.

Read More:

<https://migso.io/our-blog/features-benefits/how-to-clone-salesforce-objects-across-orgs-seamlessly/>