



White Paper

Click2Undo - White Paper

Aim:

Click2Undo is a productivity app that helps you restore the data on a single click. Be it the last change that you'd want to restore, the changes that were done in the past which you would like to get back or maybe a record that was deleted by mistake, Click2Undo can do it without any hassle.

Features:

- Undo the changes done to a Dynamics 365 record and restore it to the last known state in a single click
- Restore the changes done to a record in the past by using History Restore functionality
- Undo changes done on multiple records in one go in a single click
- Restore deleted Dynamics 365 records
- Supports OOB as well as Custom Entities

Supported Versions

Versions: Microsoft Dynamics 365 8.2 & above, Power Apps and CDS

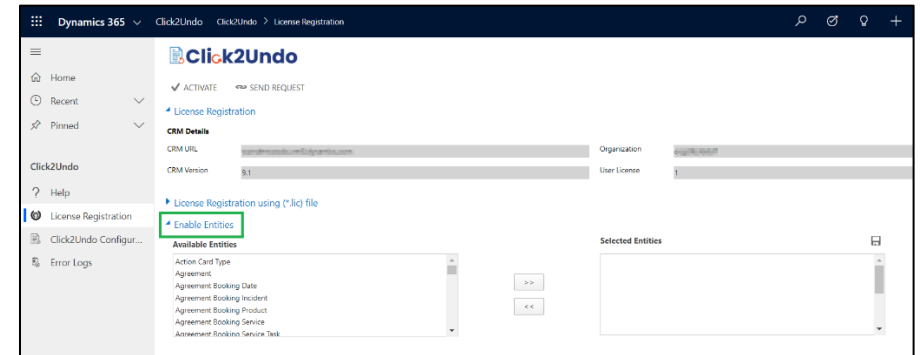
Deployment Models: On-Premises and Online

Who needs it?

To err is human. Often Dynamics 365 users find themselves in situations where they have entered incorrect information or deleted records by mistake. Click2Undo enables users to undo changes made to the records whether it is recent or in the past and restore deleted records to its original state. This provides a safety net within which they can conduct day-to-day activities without any hassle. It ensures easy restoration of data for all those entities for which auditing has been enabled. Thus, Dynamics 365 users find these features very helpful in dealing with mistakes and errors arising out of human negligence or technical malfunctions.

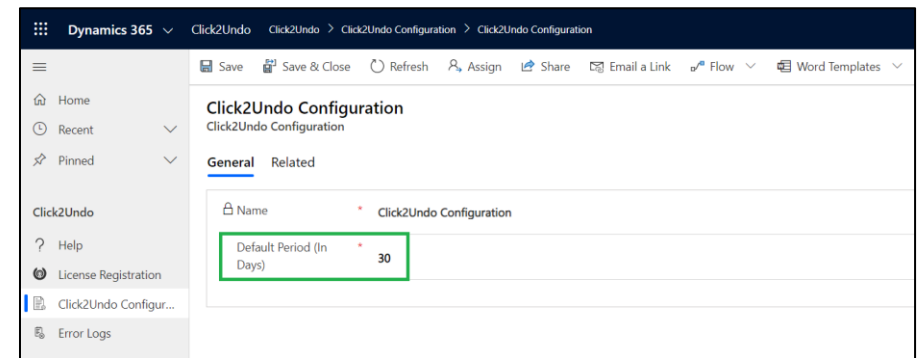
Enable Entities

Select and enable Entities with ease for Click2Undo solution from License Registration Page.



Click2Undo Configuration

Set default period for which number of records on History and Restore Deleted grids will be displayed on click of History and Restore Deleted button.



Click2Undo Button

Restore the last changes done to a Dynamics 365 record (i.e. restore last changed fields whose auditing is enabled).

Click2Undo - White Paper

This screenshot shows the account page for 'White Tree Inc.' with the 'Click2Undo' button highlighted in the top navigation bar. The account information includes:

- Account Name: White Tree Inc.
- Phone: 555 25689
- Fax: 555 25667
- Website: https://www.whitetree.com
- Parent Account: A Datum Corporation

The timeline shows an 'Auto-post on White Tree Inc.' dated 4/9/2020.

This screenshot shows the same account page, but with the 'Phone' field (555 25666) and 'Parent Account' (Adventure Works) highlighted in green boxes, indicating they have been updated.

History

Displays list of fields changed in past whose auditing is enabled and restore the changes done at one go.

This screenshot shows the account page with the 'History' button highlighted in the top navigation bar.

The 'History' table displays a list of field changes. The table has columns for Start Date, End Date, Field Name, Old Value, New Value, Modified On, and Modified By. The table is filtered by 'All Fields'.

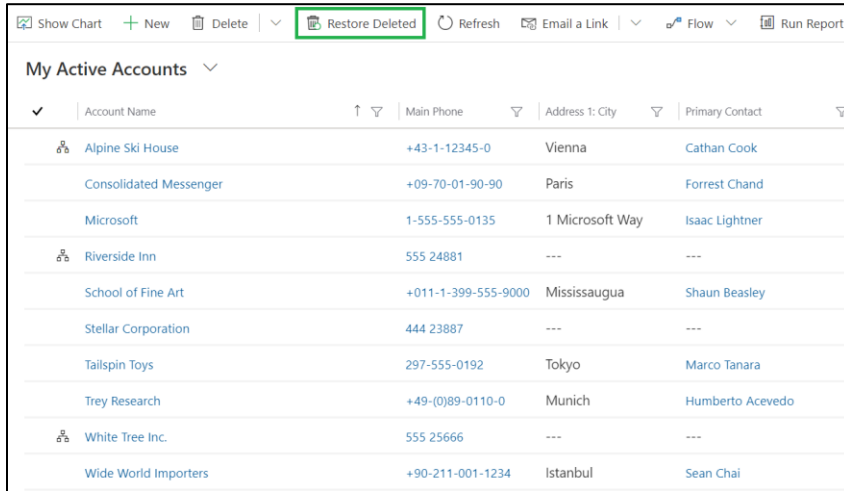
Start Date	End Date	Field Name	Old Value	New Value	Modified On	Modified By	
4/22/2020	5/22/2020	Search					All Fields
5/19/2020 4:27 PM							
		Account Name	Green Apple Savings	Green Apple Investments	5/19/2020 4:...	Sam P	
<input checked="" type="checkbox"/>		Fax	255 6699	255 6688	5/19/2020 4:...	Sam P	
5/19/2020 4:25 PM							
		Main Phone	255 6677	255 667701	5/19/2020 4:...	Sam P	
5/19/2020 4:25 PM							
		Main Phone	255 667701	255 6677	5/19/2020 4:...	Sam P	
5/19/2020 4:12 PM							
<input checked="" type="checkbox"/>		Main Phone	255 6677	255 667701	5/19/2020 4:...	Sam P	

Page 1 of 11. **Undo**

Click2Undo - White Paper

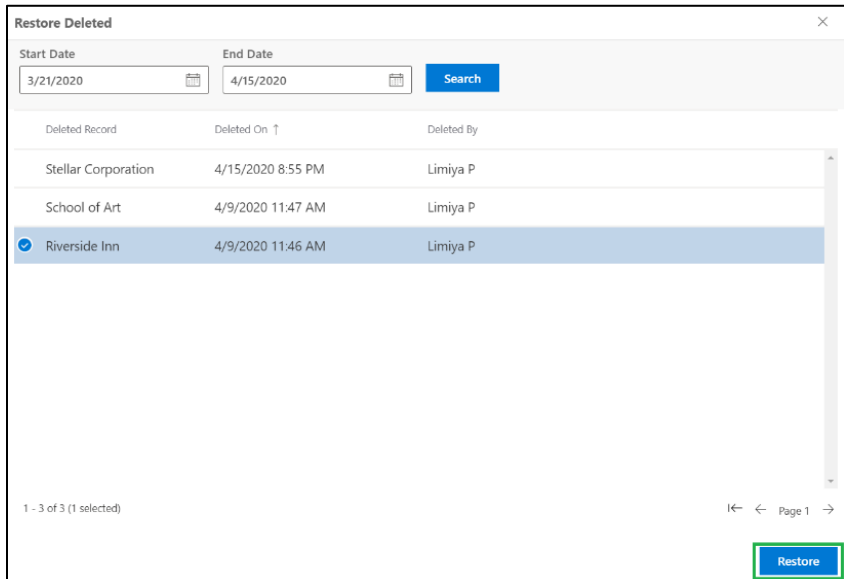
Restore Deleted

Restore deleted records with fields whose auditing is enabled in your Dynamics 365 CRM environment to its previous state with default status.



The screenshot shows the 'My Active Accounts' list in Dynamics 365. The 'Restore Deleted' button in the top toolbar is highlighted with a green box. The table below lists several accounts with their details.

Account Name	Main Phone	Address 1: City	Primary Contact
Alpine Ski House	+43-1-12345-0	Vienna	Cathan Cook
Consolidated Messenger	+09-70-01-90-90	Paris	Forrest Chand
Microsoft	1-555-555-0135	1 Microsoft Way	Isaac Lightner
Riverside Inn	555 24881	---	---
School of Fine Art	+011-1-399-555-9000	Mississauga	Shaun Beasley
Stellar Corporation	444 23887	---	---
Tails핀 Toys	297-555-0192	Tokyo	Marco Tanara
Trey Research	+49-(0)89-0110-0	Munich	Humberto Acevedo
White Tree Inc.	555 25666	---	---
Wide World Importers	+90-211-001-1234	Istanbul	Sean Chai

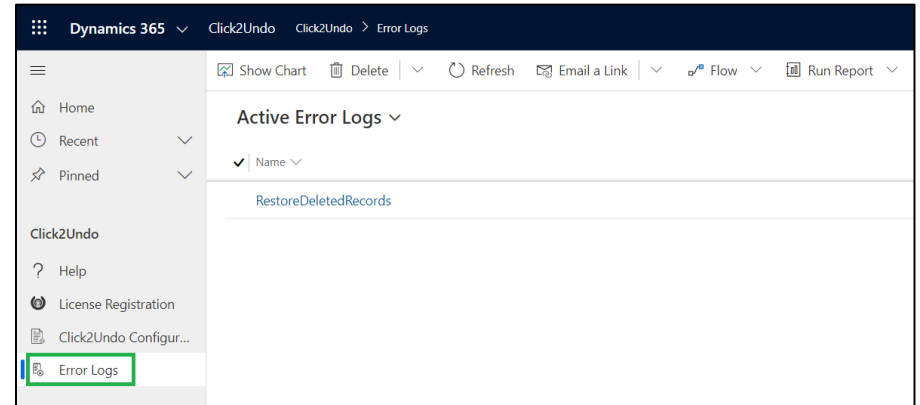


The screenshot shows the 'Restore Deleted' dialog box. It includes search filters for 'Start Date' (3/21/2020) and 'End Date' (4/15/2020). A table lists deleted records, with 'Riverside Inn' selected. A 'Restore' button is highlighted at the bottom right.

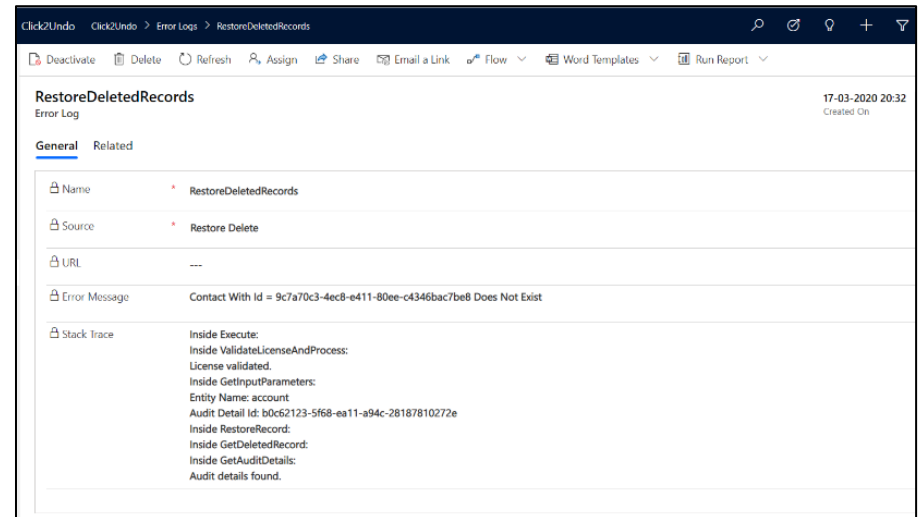
Deleted Record	Deleted On ↑	Deleted By
Stellar Corporation	4/15/2020 8:55 PM	Limiyi P
School of Art	4/9/2020 11:47 AM	Limiyi P
<input checked="" type="checkbox"/> Riverside Inn	4/9/2020 11:46 AM	Limiyi P

Error Log

View Error log for details of failed 'undo' and 'restore deleted' process.



The screenshot shows the 'Active Error Logs' section in Dynamics 365. The 'Error Logs' button in the left navigation pane is highlighted with a green box. The error log entry 'RestoreDeletedRecords' is visible.



The screenshot shows the details of the 'RestoreDeletedRecords' error log. The error message is 'Contact With Id = 9c7a70c3-4ec8-e411-80ee-c4346bac7be8 Does Not Exist'. The stack trace shows the execution path from 'Inside Execute' to 'Audit details found'.

```
Stack Trace:
Inside Execute:
Inside ValidateLicenseAndProcess:
License validated.
Inside GetInputParameters:
Entity Name: account
Audit Detail Id: b0c62123-5f68-ea11-a94c-28187810272e
Inside RestoreRecord:
Inside GetDeletedRecord:
Inside GetAuditDetails:
Audit details found.
```

Contact Us:

INOGIC (MUMBAI - INDIA)

M/S. INOGIC TECH (INDIA) PVT. LTD.

A/301, Everest Nivara InfoTech Park,
TTC Industrial Area, MIDC, Turbhe,
Navi Mumbai, Maharashtra – 400 705.

INDIA

E-mail: crm@inogic.com

Skype: [crm@inogic.com](https://www.skype.com/people/inogic)

Twitter: @inogic