Click2Undo

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User Manual

Content

Introduction

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.

Salient 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

Available for: Microsoft Dynamics 365 8.2 & above, Power Apps and CDS
**Deployment:** On-Premises and Online

Prerequisites

Organization Level Auditing

Click2Undo leverages Audit log in order to understand the changes that needs to be restored because of which it is of utmost important to enable Organization Level Auditing, without which you cannot enable Entity Level Auditing.
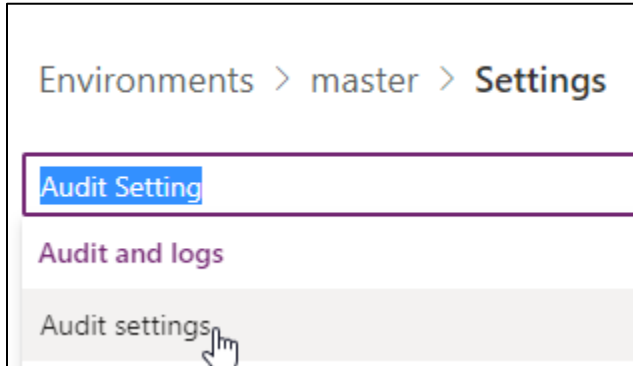
Below are the steps that needs to be undertaken in order to enable Organization Level Auditing:

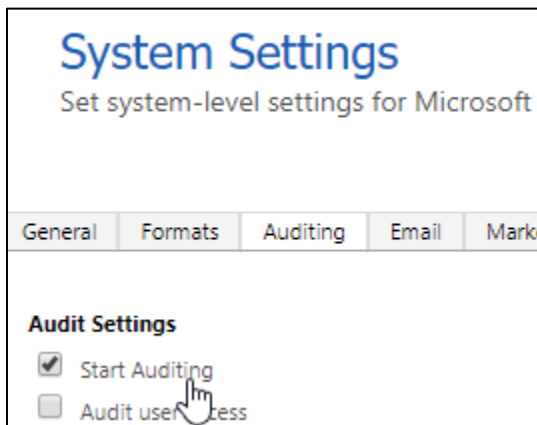Step 1: Open https://admin.powerplatform.microsoft.com/environments

Step 2: Open Settings by selecting the correct environment
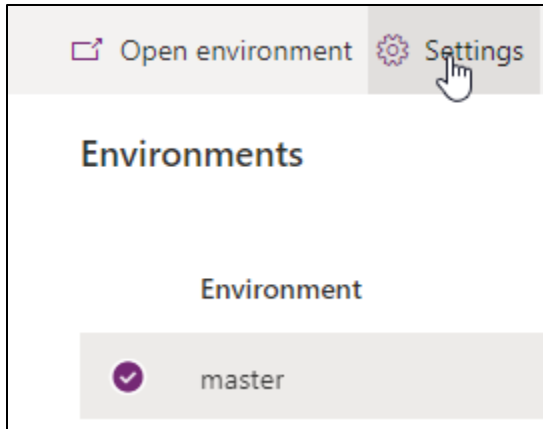
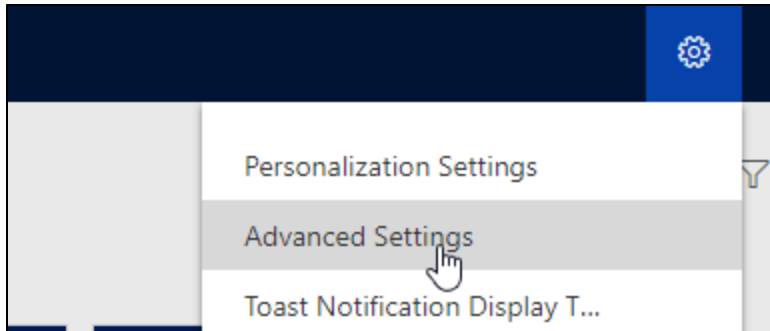Step 3: Search for Audit Setting and Open It
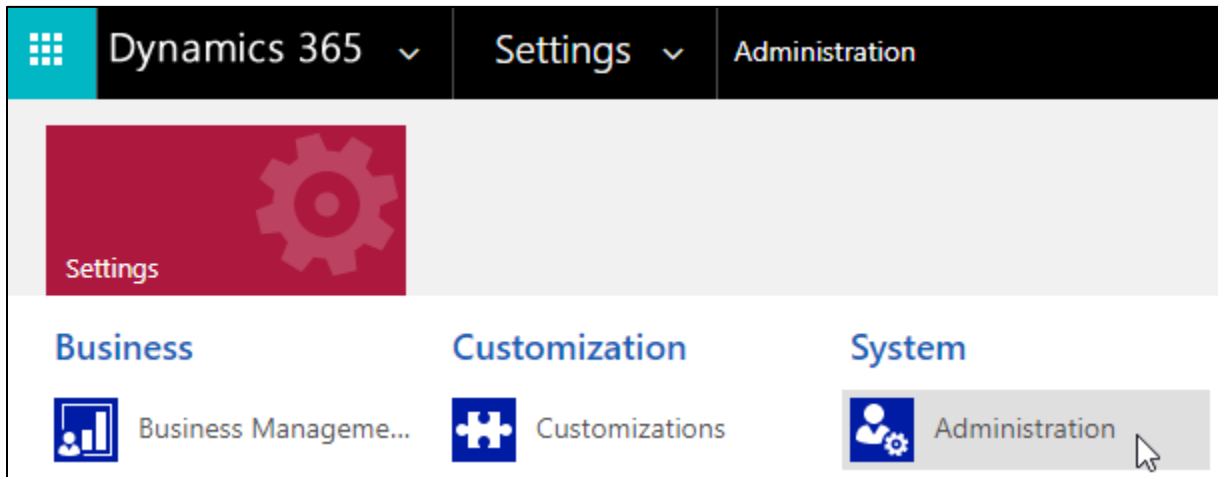

Step 4: Click Start Auditing and then Hit OK

Alternate approach for enabling Organization Level Auditing
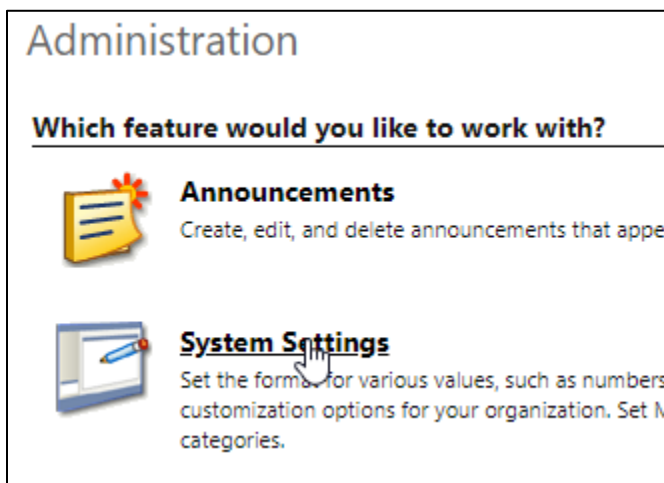
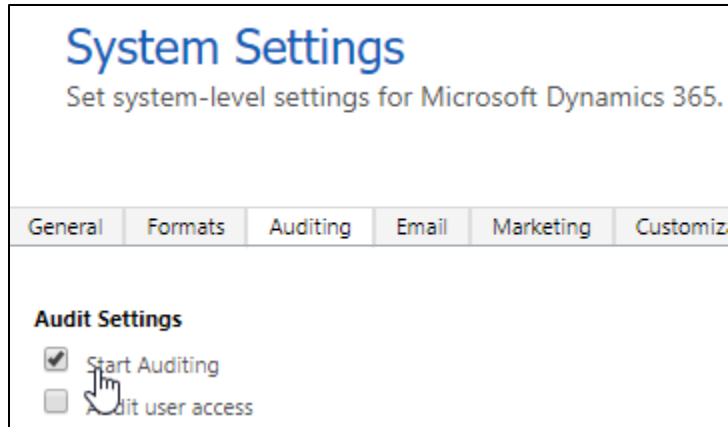Step 1: Click on Advanced Settings in Dynamics 365 CRM

Step 2: Click on Administration

Step 3: Open System Settings

Step 4: On the Auditing Tab, click Start Auditing and then hit OK

Entity Level Auditing

After enabling Organization Level Auditing, the next important step is to enable Entity Level Auditing.

For all the entities that needs to be leveraging Click2Undo feature you need to follow below steps in order to enable Entity Level Auditing.
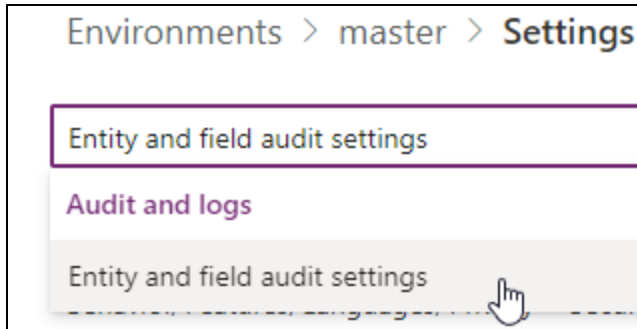
(**Note:** *The below illustration is done using Account entity, but the same process can be followed for the other system or custom entities as well.*)

Step 1: Open https://admin.powerplatform.microsoft.com/environments
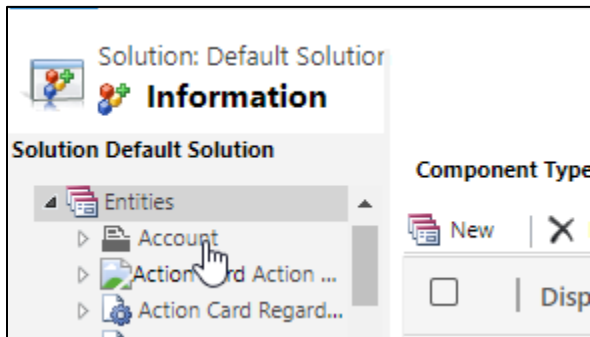
Step 2: Open Settings by selecting the correct environment
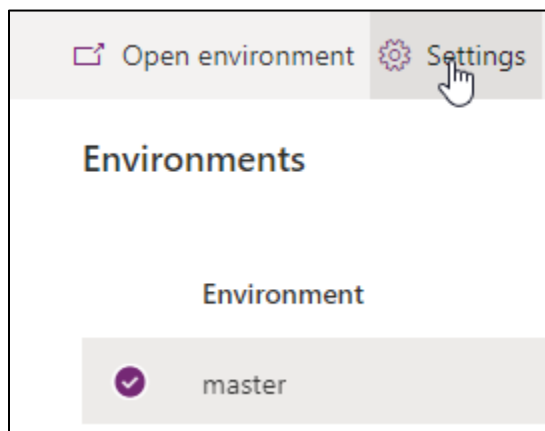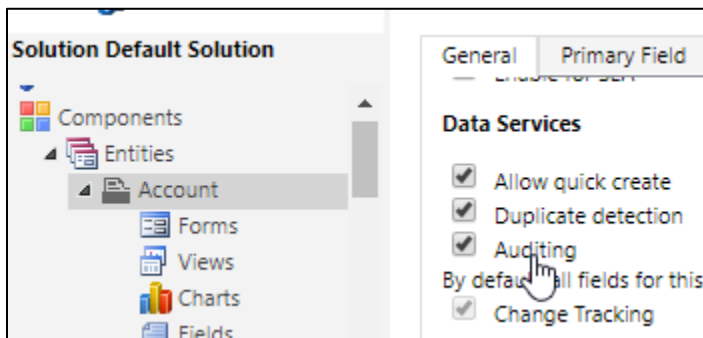

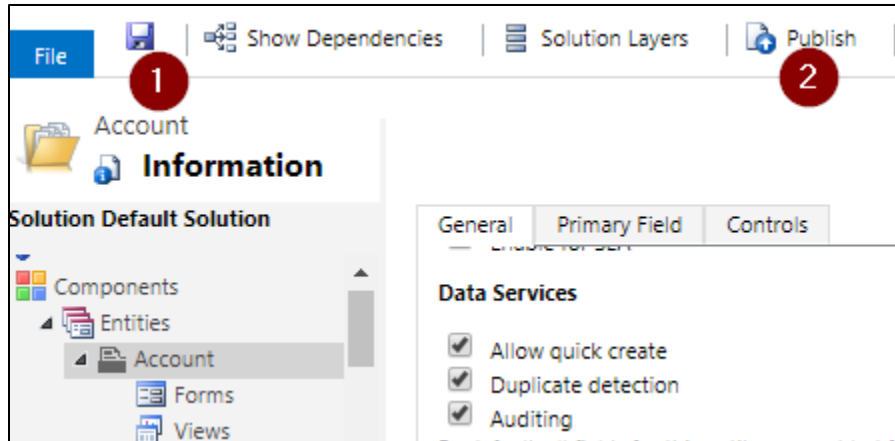Step 3: Search for Entity and field audit Settings

Step 4: It opens the Default Solution

Step 5: Expand Entities and then click on Account, after that enable Auditing

Step 6: Save and Publish

Note: *By default, all fields for the selected entity are enabled for auditing.*
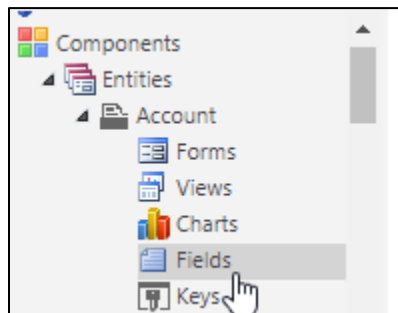
Disable/Enable Auditing Specific Field

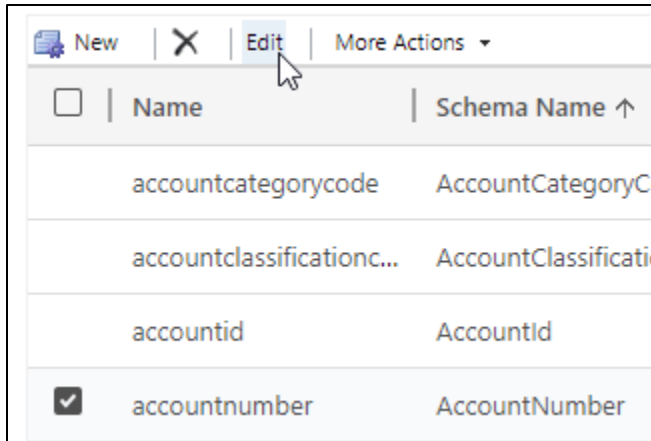By default, Auditing is enabled for all the fields for the enabled entity.

If you want, you can pick and choose which fields should be enabled/disabled for Auditing.

To achieve this, follow the steps given below:
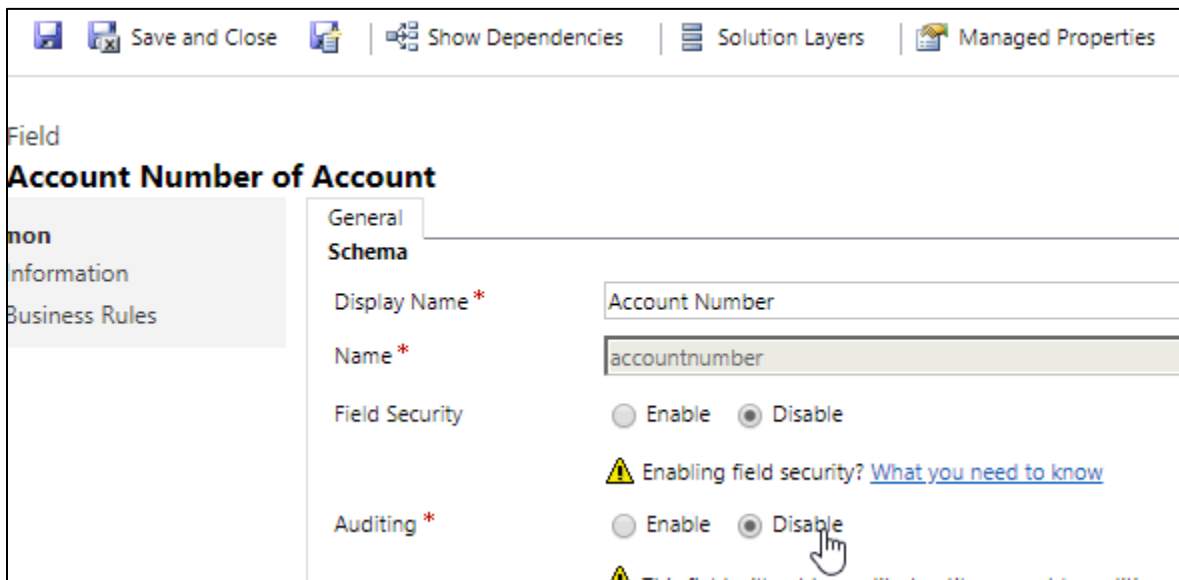
Step 1: Select Fields Tab

Step 2: Select the field for which you would like to disable the auditing and click Edit

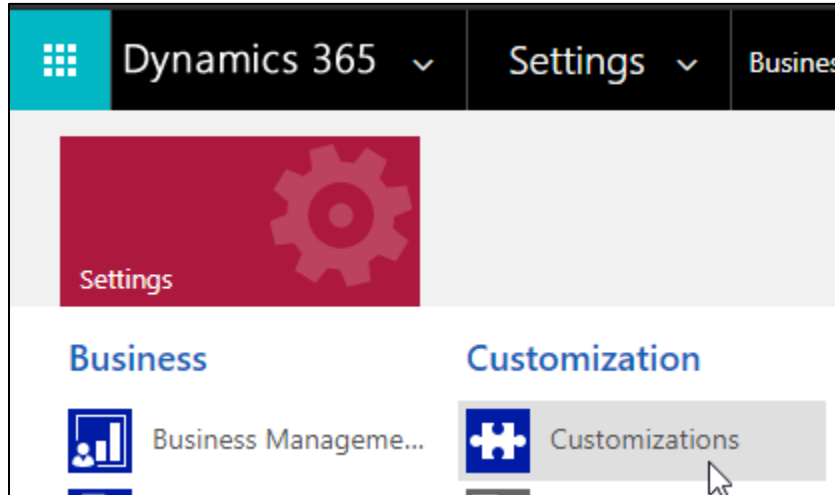Step 3: Select Disable and then hit Save and Close

Step 4: Publish the customizations

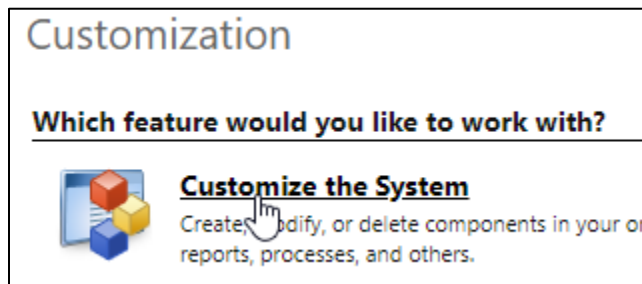**Alternate approach for enabling Entity Level Auditing**

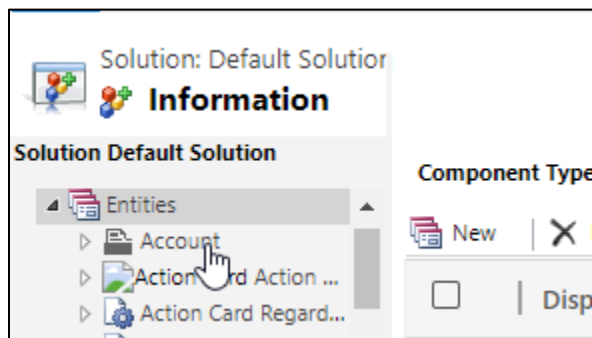Step 1: Click on Advanced Settings from within Dynamics 365 CRM
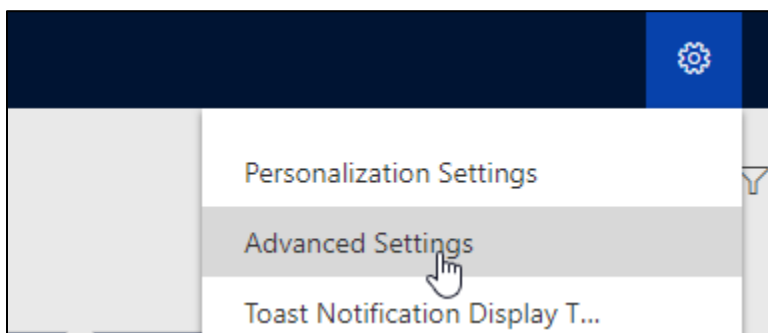
Step 2: Click on Customizations

Step 3: Click on Customize the System

Step 4: It opens the Default Solution

Rest other steps are similar to the above approach.

Entity Configuration

In order to undo the last change, restore deleted records it is necessary to enable Entities for Click2Undo solution. Then only you can make use of Click2Undo features.

1. To Enable Entities navigate to **Click2Undo** App → **License Registration** → **Enable Entities.**
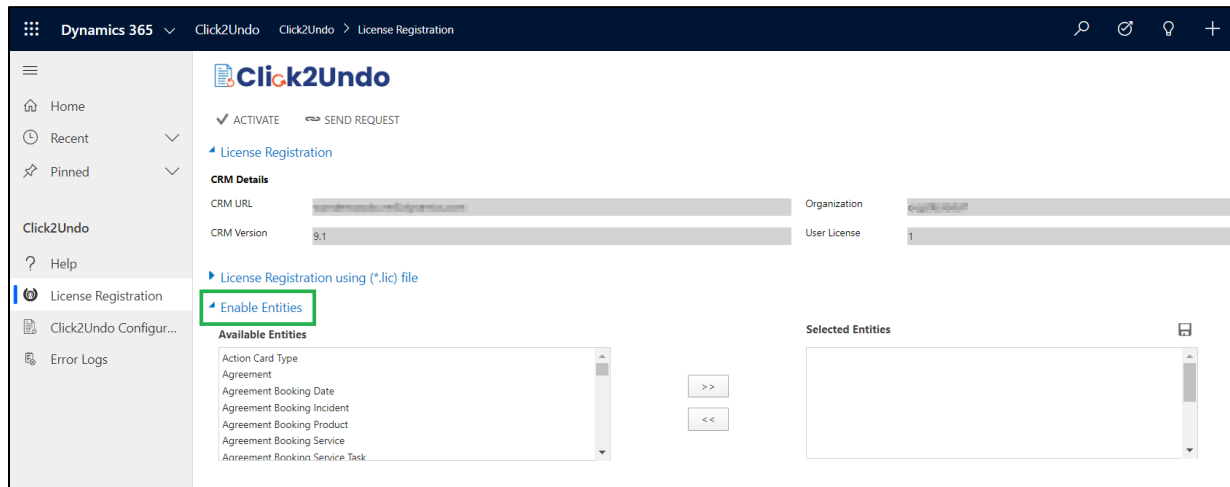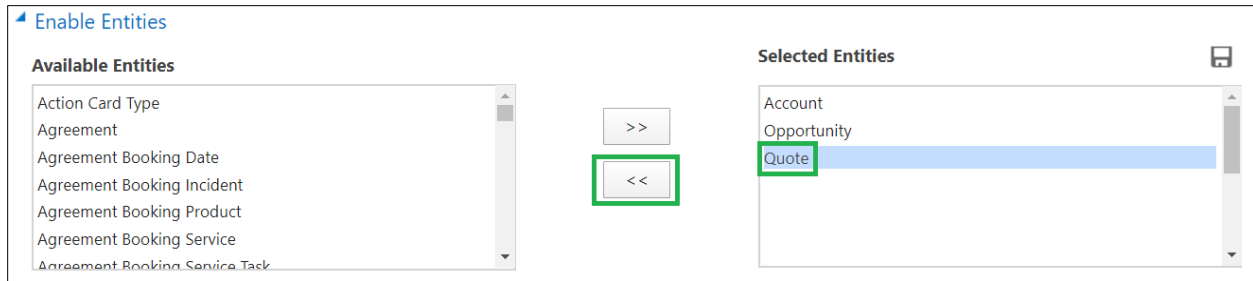

2. You can select the entities from the list of **Available Entities** and move them to the **Selected Entities.**

3. Click on **Save** button to Enable Entities for Click2Undo solution.

4. Now you can also disable Entities any time as per your need by removing the particular entity from **Selected Entities** list.

5. Here, you can see that Quote has been removed from **Selected Entities** list and is now again available in **Available Entities** list.

Click2Undo Configuration

Once the Entities have been enabled, go to **Click2Undo→Click2Undo Configuration**. Here, you can see the Click2Undo Configuration details. In this, one of the fields **'Default Period'** is set at 30 days. This field is used to show default data on History and Restore Deleted grids. It defines how many records should be displayed as by default on click of History and Restore Deleted button. If Period is 30 then these grids shows data of last 30 days. This helps to easily identify and select all those actions that needs to be undone or restored to its former state effortlessly. You can update the numeric value of this field (i.e. 5, 10, 28, 36) depending upon your business requirement.
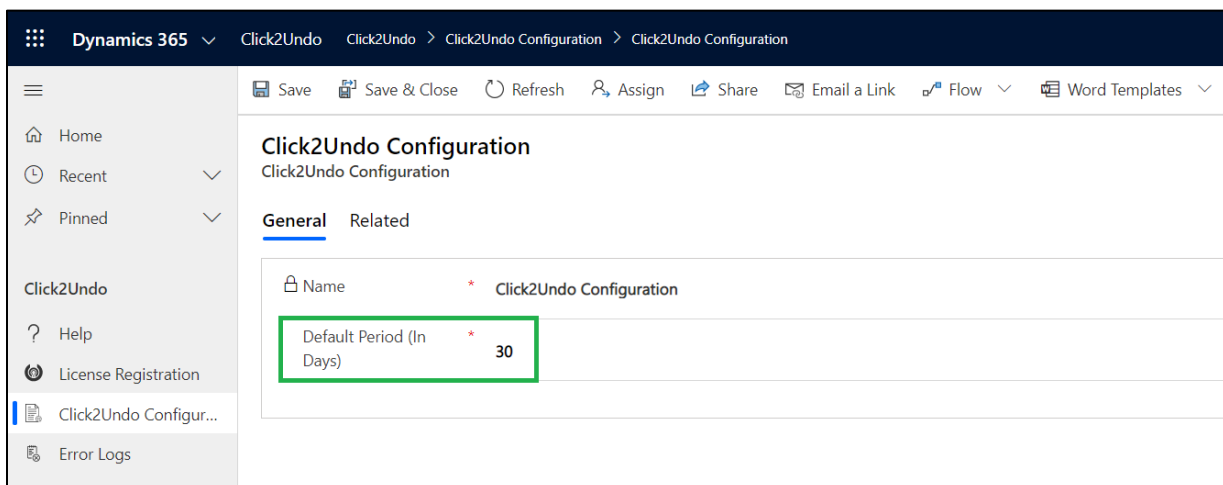
Features

Click2Undo solution provides you with 3 specific features. They are:-

1. **Click2Undo:** Restore the last changes done to a Dynamics 365 record (i.e. restore last changed fields whose auditing is enabled)
2. **History**: Displays list of fields changed in past whose auditing is enabled and restore the changes done
3. **Restore Deleted:** Restore deleted records with fields whose auditing is enabled

Click2Undo

There are times when you enter incorrect data in the fields by mistake. This often leads to knee-jerk reaction to press **cntrl+z** and undo it instantly. This feature of Click2Undo solution will enable you to undo the last changes made to the Dynamics 365 CRM record whose auditing is enabled just with a single click.

For example, in the following account it is found that the phone number and parent account is updated incorrectly.
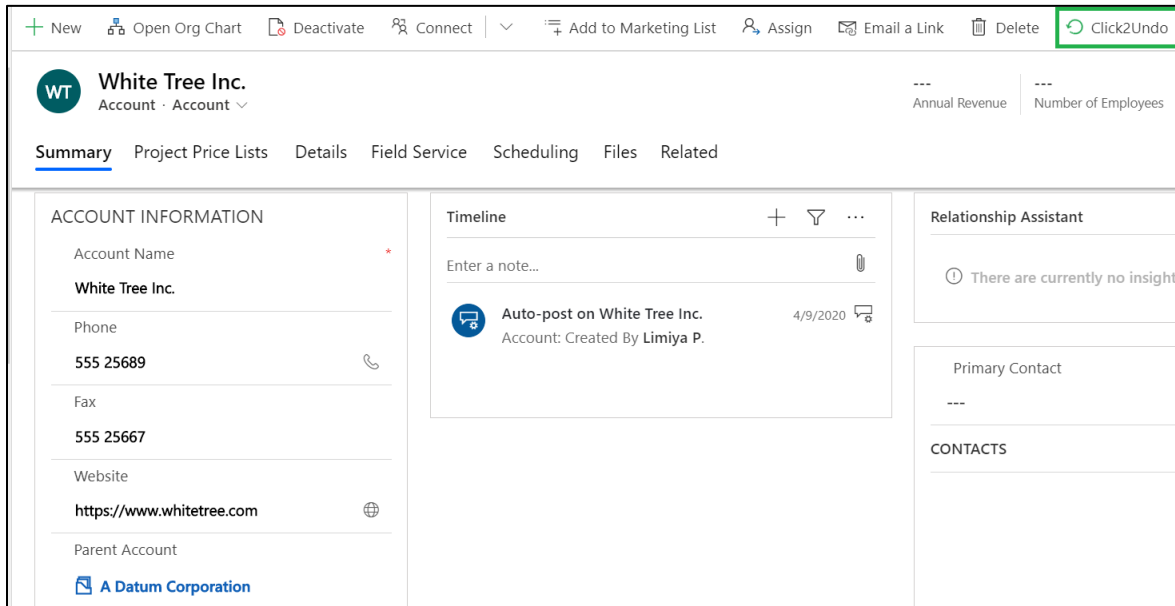
Now, click on the Click2Undo button.

Once you click on the **'Click2Undo'** button, it will undo the last changes done in the record. In this case, both the fields are restored to their previous state which was populated with correct information.

History

While Click2Undo button restores only last changes done to the record, the 'History' button displays list of fields changed in past whose auditing is enabled. From this list you can select one or multiple actions which you want to undo.

For example, let's look into the 'White Tree Inc.' record in Account entity:

Click on the downward arrow near Click2Undo→Click on History.

You will get the list of fields changed in the past whose auditing is enabled.

History

	Start Date	End Date		Filter By
	3/26/2020	4/20/2020	Search	All Fields

	Field Name	Old Value	New Value	Modified On ↑
	Parent Account	---	Adventure Works	4/15/2020 8:41 …
⌄	**4/15/2020 8:40 PM**			
	Fax	555 25667	---	4/15/2020 8:40 …
⌄	**4/15/2020 8:20 PM**			
	Parent Account	Adventure Works	---	4/15/2020 8:20 …
⌄	**4/15/2020 6:51 PM**			
	Website	https://www.whitetre…	https://www.whitetree.com	4/15/2020 6:51 …
	Fax	555 256678	555 25667	4/15/2020 6:51 …

1 - 23 of 23 (0 selected)

Further you can filter these changes based on date or fields.

Now, select the changes you want to undo and click on the 'Undo' button.

All those changes are undone and the record is restored to its previous state.
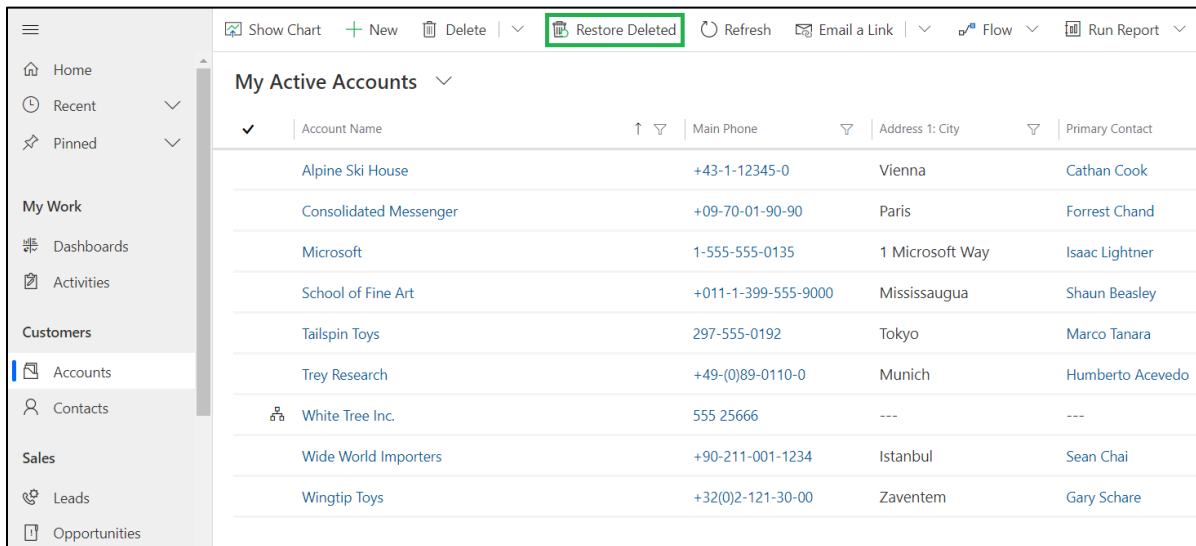
Restore Deleted

Sometimes, it happens that you may delete a record by mistake and find that there is no way to restore it. In such situations, this feature allows you to restore deleted records with fields whose auditing is enabled.

Note: 'Restore Deleted' button is only visible to user with Click2Undo Administrator role.

For example, go to 'Account' entity for which 'Auditing' is enabled and click on 'Restore Deleted' button.

Here, you will get details of all the deleted records which you can further filter by date.

Now, select the record and click on the 'Restore' button.

Now you can see that it has restored the deleted record to its previous state with default status. i.e. if you want to restore deleted record which was Published then it will restore it in Draft state.

	Account Name	↑ ⧩	Main Phone	⧩	Address 1: City	⧩	Primary Contact
	My Active Accounts ⌄						
✓							
⊹	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		Mississaugua		Shaun Beasley
	Tailspin 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
	Wingtip Toys		+32(0)2-121-30-00		Zaventem		Gary Schare

Note: Similarly, you can select multiple records and restore all those deleted records at once.

Restore Deleted ✕

Start Date	End Date	
3/21/2020 📅	4/15/2020 📅	**Search**

| ●	Deleted Record	Deleted On ↑	Deleted By
●	Stellar Corporation	4/15/2020 8:55 PM	Limiya P
●	School of Art	4/9/2020 11:47 AM	Limiya P
●	Riverside Inn	4/9/2020 11:46 AM	Limiya P

1 - 3 of 3 (3 selected)   ⊣← ← Page 1 →

Restore

Error Logs

This entity contains the log of errors that occur when any of the Click2Undo features fail to complete the undo or restoration process. You can get all the details pertaining to the error from this log. To view the logs go to **Click2Undo App → Error Logs.**
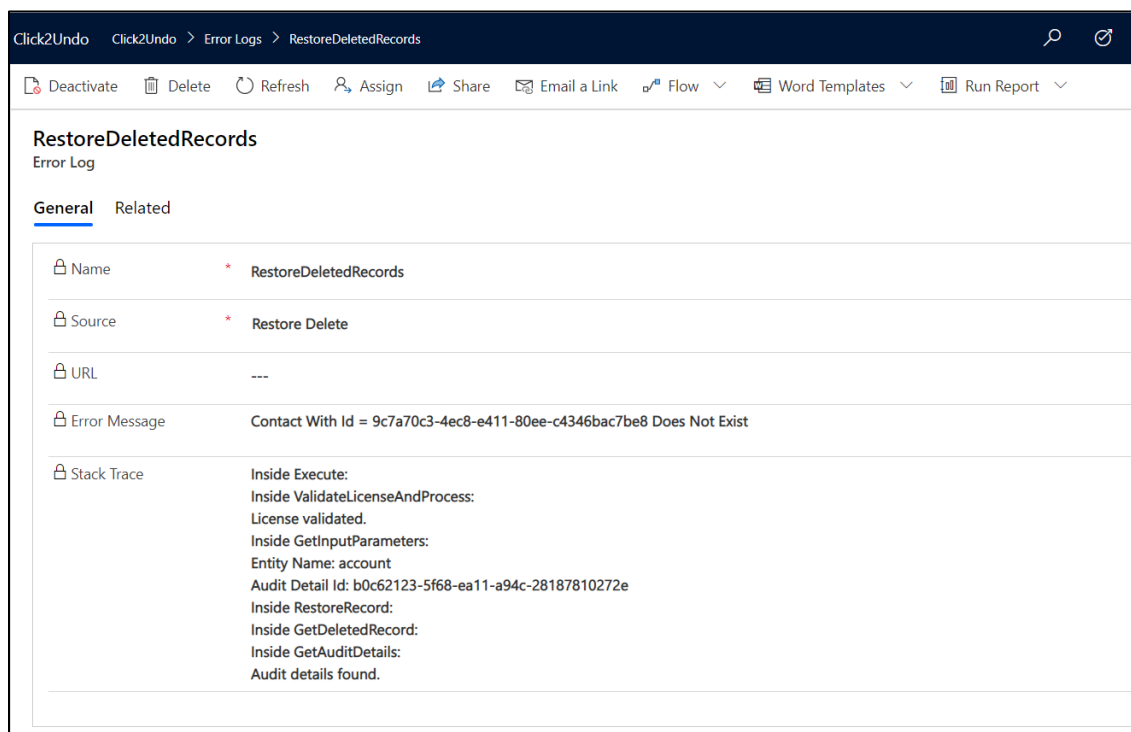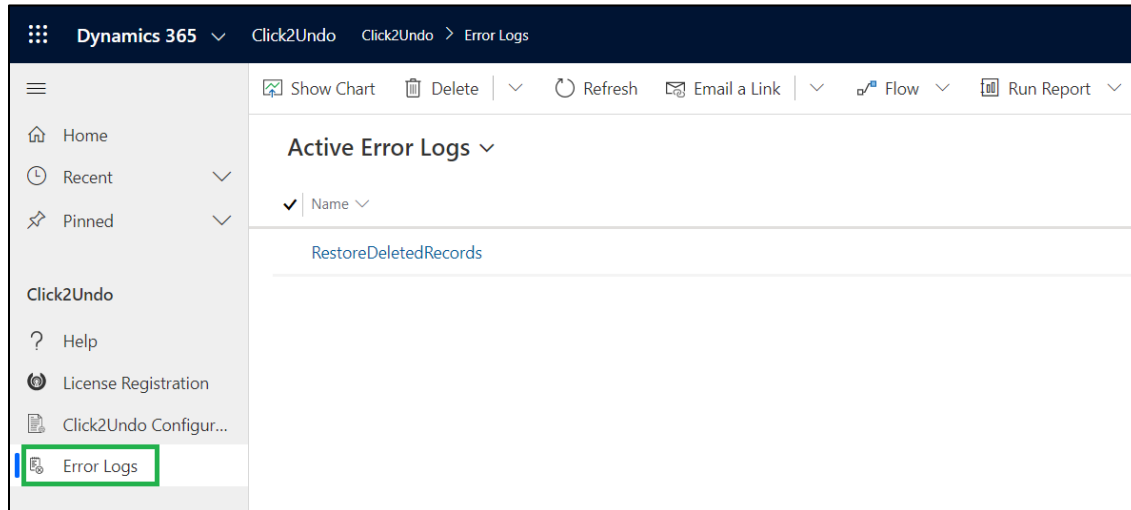
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