



User Manual

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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

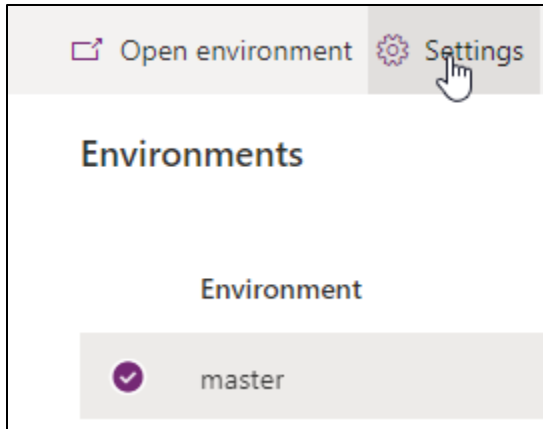
Organization Level Auditing

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.

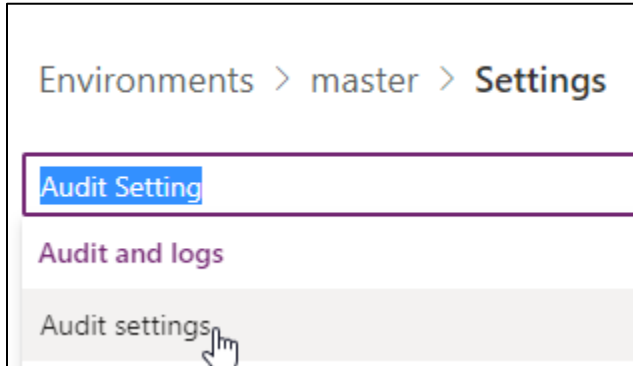
Below are the steps that needs to be undertaken in order to enable Organization Level Auditing:

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

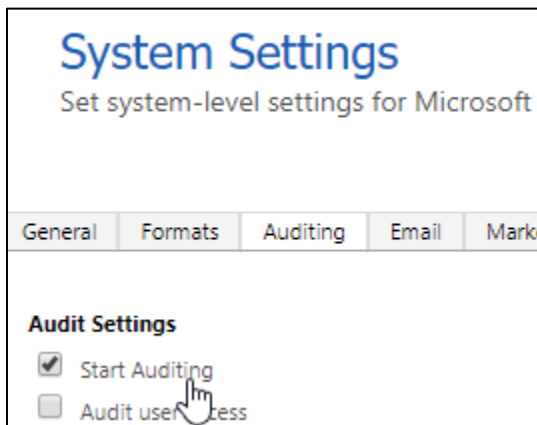
Step 2: Open Settings by selecting the correct environment



Step 3: Search for Audit Setting and Open It

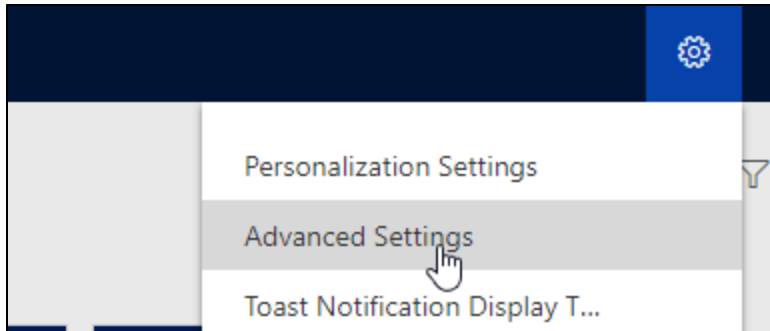


Step 4: Click Start Auditing and then Hit OK

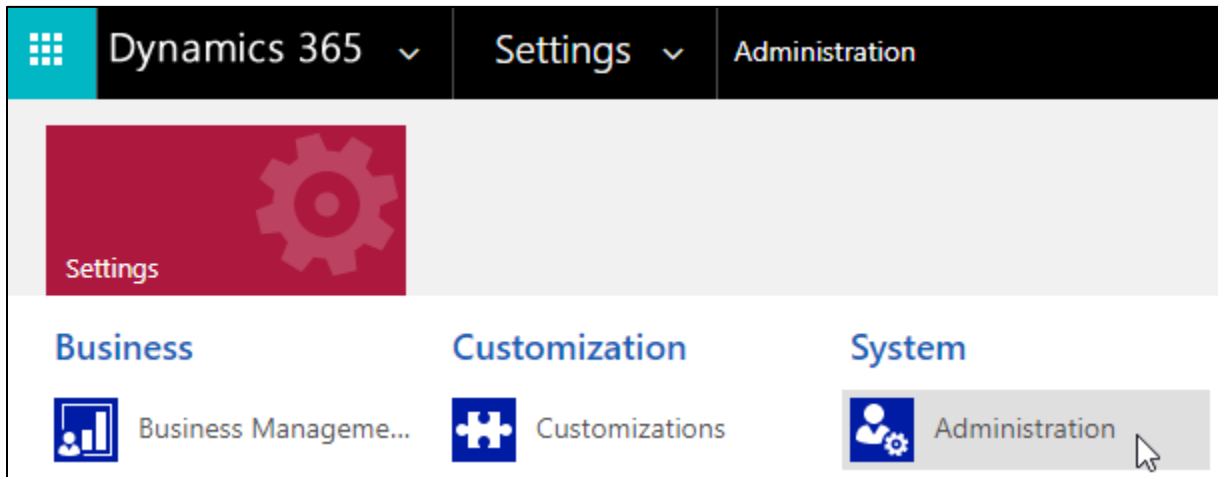


Alternate approach for enabling Organization Level Auditing

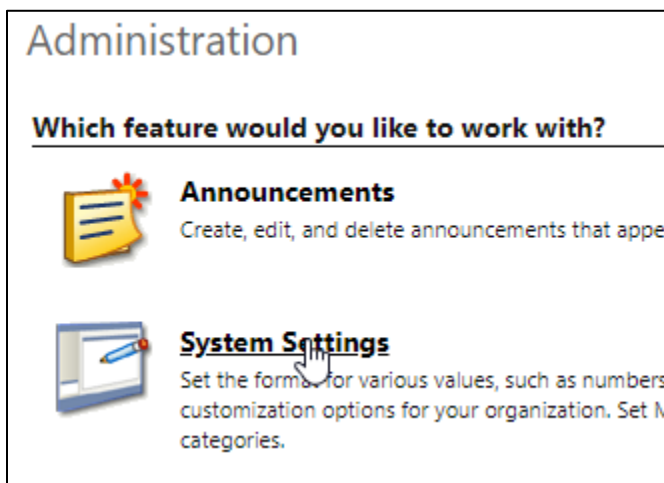
Step 1: Click on Advanced Settings in Dynamics 365 CRM



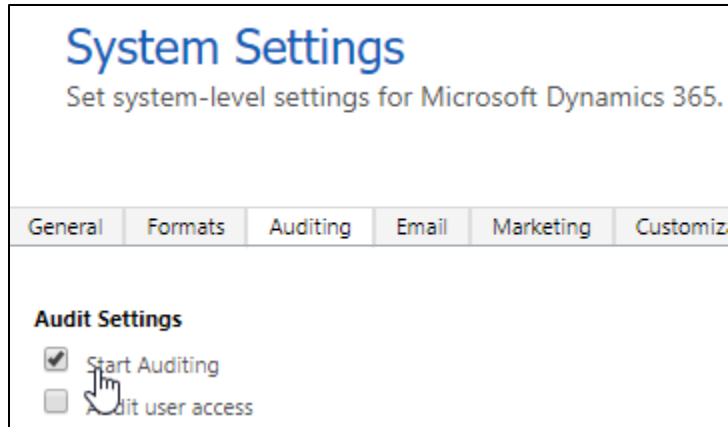
Step 2: Click on Administration



Step 3: Open System Settings



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



Entity Level Auditing

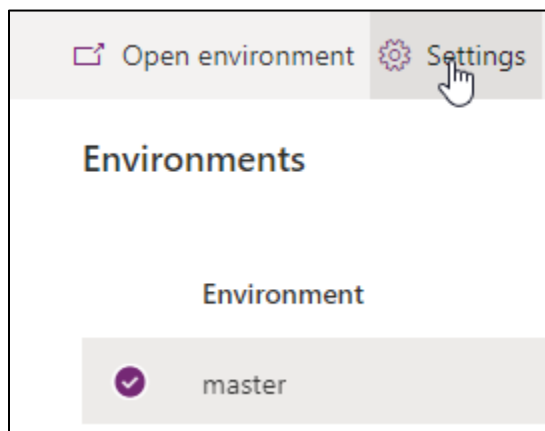
After enabling Organization Level Auditing, the next important step is to enable Entity Level Auditing.

For all the entities that need to be leveraging Click2Undo feature you need to follow below steps in order to enable Entity Level Auditing.

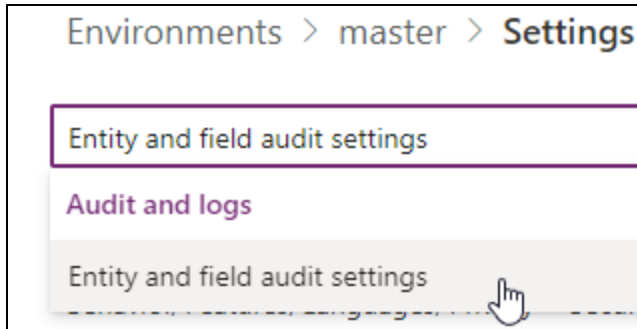
(Note: The below illustration is done using Account entity, but the same process can be followed for the other system or custom entities as well.)

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

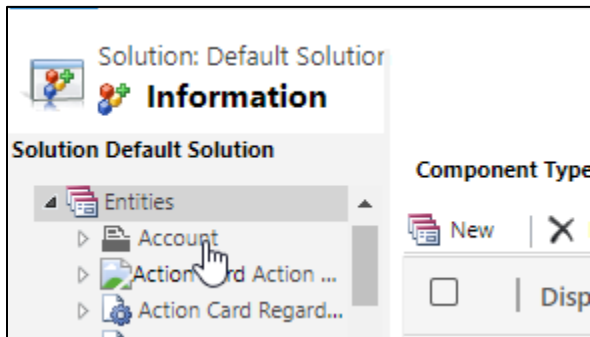
Step 2: Open Settings by selecting the correct environment



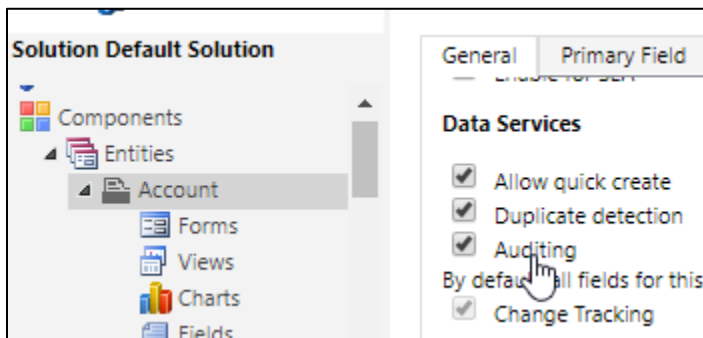
Step 3: Search for Entity and field audit Settings



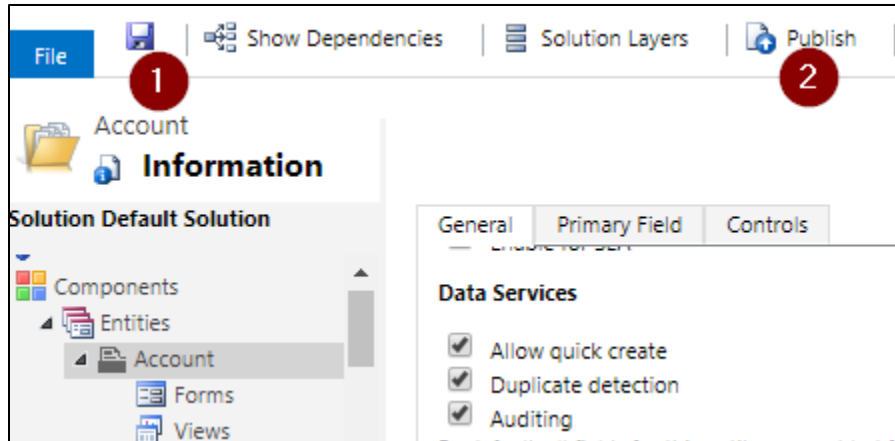
Step 4: It opens the Default Solution



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.

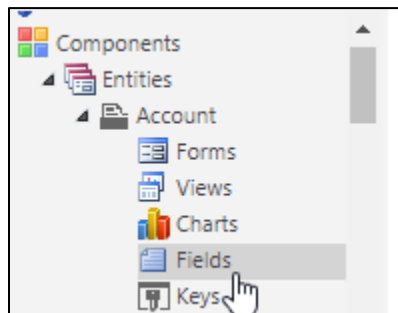
Disable/Enable Auditing Specific Field

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

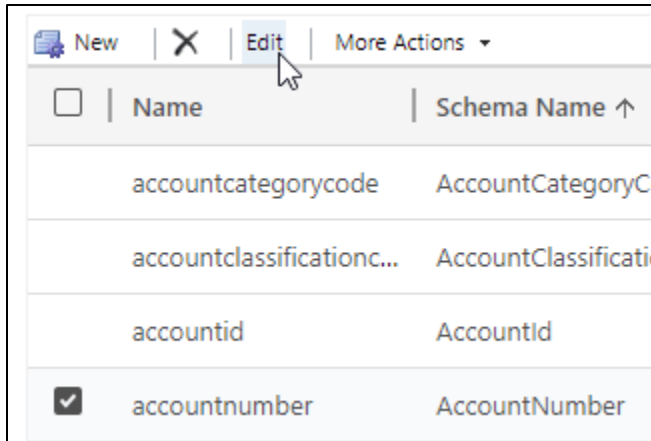
If you want, you can pick and choose which fields should be enabled/disabled for Auditing.

To achieve this, follow the steps given below:

Step 1: Select Fields Tab

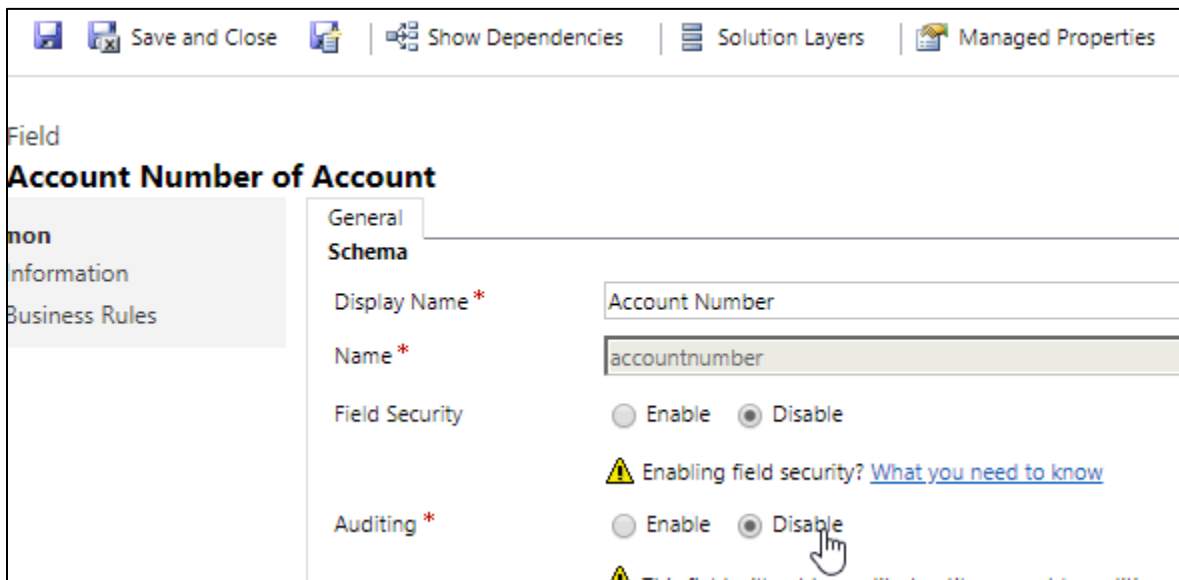


Step 2: Select the field for which you would like to disable the auditing and click Edit



	Name	Schema Name
	accountcategorycode	AccountCategoryCo
	accountclassificationc...	AccountClassificatio
	accountid	AccountId
<input checked="" type="checkbox"/>	accountnumber	AccountNumber

Step 3: Select Disable and then hit Save and Close



Field

Account Number of Account

non

Information

Business Rules

General

Schema

Display Name * Account Number

Name * accountnumber

Field Security ☐ Enable ☒ Disable

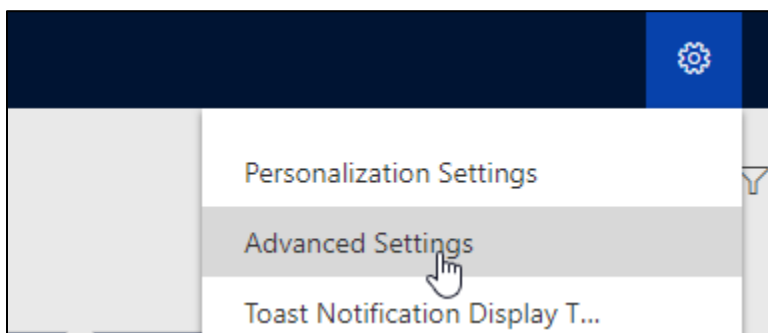
⚠ Enabling field security? [What you need to know](#)

Auditing * ☐ Enable ☒ Disable

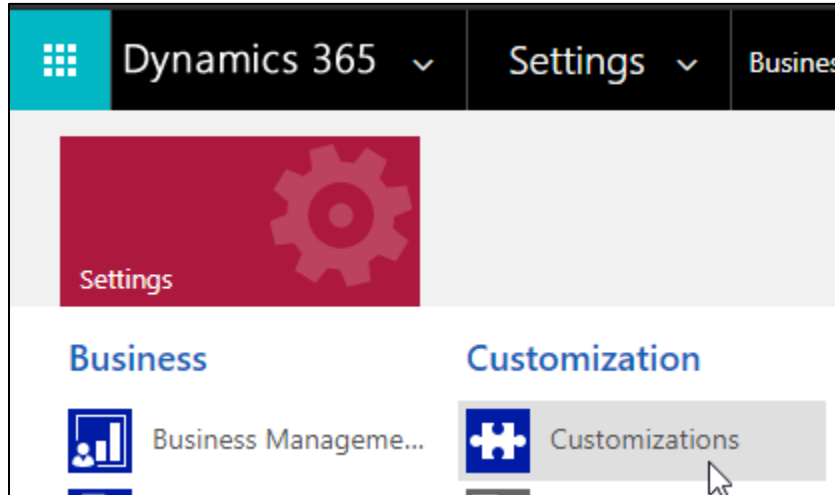
Step 4: Publish the customizations

Alternate approach for enabling Entity Level Auditing

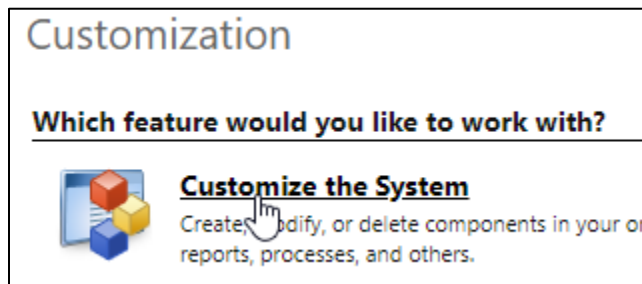
Step 1: Click on Advanced Settings from within Dynamics 365 CRM



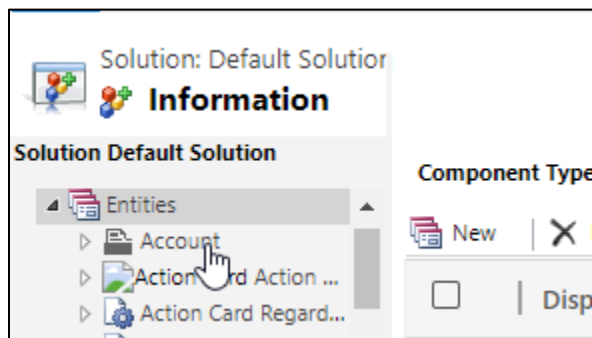
Step 2: Click on Customizations



Step 3: Click on Customize the System



Step 4: It opens the Default Solution

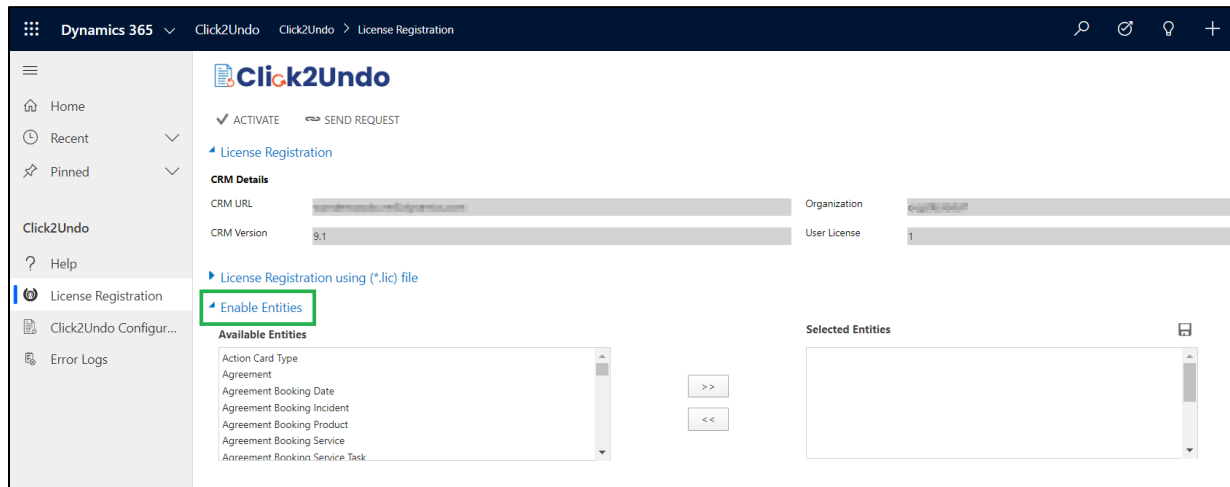


Rest other steps are similar to the above approach.

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**.



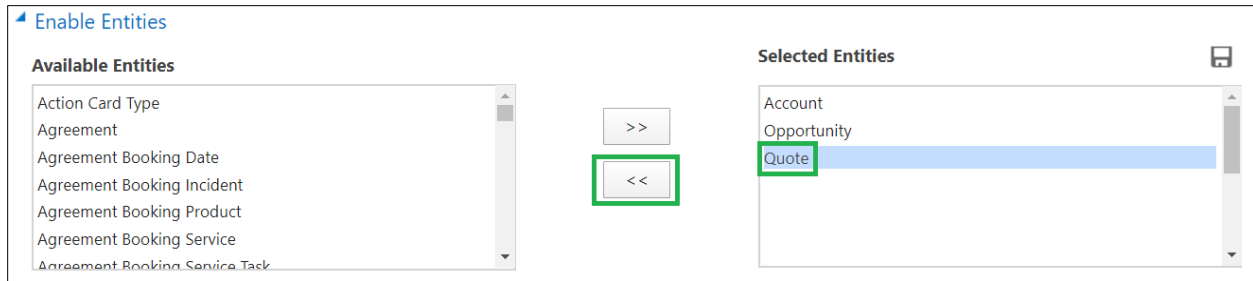
2. You can select the entities from the list of **Available Entities** and move them to the **Selected Entities**.



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.

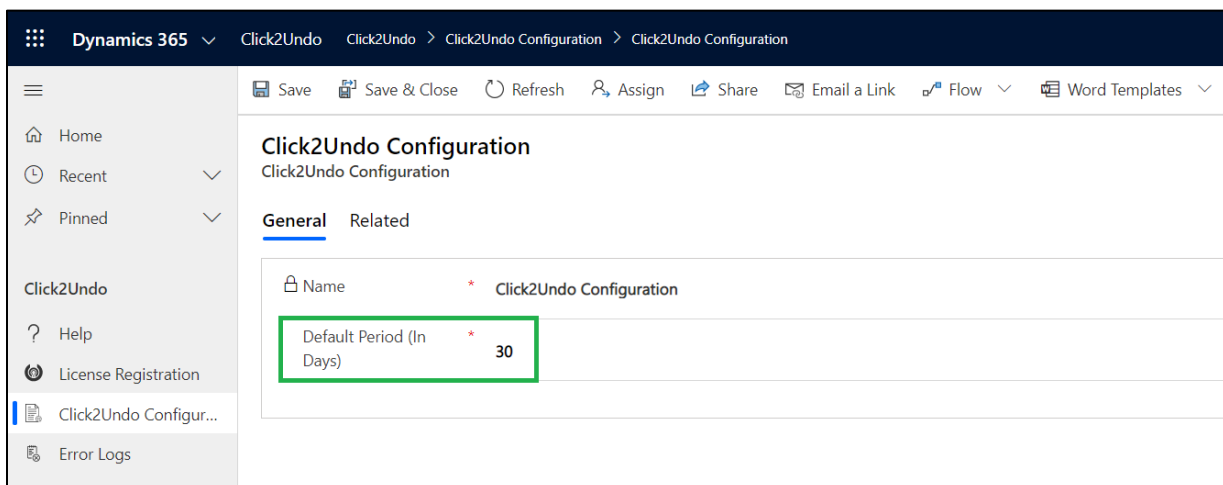


5. Here, you can see that Quote has been removed from **Selected Entities** list and is now again available in **Available Entities** list.



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 **ctrl+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.

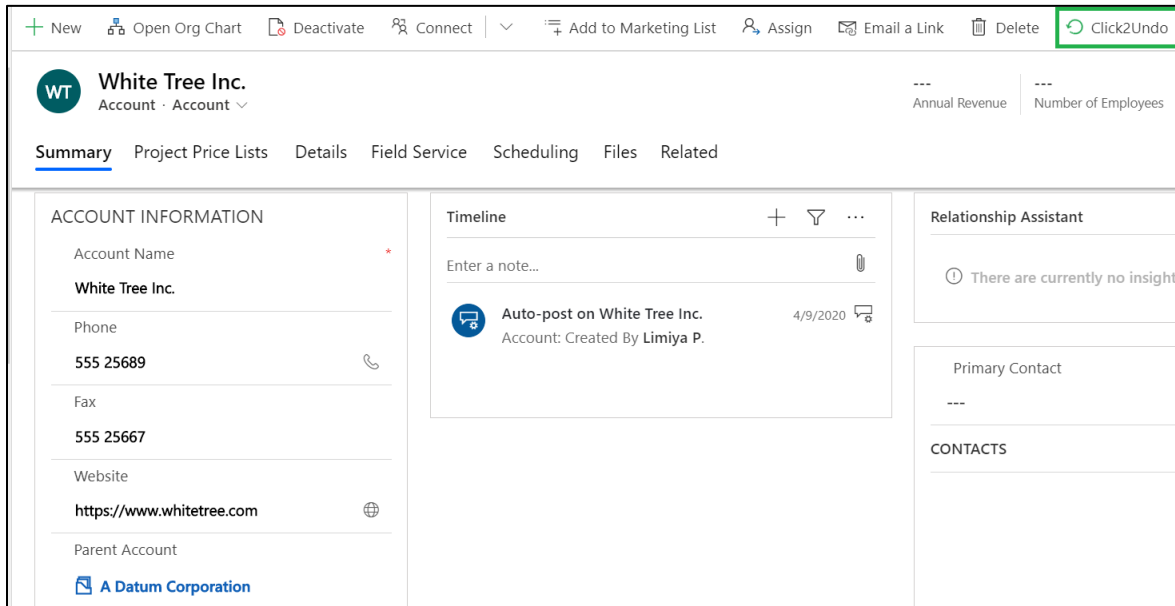
The screenshot displays the 'White Tree Inc.' account record in Dynamics 365. The account name is 'White Tree Inc.'. The 'Phone' field is highlighted with a green box and contains the value '555 25689'. The 'Fax' field contains '555 25667'. The 'Website' field contains 'https://www.whitetree.com'. The 'Parent Account' field is highlighted with a green box and contains 'A Datum Corporation'. The 'Timeline' section on the right shows a note 'Auto-post on White Tree Inc. Account: Created By Limiya P.' dated 4/9/2020.

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

Timeline

- Auto-post on White Tree Inc. Account: Created By Limiya P. 4/9/2020

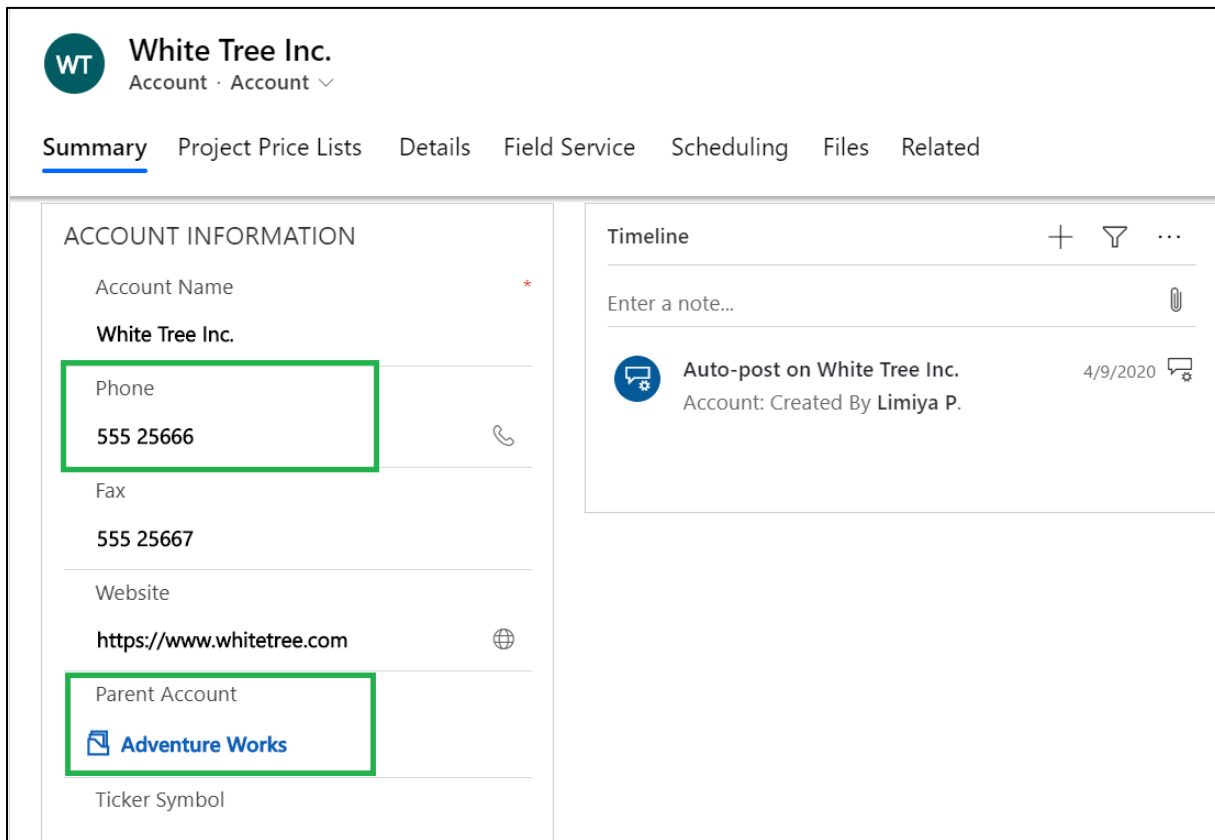
Now, click on the Click2Undo button.



The screenshot shows the top toolbar of the account record page. The 'Click2Undo' button, represented by a circular arrow icon, is highlighted with a green box. Other buttons in the toolbar include 'New', 'Open Org Chart', 'Deactivate', 'Connect', 'Add to Marketing List', 'Assign', 'Email a Link', and 'Delete'.

Below the toolbar, the account record for 'White Tree Inc.' is displayed. The 'Summary' tab is selected. The 'ACCOUNT INFORMATION' section shows the account name 'White Tree Inc.', phone number '555 25689', fax number '555 25667', website 'https://www.whitetree.com', and parent account 'A Datum Corporation'. The 'Timeline' section shows a note 'Auto-post on White Tree Inc. Account: Created By Limiya P.' dated 4/9/2020. The 'Relationship Assistant' section shows 'There are currently no insights'.

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.



The screenshot shows the account record page after clicking the 'Click2Undo' button. The account information has been restored to its previous state. The 'Phone' field now shows '555 25666' and the 'Parent Account' field now shows 'Adventure Works'. Both fields are highlighted with green boxes. The 'Timeline' section shows the same note 'Auto-post on White Tree Inc. Account: Created By Limiya P.' dated 4/9/2020. The 'Relationship Assistant' section shows 'There are currently no insights'.

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:

WT White Tree Inc.
Account · Account ▾

Summary Project Price Lists Details Field Service Scheduling Files Related

ACCOUNT INFORMATION

Account Name * **White Tree Inc.**

Phone **555 25666**

Fax **555 256679**

Website **https://www.white.comm**

Parent Account **Adventure Works**

Ticker Symbol

Timeline + ▾ ...

Enter a note...

Auto-post on White Tree Inc. 4/9/2020
Account: Created By Limiya P.

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

WT White Tree Inc.
Account · Account ▾

Summary Project Price Lists Details Field Service Scheduling Files Related

ACCOUNT INFORMATION

Account Name * **White Tree Inc.**

Phone **555 25666**

Fax **555 256679**

Website **https://www.white.c...**

Parent Account **Adventure Works**

Ticker Symbol

Timeline + ▾ ...

Enter a note...

Auto-post on White Tree Inc. 4/9/2020
Account: Created By Limiya P.

Relationship Assistant



There are currently no relationships.

Primary Contact

CONTACTS

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

Click2Undo – User Manual

History			
Start Date	End Date		Filter By
<input type="text" value="3/26/2020"/> 	<input type="text" value="4/20/2020"/> 	<input type="button" value="Search"/>	<input type="text" value="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.

Click2Undo – User Manual

History

Start Date
3/26/2020

End Date
4/20/2020

Search

Filter By
All Fields
☒ All Fields
☒ Website
☒ Fax
☒ Parent Account
☒ Main Phone

Field Name	Old Value	New Value		
Parent Account	---	Adventure Works		
4/15/2020 8:40 PM				
Fax	555 25667	---	4/15/2020 8:40 ...	Limiya P
4/15/2020 8:20 PM				
Parent Account	Adventure Works	---	4/15/2020 8:20 ...	Limiya P
4/15/2020 6:51 PM				
Website	https://www.whitetre...	https://www.whitetree.com	4/15/2020 6:51 ...	Limiya P
Fax	555 256678	555 25667	4/15/2020 6:51 ...	Limiya P

1 - 23 of 23 (0 selected)

Page 1

Undo

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

Click2Undo – User Manual

History ✕

Start Date
3/29/2020

End Date
4/20/2020

Search

Filter By
All Fields

Field Name	Old Value	New Value	Modified On ↑	Modified By
4/15/2020 4:55 PM				
Website	https://www.whittree...	https://www.whitetree.com	4/15/2020 4:55 PM	Limiya P
4/9/2020 12:16 PM				
Website	https://www.whittre...	https://www.whitetree.com	4/9/2020 12:16 PM	Limiya P
Fax	555 25667	---	4/9/2020 12:16 PM	Limiya P
4/9/2020 11:41 AM				
Fax	---	555 25667	4/9/2020 11:41 AM	Limiya P
Main Phone	---	555 25666	4/9/2020 11:41 AM	Limiya P
4/9/2020 11:38 AM				

1 - 29 of 29 (2 selected)

Page 1

Undo

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

White Tree Inc.
Account · Account

Summary Project Price Lists Details Field Service Scheduling Files Related

ACCOUNT INFORMATION

Account Name
White Tree Inc.

Phone
555 25666

Fax
555 25667

Website
https://www.whitetree.com

Parent Account
 Adventure Works

Timeline

Enter a note...

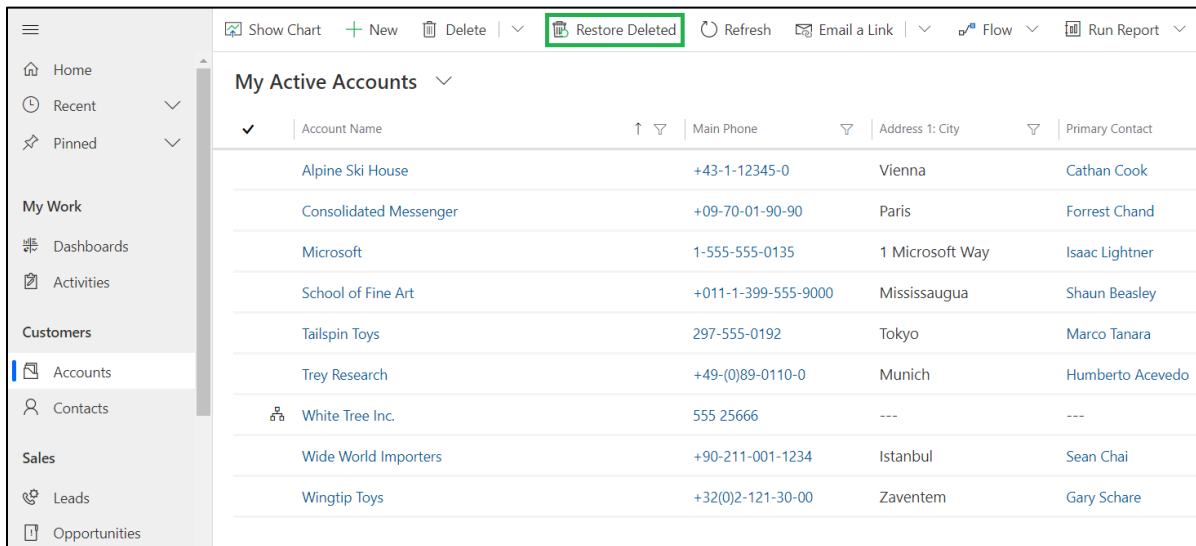
Auto-post on White Tree Inc. 4/9/2020
Account: Created By **Limiya P.**

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.



The screenshot shows the Click2Undo interface. On the left is a sidebar with navigation options: Home, Recent, Pinned, My Work, Dashboards, Activities, Customers, Accounts (selected), Contacts, Sales, Leads, and Opportunities. The main area displays 'My Active Accounts' with a table of account records. Above the table is a toolbar containing buttons for 'Show Chart', 'New', 'Delete', 'Restore Deleted' (highlighted with a green box), 'Refresh', 'Email a Link', 'Flow', and 'Run Report'. The table has columns for Account Name, Main Phone, Address 1: City, and Primary Contact.

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
School of Fine Art	+011-1-399-555-9000	Mississauga	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

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

Click2Undo – User Manual

Restore Deleted

Start Date

3/21/2020

End Date

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 (0 selected)

Page 1

Restore

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

Restore Deleted

Start Date

3/21/2020

End Date

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
<input checked="" type="checkbox"/> Riverside Inn	4/9/2020 11:46 AM	Limiya P

1 - 3 of 3 (1 selected)

Page 1

Restore

Click2Undo – User Manual

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.

My Active Accounts ▾				
✓	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
	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

3/21/2020

End Date

4/15/2020

Search

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

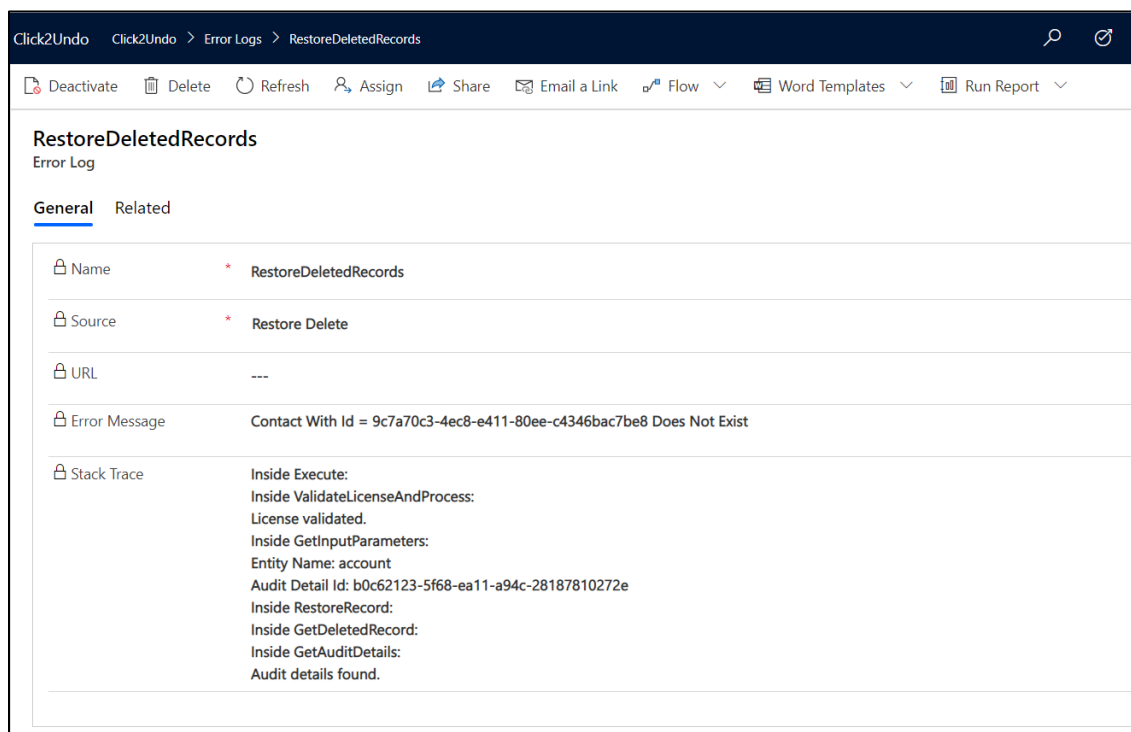
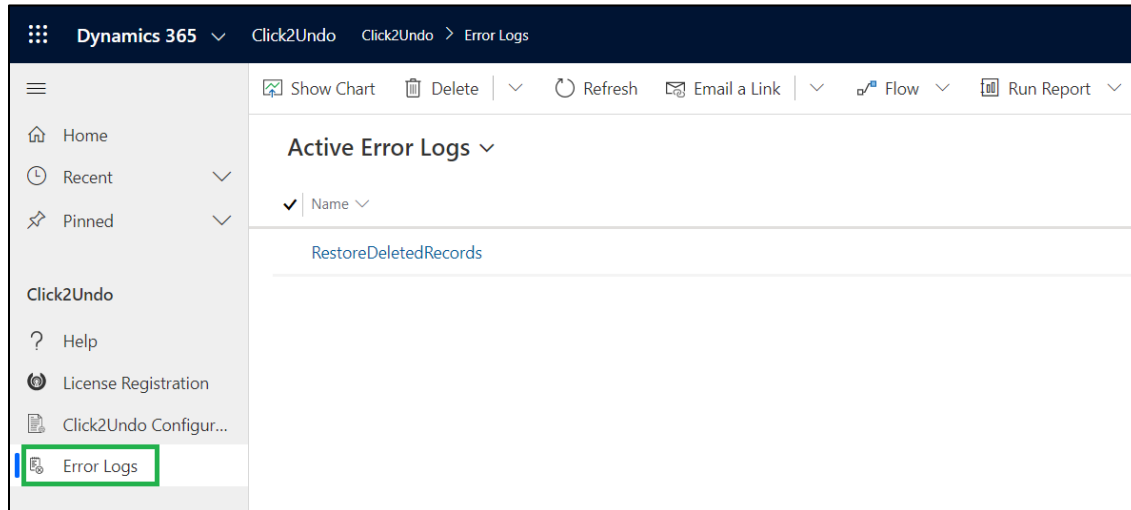
1 - 3 of 3 (3 selected)

← ← 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**.



Contact Us

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