



## User Manual

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## Introduction

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Undo2Restore (formerly known as 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, Undo2Restore 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, Dataverse (Power Apps).

**Deployment:** On-Premises and Online

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## Prerequisites

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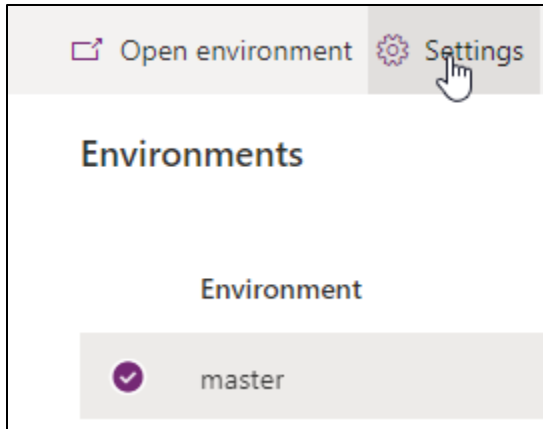
### Organization Level Auditing

Undo2Restore 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.

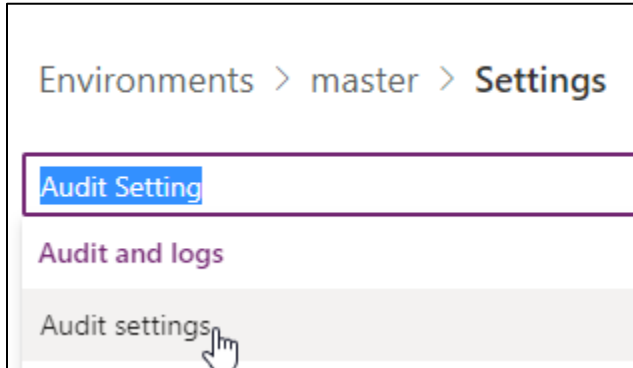
Below are the steps that needs to be undertaken in order to enable Organization Level Auditing:

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

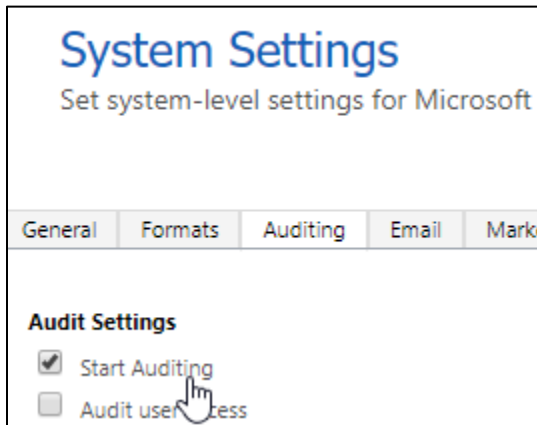
Step 2: Open Settings by selecting the correct environment



Step 3: Search for Audit Setting and Open It

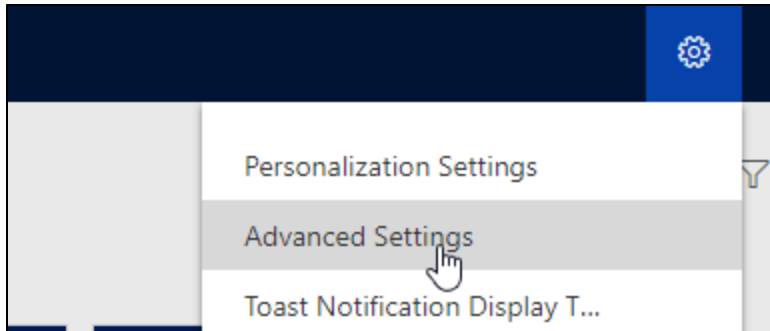


Step 4: Click Start Auditing and then Hit OK

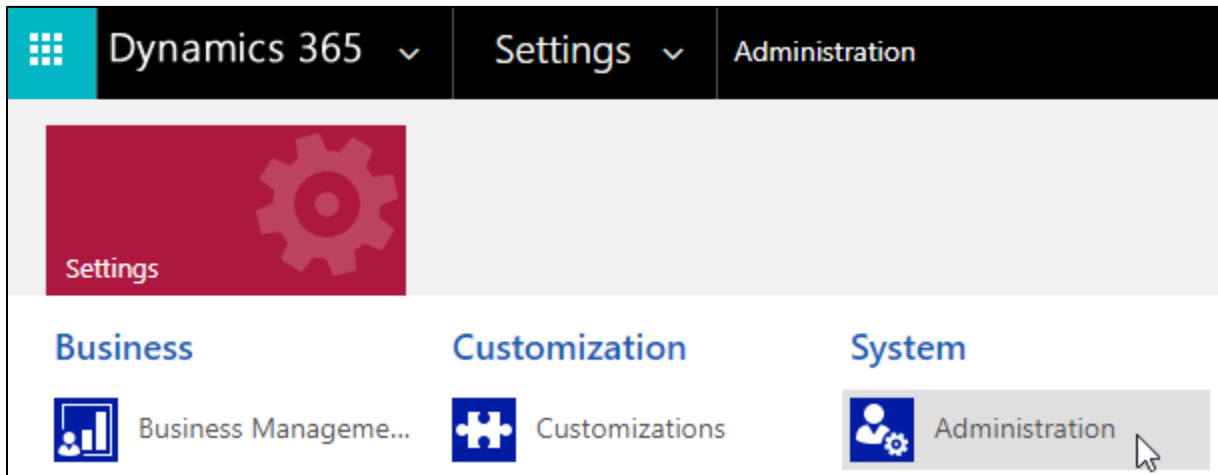


Alternate approach for enabling Organization Level Auditing

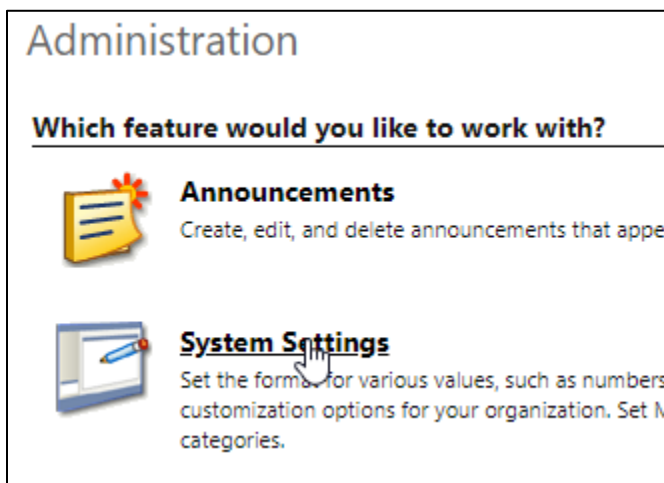
Step 1: Click on Advanced Settings in Dynamics 365 CRM



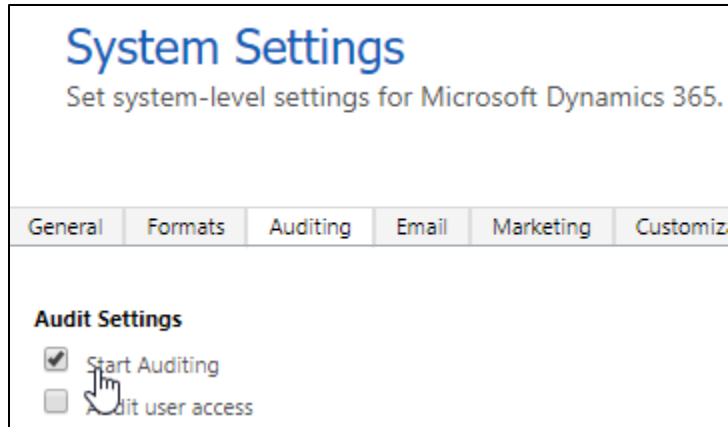
Step 2: Click on Administration



Step 3: Open System Settings



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



## Entity Level Auditing

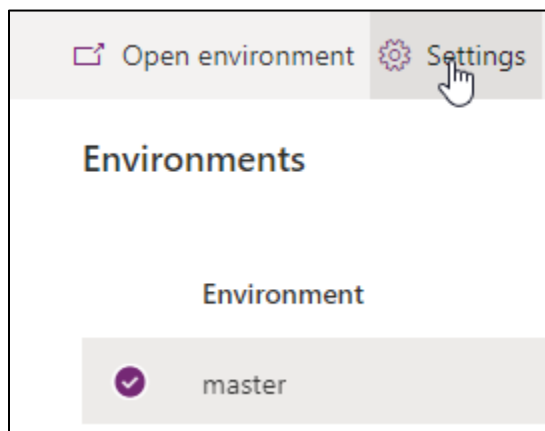
After enabling Organization Level Auditing, the next important step is to enable Entity Level Auditing.

For all the entities that need to be leveraging Undo2Restore feature you need to follow below steps in order to enable Entity Level Auditing.

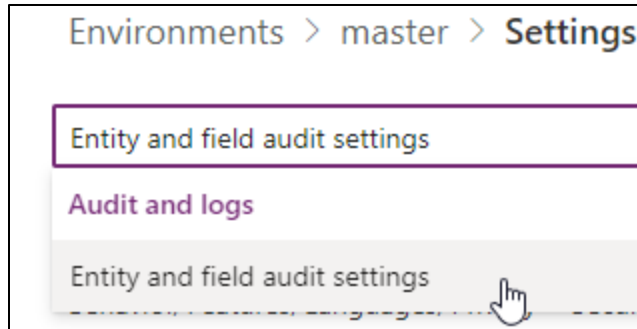
*(Note: The below illustration is done using Account entity, but the same process can be followed for the other system or custom entities as well.)*

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

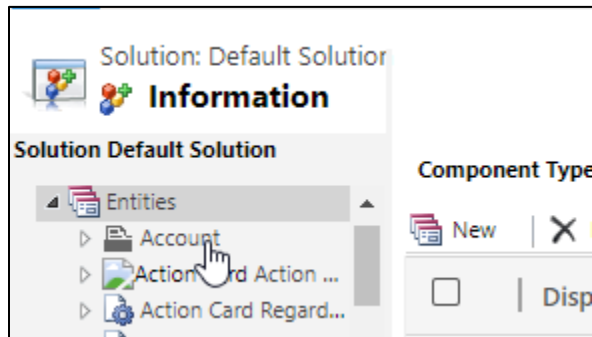
Step 2: Open Settings by selecting the correct environment



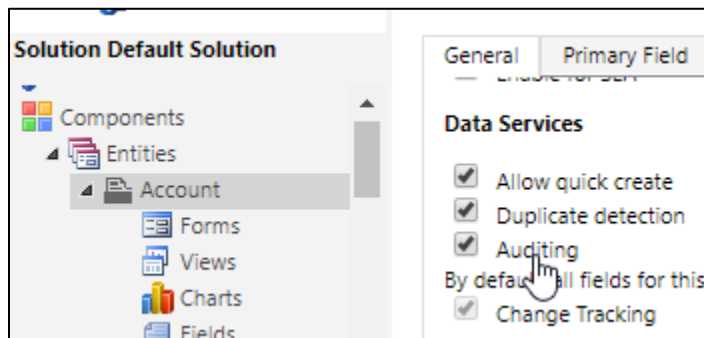
Step 3: Search for Entity and field audit Settings



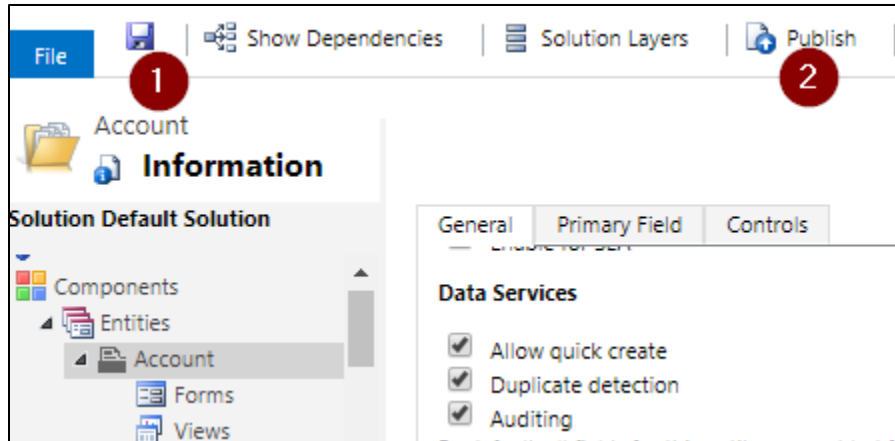
Step 4: It opens the Default Solution



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.

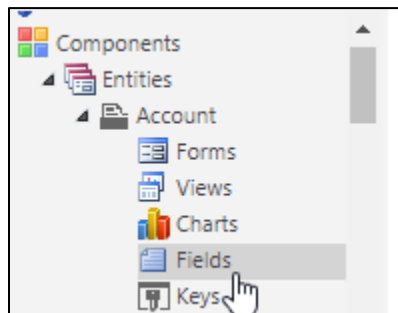
### Disable/Enable Auditing Specific Field

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.

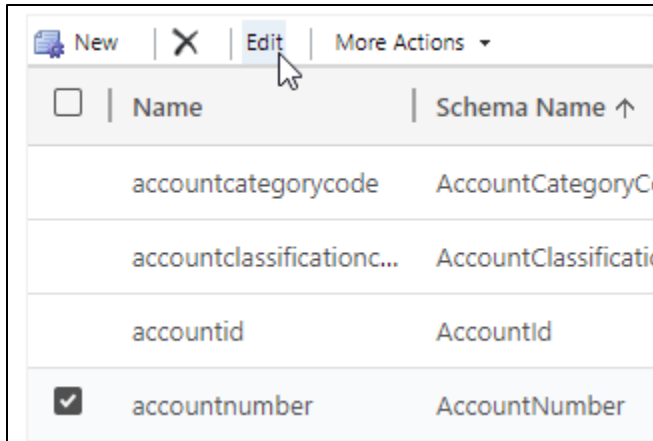
To achieve this, follow the steps given below:

Step 1: Select Fields Tab

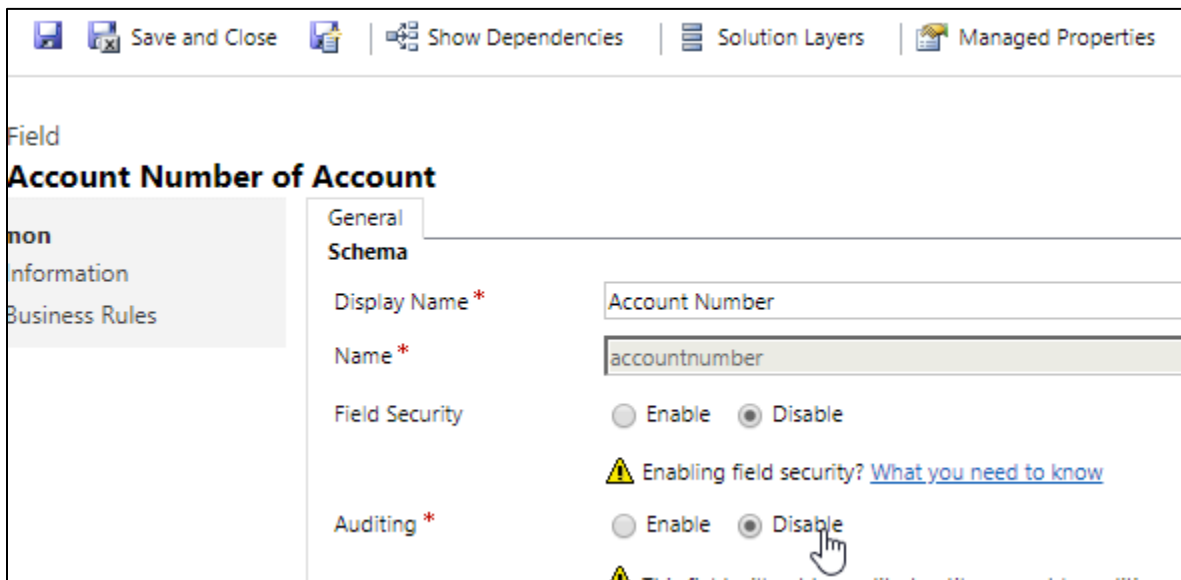


Step 2: Select the field for which you would like to disable the auditing and click Edit





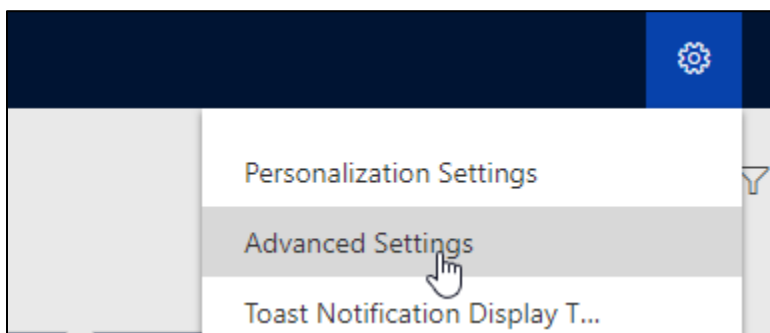
Step 3: Select Disable and then hit Save and Close



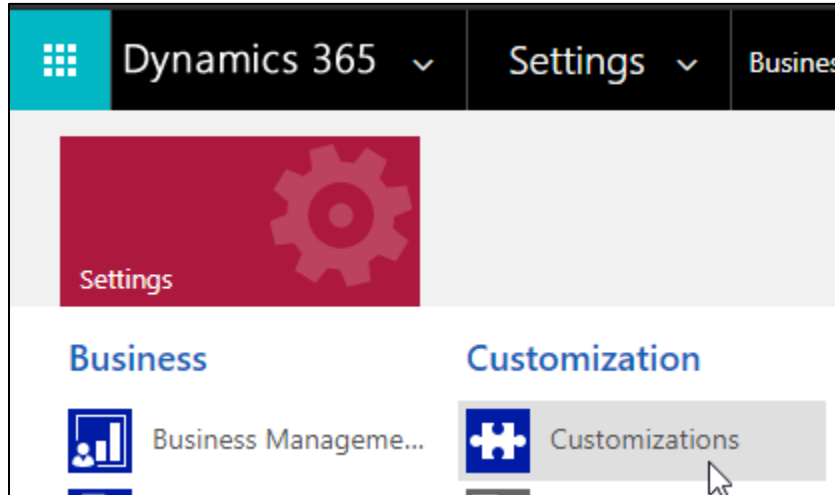
Step 4: Publish the customizations

### **Alternate approach for enabling Entity Level Auditing**

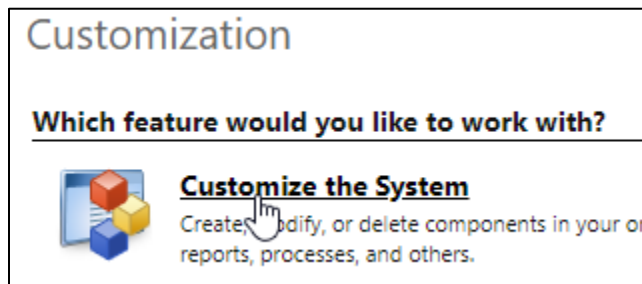
Step 1: Click on Advanced Settings from within Dynamics 365 CRM



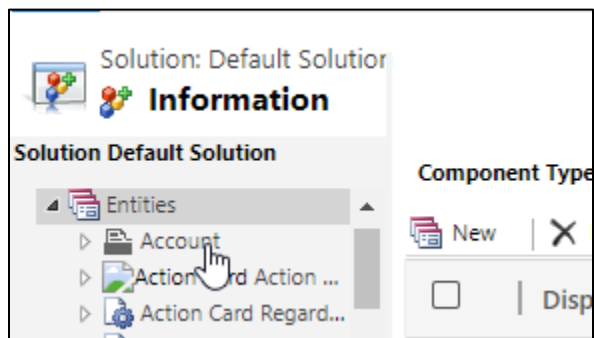
Step 2: Click on Customizations



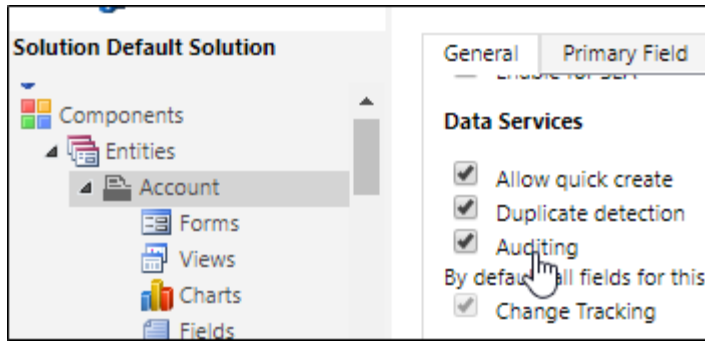
Step 3: Click on Customize the System



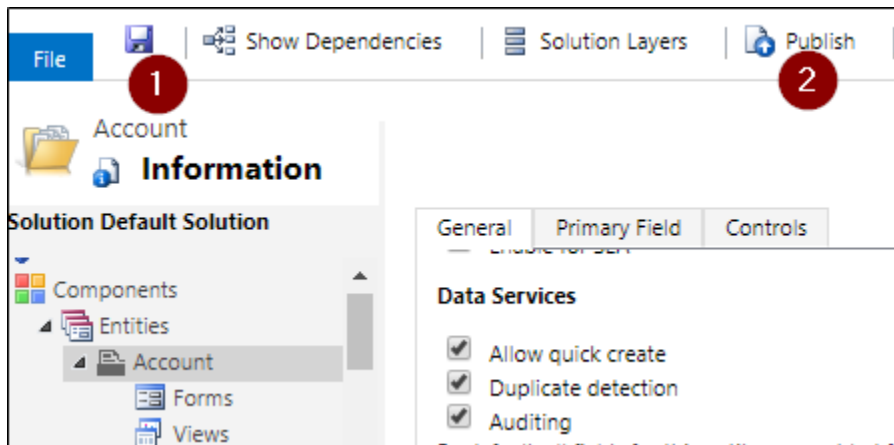
Step 4: It opens the Default Solution



Step 5: Expand Entities --> Click on Account --> Enable Auditing.



Step 6: Save and Publish.



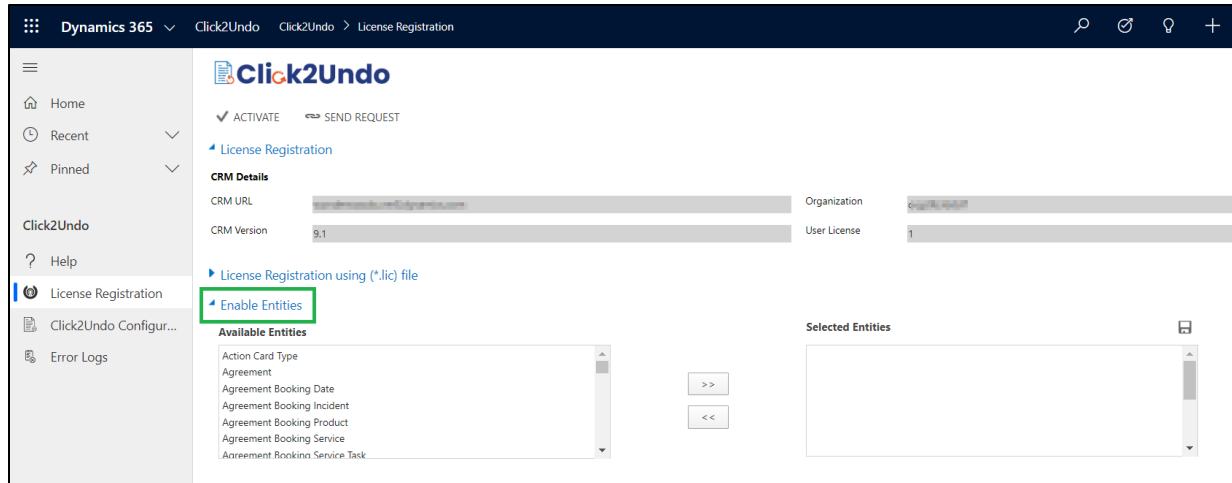
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## Entity Configuration

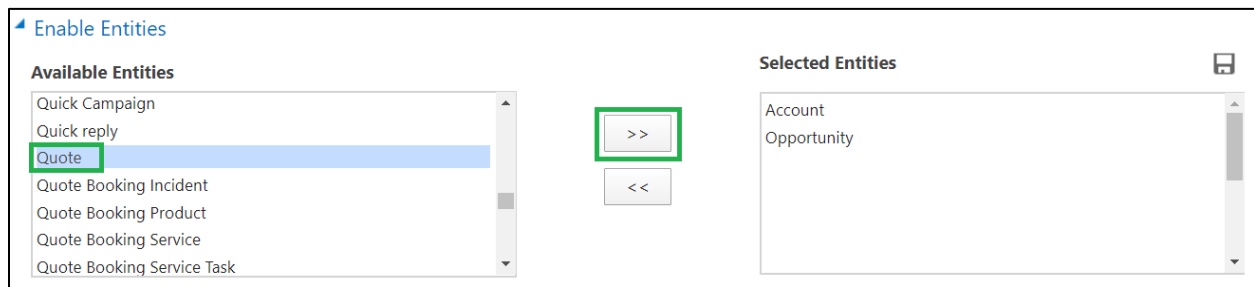
---

In order to undo the last change, restore deleted records it is necessary to enable Entities for Undo2Restore solution. Then only you can make use of Undo2Restore features.

1. To Enable Entities navigate to **Undo2Restore App → License Registration → Enable Entities**.



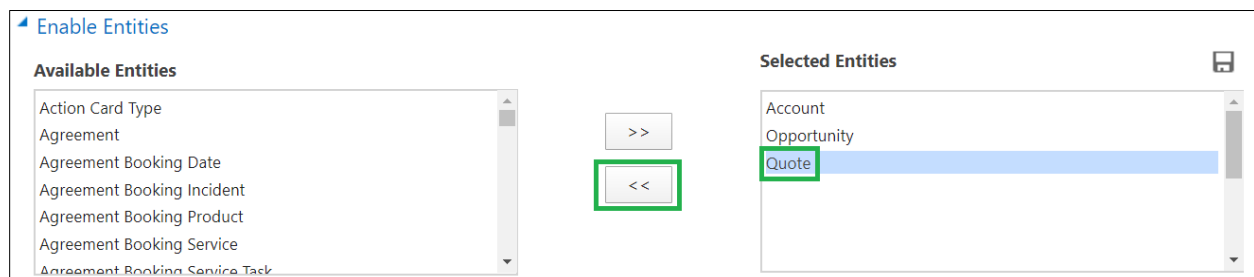
2. You can select the entities from the list of **Available Entities** and move them to the **Selected Entities**.



3. Click on **Save** button to Enable Entities for Undo2Restore solution.



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

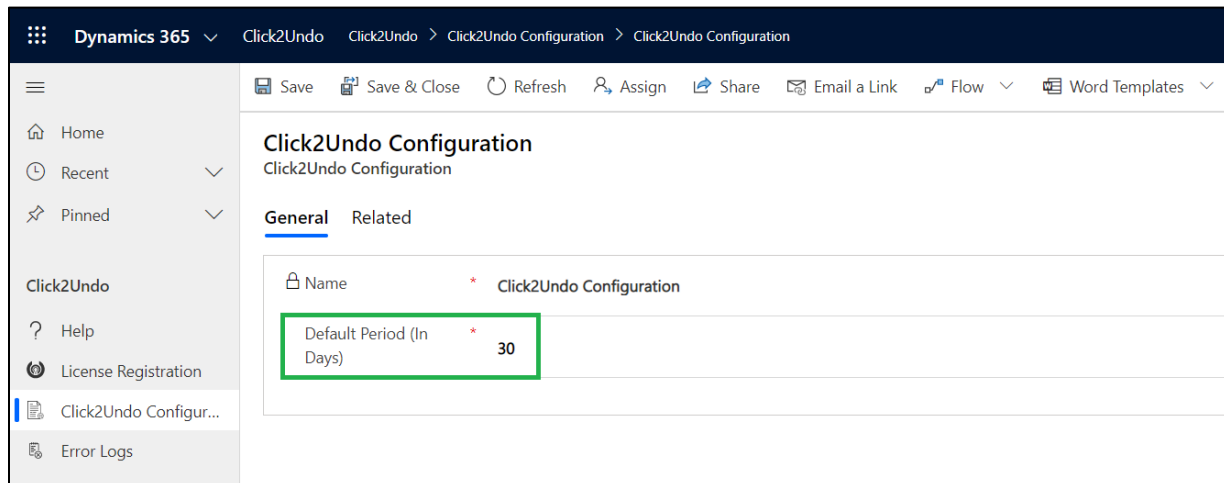


5. Here, you can see that Quote has been removed from **Selected Entities** list and is now again available in **Available Entities** list.



## Undo2Restore Configuration

Once the Entities have been enabled, go to **Undo2Restore**→**Undo2Restore Configuration**. Here, you can see the Undo2Restore 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

Undo2Restore solution provides you with 3 specific features. They are:-

1. **Undo2Restore:** 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

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## Undo2Restore

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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 Undo2Restore 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.

**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 25689

Fax  
555 25667

Website https://www.whitetree.com

Parent Account  A Datum Corporation

Ticker Symbol

**Timeline** + 🔍 ...

Enter a note...

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

Now, click on the Undo2Restore button.

## Undo2Restore – User Manual

New

Open Org Chart

Deactivate

Connect

▼

Add to Marketing List

Assign

Email a Link

Delete

Click2Undo

WT

White Tree Inc.

Account · Account ▼

--- Annual Revenue

--- Number of Employees

Summary

Project Price Lists

Details

Field Service

Scheduling

Files

Related

ACCOUNT INFORMATION

Account Name

White Tree Inc.

Phone

555 25689

Fax

555 25667

Website

https://www.whitetree.com

Parent Account

A Datum Corporation

Timeline

Enter a note...

Auto-post on White Tree Inc.

Account: Created By Limiya P.

4/9/2020

Relationship Assistant

There are currently no insights

Primary Contact

---

CONTACTS

Once you click on the **'Undo2Restore'** 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.

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 25667

Website

https://www.whitetree.com

Parent Account

Adventure Works

Ticker Symbol

Timeline

Enter a note...

Auto-post on White Tree Inc.

Account: Created By Limiya P.

4/9/2020

## History

While Undo2Restore 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 Undo2Restore → 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.



## Undo2Restore – 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="text" value="All Fields"/> |
|  |                         | <input type="button" value="Search"/>  |   |
| 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.

## Undo2Restore – 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 8:20 PM |                         |                           |
| Parent Account    | Adventure Works         | ---                       |
| 4/15/2020 6:51 PM |                         |                           |
| Website           | https://www.whitetre... | https://www.whitetree.com |
| Fax               | 555 256678              | 555 25667                 |

1 - 23 of 23 (0 selected)

Page 1

Undo

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

## Undo2Restore – 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.whitetre... | 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...

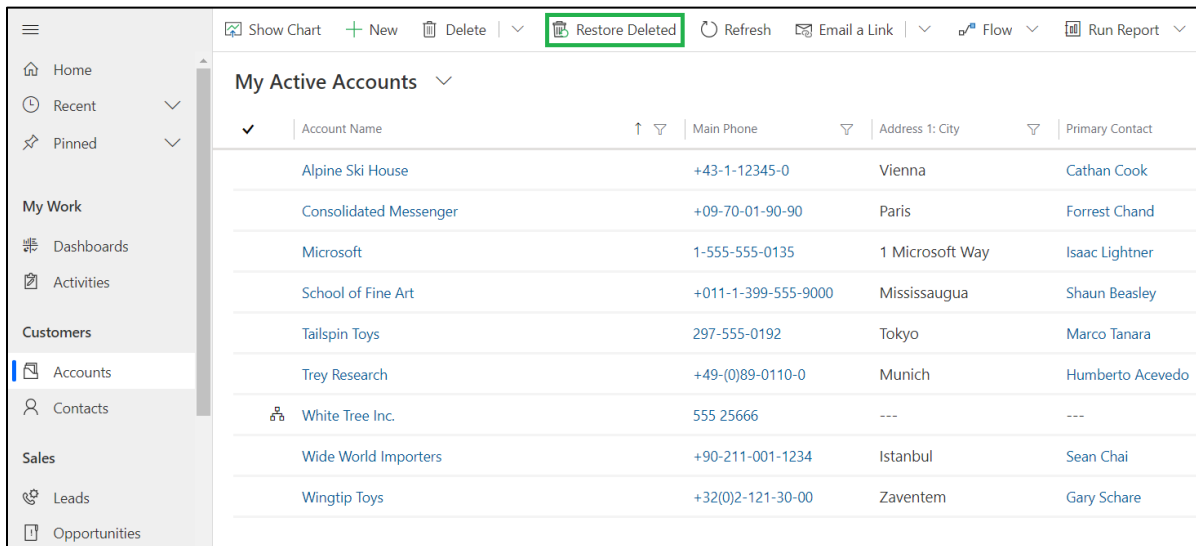
**Auto-post on White Tree Inc.** 4/9/2020   
Account: Created By **Limiya P.**

## 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 Undo2Restore Administrator role.**

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



The screenshot shows the 'My Active Accounts' page. The top toolbar includes buttons for 'Show Chart', 'New', 'Delete', 'Restore Deleted' (highlighted with a green box), 'Refresh', 'Email a Link', 'Flow', and 'Run Report'. The left sidebar shows navigation options: Home, Recent, Pinned, My Work, Dashboards, Activities, Customers, Accounts (selected), Contacts, Sales, Leads, and Opportunities. The main content area displays a table of 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   |
|   | 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.

## Undo2Restore – 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

## Undo2Restore – 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   |

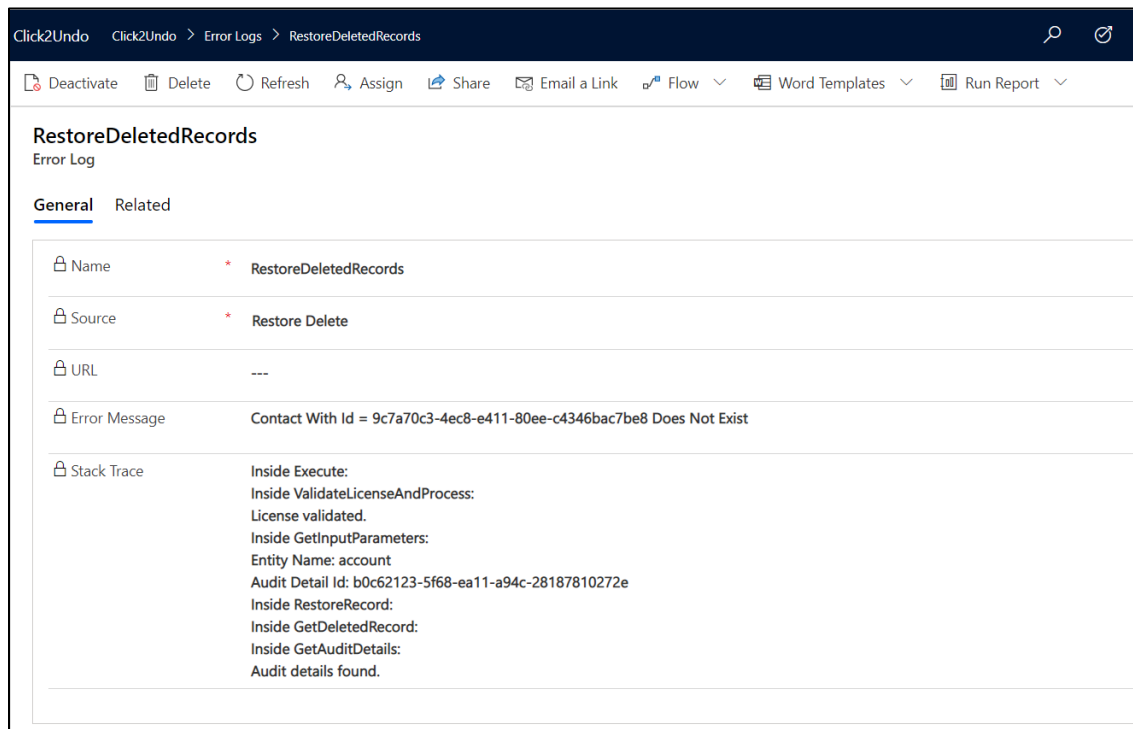
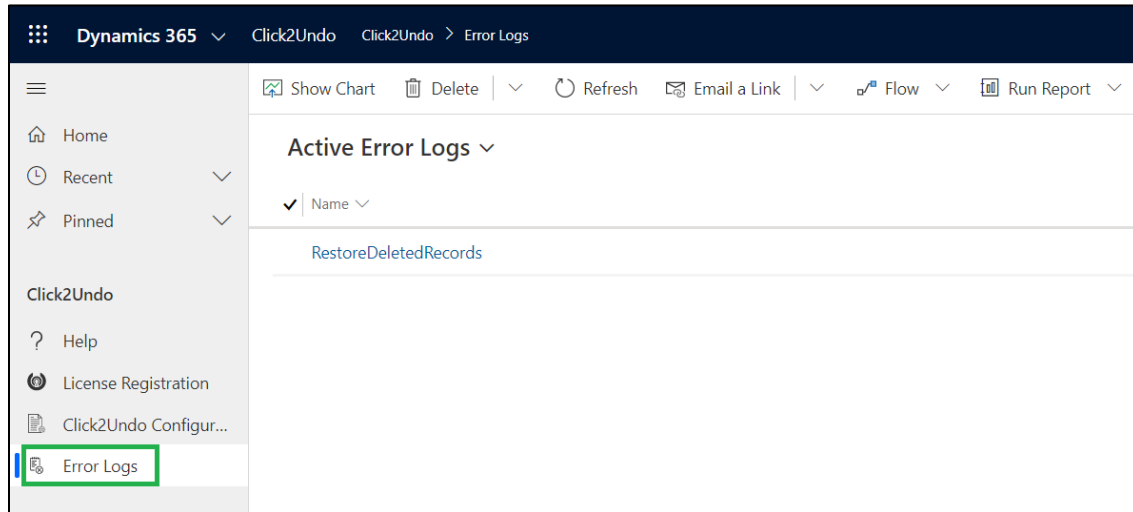
1 - 3 of 3 (3 selected)

Page 1

Restore

## Error Logs

This entity contains the log of errors that occur when any of the Undo2Restore 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 **Undo2Restore App → Error Logs**.



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## Contact Us

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**Skype** : [crm@inogic.com](mailto:crm@inogic.com)

**Twitter:** @inogic