

inøgic

User Manual

Page1 of 24

Content

Introduction	
Prerequisites	3
Entity Configuration	
Undo2Restore Configuration	
Features	
Undo2Restore	Error! Bookmark not defined.
Undo2Restore History	
	16
History	

Introduction

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

Prerequisites

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

🗰 Dynamics 365 🗸	Settings ~	Administration
Settings		
Business	Customization	System
Business Manageme	Customization	s Administration

Step 3: Open System Settings



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

System Settings Set system-level settings for Microsoft Dynamics 365.							
General	Formats	Auditing	Email	Marketing	Customiz		
General Formats Auditing Email Marketing Customiz Audit Settings Image: Start Auditing Image: Start Auditing							

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 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

Undo2Restore – User Manual							
File Show Dependent Account	cies 🗟 Solution Layers 🔓 Publish						
Solution Default Solution	General Primary Field Controls Data Services Image: Allow quick create Image: Duplicate detection Image: Auditing Image: Auditing						

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

🛃 Save and Clos	se 🛛 🔓 🛛 🖷 Show Deper	ndencies 🛛 🚆 Solution Layers 🔹 🚰 Managed Properties
Field		
Account Number	of Account	
non Information	General Schema	
Business Rules	Display Name *	Account Number
	Name *	accountnumber
	Field Security	Enable Disable
		A 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

	٢	
Personalization Settings		T
Advanced Settings		
Toast Notification Display T		

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.



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 \rightarrow **License Registration** \rightarrow **Enable Entities.**

🗰 Dynamics 365 🗸	Click2Undo ⊂ Click2Undo → License Registration		م	Ø	Q	+
=	≧Click2Undo					
 ☆ Home ③ Recent ∨ ☆ Pinned ∨ 						
☆ Pinned ∨ Click2Undo	CRM Details CRM URL CRM Version a +	Organization				
? Help	CRM Version 9,1 License Registration using (*.lic) file	User License 1				
 License Registration Click2Undo Configur 	Enable Entities Available Entities	Selected Entities				
🖏 Error Logs	Action Card Type Agreement Agreement Booking Date Agreement Booking Incident Agreement Booking Froduct Agreement Booking Service Agreement Booking Service Task.					

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

-	Enable Entities				
	Available Entities			Selected Entities	
	Quick Campaign			Account	A
	Quick reply		>>	Opportunity	
	Quote				
	Quote Booking Incident		< <		
	Quote Booking Product				
	Quote Booking Service				
	Quote Booking Service Task	•			•

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

Enable Entities				_
Available Entities			Selected Entities	
Quick reply	^		Account	A
Quote Booking Incident		>>	Opportunity	
Quote Booking Product			Quote	
Quote Booking Service		<<		
Quote Booking Service Task				
Quote Booking Setup				
Quote Invoicing Product	•			•

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

4	Enable Entities				
	Available Entities			Selected Entities	
	Action Card Type	A		Account	
	Agreement		>>	Opportunity	
	Agreement Booking Date			Quote	
	Agreement Booking Incident		< <		
	Agreement Booking Product				
	Agreement Booking Service				
	Agreement Rooking Service Task	•			¥

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

4	Enable Entities				
	Available Entities			Selected Entities	
	Quick Campaign	٠		Account	
	Quick reply Quote		>>	Opportunity	L
	Quote Booking Incident		<<		
	Quote Booking Product				
	Quote Booking Service				
	Quote Booking Service Task	•			•

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 effortessly. You can update the numeric value of this field (i.e. 5, 10, 28, 36) depending upon your business requirement.

	Dynamics 365 $\!$	Click2Undo Click2Undo > Click2Undo Configuration > Click2Undo Configuration	
≡		🔚 Save 📓 Save & Close 🖒 Refresh 🔗 Assign 🖻 Share 🖾 Email a Link 🖉 Flow \vee 🖷 Word Templates 🕚	/
ഹ	Home	Click2Undo Configuration	
Ŀ	Recent 🗸	Click2Undo Configuration	
\$	Pinned 🗸	General Related	
Clic	k2Undo	A Name * Click2Undo Configuration	
?	Help	Default Period (In *	
0	License Registration	Days)	
	Click2Undo Configur		
£a⊗	Error Logs		

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

Undo2Restore

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 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.

White Tree Inc. Account · Account ~ Summary Project Price Lists Detai	ils Field S	Service Scheduling Files Related	
ACCOUNT INFORMATION	*	Timeline	+ 7 …
White Tree Inc.		Enter a note	Û
Phone 555 25689	Ś	Auto-post on White Tree Inc. Account: Created By Limiya P.	4/9/2020 🖵
Fax			
555 25667			
Website			
https://www.whitetree.com	\oplus		
Parent Account			
A Datum Corporation			
Ticker Symbol			

Now, click on the Undo2Restore button.

– New 🛃 Open Org Chart 🛛 🗋 Dea	ctivate $^{ m R}_{ m A}$	Connect	🞗 Assign 🖾 Email	a Link 🛍 Delete 🔿 Click2Undo
White Tree Inc.				Annual Revenue Number of Employees
Summary Project Price Lists De	tails Field S	Service Scheduling Files Related		
ACCOUNT INFORMATION		Timeline	$+ \forall \cdots$	Relationship Assistant
Account Name	*	Enter a note	0	
White Tree Inc.				① There are currently no insight
		Auto-post on White Tree Inc. Account: Created By Limiya P.	4/9/2020	
Phone				
Phone 555 25689	S	Account. Created by Linnya P.		Primary Contact
	S	Account created by Linnya P.		Primary Contact
555 25689	S.	Account citated by Ennya F.		
555 25689 Fax	&	Account citated by Ennya F.		

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.

White Tree Inc. Account · Account ~			
Summary Project Price Lists	Details Field S	ervice Scheduling Files Related	
ACCOUNT INFORMATION		Timeline	$+ \forall \cdots$
Account Name	*	Enter a note	Û
White Tree Inc. Phone 555 25666	Ś	Auto-post on White Tree Inc. Account: Created By Limiya P.	4/9/2020 🖵
Fax 555 25667			
Website https://www.whitetree.com	\oplus		
Parent Account Adventure Works			
Ticker Symbol			

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:



Click on the downward arrow near Undo2Restore \rightarrow Click on History.

White Tree Account · Acco			4 Histor	ry
ummary Project Pr	ice Lists Details Field Service	Scheduling Files Related		
ACCOUNT INFORM	ATION	Timeline	$+ \forall \cdots$	Relationship Assistant
Account Name	* White Tree Inc.	Enter a note	0	① There are current
Phone	555 25666 %	Auto-post on White Tree Inc. Account: Created By Limiya P.	4/9/2020 🖵	
Fax	555 256679	Account. Created by Linnya P.		Primary Contact
Website	https://www.white.c 🕀			
	• • •			CONTACTS

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.

History				×
Start Date	End Date		Filter By	
3/26/2020	4/20/2020	Search	All Fields	\sim
✓ Field Name	Old Value	New Value	All Fields	
Parent Account		Adventure Works	Fax	-
✓ 4/15/2020 8:40 PM			Parent Account Main Phone	
Fax	555 25667		✓ Main Phone 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)				$\stackrel{\bullet}{\leftarrow} Page_1 \rightarrow$
				Undo

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

P a g e 18 of 24

Histo	ory						×
Start	t Da	ate	End Date		Filter By		
3/2	29/2	2020	4/20/2020	Search	All Fields	\sim	
	~	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					
0		Website	https://www.whitetre	https://www.whittree,com	4/9/2020 12:16 PM	Limiya P	
0		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 - 2	29 of	f 29 (2 selected)				I← ← Page 1	\rightarrow
						Undo	D .

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

White Tree Inc. Account · Account ~ Summary Project Price Lists D	etails Field S	Service Scheduling Files Related	
ACCOUNT INFORMATION Account Name White Tree Inc.	*	Timeline Enter a note	+ 7 …
Phone 555 25666	Ś	Auto-post on White Tree Inc. Account: Created By Limiya P.	4/9/2020 🏹
Fax 555 25667 Website https://www.whitetree.com			
Parent Account			

P a g e 19 of 24

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.

≡		\fbox Show Chart $+$ New f Delete $ $ \vee	🔃 Restore Deleted 🕐 Refresh 🛛 🖾 Email a	Link 🛛 🗸 🗗 🗸 Link	🔟 Run Report 🖂
ŵ Home ① Recent		My Active Accounts $\ \lor$			
Pinned	~	✓ Account Name	↑ ♀ Main Phone ♀	Address 1: City	Primary Contact
		Alpine Ski House	+43-1-12345-0	Vienna	Cathan Cook
My Work		Consolidated Messenger	+09-70-01-90-90	Paris	Forrest Chand
비트 Dashboards		Microsoft	1-555-555-0135	1 Microsoft Way	Isaac Lightner
Activities		School of Fine Art	+011-1-399-555-9000	Mississaugua	Shaun Beasley
Customers		Tailspin Toys	297-555-0192	Tokyo	Marco Tanara
Accounts		Trey Research	+49-(0)89-0110-0	Munich	Humberto Acevedo
A Contacts	- 1	器 White Tree Inc.	555 25666		
Sales		Wide World Importers	+90-211-001-1234	Istanbul	Sean Chai
🕸 Leads		Wingtip Toys	+32(0)2-121-30-00	Zaventem	Gary Schare
U Opportunities					

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

store Deleted			
art Date	End Date		
/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	
3 of 3 (0 selected)			I← ← Page 1
			Restor

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

Restore Deleted			\times
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	
			Ŧ
1 - 3 of 3 (1 selected)		$I \leftarrow \epsilon$ Page	$_1 \rightarrow$
		Rest	ore

P a g e 21 of 24

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 Ac	tive Accounts $$				
~	Account Name	1 7	Main Phone 🛛	Address 1: City	Primary Contact
格	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
格	Riverside Inn		555 24881		
	School of Fine Art		+011-1-399-555-9000	Mississaugua	Shaun Beasley
	Tailspin Toys		297-555-0192	Токуо	Marco Tanara
	Trey Research		+49-(0)89-0110-0	Munich	Humberto Acevedo
ጽ	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.

estore Deleted						>
Start Date		End Date	 			
3/21/2020		4/15/2020	Search			
 Deleted Record 		Deleted On ↑	Deleted By			
Stellar Corporation	on	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)					I←	← Page 1

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** \rightarrow Error Logs.

	Dynamics 365 \vee	Click2Undo Click2Undo > Error Logs
≡		🕼 Show Chart 📋 Delete 🗸 🖒 Refresh 🖾 Email a Link 🗸 🛷 Flow 🗸 🗐 Run Report 🗸
ሴ	Home	Active Error Logs \sim
Ŀ	Recent 🗸	
\$	Pinned 🗸	✓ Name ✓
		RestoreDeletedRecords
Click2Undo		
?	Help	
License Registration		
Click2Undo Configur		
🖏 Error Logs		

Deactivate 🗐 Delete	🖒 Refresh 🔗 Assign 🖻 Share 🖾 Email a Link 🖉 Flow 🗸 🖻 Word Templates 🗸 🔟 Run Report 🗸	
estoreDeletedRec	and a	
ror Log	ords	
eneral Related		
🔒 Name	* RestoreDeletedRecords	
🔒 Source	* Restore Delete	
-		
🗄 URL		
🛆 Error Message	Contact With Id = 9c7a70c3-4ec8-e411-80ee-c4346bac7be8 Does Not Exist	
A 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

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

A/301, Everest Nivara InfoTech Park,

TTC Industrial Area, MIDC, Turbhe

Navi Mumbai, Maharashtra 400705

INDIA

E-mail : <u>crm@inogic.com</u>

Skype : <u>crm@inogic.com</u>

Twitter: @inogic