True Field History Standard Plan Guide

Welcome to True Field History!

This guide will walk you through the features and functionalities of our app, designed to help you efficiently track changes across various objects in Salesforce. But before diving into the app's capabilities, let's explore why tracking field history is **useful**.

Why Your Business Needs True Field History:

Unlimited Field and Object Tracking
True Field History lets you track changes across Salesforce fields and objects in real-time, with no limits. Every update is captured, giving you complete visibility into your data and ensuring no critical information is missed.

Complete Visibility
Gain full transparency into who made changes, when they occurred, and what the previous values were. This ensures better data integrity and improved management.

Effortless Change Management
Easily search for specific updates with filters and restore previous values effortlessly using the rollback feature.

With True Field History, your Salesforce data is fully tracked and transparent, empowering you to manage changes efficiently and stay in control.

Let's get started!

Installing

1. **Access the Installation Link:**

Go to the Salesforce AppExchange and search for **"True Field History"**, or simply click **here** to go directly to the app page.

2. **Initiate Installation:**

Once on the app page, click **"Get It Now"** to begin the installation process.

3. **Confirm Installation Details:**

Review the required permissions for the app to ensure they meet your organization's policies.
Important: select **Install for Admins Only** to keep restricted features unavailable for every standard user. You will be able to grant these permissions after the package is installed.
After reviewing, click **"Confirm and Install"** to proceed.

4. **Choose Your Role:**

You will be prompted to choose your role or user type within your Salesforce organization. Select the role that best aligns with your responsibilities and access needs.

5. **Complete Installation:**

If not already logged in, enter your Salesforce credentials to complete the installation.
After installation, you will receive a confirmation email from Salesforce.

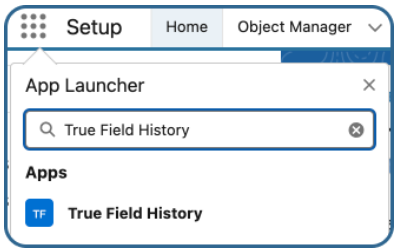
6. **Log in to Salesforce:**

Open your web browser and go to the Salesforce login page. Enter your username and password, then click **"Log In"**.

7. **Access the App**

Once logged in, go to the App Launcher from the Salesforce dashboard.

Type **"True Field History"** in the search bar, select the app from the results, and click on it to open.



Congratulations! You've successfully logged in to Salesforce and accessed the True Field History app. Now, to ensure the app functions properly and captures all the necessary data, let's move on to the **Setup** process. This will configure the app and allow you to start tracking changes efficiently.

Setup

To ensure that True Field History functions correctly and tracks data as expected, we need to assign a **Permission Set**. This setup process will allow the app to access the required fields and objects, establish permissions, and ensure that changes are tracked across your Salesforce environment in real-time.

Users with the **System Administrator** profile already have full access to True Field History, including configuration. Permission sets are only needed for users with other profiles.

License Assignment

True Field History works only for users who have a **True Field History license**. Users without a license can't open the app or see the True Field History component on record pages, and their changes are not recorded in the history (saving records is never blocked). This applies to every user, including

integration and automation users: if their changes should be tracked, they need a license too.

- **If your organization has a site license, all users are licensed automatically and you can skip this step.**
- **If your organization has a limited number of licenses, assign a license to every user who needs the app or whose changes should be tracked:**

1. Go to **Setup** → **Installed Packages**.
2. Find **True Field History** and click **Manage Licenses**.
3. Click **Add Users**, select the users and click **Add**.

Permission Set Assignment

Use this guide to assign the appropriate permission sets based on the user's role in True Field History. Each permission set grants access to specific features and actions within the component.

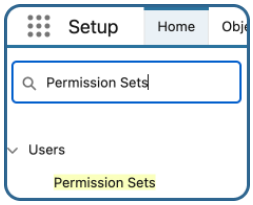
The following permission sets are available:

- **True Field History Tracker – Standard**
  Provides access to the True Field History component and allows users to view and track field history.
- **True Field History Tracker – Admin**
  Grants permissions to configure and manage True Field History settings.
- **True Field History Rollback Action**
  Allows users to use the Rollback functionality within the True Field History component.
- **True Field History Delete Action**
  Allows users to use the Delete functionality within the True Field History component.

When the package is installed for Admins Only, the **System Administrator** profile receives all of these permissions, so users with this profile don't need these permission sets.

Users with other profiles need the True Field History Tracker - Admin permission set to configure the application. The steps below show how to assign it (the same steps work for any permission set).

1. **Managing Permission Sets**:
   • Navigate to the **Salesforce Setup** page.
   • In the **Quick Find** search field, type **Permission Sets** and click on it.



2. **Assigning Permission Sets**:
   • Select the **True Field History Tracker - Admin** Permission Set (to assign users who require administrative privileges):



   • Click on **Manage Assignments**.

3. **Add Your User in Assignment**:
   • In the Manage Assignments window, click on the **Add Assignment** button.
   • Mark the checkbox next to the user you want to assign and click **Next**.

4. **Specify and Check Details**:
   • Choose an Expiration Date for the assignment or select No Expiration Date.
   • Press the **Assign** button to confirm.

5. **Confirm Permission**:
   • A confirmation notification will appear once the permission is successfully assigned.

- Click **Done** to complete the process.

Flow Activation in Production Organizations

In **Salesforce Production organizations**, all newly deployed Flows are created in Draft (deactivated) state by default.
Because of this, additional steps are needed **only in Production**.

If you are using:

- Sandbox
- Trial
- Developer Edition

you can safely skip this section.
All flows will be deployed active **automatically**.

Two ways to activate True Field History Flows in Production Organizations

Option 1: Enable automatic Flow activation

This option allows Salesforce to automatically activate flows during deployment.

⚠️ **Important notes:**

- This setting affects all flows in your org, not only True Field History.
- Enabling it will trigger all Apex tests.
- Flow creation may take a significant amount of time.
- This option is not recommended for all organizations, especially large or sensitive environments.

Steps to enable automatic activation:

1. Go to **Setup**
2. Search for **Process Automation Settings**
3. Enable **Deploy Processes and Flows** as active

4. Set Flow Test Coverage Percentage to **0%**

5. **Save** changes

After this, True Field History flows will be created and activated automatically.

Option 2: Activate flows manually

If you skip automatic activation:

- All True Field History flows will be deployed as Draft
- You will need to activate them manually

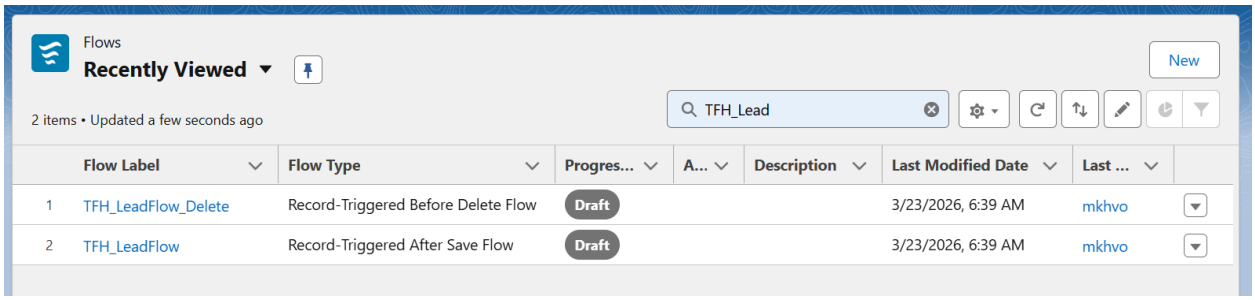
How to activate flows manually:

1. Open **App Launcher** (the 9-dot icon in the top-left corner)

2. Search for **Flow** and open it

3. Find flows with names starting with **TFH_** (for example: TFH_ContactFlow, TFH_LeadFlow).

4. After that, you will see two flows like in the screenshot:



   the flow **with _Delete** allows tracking of deletions, while the flow **without _Delete** tracks regular changes.

5. Click on one of the flows to open its details, then click *Open Flow* in the top-right corner.



6. Click **Activate**
7. Repeat steps 5–6 for the other flow.

Once activated, the configuration will start working immediately.

Final reminder: all these steps are required **only** if you are setting up this application in the Salesforce **Production** organization. Otherwise all flows will be created and activated **automatically**.

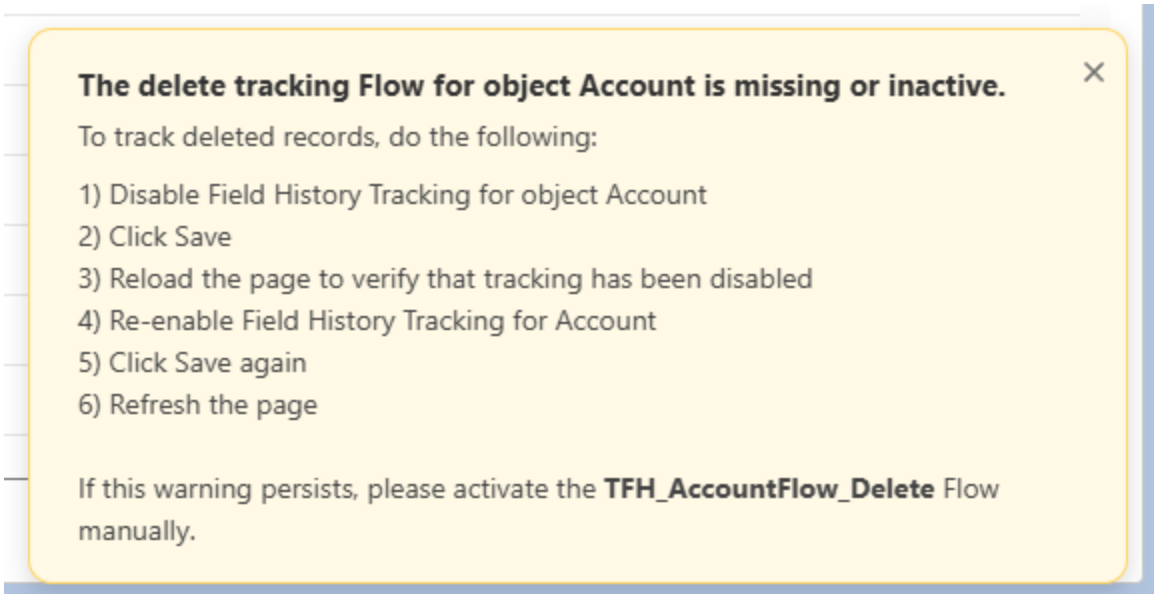
True Field History Configuration

For those who have previously used True Field History

If you've previously used True Field History, you should know that tracking used to rely on a single flow. Now it uses two flows instead. So, if you also want to track deletions, you will need to:

1. Disable Field History Tracking for the object you want to track deletions for
2. Click **Save** and wait about 5 seconds
3. Reload the page
4. Re-enable Field History Tracking for the same object
5. Click **Save** again
6. Wait about 5 seconds and refresh the page

To help you understand which objects require enabling the Delete Flow, we've added a warning that includes these steps and looks like this:



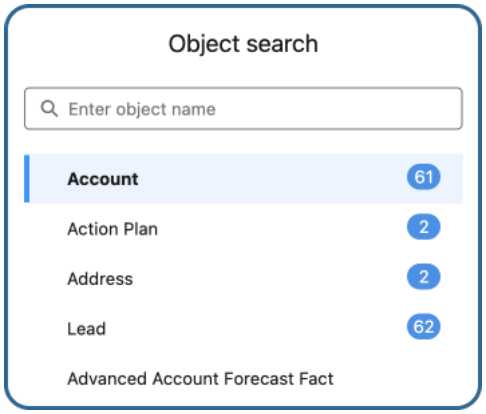
If you've completed the steps above for the desired object but still see this warning, try enabling the Delete Flow manually using the instructions below.

Configuration Setup

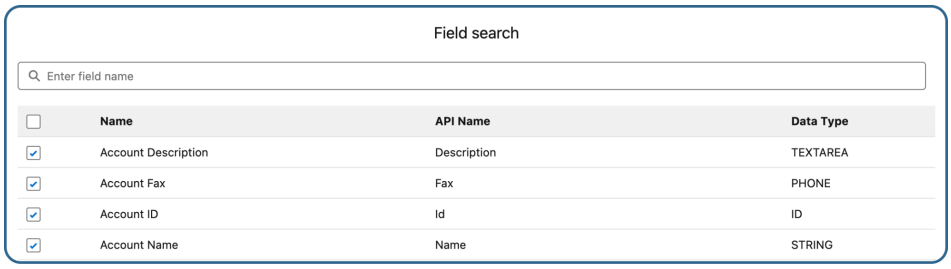
Before you can start tracking changes to fields in Salesforce, you need to configure the required objects and fields. Follow these steps:

1. **Access the True Field History Configuration:**
   • Click the **App Launcher** icon located in the top-left corner of the screen.
   • In the search bar, type **True Field History** and select it.
   • The **True Field History Configuration** window will open, displaying options to configure objects and fields for history tracking.

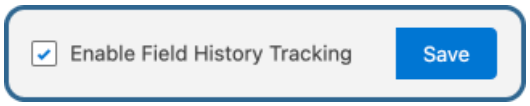
2. **Select the Object to Track:**
   • Use the **Object Search Bar** (top-left) to find the object you want to track (e.g., Account, Lead, Event, etc.).
   • Click the object name to view its fields.



3. **Select Fields to Track:**
   • Use the Field Search Bar to choose specific fields.
   • Check the box next to each field name to enable tracking for that field.
   • To select all fields, check the box located next to the "Name" column header at the top of the list.



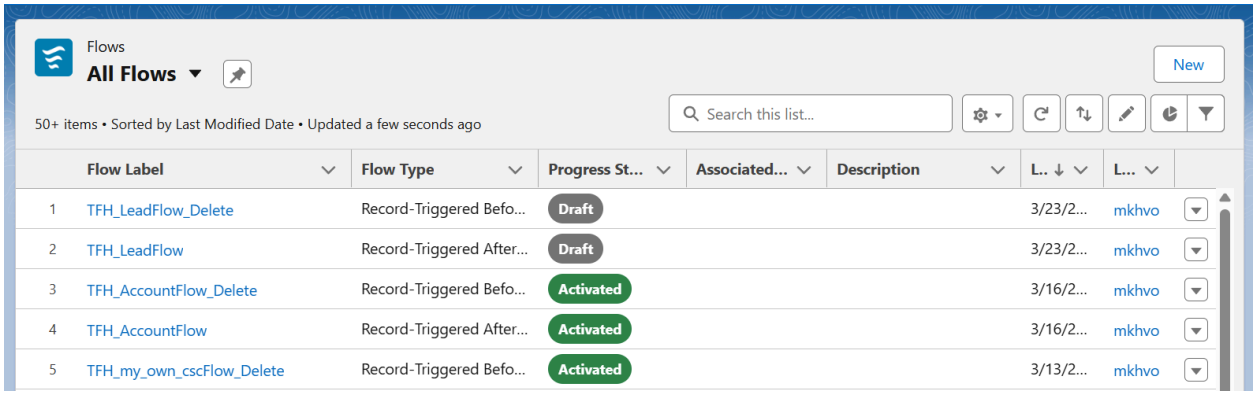
4. **Enable Field History Tracking:**
   • On the top-right of the window, check the **Enable Field History Tracking** box.
   • Click Save to apply your changes.



5. **Confirm that everything is set up correctly:**
   • Navigate to App Launcher → **Flows**.
   • Select **All Flows** (not “Recently Viewed”)
   • Sort by **Last Modified Date**

• The first two flows in the list represent your True Field History configuration.
Each flow follows this naming pattern: **TFH_<ObjectName>Flow** and **TFH_<ObjectName>Flow_Delete**. For example, for the Lead object, the flows will be named
TFH_LeadFlow and TFH_LeadFlow_Delete.

For custom objects, double underscores are removed from the API name and the namespace prefix is dropped: for **Placement__c** (or **acme__Placement__c**), the flows are named **TFH_PlacementcFlow** and **TFH_PlacementcFlow_Delete**.
If both flows are present, your setup has been completed successfully.



In the object list, the number of tracked fields is shown in **blue** when tracking is active. If it stays **grey**, tracking for this object is not active: Field History Tracking was disabled, or its flows were not created or activated (see **Flow Activation in Production Organizations**).

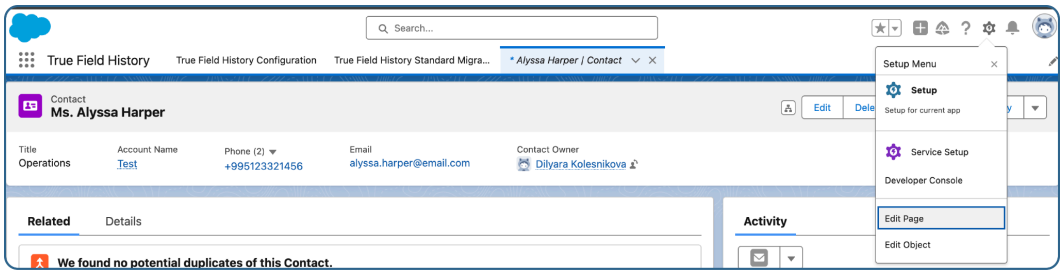
Note: the configuration lists every field of the object, regardless of field-level security. History, however, is recorded only for fields that are visible to the user who saves the record. If a field is hidden from that user by field-level security, changes to it are not tracked, for example, when an automation or integration running as this user updates the field.

Viewing Field History Changes

Adding the True Field History Component

Now, we need to add the **True Field History** component to the pages of the objects that we want to track changes for. To do this, follow the steps below:

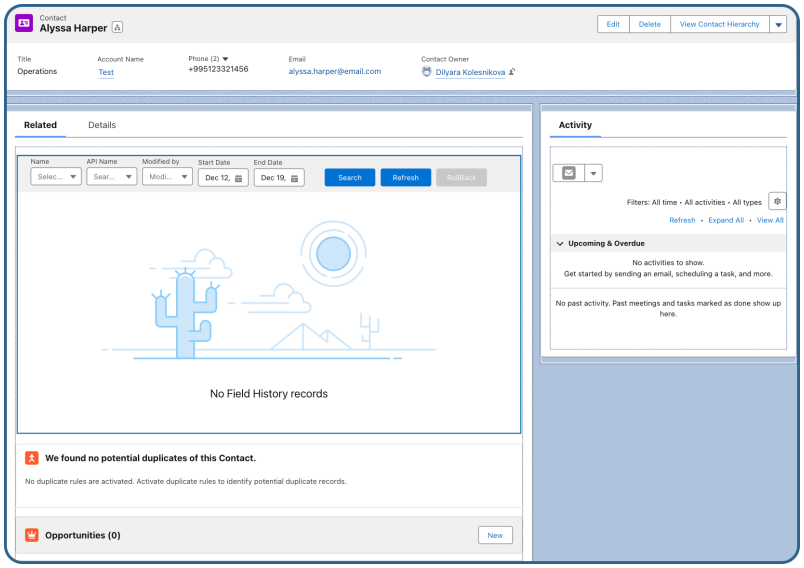
1. **Navigate to the Object Page and Open the Edit Layout:**
   • Go to the page of any object you want to track changes for (e.g., a contact page).
   • Click on the **gear icon** at the top right of the page and select **"Edit Page"** from the dropdown menu. This will open the page layout editor.



2. **Add the True Field History Component:**
   • In the page layout editor, locate the **True Field History** component in the left column under **Components**.



   • Drag and drop the **True Field History** component to the desired location on the page layout where you want to display the field history.
   For example:



3. **Activate and Set as Org Default:**
   • After positioning the **True Field History** window, click **Activation** at the top right of the page layout editor.
   • Click the **Assign as Org Default** button.
   • Select **Desktop and Phone**, then click **Next**.
   • In the resulting window, click **Save**.

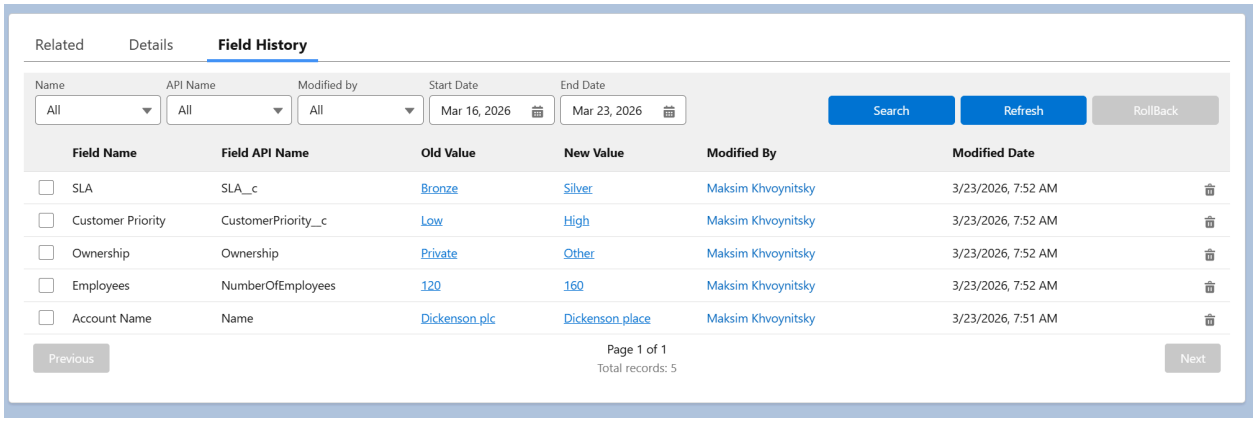
4. **Save the Changes:**
   • In the upper right corner, click **Save** to apply the changes.

Now, the **True Field History** component will appear on the page of each **Contact** (or whichever object you applied it to).

> **Important**: These actions need to be repeated for each object whose changes you want to track.

Main Application Window Overview

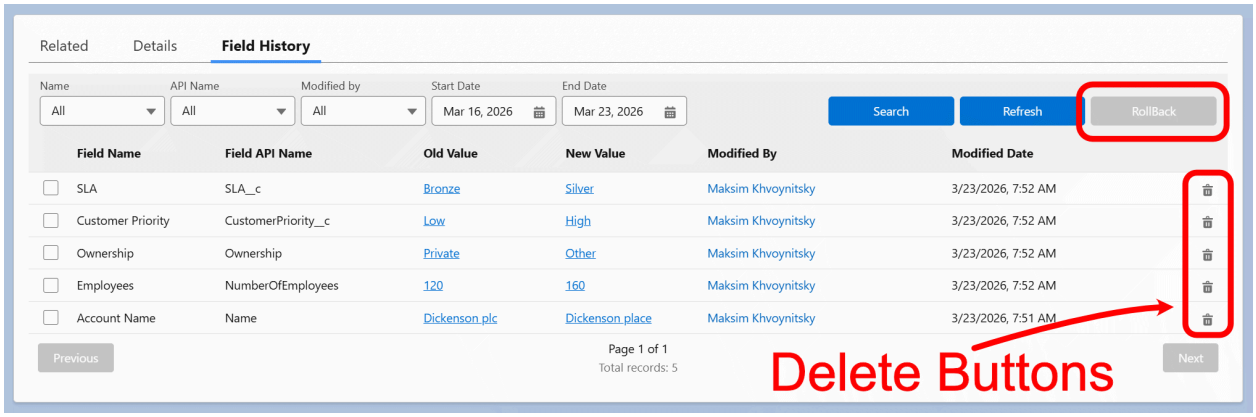
This is the **main application window** where you can view a detailed history of all changes.



Key Data Columns:

- **Field Name**: Name of the field that was changed.
- **Field API Name**: Technical API name of the field.
- **Old Value**: The value of the field before the change.
- **New Value**: The updated value after the change.
- **Modified By**: The user who made the change.
- **Modified Date**: Date and time of the change.

Your layout may look slightly different depending on the permission sets assigned to you. If you don't have the **True Field History Rollback Action** permission, the *Rollback* button will not be visible. Similarly, if you don't have the **True Field History Delete Action** permission, the *Delete* buttons will be hidden. Both are highlighted in red in the screenshot below.



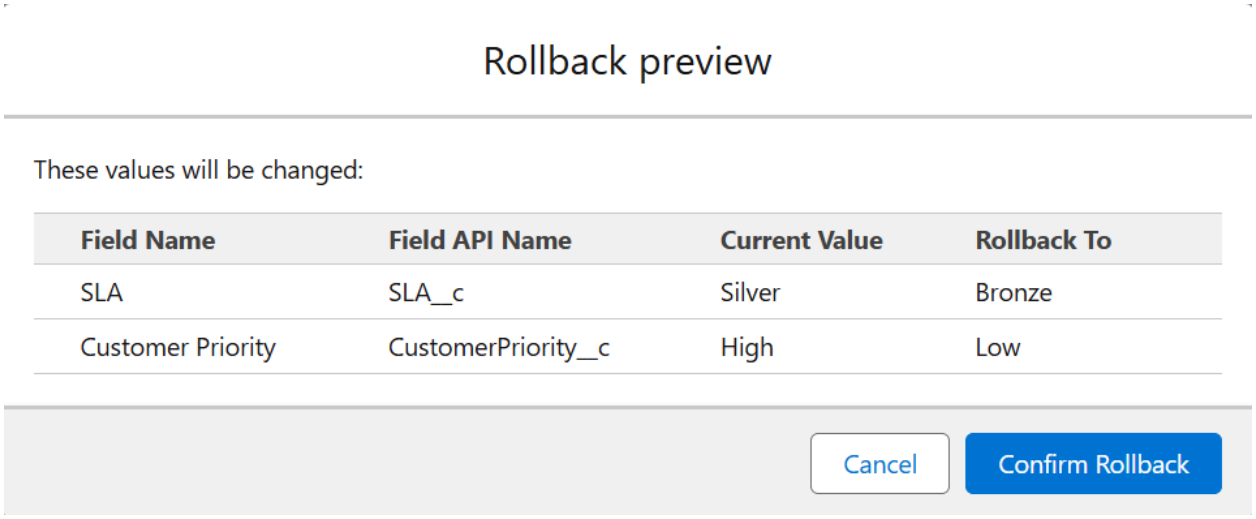
Rollback

The **Rollback** function allows you to revert a field to the value recorded in a specific change history record. This means you can restore a field to any **previous Old Value** captured in the history, depending on which record you select. Note that this functionality is only available if you have the **True Field History Rollback Action** permission.

1. Find the history record with the value you want to restore; you can select several fields at once (one record per field).

2. Click the **RollBack** button.

After that, a modal window will open where you can confirm that you've selected the correct record before performing the rollback.



Delete

The **Delete** function allows you to remove a specific change history record. To delete a record, click the **trash can** icon on the right. The record is deleted immediately, without confirmation, and moved to the Salesforce Recycle Bin. You can delete only history records that you own; administrators can delete any record. Note that this functionality is only available if you have the **True Field History Delete Action** permission.

Filters

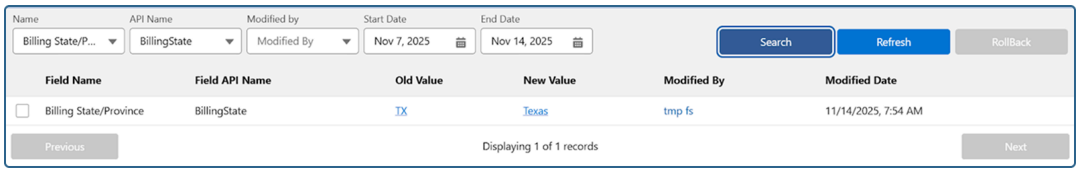
If you want to find specific changes, use the **filters** at the top of the page:

1. Use the filters at the top of the page:

    - **Name**: Filter by field name.
    - **API Name**: Search using the API name.
    - **Modified By**: Filter by the user who made the change.
    - **Start Date / End Date**: Specify a date range for changes.

Note: the **API Name** filter is shown only when the component is placed in a wide area of the page, for example, the main column.

2. Click the **Search** button to apply filters.

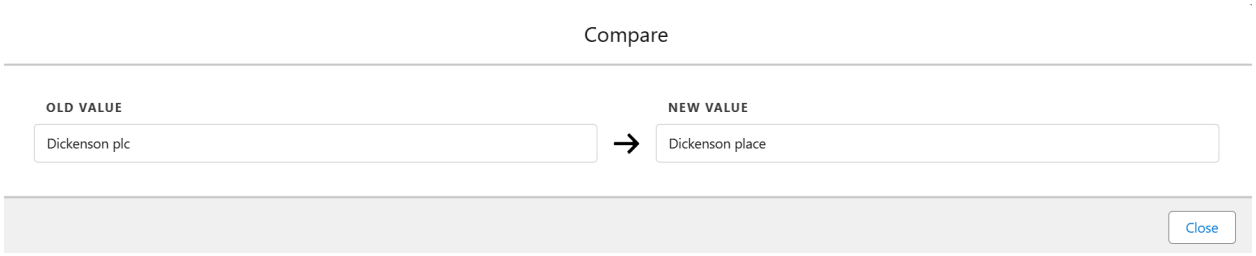


Refresh

To view the most recent changes, you need to click the **Refresh** button or reload the page. This ensures that any updates made to the object fields are properly displayed in the application.

Additional Tips

Old Value and **New value** are clickable. When you click on any of them, you will see comparison of this values in modal



If there are **more than 15 records** in True Field History, use the **Next** and **Previous** buttons to navigate through all entries.



By default, the application records data for **the last 7 days**. If you want to view changes outside this default period, you can use the **Start Date** and **End Date** filters to select any timeframe you need.

True Field History Standard Migration

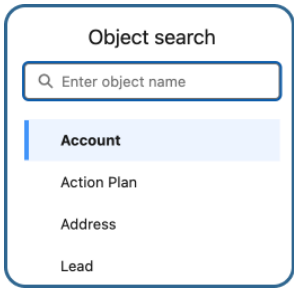
If you have been using Salesforce's Standard Field History Tracker, you can now easily migrate that data into the **True Field History** application without losing any information.

Steps for Migration:

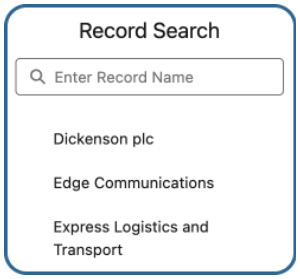
1. **Open the True Field History Standard Migration Window**



2. **Select the Object**
   Use the **Object Search** bar to find the object (e.g., **Account**) you want to migrate data for.



3. **Select the Record**
   Use the **Record Search** bar to locate the specific record you want to migrate.



   If the record is not in the list, search for it or click **Show more** to load more records.
4. **View Standard History**
   The **Standard History Search** panel will display changes tracked by the standard field history feature.



5. **Select Records to Migrate**
   Check the boxes next to the field history records you wish to migrate. History records that were already migrated can't be selected again.
6. **Migrate Data**
   Click the **Migrate** button to transfer the selected records to **True Field History**.

To migrate all standard field history of the selected object at once, check **Migrate entire object** and click **Migrate**. The migration runs in the background; you can monitor it in **Setup → Apex Jobs** (the notification

shown after the start contains a link). History records that were already migrated are skipped, so you can safely run the migration again.

To reset filters and return to the default view, click the **Refresh** button.



You're Ready to Track Changes Effectively!
Now that you've learned the full functionality of **True Field History**, you're all set to track changes efficiently and keep your data under control.

Extended Plan and Customization

True Field History is highly adaptable and can be extended to better fit your workflow. The **True Field History Extended Plan** adds the following features:

- **Data management: export, import and mass deletion of field history.**
- **Storage integrations: store historical field data outside of Salesforce in Google Drive, OneDrive or Amazon S3, helping reduce storage costs while maintaining easy and secure access to your data.**
- **Deleted records: restore deleted records with their field values or delete them permanently.**

You may see the **True Field History Data Management** and **True Field History Deleted Records** tabs in the App Launcher. These tabs are part of the Extended Plan: without it, they show a message instead of the feature.

If you need something specific to your business, we can also build custom functionality on individual terms. If you're interested in the Extended Plan or any other customization, please reach out to us.

Contact Us

Need Help or Have Questions?
If you have questions about **True Field History** or need assistance, don't hesitate to reach out! Our dedicated support team is here to help you every step of the way. Whether you need guidance on using a feature, encounter a technical issue, or want to share your feedback, we're just an email away.

Contact us anytime at **help@truesolv.com**, and we'll respond as soon as possible.

Have Questions About Salesforce? Get expert advice from the TrueSolv team, not only on True Field History: implementation, customization, integrations and more. Write to us at **hello@truesolv.com**.

Your satisfaction is our top priority, and we're committed to ensuring you have a smooth and productive experience with True Field History.

Thank you for choosing True Field History!

Warm regards,
TrueSolv Team