



True Field History 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.

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.

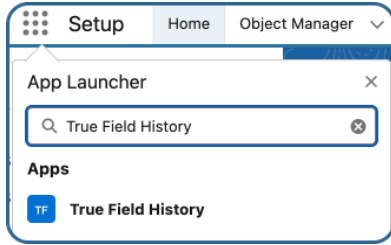
6. Log in to Salesforce:

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

⚠️ Note for existing installations

If you have previously installed True Field History, please **uninstall** all existing versions of the app before installing the latest version. Installing the new version without removing the previous one may cause configuration issues and prevent the application from functioning correctly.

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.

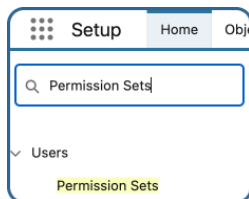
The most important is that an **Admin Permission Set** is required, if you want to have access to configuration.

Permission Set Assignment

Use this instruction to assign the appropriate permission set based on the user's role. Depending on their role, users may be assigned admin or standard user permissions within True Field History.

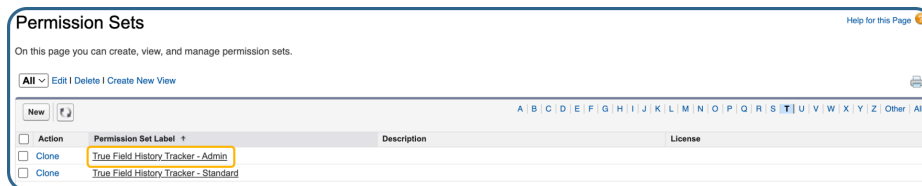
1. Managing Permission Sets:

- 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 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.

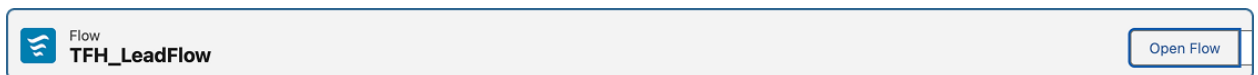
Option 2: Activate flows manually

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. Click on a flow to open its details, then click **Open Flow** in the top-right corner.



5. Click **Activate**

Once activated, the configuration will start working immediately.

True Field History Configuration

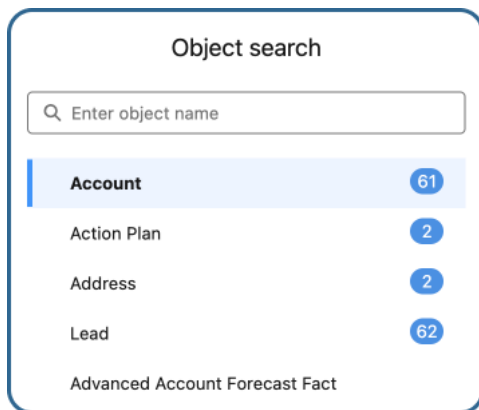
Before you can start tracking changes to fields in Salesforce, you need to configure the required objects and fields. Follow these steps:

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.

Field search

☐	Name	API Name	Data Type
☒	Account Description	Description	TEXTAREA
☒	Account Fax	Fax	PHONE
☒	Account ID	Id	ID
☒	Account Name	Name	STRING

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.

☒
Enable Field History Tracking

Save

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 Flow in the list should be your True Field History configuration
- The Flow name follows this pattern:
TFH_<ObjectName>Flow
 For example, for the Account object: TFH_AccountFlow

If this Flow is present, your setup has been completed successfully.

Flows

All Flows

47 Items • Sorted by Last Modified Date • Updated a few seconds ago

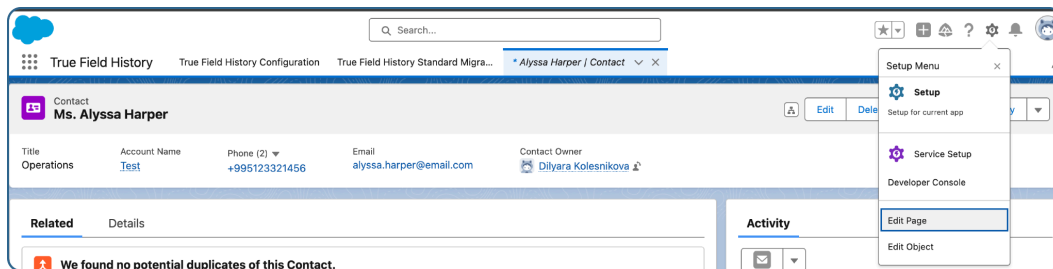
	Flow Label	Flow Type	Prog...	A...	Description	Last Modified Date
1	TFH_AccountFlow	Record-Triggered A...	Activated			14.11.2025, 19:27
2	Update Flow Definition Vers...	Autolaunched No T...	Activated		Updates the status of a flow definition version to Draft, UnderReview, or Active ...	11.10.2025, 11:28
3	Cancel All Eligible Items Flow	Screen Flow	Draft		Order Management: Cancel all eligible order items before fulfillment.	11.10.2025, 11:28
4	Request Flow Activation	Autolaunched Flow ...	Activated		Submits a flow for activation approval by a reviewer. Approved flows are activ...	11.10.2025, 11:28
5	Review Flow for Activation	Screen Flow	Activated		Directs the flow user to review the submitted flow in Flow Builder, displays addi...	11.10.2025, 11:28
6	Create Draft Flow Approval	Screen Flow	Activated		Creates a draft flow approval process using information provided by the flow us...	11.10.2025, 11:28
7	Cancel Item Flow	Screen Flow	Draft		Order Management: Cancel order items before fulfillment.	11.10.2025, 11:28
8	Verify Identity	Screen Flow	Activated			11.10.2025, 11:28
9	Recurrence Schedule Flow	Autolaunched No T...	Activated		Flow for creating object items from Recurrence Scheduler Records	11.10.2025, 11:28
10	Generate Payment Link	Screen Flow	Activated			11.10.2025, 11:28
11	CMS: Notify Content Author	Screen Flow	Activated		Notifies the content author that their content variant has been approved, and al...	11.10.2025, 11:28
12	Return Item Flow	Screen Flow	Draft		Order Management: Return order items after fulfillment.	11.10.2025, 11:28
13	Check Session Flow Eligibility	Autolaunched No T...	Draft		Checks whether a messaging session meets the eligibility criteria to generate a	11.10.2025, 11:28

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.

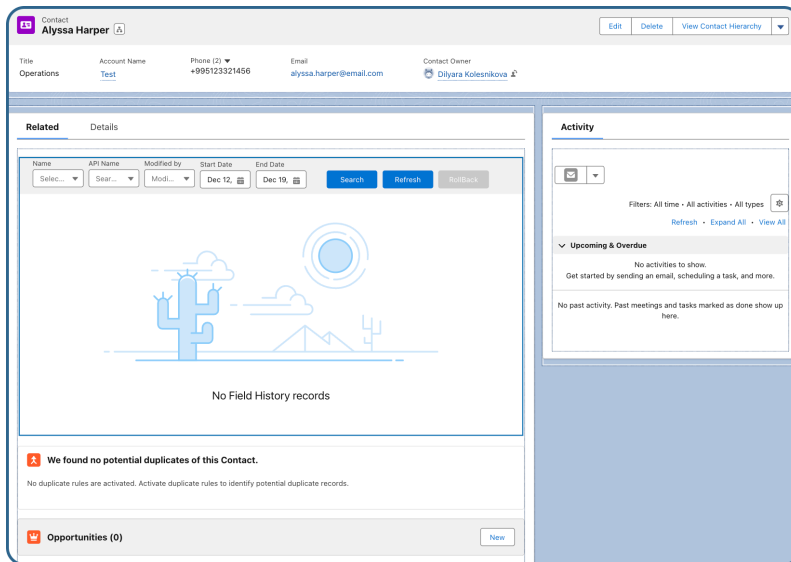


2. **Add the True Field History Component:**
 - In the page layout editor, locate the **True Field History** component in the left column under **Components**.

▼ Custom (1)

 True Field History

- 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.

Name	API Name	Modified by	Start Date	End Date			
Select Field N...	Search Field A...	Modified By	Nov 7, 2025	Nov 14, 2025	Search	Refresh	RollBack
Field Name	Field API Name	Old Value	New Value	Modified By	Modified Date		
☐ Account Name	Name	Edge Communications	Edge not Communicating	tmp fs	11/14/2025, 7:54 AM		
☐ Billing State/Province	BillingState	TX	Texas	tmp fs	11/14/2025, 7:54 AM		
Previous		Displaying 2 of 2 records				Next	

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.

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

Compare	
OLD VALUE Edge Communications	NEW VALUE Edge not Communicating
Close	

If there are **more than 10 records** in True Field History, use the **Next** and **Previous** buttons to navigate through all entries.

Previous	Displaying 10 of 11 records	Next
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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.

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

Name	API Name	Modified by	Start Date	End Date		
Billing State/P...	BillingState	Modified By	Nov 7, 2025	Nov 14, 2025	Search	Refresh
					RollBack	
Field Name	Field API Name	Old Value	New Value	Modified By	Modified Date	
☐ Billing State/Province	BillingState	TX	Texas	tmp fs	11/14/2025, 7:54 AM	
Previous		Displaying 1 of 1 records			Next	

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.

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.

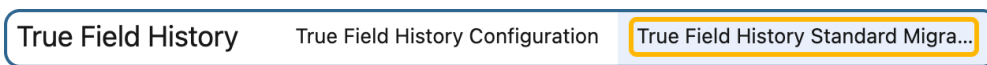
1. Find the history record with the value you want to restore.
 2. Click the **RollBack** button.
-

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.

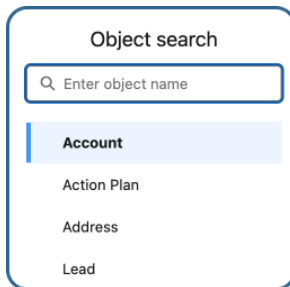
Steps for Migration:

1. Open the True Field History Standard Migration Window



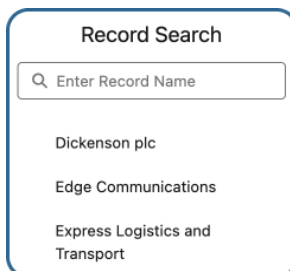
2. Select the Object

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.



4. View Standard History

The **Standard History Search** panel will display changes tracked by the

standard field history feature.

Standard History Search				
Enter field name				
☐ Field	Old Value	New Value	Modified By	Modified Date
☒ Name	University of Arizona 456	University of Arizona 567	Damir Tarikh	2024-12-10 08:17:13

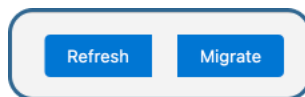
5. Select Records to Migrate

Check the boxes next to the field history records you wish to migrate.

6. Migrate Data

Click the **Migrate** button to transfer the selected records to **True Field History**.

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.

Additional Features or Customization

True Field History is highly adaptable to your needs! If you require any additional features or customization to better suit your workflow, we're happy to discuss how we can tailor the app to your specific requirements.

As one of the options, we can provide an **optional Google Drive integration**, allowing you to store your historical field data outside of Salesforce. This helps reduce reliance on expensive Salesforce storage while ensuring easy access to your data. If you're interested in this integration or have any other customization requests, please reach out!

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.

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