



FIELD TRACKER APP

POWERED BY  Algoworks

salesforce



FIELD TRACKER APP

USER GUIDE



Introduction 

The Set Up 

Field Tracking Creation 

Post Installation Steps 

Field Tracking Deletion 

Technical Challenges & Solutions 

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INTRODUCTION

- Field Tracker is a 100% Salesforce native application. Salesforce administrators can now have a single interface to manage fields' data tracking for up to 40 standard and 40 custom objects on a single interface.
- The admins can track the history of any changes that are made in objects by showing the previous, as well as, the updated value. The admins can also dynamically configure any object by mixing standard and custom, both.
- To track the changes that happened in the field, all you need to do is to select a certain field to track and display field history in the history related list of an object.





DETAILED UNDERSTANDING OF CONCEPTS



1. Install Managed package in your ORG
2. Manage Field tracker licenses and permissions
3. Add remote site settings
4. Enable tracking for standard & Custom objects
5. Configuring tracking in Salesforce Classic
6. Configuring tracking in Salesforce Lightning
7. Remove Tracking



PART - 1
**Install Managed package
in your ORG**



LOGIN INTO THE ENVIRONMENT - FRONTEND

To begin, the user must login to their salesforce org.
Once the user is logged in the following dashboard appears.

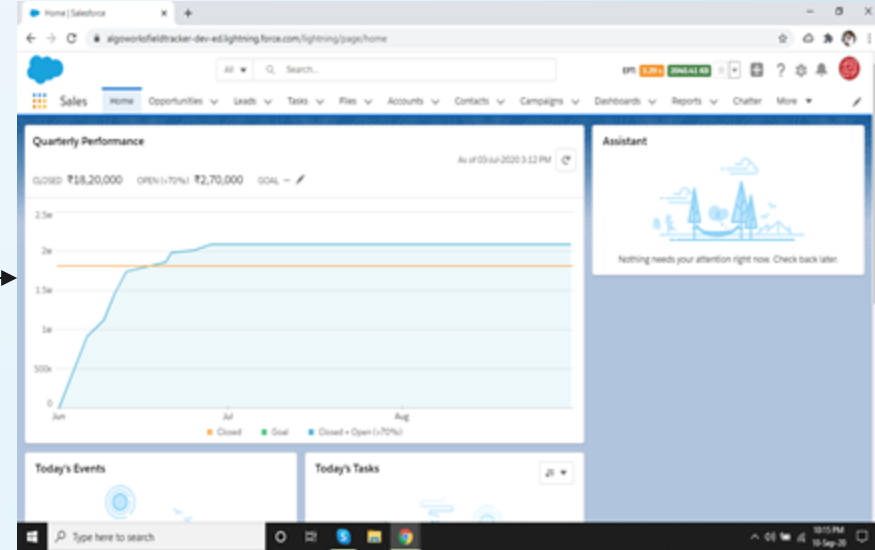
Fill in the user credentials.

User name
(Case sensitive)

Password
(Case sensitive)

Click on login.

The screenshot shows the Salesforce login page. At the top is the Salesforce logo. Below it is a login form with fields for 'Username' and 'Password'. The 'Username' field has a 'Saved Username' link. Below the password field is a blue 'Log In' button. There is a 'Remember me' checkbox and a 'Forgot Your Password?' link. At the bottom, it says '© 2020 salesforce.com, Inc. All rights reserved.'





INSTALL MANAGED PACKAGE IN YOUR ORG



Install Field Tracker

By Algoworks Solutions Inc


☒ Install for Admins Only


☐ Install for All Users


☐ Install for Specific Profiles...

 You're installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

☐ I acknowledge that I'm installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

Install

Cancel

App Name	Publisher	Version Name	Version Number
Field Tracker	Algoworks Solutions Inc	Field Tracker	1.0

Click on Install

Install Field Tracker

By Algoworks Solutions Inc

 Installation Complete

Once the installation is complete, click on **done**.

Done

App Name	Publisher	Version Name	Version Number
Field Tracker	Algoworks Solutions Inc	Field Tracker	1.0

Description

www.algoworks.com Field Tracker is a 100% Salesforce native application. Salesforce administrator now has a single interface to manage fields' data tracking. Your organization compliance to various data policies and regulations is easy to support!!

PART 1

Install the Managed Package In Your





INSTALL MANAGED PACKAGE IN YOUR ORG



Install Field Tracker

By Algoworks Solutions Inc

Installation Complete!

Once the installation is complete, click on **done**.

Done

App Name	Publisher	Version Name	Version Number
Field Tracker	Algoworks Solutions Inc	Field Tracker	1.0

Description

www.algoworks.com Field Tracker is a 100% Salesforce native application. Salesforce administrator now has a single interface to manage fields' data tracking. Your organization compliance to various data policies and regulations is easy to support!!

PART 1
Install the Managed Package In Your

Installed Packages

Click on **Field Tracker** given under **Installed Packages**.

Action	Package Name	Publisher	Version Number	Release Name	Install Date	Limits	Apps	Tab	Objects	AppExchange New
Uninstall	Field Tracker	Algoworks Solutions Inc	1.0	FieldTracker	9/25/2023, 1:41:48	✓	1	0	4	Not Passed

Uninstalled Packages

No uninstalled package data archives

PART 1
Install the Managed Package In Your





INSTALL MANAGED PACKAGE IN YOUR ORG

salesforce

my-org-domain-dev-ed.lightning.force.com/lightning/setup/Impo

Search Setup

Setup Home Object Manager

Installed Packages

Package Details
Field Tracker (Managed)

Back to List Users

Installed Package Detail

Uninstall View Components Become Primary Contact View Dependencies

Package Name	Field Tracker	Version Number	1.0
Language	English	First Installed Version Number	1.0
Version Name	Field Tracker	Package Type	Managed
Namespace Prefix	FieldTracker	Modified By	Algoworks Admin 9/25/2020, 1:41 AM
Publisher	Algoworks Solutions Inc.		
Description	This app provides the facility to track the changes that happened to the fields of custom and standard objects		
Installed By	Algoworks Admin 9/25/2020, 1:41 AM		
Count Towards Limits	✓	Tabs	5
Apps	1	Objects	4

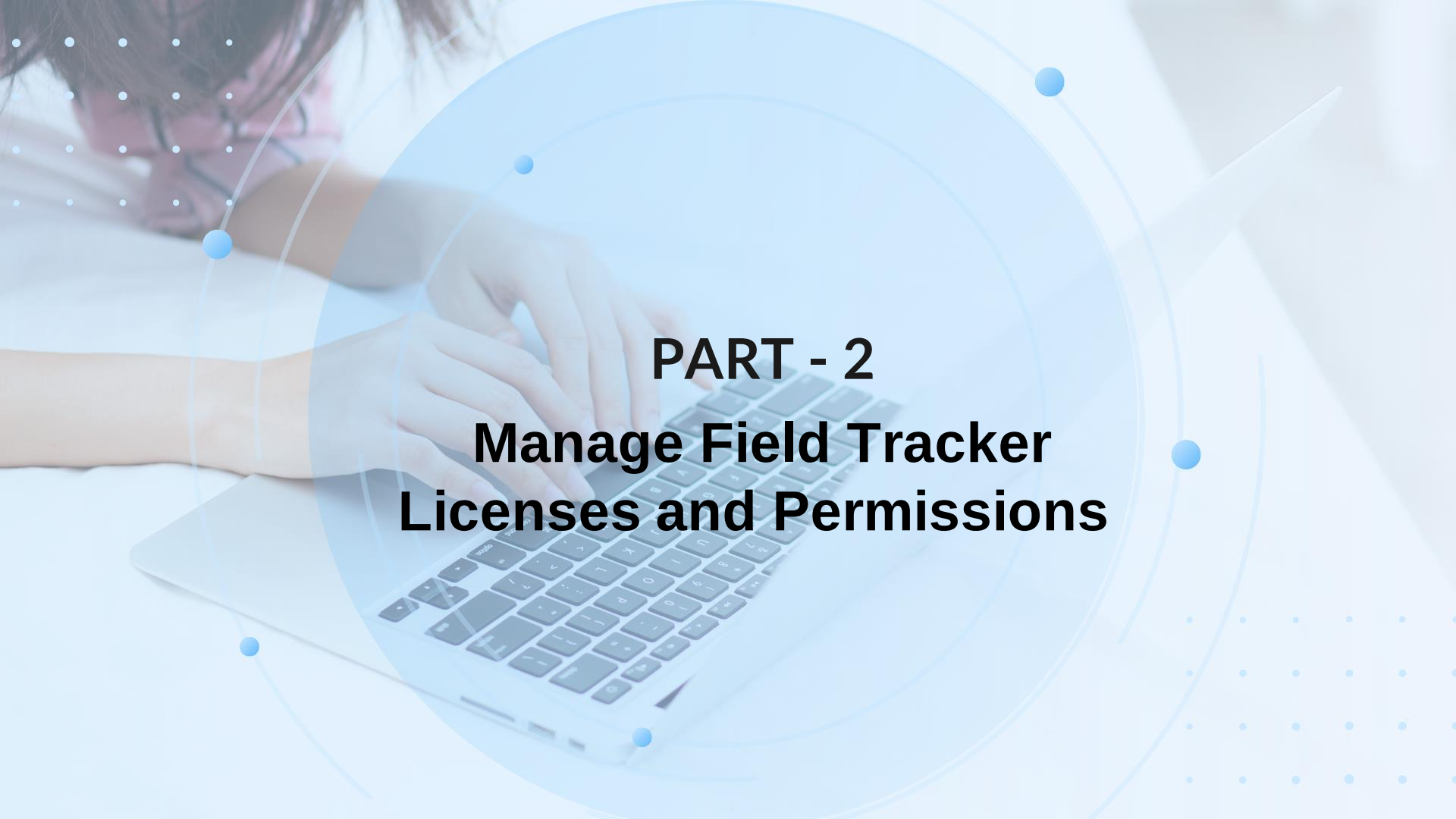
Algoworks

PART 1
Install the Managed Package In Your

Voila!
You will be able to view
the installation details
of the package.

Tracking of Custom
and standard objects





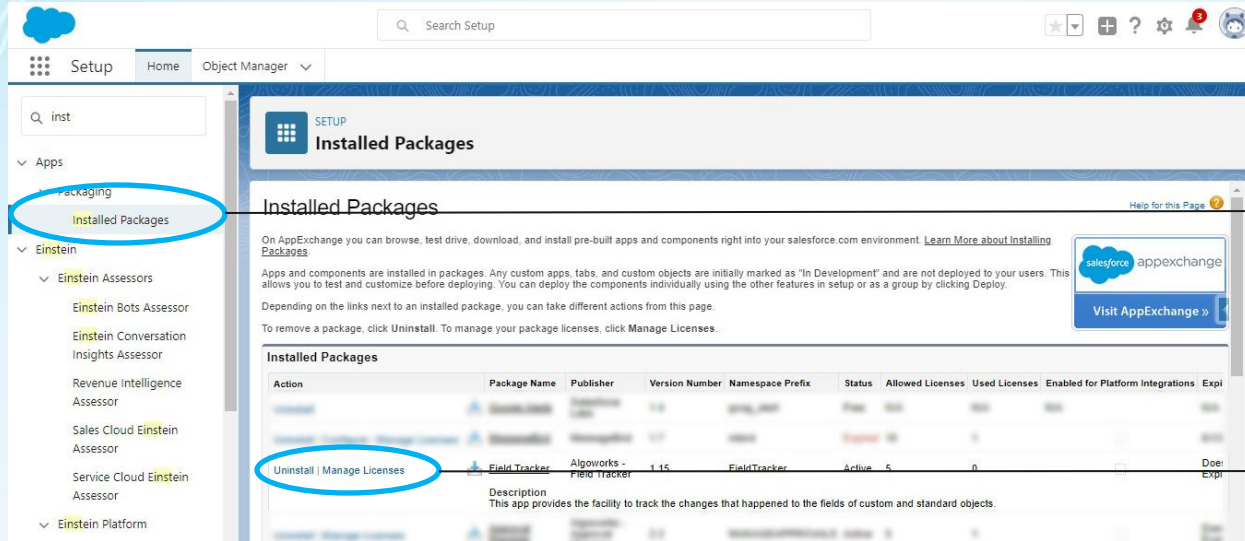
PART - 2

Manage Field Tracker Licenses and Permissions



MANAGE FIELD TRACKER LICENSES AND PERMISSIONS

Give permission including Field tracker configuration page for System Administrator profile user: -
This permission will include access to our Field tracker configuration page and a view of the tracking record history log records. This configuration page can be accessible by the System Administrator profile user.





MANAGE FIELD TRACKER LICENSES AND PERMISSIONS



Search Setup

Setup Home Object Manager

inst

Apps

- Packaging
- Installed Packages
- Einstein
 - Einstein Assessors
 - Einstein Bots Assessor
 - Einstein Conversation Insights Assessor
 - Revenue Intelligence Assessor
 - Sales Cloud Einstein Assessor
 - Service Cloud Einstein Assessor
 - Einstein Platform

Package Manager

Package Details

Field Tracker

[Back to Previous Page](#)

[Enable for Platform Integrations](#)

Package Name	Field Tracker	Publisher	Algoworks - Field Tracker
Status	Active	Allowed Licenses	5
Expiration Date	Does not Expire	Used Licenses	0

Enabled for Platform Integrations ☐

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Licensed Users

[Add Users](#) [Remove Multiple Users](#)

Full Name ↑	Role	Active	Profile
No records to display.			

Click on the **Add Users** button in the **Licensed Users** section





MANAGE FIELD TRACKER LICENSES AND PERMISSIONS



Setup Home Object Manager

inst

Apps

Packaging

Installed Packages

Einstein

Einstein Assessors

Einstein Bots Assessor

Einstein Conversation Insights Assessor

Revenue Intelligence Assessor

Sales Cloud Einstein Assessor

Service Cloud Einstein Assessor

Einstein Platform

Einstein Bots

Einstein.ai

Package Manager

Add Users

Field Tracker

View: All Create New View

Available Users

Action	Full Name	Role	Active	Profile
☐	[Redacted]	CEO	☐	System Administrator
☐	[Redacted]	CEO	☒	Client System Admin
☒	[Redacted]	CEO	☒	System Administrator
☐	[Redacted]	[Redacted]	☒	Partner Community User
☐	Test		☒	Customer Community Login User

Show me more records per list page

Selected Users

Action	Full Name
☒	[Redacted]

Add Cancel

- 1: Select **System Administrator** profile user
- 2: Click on the **Add** button in the **Selected Users** section





MANAGE FIELD TRACKER LICENSES AND PERMISSIONS

Give permission for another profile user: -

This permission will include access and a view of the records of field history tracking log.

Search Setup

Setup Home Object Manager

Q inst

Apps

Packaging

Installed Packages

Einstein

Einstein Assessors

Einstein Bots Assessor

Einstein Conversation Insights Assessor

Revenue Intelligence Assessor

Sales Cloud Einstein Assessor

Service Cloud Einstein Assessor

Einstein Platform

SETUP Installed Packages

Installed Packages

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click Uninstall. To manage your package licenses, click Manage Licenses.

Visit AppExchange »

Installed Packages

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Enabled for Platform Integrations	Expi
Uninstall Manage Licenses	Field Tracker	Algoworks - Field Tracker	1.15	FieldTracker	Active	5	0		Doer Expi

Description
This app provides the facility to track the changes that happened to the fields of custom and standard objects.

- 1 - Type **Installed packages** in the quick find box
- 2 - Open **Installed packages** page
- 3 - Click on **Manage Licenses** link in front of **Field Tracker** application name.





MANAGE FIELD TRACKER LICENSES AND PERMISSIONS



The screenshot shows the Salesforce Package Manager interface. On the left is a navigation sidebar with a search bar containing 'inst' and a list of categories: Apps, Packaging, Einstein, Einstein Assessors, Einstein Bots Assessor, Einstein Conversation Insights Assessor, Revenue Intelligence Assessor, Sales Cloud Einstein Assessor, Service Cloud Einstein Assessor, and Einstein Platform. The main content area is titled 'Package Manager' and shows details for the 'Field Tracker' package. It includes a table with the following data:

Package Name	Field Tracker	Publisher	Algoworks - Field Tracker
Status	Active	Allowed Licenses	5
Expiration Date	Does not Expire	Used Licenses	0

Below the table is a section titled 'Licensed Users' with a table that has columns for 'Full Name', 'Role', 'Active', and 'Profile'. The table is currently empty, showing 'No records to display.' Above this table are two buttons: 'Add Users' and 'Remove Multiple Users'. The 'Add Users' button is circled in blue. An arrow points from a text box on the right to this button.

Click on the **Add Users** button in the **Licensed Users** section





MANAGE FIELD TRACKER LICENSES AND PERMISSIONS

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The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with 'Setup' and 'Object Manager'. The main content area is titled 'Package Manager' and 'Field Tracker'. It includes a search bar, a 'View' dropdown, and a 'Create New View' button. Below this is a table of 'Available Users' with columns for 'Action', 'Full Name', 'Role', 'Active', and 'Profile'. A checkbox in the 'Action' column is selected. Below the table is a 'Selected Users' section with a table of 'Selected Users' and an 'Add' button. A checkbox in the 'Action' column is also selected. Arrows point from these checkboxes to a callout box on the right.

Action	Full Name	Role	Active	Profile
☐	[Redacted]	CEO	☐	System Administrator
☒	[Redacted]	CEO	☒	Clone System Admin
☐	[Redacted]	CEO	☒	System Administrator
☐	[Redacted]	[Redacted]	☒	Partner Community User
☐	Test		☒	Customer Community Login User

Action	Full Name
☒	[Redacted]

- 1: Select any profile user whom you want to give access.
- 2: Click on the **Add** button in the **Selected Users** section



A person's hands are shown typing on a silver laptop keyboard. The image is overlaid with a large, semi-transparent blue circle. Several small blue dots are scattered around the circle, and a grid of white dots is visible in the top-left and bottom-right corners. The text "PART - 3" and "Add Remote Site Settings" is centered over the image.

PART - 3

Add Remote Site Settings



ADD REMOTE SITE SETTINGS



Install Field Tracker

By Algoworks Solutions Inc

Installation Complete!

Once the installation is complete, click on **done**.

Done

App Name	Publisher	Version Name	Version Number
Field Tracker	Algoworks Solutions Inc	Field Tracker	1.0

Description

www.algoworks.com Field Tracker is a 100% Salesforce native application. Salesforce administrator now has a single interface to manage fields' data tracking. Your organization compliance to various data policies and regulations is easy to support!!

PART 1
Install the Managed Package In Your

Remote Site Settings

All Remote Sites

Below is the list of Web addresses that you have added. To add a new Web address, click New Remote Site.

View: **All Remote Sites** [Click here to add](#)

Action	Remote Site Name	Namespace Prefix	Remote Site URL	Active	Created By	Created Date	Last Modified By	Last Modified Date
Edit Delete	App Developer	-	http://www.algoworks.com	☒	Admin - Algoworks	9/25/2023 12:23 AM	Admin - Algoworks	9/25/2023 12:23 AM

Click on New Remote Site.

PART 2
Add Remote Site Settings

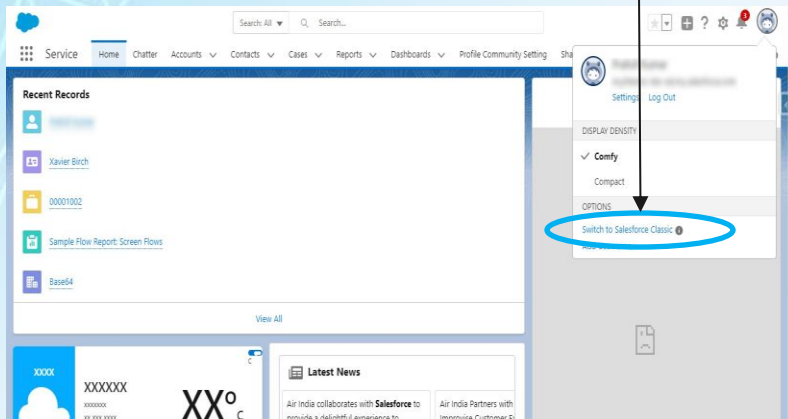




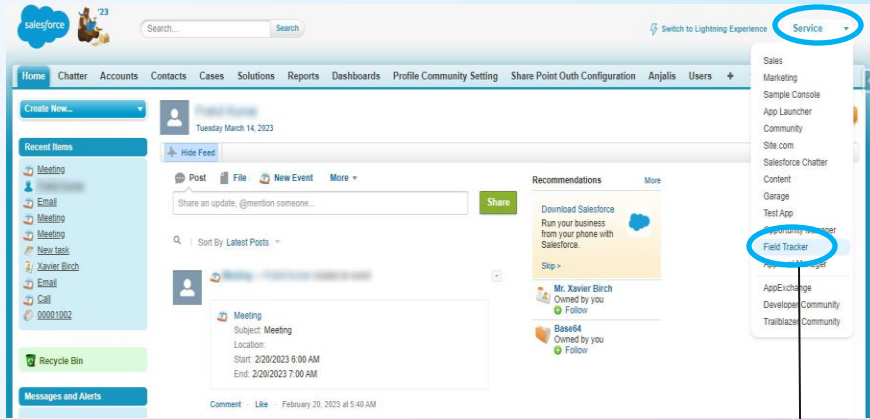
ADD REMOTE SITE SETTINGS



Switch to -
Salesforce Classic Mode



Click on
Service

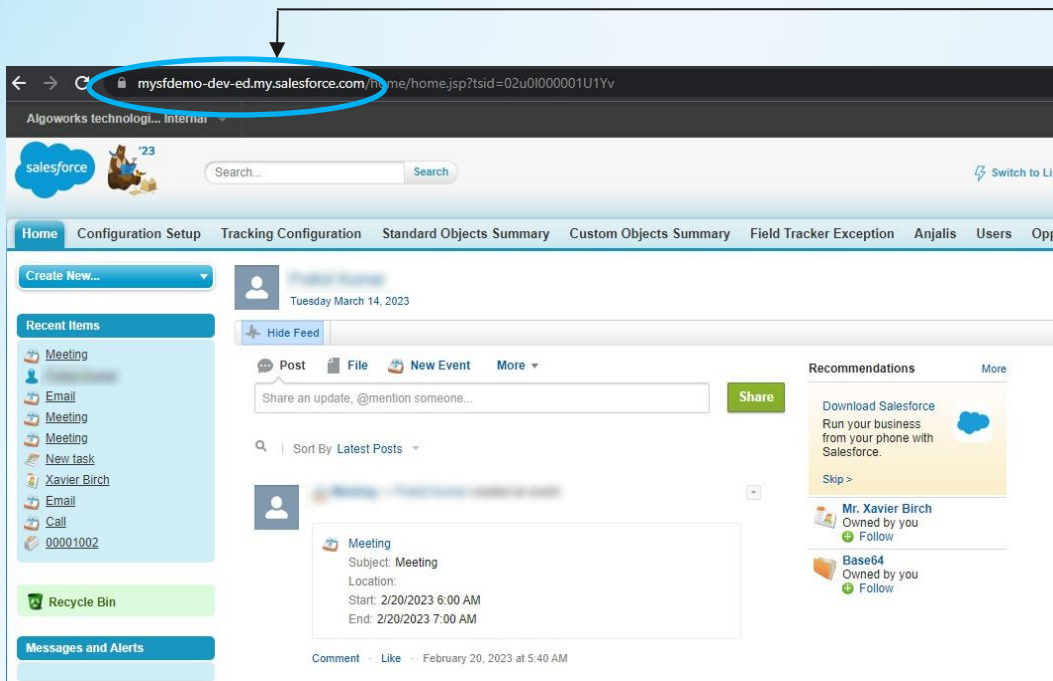


Select "**Field Tracker**"
from the options.





ADD REMOTE SITE SETTINGS



Copy the base domain value as highlighted.





ADD REMOTE SITE SETTINGS



Replace *<Domain Name>* in the *Remote site URL* with the copied value.

Remote Site Name: FieldTracker

Remote Site URL: https://my-org-domain-dev-ed-1618tracker.visualforce.com

Disable Protocol Security: ☐

Description:

Active: ☒

Buttons: Save | Save & New | Cancel

Post changing the domain name in the remote URL, Click on save

Yay! You have now successfully completed the remote site settings.

Remote Site Details

Back to List Items

Remote Site Detail

Buttons: Edit | Delete | Clone

Modified By: [Srinivasa Arjun](#) 9/25/2020, 3:23 AM

Remote Site Name: FieldTracker

Remote Site URL: https://my-org-domain-dev-ed-1618tracker.visualforce.com

Disable Protocol Security: ☐

Description:

Active: ☒

Created By: [Srinivasa Arjun](#) 9/25/2020, 3:23 AM

Buttons: Edit | Delete | Clone



The background image shows a person's hands typing on a silver laptop. A large, semi-transparent blue circle is centered over the laptop. Several small blue dots are scattered around the circle, some connected by thin white lines, creating a network-like pattern. The overall aesthetic is clean and modern, with a focus on technology and data.

PART - 4

Enable tracking for standard & Custom objects



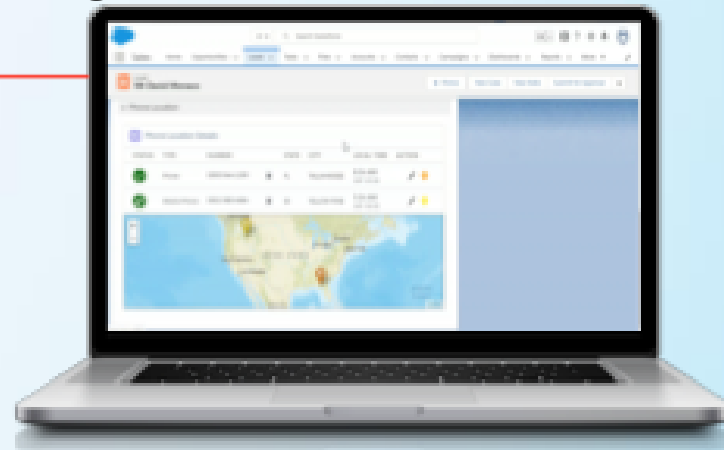
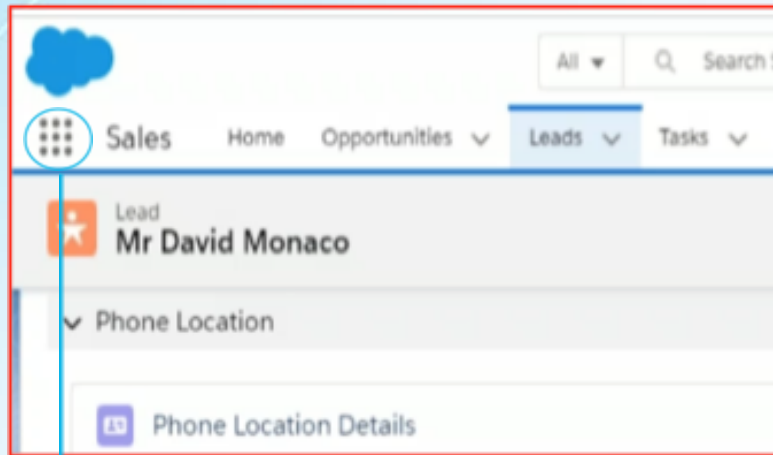
PART – 4.1

Standard Object: Account

With Custom Fields

ENABLE TRACKING FOR STANDARD OBJECTS WITH CUSTOM FIELDS

salesforce



After logging into the Salesforce org, Next step is to click "**App Launcher**" - a grid of nine dots at the top left of your home screen.

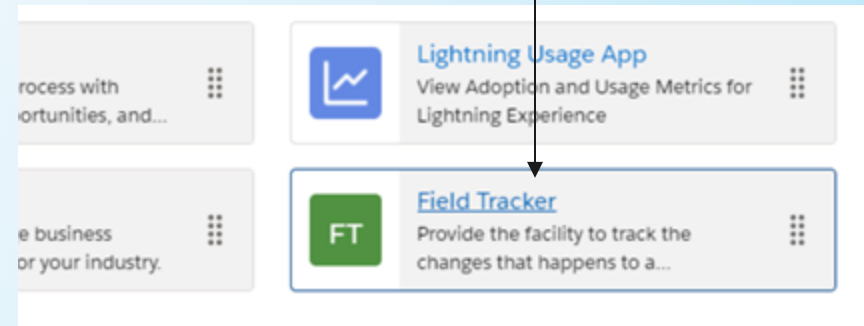
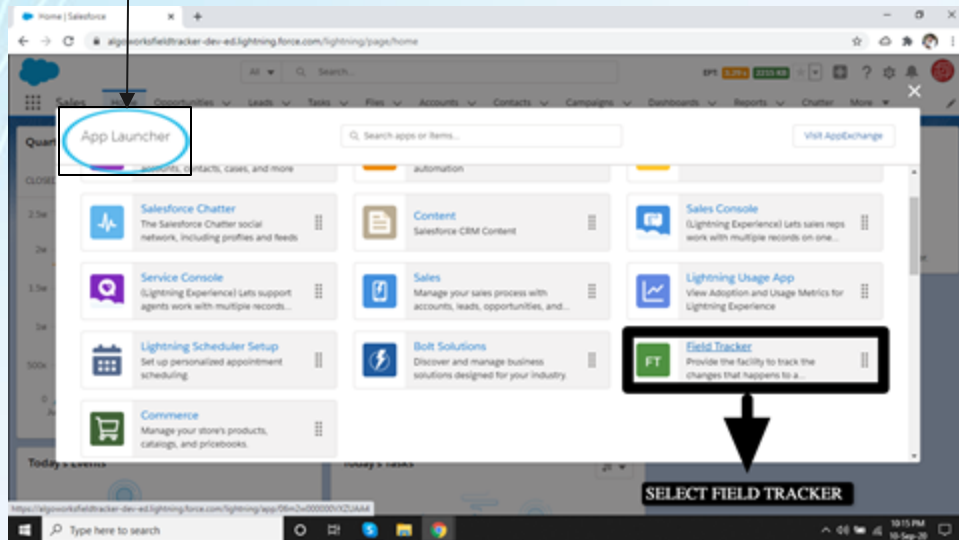


ENABLE TRACKING FOR STANDARD OBJECTS WITH CUSTOM FIELDS

salesforce

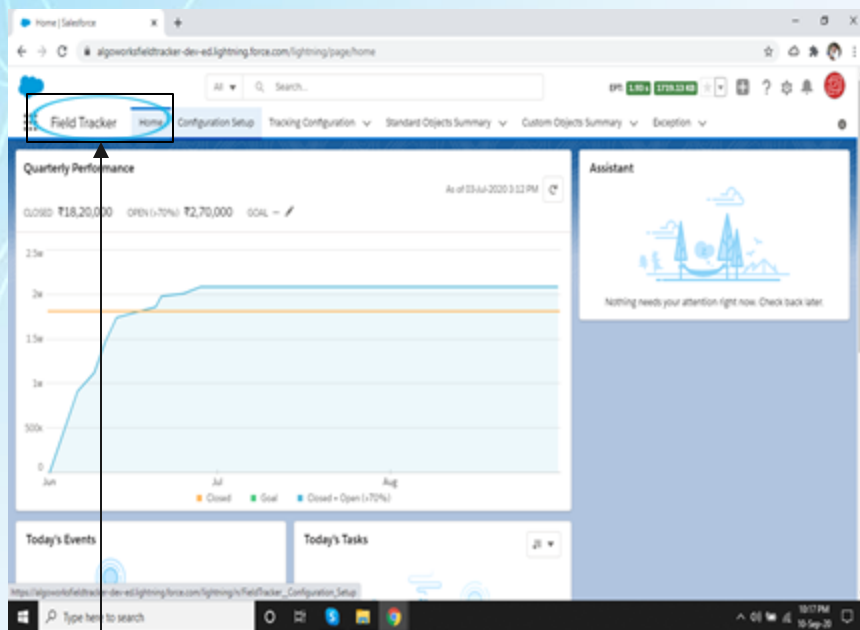
In App Launcher find Field Tracker

Select Field Tracker

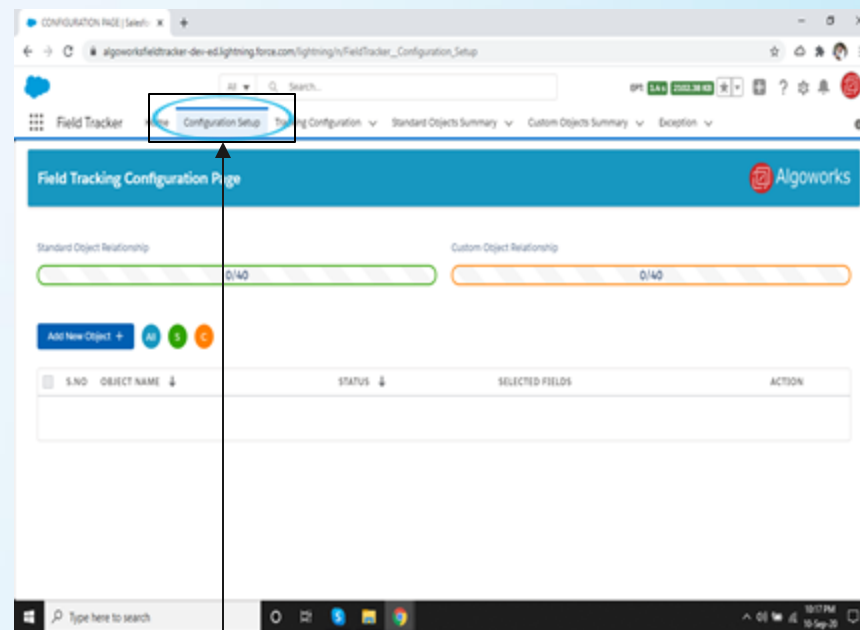




FIELD TRACKER HOME PAGE



Once the Field Tracker app is selected from the app's menu, It would then take the user to the Field tracker Home page.



FIELD TRACKER –
CONFIGURATION SETUP.
Click on configuration Tab.

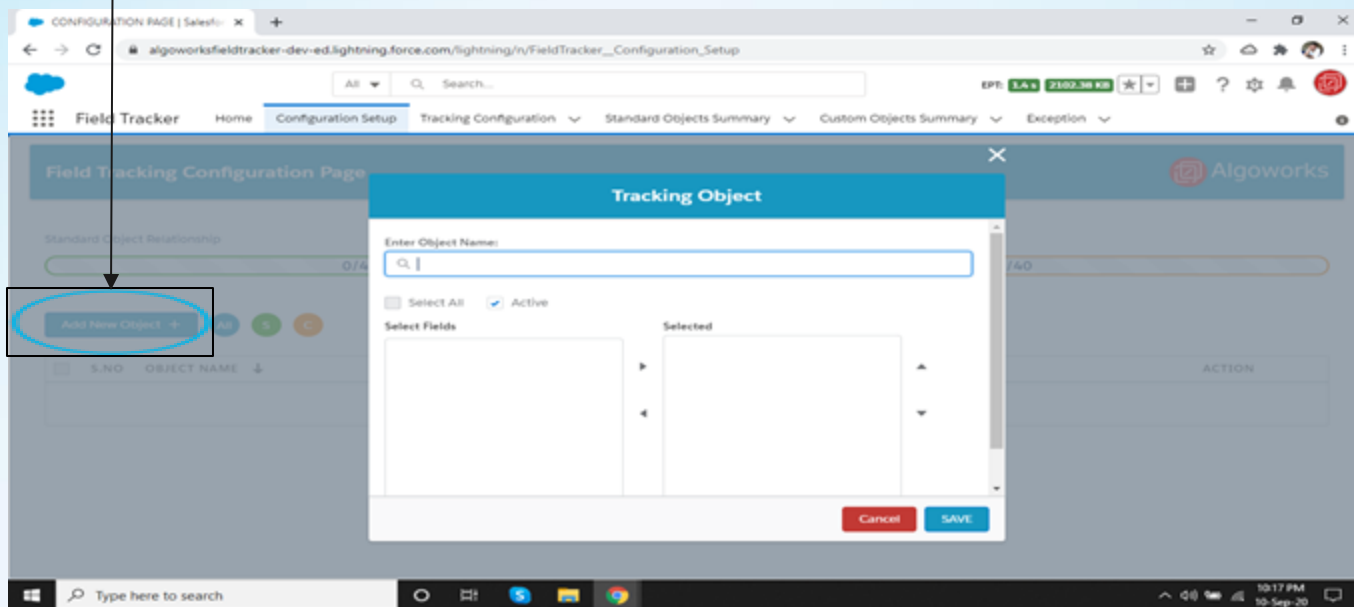




ADD A TRACKING OBJECT

To add new tracking object,
Click on add a new tracking
object.

The following tab opens which
would enable to add a
Standard on a custom Object.





ADD A TRACKING OBJECT AND SELECT A THE OBJECT

Fill in the required details –
object name and select the
fields that needs to be
tracked.

Field Tracking Configuration Page

Tracking Object

Enter Object Name:

Account

☐ Select All ☒ Active

Select Fields

Account Description

Account Fax

Account Name

Account Number

Account Phone

Account Rating

Selected

Cancel Save

Add the required tracking
object

Field Tracking Configuration Page

Tracking Object

Enter Object Name:

Account

☐ Select All ☒ Active

Select Fields

Account

Attachment

Asset

Apex Text Queue Item

Account Contact Role

Assigned Resource

Asset File

Selected

Cancel Save





SELECT THE REQUIRED FIELDS

Select Active option

Select all the required fields for the custom object that needs to be tracked and click on the right arrow. Then click on save

The screenshot shows the Salesforce Field Tracker Configuration Setup page. A modal dialog titled "Tracking Object" is open. In the dialog, the "Enter Object Name:" field contains "Account". Below this, there are two checkboxes: "Select All" (unchecked) and "Active" (checked). The "Select Fields" section on the left lists various fields for the "Account" object, including "Account Description", "Account Fax", "Account Phone", "Account Rating", "Account Site", and "Account Source". The "Selected" section on the right shows the fields that have been added to the tracking list: "Account Name", "Account Number", "Account Type", "Active", "Annual Revenue", and "Owner ID". A right-pointing arrow is visible between the "Select Fields" and "Selected" sections. At the bottom of the dialog, there are "Cancel" and "SAVE" buttons. The background shows the Salesforce interface with the "Field Tracker" tab selected.





POST - SETUP : STANDARD OBJECT



Post set up, The standard object appears on the screen.

Field Tracking Configuration Page

Standard Object Relationship: 1/40

Custom Object Relationship: 0/40

Add New Object + All S C

☐	S.NO	OBJECT NAME ↓	STATUS ↓	SELECTED FIELDS	ACTION
☐	1	Account	☒ Active	Account Name,Account Number,Account Type,Active,Annual Revenue,Owner ID	





POST - INSTALLATION STEPS



Configure Object/Fields for Field Tracker

1. Go to the **Field Tracker App**.
2. Click on **Configuration Setup** Tab.
3. Search for **Object Name** to enable field Field Tracker.
4. On selecting Object Name associated **Fields** will appear on the Panel.
5. Select the Fields on the multi select pick list to enable Field Field Tracker on desired fields.
6. Select **All Field** checkbox in case you want to enable tracking on all fields of the object.
7. Select **Active** checkbox to enable tracking on the Object.
8. Click on Save Button to create Tracking Configuration for selected Object.
9. Click the **Add New Object** button and follow the steps from 3 to 8 to enable more Objects for Field Tracker.





TRACKING CONFIGURATION



Now switch to the tracking configuration tab and the Object appears under recently viewed.

The screenshot shows the 'Recently Viewed' tab in the Salesforce Field Tracker interface. The 'Contact' object is listed as the first item in the table. A callout box points to the 'Contact' entry.

	Object Name
1	Contact
2	Opportunity
3	Account
4	Custom_Test_Object_2
5	Custom_Test_Object_1

The screenshot shows the 'Tracking Configuration' tab in the Salesforce Field Tracker interface. It displays a table with 5 items, sorted by Object Name. The table includes columns for Object Name, Active status, All Field Enabled status, Field Set Name, and Lookup Name.

	Object Name	Active	All Field Enabled	Field Set Name	Lookup Name
1	Account	☒	☒	FieldTracker_Account	FieldTracker_Account_c
2	Contact	☒	☐	All Fields are Enabled	FieldTracker_Contact_c
3	Custom_Test_Object_1	☒	☐	FieldTracker_Test_Object_1	FieldTracker_Custom_Test_Object_1_c
4	Custom_Test_Object_2	☐	☒	All Fields are Enabled	FieldTracker_Custom_Test_Object_2_c
5	Opportunity	☐	☒	FieldTracker_Opportunity	FieldTracker_Opportunity_c





OBJECT DETAILS - FIELD TRACKING



When Clicked on the object, the details appear. (eg: Who created it, When was it created, Object prefix, Lookup name, ETC).





PART - 4.2

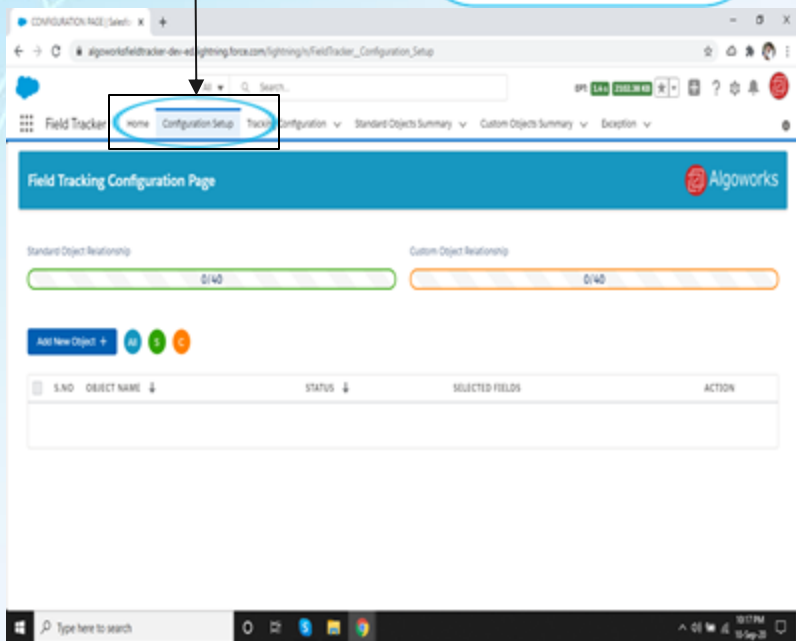
Custom Object: Custom_Object_c

With All Fields



ENABLE TRACKING FOR CUSTOM OBJECT WITH ALL FIELDS

FIELD TRACKER –
CONFIGURATION SETUP.
Click on configuration Tab.





ENABLE TRACKING FOR CUSTOM OBJECT WITH ALL FIELDS

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Field Tracker Home Configuration Setup Tracking Configuration Standard Objects Summary Custom Objects Summary Exception

Field Tracking Configuration Page

Standard Object Relationship 1/40 Custom Object Relationship 1/40

Add New Object + All S C

S.NO	OBJECT NAME	STATUS	ACTION
1	Account	Active	Account Description, Account Name, Account Number, Account Rating, Account Site, Account Type, Active
2	Custom Object	Active	all Fields

Now click on **Save**.

PART 3
Enable Tracking For Standard & Custom Objects
Custom Object : Custom_Object_c (with all fields)



The background image shows a person's hands typing on a silver laptop. A large, semi-transparent blue circle is centered over the laptop. Several small blue dots are scattered around the circle, some connected by thin white lines, creating a network-like pattern. The overall aesthetic is clean and modern, with a focus on technology and digital work.

PART - 5

Configuring tracking in Salesforce Classic

PART – 5.1
**Adding Related List for Accessing
Tracking Record**



ADDING RELATED LISTS FOR ACCESSING TRACKING RECORD

salesforce

Click on **View Object** given under **force.com** from the pop-up.

PART 1
Configuring Tracking In Salesforce Classic
Adding Related List For Accessing Tracking Record

Go to **Page Layouts** under the **Accounts** tab.

PART 1
Configuring Tracking In Salesforce Classic
Adding Related List For Accessing Tracking Record





ADDING RELATED LISTS FOR ACCESSING TRACKING RECORD

salesforce

Click on **Edit**

Account Page Layout

Action	Added By	Modified By	Field Based Layout
ADD: Cst	Algoworks Admin	Algoworks Admin	9/25/2021 12:23 AM
ADD: Cst	Algoworks Admin	Algoworks Admin	9/25/2021 12:23 AM
ADD: Cst	Algoworks Admin	Algoworks Admin	9/25/2021 12:23 AM
ADD: Cst	Algoworks Admin	Algoworks Admin	9/25/2021 12:23 AM

PART 1
Configuring Tracking In Salesforce Classic
Adding Related List For Accessing Tracking Record

Go to **Related Lists**

Account Page Layout

Action	Added By	Modified By	Field Based Layout
ADD: Cst	Algoworks Admin	Algoworks Admin	9/25/2021 12:23 AM
ADD: Cst	Algoworks Admin	Algoworks Admin	9/25/2021 12:23 AM
ADD: Cst	Algoworks Admin	Algoworks Admin	9/25/2021 12:23 AM
ADD: Cst	Algoworks Admin	Algoworks Admin	9/25/2021 12:23 AM

PART 1
Configuring Tracking In Salesforce Classic
Adding Related List For Accessing Tracking Record





ADDING RELATED LISTS FOR ACCESSING TRACKING RECORD

salesforce

Drag & drop **FieldTracker** onto the **Related Lists** section.

Related Lists

- FieldTracker
- Contacts
- Opportunities
- Cases

FieldTracker

Record ID	Sample Text

Contacts

Contact Name	Title	Email	Phone
Sam Sample	Sample Text	sam.sample@company.com	1-415-555-1212

Opportunities

Opportunity Name	Stage	Amount	Close Date
Sample Text	Sample Text	\$123.45	9/25/2020

Cases

Case	Contact Name	Subject

PART 1
Configuring Tracking In Salesforce Classic
Adding Related List For Accessing Tracking Record

Go to **Properties.**

Related Lists

- FieldTracker
- Contacts
- Opportunities
- Cases

FieldTracker

Record ID	Sample Text

Contacts

Contact Name	Title	Email	Phone
Sam Sample	Sample Text	sam.sample@company.com	1-415-555-1212

Opportunities

Opportunity Name	Stage	Amount	Close Date
Sample Text	Sample Text	\$123.45	9/25/2020

Cases

Case	Contact Name	Subject

PART 1
Configuring Tracking In Salesforce Classic
Adding Related List For Accessing Tracking Record





ADDING RELATED LISTS FOR ACCESSING TRACKING RECORD

salesforce

Choose any available fields & add them to the Selected fields.

Available Fields: Created By, Created Date, JCSN, Last Activity Date, Last Modified By, Last Modified Date, Object Name

Selected Fields: Record ID, Created By

Sort By: Default

PART 1
Configuring Tracking In Salesforce Classic
Adding Related List For Accessing Tracking Record

Select Record ID given under Sort By.

Available Fields: Created By, Created Date, JCSN, Last Activity Date, Last Modified By, Last Modified Date, Object Name

Selected Fields: Record ID, Created By

Sort By: Record ID

PART 1
Configuring Tracking In Salesforce Classic
Adding Related List For Accessing Tracking Record





ADDING RELATED LISTS FOR ACCESSING TRACKING RECORD

salesforce

Click on Descending.

PART 1
Configuring Tracking In Salesforce Classic
Adding Related List For Accessing Tracking Record

Now click Ok.

PART 1
Configuring Tracking In Salesforce Classic
Adding Related List For Accessing Tracking Record



ADDING RELATED LISTS FOR ACCESSING TRACKING RECORD

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Click on "Save" after selecting "Yes"

Click **Yes** on the dialogue box asking **Overwrite Customizations.**

The screenshot shows the Salesforce Classic interface. On the left is a navigation menu with categories like 'Tools', 'Page Layouts', 'Field Sets', 'Search Layouts', 'Record Types', 'Account Teams', 'B2B Companies', 'Contacts', 'Notes', 'Opportunities', 'Quotes', 'Forecasts', 'Social Media', 'Cases', 'Entitlement Management', 'Self-Service', 'Call Center', 'Omni-Channel', and 'Chat'. The main content area displays 'Related Lists' for a 'FieldTracker' record. A dialog box titled 'Overwrite Users' Related List Customizations?' is open in the center, asking: 'You have added or moved related lists on this page layout. Do you want these changes to overwrite users' personal related list customizations?'. The dialog has 'Yes', 'No', and 'Cancel' buttons. A blue callout bubble points to the 'Yes' button. In the background, there are sections for 'Contacts' (showing 'Sarah Sample') and 'Opportunities' (showing 'Sample Text' with 'Stage: Sample Text', 'Amount: \$123.45', and 'Close Date: 9/25/2020').

PART 4

Configuring Tracking In Salesforce Classic
Adding Related List For Accessing Tracking Record





ADDING RELATED LISTS FOR ACCESSING TRACKING RECORD

salesforce

Now go to **Accounts**.

Configuring Tracking In Salesforce Classic
Adding Related List For Accessing Tracking Record

You can see that the **FieldTracker** has been added to the object.

Configuring Tracking In Salesforce Classic
Adding Related List For Accessing Tracking Record



PART – 5.2
Track The Changes



TRACK CHANGES

salesforce

Click on **Edit** given under the **Account details**.

Account Detail

Account Owner	Algorithms Admin (Chloe)	Rating	High
Account Name	Dickenson plc (Dickenson)	Phone	(785) 241-4208
Parent Account		Fax	(785) 241-4201
Account Number	000346	Website	http://dickenson-consulting.com
Account Site		Token Symbol	
Type	Customer - Direct	Ownership	Private
Industry	Consulting	Employee	120
Annual Revenue	\$5,80,00,000	SK Code	6752
Billing Address	1301 High Drive Lawrence 95045 KS USA	Shipping Address	1301 High Drive Lawrence 95045 KS USA
Customer Priority	Low	SLA	Bronze
SLA Expiration Date	27/01/2021	SLA Term Number	7425
Number of Locations	2	Opport Opportunity	No
Arch	By		
Created By	Algorithms Admin 10/07/2018 4:37 pm	Last Modified By	Algorithms Admin 25/09/2020 4:59 pm
Description			
Custom Links			

FieldTracker

PART 1

Configuring Tracking In Salesforce Classic

Track The Changes

Account Edit

Account Information

Account Owner	Algorithms Admin	Rating	High
Account Name	Dickenson plc	Phone	(785) 241-4208
Parent Account		Fax	(785) 241-4201
Account Number	000346	Website	http://dickenson-consulting.com
Account Site		Token Symbol	
Type	Customer - Direct	Ownership	Private
Industry	Consulting	Employee	120
Annual Revenue	\$5,80,00,000	SK Code	6752

Address Information

Billing Street	1301 High Drive	Shipping Street	1301 High Drive
Billing City	Lawrence	Shipping City	Lawrence
Billing Zip/Postal Code	95045		
Billing Sub/Province	US		

FieldTracker

PART 1

Configuring Tracking In Salesforce Classic

Track The Changes





TRACK THE CHANGES & MAKE NECESSARY CHANGES

salesforce

Home | Configuration Setup | Tracking Configuration | Standard Objects Summary | Custom Objects Summary | Exception +

Create New...

Account Edit
Dickenson plc

Recent Items

- Dickenson plc
- Algoworks Admin
- Account
- United Oil & Gas Corp.

Recycle Bin

Account Edit

Save Save & New Cancel

Account Information

Account Owner: Algoworks Admin

Account Name: Dickenson plc

Parent Account: [Search]

Account Number: CC9999

Account Site: [Text]

Type: Installation Partner

Industry: Consulting

Annual Revenue: 5,00,00,000

Rating: Cold

Phone: (785) 241-6200

Fax: (785) 241-6201

Website: dickenson-consulting.com

Ticker Symbol: [Text]

Ownership: Private

Employees: 120

SIC Code: 6752

Address Information

Copy Billing Address to Shipping Address

Billing Street: 1301 Hoch Drive

Billing City: Lawrence

Billing Zip/Postal Code: 66045

Billing State/Province: KS

Billing Country: USA

Shipping Street: 1301 Hoch Drive

Shipping City: Lawrence

Shipping Zip/Postal Code: 66045

Shipping State/Province: KS

Shipping Country: USA

Additional Information

Algoworks

PART 4

Configuring Tracking In Salesforce Classic

Track The Changes

Click on "Save"
after Necessary
Changes are
made





TRACK CHANGES

salesforce

Account Name: Dickinson PC [View Details] Phone: (785) 241-4200
Parent Account: [View Details] Fax: (785) 241-4201
Account Number: CC999 Website: <http://www.dickinson.com/usa>
Account Site: [View Details]
Type: Installation Partner Ownership: Private
Industry: Consulting Employees: 120
Annual Revenue: \$1,100,000 SIC Code: 6752
Billing Address: 1301 Hoch Drive Lawrence KS 66044 USA
Shipping Address: 1301 Hoch Drive Lawrence KS 66044 USA
SLA: Bronze
SLA Serial Number: T425
Spent Opportunity: No
Last Modified By: [View Details] 25/09/2020, 5:02 pm

Go to Field Tracker under Account Details.

FieldTracker New Standard Objects Summary FieldTracker Help

Action	Record ID	Created By	Action
Edit	00000000000000000000000000000000	[View Details] 25/09/2020, 5:02 pm	Changed Account Number from CC1245 to CC9999 Changed Account Rating from Hot to Cold Changed Account Type from Customer - Direct to Installation Partner Changed Active from No to Yes

Contacts New Contact Merge Contacts Contacts Help

Action	Contact Name	Title	Email
--------	--------------	-------	-------

PART 1
Configuring Tracking In Salesforce Classic
Track The Changes

Account Name: Dickinson PC [View Details] Phone: (785) 241-4200
Parent Account: [View Details] Fax: (785) 241-4201
Account Number: CC999 Website: <http://www.dickinson.com/usa>
Account Site: [View Details]
Type: Installation Partner Ownership: Private
Industry: Consulting Employees: 120
Annual Revenue: \$1,100,000 SIC Code: 6752
Billing Address: 1301 Hoch Drive Lawrence KS 66044 USA
Shipping Address: 1301 Hoch Drive Lawrence KS 66044 USA
SLA: Bronze
SLA Serial Number: T425
Spent Opportunity: No
Last Modified By: [View Details] 25/09/2020, 5:02 pm

Click on the Record ID number.

FieldTracker New Standard Objects Summary FieldTracker Help

Action	Record ID	Created By	Action
Edit	00000000000000000000000000000000	[View Details] 25/09/2020, 5:02 pm	Changed Account Number from CC1245 to CC9999 Changed Account Rating from Hot to Cold Changed Account Type from Customer - Direct to Installation Partner Changed Active from No to Yes

Contacts New Contact Merge Contacts Contacts Help

Action	Contact Name	Title	Email
--------	--------------	-------	-------

PART 1
Configuring Tracking In Salesforce Classic
Track The Changes





TRACK CHANGES

salesforce

You can now see that the action has been tracked.

The screenshot displays the Salesforce Field Tracker interface. At the top, there's a navigation bar with tabs: Home, Configuration Setup, Tracking Configuration, Standard Objects Summary (selected), and Custom Objects Summary. Below this, the 'Standard Objects Summary' section shows a record ID of 0024. The 'Standard Objects Summary Detail' section provides information about the record, including the owner 'Algoworks Admin' and the creation date '25/09/2020, 5:02 pm'. The 'Action' section lists the changes tracked: 'Changed Account Number from CC12345 to CC9999', 'Changed Account Rating from Hot to Cold', 'Changed Account Type from Customer - Direct to Installation Partner', and 'Changed Active from No to Yes'. A blue callout bubble points to the 'Action' section with the text 'You can now see that the action has been tracked.'

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PART 4
Configuring Tracking In Salesforce Classic
Track The Changes





OBJECT DELETION - FIELD TRACKING

salesforce

Home | Salesforce

0021 | Salesforce

algoworksfldtracker-dev-ed.lightning.force.com/lightning/r/FieldTracker__Standard_Summary__c/a012w000000T19aAAD/view

Search...

EPF 24.9 2533.26 KB

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports 0021 More

Standard Objects Summary
0021

New Contact Edit New Opportunity

Related Details

Record ID
0021

Object Name
Account

Owner
Algoworks Admin

Account
United Oil & Gas Corp.

Created By
Algoworks Admin, 10/09/2020, 10:30 pm

Last Modified By
Algoworks Admin, 10/09/2020, 10:30 pm

Activity

New Event New Task Log a Call Email

Create new... Add

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No next steps.
To get things moving, add a task or set up a meeting.

No past activity. Past meetings and tasks marked as done show up here.

Click on the dropdown arrow
to find options to delete the
field tracking.



PART - 6
**Configuring tracking in
Salesforce Lightning**

PART – 6.1
**Providing the Field
Accessibility**



PROVIDING THE FIELD ACCESSIBILITY



Go to *Standard Objects Summary* section.

Go to Setup and then Object Manager and Search for Standard Object Summary Section

Object Manager

LABEL	API NAME	DESCRIPTION	LAST MODIFIED	DEPLOYED	CUSTOM
Standard Objects Summary	FieldTracker__Standard_Summary__c	Custom Object Containing the old and new records of the fields enabled for history tracking on Standard Objects.	23/09/2020	✓	✓

Algoworks

PART 5
Configuring Tracking In Salesforce Lightning
Providing the Field Accessibility





sales@algorithms.com





PROVIDING THE FIELD ACCESSIBILITY

salesforce

Choose the **field accessibility level** settings for your app.

Field Accessibility

Standard Objects Summary

Back to Custom Objects: Standard Objects Summary

This page allows you to view Standard Objects Summary field accessibility for a particular field.

Field accessibility for Field: Account

Profiles	Field Access
Analytics Cloud Integration User	Visible
Analytics Cloud Security User	Visible
Contract Manager	Visible
Create Org Data Proxy User	Visible
Custom Marketing Profile	Visible
Custom Sales Profile	Visible
Custom Support Profile	Visible
Finance.com - App Subscription User	Visible
Finance.com - Free User	Visible
Gold Partner User	Visible
Identity User	Visible
Marketing User	Visible
Minimum Access - Salesforce	Visible
Partner App Subscription User	Visible

PART 3

Configuring Tracking In Salesforce Lightning
Providing the Field Accessibility

Click on a cell in the table below to change the field's accessibility.

Profiles	Field Access
Analytics Cloud Integration User	Visible
Analytics Cloud Security User	Visible
Contract Manager	Visible
Create Org Data Proxy User	Visible
Custom Marketing Profile	Visible
Custom Sales Profile	Visible
Custom Support Profile	Visible
Finance.com - App Subscription User	Visible
Finance.com - Free User	Visible
Gold Partner User	Visible
Identity User	Visible
Marketing User	Visible
Minimum Access - Salesforce	Visible
Partner App Subscription User	Visible
Partner Community Login User	Visible
Partner Community User	Visible
Read Only	Visible
Silver Partner User	Visible
Solution Manager	Visible
Standard Platform User	Visible
Standard User	Visible

Click **Hidden** given next to any of the fields.

PART 3

Configuring Tracking In Salesforce Lightning
Providing the Field Accessibility





PROVIDING THE FIELD ACCESSIBILITY

salesforce

Setup - Object Manager - Standard Objects Summary

Fields & Relationships

Analytics Cloud Integration User 11/1/2020

Analytics Cloud Security User 11/1/2020

Contract Manager 11/1/2020

Custom: Big Data Privacy User 11/1/2020

Custom: Marketing Profile 11/1/2020

Custom: Sales Profile 11/1/2020

Custom: Support Profile 11/1/2020

Force.com - App Subscription User 11/1/2020

Force.com - Free User 11/1/2020

Gold Partner User 11/1/2020

Inventory User 11/1/2020

Marketing User 11/1/2020

Minimum Access - Salesforce 11/1/2020

Partner App Subscription User 11/1/2020

Partner Community Login User 11/1/2020

Partner Community User 11/1/2020

Read Only 11/1/2020

Silver Partner User 11/1/2020

Solution Manager 11/1/2020

Standard Platform User 11/1/2020

Standard User 11/1/2020

System Administrator 11/1/2020

Multi.com Only User 11/1/2020

Workflow 11/1/2020

PART 3

Configuring Tracking In Salesforce Lightning
Providing the Field Accessibility

Setup - Object Manager - Account

Access Settings for Standard Objects Summary Field: Account

The Account field is currently Hidden for the System Administrator profile.

Field-Level Security:

Profile	Field	Visible	Read Only
System Administrator	Account	☒	☐

Page Layout:

☒ Add the Account field to the Standard Objects Summary Layout page layout.

☐ Choose a different page layout for the System Administrator profile.

Use the checkboxes below to change the page layout settings for the Account field on the Standard Objects Summary Layout page layout. The field will be added as the first field in the page layout section.

Page Layout	Section	Field	Visible	Read Only	Required
Standard Objects Summary Layout	Information	Account	☒	☐	☐

Changes to the Standard Objects Summary Layout page layout will apply to all profiles that are assigned to this page layout. The table below shows the current settings.

PART 3

Configuring Tracking In Salesforce Lightning
Providing the Field Accessibility





PROVIDING THE FIELD ACCESSIBILITY

salesforce

Click on **Save.**

Account

This Account field is currently Hidden for the System Administrator profile.

Field-Level Security:

Profile	Field	Visible	Read-Only
System Administrator	Account	☒	☐

Page Layout:

☒ Add the Account field to the Standard Objects Summary Layout page layout.
☐ Choose a different page layout for the System Administrator profile.

Use the checkboxes below to change the page layout settings for the Account field on the Standard Objects Summary Layout page layout. The field will be added as the last field in the page layout section.

Page Layout: Standard Objects Summary Layout

Section	Field	Visible	Read-Only	Required
Information	Account	☒	☐	☐

Changes to the Standard Objects Summary Layout page layout will apply to all profiles that are assigned to this page layout. The table below shows the current settings for the Standard Objects Summary Layout page layout.

PART 5
Configuring Tracking In Salesforce Lightning
Providing the Field Accessibility

Standard Objects Summary

Field & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Revised Lookup Filters

Search Layouts

Field Access

Yay! You can now see that the field access has been changed from **Hidden** to **Editable**.

PART 5
Configuring Tracking In Salesforce Lightning
Providing the Field Accessibility



PART – 6.2

**Adding Related List For
Accessing Tracking Record**



ADDING RELATED LIST FOR ACCESSING TRACKING RECORD

salesforce

Click on Page Layouts.

Setup - Object Manager - Account

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

API Name: Account

Enable Reports

Track Activities

Track Field History

Deployment Status

Help Settings

Standard Salesforce.com Help Window

PART 3

Configuring Tracking In Salesforce Lightning

Adding Related List For Accessing Tracking Record

Algoworks

Go to Account Layout.

Setup - Object Manager - Account

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Page Layouts

4 items, sorted by Page Layout Name

PAGE LAYOUT NAME	MODIFIED BY
Account (Marketing) Layout	Algoworks Admin, 02/07/2020, 4:37 PM
Account (Sales) Layout	Algoworks Admin, 02/07/2020, 4:37 PM
Account (Support) Layout	Algoworks Admin, 02/07/2020, 4:37 PM
Account Layout	Algoworks Admin, 25/08/2020, 5:30 PM

PART 3

Configuring Tracking In Salesforce Lightning

Adding Related List For Accessing Tracking Record

Algoworks





ADDING RELATED LIST FOR ACCESSING TRACKING RECORD

salesforce

Click on *Related Lists*.

Setup - Object Manager - Account

Details

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Account Sample

Highlights Panel

Quick Actions in the Salesforce Classic

Publisher

Post File New Task New Contact New Case

PART 5

Configuring Tracking In Salesforce Lightning
Adding Related List For Accessing Tracking Record

Drag & Drop *Field Tracker* onto the *Related Lists* section.

Setup - Object Manager - Account

Details

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Related Lists

Contacts

Opportunities

Account Sample

Sample Text

Sample Text

PART 5

Configuring Tracking In Salesforce Lightning
Adding Related List For Accessing Tracking Record





ADDING RELATED LIST FOR ACCESSING TRACKING RECORD

salesforce

Go to Properties.

Related Lists

FieldTracker

Account ID

Sample Text

CONTACTS

Contact Name Title Email Phone

Sample Sample Sample Sample

PART 1

Configuring Tracking In Salesforce Lightning
Adding Related List For Accessing Tracking Record

Algoworks

Choose any available fields & add them to the Selected fields.

Related Lists

FieldTracker

Account ID

Sample Text

CONTACTS

Contact Name Title Email Phone

Sample Sample Sample Sample

PART 1

Configuring Tracking In Salesforce Lightning
Adding Related List For Accessing Tracking Record

Algoworks





ADDING RELATED LIST FOR ACCESSING TRACKING RECORD

salesforce

Click on Descending.

PART 1

Configuring Tracking In Salesforce Lightning
Adding Related List For Accessing Tracking Record

Click Ok.

PART 2

Configuring Tracking In Salesforce Lightning
Adding Related List For Accessing Tracking Record





ADDING RELATED LIST FOR ACCESSING TRACKING RECORD



Click on **Save.**

Related Lists

Field Tracker	Created By	Action
Sample Text	Sample Text	Sample Text

PART 2
Configuring Tracking In Salesforce Lightning
Adding Related List For Accessing Tracking Record

You can now see that **Field Tracker** has been added to the section.

Related

- FieldTracker (2)
- Contacts (4)

PART 3
Configuring Tracking In Salesforce Lightning
Adding Related List For Accessing Tracking Record



PART – 6.3
Track The Changes



TRACK THE CHANGES

salesforce

Account: **United Oil & Gas Corp.**

Type: Installation Partner | Phone: (212) 842-5500 | Website: http://www.uos.com | Account Owner: Algoworks Admin | Account Site: | Industry: Energy

Related | **Details** | News

Account Owner: Algoworks Admin | Rating: Hot

* Account Name: United Oil & Gas Corp. | Phone: (212) 842-5500

Parent Account: Search Accounts... | Fax: (212) 842-5501

Account Number: CD12345 | Website: http://www.uos.com

Activity | Chatter

New Task | Log a Call | New Event | Email

Create new... Add

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No next steps

PART 5
Configuring Tracking In Salesforce Lightning
Track The Changes





TRACK THE CHANGES



The screenshot shows the Salesforce Lightning interface for an Account record. The account name is 'United Oil & Gas Corp.'. The left sidebar contains a navigation menu with options like Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, and More. The main content area displays the account details, including fields for Billing Country, Shipping Country, Customer Priority (set to High), SLA (set to Platinum), SLA Expiration Date (27/01/2021), SLA Serial Number (6654), Number of Locations (955), and Upsell Opportunity. A blue callout bubble with the text 'Now click on Save.' points to the 'Save' button at the bottom of the form. A black arrow points to the right side of the account details section. At the bottom of the screenshot, there is a dark blue banner with the text 'PART 5 Configuring Tracking In Salesforce Lightning Track The Changes'.





TRACK THE CHANGES

salesforce

Hurray! You can now see that the Action taken has been recorded.

Standard Objects Summary
0025

Related Details

Record ID
0025

Owner
Algoworks Admin

Account
United Oil & Gas Corp.

Created By
Algoworks Admin, 25/09/2020, 5:53 pm

Object Name
Account

Action
Changed Account Number from CD12345 to CD9999
Changed Account Rating from Hot to Cold
Changed Account Type from Installation Partner to Customer - Direct
Changed Active from Yes to No

Last Modified By
Algoworks Admin, 25/09/2020, 5:53 pm

Activity

New Event New Task Log a Call Email

Create new... Add

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

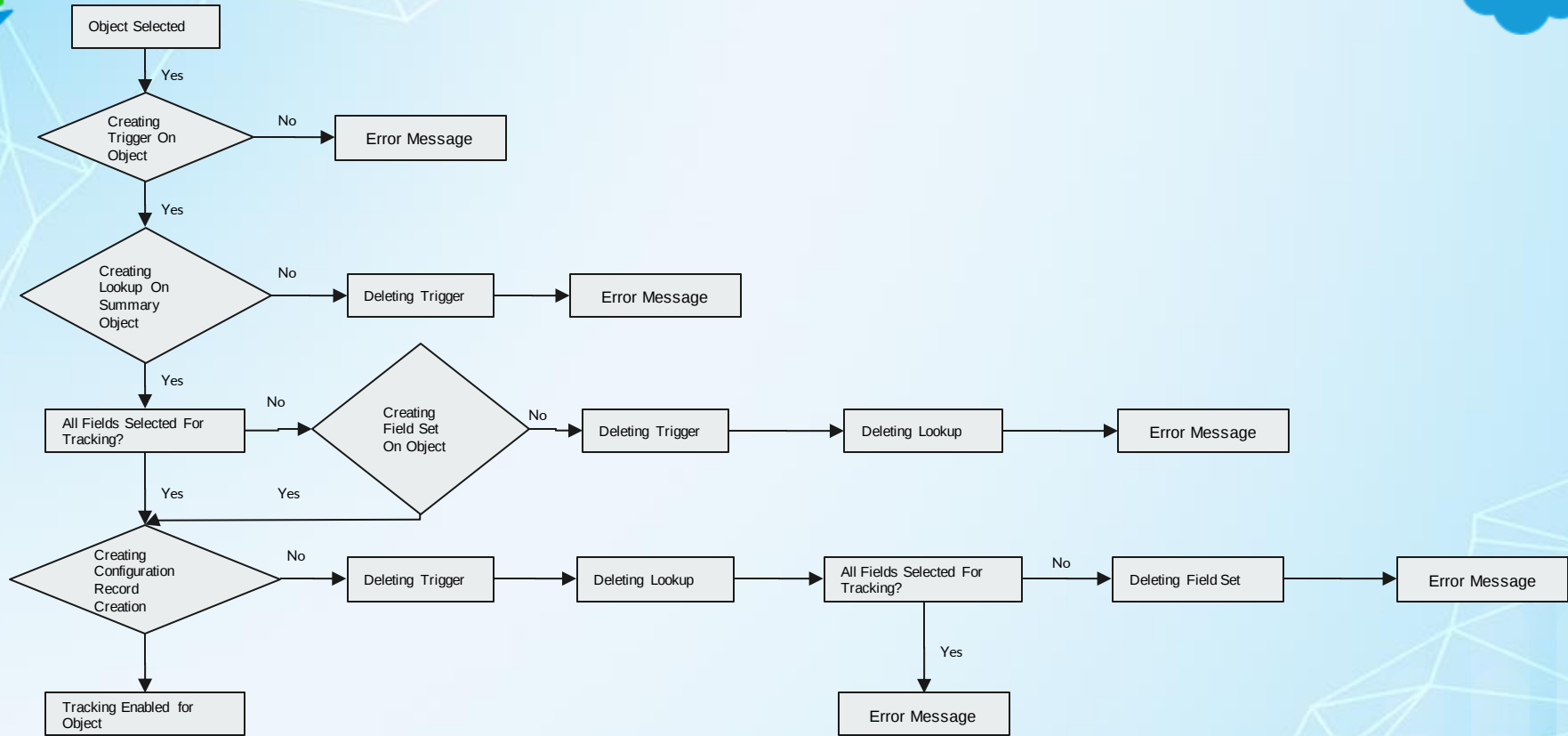
No next steps.
To get things moving, add a task or set up a meeting.

No past activity. Past meetings and tasks marked as done show.

PART 5
Configuring Tracking In Salesforce Lightning
Track The Changes



CONFIGURATION CREATION - PROCESS FLOW



 This process flow describes the end to end configuration creation.





POST - INSTALLATION STEPS



Customize Configuration For Selected Objects

1. Go to the Field **Field Tracker** App.
2. Click on **Configuration Setup** Tab.
3. Already Configured Objects and their Fields will populate in the data table.
4. Click on **Edit Record** Button for the Object needs to customize.
5. After clicking on edit Object its configuration record will populate in the Multi Select Pick list.
6. Select/De Select the Fields on the multi-select pick list to enable/disable Field Field Tracker on the Fields.
7. Select **All Field** check box if you want to enable all fields of the object for tracking.
8. Deselect **All Field** check box if you want to disable all fields from tracking and want to select custom fields for tracking.
9. Click on **Save** Button to update the object configuration.



The background image shows a person's hands typing on a silver laptop. A large, semi-transparent blue circle is centered over the laptop. Several small blue dots are scattered around the circle, and thin white lines connect some of them, creating a network-like pattern. The overall aesthetic is clean and modern.

PART - 7

Remove Tracking

The background image shows a person's hands typing on a silver laptop. A large, semi-transparent blue circle is centered over the laptop. Several small blue dots are scattered around the circle, and thin white lines connect some of them, creating a network-like pattern. The overall aesthetic is clean and modern.

PART - 7.1

Remove Tracking on Temporary Basis



OBJECT DELETION - FIELD TRACKING



CONFIGURATION PAGE | Salesforce | algoworksfiedtracker-dev-ed.lightning.force.com/lightning/n/FieldTracker__Configuration_Setup

Field Tracker | Home | Configuration Setup | Tracking Configuration | Standard Objects Summary | Custom Objects Summary | Exception

Field Tracking Configuration Page

Algoworks

Standard Object Relationship: 1/40

Custom Object Relationship: 0/40

Add New Object + All S C

☐	S.NO	OBJECT NAME	STATUS	SELECTED FIELDS	ACTION
☐	1	Account	☒ Active	Account Name,Account Number,Account Type,Active,Annual Revenue,Owner ID	

javascript:void(0);





OBJECT DELETION - FIELD TRACKING

salesforce

Field Tracker Home Configuration Setup Tracking Configuration Standard Objects Summary Custom Objects Summary Exception

Algoworks

Check the *objects* from the list.

Custom Object Relationship 1/40

Add New Object All S C

S.NO	OBJECT NAME	STATUS	SELECTED FIELDS	ACTION
1	Account	Active	Account Description,Account Name,Account Number,Account Rating,Account Site,Account Type,Active	 
2	Custom Object	Active	all Fields	 

Deactivate Activate

PART 5
Remove Tracking
Remove Tracking On Temporary Basis

Select the Fields that needs to be removed and Click on "Deactivate"





OBJECT DELETION - FIELD TRACKING



Field Tracking Configuration Page

Standard Object Relationship

1/40

Add New Object +

All S C

S.NO	OBJECT NAME	STATUS	SELECTED FIELDS	ACTION
1	Account	Active	Account Description,Account Name,Account Number,Account Rating,Account Site,Account Type,Active	 
2	Custom Object	Active	☒ all Fields	 

Algoworks

PART 5

Remove Tracking

Remove Tracking On Temporary Basis

The tracking for the chosen objects will be temporarily removed.





POST - INSTALLATION STEPS



Removing Tracking For Selected Objects

Removing Tracking on Temporary Basis

1. Go to the **Field Tracker** App.
2. Click on **Configuration Setup** Tab.
3. Already Configured Objects and their Fields will populate in the data table.
4. Select the Objects from the data table you want to remove tracking for temporary basis.
5. On Selecting Object Activate/Deactivate Buttons will populate.
6. Click on Activate/Deactivate Button to Enable/Disable the Tracking on Objects.



The background image shows a person's hands typing on a silver laptop. A large, semi-transparent blue circle is centered over the laptop. Several small blue dots are scattered around the circle, and thin white lines connect some of them, creating a network-like pattern. The overall aesthetic is clean and modern.

PART - 7.2

Remove Tracking on Permanent Basis



OBJECT DELETION - FIELD TRACKING



CONFIGURATION PAGE | Salesforce

algoworksfldtracker-dev-ed.lightning.force.com/lightning/n/FieldTracker__Configuration_Setup

Field Tracker Home Configuration Setup Tracking Configuration Standard Objects Summary Custom Objects Summary Exception

Field Tracking Configuration Page

Standard Object Relationship: 1/40 Custom Object Relationship: 0/40

Add New Object + All S C

S.NO	OBJECT NAME	STATUS	SELECTED FIELDS	ACTION
1	Account	Active	Account Name,Account Number,Account Type,Active,Annual Revenue,Owner ID	 

Click on the  icon to delete the field tracking for the object.





OBJECT DELETION - FIELD TRACKING

salesforce

The screenshot shows the Salesforce Field Tracker Configuration Setup page. A confirmation dialog box is displayed in the center, asking "Are you sure you want to delete this tracking?". The dialog has a red header with the word "Confirmation" and two buttons at the bottom: "Cancel" (red) and "OK" (blue). The "OK" button is circled in blue. In the background, the configuration page is visible, showing progress bars for "Standard Object Realtime" (1/40) and "Custom Object Realtime" (0/60). The page title is "Field Tracking Configuration Page" and the Algoworks logo is in the top right corner. The browser address bar shows the URL "algoworksfldtracker-dev-ed.lightning.force.com/lightning/n/FieldTracker_Configuration_Setup".

When a pop-up appears, Click on yes to delete the Record or Click on no to cancel deletion.





POST - INSTALLATION STEPS



Removing Tracking For Selected Objects

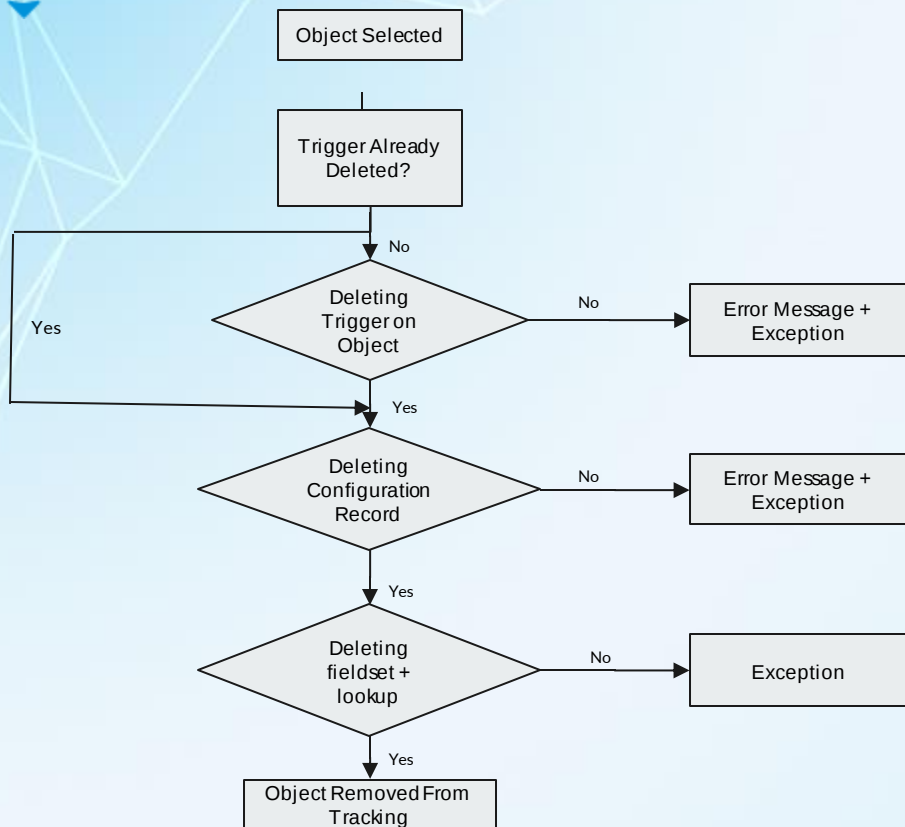
- **Removing Tracking on Permanent Basis**

1. Go to the **Field Tracker** App.
2. Click on **Configuration Setup** Tab.
3. Already Configured Objects and their Fields will populate in the data table.
4. Click on the **Delete icon** from the Object Record you want to remove tracking permanently.
5. On the Clicking **Delete icon** a popup will appear, confirm the popup and Object Configuration will be permanently deleted.





OBJECT DELETION - PROCESS FLOW



This is the process flow for the Configuration deletion. Here the user would be able to disable the Field tracker and delete the Configuration settings that have been applied for the objects and fields.

 This process flow describes the end to end configuration creation.





TECHNICAL CHALLENGES & SOLUTIONS



How to create triggers on selected objects?

Using MetaData API.

Where to store all the old and new data?

History Tracking Custom Summary Object.

Where to show the tracked records?

New Related List under Selected Objects

How to invoke Apex Classes after changing any field data on selected objects?

After installation, post-update triggers will be created on the selected objects calling the apex class on changing the records of selected fields.

How to remove an existing selected object or fields from tracking?

Tracked by Configuration Record of Configuration Object.





TECHNICAL CHALLENGES & SOLUTIONS



How to add fields of an Object for tracking?

Using Field Set Creation on the Selected

How to create a fieldset on the selected Object for tracking?

Using MetaData API

How to set edit permission for the History Tracking Object?

Using Permission Set (Admin Purpose)

What if Object name Changes?

Object Uniqueness is maintained by Object Prefix.





**DELIVERING
SOLUTIONS
WORLDWIDE**

