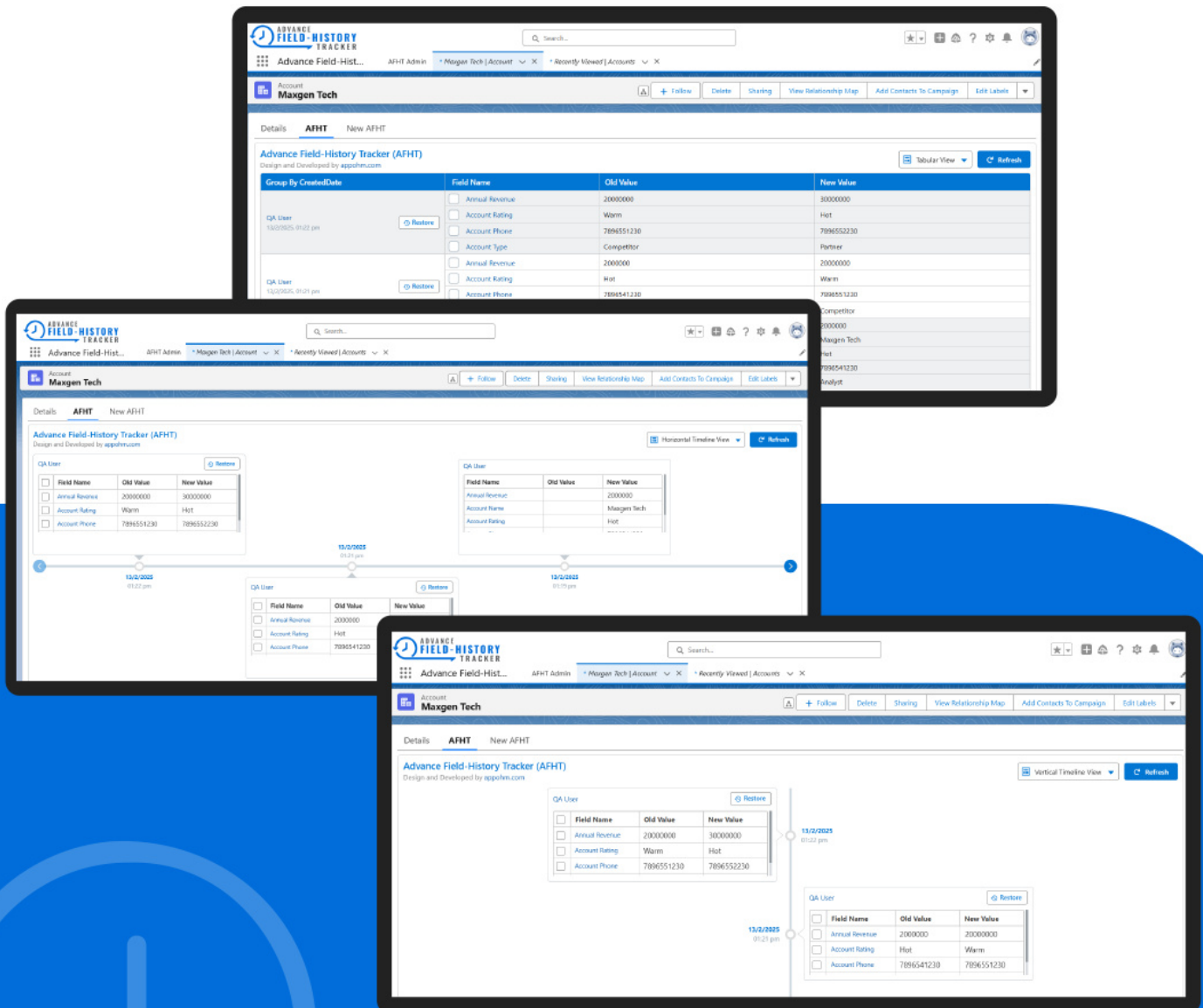




END USER GUIDE

ADVANCE FIELD-HISTORY TRACKER

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1. Introduction

Advance Field-History Tracking (AFHT) is an app built on Salesforce that is native to the platform and extends the capabilities of Salesforce native field history. The admin can configure the app for **multiple subjects** using a dedicated admin panel and visualize the historical data in multiple views for a record. The comparison is shown below -

Salesforce Native Field History Tracking	Appohm Advance Field-History Tracker (AFHT)
Can only track up to 20 fields per object.	Allows to track unlimited fields per object
Picklist, Multipicklist, Text area (long), and Text area (Rich) are not supported.	All types of data fields are supported, except for Encrypted and Compound fields.
The field cannot be restored to its old value	Allows to restore one or multiple fields per user choice.
Support only one basic (tabular) view	Better visual experience with out-of-box views - Tabular, Vertical, and Horizontal
Field types like URL and reference are not clickable	Field types like URL and reference are clickable and redirect to the respective page

2. Versions

The app is available in two versions: **LIMITED** and **PRO**.

1. Administrators can use the **LIMITED** version for free after installing it from the AppExchange.
2. To enable the **PRO** version, administrators should contact *Appohm Technologies* at support@appohm.com.

Sr. No.	FEATURES	LIMITED VERSION	PRO VERSION
1	Configuration limit	5	Unlimited
2	Record History Limit	5000	Unlimited

- Error message when configuration Limit exceeds in a limited version.

Add Field Tracking Configuration

Select Object Name

Q Asset

Search Field

Select Default Timeline View

Q Search Fields

Tabular View

☐ Account ID

☒ City

☐ Description

☐ Latitude

☐ Postal Code

☐ Quantity

☐ Street

☐ Geocode Accuracy

☐ Longitude

☐ Price

☐ Serial Number

☐ Usage End Date

☐ Install Date

☐ Owner ID

☐ Product ID

☐ State

☐ Asset Serviced By ID

☐ Country

☐ Internal Asset

☐ Parent Asset ID

☐ Purchase Date

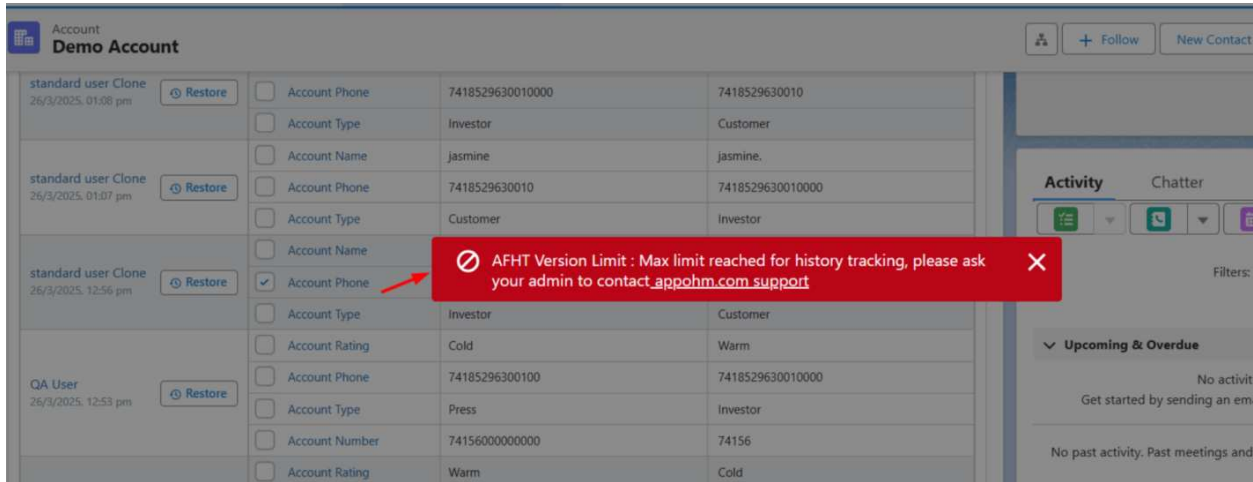
☐ Status

AFHT Version Limit : Configuration limit exceeded for Free version. Please contact support@appohm.com to upgrade to Pro version.

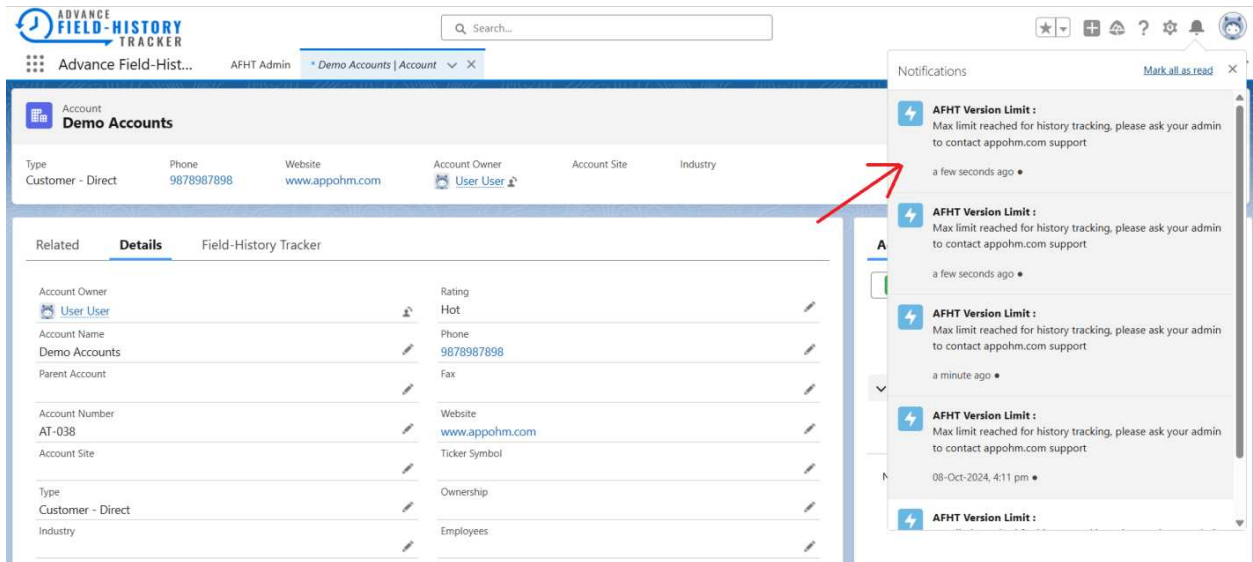
Cancel

Save

- Error message when Field History Tracking Limit exceeds in a limited version.



- Notification is sent to the System Admin and Users with the AFHT Admin permission set when the record limit is exceeded in the limited version.



- Record History Limit consumption email notification is sent to System Admin user with AFHT Admin permissionSet when record limit reaches to 4000 and 4500.

Email notification on 4000:

Notification: AFHT App Limit Consumption Update

Spam x

QA User

via 8eb59pnklhcx5j5h.cpiadb.dn-n6koruav.ind138.bnc.salesforce.com

to me

Mon, Feb 17, 5:55 PM (3 days ago)

☆

😊

↩

⋮

Why is this message in spam? It is similar to messages that were identified as spam in the past.

Report not spam

i

Dear QA User

I hope this message finds you well. As part of our regular updates, we wanted to inform you about the current consumption against the app's configured limits. Here are the details:
Current Usage: 4001
Maximum Limit: 5000
Remaining Capacity: 999
Please note that the app is nearing its configured limit. To ensure uninterrupted functionality, you may want to consider reviewing the usage or upgrading to PRO version. If you have any questions or would like assistance with upgrading, please feel free to reach out to support@appohm.com.
Thank you for your attention to this matter.
Best Regards,
AFHT Product Team

Email notification on 4500:

Notification: AFHT App Limit Consumption Update

Spam x

QA User

via k2goboqgn2wwgfg.fdi2n.dn-n6koruav.ind138.bnc.salesforce.com

to me

Mon, Feb 17, 6:10 PM (3 days ago)

☆

😊

↩

⋮

Why is this message in spam? It is similar to messages that were identified as spam in the past.

Report not spam

i

Dear QA User

I hope this message finds you well. As part of our regular updates, we wanted to inform you about the current consumption against the app's configured limits. Here are the details:
Current Usage: 4500
Maximum Limit: 5000
Remaining Capacity: 500
Please note that the app is nearing its configured limit. To ensure uninterrupted functionality, you may want to consider reviewing the usage or upgrading to PRO version. If you have any questions or would like assistance with upgrading, please feel free to reach out to support@appohm.com.
Thank you for your attention to this matter.
Best Regards,
AFHT Product Team

Advance Field-History Tracker | End User Guide

- Email Notification is sent to the System Admin and Users with the AFHT Admin permission set when the record limit is exceeded in the limited version.

0BZo000000KyjG Sandbox: Action Required: AFHT app Failure Due to Version Limit Inbox x



User User [via 8bz18vejmalisc.us6n.f3-iyatmag.cs290.bnc.sandbox.salesforce.com](#)
to jkaur036@gmail.com

Thu, Mar 20, 12:16 PM (7 days ago) ☆ ☹ ↶ ⋮

Dear User User

I hope this message finds you well. You are receiving this email as one of the administrators of the Advance Field History Tracking (AFHT) app for Salesforce. It is to inform you that AFHT application has encountered a failure due to - **AFHT Version Limit : Max limit reached for history tracking.**

It means app functionality to track fields is paused. To resolve it, an upgrade to the paid PRO version is required. If you're interested in addressing this error, please create a support ticket [here](#)

NOTE: The next notification email will be received in 3 days. To stop receiving the "Limit Exceeded" notifications emails, please visit the AFHT Admin Page and disable the "Limit Reached Email Notification" option.

Thank you for your attention to this matter.

Best Regards,
AFHT Product Team



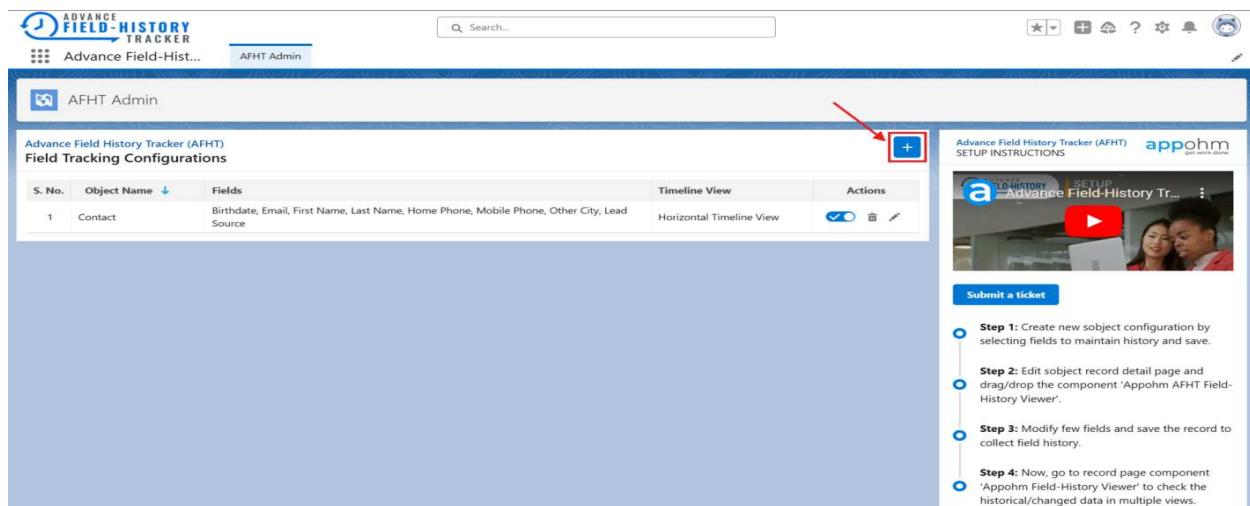
3. Managing Field Tracking Configurations: Creation, Editing, and Deletion

NOTE: To use and configure the Advance Field-History Tracker Application, the “**AFHT Admin**” Permission Set must be assigned to User with the System Administrator Profile. Additionally, if any AFHT configuration is active, at least one System Administrator user must have the “**AFHT Admin**” Permission Set assigned. Please note that AFHT-related emails will be sent to the users who have the “**AFHT Admin**” Permission Set assigned.

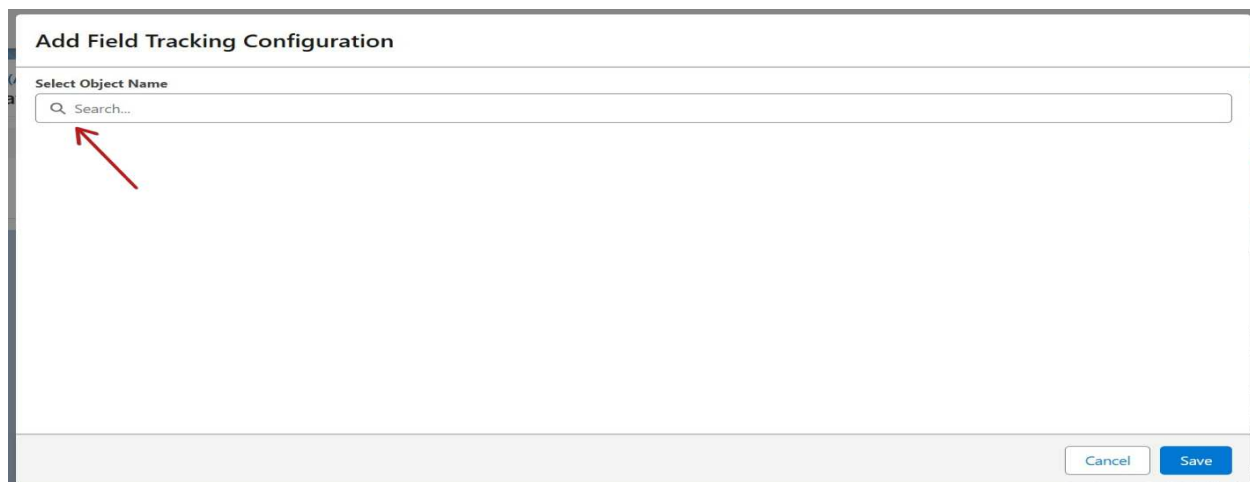
Users can create, edit, and delete Field Tracking Configurations on the AFHT Admin tab.

To create a new Field Tracking Configuration

- Click on the “+” icon on the AFHT Admin tab.



- Search/Select the Object of your choice (for ex. **Account**).



- **Select the Fields** you want to track **Select the Default Timeline View** of your choice and then click on the “**Save**” button. (Configuration will be created successfully)

Add Field Tracking Configuration

Select Object Name

Search Field ⓘ

Select Default Timeline View

Vertical Timeline View

☐ Account Description
☐ Account Phone
☒ Account Type
☐ Billing Geocode Accuracy
☐ Billing Street
☐ D-U-N-S Number
☐ Industry

☐ Account Fax
☒ Account Rating
☐ Annual Revenue
☐ Billing Latitude
☐ Billing Zip/Postal Code
☐ Data.com Key
☐ NAICS Code

☒ Account Name
☐ Account Site
☐ Billing City
☐ Billing Longitude
☐ Clean Status
☐ Email
☐ NAICS Description

☐ Account Number
☒ Account Source
☐ Billing Country
☐ Billing State/Province
☐ D&B Company ID
☐ Employees
☐ Operating Hour ID

Advance Field-Hist...

AFHT Admin

AFHT Admin

Advance Field History Tracker (AFHT)

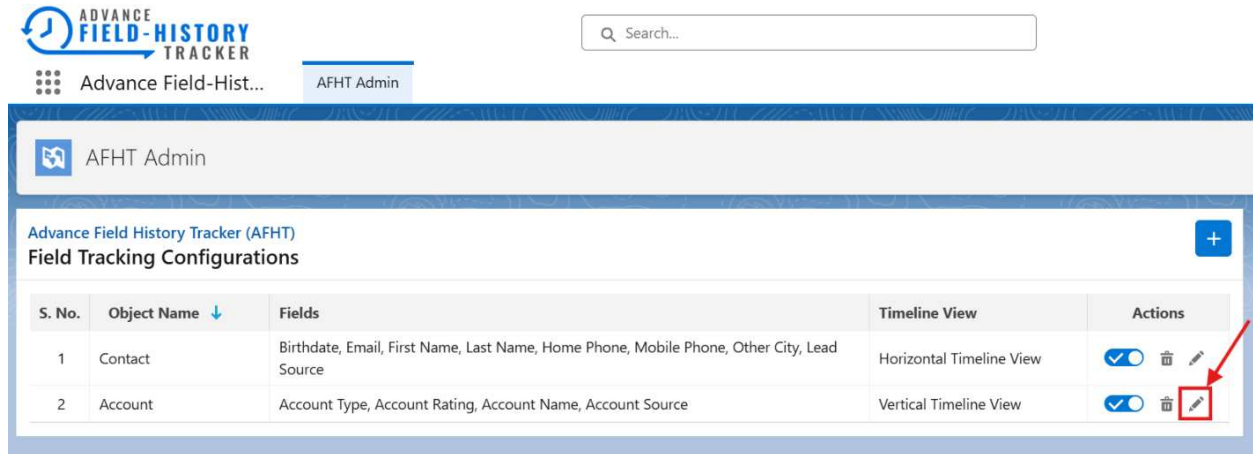
Field Tracking Configurations

+

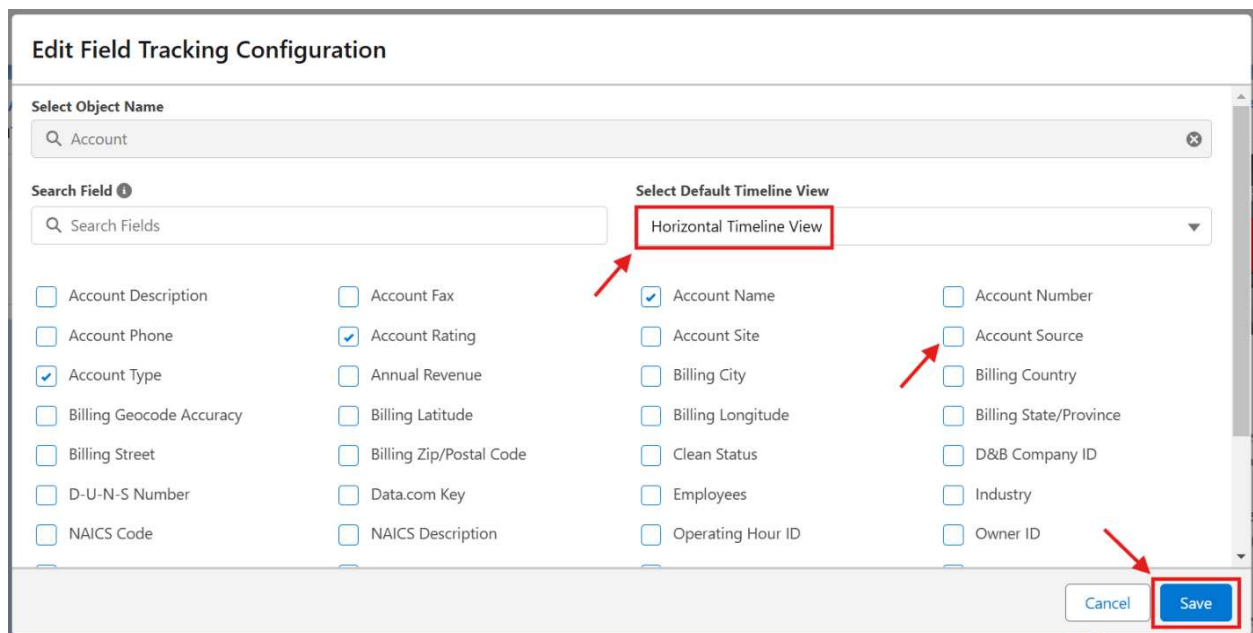
S. No.	Object Name ↓	Fields	Timeline View	Actions
1	Contact	Birthdate, Email, First Name, Last Name, Home Phone, Mobile Phone, Other City, Lead Source	Horizontal Timeline View	☒ ☐ ☐
2	Account	Account Type, Account Rating, Account Name, Account Source	Vertical Timeline View	☒ ☐ ☐

To edit an existing Field Tracking Configuration

- Click on any configuration's **'Edit'** icon (under the **Action** column).



- The "Edit Field Tracking Configuration" pop-up will appear. Make the necessary changes by selecting or deselecting fields for tracking, then click the 'Save' button to update the configuration successfully.



Advance Field-Hist...

AFHT Admin

AFHT Admin

Success

Account Configuration was updated.

Advance Field History Tracker (AFHT)

Field Tracking Configurations

S. No.	Object Name ↓	Fields	Timeline View	Actions
1	Contact	Birthdate, Email, First Name, Last Name, Home Phone, Mobile Phone, Other City, Lead Source	Horizontal Timeline View	☒
2	Account	Account Type, Account Rating, Account Name	Horizontal Timeline View	☒

To delete an existing Field Tracking Configuration

- Click on any configuration's **'Delete'** icon (under the **Action** column).

Advance Field-Hist...

AFHT Admin

AFHT Admin

Advance Field History Tracker (AFHT)

Field Tracking Configurations

S. No.	Object Name ↓	Fields	Timeline View	Actions
1	Contact	Birthdate, Email, First Name, Last Name, Home Phone, Mobile Phone, Other City, Lead Source	Horizontal Timeline View	☒
2	Account	Account Type, Account Rating, Account Name	Horizontal Timeline View	☒

- A **confirmation pop-up** will appear, Click on the **"Ok"** button. (Configuration will be successfully deleted)

Please Confirm

Warning : This action will permanently delete the selected configuration and users will not be able to track the field history for the selected configuration.

Are you sure you want to proceed?

Cancel

OK

ADVANCE

FIELD-HISTORY

TRACKER

AFHT Admin

Search...

AFHT Admin

Success
Configuration was Deleted.

Advance Field History Tracker (AFHT)

Field Tracking Configurations

S. No.	Object Name	Fields	Timeline View	Actions
1	Contact	Birthdate, Email, First Name, Last Name, Home Phone, Mobile Phone, Other City, Lead Source	Horizontal Timeline View	

4. Activating and Deactivating Field Tracking Configurations

Users can activate or deactivate a Field Tracking Configuration within the AFHT Admin tab.

To activate a Field Tracking Configuration

- Enable the “toggle” icon for the sObject on the AFHT Admin tab.

The screenshot displays the AFHT Admin interface. At the top, there is a search bar and a navigation bar with tabs for 'Advance Field-Hist...' and 'AFHT Admin'. A green success message banner at the top right states 'Success Account Configuration was Activated.' Below this, the 'AFHT Admin' section is titled 'Advance Field History Tracker (AFHT) Field Tracking Configurations'. It contains a table with two rows: 'Contact' and 'Account'. The 'Account' row is highlighted, and its 'Actions' column shows a toggle switch that is currently turned on (blue). A red arrow points to this toggle switch. Another red arrow points to the success message banner.

S. No.	Object Name ↓	Fields	Timeline View	Actions
1	Contact	Birthdate, Email, First Name, Last Name, Home Phone, Mobile Phone, Other City, Lead Source	Horizontal Timeline View	  
2	Account	Account Type, Account Rating, Account Name	Horizontal Timeline View	  

Note: Once the configuration is activated, the User will be able to check/track the configured fields.

Advance Field-History Tracker (AFHT)
Design and Developed by appohm.com

Horizontal Timeline View Refresh

User User Restore

☐	Field Name	Old Value	New Value
☐	Account Name	John Smith	John Smiths
☐	Account Rating	Hot	Warm
☐	Account Type	Prospect	Other

13/2/2025 11:40 am

To deactivate a Field Tracking Configuration

- Disable the “toggle” icon on the AFHT Admin tab.

Success
Account Configuration was Deactivated.

Advance Field History Tracker (AFHT)
Field Tracking Configurations

S. No.	Object Name	Fields	Timeline View	Actions
1	Contact	Birthdate, Email, First Name, Last Name, Home Phone, Mobile Phone, Other City, Lead Source	Horizontal Timeline View	☒
2	Account	Account Type, Account Rating, Account Name	Horizontal Timeline View	☐

Note: If a Field Tracking Configuration is deactivated, users will not be able to track the configured fields.



Account

John Smiths

Type
Other

Phone

Website

Account Owner

Account Site

Industry

User User

Related

Details

Advance Field History Trac...



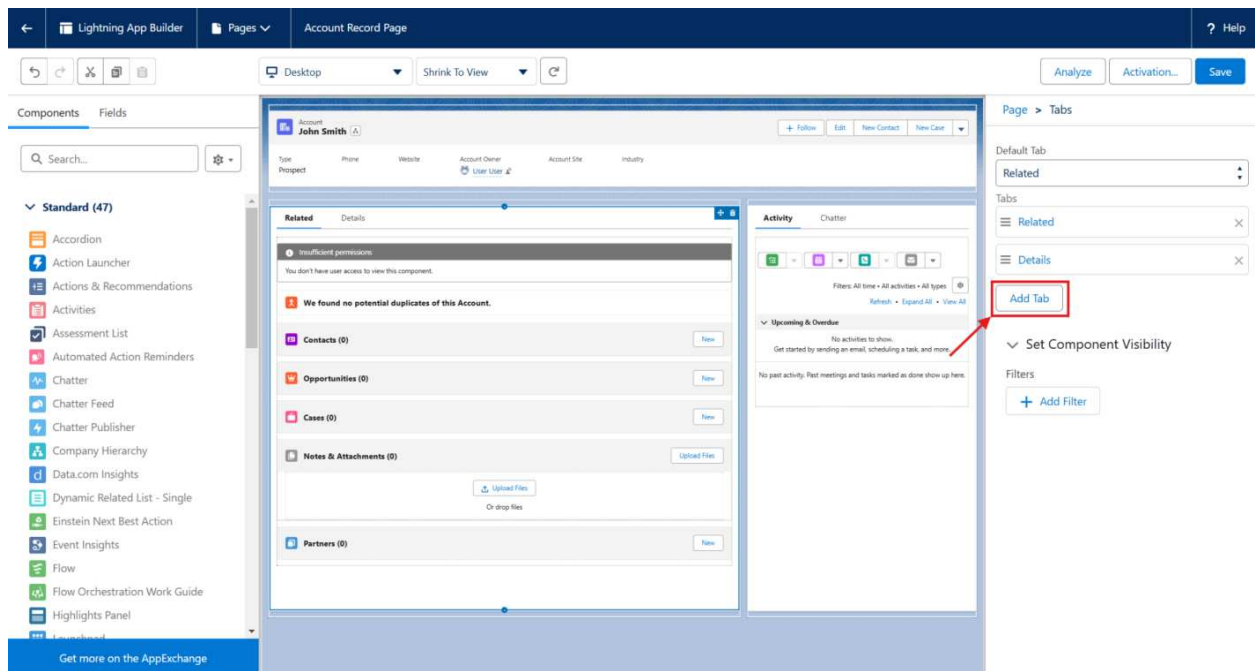
Inactive/Deleted Configuration : There is no active configuration found for the sobject, please check with System Administrator to setup Advance Field-History Tracking (AFHT) Configuration for this sobject.



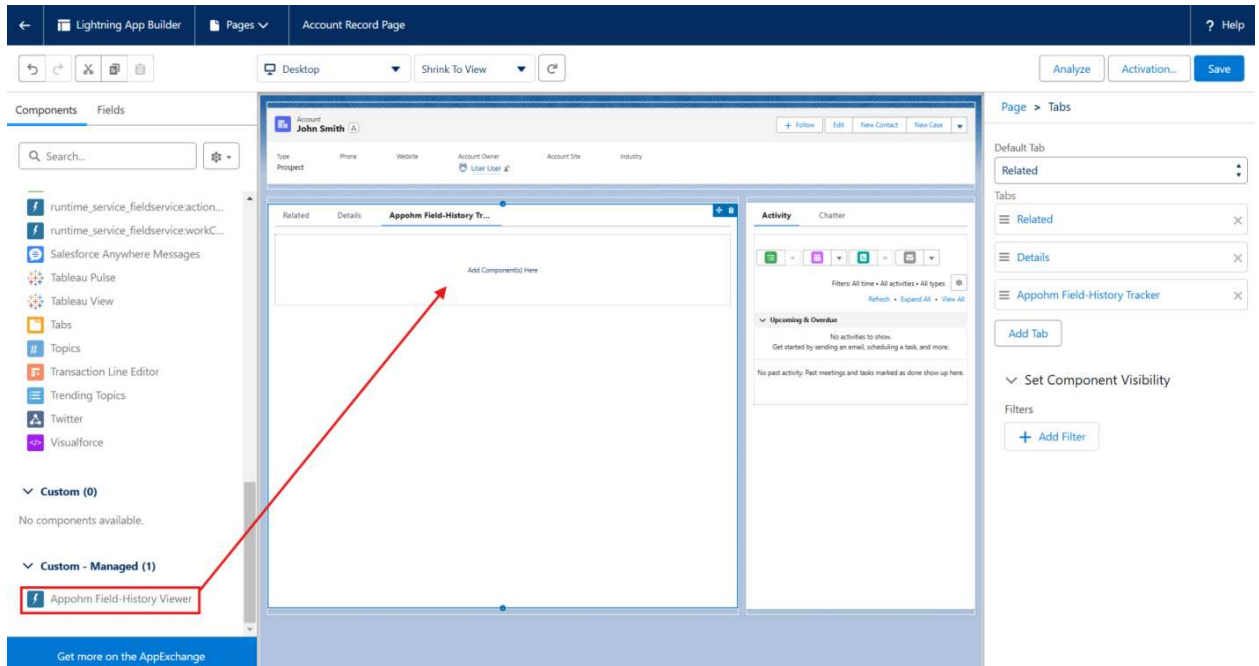
5. Tracking Configured Fields with the Appohm Field-History Tracker (Tabular / Horizontal / Vertical) Component

To track the configured fields in the selected timeline views, users must navigate to the AFHT Admin tab, create a configuration for the relevant object (e.g., Account), and then follow the steps below.

- Navigate to any Account record page.
- Click the "Gear" icon, then select the "Edit Page" link.
- In the Component/Tabs section, click the "Add Tab" button on the right side. For clarity, label the new tab as “Appohm Field-History Tracker.”



- Click on the tab name in the section/layout. Then, drag the custom component "Appohm Field-History Viewer" and drop it onto the newly created tab.



- Save and activate the page.
- Return to the Account record page and edit the fields selected for tracking.
- Click on the "Appohm Field History Tracker" tab, then select any list or timeline view to track or view the history of the configured fields.



Account

John Smiths

Type
Other

Phone

Website

Account Owner

User User

Account Site

Industry

Related

Details

Appohm Field-History Tra...

Advance Field-History Tracker (AFHT)

Design and Developed by appohm.com

Horizontal Timeline View

Refresh

User User

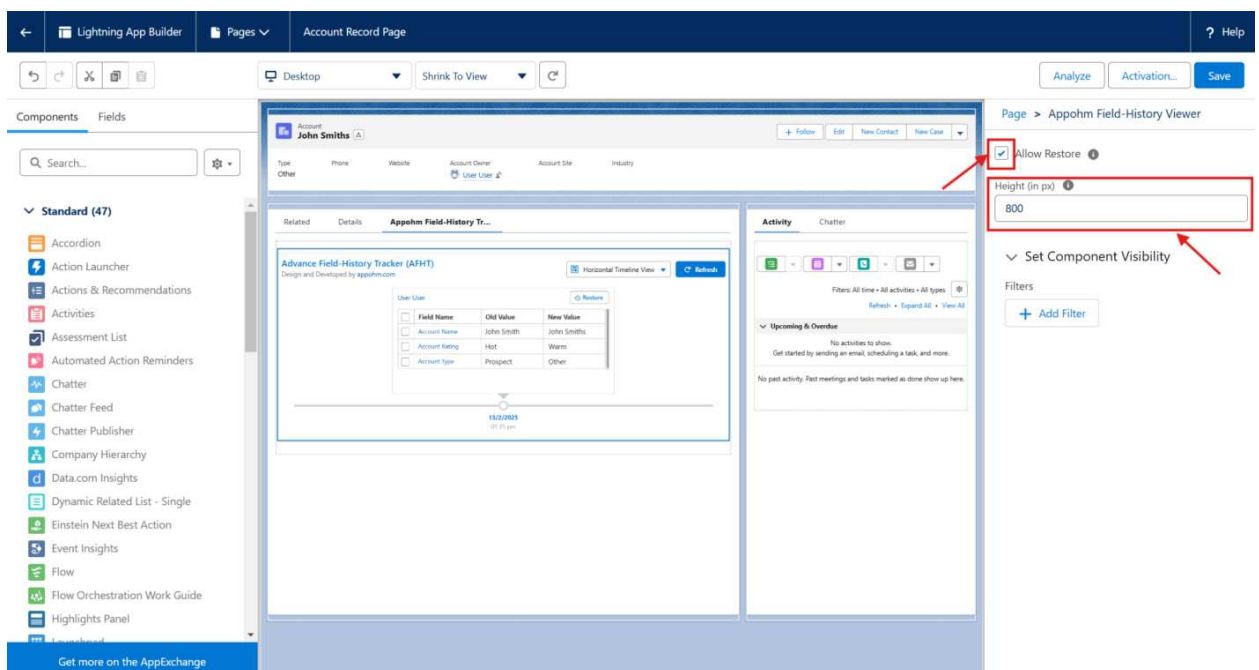
Field Name	Old Value	New Value
Account Name	John Smith	John Smiths
Account Rating	Hot	Warm
Account Type	Prospect	Other

13/2/2025
01:35 pm

6. Restoring Record History of Configured Fields with the Appohm Field-History Views (Tabular / Horizontal / Vertical) Component

To restore the configured fields on the selected list/timeline views, Users have to go to the AFHT Admin tab create a configuration with the respective object (for ex. **Account**), and then follow the steps mentioned in the [previous section](#) to add a component on the layout and then proceed with the steps below to restore the fields.

- Navigate to the "Tab" select the component and check the **Allow Restore** checkbox
- Set Height textbox =800



- Save and Activate the page
- Now go back to the Account record page and edit the fields selected for tracking
- Click on the **Appohm Field-History Tracker** tab and Select/Click on any list/timeline view to track/view the history of the configured fields.
- Select the checkbox of any fields.

For Ex-

1. Account Name
2. Account Rating
3. Account Type

- Click on the **Restore** button.

The screenshot displays the AFHT interface. At the top, there's a search bar and a user menu for 'John Smiths'. Below this, the account details for 'John Smiths' are shown, including fields for Type, Phone, Website, Account Owner (User User), Account Site, and Industry. The main section is titled 'Appohm Field-History Tra...' and contains a table of account history. A red box highlights the 'Field Name' column in the table, and a red arrow points to the 'Restore' button next to the table. The table has columns for 'Field Name', 'Old Value', and 'New Value'. The data rows are:

Field Name	Old Value	New Value
Account Name	John Smith	John Smiths
Account Rating	Hot	Warm
Account Type	Prospect	Other

Below the table, a timeline shows the date and time of the change: 13/2/2025 01:35 pm.

- Go to the **Appohm Field-History Tracker** tab and choose any timeline view, User will be able to view/track the restored fields.

The screenshot displays the Appohm Field-History Tracker (AFHT) interface. At the top, there is a navigation bar with the logo, a search bar, and user information for John Smiths. The main content area shows a timeline view for the user. A table lists the fields being tracked: Account Name, Account Rating, and Account Type, along with their old and new values. A timeline axis shows two points: 13/2/2025 01:40 pm (highlighted with a red arrow) and 13/2/2025 01:35 pm. Each point has a corresponding table showing the state of the fields at that time.

Advance Field-History Tracker (AFHT)
Design and Developed by appohm.com

Horizontal Timeline View Refresh

User User Restore

☐	Field Name	Old Value	New Value
☐	Account Name	John Smiths	John Smith
☐	Account Rating	Warm	Hot
☐	Account Type	Other	Prospect

13/2/2025 01:40 pm

13/2/2025 01:35 pm

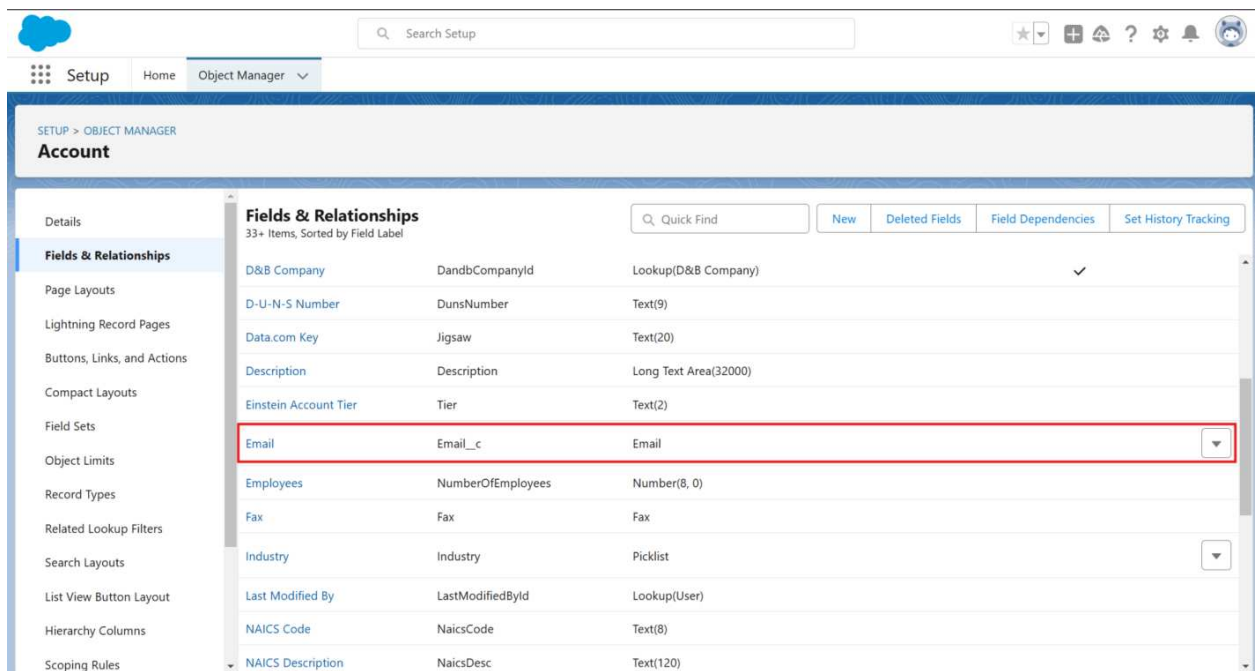
User User Restore

☐	Field Name	Old Value	New Value
☐	Account Name	John Smith	John Smiths
☐	Account Rating	Hot	Warm
☐	Account Type	Prospect	Other

7. Updating Field-Tracking Configurations Following the Deletion of Custom Fields from the Object Configuration

To update the configuration when one or more custom fields of an object are deleted, users must first complete a prerequisite step: navigate to the AFHT Admin tab and create a configuration for the relevant object (e.g., Account). Then, follow the steps below:

- From object manager select account object and create a new custom field.



For Ex- Field Data Type- Email

- Go to the AFHT Admin tab.
- Click on the Edit icon.
- Select the email fields.
- Click the Save button.



Advance Field-Hist...

AFHT Admin

Q Search...

AFHT Admin

Advance Field History Tracker (AFHT)

Field Tracking Configurations

+

S. No.	Object Name ↓	Fields	Timeline View	Actions
1	Contact	Birthdate, Email, First Name, Last Name, Home Phone, Mobile Phone, Other City, Lead Source	Horizontal Timeline View	☒  
2	Account	Account Type, Account Rating, Account Name, Email	Horizontal Timeline View	☒  

- Go to the Account record page then Click on any record, and edit the fields selected for tracking:
 - Account Name
 - Account Type
 - Account Rating
 - Email

Account John Smith

Account Owner

User User

* Account Name

John S

Parent Account

Search Accounts...

Account Number

Account Site

Type

Other

Industry

--None--

Annual Revenue

Email

johns@gmail.com

Rating

Cold

Phone

Fax

Website

Ticker Symbol

Ownership

--None--

Employees

SIC Code

Cancel

Save

ADVANCE FIELD-HISTORY TRACKER

Search...

Advance Field-Hist... AFHT Admin * John S | Account X

Account John S

Related Details **Appohm Field-History Tra...**

Advance Field-History Tracker (AFHT)
Design and Developed by appohm.com

Horizontal Timeline View Refresh

User User Restore

☐	Field Name	Old Value	New Value
☐	Email		johns@gmail.com
☐	Account Name	John Smith	John S

13/2/2025 01:40 pm

13/2/2025 02:05 pm

User User Restore

☐	Field Name	Old Value	New Value
☐	Account Name	John Smiths	John Smith
☐	Account Rating	Warm	Hot
☐	Account Type	Other	Prospect

- Click on the "Gear" icon, then select Setup -> Object Manager
- Click on the Account -> Fields & Relationships

SETUP > OBJECT MANAGER

Account

Details

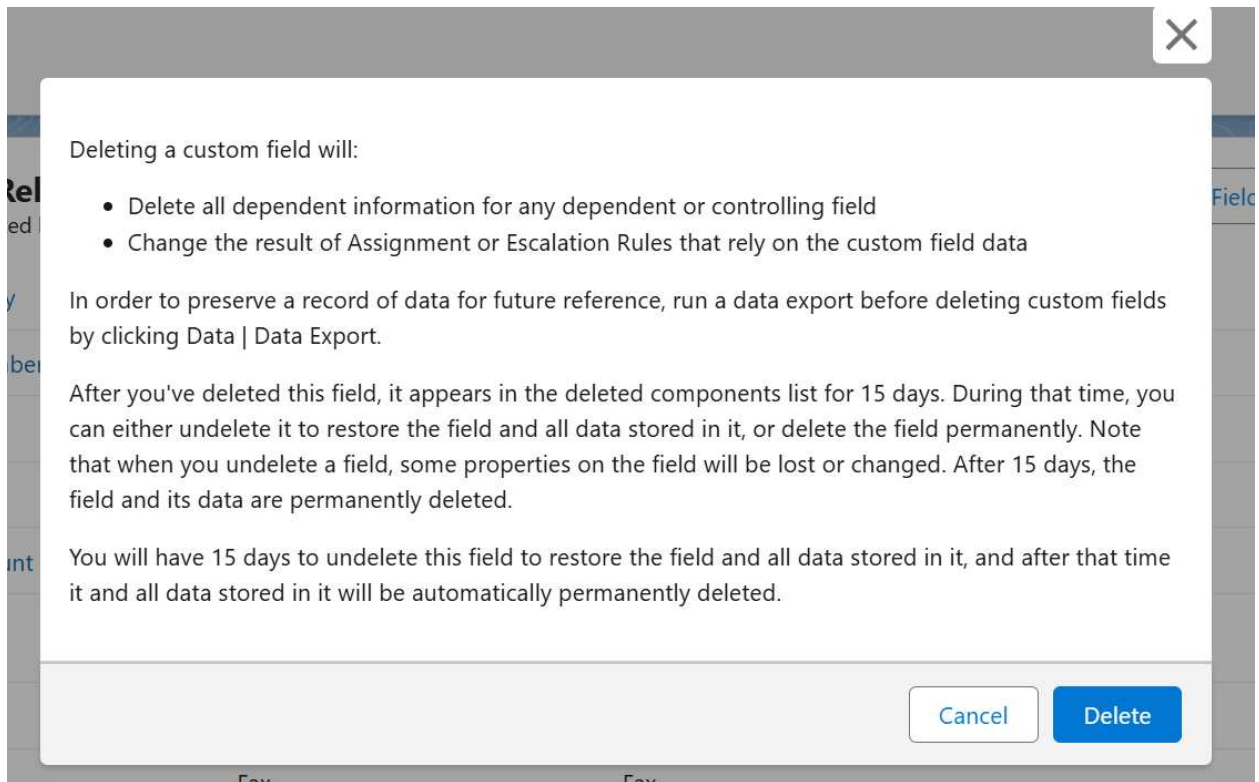
Fields & Relationships
33+ Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

D&B Company	DandbCompanyId	Lookup(D&B Company)	✓
D-U-N-S Number	DunsNumber	Text(9)	
Data.com Key	Jigsaw	Text(20)	
Description	Description	Long Text Area(32000)	
Einstein Account Tier	Tier	Text(2)	
Email	Email__c	Email	
Employees	NumberOfEmployees	Number(8, 0)	
Fax	Fax	Fax	
Industry	Industry	Picklist	

Edit Delete

- Delete the Custom Email field.



- Navigate to the Admin panel and refresh the page. The Account configuration will be displayed with a red background, and a Resolve Conflicts icon will appear successfully under the Action column.

ADVANCE FIELD-HISTORY TRACKER

Search...

Advance Field-Hist... AFHT Admin

AFHT Admin

Advance Field History Tracker (AFHT)

Field Tracking Configurations

Schema Error : Fields API changed or deleted, please fix the highlighted configuration(s) by clicking on "Resolve Conflicts" icon.

S. No.	Object Name	Fields	Timeline View	Actions
1	Contact	Birthdate, Email, First Name, Last Name, Home Phone, Mobile Phone, Other City, Lead Source	Horizontal Timeline View	☒ ☐ ☐ ☐ ☐
2	Account	Account Type, Account Rating, Account Name, Email	Horizontal Timeline View	☒ ☐ ☐ ☐ ☐

- Click on the "Resolve Conflicts" icon to delete the Email field from the Account configuration. The red background and Resolve Conflicts icon will disappear from the Action column.
- Return to the Appohm Field-History Tracker component and select any timeline view.
- Users will be able to track and view the field history of the selected fields in the chosen timeline view.

The screenshot displays the AFHT Admin interface. At the top, there is a search bar and a navigation menu with 'Advance Field-Hist...' and 'AFHT Admin'. Below this, the 'AFHT Admin' section is active, showing 'Advance Field History Tracker (AFHT) Field Tracking Configurations'. A table lists two configurations:

S. No.	Object Name	Fields	Timeline View	Actions
1	Contact	Birthdate, Email, First Name, Last Name, Home Phone, Mobile Phone, Other City, Lead Source	Horizontal Timeline View	☒
2	Account	Account Type, Account Rating, Account Name	Horizontal Timeline View	☒

A red arrow points to the 'Account Name' field in the second row of the table.

Note: Users can restore all other fields without needing to update the configuration or click the "Resolve Conflicts" icon. Additionally, System Administrators can view the history of deleted fields but cannot restore them.


Account
John S

Related

Details

Appohm Field-History Tra...

Advance Field-History Tracker (AFHT)

Design and Developed by appohm.com

Horizontal Timeline View

Refresh

User User

Restore

☐	Field Name	Old Value	New Value
☐	Email		johns@gmail.com
☐	Account Name	John Smith	John S

13/2/2025

01:40 pm


13/2/2025
02:05 pm


User User

Restore

☐	Field Name	Old Value	New Value
☐	Account Name	John Smiths	John Smith
☐	Account Rating	Warm	Hot
☐	Account Type	Other	Prospect

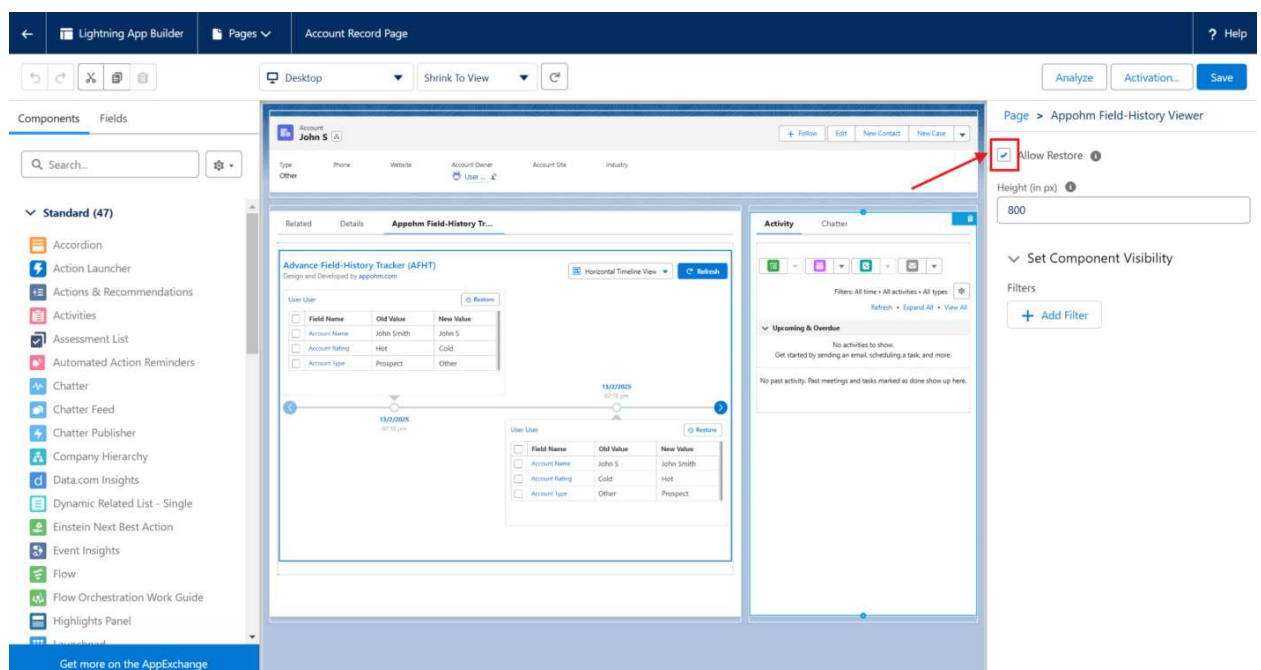
8. Enabling and Disabling the "Restore" Button Across All Views (Tabular / Horizontal / Vertical)

System Administrators have the ability to enable or disable the **Restore** button on the views.

To enable the Restore button

The System Administrator must navigate to the AFHT Admin tab and create a configuration for the relevant object (e.g., Account), then follow the same [steps](#) outlined previously.

- Next, click on the "Appohm Field-History Tracker" component and check the "Allow Restore" checkbox to enable it.



- Save and activate the page.
- Return to the Account record page and edit the fields selected for tracking.
- Navigate to the Appohm Field-History Tracker tab; the checkboxes and Restore button will be visible to users.

ADVANCE FIELD-HISTORY TRACKER

Search...

Advance Field-Hist... AFHT Admin * John S | Account

Account John S

Related Details Appohm Field-History Tra...

Advance Field-History Tracker (AFHT)
Design and Developed by appohm.com

Horizontal Timeline View Refresh

User User Restore

☐	Field Name	Old Value	New Value
☐	Account Name	John Smith	John S
☐	Account Rating	Hot	Cold
☐	Account Type	Prospect	Other

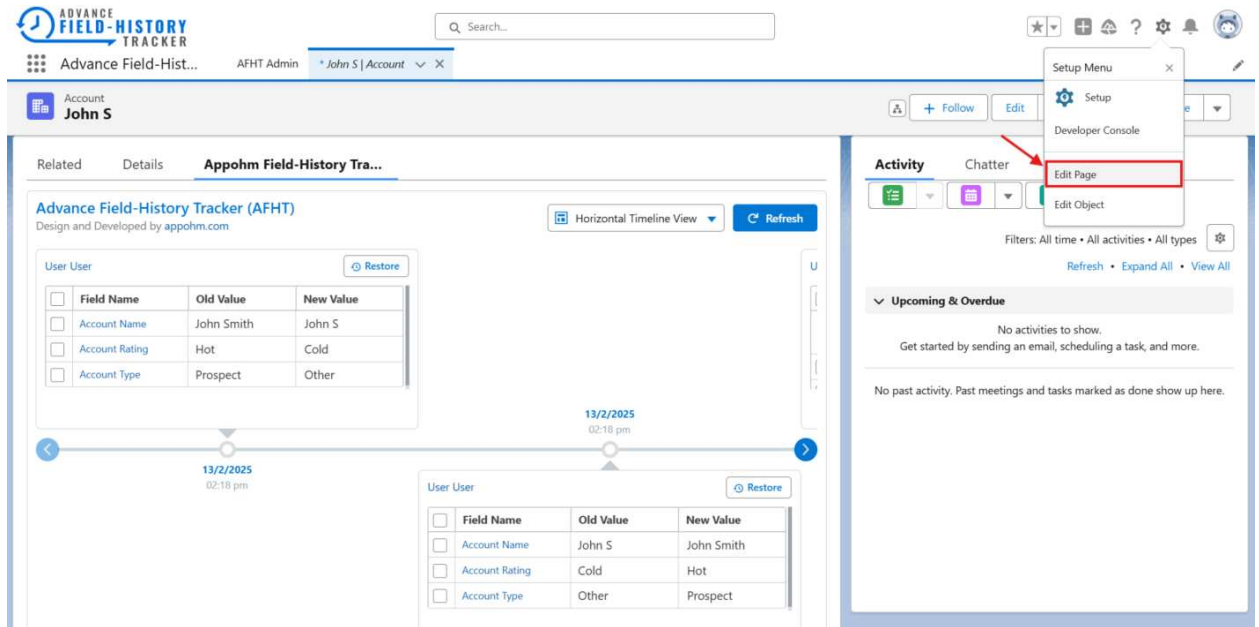
13/2/2025 02:18 pm

User User Restore

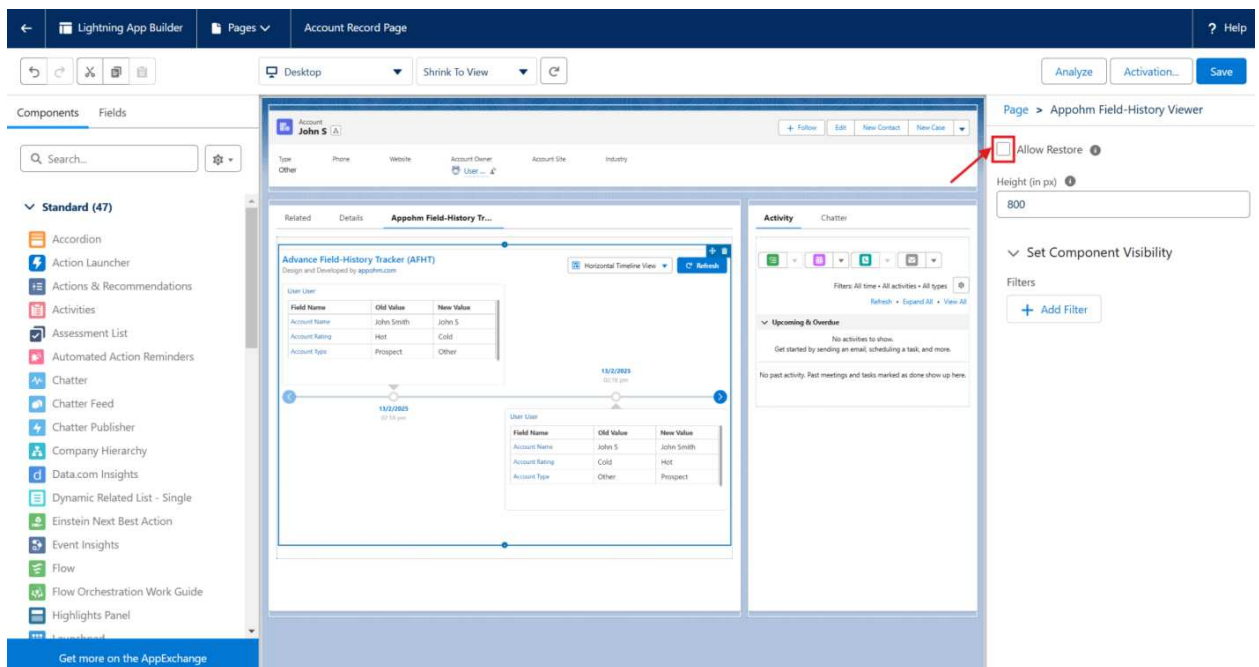
☐	Field Name	Old Value	New Value
☐	Account Name	John S	John Smith
☐	Account Rating	Cold	Hot
☐	Account Type	Other	Prospect

To disable the Restore button

- Stay on the Account record page, again click on the **Gear** icon and then click on the **Edit Page** link.



- Click on the **Appohm Field-History Tracker** tab, then click on the Appohm Field-History Viewer component, and **uncheck/disable** the **Allow Restore** checkbox.



- Save the Page and go back to the Account Record page, Click/Go to Appohm Field-History Tracker tab and select any view. **Checkboxes** and **Restore** buttons won't be visible to the users.

The screenshot displays the 'Advance Field-History Tracker (AFHT)' interface. At the top, there's a search bar and navigation tabs for 'Related', 'Details', and 'Appohm Field-History Tra...'. The main content area shows a horizontal timeline view for a user named 'John S'. The timeline has two points, both dated '13/2/2025' at '02:18 pm'. Each point contains a table with account details. Red arrows point to the 'Account Name' and 'Account Type' fields in the first table.

Advance Field-History Tracker (AFHT)
Design and Developed by appohm.com

Horizontal Timeline View Refresh

User User

Field Name	Old Value	New Value
Account Name	John Smith	John S
Account Rating	Hot	Cold
Account Type	Prospect	Other

13/2/2025 02:18 pm

13/2/2025 02:18 pm

User User

Field Name	Old Value	New Value
Account Name	John S	John Smith
Account Rating	Cold	Hot
Account Type	Other	Prospect

9. Tracking and Viewing Record History of the Text Area (Rich) Field in Appohm Field History Views (Tabular / Horizontal / Vertical)

To view or track the record history of the Text Area (Rich) field type, users must create a custom field of type Text Area (Rich) on the relevant object (e.g., Account). Then, follow the steps below:

1. Navigate to the AFHT Admin tab and click on the "+" icon to add a new configuration.
2. Fill in all the required details:
 - a. **Select Object Name:** Custom Object
 - b. **Search Fields:** Text Area Rich
 - c. **Select Default Timeline View:** Tabular View
3. Click the "Save" button.

Advance Field History Tracker (AFHT)

Field Tracking Configurations

S. No.	Object Name	Fields	Timeline View	Actions
1	Contact	Birthdate, Email, First Name, Last Name, Home Phone, Mobile Phone, Other City, Lead Source	Horizontal Timeline View	☒
2	Account	Account Type, Account Rating, Account Name	Horizontal Timeline View	☒

Add Field Tracking Configuration

Select Object Name

Search Field ⓘ

Select Default Timeline View

☐ Currency
☐ Custom Object Name
☐ Owner ID
☒ Text Are Rich

- The configuration should be saved successfully, and all details will be displayed on the Admin Panel under the Field Tracking Configuration section.

Advance Field-Hist...

AFHT Admin

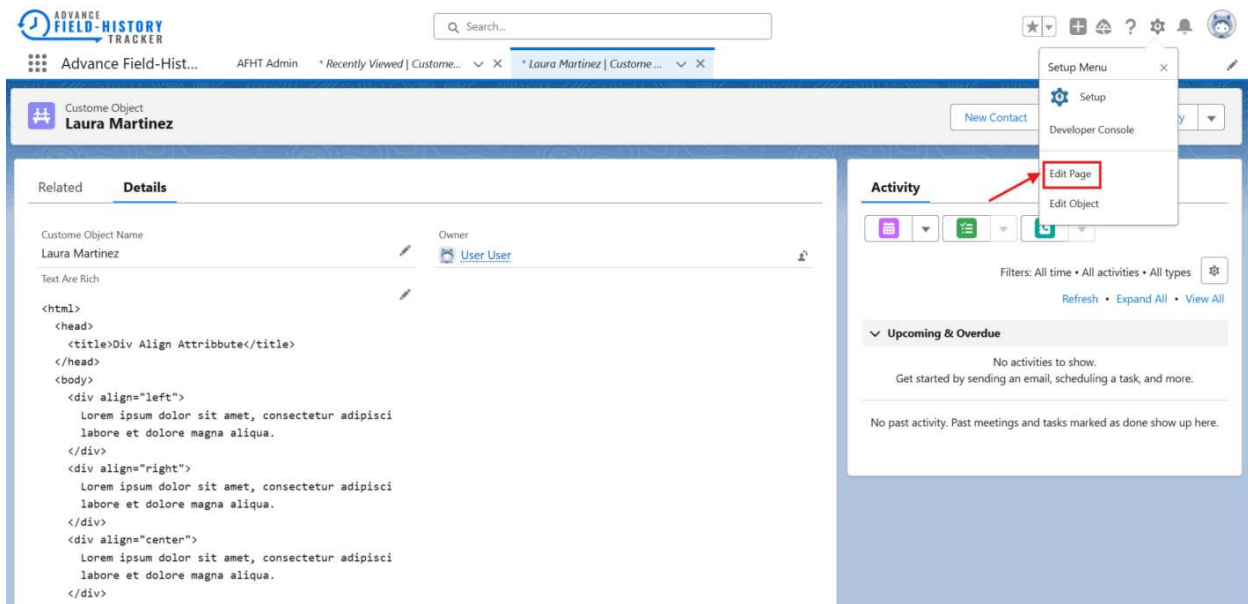
AFHT Admin

Advance Field History Tracker (AFHT)

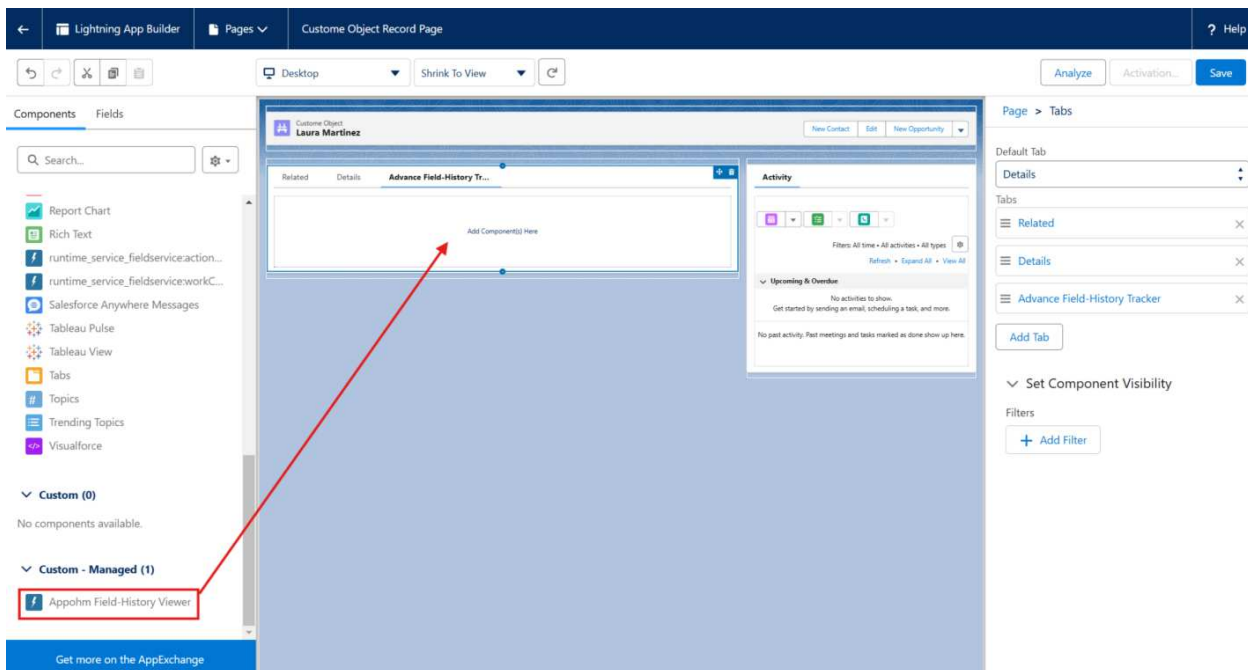
Field Tracking Configurations

S. No.	Object Name ↓	Fields	Timeline View	Actions
1	Custom Object	Text Are Rich	Tabular View	☒ ☐ ☐ ☐
2	Contact	Birthdate, Email, First Name, Last Name, Home Phone, Mobile Phone, Other City, Lead Source	Horizontal Timeline View	☒ ☐ ☐ ☐
3	Account	Account Type, Account Rating, Account Name	Horizontal Timeline View	☒ ☐ ☐ ☐

- Navigate to any Custom Object record page.
- Click the "Gear" icon, then select the "Edit Page" link.



- Create a new "Tab" and Drag the custom component "Appohm Field-History Viewer" and drop on it and then Save and Activate the page.



- Go back to the **Custom Object record page** and edit the Rich text area field (for ex. add a text or HTML Tag/upload an image) and then click on the **Save** button.

* Custom Object Name

Laura Martinez

Owner

User User

Text Area Rich

Salesforce Sans 12

B I U

Link Image Text

```
<div align="right">
  Lorem ipsum dolor sit amet, consectetur adipisc
  labore et dolore magna aliqua.
</div>
<div align="center">
  Lorem ipsum dolor sit amet, consectetur adipisc
  labore et dolore magna aliqua.
</div>
</body>
</html>
```

Currency

Cancel

Save

- Click/Go to the “Appohm Field-History Tracker” tab, select Tabular view, click on the Refresh button, and then click on the Old Value or New Value icons.

ADVANCE FIELD-HISTORY TRACKER

Search...

Advance Field-Hist... AFHT Admin * Laura Martínez | Custome ...

Custome Object
Laura Martinez

Related Details **Advance Field-History Tra...**

Advance Field-History Tracker (AFHT)
Design and Developed by appohm.com

Tabular View Refresh

Group By CreatedDate	Field Name	Old Value	New Value
User User 13/2/2025, 02:56 pm Restore	☐ Text Are Rich		

- Users will be redirected to the record history page, where the old and new rich text values will be saved and displayed in the "Old Value Rich Text" and "New Value Rich Text" fields.



Related

Details

AFHT Record History

RH-000057

Owner

User User



User

User User



Old Value



New Value



Field Name

Text Are Rich



Item Id

a03H4000002QYTKIAO



Old Value Rich Text



```
<html>
<head>
  <title>Div Align Attribute</title>
</head>
<body>
  <div align="left">
    Lorem ipsum dolor sit amet, consectetur adipisci
    labore et dolore magna aliqua.
  </div>
  <div align="right">
    Lorem ipsum dolor sit amet, consectetur adipisci
    labore et dolore magna aliqua.
  </div>
  <div align="center">
    Lorem ipsum dolor sit amet, consectetur adipisci
    labore et dolore magna aliqua.
  </div>
</body>
</html>
```

New Value Rich Text



```
<html>
<body>
  <div align="left">
    Lorem ipsum dolor sit amet, consectetur adipisci
    labore et dolore magna aliqua.
  </div>
</body>
</html>
```

Created By

User User, 13/02/2025, 4:39 pm

Last Modified By

User User, 13/02/2025, 4:39 pm

- Again go to the **Appohm Field-History Tracker** tab and select/switch to and **Horizontal** and **Vertical** views. Users will be successfully able to track/view the Text area (Rich) field data/details on both views.

Horizontal Timeline View-

The screenshot shows the 'Advance Field-History Tracker (AFHT)' interface. At the top, there's a search bar and a navigation bar with tabs for 'Advance Field-Hist...', 'AFHT Admin', and '* Laura Martinez | Custome...'. Below the navigation bar, the main content area is titled 'Custom Object Laura Martinez'. The interface has two tabs: 'Related' and 'Details', with 'Details' being the active tab. The main content area displays the title 'Advance Field-History Tracker (AFHT)' and the subtitle 'Design and Developed by appohm.com'. On the right, there's a dropdown menu set to 'Horizontal Timeline View' and a 'Refresh' button. The main content area shows a table with the following data:

Field Name	Old Value	New Value
Text Are Rich		

Below the table, there's a timeline with a date and time marker: '13/2/2025 04:39 pm'.

Vertical Timeline View-



Search...

Advance Field-Hist...AFHT Admin* Laura Martinez | Custome... X

Custom Object
Laura Martinez

RelatedDetails

Advance Field-History Tra...

Advance Field-History Tracker (AFHT)
Design and Developed by appohm.com

Vertical Timeline View

Refresh

User User

Restore

☐	Field Name	Old Value	New Value
☐	Text Are Rich		

13/2/2025
04:39 pm

10. Verifying Compatibility of AFHT with Salesforce Flows

Users have the ability to track and view the record history of configured fields that have been updated using Salesforce Flows.

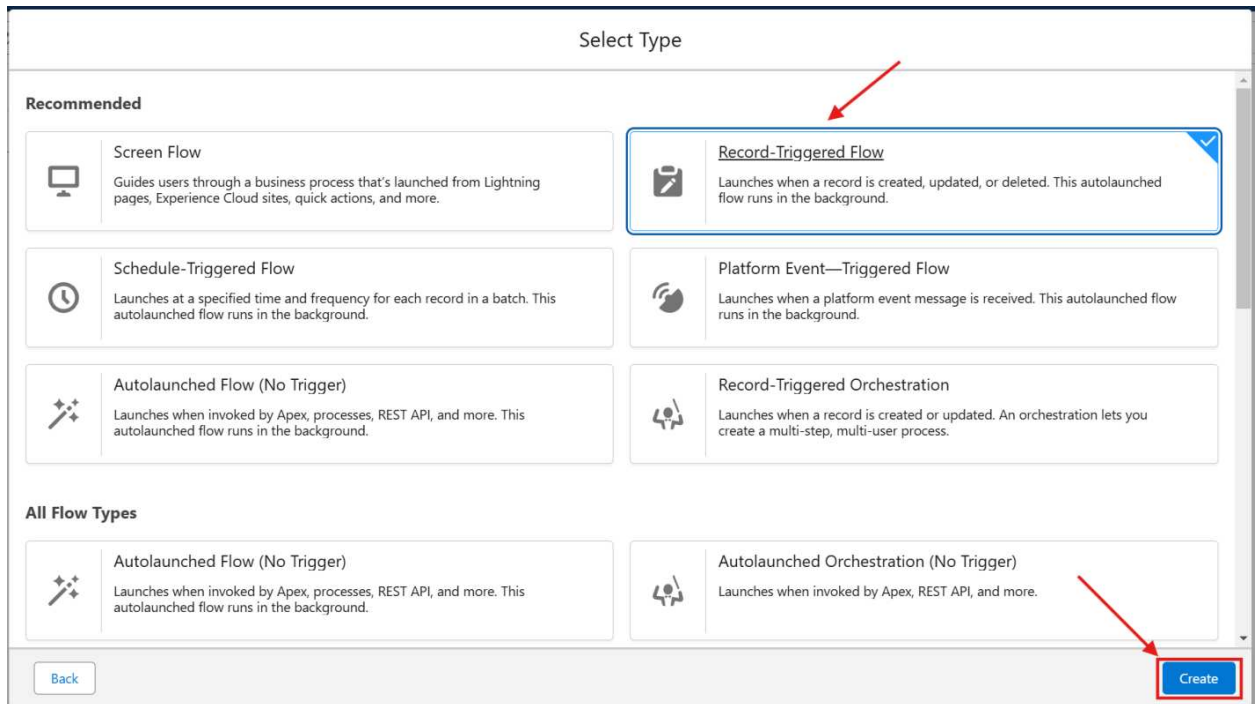
To track the record history using Flows, Users have to go to the AFHT Admin tab and create a configuration with any object (for ex. **Account**) and then follow the below steps,

- Go to **Salesforce Setup**, In Quick Find / Search box, search for **Flows** and then click on it.

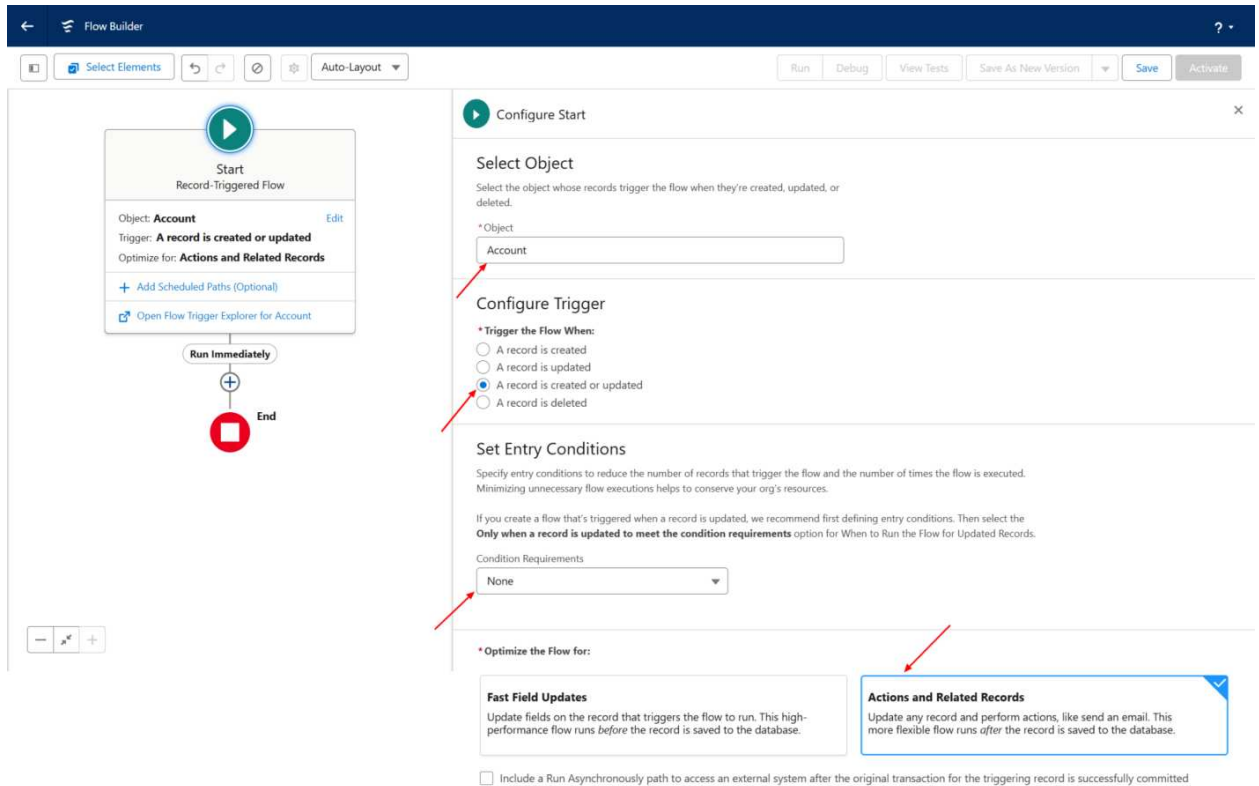
The image shows two screenshots from the Salesforce interface. The top screenshot is the 'AFHT Admin' page, which displays a table of 'Field Tracking Configurations'. The table has columns for S. No., Object Name, Fields, Timeline View, and Actions. It lists three configurations: 1. Custom Object (Text Area Rich, Tabular View), 2. Contact (Birthdate, Email, First Name, Last Name, Home Phone, Mobile Phone, Other City, Lead Source, Horizontal Timeline View), and 3. Account (Account Type, Account Rating, Account Name, Horizontal Timeline View). A red arrow points to the 'Setup' option in the top navigation menu. The bottom screenshot is the 'Setup' page, where the search bar contains 'flows'. The 'Flows' option is highlighted in the left sidebar under 'Process Automation'. The main content area shows a 'Home' dashboard with cards for 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Real-time Collaborative Docs'.

S. No.	Object Name	Fields	Timeline View	Actions
1	Custom Object	Text Area Rich	Tabular View	✓ ✕ ✎
2	Contact	Birthdate, Email, First Name, Last Name, Home Phone, Mobile Phone, Other City, Lead Source	Horizontal Timeline View	✓ ✕ ✎
3	Account	Account Type, Account Rating, Account Name	Horizontal Timeline View	✓ ✕ ✎

- Click on the **New Rule** button, select a template (for ex. **Record-Triggered Flow**) and click on the **Create** button.



- Configure Start** pop-up will be opened/displayed. Fill out all the details for ex.
Object: Account
Configure Trigger - Trigger the Flow When: A record is created or updated.
Set Entry Conditions - Condition Requirements: None
Optimize the Flow for Actions and Related Records
and then click on the **Done** button.



- Switch from "Auto-Layout" to "Free Form", Drag the "Update Records" element from the Toolbox, and Drop it on the builder. A new Update popup will be opened, Fill in all the details

for ex.

Label: Record Update

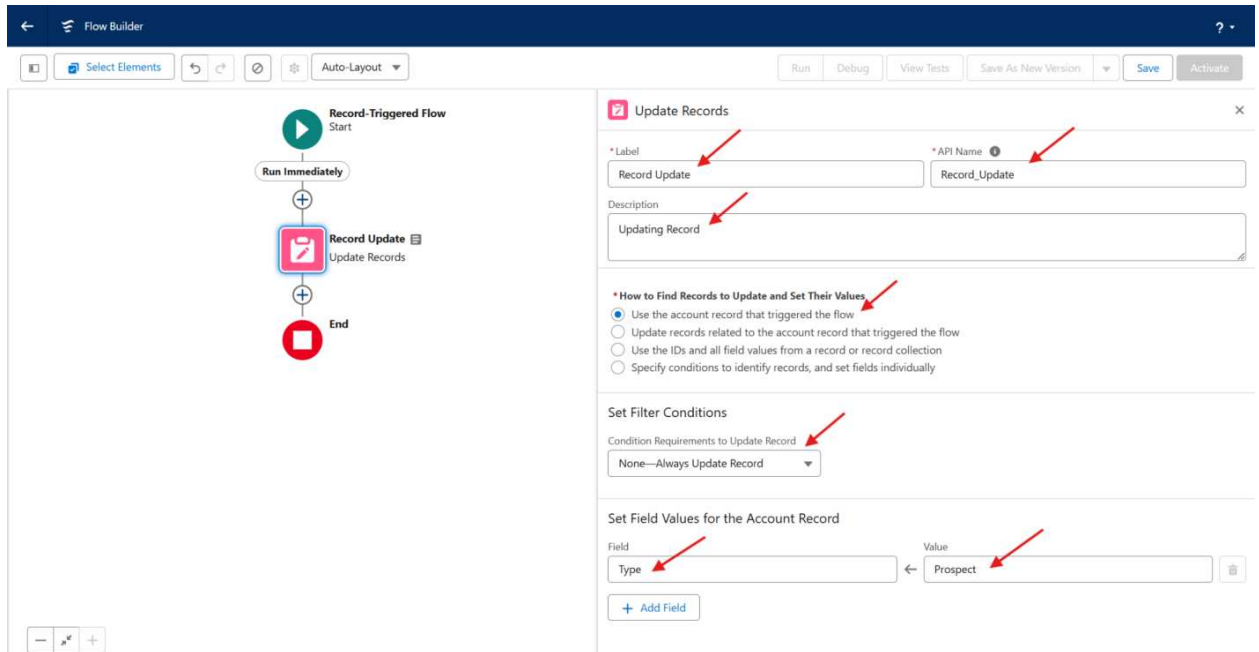
API Name: Record_Update

Description: Updating Record

How to Find Records to Update and Set Their Values: Use the account record that triggered the flow.

Set Filter Conditions: None--Always Update Record

Set Field Values for the Account Record: Field - Account Type, Value - Prospect and then click on the "Done" button.



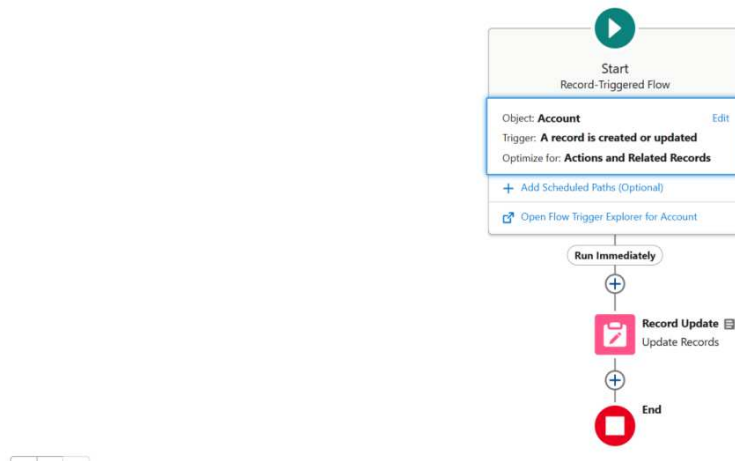
- Click on the **Save** button, and Save the Flow pop-up will be opened, Fill in all the details for ex.

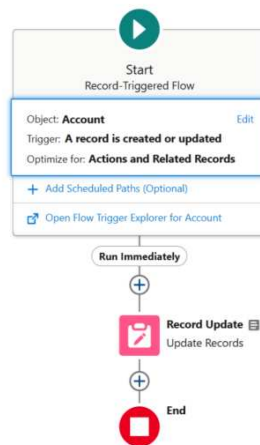
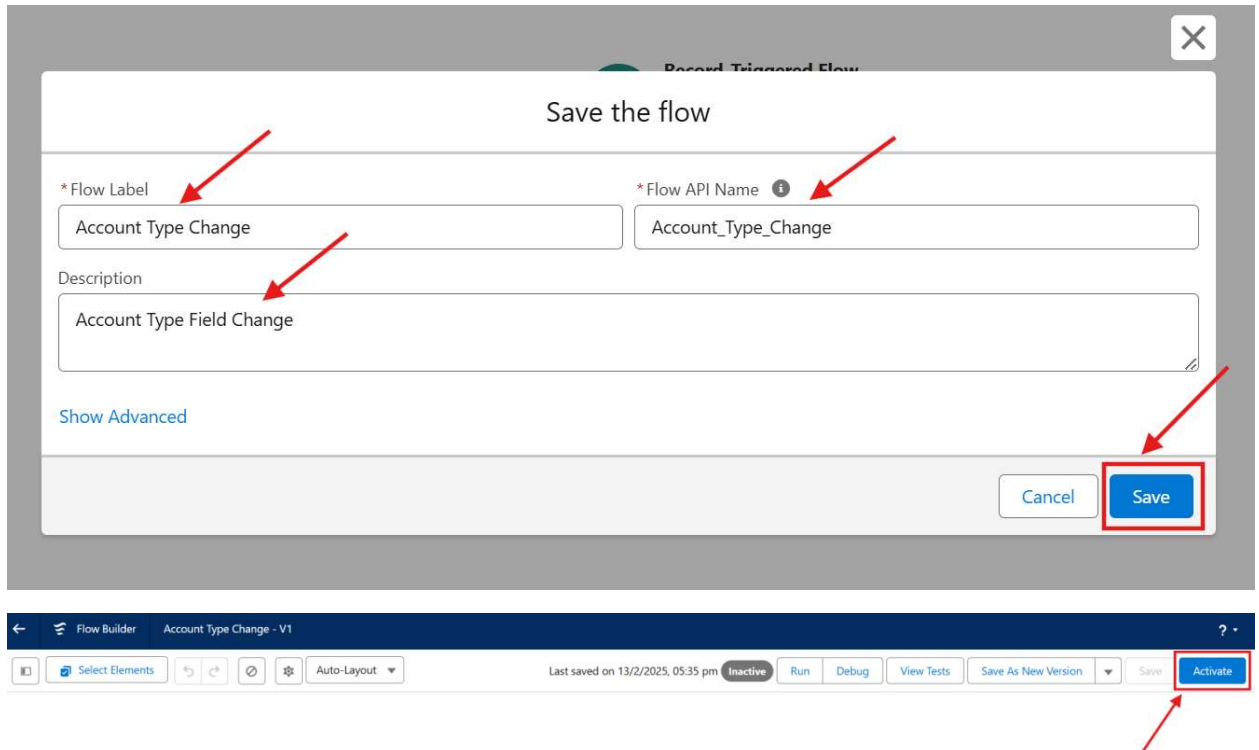
Flow Label: Account Type change

Flow API Name: Account_Type_change

Description: Account Type field change

click on the **Save** button and then click on the **Activate** button.





The flow will be successfully created and displayed on the Flows page.

Try the Automation Lightning App!

These new features are available only in the Automation Lightning app:

- Search for automations
- Sort your list views with more options
- Organize your automations with categories and subcategories

If you don't see the app in the App Launcher, check that Enable the Automation Lightning App is selected in [Process Automation Settings](#).

Flow Definitions

All Flows

23 items • Sorted by Flow Label • Filtered by All flow definitions • Updated a few seconds ago

Flow Label ↑	Process Type	Trigger	A...	Te...	Package State	Package Name	Last...	Last Modified ...
Account Type Change	Autolaunched Flow	Record—Run After ...	☒	☐	Unmanaged		User Us...	13/02/2025, 5
Advance Field History Tracker No...	Autolaunched Flow		☒	☐	Managed-Installed	Advance Field-Hist...	User Us...	12/02/2025, 2
AFHT Version Expired Notification	Autolaunched Flow		☒	☐	Managed-Installed	Advance Field-Hist...	User Us...	12/02/2025, 2
Basic Approval Request	Flow Orchestration ...		☒	☒	Managed-Installed			
Cancel Item Flow	Screen Flow		☐	☒	Managed-Installed			
Check Service Plan Eligibility	Autolaunched Flow		☐	☒	Managed-Installed			

- Go to any Account Record page, Click on the **Edit** button, then update any field (for ex. change Account rating to **Hot**) and click on the **Save** button.

ADVANCE FIELD-HISTORY TRACKER

Search...

Advance Field-Hist... AFHT Admin * Emma Scott | Account X * Emma Scott | Account X

Account
Emma Scott

Related **Details** Appohm Field-History Tracker

* = Required Information

Account Owner
User User

* Account Name
Emma Scott

Parent Account
Search Accounts...

Account Number

Account Site

Type
Other

Industry
--None--

Annual Revenue

Rating
Hot

Phone

Fax

Website

Ticker Symbol

Ownership
--None--

Employees

SIC Code

Cancel Save

- Click/Go to the **Appohm Field-History Tracker** tab, and click on the **Refresh** button, you will notice that the **Account Type** record history is automatically tracked and updated to **Prospect**.



Account
Emma Scott

Type
Prospect

Phone

Website

Account Owner
User User

Account Site

Industry

Related

Details

Appohm Field-History Tra...

Advance Field-History Tracker (AFHT)

Design and Developed by appohm.com

Horizontal Timeline View

Refresh

User User

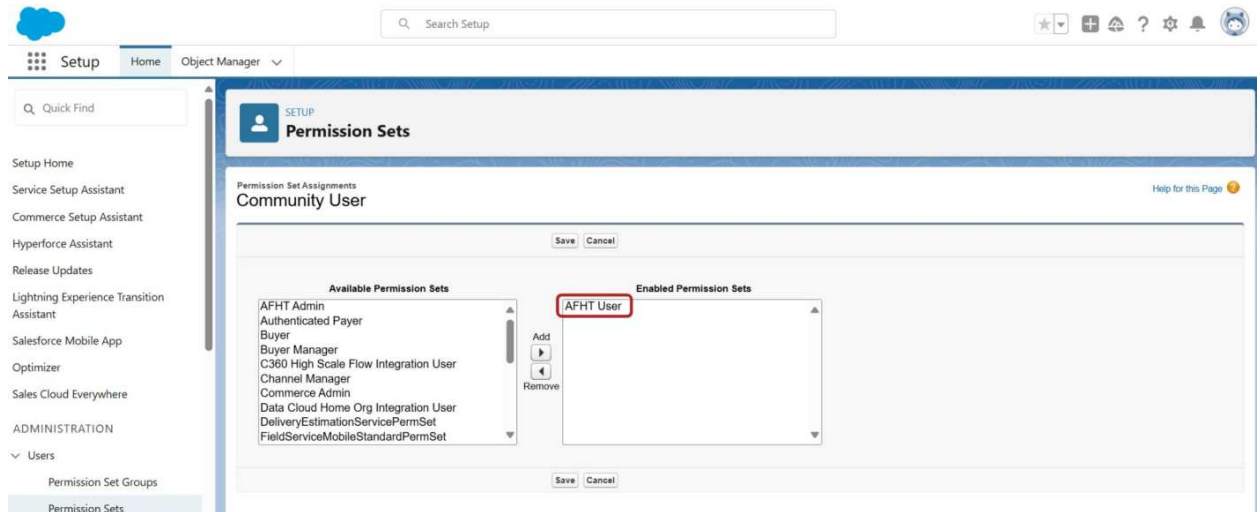
Field Name	Old Value	New Value
Account Type	Other	Prospect
Account Rating	Warm	Hot

13/2/2025
05:47 pm

11.Managing Field Tracking for Community User

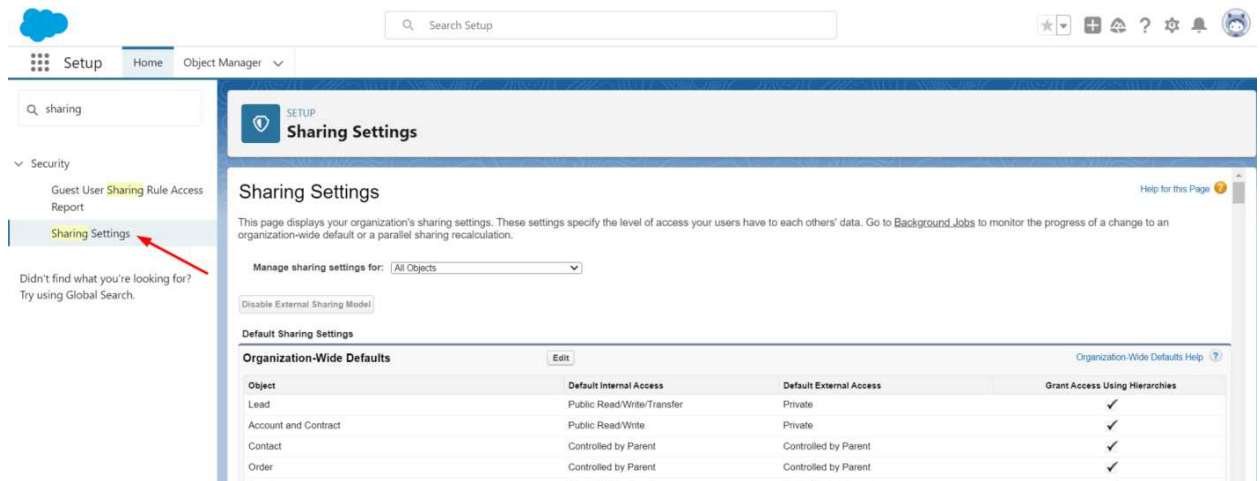
For community users, a sharing rule must be created for the AFHT_Configuration__c object. Here are the steps:

Step 1: Assign AFHT_User PermissionSet to Community User



Step 2: Create a Sharing Setting

1. Go to **Setup** → **Sharing Settings**.



2. Under **AFHT Configurations Sharing Rules**, click on **New**.



3. Fill in all the required details.

Label: AFHT Community Rule

Rule Name: AFHT_Community_Rule

Select your rule type: Based on criteria

Criteria: Field- Owner Id, **Operator** - not equal to

Share with: Portal Roles, UUser Customer person Account

Access Level: Read/Write

4. Click **Save**.

AFHT Configurations Sharing Rules

New

Recalculate

AFHT Configurations Sharing Rules Help ?

Action	Criteria	Shared With	Access Level
Edit Del	AFHT Configurations: Owner NOT EQUAL TO	Portal Role: UUUser Customer Person Account	Read/Write

Step 3: Grant access to **AFHT Configurations** and **AFHT Record Histories** in the profile of a community user.

Custom Object Permissions						
	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All i	Modify All i
AFHT Configurations	☒	☒	☒	☒		
AFHT Record Histories	☒	☒	☒	☒		

Support

If you have any issue or query, kindly contact us at support@appohm.com or raise a ticket [here](#)