

Easy Tracking

Instructional Setup Guide

1. Allocate licenses

- a. Navigate to Install Package and click 'Manage Licenses'

Uninstall Manage Licenses		Easy Tracking	HQL	1.0	hql
Description Support field track on most standard objects and all custom objects					

- b. Click 'Add Users' and assign users who will use Easy Tracking

Package Details

Easy Tracking

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Enable for Platform Integrations			
Package Name	Easy Tracking	Publisher	HQL
Status	Trial	Allowed Licenses	5
Expiration Date	2/7/2024	Used Licenses	1
Enabled for Platform Integrations	☐		

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S

Licensed Users					Add Users	Remove Multiple Users
Action	Full Name ↑	Role	Active	Profile		
Remove	Le, Huy	Admin	☒	System Administrator		

2. Assign permission set

[Easy Tracking for Admin](#)

For admins who need to manage easy tracking settings.
Must have full Salesforce license.

Salesforce

[Easy Tracking for Users](#)

For standard users

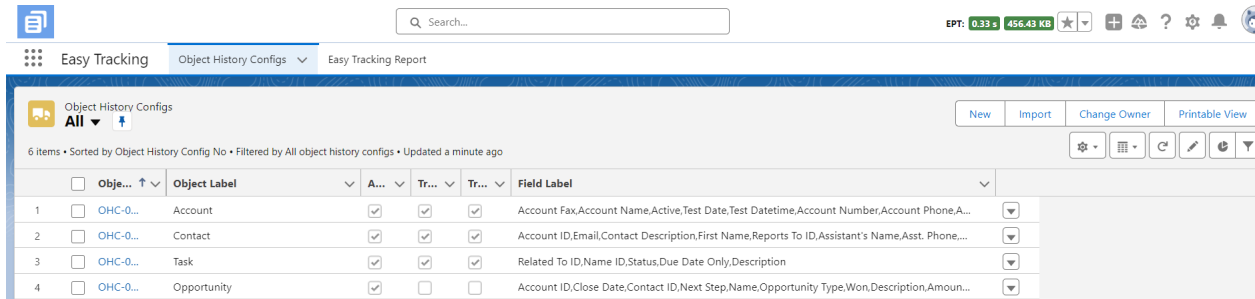
- a. Easy Tracking for Admin - this permission set provide access to:
- Be tracked by Easy Tracking.
 - Manage settings of Easy Tracking.
 - Run report.
 - Download report to csv.
 - Send report to other users.

Recommend: should assign System Admin to the permission set.

- b. Easy Tracking for Users - this permission set provide access to:
- Be tracked by Easy Tracking.

3. Setup Object for tracking

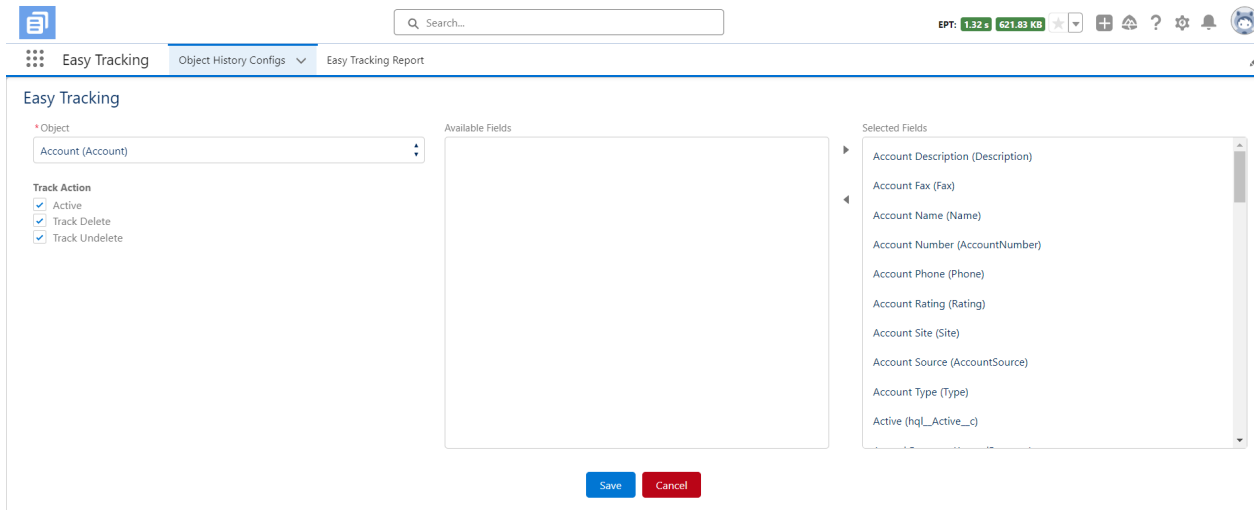
Navigate to Easy Tracking app and click New to create new Object config



The screenshot shows the Easy Tracking app interface. At the top, there's a search bar and navigation tabs for 'Easy Tracking', 'Object History Configs', and 'Easy Tracking Report'. Below the tabs, there's a table titled 'Object History Configs' with 6 items. The table has columns for 'Object Label', 'A...', 'Tr...', 'Tr...', and 'Field Label'. The first four rows are visible, showing configurations for 'Account', 'Contact', 'Task', and 'Opportunity'.

	Object Label	A...	Tr...	Tr...	Field Label
1	Account	☒	☒	☒	Account Fax,Account Name,Active,Test Date,Test Datetime,Account Number,Account Phone,A...
2	Contact	☒	☒	☒	Account ID,Email,Contact Description,First Name,Reports To ID,Assistant's Name,Asst. Phone...
3	Task	☒	☒	☒	Related To ID,Name ID,Status,Due Date Only,Description
4	Opportunity	☒	☐	☐	Account ID,Close Date,Contact ID,Next Step,Name,Opportunity Type,Won,Description,Amoun...

Select object and fields to be tracked



The screenshot shows the 'Easy Tracking' configuration screen. On the left, there's a dropdown for 'Object' with 'Account (Account)' selected. Below it, there's a 'Track Action' section with checkboxes for 'Active', 'Track Delete', and 'Track Undelete'. In the center, there's an 'Available Fields' section which is currently empty. On the right, there's a 'Selected Fields' section with a list of fields: 'Account Description (Description)', 'Account Fax (Fax)', 'Account Name (Name)', 'Account Number (AccountNumber)', 'Account Phone (Phone)', 'Account Rating (Rating)', 'Account Site (Site)', 'Account Source (AccountSource)', 'Account Type (Type)', and 'Active (hql_Active__c)'. At the bottom, there are 'Save' and 'Cancel' buttons.

4. Add Record History to record page

The screenshot shows a Salesforce record page for an 'AGRICULTURE' account. The left sidebar contains a 'Components' panel with a search bar and a list of components: Standard (5), Custom (1), and Custom - Managed (0). The 'Standard' section includes 'Actions & Recommendations', 'Recommendations', 'Record Detail', 'Record Detail - Mobile', and 'Related Record'. The 'Custom' section includes 'recordHistory'. The 'Custom - Managed' section is empty. The main content area displays the account details, including 'Annual Revenue', 'SIC Code', 'Test Date', 'Test Date Time', 'Billing Address', 'Shipping Address', 'Customer Priority', 'SLA', 'SLA Expiration Date', 'SLA Serial Number', 'Number of Locations', 'Upsell Opportunity', 'Active', 'Yes', 'Created By', 'Last Modified By', 'Description', 'account desc', and 'Billing'. Below the account details is the 'Account History' component, which shows a table of record changes. The table has columns for 'Date', 'User', 'Action', 'Field', 'Old Value', and 'New Value'. The table contains three rows of data. The 'Account History' component is highlighted with a blue box, and a callout points to it with the text 'Display a custom header at the head of record history component'. The right sidebar shows the 'Page' configuration for 'recordHistory', with options to 'Show header?' (checked), 'Header label' (Account History), and 'Set Component Visibility' (Add Filter).

Date	User	Action	Field	Old Value	New Value
18/47, 31/12/2023	Le Huy	Updated	Industry		Agriculture
18/47, 31/12/2023	Le Huy	Updated	Annual Revenue	90000000	90000000
18/47, 31/12/2023	Le Huy	Updated	Account Rating	Warm	Warm
20/40, 30/12/2023	Le Huy	Updated	Parent Account ID		Account 3

5. Support for Classic

- Create a Visualforce page for the object
Navigate to Object Config and copy code from "Visualforce Page Code"

The screenshot shows the 'Object History Configs' page in Salesforce. The page has a header with 'Easy Tracking' and 'Object History Configs'. Below the header is a section titled 'Object History Config' with the ID 'OHC-0006'. The main content area displays the 'Visualforce Page Code' for the 'Easy Tracking' object. The code is highlighted with a red box and contains the following Visualforce markup and Apex logic:

```
<apex:page standardController="Account">
<apex:includeLightning />
<div id="lightning"/>
<script>
$Lightning.use("hql:EasyTrackApp", function() {
$Lightning.createComponent("hql:recordHistory",
{
"recordId" : "{!CASESAFEID($CurrentPage.parameters.id)}"
},
"lightning",
function(cmp) {
});
});
</script>
</apex:page>
```

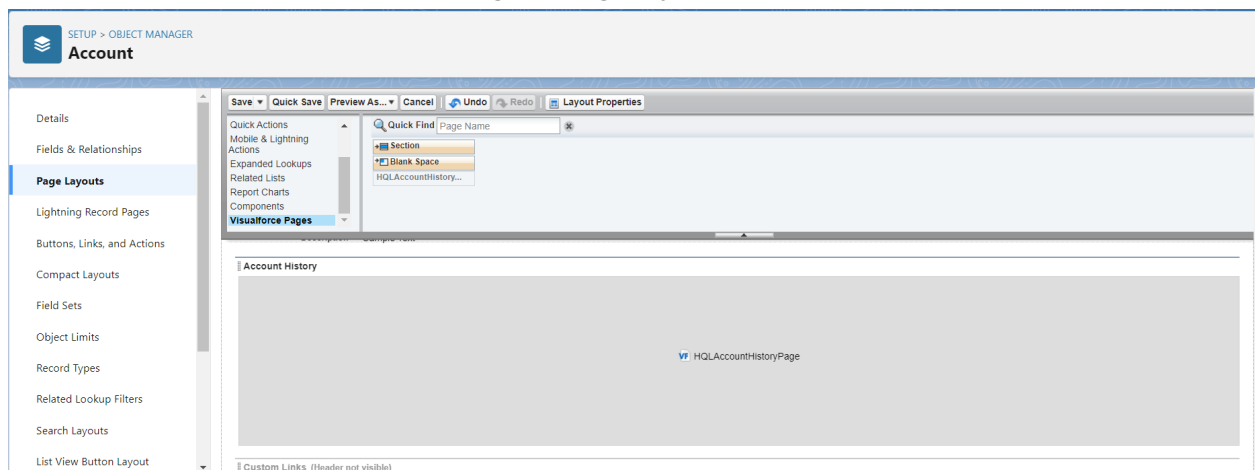
The code is followed by a block of Apex logic:

```
{rec});
insert records;
} catch(Exception ex) {
}
}
}
```

Go to Developer Console and create a Visualforce page with above code

```
1 <apex:page standardController="Account">
2 <apex:includeLightning />
3 <div id="lightning" />
4 <script>
5 $Lightning.use("hql:EasyTrackApp", function() {
6 $Lightning.createComponent("hql:recordHistory",
7 {
8 "recordId" : "{!CASESAFEID($CurrentPage.parameters.id)}"
9 },
10 "lightning",
11 function(cmp) {
12 });
13 });
14 </script>
15 </apex:page>
```

b. Add the Visualforce page to page layout



Remember set Height of page and check Show scrollbars

