



Installation and Setup Guide

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1. Introduction

BeanTrail is a native Force.com utility that facilitates Salesforce users to setup and view field data modifications and history of deleted records within Salesforce without consuming org's Data Storage space.

The historical log of field modifications capture changes for all types of fields including formula, text area, roll-up summary, multi-select picklist and cross-object formula fields. The tracked history is

available for viewing and does not impose restrictions on the timeline i.e. field history data can be retained forever.

Additionally, the application has improved the field history tracking by sending email notifications to users on critical field updates and on field updates that satisfy the special action rules if created. The audited data representation has been enhanced to showcase the field history of deleted records as well. Also the application has out of the box reports and dashboards.

2. Installing BeanTrail

2.1 Installation Prerequisites

#	Prerequisite	Notes/Comments
1	Active Salesforce user account on any supported Salesforce editions	
2	User Profile permissions - o 'Download AppExchange Packages' set to true - o 'Author Apex' set to true	
3	'Lock sessions to the IP address from which they originated' should be disabled in session settings.	Once you have disabled the settings, ensure to re-login before proceeding with installation.
4	The user's language should be set to English.	
5	Enable "Salesforce CRM content" from the quick find box.	

2.2 AppExchange Installation and Steps

Follow the steps mentioned below to successfully install BeanTrail Application in your Salesforce org:

1. Locate 'BeanTrail' application in your Salesforce org via AppExchange.
2. Click on  to start the installation process.
3. Click on  to log into the Salesforce org.

4. Enter your instance credentials.
5. Click on  to log into the Salesforce org.
6. Select an instance from the given options 'Install in production' or 'Install in sandbox'.
7. Agree to the terms and conditions, click on .

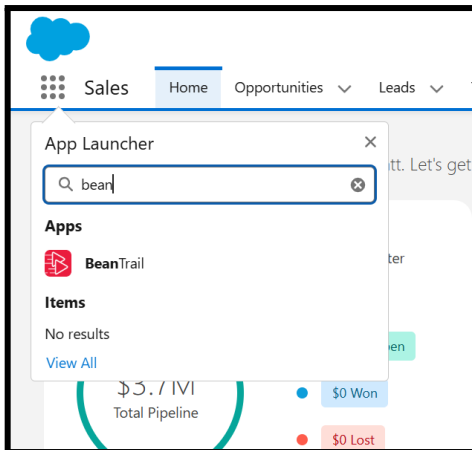
Once done with the installation, please follow the configuration steps to begin tracking of historical information.

2.3 Bespoke Installation

For more Information, please contact beantrail@infobeans.ai

3. Application Setup & Configuration

Go to the App launcher and select 'BeanTrail'.



6. Finalize BeanTrail Package Setup

- Open the BeanTrail app from App Launcher
- Click on Setup Page tab
- Select the object and its fields that you want to track.
- Click Save.

3.1 Adding Users to track Field History

While installing the BeanTrail app, if the access has been granted to system admin users only and if you would like to extend access to non-system admin users at later point of time, there are two

ways to provide the access -

- **Permission set** - This is an easy and recommended option to provide access to non-system admin users. Apply these 2 permission sets to the user's profile.
 - BeanTrail admin permission to user -: This permission set gives all the necessary permissions regarding BeanTrail to the user.
 - BeanTrail track permission to user -: This permission set will allow to track data of other users but the other users can't use the application to view field/deleted history.
- **Manual setting** - If in case you have hit the permission set limits and you want to provide access, you can update the user's profile manually and provide access to the components as instructed below.
 1. Enable 'Visible' Checkbox for BeanTrail App.
 2. The 'View Field History' and 'Setup Field History' tab should be 'Default On'.
 3. **Grant access to the following Visualforce Pages.**
 - UFHT.CreateRemoteSiteSetting
 - 4 . **Grant access to following classes.**
 - UFHT.AttachmentContentWrapper
 - UFHT.ConfigurationController
 - UFHT.ConfigureController
 - UFHT.DataDecryptBatch
 - UFHT.DataEncryptBatch
 - UFHT.DataProviderForViewData
 - UFHT.DateFilterWrapper
 - UFHT.DeleteDataFromReportDataSource
 - UFHT.DeleteDataQueueBatch
 - UFHT.ConfigureControllerLwc.cls
 - UFHT.ConfigureControllerLwcTest.cls
 - UFHT.FilterConfigurationControllerRunLwc.cls
 - UFHT.FilterConfigurationControllerRunLwcTest.cls
 - UFHT.SpecialActionControllerLwc.cls
 - UFHT.SpecialActionControllerLwcTest.cls
 - UFHT.UltraSetupControllerLwc.cls
 - UFHT.UltraSetupControllerLwcTest.cls
 - UFHT.UFHTRecordCount
 - UFHT.UltraSetupController
 - UFHT.UltraTrackUtility
 - UFHT.UltraTrackWrapper
 - UFHT.UnauthorizedEndpointResponse

- UFHT.UpdateExistingFileBatch
- UFHT.UserDisplayAndSelectionController
- UFHT.UltraTrackUtilityLightningTest.cls
- UFHT.DataProviderForViewDataLightning.cls
- UFHT.DataProviderForViewDataLightningTest.cls
- UFHT.UltraTrackUtilityLightning.cls
- UFHT.DeploymentStatusTriggerWrapper
- UFHT.DisplayHistoryWrapper
- UFHT.DynamicTriggerGenerator
- UFHT.DynamicTriggerGenericHandler
- UFHT.ExportDataFromAttachment
- UFHT.ExportDataFromAttachBatch
- UFHT.FieldAuditWriter

- UFHT.Field HistoryWrapper
- UFHT.FieldsWithPicklistWrapper
- UFHT.FilesFieldAuditWriter
- UFHT.FileWrapper
- UFHT.FilterConfigurationController
- UFHT.FilterConfigurationControllerRun
- UFHT.HexUtil
- UFHT.HistoryTrackingBatch
- UFHT.HistoryWrapper
- UFHT.InvalidProtocolResponse
- UFHT.LMSConfigManager
- UFHT.LicenseCheckScheduler
- UFHT.LicenseMgmtCalloutsMock
- UFHT.LmaCommunicationManager
- UFHT.LMSConstants
- UFHT.MetadataService
- UFHT.MockHttpResponseDyanamicTriggerGenerator
- UFHT.MockHttpResponseForSetupController1
- UFHT.MockHttpResponseForSetupController2
- UFHT.MockHttpResponseTriggerActivator
- UFHT.MultiselectController
- UFHT.PageMessageWrapper
- UFHT.PostInstallUtil
- UFHT.PostUninstallUtil
- UFHT.Puff
- UFHT.RelatedListComponentExtension
- UFHT.TestUtil
- UFHT.TriggerGenerationException
- UFHT.UFHTConstants
- UFHT.UFHTExceptions
- UFHT.ViewDataController
- UFHT.ViewDataServiceHandler
- UFHT.Zippex
- UFHT.AggregatePieChartController
- UFHT.AggregatePieChartControllerTest
- UFHT.ConfigurationControllerTest
- UFHT.ConfigureControllerTest

- UFHT.DataDecryptionBatch
- UFHT.DataDecryptionBatchTest
- UFHT.DataEncryptionBatch
- UFHT.DataEncryptionBatchTest
- UFHT.DataProviderForViewDataTest
- UFHT.DateFilterWrapperTest
- UFHT.DeleteDataFromReportDataSourceTest
- UFHT.DeleteDataQueueBatchTest
- UFHT.DeploymentStatusTriggerWrapperTest
- UFHT.DisplayHistoryWrapperTest
- UFHT.DynamicTriggerGeneratorTest
- UFHT.DynamicTriggerGenericHandlerTest
- UFHT.ExportDataFromAttachBatchTest
- UFHT.FieldHistoryWrapperTest
- UFHT.FieldsWithPicklistWrapperTest
- UFHT.FilesFieldAuditWriterTest
- UFHT.FileWrapperTest
- UFHT.FilterConfigurationRunTest
- UFHT.FilterConfigurationTest
- UFHT.HistoryTrackingBatchTest
- UFHT.HistoryWrapperTest
- UFHT.LMSConfigManagerTest
- UFHT.LicenseCheckSchedulerTest
- UFHT.MetadataServiceTest
- UFHT.MultiselectControllerTest
- UFHT.PageMessageWrapperTest
- UFHT.PostInstallUtilTest
- UFHT.PostUninstallUtilTest
- UFHT.ProcessChildDataAsync
- UFHT.ProcessChildDataAsyncTest
- UFHT.RelatedListComponentExtensionTest
- UFHT.SpecialActionController
- UFHT.SpecialActionControllerTest
- UFHT.TestDataFactory
- UFHT.UFHTEmailMessageTest
- UFHT.UFHTRecordCountTest
- UFHT.UpdateDataQueueBatch

- UFHT.UpdateDataQueueBatchTest
- UFHT.UpdateDataQueueScheduler
- UFHT.UpdateDataQueueSchedulerTest

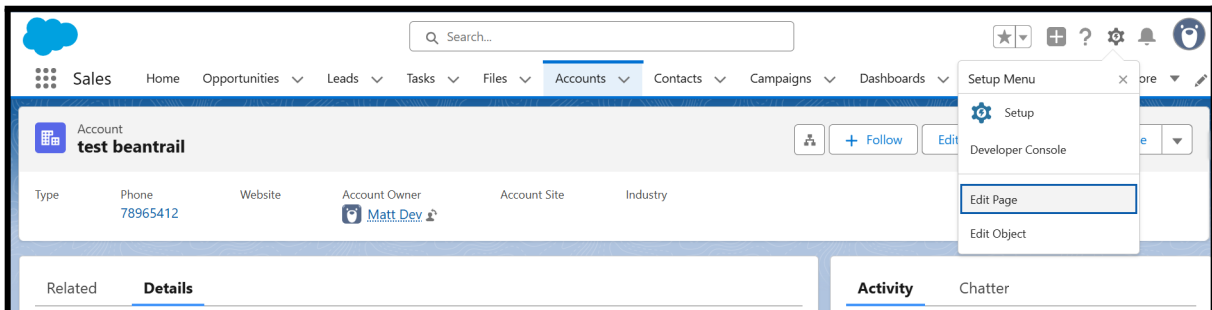
6. Grant Read, Create and Edit permission on the object for which field history needs to be tracked.
7. Set Field Level Security settings should be as Visible, for all fields required to be tracked.
8. Grant Read, Create and Edit permission for Ultra Track Container and Data Queue object on the user's profile.
9. Grant Edit Access to all the fields of Ultra Track Container and Data Queue in the Field Level Security.

5. Setup Contextual Field History

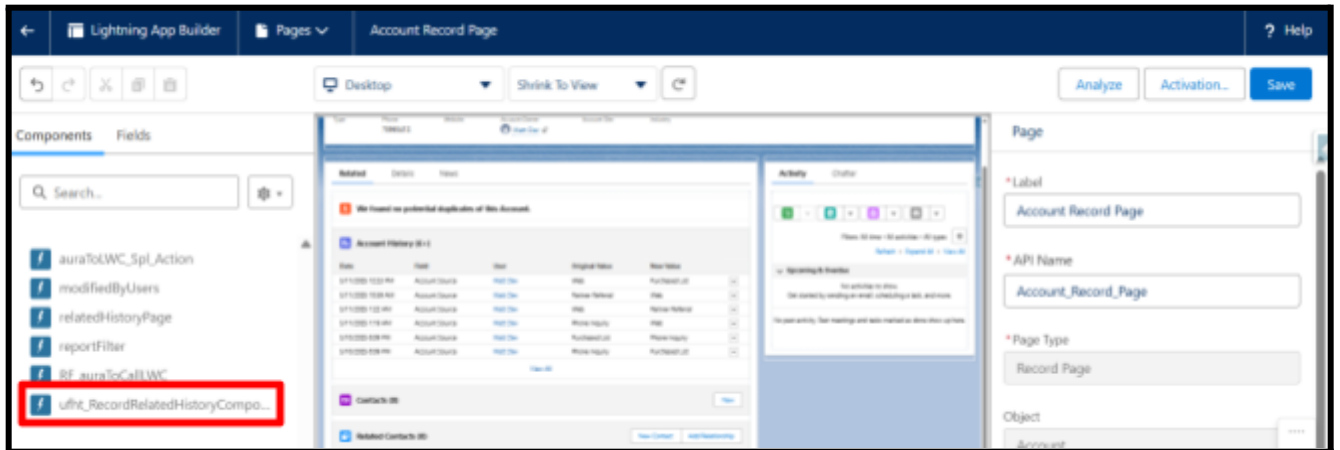
Adding the Record-Specific History Change Component to a Record Page

To display field-level changes for individual records, you can add the Record History Tracker Lightning Web Component directly to any record page layout:

1. Open the record page (e.g., Account, Opportunity) where you want to show history changes.
2. Click on the Setup gear icon and select the Edit page.



3. You will redirect to the Lightning App Builder page.
4. Drag and drop the ***ufht_RecordRelatedHistoryComponent*** from the Custom Components section onto the page.



5. Save and activate the page as needed.

Assign form factor

Select the form factors that you want your org default page to be available for.

☒ Desktop
☐ Phone
☐ Desktop and phone

Cancel Back **Next**

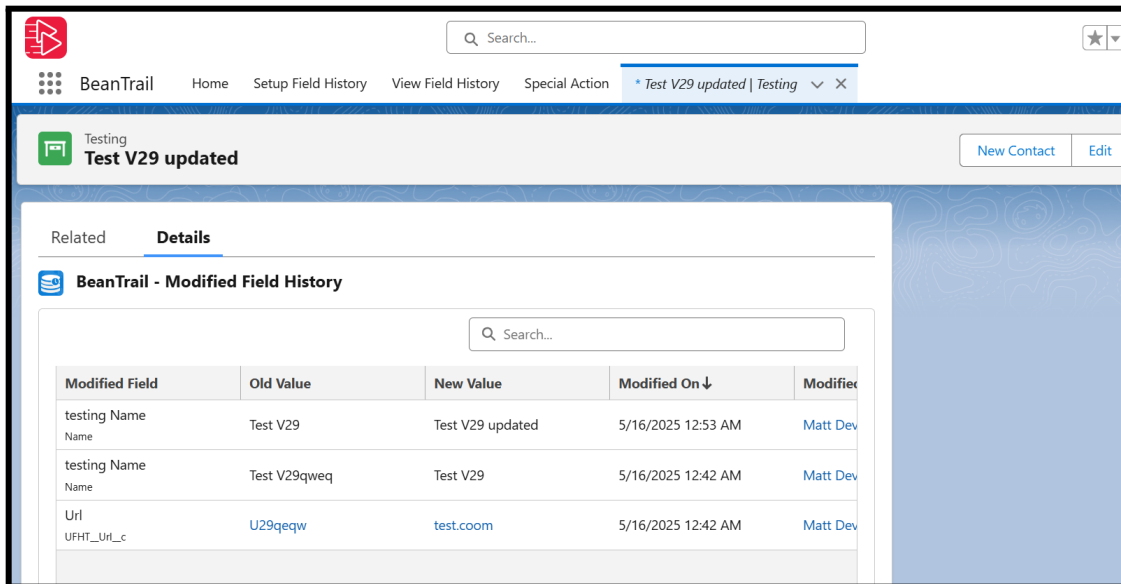
Review assignment

Review Assignments (1)

Form Factor	Current Org Default	New Org Default
Desktop	System Default	Account Record Page

Cancel Back **Save**

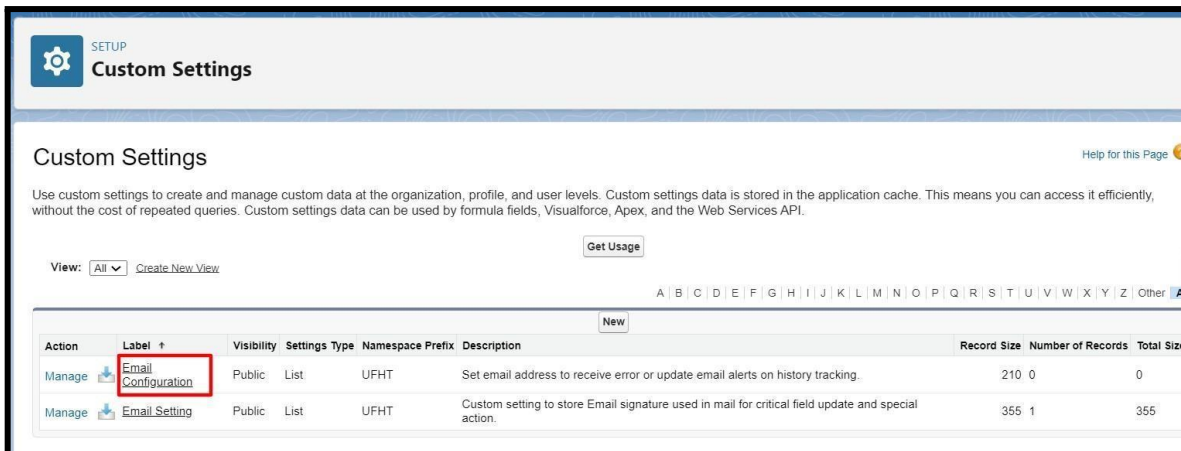
6. After saving you will see the component on your record detail page like below.



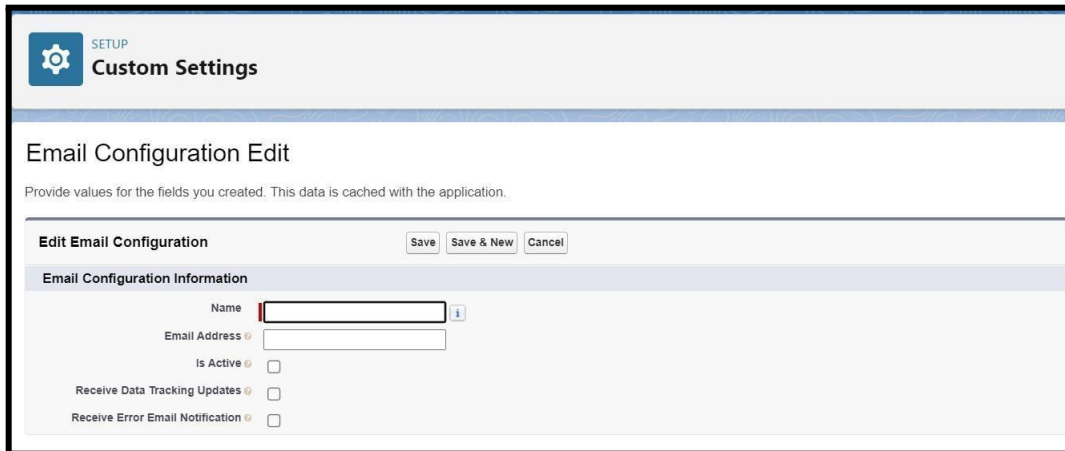
Note: Please repeat these steps for each object where you want to display record-specific change history.

6. Email Configuration Setup for email alerts on history tracking using custom settings.

1. 1.Set email address to receive error or update email alerts on history tracking.
2. 2.Go to Custom Setting → Click on “Email Configuration” Custom setting
→ Click on Manage → Click on New → Enter name and Email address.



3. Make sure the user entered a valid salesforce email address and the user should be active in salesforce org.



The screenshot shows the 'Custom Settings' page in the BeanTrail application. The page title is 'Email Configuration Edit'. Below the title, there is a note: 'Provide values for the fields you created. This data is cached with the application.' The main section is titled 'Edit Email Configuration' and contains three buttons: 'Save', 'Save & New', and 'Cancel'. Below this, there is a section titled 'Email Configuration Information' with the following fields and options:

- Name: A text input field with a red border and an information icon.
- Email Address: A text input field with a red border and an information icon.
- Is Active: A checkbox.
- Receive Data Tracking Updates: A checkbox.
- Receive Error Email Notification: A checkbox.

- 4.
5. If a user wants to receive email for Data tracking then he needs to check “Receive Data Tracking Updates” action and if user wants to receive email for error related email then they need to check “Receive Error Email Notification” action.
6. Users can select both at the same time and vice versa.

7. Setup Cross Object Formula Field History Tracking

To enable tracking of Cross Object Formula Field in your Salesforce organization, please contact beantrail@infobeans.com

Also, in order to track cross object formula fields of child objects, it is mandatory to set up parent objects for tracking.

8. License Expiry & Renewals

To use the BeanTrail App, one should have a trial or subscribed license purchased via paying the subscription cost. Please contact beantrail@infobeans.com for more details.

9. Glossary

Keyword	Description
<i>BeanTrail</i>	<i>Native Salesforce application to track field history changes</i>
<i>UFHT</i>	<i>Namespace of package.</i>
<i>AppExchange</i>	<i>The AppExchange is a sharing interface from Salesforce that allows you to browse and share apps and services for the Force.com platform.</i>
<i>Object</i>	<i>An object allows you to store information in your Salesforce organization. The object is the overall definition of the type of information you are storing. For each object, your organization will have multiple records that store the information about specific instances of that type of data.</i>
<i>Org</i>	<i>An org is an abbreviation of organization as it pertains to a deployment of Salesforce with a defined set of licensed users.</i>
<i>Package</i>	<i>A group of Force.com components and applications that are made available to other organizations through the App Exchange. You can use packages to bundle an app along with any related components so that you can upload them to AppExchange together.</i>
<i>Package Installation</i>	<i>Installation incorporates the contents of a package into your Salesforce organization. A package on the AppExchange can include an app, a component, or a combination of the two.</i>
<i>Record</i>	<i>A single instance of a Salesforce object.</i>
<i>Salesforce Security Model</i>	<i>Force.com platform security framework.</i>
<i>Updateable fields</i>	<i>Object fields on force.com that can be updated.</i>

