True Field History Guide

Welcome to True Field History!

This guide will walk you through the features and functionalities of our app, designed to help you efficiently track changes across various objects in Salesforce. But before diving into the app's capabilities, let’s explore why tracking field history is **useful**.

Why Your Business Needs True Field History:

Unlimited Field and Object Tracking
True Field History lets you track changes across Salesforce fields and objects in real-time, with no limits. Every update is captured, giving you complete visibility into your data and ensuring no critical information is missed.

Complete Visibility
Gain full transparency into who made changes, when they occurred, and what the previous values were. This ensures better data integrity and improved management.

Effortless Change Management
Easily search for specific updates with filters and restore previous values effortlessly using the rollback feature.

With True Field History, your Salesforce data is fully tracked and transparent, empowering you to manage changes efficiently and stay in control.

Let’s get started!

Installing

1. **Access the Installation Link:**

Go to the Salesforce AppExchange and search for **"True Field History"**, or simply click **here** to go directly to the app page.

2. **Initiate Installation:**

Once on the app page, click **"Get It Now"** to begin the installation process.

3. **Confirm Installation Details:**

Review the required permissions for the app to ensure they meet your organization’s policies.
After reviewing, click **"Confirm and Install"** to proceed.

4. **Choose Your Role:**

You will be prompted to choose your role or user type within your Salesforce organization. Select the role that best aligns with your responsibilities and access needs.

5. **Complete Installation:**

If not already logged in, enter your Salesforce credentials to complete the installation.
After installation, you will receive a confirmation email from Salesforce.

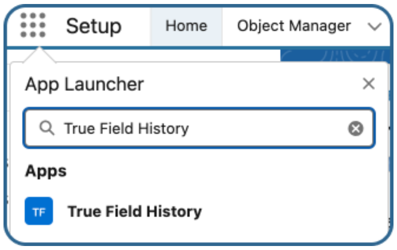
6. **Log in to Salesforce:**

Open your web browser and go to the Salesforce login page. Enter your username and password, then click **"Log In"**.

7. **Access the App**

Once logged in, go to the App Launcher from the Salesforce dashboard.

Type **"True Field History"** in the search bar, select the app from the results, and click on it to open.



Congratulations! You've successfully logged in to Salesforce and accessed the True Field History app. Now, to ensure the app functions properly and captures all the necessary data, let's move on to the **Setup** process. This will configure the app and allow you to start tracking changes efficiently.

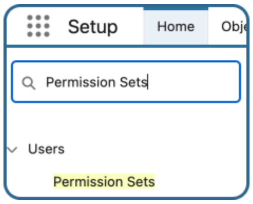
Setup

To ensure that True Field History functions correctly and tracks data as expected, we need to complete a few **essential configuration steps**. This setup process will allow the app to access the required fields and objects, establish permissions, and ensure that changes are tracked across your Salesforce environment in real-time.

Step 1. Permission Sets

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

1. **Managing Permission Sets**:
   • Navigate to the **Salesforce Setup** page.
   • In the **Quick Find** search field, type **Permission Sets** and click on it.



2. **Assigning Permission Sets**:
   • Select the **True Field History Admin** Permission Set (to assign users who require administrative privileges):

   • Click on **Manage Assignments**.

3. **Add Your User in Assignment**:
   • In the Manage Assignments window, click on the **Add Assignment** button.
   • Mark the checkbox next to the user you want to assign and click **Next**.

4. **Specify and Check Details**:
   • Choose an Expiration Date for the assignment or select No Expiration Date.
   • Press the **Assign** button to confirm.

5. **Confirm Permission**:
   • A confirmation notification will appear once the permission is successfully assigned.
   • Click **Done** to complete the process.

Step 2. Creating a Connected App

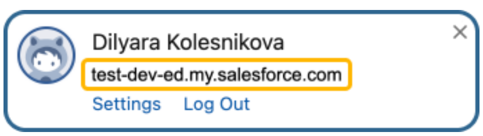
1. **Go to the App Manager**:
   • In Salesforce, go to the **Setup** page and type **App Manager** in the

Quick Find box.

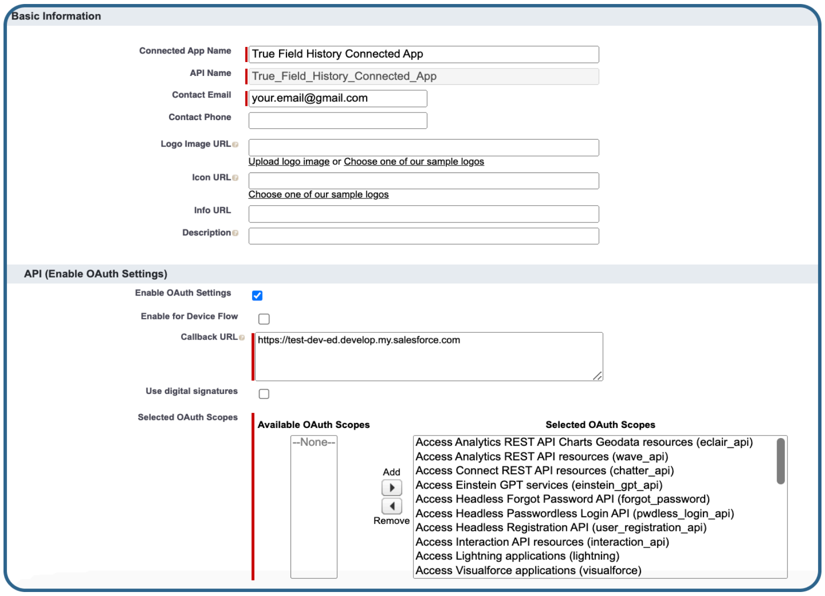
2. **Create a New Connected App**:
• Click the **New Connected App** button in the top-right corner.

3. **Choose Create a Connected App**:
• Select the option **Create a Connected App** and then click **Continue**.

4. **Fill in the Required Fields**:
• **Connected App Name**: Enter a user-friendly name for your app (e.g., **True Field History Connected App**).
• **API Name**: This field will be automatically filled based on the app name.
• **Contact Email**: Enter your contact email address.
• **Enable OAuth Settings**: Check the box.
• **Callback URL**: Enter the **base URL** of your Salesforce org (This is a temporary field and will be updated after creating the Auth Provider).
For example, you can find your Salesforce Org's Base URL by clicking your **profile icon** in the top-right corner of Salesforce.



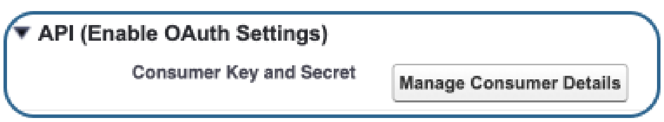
• **Selected OAuth Scopes**: Select **all the available scopes** for OAuth.



5. **Click Save.**
   • Changes can take up to 10 minutes to take effect.

6. **Click Continue.**

7. **Save Consumer Key and Consumer Secret**:
   • Once you've saved the Connected App, click the **Manage Consumer Details** button in the opened window.



   • You will receive a **verification code** via email. Enter it in the window that appears.

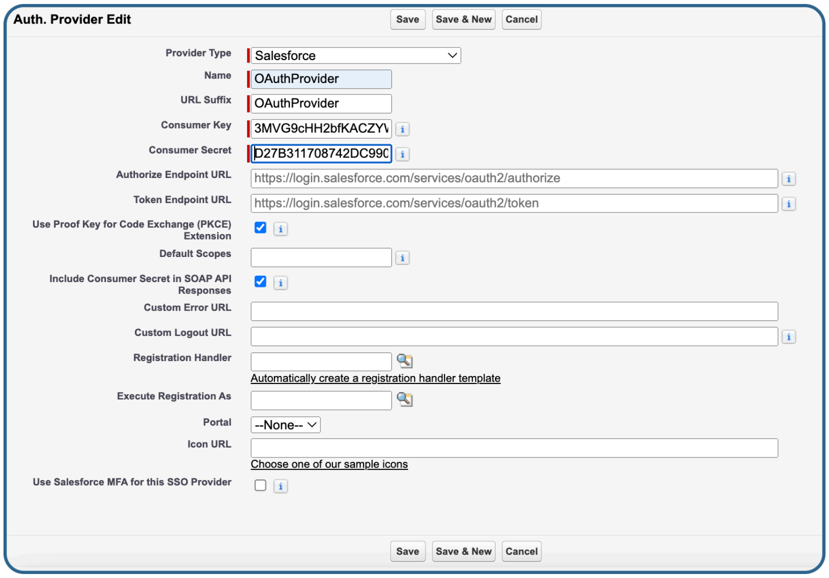
> **Important**: Copy the **Consumer Key** and **Consumer Secret**, and store it somewhere (for example, in your notes), as you will need them later in the setup process.

Step 3. Creating the Auth. Provider

1. **Go to the Auth. Providers Page**:
   • In Salesforce, go to the **Setup** page and type **Auth. Providers** in the Quick Find box.
   • Select **Auth. Providers** from the search results.

2. **Create a New Auth. Provider**:
   • Click the **New** button.

3. **Fill in the Auth. Provider Settings**:
   • **Provider Type**: From the drop-down menu, select **Salesforce**.
   • **Name**: Enter a user-friendly name for your Auth. Provider (e.g., **OAuthProvider**).
   • **URL Suffix**: This field will be auto-filled, but you can change it if needed.
   • **Consumer Key**: Paste the **Consumer Key** you copied from the **Connected App** in the previous step.
   • **Consumer Secret**: Paste the **Consumer Secret** you copied from the **Connected App** in the previous step.



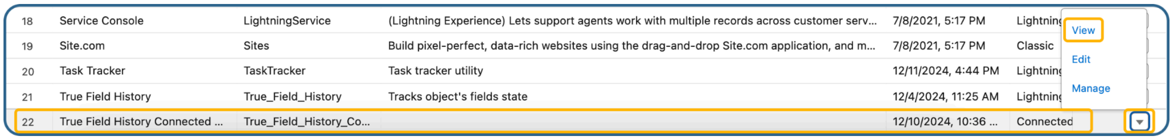
4. **Salesforce Configuration**:
   • Scroll down to the **Salesforce Configuration** section.

> **Important**: Copy the **Callback URL** provided in this section and store them somewhere (for example, in your notes). You will need this URL in the next steps when editing the Connected App.

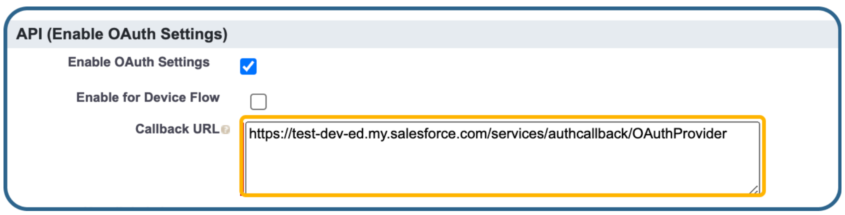
Step 4. Update the Connected App with the Callback URL

1. **Go to App Manager**:
   • In Salesforce, go to the **Setup** page and type **App Manager** in the Quick Find box.

2. **Find Your Connected App**:
   • Find the Connected App you created (in our example, it's called **True Field History Connected App**, but it will be the name you chose in the step 2) and click the down arrow on the right side.
   • Select **View**.



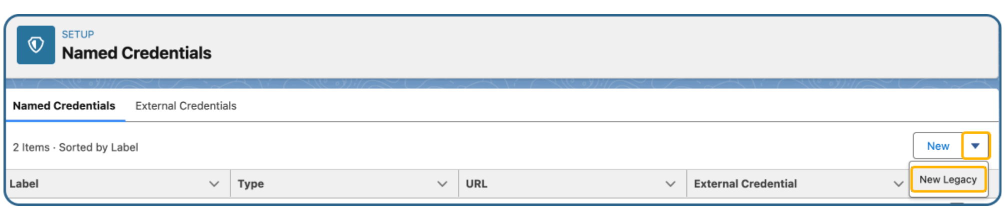
3. **Edit the Connected App**:
   • Click the **Edit** button.
   • In the **Callback URL** field, paste the **Callback URL** you copied from the Auth. Provider.
   • Click **Save**.



Step 5. Creating a Named Credential

1. **Go to Named Credentials**:
   • In Salesforce **Setup**, type **Named Credentials** in the Quick Find box and select it.

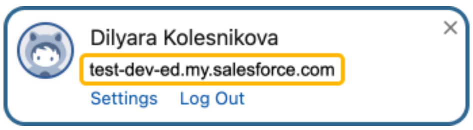
2. **Create New Legacy Named Credential**:
   • Click the arrow next to **New** and then click the **New Legacy** button.



3. **Configure the Named Credential**:
   • **Label**: Enter a user-friendly label for the Named Credential (e.g., **True Field History Tooling API**).
   • **Name**: Enter **TrueFieldHistoryToolingApi**

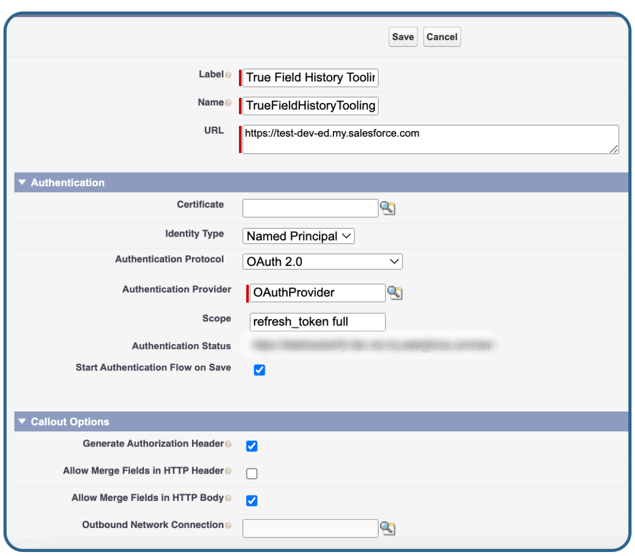
> **Important**: You must use this exact name. Do not change or modify it, as it is required for the app to function correctly.

   • **URL**: Enter the **Base URL** of your Salesforce instance (it should look like https://yourInstance.my.salesforce.com).
   You can find the instance URL by logging into Salesforce and checking the URL bar, or by clicking your profile icon in the top-right corner.



   • **Identity Type**: Select **Named Principal**.
   • **Authentication Protocol**: Choose **OAuth 2.0**.
   • **Authentication Provider**: Select the **Auth. Provider** you created earlier (e.g., **OAuthProvider**).
   • **Scope**: Enter "**refresh_token full"**.
   • **Select the following checkboxes:**

   - Generate Authorization Header
   - Allow Merge Fields in HTTP Body



4. **Save the Named Credential**:
   • Click **Save**. Once saved, you will be redirected to the login page.
   • Log in using your Salesforce user credentials and grant access to the Connected App.

5. **Authorization**:
   • After logging in and granting access, the **Named Credential** will be fully set up.

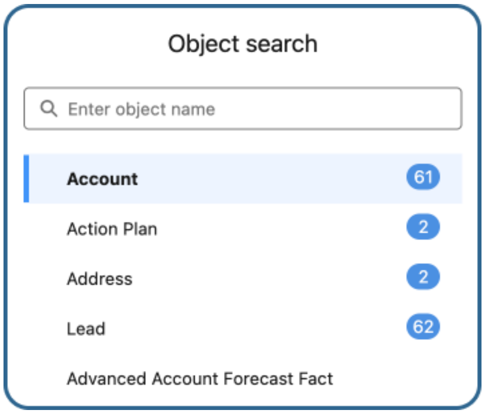
You have now successfully configured the **True Field History** app, ensuring full functionality for tracking field and object changes in Salesforce!

True Field History Configuration

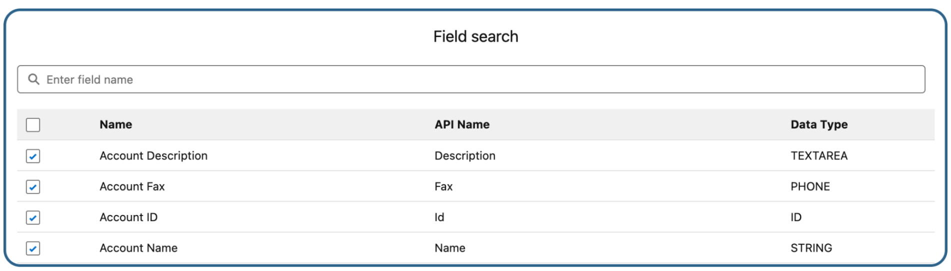
Before you can start tracking changes to fields in Salesforce, you need to configure the required objects and fields. Follow these steps:

1. **Access the True Field History Configuration:**
   • Click the **App Launcher** icon located in the top-left corner of the screen.
   • In the search bar, type **True Field History** and select it.
   • The **True Field History Configuration** window will open, displaying options to configure objects and fields for history tracking.

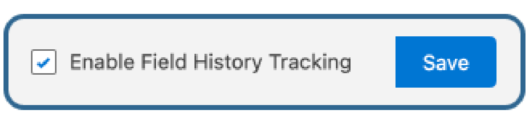
2. **Select the Object to Track:**
   • Use the **Object Search Bar** (top-left) to find the object you want to track (e.g., Account, Lead, Event, etc.).
   • Click the object name to view its fields.



3. **Select Fields to Track:**
   • Use the Field Search Bar to choose specific fields.
   • Check the box next to each field name to enable tracking for that field.
   • To select all fields, check the box located next to the "Name" column header at the top of the list.

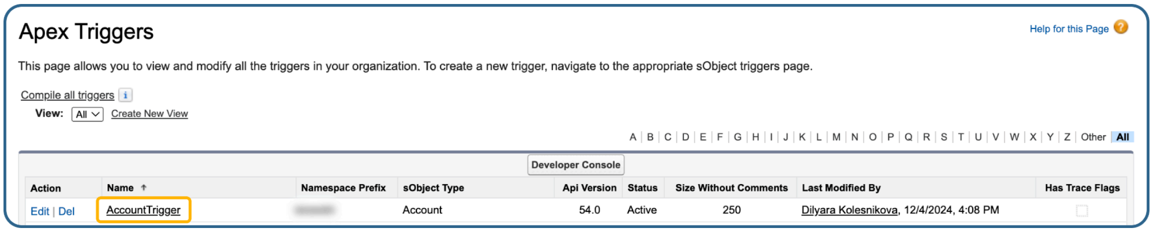


4. **Enable Field History Tracking:**
   • On the top-right of the window, check the **Enable Field History Tracking** box.
   • Click Save to apply your changes.



5. **Confirm that everything is set up correctly:**
   • Navigate to **Setup** → **Apex Trigger**.
   • In the **Name** column, find the object you selected for tracking, followed by the word **Trigger**.

For example, if you selected **Account** for tracking, look for **AccountTrigger**.
• If the trigger is present, your setup has been successfully configured.

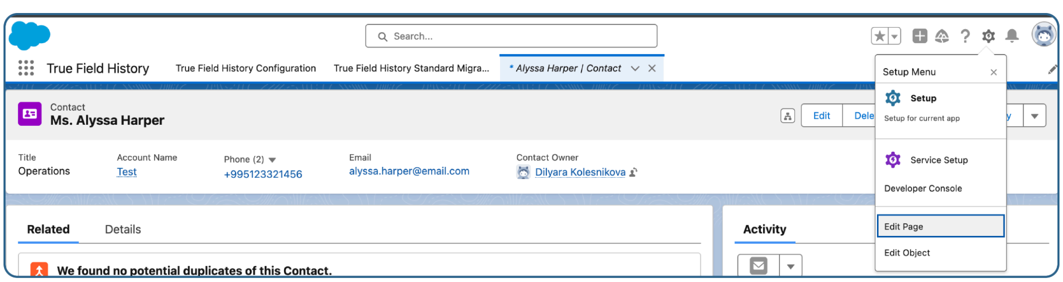


Viewing Field History Changes

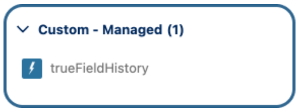
Adding the True Field History Component

Now, we need to add the **True Field History** component to the pages of the objects that we want to track changes for. To do this, follow the steps below:

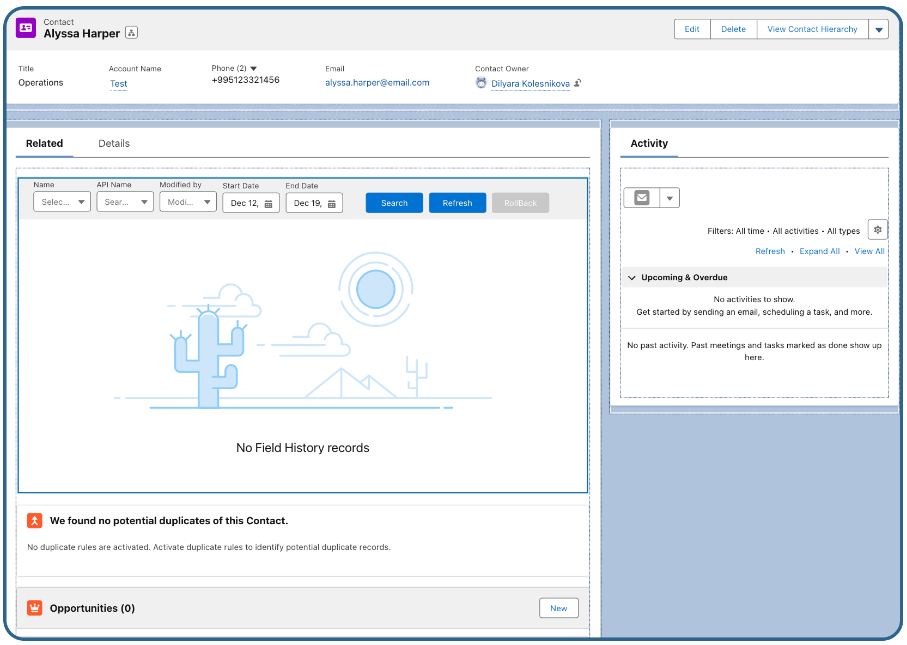
1. **Navigate to the Object Page and Open the Edit Layout:**
   • Go to the page of any object you want to track changes for (e.g., a contact page).
   • Click on the **gear icon** at the top right of the page and select **"Edit Page"** from the dropdown menu. This will open the page layout editor.



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



• Drag and drop the **TrueFieldHistory** component to the desired location on the page layout where you want to display the field history. **For example**:



3. **Activate and Set as Org Default:**
   • After positioning the **TrueFieldHistory** window, click **Activation** at the top right of the page layout editor.
   • Click the **Assign as Org Default** button.
   • Select **Desktop and Phone**, then click **Next**.
   • In the resulting window, click **Save**.

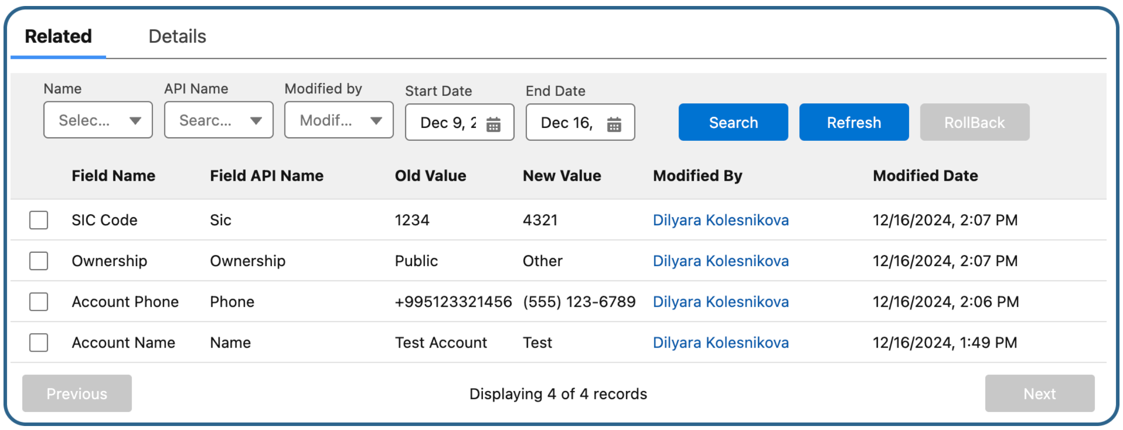
4. **Save the Changes:**
   • In the upper right corner, click **Save** to apply the changes.

Now, the **TrueFieldHistory** component will appear on the page of each **Contact** (or whichever object you applied it to).

> **Important**: These actions need to be repeated for each object whose changes you want to track.

Main Application Window Overview

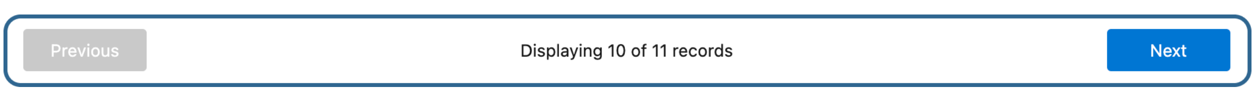
This is the **main application window** where you can view a detailed history of all changes.



Key Data Columns:

- **Field Name**: Name of the field that was changed.
- **Field API Name**: Technical API name of the field.
- **Old Value**: The value of the field before the change.
- **New Value**: The updated value after the change.
- **Modified By**: The user who made the change.
- **Modified Date**: Date and time of the change.

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



By default, the application records data for **the last 7 days**. If you want to view changes outside this default period, you can use the **Start Date** and **End Date** filters to select any timeframe you need.

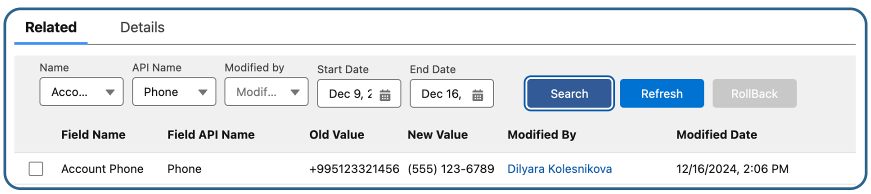
Filters

If you want to find specific changes, use the **filters** at the top of the page:

1. Use the filters at the top of the page:

    - **Name**: Filter by field name.
    - **API Name**: Search using the API name.
    - **Modified By**: Filter by the user who made the change.
    - **Start Date / End Date**: Specify a date range for changes.

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



Refresh

To view the most recent changes, you need to click the **Refresh** button or reload the page. This ensures that any updates made to the object fields are properly displayed in the application.

Rollback

The **RollBack** function allows you to revert a field to the value recorded in a specific change history record. This means you can restore a field to any previous state captured in the history, depending on the record you select.

1. Find the history record with the value you want to restore.

2. Click the **RollBack** button.

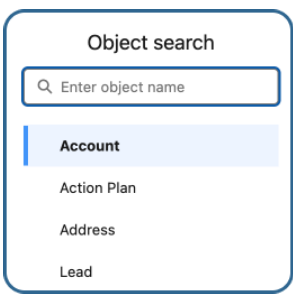
True Field History Standard Migration

If you have been using Salesforce's Standard Field History Tracker, you can now easily migrate that data into the **True Field History** application without losing any information.

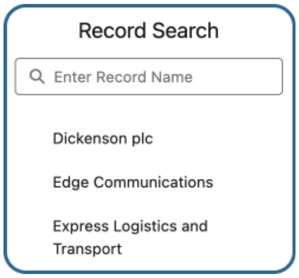
Steps for Migration:

1. **Open the True Field History Standard Migration Window**

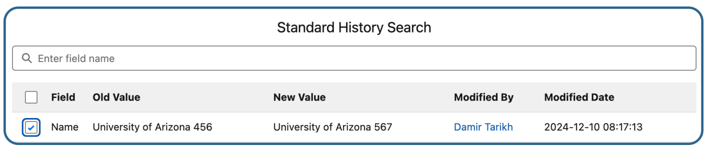
2. **Select the Object**
   Use the **Object Search** bar to find the object (e.g., **Account**) you want to migrate data for.



3. **Select the Record**
   Use the **Record Search** bar to locate the specific record you want to migrate.



4. **View Standard History**
   The **Standard History Search** panel will display changes tracked by the standard field history feature.



5. **Select Records to Migrate**
   Check the boxes next to the field history records you wish to migrate.

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

To reset filters and return to the default view, click the **Refresh** button.

You're Ready to Track Changes Effectively!

Now that you've learned the full functionality of **True Field History**, you're all set to track changes efficiently and keep your data under control.

Additional Features or Customization

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

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

Contact Us

Need Help or Have Questions?
If you have questions about **True Field History** or need assistance, don't hesitate to reach out! Our dedicated support team is here to help you every step of the way. Whether you need guidance on using a feature, encounter a technical issue, or want to share your feedback, we're just an email away.

Contact us anytime at **help@truesolv.com**, and we'll respond as soon as possible.

Your satisfaction is our top priority, and we're committed to ensuring you have a smooth and productive experience with True Field History.

Thank you for choosing True Field History!

Warm regards,
TrueSolv Team