



# 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

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-  **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. Add remote site settings
3. Enable tracking for standard & Custom objects
4. Configuring tracking in Salesforce Classic
5. Configuring tracking in Salesforce Lightning
6. Remove Tracking



# THE SETUP

Part 1 :

## Install the Managed Package In Your Org



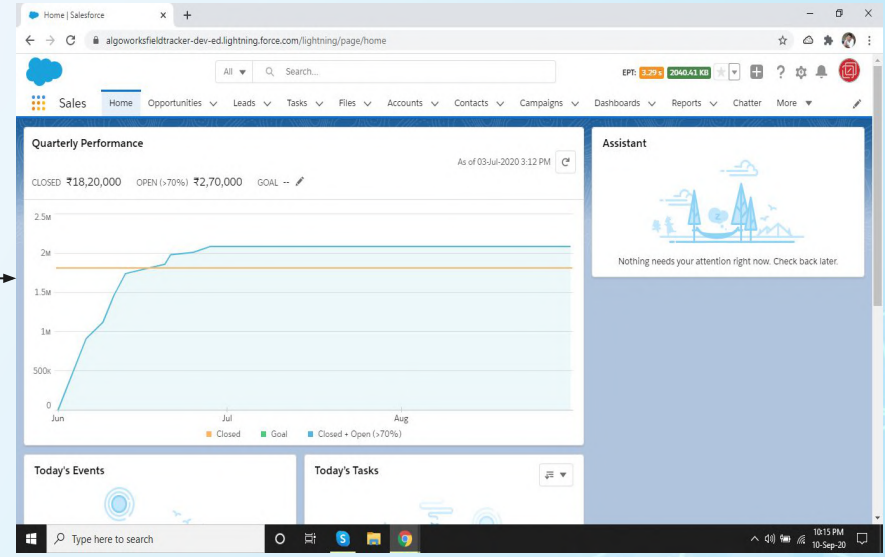


# LOGIN INTO THE ENVIRONMENT - FRONTEND

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 login form features the Salesforce logo at the top. Below it, there are two input fields: 'Username' with a '1 Saved Username' link and 'Password'. A blue 'Log In' button is positioned below the password field. There is a 'Remember me' checkbox and a 'Forgot Your Password?' link at the bottom of the form. The footer contains the text '© 2020 salesforce.com, inc. All rights reserved.'



# PART 1 - INSTALL MANAGED PACKAGE IN YOUR ORG

salesforce


## 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





# PART 1 - 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**

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**PART 1**  
Install the Managed Package In Your Org

Search Setup

Home Object Manager

## Installed Packages

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

Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects	AppExchange Release Status
Uninstall	Field Tracker	Algoworks Solutions Inc	1.0	FieldTracker	9/25/2020 1:41 AM	✓	1	5	4	Not Passed

**Uninstalled Packages**

No uninstalled package data archives

**PART 1**  
Install the Managed Package In Your Org





# PART 1 - INSTALL MANAGED PACKAGE IN YOUR ORG

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

## Package Details Field Tracker (Managed)

### Installed Package Detail

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	✓	Apps	1
		Objects	4

Tracking of Custom  
and standard objects

PART 1

Install the Managed Package In Your



Part 2 :

# Add Remote Site Settings





# PART 2 - 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 your Salesforce org. For each Web address, click New Remote Site.

**New Remote Site**

Click on *New Remote Site*.

Action	Remote Site Name	Namespace Prefix	Remote Site URL	Active	Created By	Created Date	Last Modified By	Last Modified Date
Edit   Del	AcceDefault	-	http://www.algowork.com	✓	Admin Algoworks	9/25/2020 12:23 AM	Admin Algoworks	9/25/2020 12:23

**PART 2**  
Add Remote Site Settings





# PART 2 - 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-fieldtracker.visualforce.com

Disable Protocol Security:

Description:

Active:

Save Save & New Cancel

Algoworks

PART 2 Add Remote Site Settings

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

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

Remote Site Name: FieldTracker

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

Disable Protocol Security:

Description: Active

Created By: Algoworks Admin 9/25/2020 3:23 AM

Edit Delete Clone

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PART 2 Add Remote Site Settings



Part 3 :

# Enable Tracking For Standard & Custom Objects



A high-angle, close-up photograph of a person's hands typing on a silver laptop keyboard. The laptop is open on a white desk. The person is wearing a light-colored, vertically striped button-down shirt. The background is a clean, white surface with a small white card or notepad partially visible at the top. The overall aesthetic is professional and minimalist.

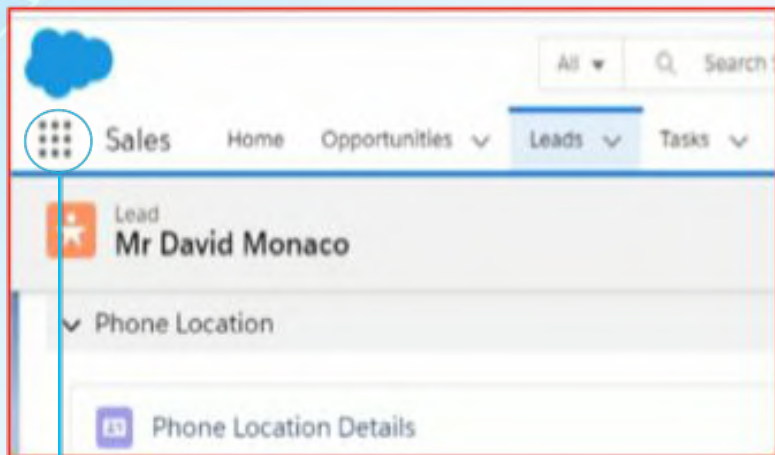
Part 3.1

# **Standard Object : Account** *(With Custom Fields)*



## PART 3.1 - 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.

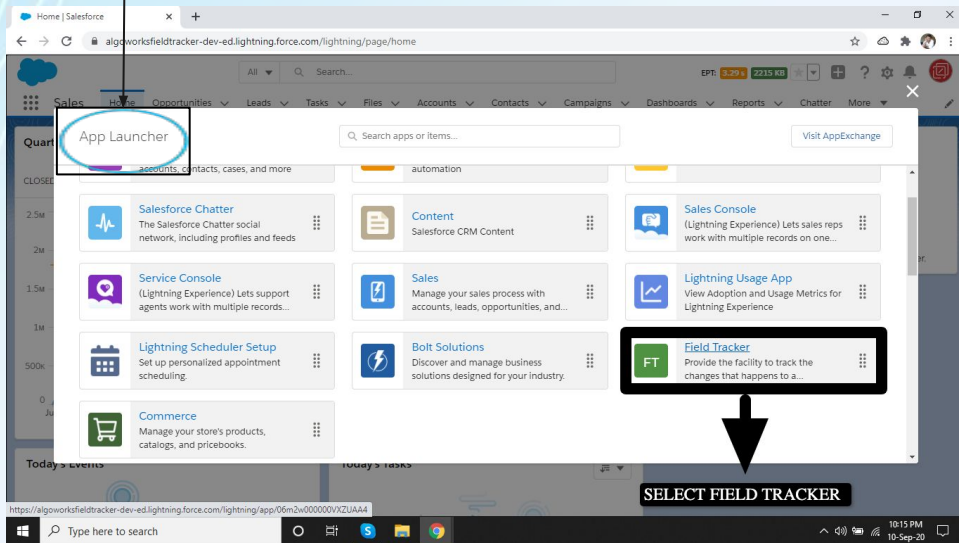




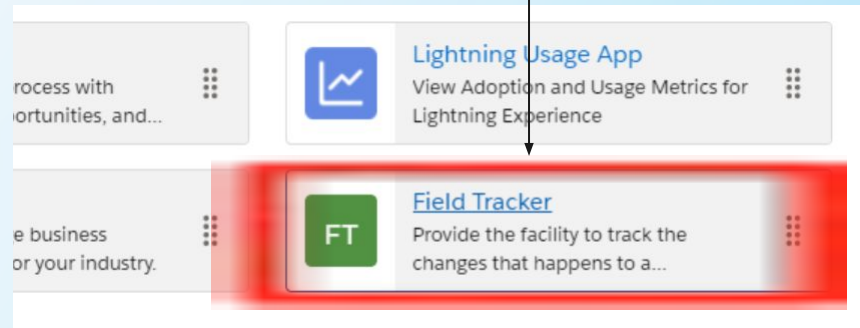
# PART 3.1 - ENABLE TRACKING FOR STANDARD OBJECTS WITH CUSTOM FIELDS



In App Launcher find Field Tracker



Select Field Tracker







# FIELD TRACKER HOME PAGE



Home | Salesforce

algoworksfiedtracker-dev-ed.lightning.force.com/lightning/page/home

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

Quarterly Performance

CLOSED ₹18,20,000 OPEN (>70%) ₹2,70,000 GOAL

As of 03-Jul-2020 3:12 PM

2.5M  
2M  
1.5M  
1M  
500K  
0

Jun Jul Aug

Closed Goal Closed + Open (>70%)

Today's Events Today's Tasks

Assistant

Nothing needs your attention right now. Check back later.

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

CONFIGURATION PAGE | Sales

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

Standard Object Relationship 0/40 Custom Object Relationship 0/40

Add New Object + All S C

S.NO	OBJECT NAME	STATUS	SELECTED FIELDS	ACTION
------	-------------	--------	-----------------	--------

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.

The screenshot shows the Salesforce Field Tracker Configuration Setup page. The 'Add New Object +' button is circled in blue. A 'Tracking Object' dialog box is open, featuring a search bar for 'Enter Object Name', a 'Select All' checkbox, an 'Active' checkbox, and two columns for 'Select Fields' and 'Selected'. The dialog has 'Cancel' and 'SAVE' buttons at the bottom.





# 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.

Add the required tracking object

The screenshot shows the 'Field Tracking Configuration Page' in a web browser. A modal window titled 'Tracking Object' is open. The 'Enter Object Name:' field contains 'Account'. Below this, there are radio buttons for 'Select All' (unchecked) and 'Active' (checked). A list of fields is shown on the left, with 'Account Description' and 'Account Name' moved to a 'Selected' list on the right. At the bottom of the modal are 'Cancel' and 'SAVE' buttons.

The screenshot shows the same 'Field Tracking Configuration Page'. The 'Tracking Object' modal is open, but the search field is active with the letter 'a' entered. A dropdown list of object names is visible, including 'Account', 'Attachment', 'Asset', 'Apex Test Queue Item', 'Account Contact Role', 'Assigned Resource', and 'Asset File'. The 'Active' radio button is selected. 'Cancel' and 'SAVE' buttons are at the bottom.





# 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 page. A modal window titled "Tracking Object" is open, showing the configuration for the "Account" object. The "Active" checkbox is selected. The "Selected" list contains "Account Name", "Account Number", "Account Type", "Active", "Annual Revenue", and "Owner ID". The "SAVE" button is highlighted.

Select Fields	Selected
Account Description	Account Name
Account Fax	Account Number
Account Phone	Account Type
Account Rating	Active
Account Site	Annual Revenue
Account Source	Owner ID





# POST - SETUP : STANDARD OBJECT

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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 +

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 Salesforce Field Tracker interface with the 'Recently Viewed' tab selected. The navigation menu includes 'Field Tracker', 'Home', 'Configuration Setup', 'Tracking Configuration', 'Standard Objects Summary', 'Custom Objects Summary', and 'Exception'. The main content area displays a list of 5 items under the 'Recently Viewed' tab. The first item, 'Contact', is circled in blue, and an arrow points from the text box above to it. The table below shows the following data:

Object Name	Active	All Field Enabled	Field Set Name	Lookup Name
1 Contact	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	FieldTracker_Account	FieldTracker_Account__c
2 Opportunity	<input checked="" type="checkbox"/>	<input type="checkbox"/>	All Fields are Enabled	FieldTracker_Contact__c
3 Account	<input checked="" type="checkbox"/>	<input type="checkbox"/>	FieldTracker_Test_Object_1	FieldTracker_Custom_Test_Object_1__c
4 Custom_Test_Object_2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	All Fields are Enabled	FieldTracker_Custom_Test_Object_2__c
5 Custom_Test_Object_1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	FieldTracker_Opportunity	FieldTracker_Opportunity__c

The screenshot shows the Salesforce Field Tracker interface with the 'Tracking Configuration' tab selected. The navigation menu is the same as in the previous screenshot. The main content area displays a list of 5 items under the 'Tracking Configuration' tab, sorted by Object Name. The table below shows the following data:

Object Name	Active	All Field Enabled	Field Set Name	Lookup Name
1 Account	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	FieldTracker_Account	FieldTracker_Account__c
2 Contact	<input checked="" type="checkbox"/>	<input type="checkbox"/>	All Fields are Enabled	FieldTracker_Contact__c
3 Custom_Test_Object_1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	FieldTracker_Test_Object_1	FieldTracker_Custom_Test_Object_1__c
4 Custom_Test_Object_2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	All Fields are Enabled	FieldTracker_Custom_Test_Object_2__c
5 Opportunity	<input type="checkbox"/>	<input checked="" type="checkbox"/>	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).

The screenshot shows the Salesforce Field Tracker interface. The 'Tracking Configuration' for the 'Account' object is displayed. The 'Details' section is expanded, showing the following information:

- Object Name: Account
- Object Prefix: 001
- Field Set Name: FieldTracker\_Account
- Lookup Name: FieldTracker\_Account
- Owner: Algoworks Admin
- Created By: Algoworks Admin, 10/09/2020, 10:19 pm
- Last Modified By: Algoworks Admin, 10/09/2020, 10:21 pm

The 'Activity' section on the right shows options for 'New Event', 'New Task', 'Log a Call', and 'Email'. The 'Upcoming & Overdue' section indicates 'No next steps' and 'No past activity'.







Part 3.2

## **Custom Object : Custom\_Object\_c**

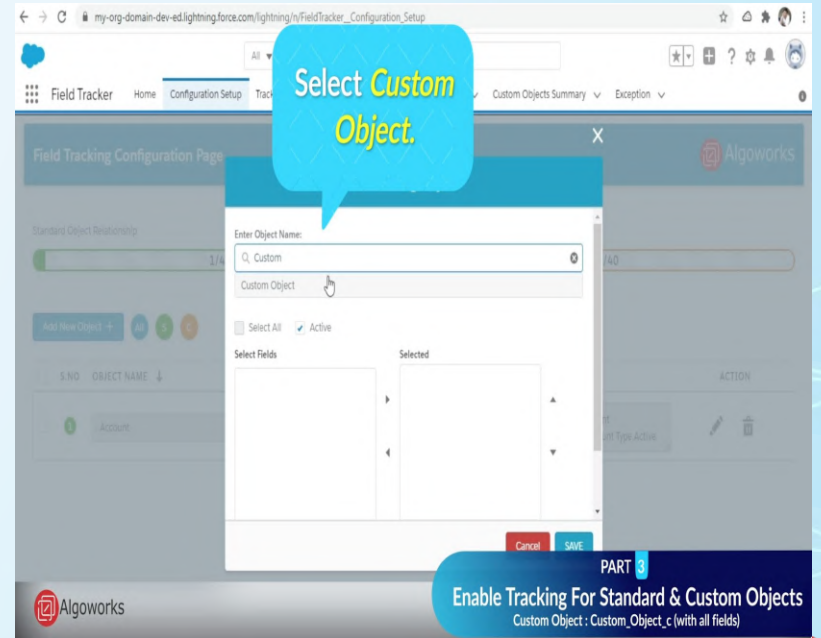
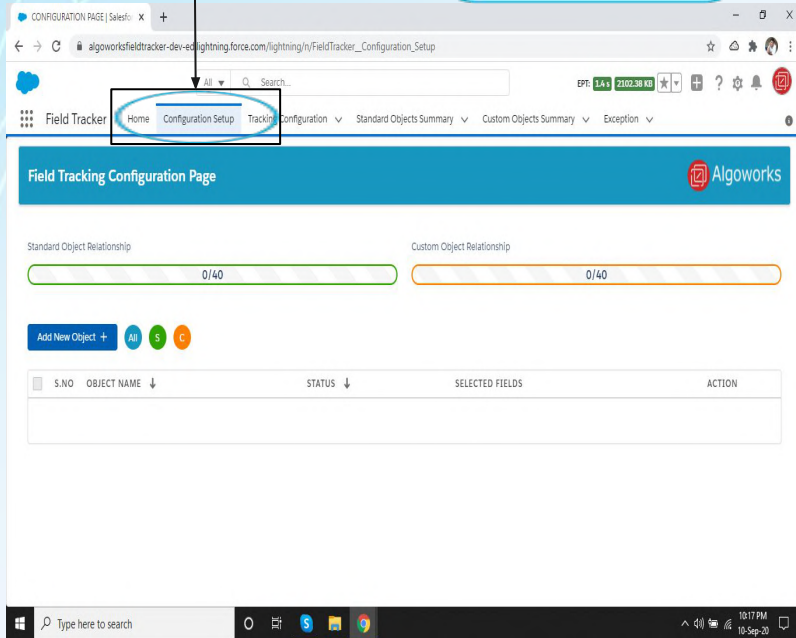
*(With All Fields)*



# PART 3.2 - ENABLE TRACKING FOR CUSTOM OBJECT WITH ALL FIELDS



FIELD TRACKER –  
CONFIGURATION SETUP.  
Click on configuration Tab.



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





# PART 3.2 - ENABLE TRACKING FOR CUSTOM OBJECT WITH ALL FIELDS

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

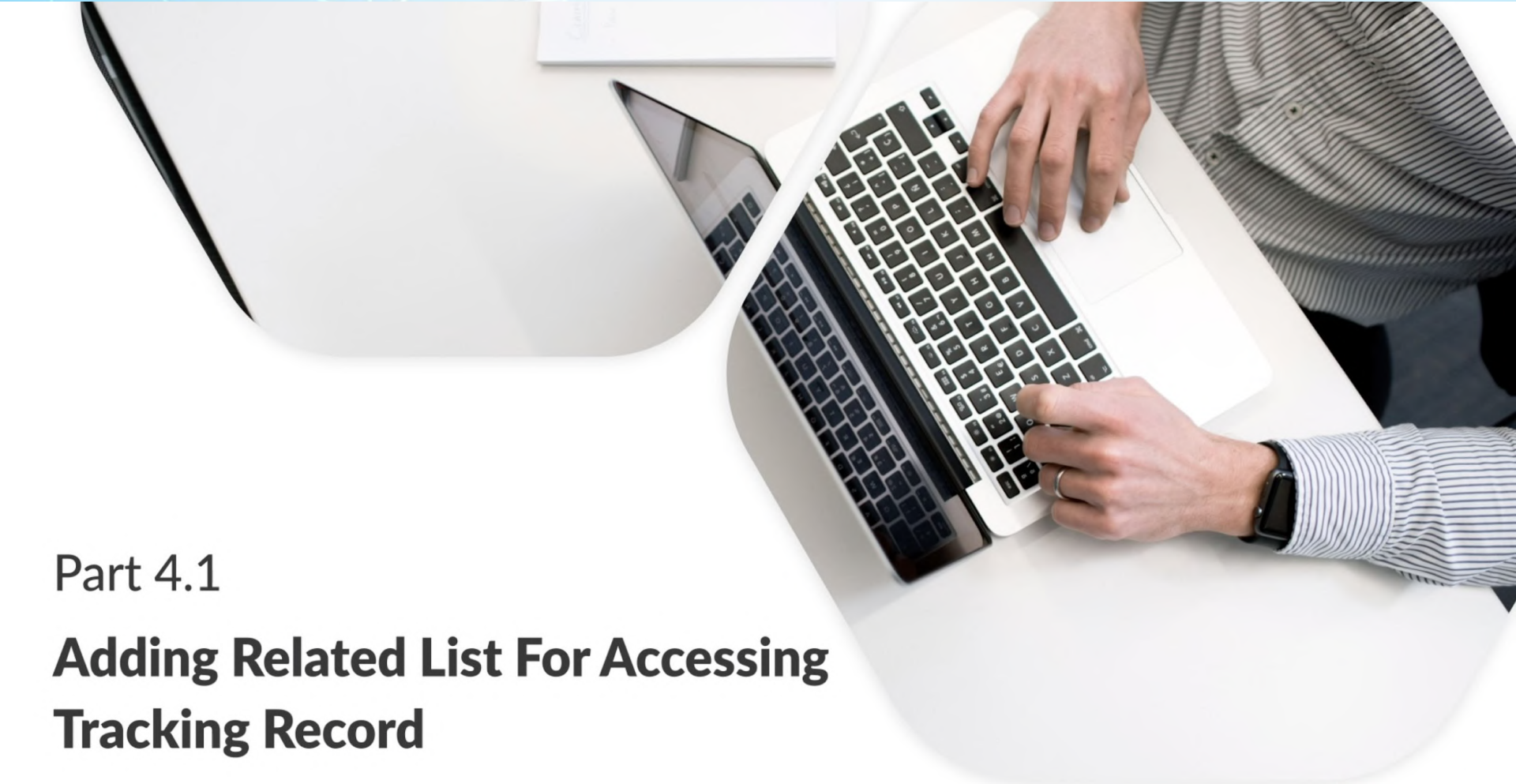
Now click on **Save**.

**PART 3**  
Enable Tracking For Standard & Custom Objects  
Custom Object : Custom\_Object\_c (with all fields)



Part 4 :

# Configuring Tracking In Salesforce Classic



Part 4.1

## **Adding Related List For Accessing Tracking Record**



# PART 4.1 - ADDING RELATED LISTS FOR ACCESSING TRACKING RECORD



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

**PART 4**  
Configuring Tracking In Salesforce Classic  
Adding Related List For Accessing Tracking Record

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

**PART 4**  
Configuring Tracking In Salesforce Classic  
Adding Related List For Accessing Tracking Record

Algoworks





# PART 4.1 - ADDING RELATED LISTS FOR ACCESSING TRACKING RECORD



Account Page Layout

Action	Created By	Modified By	Feed Based Layout
Edit   Del	ajp@algoworks Admin	ajp@algoworks Admin	<input type="checkbox"/>
Edit   Del	ajp@algoworks Admin	ajp@algoworks Admin	<input type="checkbox"/>
Edit   Del	ajp@algoworks Admin	ajp@algoworks Admin	<input type="checkbox"/>
Edit   Del	ajp@algoworks Admin	ajp@algoworks Admin	<input type="checkbox"/>

**Click on Edit**

**PART 4**  
Configuring Tracking In Salesforce Classic  
Adding Related List For Accessing Tracking Record

Go to Related Lists

Account Sample

Highlights Panel

Quick Actions in the Salesforce Classic Publisher

**PART 4**  
Configuring Tracking In Salesforce Classic  
Adding Related List For Accessing Tracking Record





# PART 4.1 - ADDING RELATED LISTS FOR ACCESSING TRACKING RECORD



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

**Related Lists**

**FieldTracker** New | Change Owner

Record ID
Sample Text

**Contacts** New | Merge Contacts | Add to Campaign

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

**Opportunities** New

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

**Cases** New | Change Owner

Case	Contact Name	Subject
------	--------------	---------

**Algoworks** **PART 4** **Configuring Tracking In Salesforce Classic**  
Adding Related List For Accessing Tracking Record

Go to **Properties**.

**Related Lists**

**FieldTracker** New | Change Owner

[Related List Properties](#)

Record ID
Sample Text

**Contacts** New | Merge Contacts | Add to Campaign

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

**Opportunities** New

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

**Cases** New | Change Owner

Case	Contact Name	Subject
------	--------------	---------

**Algoworks** **PART 4** **Configuring Tracking In Salesforce Classic**  
Adding Related List For Accessing Tracking Record







# PART 4.1 - ADDING RELATED LISTS FOR ACCESSING TRACKING RECORD



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

**PART 4**  
Configuring Tracking In Salesforce Classic  
Adding Related List For Accessing Tracking Record

Select Record ID given under Sort By.

**PART 4**  
Configuring Tracking In Salesforce Classic  
Adding Related List For Accessing Tracking Record





# PART 4.1 - ADDING RELATED LISTS FOR ACCESSING TRACKING RECORD



Accounts Home - Salesforce - Edit Page Layout: Account Layout

my-org-domain-dev-ed.my.salesforce.com/layouteditor/layoutEditor.apexp?type=Account&lid=00h2w0000807XS&retURL=%2Fui%2Fsetup%2FLayout%2FPageLayout...

Save Quick Save Preview As... Cancel Undo % Undo % Help % Layout Properties

Quick Find Related List Name

Activity History Cases Contact Point Emails Contact Deliveries Files Opportunities Resource Preferences

Approval History Communication Sub. Contact Point Phones Contracts Groups Orders Service Appointments

Related Lists Properties - FieldTracker

Columns

Select fields to display on the related list. You can also re-order the selected fields.

Available Fields	Selected Fields
Created By Alias	Record ID
Created Date	Created By
JSON	Action
Last Activity Date	
Last Modified By	
Last Modified By Alias	
Last Modified Date	
Object Name	

Sort By: Record

Ascending  Descending

Buttons

OK Cancel Revert to Defaults

Click on Descending.

**PART 4**  
Configuring Tracking In Salesforce Classic  
Adding Related List For Accessing Tracking Record

Triggers Partner Roles Contact Roles on Accounts Page Layouts Field Sets Compact Layouts Search Layouts Buttons, Links, and Actions Record Types Limits Account Teams Account Team Member Layout Account Settings D&B Companies Contacts Notes Opportunities Path Quotes Forecasts Social Media Cases Entitlement Management Self-Service Call Center Console Omni-Channel Chat

Save Quick Save Preview As... Cancel Undo % Undo % Help % Layout Properties

Quick Find Related List Name

Activity History Cases Contact Point Emails Contact Deliveries Files Opportunities Resource Preferences

Approval History Communication Sub. Contact Point Phones Contracts Groups Orders Service Appointments

Related Lists Properties - FieldTracker

Columns

Select fields to display on the related list. You can also re-order the selected fields.

Available Fields	Selected Fields
Created By Alias	Record ID
Created Date	Created By
JSON	Action
Last Activity Date	
Last Modified By	
Last Modified By Alias	
Last Modified Date	
Object Name	

Sort By: Record

Ascending  Descending

Buttons

OK Cancel Revert to Defaults

Now click Ok.

**PART 4**  
Configuring Tracking In Salesforce Classic  
Adding Related List For Accessing Tracking Record





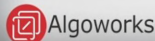
# PART 4.1 - ADDING RELATED LISTS FOR ACCESSING TRACKING RECORD

Click on "Save" after selecting "Yes"

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

The screenshot shows the Salesforce Classic interface for configuring related lists. A dialog box is open in the center, asking: "Overwrite Users' Related List Customizations? You have added or moved related lists on this page layout. Do you want these changes to overwrite users' personal related list customizations?" with "Yes", "No", and "Cancel" buttons. The background shows the "Related Lists" section with tables for FieldTracker, Contacts, Opportunities, and Cases. A "Save" button is highlighted in the top left corner of the interface.

**PART 4**  
Configuring Tracking In Salesforce Classic  
Adding Related List For Accessing Tracking Record





# PART 4.1 - ADDING RELATED LISTS FOR ACCESSING TRACKING RECORD



Now go to **Accounts**.

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**PART 4**  
Configuring Tracking In Salesforce Classic  
Adding Related List For Accessing Tracking Record

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

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**PART 4**  
Configuring Tracking In Salesforce Classic  
Adding Related List For Accessing Tracking Record





Part 4.2

# Track The Changes



# PART 4.2 TRACK CHANGES



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

Account Detail

Account Owner	Algoworks Admin (Change)	Rating	Hot
Account Name	Dickenson plc (New Hierarchy)	Phone	(785) 241-6200
Parent Account		Fax	(785) 241-6201
Account Number	CC12345	Website	http://dickenson-consulting.com
Account Site		Ticker Symbol	
Type	Customer - Direct	Ownership	Private
Industry	Consulting	Employees	120
Annual Revenue	\$5,000,000	SIC Code	6752
Billing Address	1301 Hoch Drive Lawrence 66045 KS USA	Shipping Address	1301 Hoch Drive Lawrence 66045 KS USA
Customer Priority	Low	SLA	Bronze
SLA Expiration Date	27/01/2021	SLA Serial Number	7425
Number of Locations	2	Upsell Opportunity	No
Active	No		
Created By	Algoworks Admin 02/07/2020, 4:37 pm	Last Modified By	Algoworks Admin 25/09/2020, 4:59 pm
Description			
Custom Links	Billing		

FieldTracker

Algoworks

Maps

**PART 4**  
Configuring Tracking In Salesforce Classic  
Track The Changes

Account Edit

Dickenson plc

Account Edit

Account Information

Account Owner	Algoworks Admin	Rating	Hot
Account Name	Dickenson plc	Phone	(785) 241-6200
Parent Account		Fax	(785) 241-6201
Account Number	CC12345	Website	dickenson-consulting.com
Account Site		Ticker Symbol	
Type	Customer - Direct	Ownership	Private
Industry	Consulting	Employees	120
Annual Revenue	5,000,000	SIC Code	6752

Address Information

Billing Street	1301 Hoch Drive	Shipping Street	1301 Hoch Drive
Billing City	Lawrence	Shipping City	Lawrence
Billing Zip/Postal Code	66045		
Billing State/Province	ks		

Algoworks

**PART 4**  
Configuring Tracking In Salesforce Classic  
Track The Changes





# PART 4.2 - 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 Help for this Page

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 Rating: Cold

Account Name: Dickenson plc Phone: (785) 241-6200

Parent Account: Parent Account (lookup icon) Fax: (785) 241-6201

Account Number: CC9999 Website: dickenson-consulting.com

Account Site: Ticker Symbol:

Type: Installation Partner Ownership: Private

Industry: Consulting Employees: 120

Annual Revenue: 5,00,00,000 SIC Code: 6752

Address Information

Copy Billing Address to Shipping Address

Billing Street: 1301 Hoch Drive Shipping Street: 1301 Hoch Drive

Billing City: Lawrence Shipping City: Lawrence

Billing Zip/Postal Code: 66045 Shipping Zip/Postal Code: 66045

Billing State/Province: KS Shipping State/Province: KS

Billing Country: USA Shipping Country: USA

Additional Information

Algoworks

PART 4  
Configuring Tracking In Salesforce Classic  
Track The Changes

Click on "Save"  
after Necessary  
Changes are  
made





# PART 4.2 TRACK CHANGES



algoworksfieldtracker-dev-ed.my.salesforce.com/0012w00000fyLk

Account Name: Dickenson plc (View Hierarchy) Phone: (785) 241-6200  
 Parent Account: Dickenson plc (View Hierarchy) Fax: (785) 241-6201  
 Account Number: CC9999 Website: <http://www.dickenson-consulting.com>  
 Account Site: Ticker Symbol  
 Type: Installation Partner Ownership: Private  
 Industry: Consulting Employees: 120  
 Annual Revenue: \$5,000,000 SIC Code: 6752  
 Billing Address: 1301 Hoch Drive Lawrence 66045 KS USA  
 Shipping Address: 1301 Hoch Drive Lawrence 66045 KS USA  
 Customer Profile: SLA: Bronze  
 SLA Expiration: SLA Serial Number: 7425  
 Number of Locations: Upsell Opportunity: No  
 Created By: Algoworks Admin 25/09/2020, 5:02 pm  
 Last Modified By: Algoworks Admin 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   Del	0004	Algoworks Admin 25/09/2020, 5:02 pm	Changed Account Number from CC12345 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 4**  
Configuring Tracking In Salesforce Classic  
Track The Changes

Algoworks

algoworksfieldtracker-dev-ed.my.salesforce.com/0012w00000fyLk

Account Name: Dickenson plc (View Hierarchy) Phone: (785) 241-6200  
 Parent Account: Dickenson plc (View Hierarchy) Fax: (785) 241-6201  
 Account Number: CC9999 Website: <http://www.dickenson-consulting.com>  
 Account Site: Ticker Symbol  
 Type: Installation Partner Ownership: Private  
 Industry: Consulting Employees: 120  
 Annual Revenue: \$5,000,000 SIC Code: 6752  
 Billing Address: 1301 Hoch Drive Lawrence 66045 KS USA  
 Shipping Address: 1301 Hoch Drive Lawrence 66045 KS USA  
 Customer Profile: SLA: Bronze  
 SLA Expiration: SLA Serial Number: 7425  
 Number of Locations: Upsell Opportunity: No  
 Created By: Algoworks Admin 25/09/2020, 5:02 pm  
 Last Modified By: Algoworks Admin 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   Del	0004	Algoworks Admin 25/09/2020, 5:02 pm	Changed Account Number from CC12345 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 4**  
Configuring Tracking In Salesforce Classic  
Track The Changes

Algoworks







# PART 4.2 TRACK CHANGES



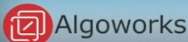
You can now see that the action has been tracked.

The screenshot shows the Salesforce interface for 'Standard Objects Summary'. The record ID is 0024, owned by 'Algoworks Admin'. The 'Action' field is expanded to show a list of tracked changes: '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'. The record was created and last modified by 'Algoworks Admin' on 25/09/2020 at 5:02 pm.

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PART 4

Configuring Tracking In Salesforce Classic  
Track The Changes





# OBJECT DELETION - FIELD TRACKING



The screenshot shows a Salesforce browser window with the following details:

- Browser Tabs:** Home | Salesforce, 0021 | Salesforce
- URL:** algoworksfiedtracker-dev-ed.lightning.force.com/lightning/r/FieldTracker\_\_Standard\_Summary\_\_c/a012w00000OT19aAAD/view
- Navigation:** Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, \*0021
- Record Header:** Standard Objects Summary 0021. Buttons: New Contact, Edit, New Opportunity (with a dropdown arrow circled in red).
- Details Section:**
  - Record ID: 0021
  - Object Name: Account
  - Owner: Algoworks Admin
  - Account: United Oil & Gas Corp.
  - Created By: Algoworks Admin, 10/09/2020, 10:30 pm
  - Action: Changed Account Number from CD1234 to CD12345, Changed Active from No to Yes
  - Last Modified By: Algoworks Admin, 10/09/2020, 10:30 pm
- Activity Section:**
  - Buttons: New Event, New Task, Log a Call, Email
  - Input: Create new... Add
  - Filters: All time · All activities · All types
  - Refresh · Expand All · View All
  - Section: Upcoming & Overdue
  - Text: No next steps. To get things moving, add a task or set up a meeting.
  - Text: 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 5 :

# Configuring Tracking In Salesforce Lightning



A high-angle, close-up photograph of a person's hands typing on a silver laptop keyboard. The person is wearing a light-colored, vertically striped button-down shirt. The laptop is open on a white desk. In the background, another laptop is partially visible, and a white card with the word 'Calendar' is on the desk. The overall scene is brightly lit and clean.

Part 5.1

# Providing the Field Accessibility

# PART 5.1 - PROVIDING THE FIELD ACCESSIBILITY

Go to *Standard Objects Summary* section.

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

The screenshot shows the Salesforce Object Manager interface. At the top, there is a search bar with the text 'Standard' entered. Below the search bar, a table lists objects. The table has columns for LABEL, API NAME, DESCRIPTION, LAST MODIFIED, DEPLOYED, and CUSTOM. The first row in the table is for 'Standard Objects Summary'.

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	✓	✓



# PART 5.1 - PROVIDING THE FIELD ACCESSIBILITY

Select the **Lookup** field for which the **related list** needs to be set up.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account	FieldTracker__FieldTracker_Account__c	Lookup(Account)		✓
Action	FieldTracker__Action__c	Rich Text Area(131072)		
Created By	CreatedById	Lookup(User)		
JSON	FieldTracker__JSON__c	Long Text Area(131072)		
Last Modified By	LastModifiedById	Lookup(User)		
Object Name	FieldTracker__Object_Name__c	Text(255)		
Owner	OwnerId	Lookup(User/Group)		✓
Decent IT	Name			

Algoworks PART 5 Configuring Tracking In Salesforce Lightning Providing the Field Accessibility

Click on **View Field Accessibility**.

Field Label	Account	Object Name	Standard Objects Summary
Field Name	FieldTracker_Account	Data Type	Lookup
Namespace Prefix	FieldTracker		
API Name	FieldTracker__FieldTracker_Account__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Algoworks Admin	25/09/2020	4:57 pm
Modified By	Algoworks Admin	25/09/2020	4:57 pm

Algoworks PART 5 Configuring Tracking In Salesforce Lightning Providing the Field Accessibility



# PART 5.1 - 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**

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

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

**PART 5**  
Configuring Tracking In Salesforce Lightning  
Providing the Field Accessibility

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

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

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

**PART 5**  
Configuring Tracking In Salesforce Lightning  
Providing the Field Accessibility



# PART 5.1 - PROVIDING THE FIELD ACCESSIBILITY

salesforce

SETUP > OBJECT MANAGER  
Standard Objects Summary

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

User	Field	Visibility
Analytics Cloud Integration User		Hidden
Analytics Cloud Security User		Hidden
Contract Manager		Hidden
Cross Org Data Proxy User		Hidden
Custom: Marketing Profile		Hidden
Custom: Sales Profile		Hidden
Custom: Support Profile		Hidden
Force.com - App Subscription User		Hidden
Force.com - Free User		Hidden
Gold Partner User		Hidden
Identity User		Hidden
Marketing User		Hidden
Minimum Access - Salesforce		Hidden
Partner App Subscription User		Hidden
Partner Community Login User		Hidden
Partner Community User		Hidden
Read Only		Hidden
Silver Partner User		Hidden
Solution Manager		Hidden
Standard Platform User		Hidden
Standard User		Hidden
System Administrator		Hidden
Work.com Only User		Hidden
Profiles		Hidden

Algoworks

PART 5  
Configuring Tracking In Salesforce Lightning  
Providing the Field Accessibility

SETUP  
Object Manager

Access Settings for Standard Objects Summary Field Account

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

Save Cancel

Field-Level Security:

Profile	Field	Visible	Read-Only
System Administrator	Account	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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

Page Layout	Section	Field	Visible	Read-Only	Required
Standard Objects Summary Layout	Information	Account	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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.

Algoworks

PART 5  
Configuring Tracking In Salesforce Lightning  
Providing the Field Accessibility

Check Visible under Field-Level Security & Page Layout respectively.







# PART 5.1 - PROVIDING THE FIELD ACCESSIBILITY



Click on **Save.**

Access Settings for Standard Objects Summary  
**Account**

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

Field-Level Security:

Profile	Field	Visible	Read-Only
System Administrator	Account	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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	Section	Field	Visible	Read-Only	Required
Standard Objects Summary Layout	Information	Account	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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 each profile.

**PART 5**  
Configuring Tracking In Salesforce Lightning  
Providing the Field Accessibility

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

Standard Objects Summary

Field Access	Field Access
Analytics Admin Integration User	Hidden
Analytics Cloud Security User	Hidden
Contract Manager	Hidden
Cross Org Data Proxy User	Hidden
Custom: Marketing Profile	Hidden
Custom: Sales Profile	Hidden
Custom: Support Profile	Hidden
Force.com - App Subscription User	Hidden
Force.com - Free User	Hidden
Gold Partner User	Hidden
Identity User	Hidden
Marketing User	Hidden
Minimum Access - Salesforce	Hidden
Partner App Subscription User	Hidden
Partner Community Login User	Hidden
Partner Community User	Hidden
Read Only	Hidden
Silver Partner User	Hidden
Solution Manager	Hidden
Standard Platform User	Hidden
Standard User	Hidden
System Administrator	Editable
Work.com Only User	Editable
Profiles	Field Access

Field is editable because of Page Layout

**PART 5**  
Configuring Tracking In Salesforce Lightning  
Providing the Field Accessibility





Part 5.2

# Adding Related List For Accessing Tracking Record



# PART 5.2 - ADDING RELATED LIST FOR ACCESSING TRACKING RECORD



Click on Page Layouts.

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

Singular Label: Account

Track Field History

Plural Label: Accounts

Deployment Status

Help Settings: Standard salesforce.com Help Window

PART 5

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

Algoworks

Go to Account Layout.

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

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 (Setup) Layout	Algoworks Admin, 25/09/2020, 5:30 PM

PART 5

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

Algoworks





# PART 5.2 - ADDING RELATED LIST FOR ACCESSING TRACKING RECORD



Click on **Related Lists**.

Account Layout Editor: Account Owner, Annual Revenue, Customer Priority, D-U-N-S Number, Last Modified By, Operating Hours, Blank Space, Account Site, Billing Address, D&B Company, Employees, NAICS Code, Ownership, Account Name, Account Source, Clean Status, Data.com Key, Fax, NAICS Description, Parent Account, Account Number, Active, Created By, Description, Industry, Number of Locations, Phone.

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

Algoworks

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

Account Layout Editor: Activity History, Cases, Contact Point Ph..., Content Deliveries, Files, Opportunities, Resource Preferences, Approval History, Communication Sub..., Contact Point Ph..., Contracts, Groups, Orders, Service Appointments, Assets, Community Members, Contact Roles, Data Integration..., Notes & Attachments, Partners, Campaigns, Contact Point Add..., Contacts, FieldTracker, Open Activities, Related Content.

Related Lists

Contacts

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

Opportunities

Opportunity Name	Stage	Amount	Close Date
Sample Text	Sample Text		

**PART 5**  
Configuring Tracking In Salesforce Lightning  
Adding Related List For Accessing Tracking Record

Algoworks





# PART 5.2 - ADDING RELATED LIST FOR ACCESSING TRACKING RECORD



Go to **Properties**.

**PART 5**  
Configuring Tracking In Salesforce Lightning  
Adding Related List For Accessing Tracking Record

The screenshot shows the Salesforce Setup interface. The left sidebar is expanded to 'Page Layouts'. Under 'Related Lists', the 'FieldTracker' related list is selected. A blue callout bubble points to the 'Properties' tab. The main content area shows the configuration for the 'FieldTracker' related list, including a table with columns for 'Record ID' and 'Sample Text'. Below this, there is a table for 'Contacts' with columns for 'Contact Name', 'Title', 'Email', and 'Phone'. The bottom of the slide features the Algoworks logo and the text 'PART 5 Configuring Tracking In Salesforce Lightning Adding Related List For Accessing Tracking Record'.

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

**PART 5**  
Configuring Tracking In Salesforce Lightning  
Adding Related List For Accessing Tracking Record

The screenshot shows the Salesforce Setup interface. The left sidebar is expanded to 'Page Layouts'. Under 'Related Lists', the 'FieldTracker' related list is selected. A blue callout bubble contains the text 'Choose any available fields & add them to the Selected fields.' The main content area shows the configuration for the 'FieldTracker' related list. A modal window is open, showing a list of 'Available Fields' and 'Selected Fields'. The 'Available Fields' list includes 'Created By Alias', 'Created Date', 'JSON', 'Last Activity Date', 'Last Modified By', 'Last Modified By Alias', 'Last Modified Date', and 'Object Name'. The 'Selected Fields' list includes 'Record ID', 'Created By', and 'Action'. The modal also has a 'Sort By' dropdown set to '-Default-' and radio buttons for 'Ascending' and 'Descending'. The bottom of the slide features the Algoworks logo and the text 'PART 5 Configuring Tracking In Salesforce Lightning Adding Related List For Accessing Tracking Record'.



# PART 5.2 - ADDING RELATED LIST FOR ACCESSING TRACKING RECORD

salesforce

Setup > OBJECT MANAGER

Account

Related List Properties - FieldTracker

Select fields to display on the related list. You can also re-order the selected fields.

Available Fields	Selected Fields
Created By Alias	Record ID
Created Date	Created By
JSON	Action
Last Activity Date	
Last Modified By	
Last Modified By Alias	
Last Modified Date	
Object Name	

Sort By: Record ID

Ascending

Descending

Buttons

**PART 5**

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

Algoworks

Setup > OBJECT MANAGER

Account

Related List Properties - FieldTracker

Select fields to display on the related list. You can also re-order the selected fields.

Available Fields	Selected Fields
Created By Alias	Record ID
Created Date	Created By
JSON	Action
Last Activity Date	
Last Modified By	
Last Modified By Alias	
Last Modified Date	

Buttons

OK Cancel Revert to Defaults

**PART 5**

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

Algoworks





# PART 5.2 - ADDING RELATED LIST FOR ACCESSING TRACKING RECORD



Click on Save.

Setup - OBJECT MANAGER - Account - Page Layouts (00h2w0000056lmAAE/view)

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

Search Layouts for Salesforce Classic

Quick Save Preview As... Undo Undo Properties

Quick Find: Related List Name

Activity History	Cases	Contact Point Emails	Contact Deliveries	Files	Opportunities	Resource Preferences
Approval History	Communication Sub.	Contact Point Phones	Contracts	Groups	Orders	Service Appointments
Assets	Community Members	Contact Roles	Data Integration	Notes & Attachments	Partners	
Campaigns	Contact Point Add.	Contacts	FieldTracker	Open Activities	Related Content	

Custom Links (Header not visible)

Billing

Mobile Cards (Salesforce mobile only)

Twitter

Related Lists

FieldTracker	New Change Owner
Record ID	Created By
Sample Text	Sample Text

Contacts

Algoworks

PART 5

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.

Search Accounts and more...

Accounts Contacts Campaigns Dashboards Reports Chatter More

Account Unit

Type Installation

Account Owner Algoworks Admin

Account Site Industry Energy

Follow New Contact New Case New Note

Related

We found no potential duplicates of this account.

FieldTracker (0)

Contacts (4)

Lauren Boyle  
Title: SVP, Technology  
Email: lboyle@uog.com  
Phone: (212) 842-5500

Avi Green  
Title: CFO  
Email: agreen@uog.com  
Phone: (212) 842-5500

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.

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PART 5

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



A top-down view of a person's hands typing on a silver laptop keyboard. The person is wearing a grey and white striped shirt. The laptop is on a white desk. In the background, there is a white notebook with the word 'Calendar' visible on its cover.

Part 5.3

# Track The Changes





# PART 5.3 - TRACK THE CHANGES



The screenshot displays the Salesforce Lightning interface for an account named "United Oil & Gas Corp.". The top navigation bar includes "Sales", "Home", "Opportunities", "Leads", "Tasks", "Files", "Accounts", "Contacts", "Campaigns", "Dashboards", "Reports", "Chatter", and "More". The account details section shows the following information:

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

The "Details" tab is active, showing fields for Account Owner (Algoworks Admin), Rating (Hot), Account Name (United Oil & Gas Corp.), Parent Account (Search Accounts...), Account Number (CD12345), Phone ((212) 842-5500), Fax ((212) 842-5501), and Website (http://www.uos.com). The "Activity" tab is also visible, showing options for New Task, Log a Call, New Event, and Email, with a "Create new..." button and an "Add" button. The activity section includes filters for "All time", "All activities", and "All types", and a "Refresh" button. The "Upcoming & Overdue" section shows "No next steps."

**PART 5**  
Configuring Tracking In Salesforce Lightning  
Track The Changes





# PART 5.3 - TRACK THE CHANGES



The screenshot shows the Salesforce interface for an Account record. The account name is "United Oil & Gas Corp.". The record is currently in edit mode. A blue callout bubble with a white border and a drop shadow points to the "Save" button at the bottom of the form. The "Save" button is highlighted in yellow. The form contains various fields: "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), "Upsell Opportunity", and "Active" (set to No). The "Created By" field shows "Algoworks Admin, 02/07/2020, 23/09/2020, 3:35 pm". The "Description" field contains the text "World's third largest oil and gas company".

**Now click on Save.**

After making necessary changes in the record, Click on Save to save those changes





# PART 5.3 - TRACK THE CHANGES



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

The screenshot displays the Salesforce Lightning interface for an account record. The top navigation bar includes 'Sales', 'Home', and 'Opportunities'. The main content area is divided into two sections: 'Details' and 'Activity'.

**Details Section:**

Field	Value
Record ID	0025
Object Name	Account
Owner	Algoworks Admin
Account	United Oil & Gas Corp.
Created By	Algoworks Admin, 25/09/2020, 5:53 pm
Last Modified By	Algoworks Admin, 25/09/2020, 5:53 pm

**Activity Section:**

The 'Activity' section shows a list of actions taken on the account:

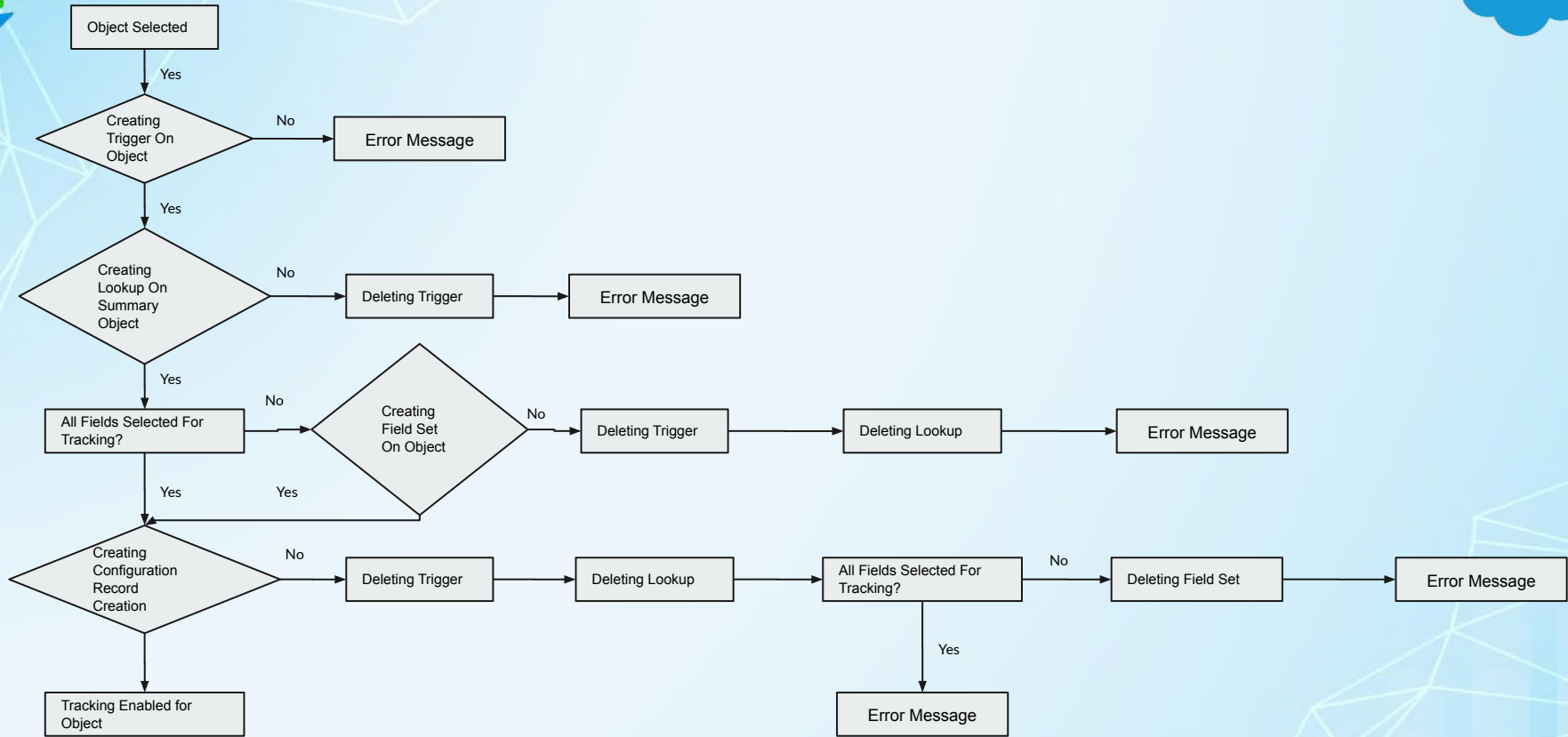
- Changed Account Number from CD12345 to CD9999
- Changed Account Rating from Hot to Cold
- Changed Account Type from Installation Partner to Customer - Direct
- Changed Active from Yes to No


The 'Activity' section also includes a 'New Event' dropdown menu with options for 'New Task', 'Log a Call', and 'Email'. There is a 'Create new...' button and an 'Add' button. Filters are set to 'All time', 'All activities', and 'All types'. The activity list shows 'Upcoming & Overdue' with 'No next steps' and a note: 'To get things moving, add a task or set up a meeting.' Below this, it states '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.



Part 6 :

# Remove Tracking





Part 6.1

# 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

Standard Object Relationship: 1/40

Custom Object Relationship: 0/40

Add New Object + All S C

<input type="checkbox"/>	S.NO	OBJECT NAME	STATUS	SELECTED FIELDS	ACTION
<input type="checkbox"/>	1	Account	<input checked="" type="checkbox"/> Active	Account Name,Account Number,Account Type,Active,Annual Revenue,Owner ID	

javascript:void(0);

Type here to search

10:34 PM 10-Sep-20







# OBJECT DELETION - FIELD TRACKING



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

Algoworks

Custom Object Relationship 1/40

Add New Object All S C

<input checked="" type="checkbox"/>	S.NO	OBJECT NAME ↓	STATUS ↓	SELECTED FIELDS	ACTION
<input checked="" type="checkbox"/>	1	Account	<input checked="" type="checkbox"/> Active	Account Description,Account Name,Account Number,Account Rating,Account Site,Account Type,Active	
<input checked="" type="checkbox"/>	2	Custom Object	<input checked="" type="checkbox"/> Active	<input checked="" type="checkbox"/> all Fields	

Deactivate Activate

Algoworks

**PART 5**  
Remove Tracking  
Remove Tracking On Temporary Basis

Check the *objects* from the list.

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





# OBJECT DELETION - FIELD TRACKING



Field Tracker Home Configuration Setup Tracking Configuration Exception

## Field Tracking Configuration Page

Standard Object Relationship

1/40 /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	<input checked="" type="checkbox"/> 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.





Part 6.2

# 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

Algoworks

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

Add New Object + | All | S | C

<input type="checkbox"/>	S.NO	OBJECT NAME	STATUS	SELECTED FIELDS	ACTION
<input type="checkbox"/>	1	Account	<input checked="" type="checkbox"/> 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



CONFIRMATION

Are you sure you want do delete this tracking?

Cancel OK

S.NO	OBJECT NAME	ACTION
1	Account	

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





## Removing Tracking For Selected Objects

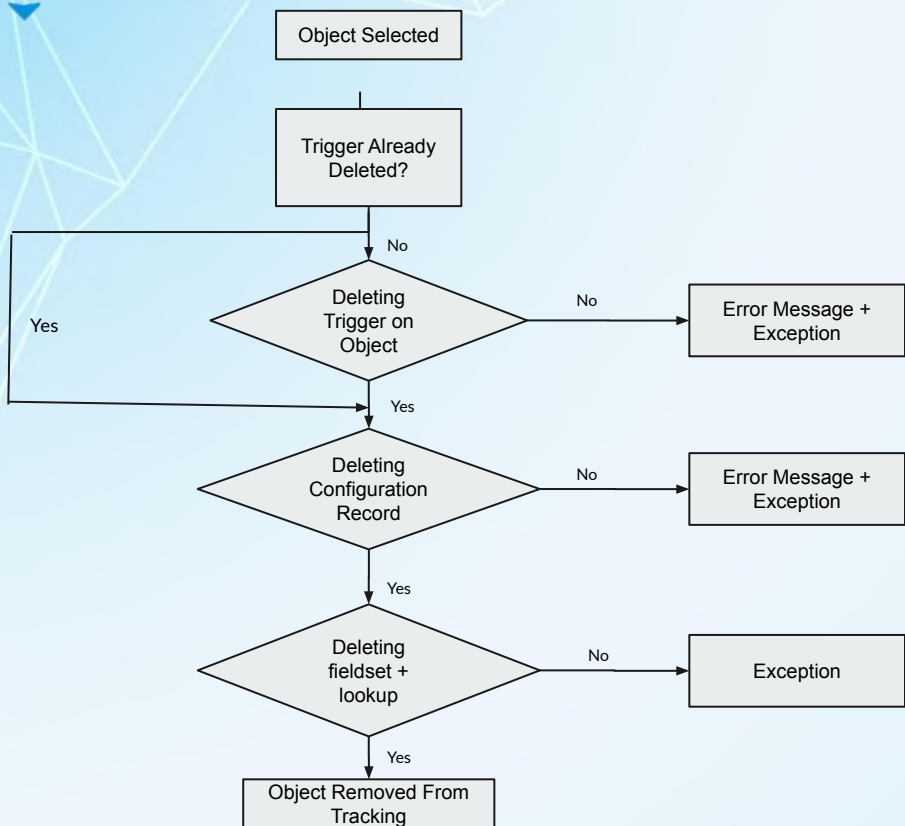
### - Removing Tracking on Permanent Basis

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 Object.

**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**

