



Field Tracker App

POWERED BY  Algoworks

Frequently Asked Questions (FAQs)

Salesforce administrators can now have a single interface to manage fields' data tracking for both standard and custom objects!



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.





I can see from your demo video online that field history is added as a related list and that each time an object is edited it creates a field tracking record containing details of the field changes. Please may I ask if it is possible to build any automations based on the creation of this record? Is field tracking available as an object for record-triggered flows, for example?



Yes, we are tracking the data changes by creating records in our custom objects (Standard_Summary and Custom_Summary) and you can build custom automation on creation and updation of records on those objects if required.

If you are planning to build an automation using trigger event, make sure you are NOT designing this automation based on “before insert” trigger event as we are performing action in our package using similar event. Creation of such multiple and connected “before insert” trigger events may impact your system performance and lead to data anomalies.





Is there any limit on the number of fields that you can track per object?



There is no such limit. The architecture and design of this app leverage the fieldset concept to store the “field tracking” configuration metadata at the object level and provide us a scalable solution.

Also, you can check the "Select All" checkbox field while enabling the configuration for any object to track all the fields of that specific object. Again the architecture and design of this app allow to capture the objects' fields dynamically so, any changes in the object data model and fields structure will be automatically handled under this “Select All” option.





For context, we are interested in using this for custom objects that are used in a community/experience. Our external community users will be able to edit records that are related to their account from within the community and we would like our internal team to be aware of any changes that are made (ideally we would notify the internal team of changes by automatically creating a case for them when a field tracking record is created). Is field tracking still possible if a community/experience user edits the field?



Yes tracking is applicable even for external users. Algoworks solution is creating the tracking records using the trigger event on the objects irrespective of the user that made the changes. So if the community users modify any data, the object trigger will still execute and create the tracking record.





I'm looking for a solution which will allow me to track what automation/workflow/rule triggers a field change. Does your app do this?



Algoworks app is tracking the manual changes performed by users on the tracking enabled objects and we are using the trigger event to create those records so the app will update the record history with the username who initialized that trigger.

In the case of workflow, trigger events do not fire so this app will not be able to track those changes.

Also, if the data is modified by other automation tools through which we get the trigger event then the record history will be updated by the same username who initialized the data change process via automation tool.





During setup, I simply added the Account object with only 3 fields. While saving my configuration it took about ~1 minute to complete. This is okay and no problem for me. However, I'm curious, if a user were to select 40+ fields that they want to track, how long would a user expect to see the loading take?



Time taken in the configuration depends on the time taken by the deployment process, as the Algoworks App deploys the trigger and its test class on the object selected for tracking.

Time taken to complete the configuration does not depend on the number of fields selected while enabling tracking for any object. Also, fields can be added/removed easily & quickly once the configuration is set up and activated for any object.





In the native functionality, all the History records are split into their own lines. In Field Tracker, all the changes are saved into a single record. I think this is convenient; however, if a user wants to report on Field Changes using Field Tracker, it would be difficult to analyze?



Yes, you are correct that the history records showing on the Field Tracker related list are showing up differently than Salesforce native functionality. This is by design to allow better review and tracking of records manually as well as via reports.

If you wish to report on each field data value change separately, you can plan to use FieldTracker__JSON__c field which contains the same data value changes in the JSON format and would allow you to split data change of each field if needed via parsing at your end. The field is not showing on the page layout but can be accessible and the format is easy to understand.

We have this enhancement in the future phases to provide field-wise data changes in separate records but as an interim solution, this JSON field could be leveraged if needed.





In Field Tracker, is it possible to have multiple changes split into their own records as an option? This way, if someone wants to make a report on a single field it would be easier to parse out the information.

I tried to create another configuration on the Account object but it let me only make one. Thanks and I look forward to hearing from you.



Neither the user can create the multiple configuration for any object nor it is recommended as the configuration creates the trigger on the object and multiple triggers on same object may cause unexpected issues.

If you wish to report on each field data value change separately, you can plan to use FieldTracker__JSON__c field which contains the same data value changes in the JSON format and would allow you to split data change of each field if needed via parsing at your end. The field is not showing on the page layout but can be accessible and the format is easy to understand.

We have this enhancement in the future phases to provide field-wise data changes in separate records but as an interim solution, this JSON field could be leveraged if needed.





Upon further testing, is it possible to report on the Field Tracker object? I see "Field Tracker Exceptions" is able to report on but I don't believe that is the type of data we are looking for. Let me know if I'm missing something.



Yes, Field Tracker App stores the historical tracking data on the FieldTracker_Standard_Summary_c and FieldTracker_Custom_Summary_c Objects for the standard and custom objects respectively. Reporting can be done on both the objects.





Do we need to setup configuration for each objects for their field tracking?



Yes, you have to set up configuration for each of the objects to track field history. The history tracking starts accumulating additional data in your Salesforce Org and hence we advise to review and decide your objects list judiciously before setting up the configuration to keep your data storage consumption to a minimum.





I am trying to configuration setup for Campaign Member object but I am getting issue with that object. Do you have any idea related to this issue?



Yes, this is the limitation of Salesforce. In order to track historical data changes of an object, we are required to create a lookup into our package-specific custom objects to that specific object present in your Org.

Now, because of Salesforce limitation, we can't create a lookup relationship to Campaign Member object. Hence, we can't overwrite Salesforce limitations and track changes on Campaign member.





I installed your FieldTracker software today and all seems good in the installation but when I try to configure an object to track, then, the thinking screen stays there and nothing happens.



This issue usually occurs due to remote site settings not configured properly. You have to refer **FAQ #26** and follow the exact instructions.





I installed your FieldTracker App and configured field tracking on User object. Can you help me figure out how to track which user was changed? I see that I made the change and I see the values, but not which user was changed.



This issue is related to permission and layout configuration. You have to give permission for the User custom field in the **Standard Object Summary** object. After that you have to add that field in the **Standard Object Summary** object's layout.





On reports I am able to create a standard report using report type "Standard Object Summary" It shows me the object and action but fails to show me the record itself that was associated to the changes. For example, if it shows action was taken on lead field but doesn't show exactly which record was changed.



You have to add the lead lookup field in the "Standard Object Summary" page layout. You have to give permission to the same field to the user then you can also add the same field in your report. After that you can see the record in the details page and report as well on which you have made changes.





I am trying to create a configuration setup for an object which is relate to CPQ managed package. I am not able to configuration setup for the same. Any Idea, what is the issue?



You are trying to create configuration setup for an object which is the part of the managed package. As of now, we are not supporting these objects for field tracking. We are planning to support these objects in the future releases.





#Can_we?



FAQ #10

Can we track changes in rich text fields which are >255 characters on Task? (e.g. Task Comment)

We can track the changes of Rich Text Fields of any object for which our app allows tracking. Although, currently our app does not provide the facility to track the changes of TASK Objects as it does not allow us to create a lookup relationship.

FAQ #11

Can we provide reporting capabilities on these tracked changes?

We can use the tracked changes for reporting purposes for any object on which our app allows tracking.



FAQ #12

Can we track changes in Chatter Post? (FeedItem and FeedComment SObject)

Our package does not allow to track changes for FeedItem and FeedComment SObject as we cannot create either the lookup relationship for field set for both the objects.

FAQ #13

Can we track Task deletion?

No, as we're not able to enable tracking on task objects.





FAQ #14

Can we provide reporting capabilities on these tracked changes?

We can use the tracked changes for reporting purposes for any object on which our app allows tracking.

FAQ #15

Can we track Track user deactivation for more than 6 months ago?

Yes, as our app allows tracking on user subject so user deactivation can also be tracked.





FAQ #16

Can this track custom object fields? Is there a limit as to how many fields can be tracked?

Yes, it can track the custom object fields. There is no such limit on the number of fields that can be enabled for tracking.

FAQ #17

Can this track changes made by external users? Such as Community/Experience Users?

Yes, but only those changes can be tracked on which we will get the trigger hit.



FAQ #18

Can this capture complex data types including roll-up summary, multi-select, and cross-object formula fields?

Yes, most of the fields can be enabled for tracking but formula fields can not be tracked.

FAQ #19

Can we migrate old field history data from a previous field history app to this app?

We can but old data should be in the Below mentioned JSON Format:

```
{"AccountNumber": {"Label": "Account Number", "newValue": "4321", "oldValue": "1234"}}
```





#Is_there?



FAQ #20

Is there support for Classic and Lightning UI?

It supports both the user interfaces - Classic & Lightning UI.

FAQ #21

Is there a UI for users to view the field history? How would users view field history? Does it follow field-level security?

Field History can be seen under the related list of the object. Every history record is saved as an object record so it follows all the security that we can provide to a record of any object.



FAQ #22

What is the maximum retention period of the field that this app can give us as the Salesforce OOTB only gives us 18 months? Is there a limit as to how far back the changes are stored? Can old changes be archived?

There is no limit on the retention period. History records can be retained as long as you want. This app doesn't provide any automatic way of archival or purging of records. You need to manually purge or archive the records as per your needs or create a batch and schedule a job on daily basis to delete older data.

FAQ #23

Is there a way to run reports on the data?

Yes, a report can be created on the summary objects which contain the history records.



FAQ #24

Where is the data stored internally or externally in Salesforce of the field history tracking? If internally, are field history records stored on Salesforce Data Storage space or File storage space?

Data is stored internally inside Salesforce. It is stored as a record of our custom objects (FieldTracker_Standard_Summary_c and FieldTracker_Custom_Summary_c Objects for the standard and custom objects respectively) and hence consumes the data storage space.

FAQ #25

Is there any limit on the number of fields that you can track per object?

No limit. The fields we choose to track during the tracking configuration are stored in the field set of that object and there is no such limit on the number of fields to add in a fieldset. Also, we can check the "Select All" checkbox field while enabling the configuration for any object to track all fields of that object. In select all fields case our package does not store the fields instead during the changes made by the user our package query all the fields directly from schema.





#How_to?



How to set up & configure Remote Site Settings?

Create a Remote Site Setting in your org with below description:

Name: FieldTracker

URL: follow below steps to get the URL

How to get URL for creating Remote Site Setting:

1. Switch to the **Classic Mode** if you're using Lightning Mode.
2. Open **Field Tracker App** from the **App Launcher**.
3. Click on the **Configuration Setup Tab**.
4. Select the URL from the address bar.
5. Copy the URL from beginning to **fieldtracker.visualforce.com**

For Eg: URL in the address bar :

<https://algoworksfldtracker-dev-ed--fieldtracker.visualforce.com/apex/FieldConfigVFPPage?sfdc.tabName=01r2w000000QIRf>

URL for Creating Remote Site Setting :

<https://algoworksfldtracker-dev-ed--fieldtracker.visualforce.com>





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