# Track Anything!

Instructional Setup Guide

Instructional Video/Demo: https://www.youtube.com/watch?v=wSDE3lEwPR8

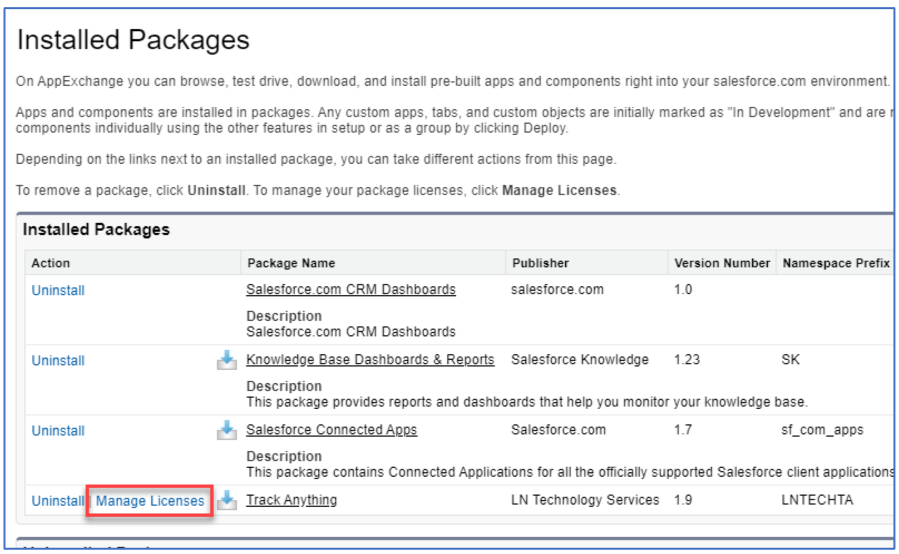
1. Install the package from the AppExchange Listing:
   https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000G137zUAB

2. **Setup and allocate licenses to Track Anything**
   (site-wide licensed orgs can skip this step)

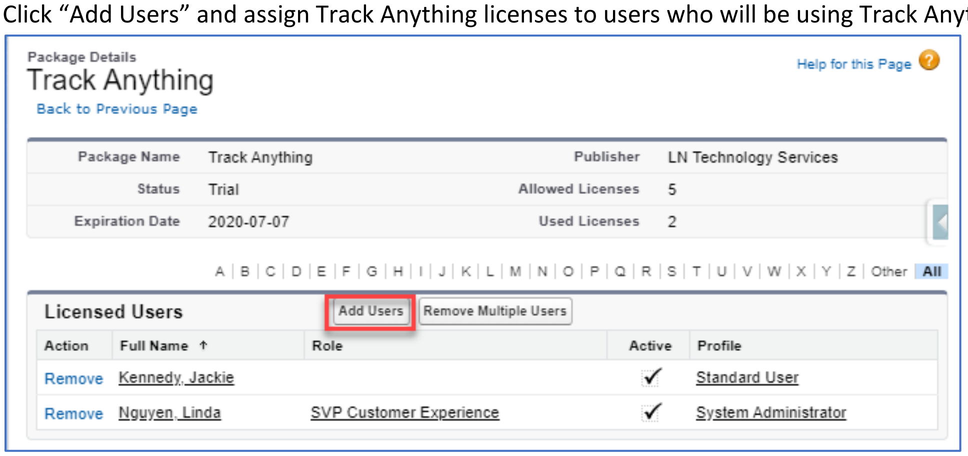
   a. Navigate to…

| | |
|---|---|
| **Lighting Experience** | Setup > Apps > Packaging > Installed Packages |
| **Classic** | Setup > App Setup > Installed Packages |

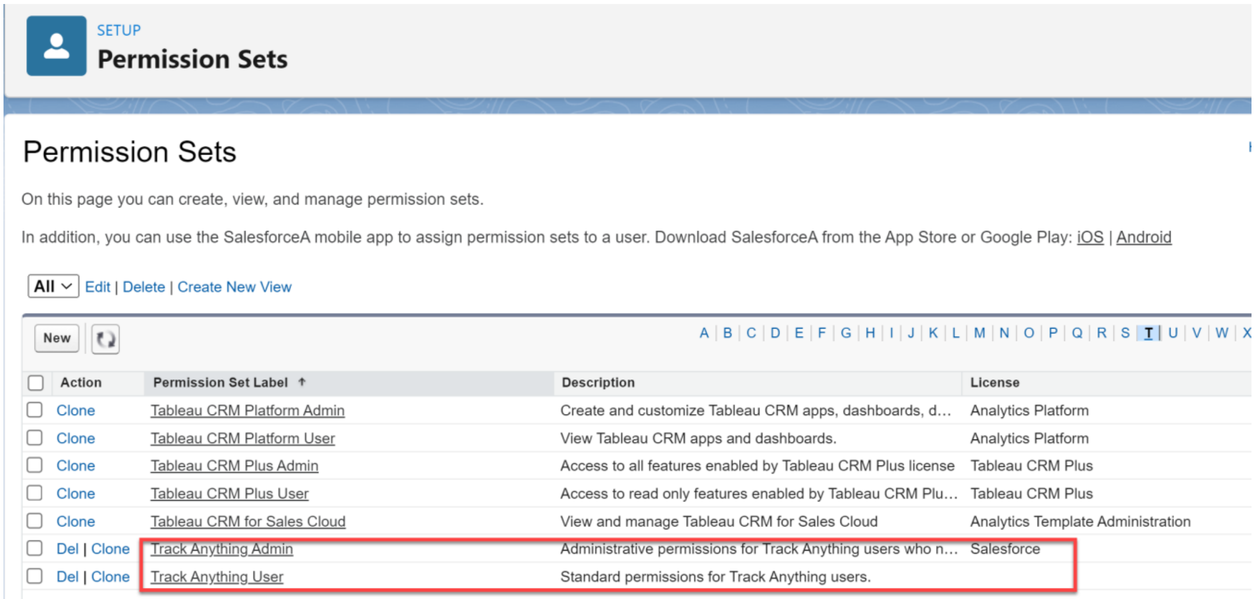
   b. Click "Manage Licenses" next to the Track Anything package




   c. Click "Add Users" and assign Track Anything licenses to users who will be using Track Anything



3. **Assign Permission Sets to Track Anything**




a. Navigate to…

| | |
|---|---|
| **Lighting Experience** | Setup > Users > Permission Sets |
| **Classic** | Setup > Manage Users > Permission Sets |

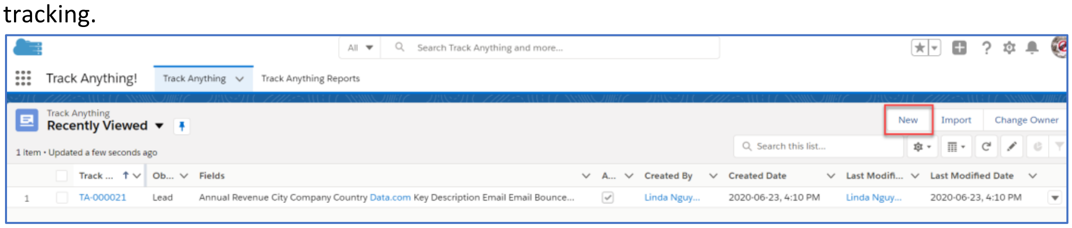
b. Assign Track Anything Administrators the "Track Anything Admin" permission set. Admin permission set will provide access to:
   i. Be tracked by Track Anything
   ii. Manage Track Anything settings
   iii. Run Track Anything Reports and export to csv

   Note: Track Anything admins should be System Administrators with access to the API.

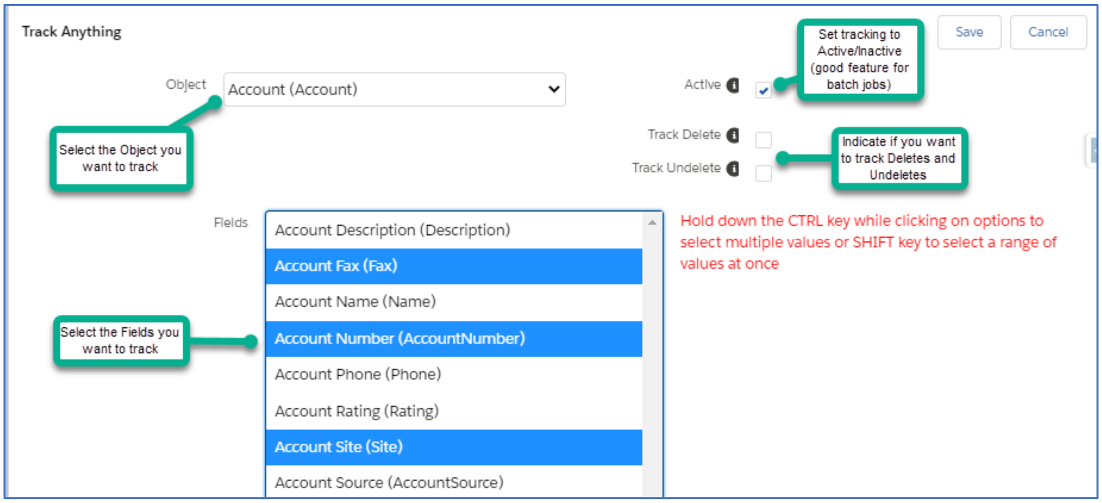
c. Assign all other Track Anything users the "Track Anything User" permission set. Standard permission set will provide access to:
   i. Be tracked by Track Anything
   ii. Note: Versions 3.2 and earlier used the permission set "Track Anything Standard". Version 3.3 and later uses the "Track Anything User" permission set.

4. **Setup Object for Tracking**

a. Navigate to the Track Anything App via the App Launcher and click "New" to setup an object for tracking.



b. Fill out the Track Anything record and click "Save"

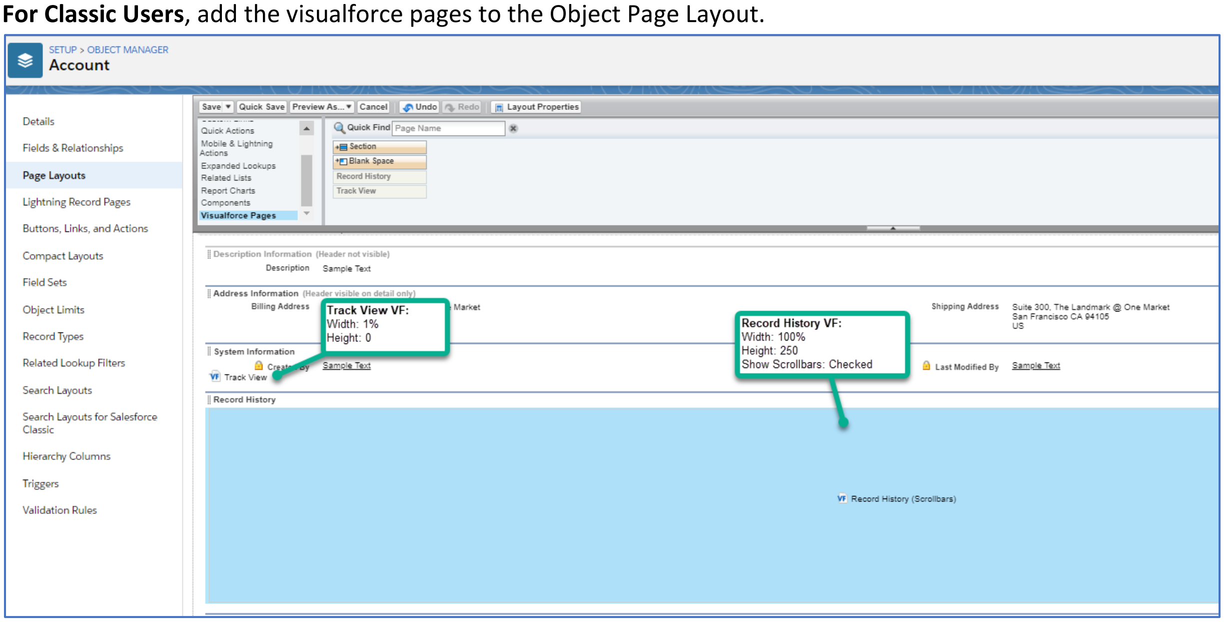



5. **Add Record History and Track View visualforce pages to Object Page Layout/Lightning Record Page**

Add the **"Record History"** visualforce page to the Object Page Layout or Lightning Record Page to view field history for the record.

Add the **"Track View"** visualforce page to the Object Page Layout or Lightning Record Page to track when users view the record.

**For Classic Users**, add the visualforce pages to the Object Page Layout.



**For Lightning Experience Users**, add the visualforce pages to the Object Lightning Record Page.