



Track Anything!

Instructional Setup Guide

Instructional Video/Demo: <https://www.youtube.com/watch?v=wSDE3IEwPR8>

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

Installed Packages

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment.

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as “In Development” and are components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

Action	Package Name	Publisher	Version Number	Namespace Prefix
Uninstall	Salesforce.com CRM Dashboards Description Salesforce.com CRM Dashboards	salesforce.com	1.0	
Uninstall	Knowledge Base Dashboards & Reports Description This package provides reports and dashboards that help you monitor your knowledge base.	Salesforce Knowledge	1.23	SK
Uninstall	Salesforce Connected Apps Description This package contains Connected Applications for all the officially supported Salesforce client applications	Salesforce.com	1.7	sf_com_apps
Uninstall Manage Licenses Download	Track Anything	LN Technology Services	1.9	LNTECHTA

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

Package Details
Track Anything
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Package Name	Track Anything	Publisher	LN Technology Services
Status	Trial	Allowed Licenses	5
Expiration Date	2020-07-07	Used Licenses	2

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

Licensed Users **Add Users** [Remove Multiple Users](#)

Action	Full Name ↑	Role	Active	Profile
Remove	Kennedy, Jackie		✓	Standard User
Remove	Nguyen, Linda	SVP Customer Experience	✓	System Administrator



3. Assign Permission Sets to Track Anything

SETUP
Permission Sets

Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All | [Edit](#) | [Delete](#) | [Create New View](#)

[New](#)

[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#)

☐ Action	Permission Set Label ↑	Description	License
☐ Clone	Tableau CRM Platform Admin	Create and customize Tableau CRM apps, dashboards, d...	Analytics Platform
☐ Clone	Tableau CRM Platform User	View Tableau CRM apps and dashboards.	Analytics Platform
☐ Clone	Tableau CRM Plus Admin	Access to all features enabled by Tableau CRM Plus license	Tableau CRM Plus
☐ Clone	Tableau CRM Plus User	Access to read only features enabled by Tableau CRM Plu...	Tableau CRM Plus
☐ Clone	Tableau CRM for Sales Cloud	View and manage Tableau CRM for Sales Cloud	Analytics Template Administration
☐ Del Clone	Track Anything Admin	Administrative permissions for Track Anything users who n...	Salesforce
☐ Del Clone	Track Anything User	Standard permissions for Track Anything users.	

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:

- Be tracked by Track Anything
- Manage Track Anything settings
- 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:

- Be tracked by Track Anything
- 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.

The screenshot shows the Track Anything app interface. At the top, there's a navigation bar with 'Track Anything!' and 'Track Anything Reports'. Below that, a 'Recently Viewed' section shows a list of items. A 'New' button is highlighted in red in the top right corner of the main content area. The bottom of the screen shows a table with columns for 'Track ...', 'Fields', 'Created By', 'Created Date', 'Last Modif...', and 'Last Modified Date'. The first row in the table has the value 'TA-000021' in the 'Track ...' column.



- b. Fill out the Track Anything record and click “Save”

The screenshot shows the 'Track Anything' form. Annotations include:

- Select the Object you want to track:** Points to the 'Object' dropdown menu, which currently shows 'Account (Account)'.
- Select the Fields you want to track:** Points to the 'Fields' list, which includes 'Account Description (Description)', 'Account Fax (Fax)', 'Account Name (Name)', 'Account Number (AccountNumber)', 'Account Phone (Phone)', 'Account Rating (Rating)', 'Account Site (Site)', and 'Account Source (AccountSource)'.
- Set tracking to Active/Inactive (good feature for batch jobs):** Points to the 'Active' checkbox, which is checked.
- Indicate if you want to track Deletes and Undeletes:** Points to the 'Track Delete' and 'Track Undelete' checkboxes, both of which are unchecked.
- Hold down the CTRL key while clicking on options to select multiple values or SHIFT key to select a range of values at once:** A red text annotation pointing to the 'Fields' list.

Buttons for 'Save' and 'Cancel' are located at the top right.

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

DATE	USER	FIELD	OLD VALUE	NEW VALUE
2020-09-22 04:59 PM	Unde Nguyen	Undeleted		
2020-09-22 04:59 PM	Unde Nguyen	Deleted		
2020-09-22 04:59 PM	Unde Nguyen	State/Province		IL
2020-09-22 04:59 PM	Unde Nguyen	Related Account		Account
2020-09-22 04:59 PM	Unde Nguyen	Phone	1111111111	3222222222
2020-09-22 04:59 PM	Unde Nguyen	Last Name	Simpson	Simple
2020-09-22 04:59 PM	Unde Nguyen	First Name	Uma	Merge

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Showing 7 Records for 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.

The screenshot shows the 'Account' object setup in the 'Visualforce Pages' section. Annotations include:

- Track View VF:** Width: 1% Height: 0
- Record History VF:** Width: 100% Height: 250 Show Scrollbars: Checked

The 'Visualforce Pages' section shows a list of pages: 'Section', 'Blank Space', 'Record History', and 'Track View'. The 'Record History' page is selected, and its properties are shown in the right pane.



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

The screenshot shows a Salesforce Lightning Record Page layout. On the left is a sidebar with a navigation menu. The main content area is divided into sections. The top section is titled 'Custom Links' and contains three links: 'Google Search', 'Google Maps', and 'Hoovers Profile'. Below this is a section titled 'Record History'. This section contains a table with the following headers: 'DATE', 'USER', 'FIELD', and 'OLD VALUE'. The table body shows 'Displaying 0 Records'. Two green callout boxes with arrows point to the 'Record History' section. The first callout box is titled 'Record History VF:' and contains the text: 'Show Label: Checked', 'VF Page Name: Record History', and 'Height: 300'. The second callout box is titled 'Track View VF:' and contains the text: 'Show Label: Unchecked', 'VF Page Name: Track View', and 'Height: 0'.

Record History VF:
Show Label: Checked
VF Page Name: Record History
Height: 300

Track View VF:
Show Label: Unchecked
VF Page Name: Track View
Height: 0