



SMART FIELD HISTORY
ONE PLACE TO TRACK ALL YOUR FIELD HISTORY

Smart Field History Tracker Installation and Setup Guide

Introduction

Smart Field History Tracker is a native Force.com Utility that helps salesforce Users to setup and view any object(standard/custom) record field history and record deletion history.

This tool helps you

- to track Unlimited number of fields
- All field type tracking supported
- Do not use salesforce Data/File storage
- powerful reporting capabilities on history records
- share history information to any user easily
- archive existing standard history information
- and many more

Installing Smart Field History Tracker

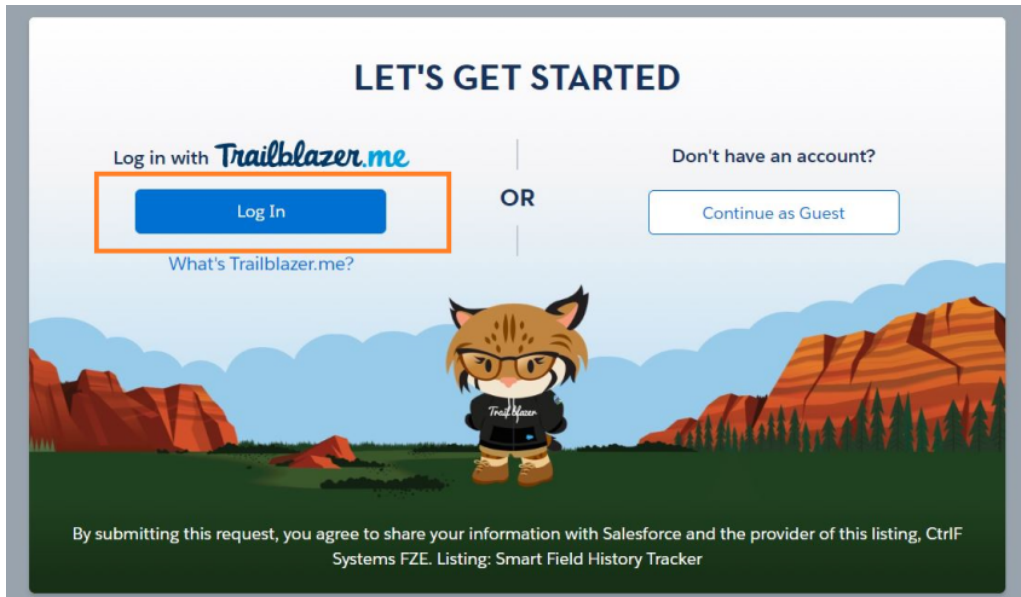
- Locate Smart Field History Tracker Application from Salesforce AppExchange

<https://appexchange.salesforce.com/listingDetail?listingId=aON3u00000QtwujEAB&tab=e>

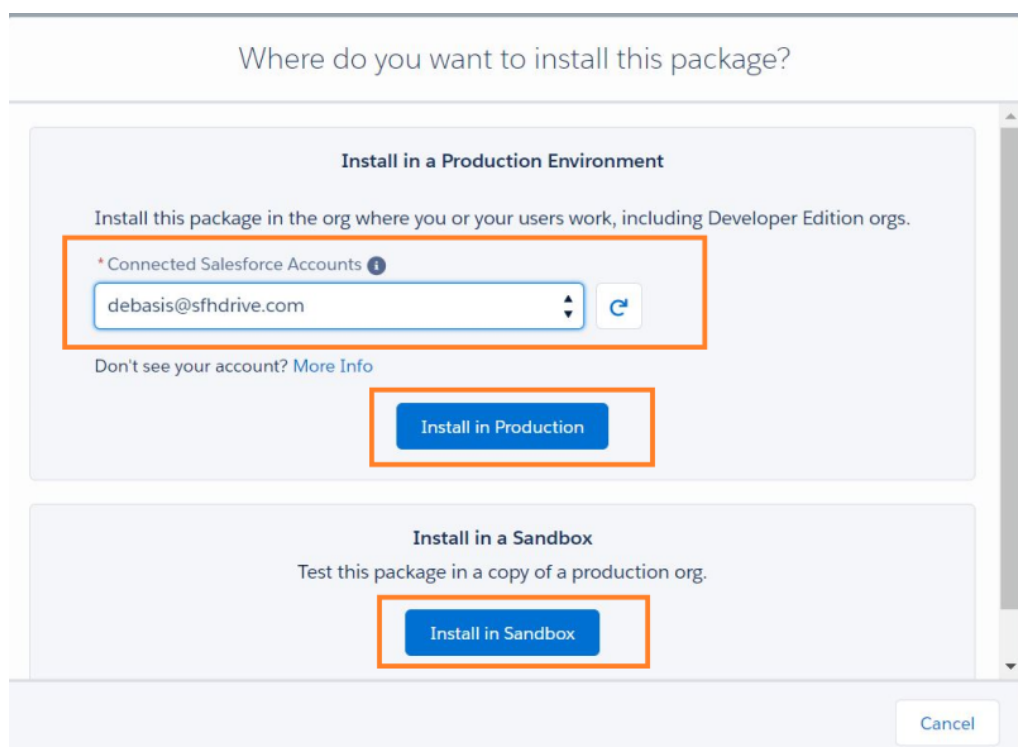
- Now click on **Get It Now** button to start the installation process

The screenshot shows the Salesforce AppExchange interface. At the top, there's a navigation bar with the Salesforce logo, 'AppExchange' text, and links for 'Home', 'Solutions by Type', 'Product Collections', 'Industry Collections', 'Consultants', 'Learn', and 'Latest Collections'. On the right, there are 'Sign Up' and 'Log In' buttons. Below the navigation bar is a search bar with the placeholder text 'Search AppExchange'. The main content area displays the 'Smart Field History Tracker' listing. It includes the app's icon, the name 'Smart Field History Tracker', the developer 'By CtrlF Systems FZE', the tagline 'One Place To Track All Your Field History', and 'No Ratings'. At the bottom of the listing, there's a section for 'Supported Features' with tags for 'Lightning Ready', 'Multiple Currencies', and 'Person Accounts'. To the right of this, it states 'Starting at \$1,000 USD/company/year' with a note that discounts are available for nonprofits and a link to 'Pricing Details'. On the far right, there is a prominent orange-bordered box containing a blue 'Get It Now' button and a 'More' dropdown menu.

Now click on **log in** to your trailblazer account to install the package. This will redirect you to Trailblazer account login page



After you login to your trailblazer account , you can choose your salesforce account(Production/Sandbox) where need to install the package



Now you can click on **Terms and Conditions agreement** and then click on **Confirm and Install** button to continue with your package installation. This might redirect you to the salesforce login page to install.

Confirm Installation Details

Here are the details we'll share from your profile

* First Name

Debasis

* Last Name

Jena

* Company

Dubai Multi Commodity Centre

* Country

United Arab Emirates

Job Title

State/Province

* Email

debasisjena.cet08@gmail.com

Phone

Edit Profile

☒ I have read and agree to the [terms and conditions](#).

Salesforce.com Inc. is not the provider of this application but has conducted a limited security review. [Learn More about the AppExchange Security Review.](#)

☒ Allow the provider to contact me by email, phone, or SMS about other products or services I might like

Cancel

Confirm and Install

We recommend it to select option **Install for All users** and click on **Install** Button to continue with package installation.

Install Smart Field History Tracker

By CtrlfSystems

☐ Install for Admins Only

☒ Install for All Users

☐ Install for Specific Profiles...

Install

Cancel

App Name	Publisher	Version Name	Version Number
Smart Field History Tracker	CtrlfSystems	Smart Field History Tracker	1.11

Description

Smart Field History Tracker is a field and record auditing tool to track an unlimited number of history of any type of field per object, be it Standard or Custom. This Smart Field History tracker is even capable of tracking the history of deleted records. Smart Field History Tracker does not consume Salesforce data or file storage to store history records. You can also run customizable report in history records to download or send over email to any user in the org.

Now you can see installation progress page as below

Install Smart Field History Tracker

By CtrlfSystems

Installing and granting access to all Users...

App Name	Publisher	Version Name	Version Number
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Smart Field History Tracker

CtrlfSystems

Smart Field History Tracker

1.11

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you can click **Done** button once installation completed

Install Smart Field History Tracker

By CtrlfSystems

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Installation Complete!

Done

App Name	Publisher	Version Name	Version Number
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Now you can verify , installation in salesforce Packager page.

Setup ->Apps->Packaging->Installed Package

Setup

Home

Object Manager

Quick Find

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

New Salesforce Mobile App QuickStart

Lightning Usage

Optimizer

ADMINISTRATION

> Users

> Data

> Email

PLATFORM TOOLS

Installed Packages

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the 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	Status	Allowed Licenses	Used Licenses	Enabled for Platform Integrations	Expiration
Uninstall Manage Licenses	Smart Field History Tracker	CtrlfSystems	1.11	smarthistory	Trial	Unlimited	0	☐	31/01/2022

Description

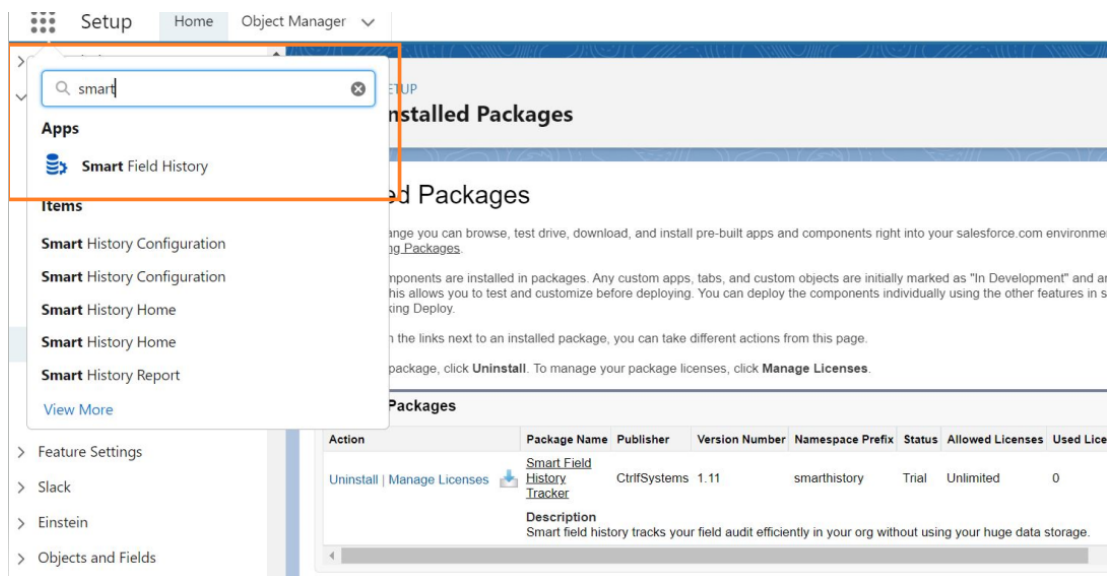
Smart field history tracks your field audit efficiently in your org without using your huge data storage.

Uninstalled Packages

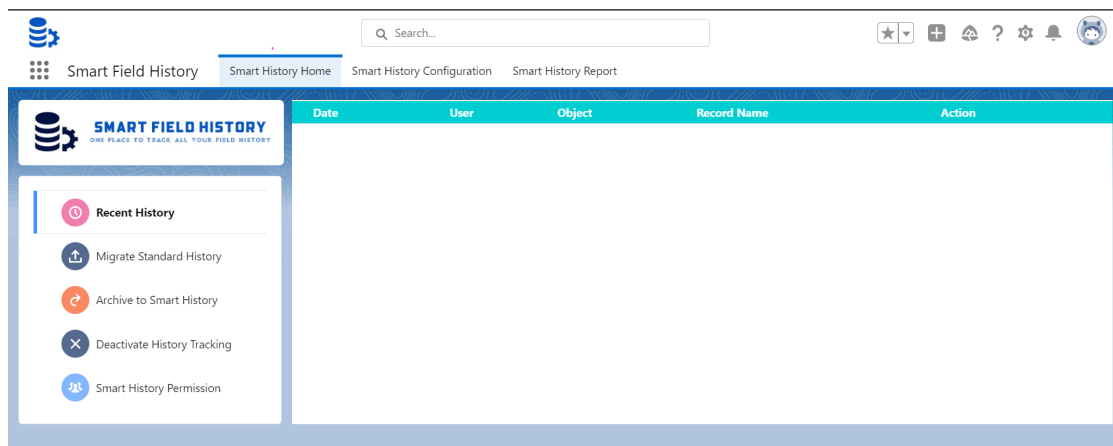
Application Setup And Configuration

You can access **Smart Field History Tracker** Application from App Launcher Menu

Search Setup



You can see Application tab as below - Smart History Home, Smart History Configuration, Smart History Report



Setup User, Profile and permissions for Smart Field History

While installing the Smart Field History application, we recommend to grant access for all users. If access not provided to all users, then we can provide to the users with multiple options

Permission sets

There are three different permission sets are available for the user

- **Smart History Admin**

Using salesforce permission set assignment, Assign this permission to the user whom you want to make as smart Field History Admin

- **Smart History Report**

Using salesforce permission set assignment, Assign this permission to the user whom you want to allow to run report on smart field history

- **Smart History User**

Using salesforce permission set assignment, Assign this permission to the user whom you want to allow to run report on smart field history

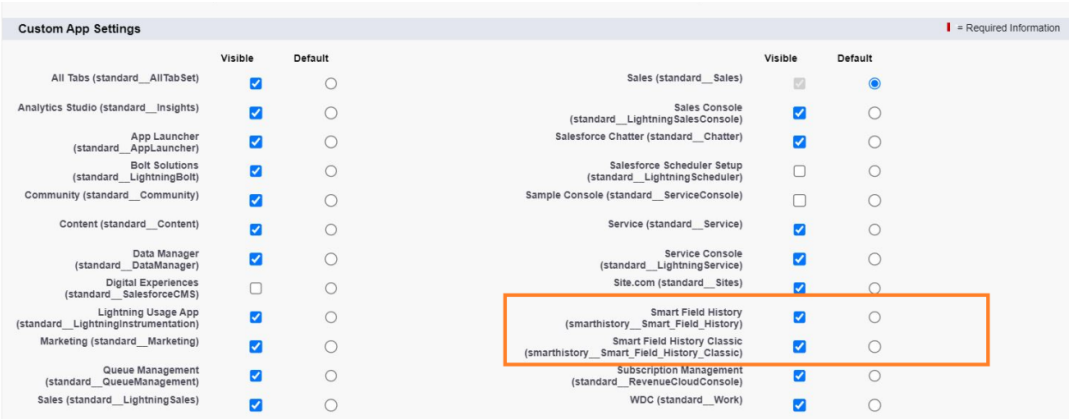
Profile Level changes

You can update users profile manually and provide access to the components as below

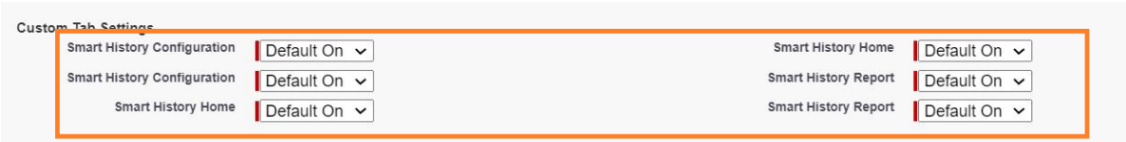
- Select the profile from setup → Profile →
- Enable Smart Field History Application Access

go to setup->Profile → select profile which you want to change and then click on Edit

now you can provide access to Smart Field History application in Custom App Setting



- Provide access to below custom tab



- Provide Object Permission as below , define your Object permission as per your security rules.

Custom Object Permissions						
	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Fields Tracker	☒	☒	☒	☐	☐	☐
Objects Tracker	☒	☒	☒	☐	☐	☐
Smart Fields History	☒	☒	☒	☐	☐	☐
Smart History Configuration	☒	☒	☒	☐	☐	☐
SmartHistory Log	☒	☒	☒	☐	☐	☐

Provide field level access

- Object Tracker - provide read access

Field Name	Field Type	Read Access	Edit Access
Activated By	Lookup	☒	☐
Activation Date Time	Date/Time	☒	☐
Created By	Lookup	☒	☐

Delete Track	Checkbox	☒	☐
Last Modified By	Lookup	☒	☐
Object Label	Text	☒	☐
Object Name	Text	☒	☒
Object Record Name Field	Text	☒	☐
Object Tracker No	Auto Number	☒	☐
Owner	Lookup	☒	☒
Status	Picklist	☒	☐

Save Cancel

• Field Tracker - Provide Read access

Edit Back to Profile			
Field Name	Field Type	Read Access	Edit Access
Activation Date Time	Date/Time	☒	☐
Created By	Lookup	☒	☐
Field API	Text	☒	☐
Field Data Type	Text	☒	☐
Field Name	Text	☒	☐
Field Tracker No	Auto Number	☒	☐
Last Modified By	Lookup	☒	☐
Object Tracker	Lookup	☒	☐
Owner	Lookup	☒	☒
Status	Picklist	☒	☐
Edit Back to Profile			

• Smart History Configuration - Provide read access

Field Name	Field Type	Read Access	Edit Access
Active	Checkbox	☒	☐
Archive Server URL	Text	☒	☐
Company Name	Text	☒	☐
Configuration Type	Picklist	☒	☐
Created By	Lookup	☒	☐
Email	Email	☒	☐
Existing History Migration Status	Picklist	☒	☐
First Name	Text	☒	☐
History Object Name	Text	☒	☐
History To BigObject Days	Number	☒	☐
Last Modified By	Lookup	☒	☐
Last Name	Text	☒	☐
Migrate Existing History	Checkbox	☒	☐
Migration Date Time	Date/Time	☒	☐
Migration Job Completed?	Checkbox	☒	☐
Owner	Lookup	☒	☒
Secret Key	Text	☒	☐
Smart Archive License	Text	☒	☐
Smart History Archive Days	Number	☒	☐
Smart History COnfiguration Name	Auto Number	☒	☐

• Smart Field History –Provide Read/Edit access

Created By	Lookup	☒	☐
Field API	Text	☒	☒
Field Data Type	Text	☒	☒
Field Label	Text	☒	☒
Field Tracker Id	Text	☒	☒
History Type	Picklist	☒	☒
isCreated	Checkbox	☒	☒
isDeleted	Checkbox	☒	☒
isUpdated	Checkbox	☒	☒
isValueChanged	Checkbox	☒	☒
Last Modified By	Lookup	☒	☐
Migrated History Id	Text	☒	☒
New Value	Rich Text Area	☒	☒
Object Label	Text	☒	☒
Object Name	Text	☒	☒
Object Record Id	Text	☒	☒
Object Record Name	Text	☒	☒
Object Tracker Id	Text	☒	☒
Owner	Lookup	☒	☒
Previous Value	Rich Text Area	☒	☒
Ready To Delete	Checkbox	☒	☒
Smart Field History No	Auto Number	☒	☐
Updated By Id	Text	☒	☒
Updated By Name	Text	☒	☒
Updated Date Time	Date/Time	☒	☒

• Smart History Log – Provide Read/Edit access

Field Name	Field Type	Read Access	Edit Access
Class Name	Text	☒	☒
Created By	Lookup	☒	☐
Error Stack	Long Text Area	☒	☒
Exception Timestamp	Date/Time	☒	☒
Last Modified By	Lookup	☒	☐
Message	Long Text Area	☒	☒
Owner	Lookup	☒	☒
SmartHistory Log	Auto Number	☒	☐

- Grant access to Apex class- Please provide access to all class with namespace as SmartHistory
- Grant access to visualforce page with namespace as smarthistory
- Enable below custom setting

Enabled Custom Setting Definitions Access		Edit
Custom Setting Definition Name	AppExchange Package Name	
Smart.Field.History.Tracker.smarthistory.Smart.History.Parameter	Smart.Field.History.Tracker	