



SMART FIELD HISTORY
ONE PLACE TO TRACK ALL YOUR FIELD HISTORY

Smart Field History Tracker

Admin and User Manual

Introduction

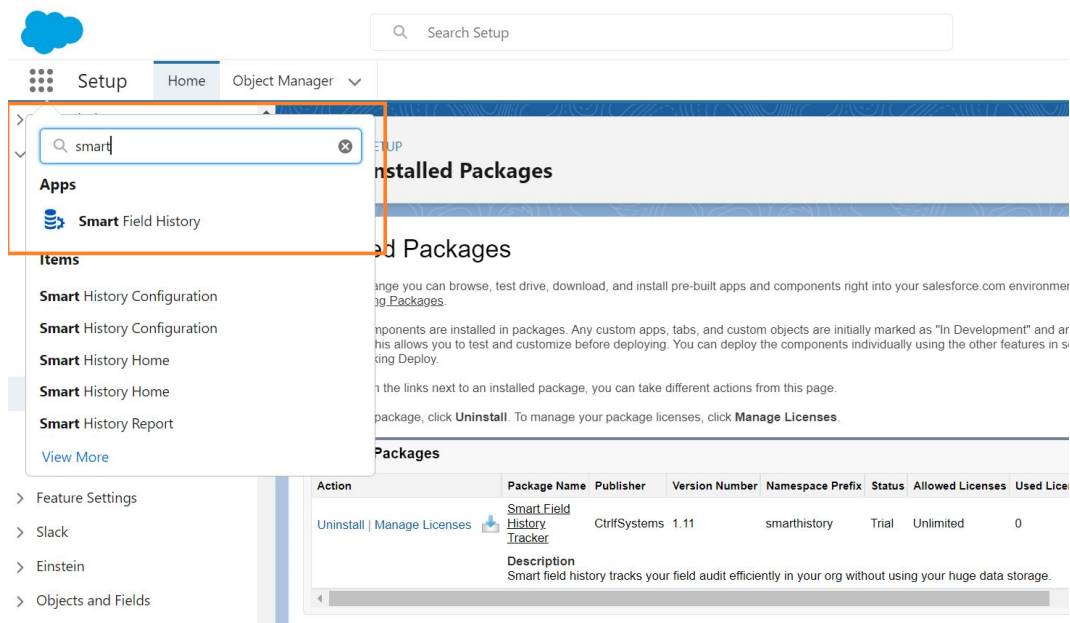
Smart Field History Tracker is a native Force.com Utility that helps salesforce Users to setup and view any object(standard/custom) record field history and record deletion history.

This tool helps you

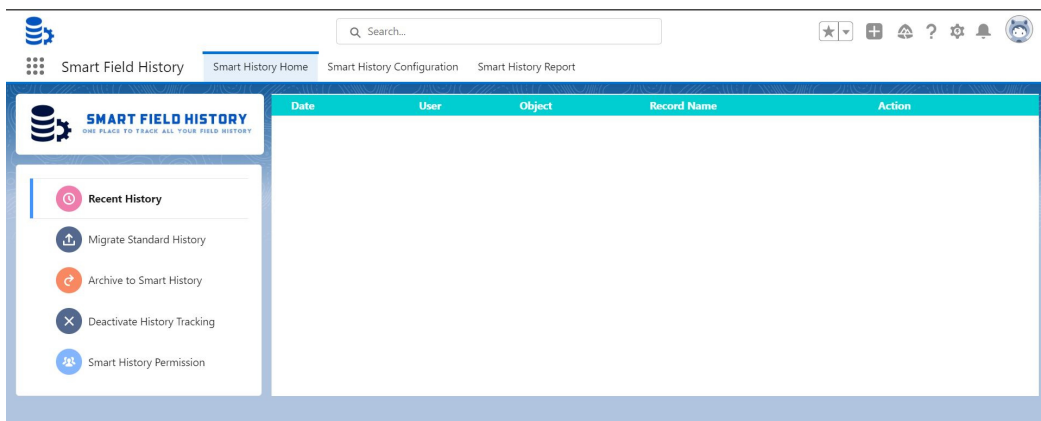
- Supports in both lightning experience and classic experience
- Supports both standard and custom objects
- Tracks field history for unlimited fields
- Tracks records delete history
- Allow users to send history report over the email as attached csv
- Allow users to download history information as csv
- Extensive filter on reporting to preview history record
 - Filter based on object name to view what are the updates on the object in a specified time
 - filter based on object and field names to view what are the updated on the object fields in a specified time
 - filter based on users to view what are the updates by the user in a specified time
- View history on record level on each record page (supports both in classic and lightning)
- View full Report to run on the history records
- Not using salesforce storage – archive history records to archival data storage of client choice
- History records can be archived to any local server
- History record can be archived to dedicated archival server provided by Smart Field History
- Able to backup all history which are tracked with help for salesforce field history .
- Easy activate/deactivate smart field history tracking in the org

Access Smart Field History Tracker Application

After installation of the package, please Go to your Salesforce App Launcher and search Smart Field History application



As admin, Now you can see there are three Tab/page in the application as Smart History Home, Smart History Configuration and Smart History Report

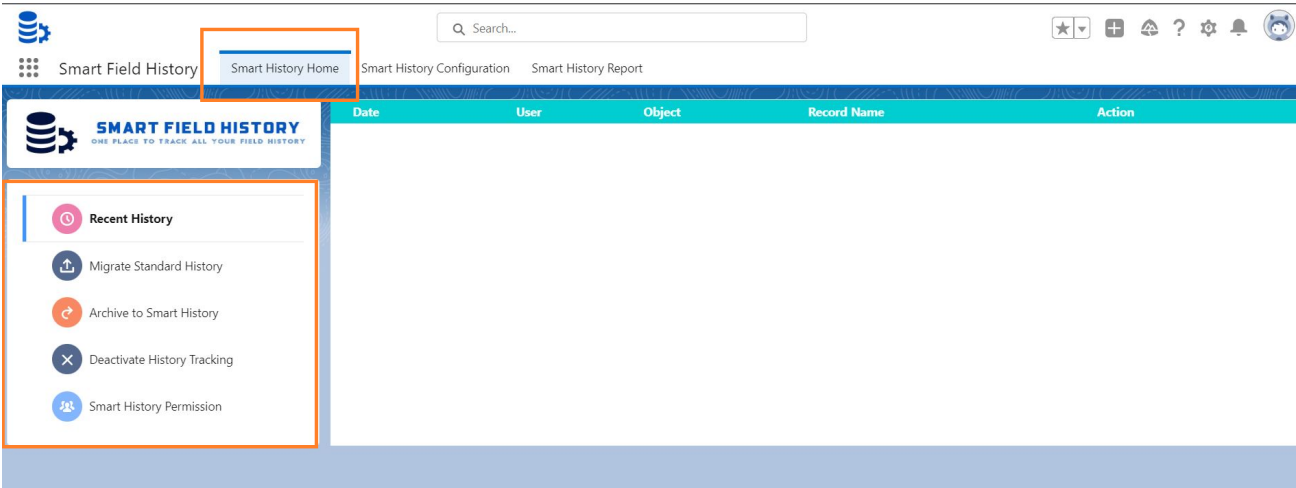


Page: Smart History Home

This page helps for initial setup of the Smart Field History tool where we have multiple items in left side bar

- Recent History
- Migrate Standard History
- Archive to Smart History
- Deactivate History Tracking

• Smart History Permission



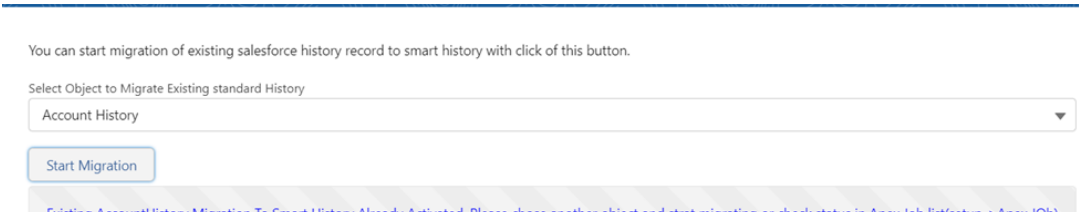
Recent History

When we click on Recent History item , we can see latest 500 history records as tabular format with columns as Date, User, Object, RecordName and Action

Date	User	Object	Record Name	Action
27/08/2022, 11:51 pm	Debasis Jena	Account	Debasis jena	ChangedAccount Ratingfrom Blank Value to Hot ChangedRating Formulafrom Formula value to HotFormula value ChangedAccount Namefrom debasis to Debasis jena
24/08/2022, 5:54 pm	Debasis Jena	Account	debasis	Record Created ChangedAccount Namefrom Blank Value to debasis ChangedRating Formulafrom Blank Value to Formula value ChangedAccount Enabledfrom Blank Value to false
24/08/2022, 5:42 pm	Debasis Jena	Account	Test account 23082025	ChangedArabic Namefrom Blank Value to asdfasafa ChangedParent Account IDfrom Test acc 5 (0018c00002SERBrAAP) to Salesforce code school1(0018c0000269xWCAAY) ChangedBilling Cityfrom Luande to Chessington KT9 2NS
24/08/2022, 1:47 am	Debasis Jena	Account	Test account 23082025	ChangedParent Account IDfrom Blank Value to Test acc 5(0018c00002SERBrAAP)
24/08/2022, 1:46 am	Debasis Jena	Account	Test account 23082025	ChangedParent Account IDfrom Salesforce code school1 (0018c0000269xWCAAY) to Blank Value ChangedParent Account IDfrom Test acc 5 (0018c00002SERBrAAP) to Salesforce code school1(0018c0000269xWCAAY)
24/08/2022, 1:39 am	Debasis Jena	Account	Test account 23082025	ChangedParent Account IDfrom 0018c00002SERBrAAP to 0018c0000269xWCAAY

Migrate Standard History

This option helps to migrate history records tracked in salesforce using salesforce field history feature. Here we show History object names in combo box and user can select one object at a time to migrate it to the smart history system.



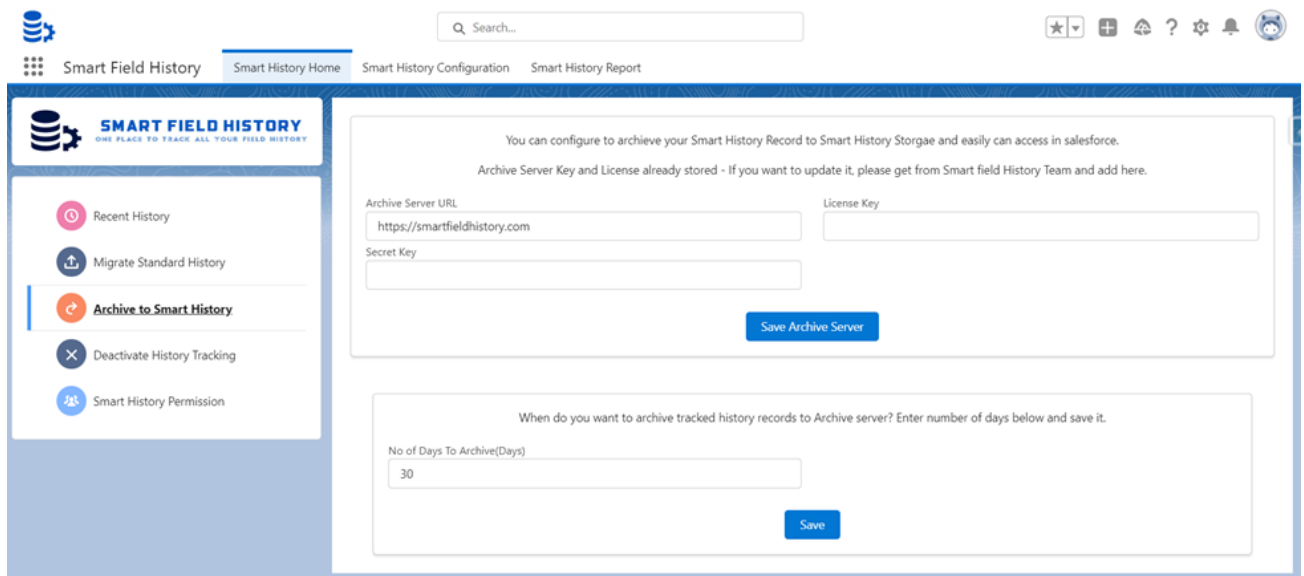
Archive to Smart History

Smart Field History archives history records to a dedicated VPS server and stores these history records forever.

Smart Field History team will Provide Sever URL, License Key, Secret Key over email to the client.

Client's Admin user can save Server Url, License Key, Secret Key in protected custom setting using below UI.

Also you can set archival period in below UI, set when do you want to archive tracked history records to archive server.



Deactivate History Tracking

Sometimes we might need to stop tracking -might be during bulk data upload – here we have provided option to click and deactivate history tracking at any time.

You can Deactivate history tracking by simply updating custom setting whenyou need. You can control this org wide or specific user level.

Go To **Setup** Search **Custom Settings** to find**Smart History Parameter** Custom setting.

Now you can manage **Default Organization Level Value** or for **User level** to set **Disable Field Tracking** in Custom setting.

☐ Deactivate Tracking

Save

Smart History Permission

Smart Field History is having three permission set which can be assigned to the user for easy use

- Smart History Admin
- Smart History user
- Smart History Report

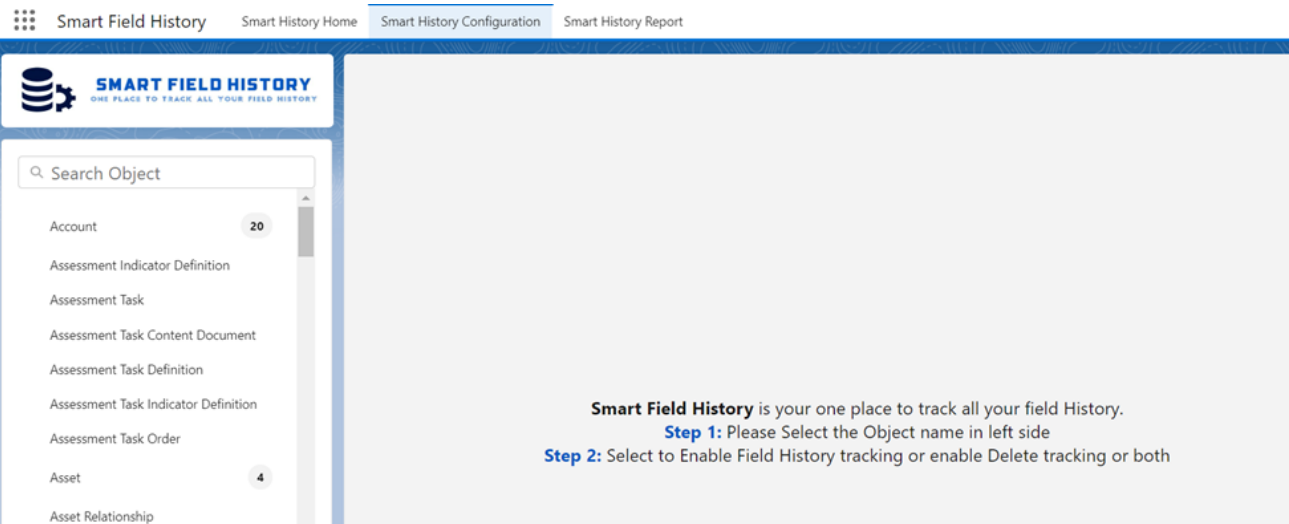
There are Two permissionset **Smart History Admin** , **Smart History User** and **Smart History Report**

Go To **User** And assign appropriate Permission **Smart History Admin** , **Smart History User** or **Smart History Report** to the user.

Page: Smart History Configuration

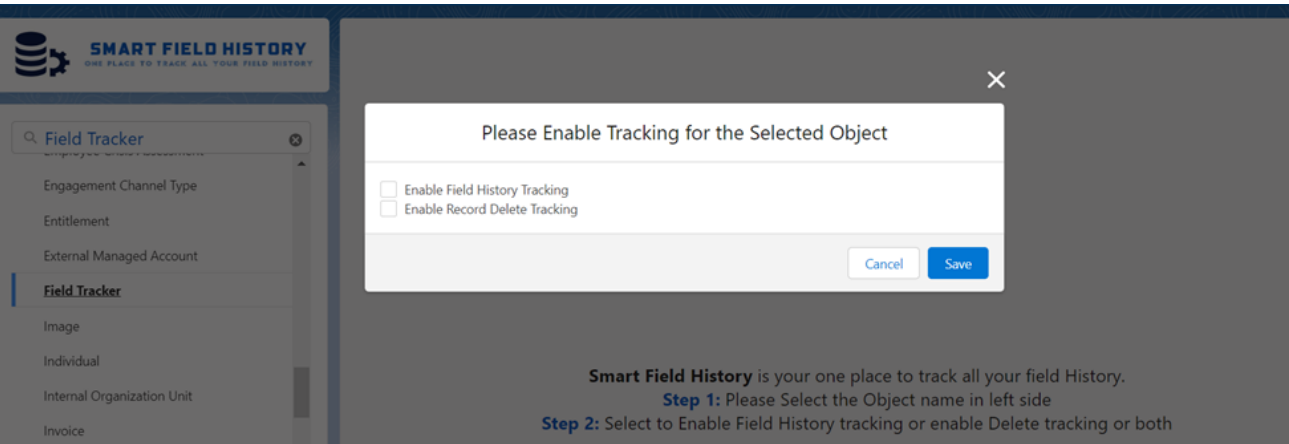
Smart Field history provides capabilities to configure your standard and custom object for which you want to track field changes or record deletion.

Here in left side select the object name which you want to track and this will provide you options to enable tracking for the object



Once you selected object then we can select below options

- Enable Field History tracking
- Enable Record Delete Tracking



Once object activated, now we can activate the field list for tracking.

Here you can select all field , or any field you wish to track and save it.



SMART FIELD HISTORY

ONE PLACE TO TRACK ALL YOUR FIELD HISTORY

Field Tracker

Field Tracker

Please Select Field In below and Save to activate history tracking

Search with Field Name

	NAME	API NAME	DATA TYPE
☐	Activation Date Time	Smarthistory_activation_date_time__c	DATETIME
☐	Field API	Smarthistory_field_api__c	STRING
☐	Field Data Type	Smarthistory_field_data_type__c	STRING
☐	Field Name	Smarthistory_field_name__c	STRING
☐	Field Tracker No	Name	STRING
☐	Object Tracker	Smarthistory_object_tracker__c	REFERENCE
☐	Owner ID	Ownerid	REFERENCE
☐	Status	Smarthistory_status__c	PICKLIST
☐	System Modstamp	Systemmodstamp	DATETIME

☒ Enable Field History Tracking

☐ Enable Record Delete Tracking

Save

Add/Update Object Trigger to enable tracking tracking

We invoke Smart Field History application logic from the object trigger. For which object you wish to activate Tracking, please add below logic in the Object Trigger After insert, After Update, After Delete.

Just add this below logic in your trigger

```
Smarthistory.SmartHistoryTrackerHandler sHandler = smarthistory. SmartHistoryTrackerHandler.getInstance();

sHandler.invokeSmartFieldHistory(trigger.newMap,trigger.oldMap);
```

Example:

```
trigger SHAccountTrigger on Account (After insert,After Update,After Delete) {

    SmartHistoryTrackerHandler sHandler = SmartHistoryTrackerHandler.getInstance();
    sHandler.invokeSmartFieldHistory(trigger.newMap,trigger.oldMap);
}
```

View Record History in Record Page

Easily we can view record level history in our lightning record page, and you can download history details form the same page too

Update Record Page to view History in lighting Experience

Update record page with adding below LWC component

Edit Page and add a Page tab

Account

Burlington Textiles Corp of America

+ Follow

New Contact

New Case

New Note

Type

Phone

Website

Account Owner

Account Site

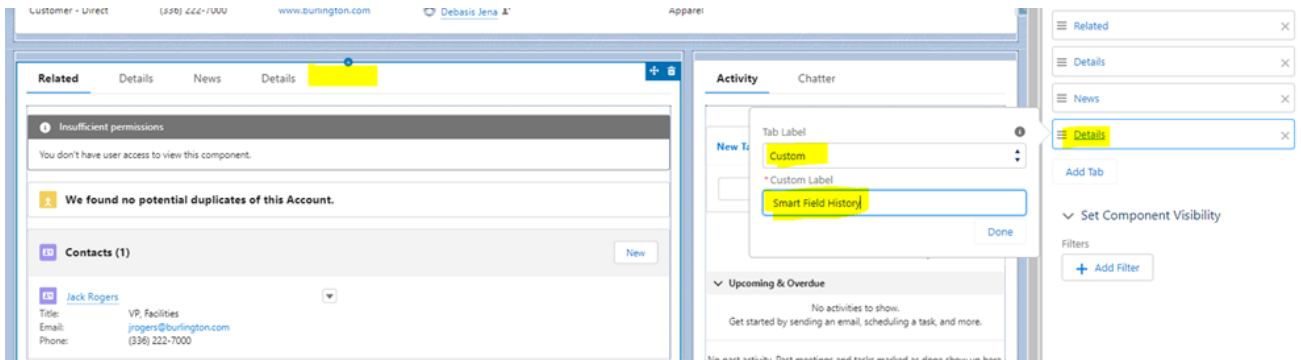
Industry

Page > Tabs

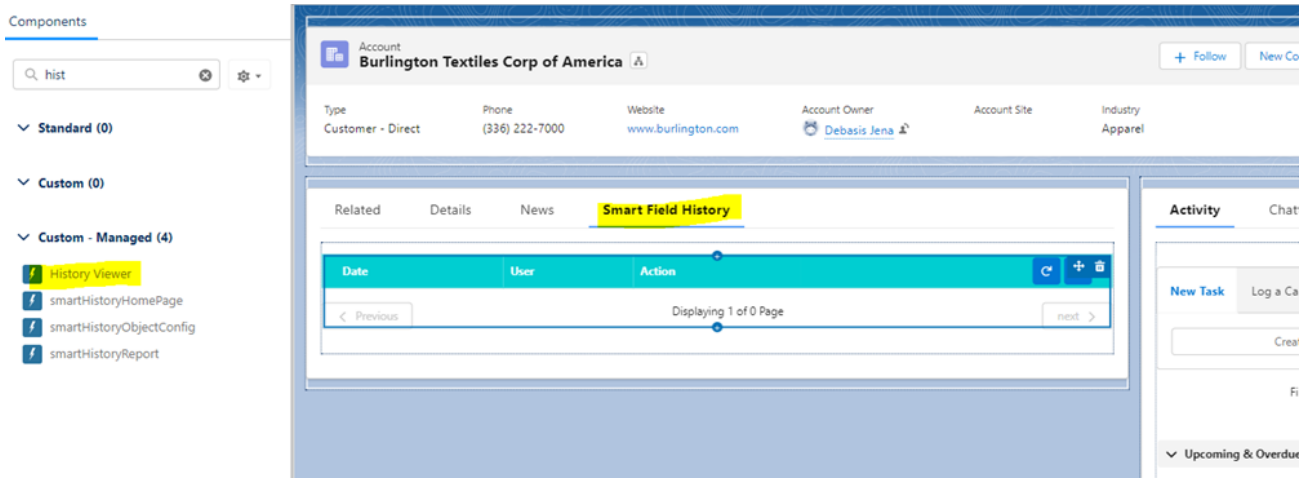
Default Tab

Related

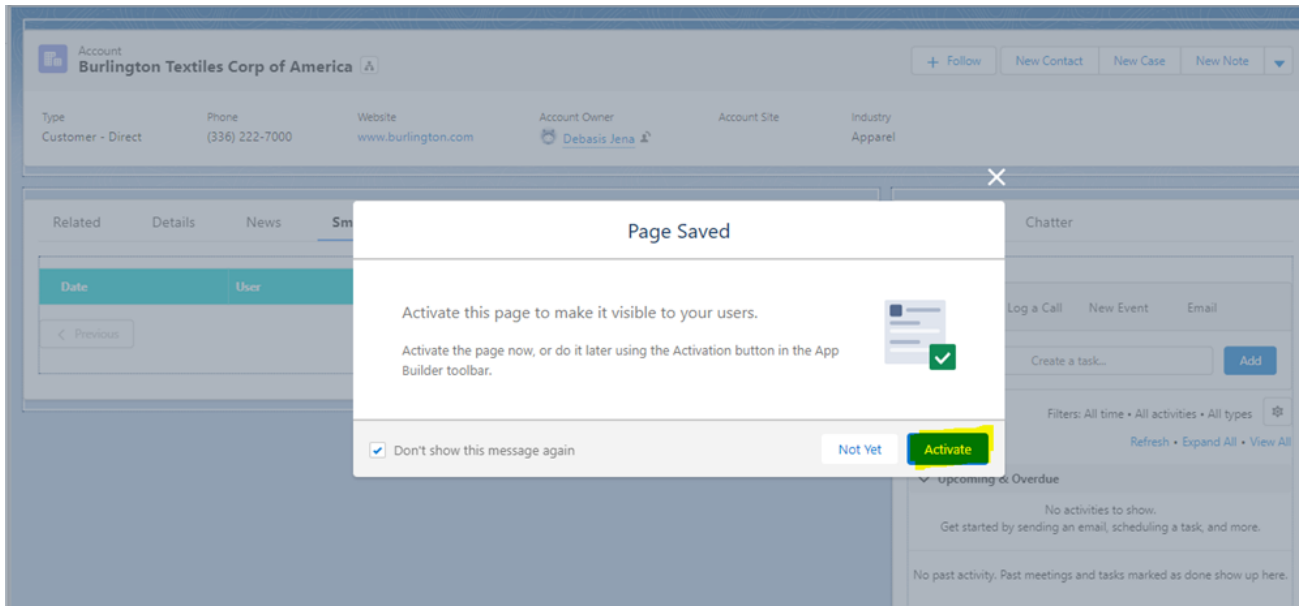
Tabs



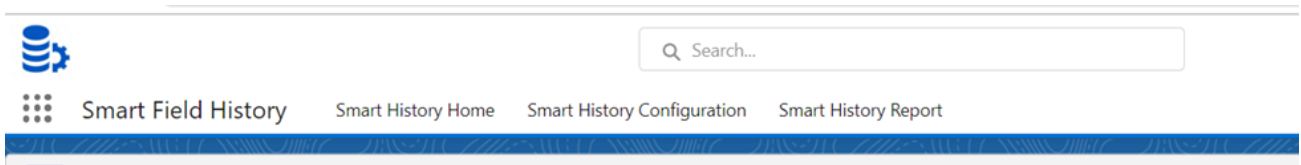
Under this page tab, add History Viewer component



Now you can activate and save the page



When you open the record, you can see History of the record as below now



Account

Debasis jena

Type

Phone

Website

Account Owner

Account Site

Industry

Debasis Jena

Related

Details

Smart Field History

Date	User	Action
27/08/2022, 11:51 pm	Debasis Jena	Changed Rating Formula from Formula value to HotFormula value Changed Account Name from debasis to Debasis jena Changed Account Rating from Blank Value to Hot
24/08/2022, 5:54 pm	Debasis Jena	Changed Account Enabled from Blank Value to false Changed Rating Formula from Blank Value to Formula value Changed Account Name from Blank Value to debasis Record Created

< Previous

Displaying 1 of 1 Page

next >

Update Record Page to view History in classic Experience

History record from record specific can be opened with help of a detail page button in salesforce classic experience.

Go to object ‘Button, Links, and Actions ’ and create a Detail Page button with Content Source as URL and Behavior as ‘Display in existing Window without sidebar’

Next Place URL as

```
https://YourDomainName/apex/SmartHistoryRecordViewerClassic?recordId={!RecordIDMergeField.Id}
```

Custom Button or Link Edit

Save Quick Save Preview Cancel

LabelSmart Field History

NameSmart_Field_History

Namespace Prefixsmarthistory

Description

Display Type

Detail Page Link View example

☒ Detail Page Button View example

List Button View example

BehaviorDisplay in existing window without sidebar or header View Behavior Options

Content SourceURL

Select Field TypeAccount

Insert Field-- Insert Merge Field --

Insert Operator

Functions

-- All Function Categories --

ABSACOSADDMONTHSAGEAGEONAND

Insert Selected Function

https://shdev-dev-ed--smarthistory.visualforce.com/apex/SmartHistoryRecordViewerClassic?recordId={!Account.Id}

Add this button in your [pagelayout](#) to see the button in details page to view history of the record.

Page: Smart History Report

Smart Field History provides capabilities to run report with multiple filter condition to review the history records in a single page.

Here we can filter reports based on object name, object & Field names, User and can provided timeline to filter the record.



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Smart Field History

Smart History Home

Smart History Configuration

Smart History Report

Search with Object Only

Search with Object & Field

Search with User Only

All Filters

Select Object

From Date

To Date

Search

Refresh

Records Per Page: 10

Search by any Column Value

Export

Page: 1 of 50

Object	Record Name	Operation	Date	Updated By	Field Name	Old Value	New Value	Description
Account	Burlington Textiles Corp of America Test	Record Updated	30/08/2022, 11:41 am	Debasis Jena	Account Description	Blank Value	asfddasf	Debasis Jena updated Account Description from...
Account	Burlington Textiles Corp of America Test	Record Updated	30/08/2022, 11:41 am	Debasis Jena	Desc(Text Area)	Blank Value	asdfafa	Debasis Jena updated Desc(Text Area) from Blank...
Account	Burlington Textiles Corp of America Test	Record Updated	30/08/2022, 11:41 am	Debasis Jena	Rating Formula	WarmFormula value	HotFormula value	Debasis Jena updated Rating Formula from...
Account	Burlington Textiles Corp of America Test	Record Updated	30/08/2022, 11:41 am	Debasis Jena	Account Rating	Warm	Hot	Debasis Jena updated Account Rating from Warm...
Account	Debasis jena	Record Updated	27/08/2022, 11:51 pm	Debasis Jena	Account Rating	Blank Value	Hot	Debasis Jena updated Account

Also in the report page, there is option provided to export the report as CSV or send through email too

Smart History Home

Object & Field

From Date

Send Email

To: debcet11@gmail.com X

Cc:

History report on 30Aug2022

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Hi Debasis,

Please find attached history report for your verification.

Thanks

Smart Field History

Scheduler to configure

We track log/Error in our smart history logger and we strongly recommend it to delete over the time.

Please configure scheduler to delete old log records which generated by Smart Field History application

Class Name: : SmartHistoryLoggerDeleteBatchScheduler

Schedule Apex

Schedule an Apex class that implements the 'Schedulable' interface to be automatically executed on a weekly or monthly interval.

Save

Cancel

Job Name

Smart History Log Delete

Apex Class

SmartHistoryLoggerDeleteBi

Schedule Apex Execution

Frequency

☒ Weekly

☐ Monthly

Start

11/09/2022

[11/09/2022]

End

11/10/2025

[11/09/2022]

Preferred Start Time

04:00

Recurs every week on

☒ Sunday

☒ Monday

☒ Tuesday

☒ Wednesday

☒ Thursday

☒ Friday

☒ Saturday

Exact start time will depend on job queue activity.

Save

Cancel

If you have configured Archival Server to archive the history record, then please configure below scheduler to run which will move archival record to archival server

Class Name: SmartHistoryArchiveBatchScheduler

Schedule Apex

Schedule an Apex class that implements the 'Schedulable' interface to be automatically executed on a weekly or monthly interval.

Save

Cancel

Job Name

Smart History Archive

Apex Class

SmartHistoryArchiveBatchSc

Schedule Apex Execution

Frequency

☒ Weekly

☐ Monthly

Start

End

Preferred Start Time

Recurs every week on

☒ Sunday

☒ Monday

☒ Tuesday

☒ Wednesday

☒ Thursday

Account Detail

Edit

Delete

Sharing

Include Offline

Manage External Account

Smart Field History

Account Owner	Debasis Jena [Change]	Rating	Hot
Account Name	Debasis jena [View Hierarchy]	Phone	
Parent Account		Fax	
Account Number		Website	
Account Site		Ticker Symbol	
Type		Ownership	
Industry		Employees	
Annual Revenue		SIC Code	
Account Enabled	☐		
Arabic Name			
Rating Formula	HotFormula value		
Billing Address		Shipping Address	2 Sheikh Zayed Rd Trade Centre 2 Dubai Other

This Smart Field History button redirects to record History page as this

Home	Chatter	Accounts	Contacts	Cases	Solutions	Reports	Dashboards	Objects Tracker	Fields Tracker	Smart Fields History	+
Date	User	Action									
27/08/2022, 11:51 pm	Debasis Jena	Changed Rating Formula from Formula value to HotFormula value Changed Account Name from debasis to Debasis jena Changed Account Rating from Blank Value to Hot	 								
24/08/2022, 5:54 pm	Debasis Jena	Changed Account Enabled from Blank Value to false Changed Rating Formula from Blank Value to Formula value Changed Account Name from Blank Value to debasis Record Created									
< Previous Displaying 1 of 1 Page next >											

How to Reach out Smart Field History Team?

Smart Field History Tracker is a field auditing tool built on top of Salesforce by CtrlF Systems (<https://ctrlfsystems.com/>) that enforces governance by tracking History data within Salesforce.

If there is any queries, we are always reachable at contact@ctrlfsystems.com .

Visit <https://smartfieldhistory.com/> to know more about our product

