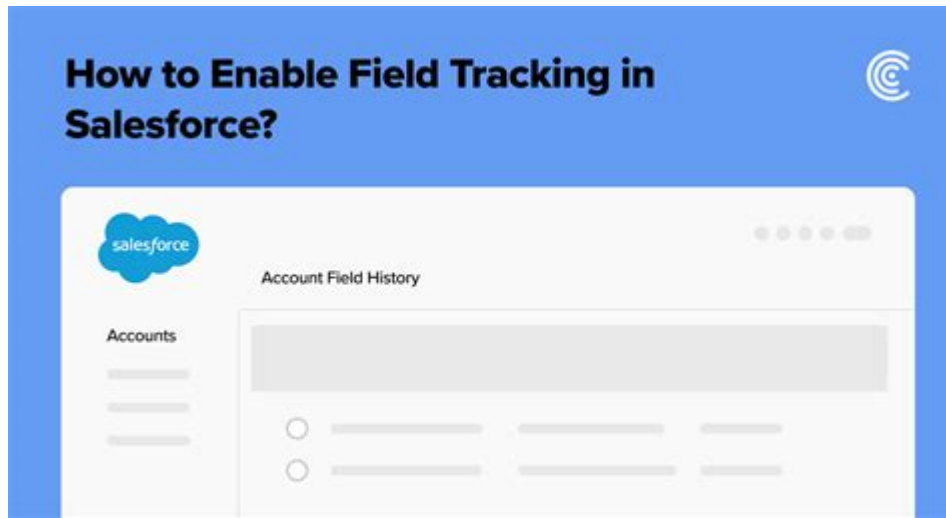# How To Enable Field History Tracking In Salesforce

How to enable field history tracking in Salesforce is a crucial step for organizations looking to maintain oversight of changes made to their records. Field History Tracking allows Salesforce users to track changes made to specific fields in their records, providing insights into data modifications over time. This capability is essential for audits, compliance, and operational improvements. In this article, we will explore the steps to enable field history tracking, its benefits, and best practices for using this feature effectively.

Understanding Field History Tracking in Salesforce

Field History Tracking is a native Salesforce feature that enables users to keep track of changes made to selected fields within standard and custom objects. By enabling this feature, you can monitor who made changes, what those changes were, and when they occurred. This historical data can be invaluable for various business processes, including compliance checks, performance evaluations, and error tracking.

Benefits of Field History Tracking

Enabling field history tracking in Salesforce provides a multitude of benefits, including:

- **Data Integrity:** Ensures that any changes to critical fields can be reviewed and audited.

- **Accountability:** Allows organizations to hold users accountable for changes made to records.

- **Enhanced Reporting:** Facilitates better reporting and analysis of trends over time.

- **Audit Trails:** Supports compliance with industry regulations by providing a detailed audit trail.

- **Improved Decision Making:** Access to historical data aids in making informed business decisions.

Steps to Enable Field History Tracking in Salesforce

Enabling field history tracking in Salesforce is a straightforward process. Follow these steps to activate this feature for your desired objects.

Step 1: Access Object Settings

1. Log in to your Salesforce account.
2. Click on the Setup icon (the gear icon) in the top right corner.
3. In the Quick Find box, type Object Manager and select it.
4. From the list of objects, choose the object for which you want to enable field history tracking (e.g., Account, Opportunity, Custom Object).

Step 2: Enable Field History Tracking

1. Once you are in the object settings, look for the Fields & Relationships section on the left sidebar.
2. Click on the Field History option.
3. Click on the Set History Tracking button.
4. In the pop-up window, check the box for Enable History Tracking.
5. You will see a list of fields available for tracking. Select the fields you want to track by checking the corresponding boxes.

Step 3: Save Your Changes

1. After selecting the fields you wish to track, click the Save button to apply your changes.
2. Once saved, you will see an overview of the fields you have enabled for tracking.

Step 4: Add the Field History Related List

To view the field history for your records, you need to add the Field History related list to the page layout.

1. Still in the Object Manager, navigate to Page Layouts.
2. Select the page layout you want to modify.
3. In the layout editor, find the Field History related list and drag it to the desired location on the layout.
4. Click Save to apply the changes.

Viewing Field History Data

After enabling field history tracking and adding the related list to your page layout, users can now view the historical changes made to the selected fields.

Accessing Field History

1. Navigate to a record of the object for which you enabled field history tracking.
2. Scroll down to the Field History related list.
3. Here, you will see a chronological list of changes, including the field name, old value, new value, user who made the change, and the date of the change.

Best Practices for Using Field History Tracking

While field history tracking is a powerful tool, following best practices will help you maximize its benefits.

1. Limit the Number of Tracked Fields

Tracking too many fields can lead to clutter and make it harder to find relevant information. Focus on tracking fields that are critical for your business processes.

2. Regularly Review Field History Data

Make it a habit to periodically review the field history data. This helps identify trends, discrepancies, or unauthorized changes, allowing you to take corrective actions if necessary.

3. Educate Users

Ensure that all users understand the importance of field history tracking. Provide training on how to access and interpret the field history data, so they can utilize it effectively in their roles.

4. Leverage Reports and Dashboards

Consider creating reports and dashboards that visualize field history data. This can help in identifying patterns over time and can be valuable for management reviews.

Conclusion

In summary, knowing **how to enable field history tracking in Salesforce** is vital for organizations looking to maintain data integrity and accountability. By following the steps outlined in this article, you can easily enable this feature, allowing your team to track changes over time effectively. With the right practices in place, field history tracking can significantly enhance your organization's ability to manage and audit data changes, ultimately leading to more informed decision-making and improved operational efficiency.

Frequently Asked Questions

What is field history tracking in Salesforce?

Field history tracking in Salesforce allows you to track changes made to specific fields on an object. It records the old and new values of the fields, as well as the date of the change and the user who made the change.

How can I enable field history tracking for a Salesforce object?

To enable field history tracking for a Salesforce object, go to Setup, click on the Object Manager, select the desired object, and then click on 'Fields & Relationships'. From there, click 'Set History Tracking', enable 'Track Field History', and select the fields you want to track.

Are there any limitations to field history tracking in Salesforce?

Yes, there are limitations. Salesforce allows you to track a maximum of 20 fields per object, and the history records are retained for 18 months in the standard history tracking. After that, older records are deleted.

Can I report on field history tracking in Salesforce?

Yes, you can report on field history tracking. Salesforce creates a related list called 'Field History' on the object record, and you can also create custom reports using the 'Field History' object to analyze changes over time.

Is field history tracking available for all objects in Salesforce?

Field history tracking is available for most standard and custom objects in Salesforce, but there are some exceptions. Certain objects, like the User object, do not support field history tracking.

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