

RECORD PRESENCE: WHO'S ON MY RECORD?



Give your Salesforce users real-time visibility into who's working on a record—right now, and historically.

WHAT IS RECORD PRESENCE?

Record Presence is a Salesforce Lightning component that displays who is currently viewing, editing, or has recently accessed a record. This visibility enhances collaboration, minimizes data conflicts, and adds transparency to your Salesforce experience.



Key Features

Users Viewing This Record

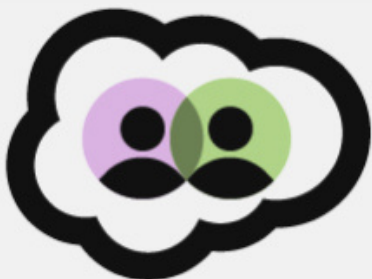
Shows real-time activity of users on a record:

- **Open** – user has the record tab open
- **View** – user has scrolled down a record
- **Update** – user has saved changes

Record Viewing History

Shows data on who accessed a record over a set time:

- Number of views per user
- Most recent view timestamp
- Admin-controlled data retention period



Smart Visibility Options

- **Photos, status bullets, halos** for easy user ID
- Color indicators for **active**, **idle**, and **timed-out** states
- Status disappears after 10 minutes of inactivity

RECORD PRESENCE: WHO'S ON MY RECORD?

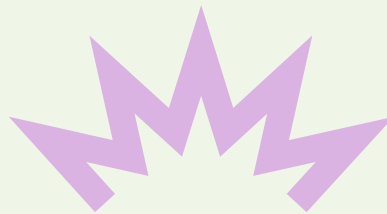


Admin Customization

Admins can configure:

- **Polling interval** for real-time updates (1–3 seconds recommended)
- **Idle time thresholds**
- **Custom colors** for statuses and names
- **Data retention rules** (rolling window or permanent)

See engagement trends



**Increase
collaboration**



**Avoid record conflicts &
Improve data transparency**

Brought to you by **Artichoke Apps LLC**

For more info or support, contact your Salesforce admin or visit our website at artichokeconsultingllc.com