

Customized Timeline Process - Quick Installation Guide

1. Install app: **Asynchronous Process Manager / Creator**.

In the installation process, select the option **Install for Specific Profiles...** provide **Full Access** for admin/high level profiles, and **Async Standard User** for the other profiles.

<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3u00000PuKbREAV>



Install Asynchronous Process Manager Creator

By



☐ **Install for Admins Only**



☐ **Install for All Users**



☒ **Install for Specific Profiles...**

Install

Cancel

Select Specific Profiles

These security settings determine access to the custom objects and components installed in the package. It doesn't affect permissions for existing objects.



Standard profiles (including the Read-Only profile) don't receive access to any installed custom objects. Because permissions are not editable for standard profiles, you must clone your profile to grant access.

Set access level for all profiles to

Full Access

Set

Profile	Access Level
System Administrator	Full Access (Your profile must have full access to the package)
CSM ROW	Async Standard User
CU Read Only	Async Standard User
Channel Manager	Async Standard User
Channel Manager old	Async Standard User

2. Install app: **Customize Timeline/Milestone Process**

In the installation process, select the option **Install for Specific Profiles...** provide **Full Access** for profiles that should be able to configure Timeline Process, and **Timeline Standard User** for the other profiles.

<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3u00000PtwxTEAR>



Install Customize Timeline Process

By Timeline Process Package



☐ **Install for Admins Only**



☐ **Install for All Users**



☒ **Install for Specific Profiles...**

Select Specific Profiles

These security settings determine access to the custom objects and components installed in the package. It doesn't affect permissions for existing objects.



Standard profiles (including the Read-Only profile) don't receive access to any installed custom objects. Because permissions are not editable for standard profiles, you must clone your profile to grant access.

Set access level for all profiles to

Full Access

Set

Profile	Access Level
System Administrator	Full Access (Your profile must have full access to the package)
Standard User	Timeline Standard User
Solution Manager	Timeline Standard User
Marketing User	Timeline Standard User
Contract Manager	Timeline Standard User
...	...

3. After installation go to tab **Asynchronous Manager**
 - 3.1 From the buttons menu, click the button: **Start Scheduler**
 - 3.2 From the button menu, click the button **Manage Triggers**.
 - 3.3 Using the drop-down select object that you want to work with and click the button **Deploy**
4. (Optional) In order to view the markers in the record page - Edit the relevant object that you choose during step 3.2 lightning record page and add the manage component **Record Markers View**