



StageLogic Package Technical Documentation

Cloud Partners

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1. Package Overview

- **Package Name:** Path.io - Stage History
- **Version:** 1.0 (Managed Released)
- **Package Type:** Second-Generation Managed Package (2GP)
- **Namespace:** path_io
- **API Version:** 65.0
- **Architecture:** 100% Declarative (No Apex Code).

2. Data Model

The package utilizes a single custom object to track historical changes to the Stage/Status of Cases, Leads and/or Opportunities

- **Object:** path_io__Stage_History__c
 - **Purpose:** Stores a historical log of stage changes for standard objects (Opportunity, Lead, Case).
 - **Key Fields:**
 - Case, Lead, and Opportunity - Lookup
 - Is Current Stage? - Checkbox
 - Time Entered - Date/Time
 - Time Exited - Date/Time
 - Stage Number - Number
 - Duration (Hours) - Formula
 - Duration (Days) - Formula

3. Automation (Flows)

The package's logic is handled entirely by **Record-Triggered Flows**. These flows automatically generate Stage History records when key status fields change.



Flow API Name	Trigger Context	Description
Path_io_Opportunity_Stage_History_On_Create	Record Create	Logs initial stage when an Opportunity is created.
Path_io_Opportunity_Stage_History_On_Update	Record Update	Logs changes when an Opportunity's Stage is modified.
Path_io_Lead_Stage_History_On_Create	Record Create	Logs initial status when a Lead is created.
Path_io_Lead_Stage_History_On_Update	Record Update	Logs changes when a Lead's Status is modified.
Path_io_Case_Stage_History_On_Create	Record Create	Logs initial status when a Case is created.
Path_io_Case_Stage_History_On_Update	Record Update	Logs changes when a Case's Status is modified.
Path_io_Stage_History_Setup_Configuration	Screen Flow	Utility flow for initial app configuration (Setup Assistant).



4. User Interface

The user experience is delivered through a dedicated App and specialized Lightning Pages.

- **Application:** Stage_History_HQ_Pathio
 - A standard Lightning App containing a “Home” and “Dashboard” tab.
- **Tabs:**
 - **Home:** A custom home page displaying the setup screen flow
 - **Dashboard:** A Custom Tab displaying the [Path.io Stage History Dashboard](#).

5. Security & Access

Access to the package components is controlled via two included Permission Sets:

- **Path.io - Stage History Admin:** Grants Modify All access to records on the path_io_Stage_History__c object
- **Path.io - Stage History User:** Grants Read and View All access to records on the path_io_Stage_History__c object

6. External Dependencies

- **Apex:** None (0 lines of code).
- **LWC/Aura:** None.