

Activity Timeline Administrator Guide

Version 1.0
October 2025



Developed by MS² Technologies

For Salesforce Users

Salesforce API Version: 58.0+

Compatible With: Lightning Experience

© 2025 MS² Technologies - All Rights Reserved

This document is proprietary and confidential. No part of this document may be reproduced, distributed, or transmitted in any form without prior written permission from MS² Technologies.

Contact Information

Developer: MS² Technologies
Support Email: contact@ms2tech.fr

Document Purpose

This User Guide offers comprehensive guidance on how to use the Activity Timeline application within Salesforce. It is designed for Salesforce end users to help them manage and track their activities effectively.



Activity Timeline

About MS² Technologies

MS² Technologies is a leading Salesforce ISV partner specializing in productivity and visualization solutions for the Salesforce platform. The Activity Timeline application represents our commitment to helping organizations gain better visibility into their customer interactions and business processes through innovative, user-friendly solutions.

Table of content

1. Introduction	5
1.1 About This Guide	5
1.2 ActivityTimeline Overview	5
1.3 Key Features	6
Core Capabilities	6
1.4 Technical Architecture	10
Technology Stack	11
Data Model	11
Security Model	12
1.5 System Requirements	12
2. Getting Started	12
2.1 Pre-Installation Checklist	12
2.2 Installation Overview	13
3. Installation	14
3.1 Installation Steps	14
3.2 Verify Installation	15
3.3 Troubleshooting	16
4. Configuration	16
4.1 Configuration Overview	16
4.2 Accessing Configuration	16
4.3 Creating Your First Timeline Configuration	17
Step 1: Start Configuration Wizard	17
Step 2: Select Primary Object	17
Step 3: Select Related Objects	17
Step 4: Configure Field Mappings	18
Step 5: Review and Save	19
4.4 Managing Configurations	19
Editing Existing Configurations	19
Deleting Configurations	20
4.5 Configuration Best Practices	21
5. Deployment	21
5.1 Adding Timeline to Lightning Pages	21
Step 1: Open Lightning App Builder	21
Step 2: Add Timeline Component	22
Step 3: Activate Page	23
Step 6: Save and Test	23
5.2 Training End Users	24
Quick Start Guide	24
Power User Training	24

Administrator Training	25
6. User Management	25
Assigning Permission Sets	25
Permission Set Contents	26
7. Security & Permissions	26
7.1 Permission Model	26
7.2 Data Security	27
Security Checks	27
Sensitive Data Handling	27
8. Maintenance & Optimization	28
8.1 Performance Monitoring	28
8.2 Optimization Recommendations	28
9. Troubleshooting	29
9.1 Common Issues and Solutions	29
Issue: Timeline Not Displaying	29
Issue: No Records Showing	29
Issue: Slow Performance	30
Issue: Permission Errors	31
9.2 Debug Logging	32
Enabling Logs	32
Verification Points	32
9.3 Support Resources	33
Self-Service Resources	33
Contacting Support	33
10. Best Practices Summary	34
Configuration Best Practices	34
Deployment Best Practices	35
Performance Best Practices	35
Security Best Practices	35
Glossary	36
Contact & Support	37

1. Introduction

1.1 About This Guide

This Administrator Guide provides comprehensive guidance for installing, configuring, and maintaining the **Activity Timeline** application for Salesforce, developed by **MS² Technologies**. This guide is specifically designed for:

- Salesforce System Administrators
- Salesforce Administrators
- Technical Configuration Specialists
- Implementation Consultants
- DevOps Teams

1.2 ActivityTimeline Overview



Activity Timeline is a powerful Lightning Web Component that provides a comprehensive, chronological view of all activities and interactions related to any Salesforce record. It transforms disparate data from multiple objects into a unified, easy-to-navigate timeline interface.

What Makes Activity Timeline Unique:

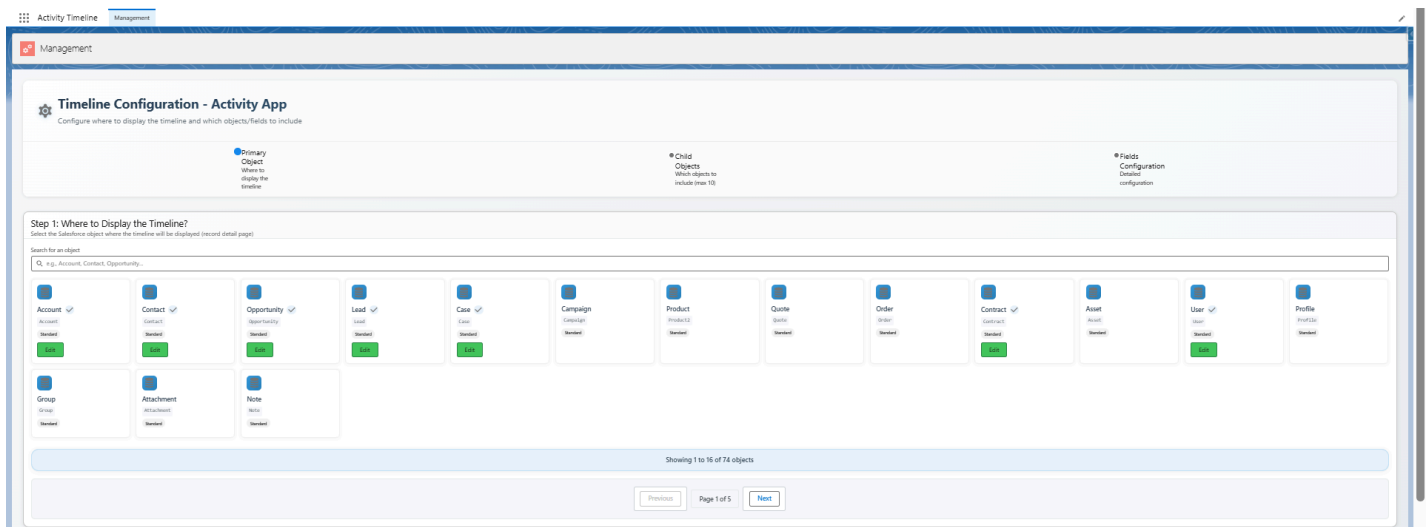
- **Universal Compatibility** - Works with any standard or custom object
- **Dynamic Configuration** - No-code setup for administrators
- **Visual Clarity** - Intuitive icons, colors, and grouping
- **High Performance** - Optimized queries and lazy loading
- **Flexible Display** - Multiple view options and filters

Business Value:

- Improve customer visibility with complete interaction history
- Enhance productivity by reducing search time
- Enable better collaboration across teams
- Support data-driven decisions with historical patterns
- Maintain compliance with complete audit trails
- Accelerate onboarding with accessible account history
- Deliver superior customer service with immediate context

1.3 Key Features

Core Capabilities



1. Dynamic Timeline Display

- Chronological organization with automatic sorting
- Smart grouping by day, week, or month
- Expandable sections for better navigation
- Clear visual hierarchy

Sales Console Opportunities salesforce.com - 500 ...

SFES00/SFG500

+ Follow Clone with Related Edit Edit Labels

Business Case
Daily Business

Sales Center
SC Germany

Primary Contact
Robin Sonnek

Responsible
Wolfgang Fischer

Business Account Name
Global Media

Stage: Closed Won Change Closed Stage

Activity Details Chatter **Activity Timeline**

Activity Timeline
for salesforce.com - 500 Widgets(Opportunity)

Show Filters Expand All Collapse All

Upcoming & Overdue
13 items requiring attention

Oct • 2025
Yesterday 53

Sep • 2025
5 weeks ago 2

2. Multi-Object Support

- Standard activities: Task, Event, Email, Call
- Business objects: Opportunity, Case, Contract, Order, Quote,...
- Custom objects with lookup/master-detail relationships

Activity Timeline
for salesforce.com - 500 Widgets(Opportunity)

Hide Filters Expand All Collapse All

Search
Search in all fields...

Search by Owner
Enter owner name to filter activities...

Date Range
All Time

Sort upcoming & overdue activities
Newest dates first

ACTIVITY TYPE

☒ All types

☐ Email

☐ Events

☐ List email

☐ Logged calls

☐ Tasks

Object Type

All

Custom Filter

Select an object type first to use custom filters

Call

Case

Email Sent

Event

PCN

13

3. Advanced Filtering

- Time-based: Last 7/30 days, Next 7 days, 1-5 years ago, All time
- Type filters: Multiple object type selection
- Status filters: Object-specific statuses
- Owner filters: By record owner or specific user

**Activity Timeline**
for salesforce.com - 500 Widgets(Opportunity)



Hide Filters

Expand All

Collapse All

Search

Search in all fields...

Search by Owner

Enter owner name to filter activities...

Date Range

All Time

Sort upcoming & overdue activities

Newest dates first

ACTIVITY TYPE

☒ All types

☐ Email

☐ Events

☐ List email

☐ Logged calls

☐ Tasks

Object Type

All

Custom Filter

Select an object type first to use custom filters

Clear Filters

**Activity Timeline**
for salesforce.com - 500 Widgets(Opportunity)



Hide Filters

Expand All

Collapse All

Search

Search in all fields...

Search by Owner

Enter owner name to filter activities...

Date Range

All Time

Sort upcoming & overdue activities

Newest dates first

ACTIVITY TYPE

☒ All types

☐ Email

☐ Events

☐ List email

☐ Logged calls

☐ Tasks

Object Type

Case

Custom Filter

Field

Closed Date

Operator

equals

Value

Date

31 Oct 2025

Time

00:00

Apply Filter

Clear Filters

4. Visual Customization

- Custom icons from Salesforce library or SVG upload
- Configurable display fields (up to 7 per object)
- Conditional record display

5. Search & Navigation

- Full-text search across visible fields
- Instant results with term highlighting
- Direct links to related records
- Keyboard shortcuts for efficiency

**Activity Timeline**
for salesforce.com - 500 Widgets(Opportunity)



Hide Filters

Expand All

Collapse All

Search

Search in all fields...

Search by Owner

Enter owner name to filter activities...

Date Range

All Time

Sort upcoming & overdue activities

Newest dates first

ACTIVITY TYPE

☒ All types

☐ Email

☐ Events

☐ List email

☐ Logged calls

☐ Tasks

Object Type

All

Custom Filter

Select an object type first to use custom filters

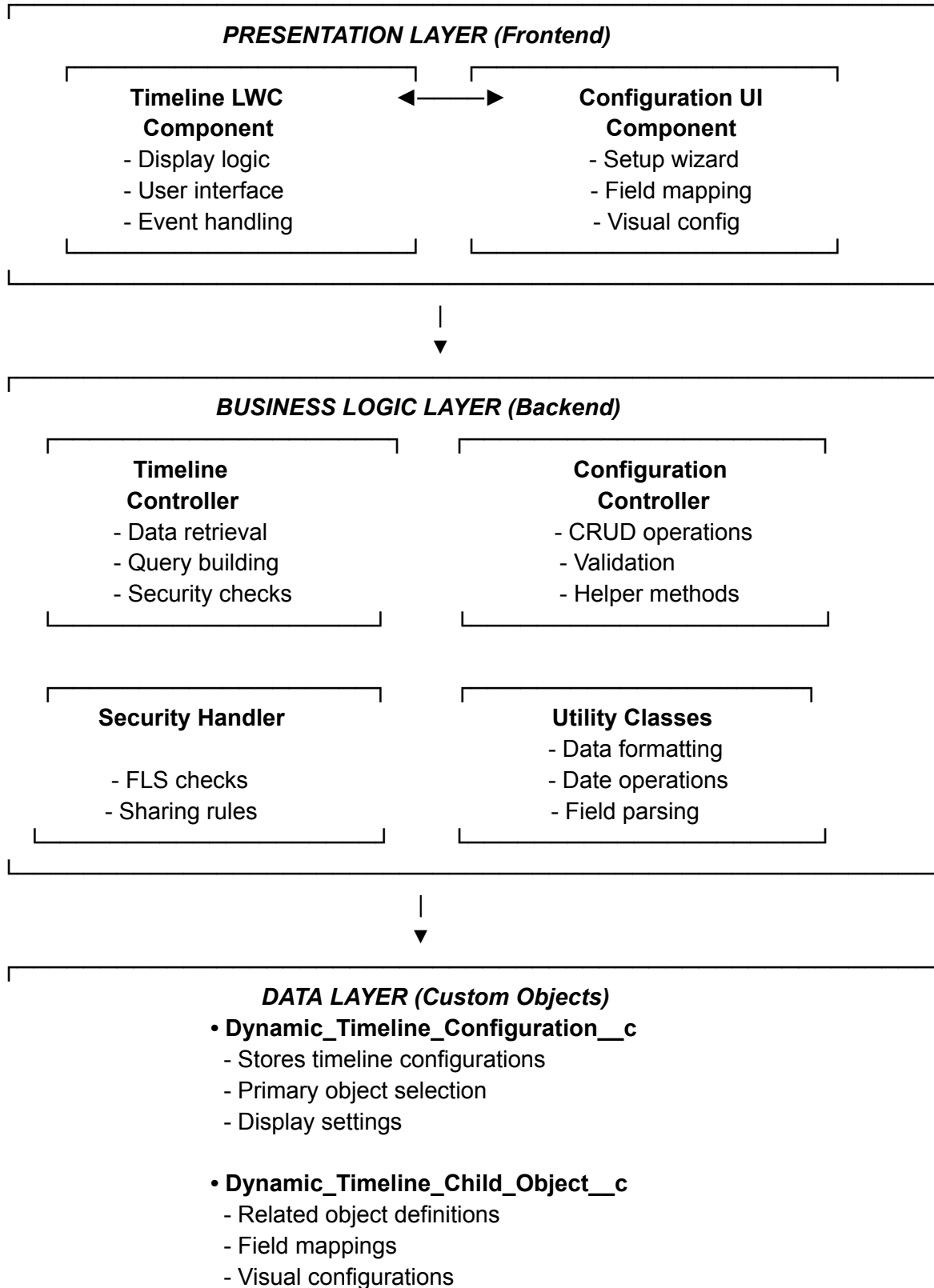
Clear Filters

6. Performance Features

- Smooth scrolling
- Smart client-side caching
- Optimized SOQL queries
- Governor limit compliance

1.4 Technical Architecture

The Activity Timeline application follows a modern, three-tier architecture:



- **Timeline_Temp_Config__c**
 - Temporary configuration storage
 - Draft configurations
 - Wizard state management



SALESFORCE STANDARD OBJECTS

- Task, Event, EmailMessage, Call
- Opportunity, Case, Contract, Order, Quote,...
- Custom Objects (user-defined)

Technology Stack

Frontend:

- Lightning Web Components (LWC)
- Lightning Design System (SLDS)
- JavaScript ES6+
- HTML5 / CSS3
- Lightning Message Service

Backend:

- Apex (v58.0+)
- SOQL
- Custom Objects
- Platform Events (optional)

Data Model

1. Dynamic_Timeline_Configuration__c

- Stores main timeline configuration settings
- Key fields: Name, Primary_Object__c, Description__c, Default filters, Sorting, Grouping
- Master to Child Object configurations

2. Dynamic_Timeline_Child_Object__c

- Defines related objects and field mappings
- Key fields: Object API Name, Relationship Field, Title/Date/Status Fields, Icon, Color
- Master-Detail to Configuration object

3. Timeline_Temp_Config__c

- Temporary storage during configuration wizard
- Key fields: User__c, Session_Id__c, Step_Number__c, Configuration_Data__c
- Auto-cleanup after expiration

Security Model

- **Object-Level:** Controlled via Permission Sets and sharing rules
- **Field-Level:** Respects all FLS settings; hidden fields never displayed
- **Record-Level:** Honors org-wide defaults, role hierarchy, and sharing rules

1.5 System Requirements

Technical Requirements:

- Salesforce Edition: Enterprise, Unlimited, Performance, or Developer
- Lightning Experience enabled
- API Version: 58.0 or higher
- Active user licenses

Permission Requirements:

For Installation:

- System Administrator profile OR
- Modify All Data + Customize Application + API Enabled + Manage Profiles/Permission Sets

For Configuration:

- Timeline Admin permission set
- Custom object CRUD permissions
- Lightning Page editing rights

For End Users:

- Timeline User permission set
- Appropriate object and field read permissions

2. Getting Started

2.1 Pre-Installation Checklist

Before installing Activity Timeline, complete these steps:

1. Environment Preparation

- Confirm Salesforce edition compatibility
- Verify Lightning Experience is enabled
- Check available storage space
- Review current API usage

2. User Readiness

- Identify admin users for configuration
- Determine end-user groups for rollout
- Plan training schedule
- Prepare communication plan

3. Technical Planning

- Document objects to include in timeline
- Identify required fields per object
- Map object relationships
- Define initial filter preferences
- Plan page layout modifications

4. Sandbox Testing

- Ensure sandbox availability
- Refresh sandbox if needed
- Schedule testing time
- Identify test users and data

2.2 Installation Overview

Activity Timeline can be installed via:

1. **AppExchange** (Recommended) - Streamlined, validated, fully supported
2. **Package Installation** - Direct package URL installation

Recommended Installation Path:

1. Install in Full or Partial Sandbox
2. Configure and test thoroughly
3. Train key users
4. Install in Production
5. Deploy to end users

3. Installation

3.1 Installation Steps

Prerequisites:

- Salesforce Enterprise, Unlimited, Performance, or Developer Edition
- System Administrator permissions
- Lightning Experience enabled

Installation Process:

1. Access AppExchange

- Go to <https://appexchange.salesforce.com>
- Search "Activity Timeline MS²"
- Verify publisher: MS² Technologies

2. Install Package

- Click "Get It Now"
- Select environment:
 - **Sandbox** (Recommended for first install)
 - Production (after sandbox testing)
- Log in to target org

3. Choose Installation Scope

- **Install for All Users** (Recommended)
- Install for Admins Only (for testing)
- Install for Specific Profiles (for phased rollout)

4. Complete Installation

- Click "Install"
- Wait 5-15 minutes
- Check Setup → Installed Packages for confirmation

3.2 Verify Installation

After installation completes:

Setup → Installed Packages → "Activity Timeline" appears

Setup

Home

Object Manager

packa

Apps

Packaging

Installed Packages

Package Manager

Package Usage

Didn't find what you're looking for? Try using Global Search.

SETUP

Installed Packages

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Enabled for Platform Integrations	Expiration Date	Install Date	Limits	Apps	Tabs
Uninstall Manage Licenses	FSL	Salesforce	254.57	FSL	Active	Unlimited	0	☐	Does not Expire	28/02/2025 09:39	☐	2	9
Uninstall Manage Licenses	Salesforce Mobile Apps	Salesforce.com	1.24	sf_chtr_apps	Active	Unlimited	0	☐	Does not Expire	26/03/2025 08:00	☐	0	0
Description This package contains connected applications for the officially supported Salesforce Mobile Apps													
Uninstall	Salesforce Field Service App Package	Salesforce	1.60	sf_fieldservice	Free	N/A	N/A	N/A	N/A	28/02/2025 09:44	☒	0	0
Description This package contains the Salesforce Field Service Connected App for all officially supported mobile devices													
Uninstall Configure	Visual Remote Assistant	TechSee Augmented Vision Ltd.	16.9	tspa	Free	N/A	N/A	N/A	N/A	28/05/2025 11:07	☒	1	16
Uninstall Manage Licenses	Freshdesk	Freshworks	1.46	freshdesk	Suspended	Unlimited	0	☐	Does not Expire	29/01/2021 15:28	☐	0	2
Description Freshdesk for Salesforce													
Uninstall	activityTimelineV01	MS2 Technologies	1.1		N/A	N/A	N/A	N/A	N/A	27/10/2025 14:12	☒	1	1

Setup → Object Manager → Search "Timeline" (3 custom objects)

Setup

Home

Object Manager

Object Manager

6 Items, Sorted by Label

Timeline

Schema Builder

Create

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Timeline Record	Timeline_Temp_Config__c	Custom Object		05/09/2025	✓
Timeline Deployment	Timeline_Deployment__c	Custom Object		05/09/2025	✓
Timeline Config	Timeline_Config__c	Custom Object	Configuration object for Timeline components	12/09/2025	✓

Setup → Permission Sets → "Timeline Admin" and "Timeline User" exist

Setup

Home

Object Manager

permission

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

Didn't find what you're looking for? Try using Global Search.

SETUP

Permission Sets

On this page you can create, view, and manage permission sets.

All Edit Delete Create New View

New

A B C D E F G H I J K L M N O P Q R S T

Action	Permission Set Name	Description	License
Clone	Tableau Included App Manager	Allow manage Tableau Included Apps.	Tableau Einstein Included App
Clone	Tableau Next Included App Business User	Allows manage access for the pre-packaged Tableau Next analytics i...	Tableau Einstein Included App
Del Clone	Timeline Admin	Full administrative access to Timeline application - can configure, ma...	
Del Clone	Timeline Child Field Access		
Del Clone	Timeline User	Standard user access to Timeline application - can view and use Tim...	
Clone	Trust Card Manager	Lets users create, read, edit, and delete trust measures for their locat...	Trust Card Manager

3.3 Troubleshooting

Issue	Solution
Installation fails	Verify API version 58.0+, check storage space
Package not visible	Clear cache, log out/in, verify correct org
Permission errors	Confirm System Admin rights, check "Modify All Data"

4. Configuration

4.1 Configuration Overview

Activity Timeline uses a wizard-based configuration process to set up timelines for different objects. Each configuration defines:

- Primary object (e.g., Account, Contact, Opportunity)
- Related objects to display
- Field mappings for each object
- Filters and sorting

4.2 Accessing Configuration

1. Click App Launcher
2. Search "Activity Timeline"
3. Click "Activity Timeline" app
4. Navigate to "Management" tab

4.3 Creating Your First Timeline Configuration

Step 1: Start Configuration Wizard

1. Open Activity Timeline app
2. Click "Management" tab
3. Click "New Configuration" button
4. Configuration wizard launches

Step 2: Select Primary Object

1. Choose the primary object for your timeline:
 - Standard: Account, Contact, Lead, Opportunity, Case,...
 - Custom: Any custom object with Id field
2. Enter configuration details:
 - **Configuration Name:** Descriptive name (e.g., "Account Activity Timeline")
3. Click "Next"

Step 3: Select Related Objects

Choose which related objects to display in the timeline:

***Make sure that the Show Activities option is enabled for the selected object.**

Standard Business Objects:

- Opportunity
- Case
- Contract
- Order
- Quote

Custom Objects:

- Select from dropdown of related custom objects
- Must have lookup or master-detail relationship to primary object

For each selected object, click "Configure" to set up field mappings.

Step 2: Which Objects to Include in the Timeline?

Timeline displayed on: **Opportunity**

Select up to 10 related objects that will appear in the timeline

6/10 objects selected (8 existing, 0 new)

+ Timeline Configuration Name

Timeline for Opportunity

The name will be automatically generated when selecting the parent object

Add new objects (0 selected)

Check the objects you want to add to your existing configuration

Search Objects

Search by object name or label...

☐ AI Insight Values AIInsightValue Lookup	☐ AI Record Insights AIRecordInsight Lookup	☐ Account Partner AccountPartner Lookup	☐ Action Plans ActionPlan Lookup	☐ Attachments Attachment Master Detail	☐ Service Orders CHANNEL_ORDER__Service_Order_ Lookup	☐ Chats Chat__c Lookup	☐ Group Records CollaborationGroupRecord Master Detail	☐ Contact Requests ContactRequest Lookup
☐ Content Deliveries ContentDelivery Lookup	☐ Content Document Link ContentDocumentLink Master Detail	☐ Content Versions ContentVersion Lookup	☐ Engagement Topics EngagementTopic Lookup	☐ Entity Subscriptions EntitySubscription Master Detail				

Showing 1 to 14 of 44 child objects

Previous Page 1 of 4 Next

[Back](#) [Continue](#)

Step 4: Configure Field Mappings

For each selected object, define display fields:

Key Field (Required):

- Primary field shown in timeline (e.g., Subject, Name)
- Should be descriptive and unique

Secondary Key Field (Required):

- Additional Key field (e.g., Status, Type, Date)

Detail Fields (Up to 5):

- Additional fields shown in expanded view
- Choose most relevant fields for users
- Examples: Description, Amount, Owner.Name, Priority

Step 3: Field Configuration

For each selected object, choose the fields to display in the timeline

Configuration for Order

Key Field 1
Order Number (STRING)

Key Field 2
Price Book ID (REFERENCE)

Total Selected Fields
7/7 fields

Fields to display in the timeline:

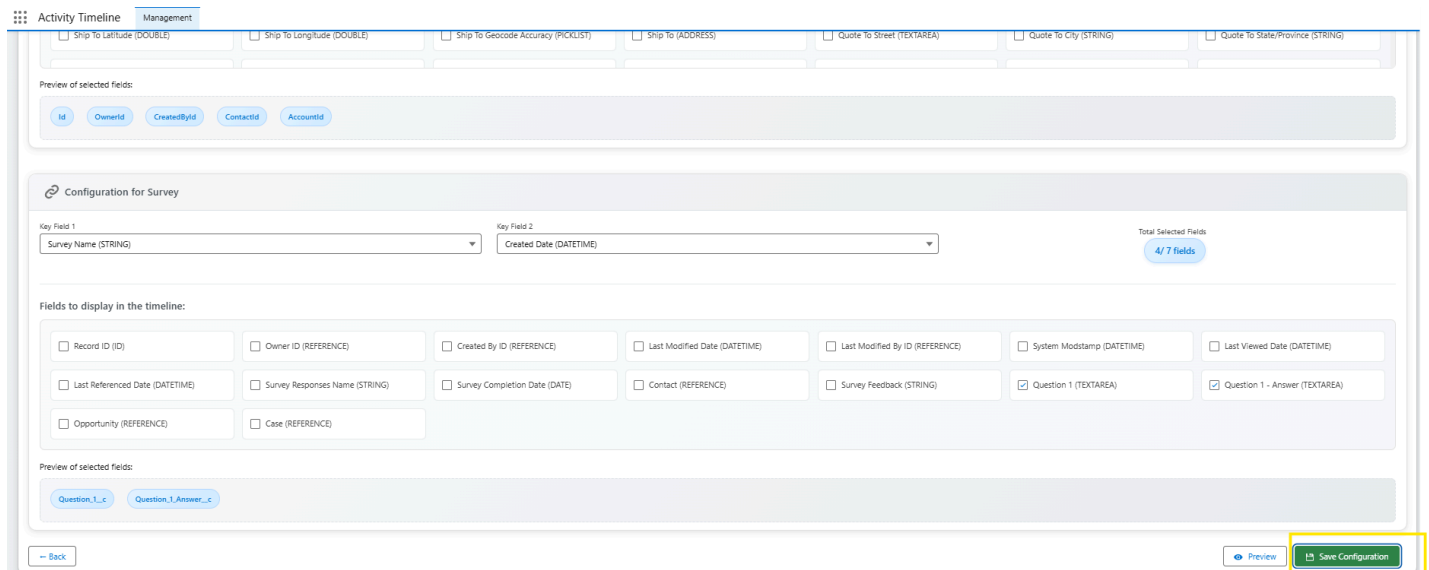
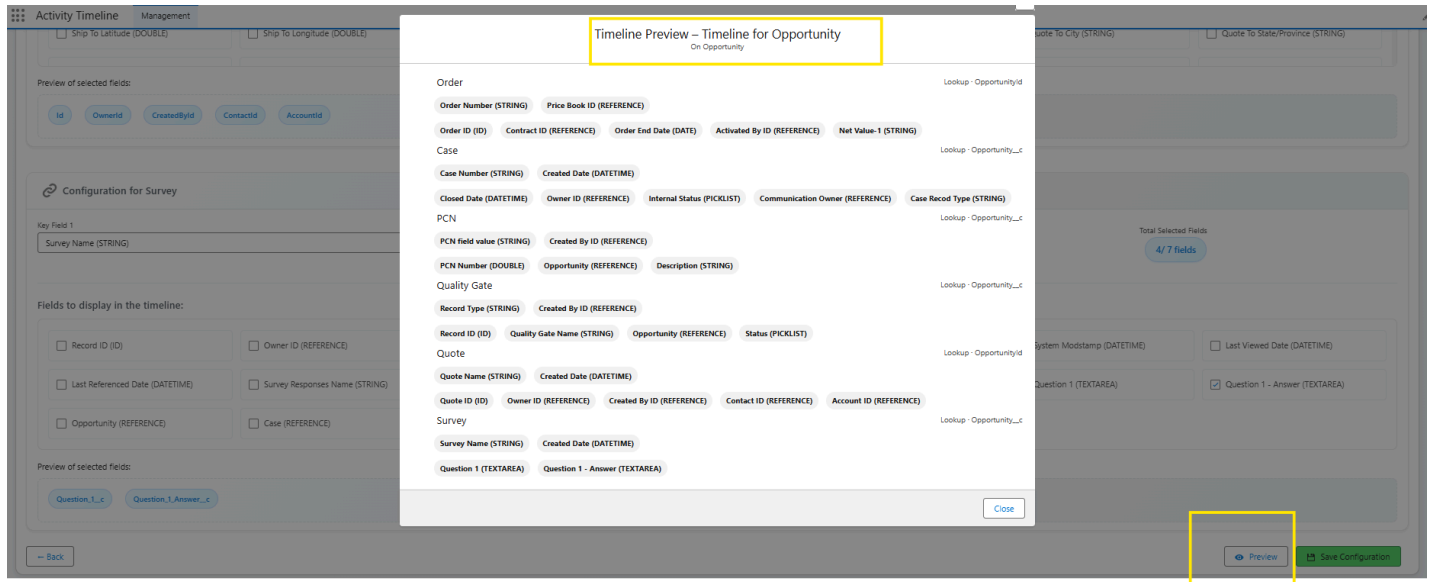
☒ Order ID (ID)	☐ Owner ID (REFERENCE)	☒ Contract ID (REFERENCE)	☐ Account ID (REFERENCE)	☐ Order ID (REFERENCE)	☐ Order Start Date (DATE)	☒ Order End Date (DATE)
☐ Reduction Order (BOOLEAN)	☐ Status (PICKLIST)	☐ Description (TEXTAREA)	☐ Customer Authorized By ID (REFERENCE)	☐ Company Authorized By ID (REFERENCE)	☐ Order Type (PICKLIST)	☐ Billing Street (TEXTAREA)
☐ Billing City (STRING)	☐ Billing State/Province (STRING)	☐ Billing Zip/Postal Code (STRING)	☐ Billing Country (STRING)	☐ Billing Latitude (DOUBLE)	☐ Billing Longitude (DOUBLE)	☐ Billing Geocode Accuracy (PICKLIST)
☐ Billing Address (ADDRESS)	☐ Shipping Street (TEXTAREA)	☐ Shipping City (STRING)	☐ Shipping State/Province (STRING)	☐ Shipping Zip/Postal Code (STRING)	☐ Shipping Country (STRING)	☐ Shipping Latitude (DOUBLE)
☐ Shipping Longitude (DOUBLE)	☐ Shipping Geocode Accuracy (PICKLIST)	☐ Shipping Address (ADDRESS)	☐ Activated Date (DATETIME)	☒ Activated By ID (REFERENCE)	☐ Status Category (PICKLIST)	☐ Order Amount (CURRENCY)
☐ Created Date (DATETIME)	☐ Created By ID (REFERENCE)	☐ Last Modified Date (DATETIME)	☐ Last Modified By ID (REFERENCE)	☐ System Modstamp (DATETIME)	☐ Last Viewed Date (DATETIME)	☐ Last Referenced Date (DATETIME)

Preview of selected fields:

Id ContractId EndDate ActivatedById Net_Value_1_x

Step 5: Review and Save

1. Review configuration summary
2. Verify all settings are correct
3. Click "Save Configuration"
4. Configuration is now available for deployment



4.4 Managing Configurations

Editing Existing Configurations

1. Open Activity Timeline app
2. Click "Management" tab
3. Find configuration to edit

4. Click "Edit"
5. Modify settings using wizard
6. Save changes

Activity Timeline Management

Primary Object: Where to display the timeline

Child Objects: Which objects to include (max 10)

Fields Configuration: Detailed configuration

Step 1: Where to Display the Timeline?

Select the Salesforce object where the timeline will be displayed (record detail page)

Search for an object
Q. e.g., Account, Contact, Opportunity...

Account ✓ ☐

Contact ✓ ☐

Opportunity ✓ ☐

Lead ✓ ☐

Case ✓ ☐

Campaign ☐

Product ☐

Quote ☐

Order ☐

Contract ✓ ☐

Asset ☐

User ✓ ☐

Profile ☐

Group ☐

Attachment ☐

Note ☐

Showing 1 to 16 of 74 objects

Previous Page 1 of 5 Next

Note: Changes apply immediately to all deployed timelines using this configuration.

Deleting Configurations

Permanently remove configuration:

1. Ensure configuration is not deployed to any Lightning pages
2. Select configuration
3. Click "Delete"
4. Confirm deletion

Activity Timeline Management

Primary Object: Where to display the timeline

Child Objects: Which objects to include (max 10)

Fields Configuration: Detailed configuration

Existing Configurations Management

Primary Object: Case

Manage Child Objects already configured for this object

Select a Configuration
Timeline for Case (3 objects)

Configured Child Objects (3)

Case Contact Role
CaseContactRole
Configure 4 fields

Case History
CaseHistory
Configure 4 fields

Opportunity
Opportunity
Configure 4 fields

Warning: This action cannot be undone.

4.5 Configuration Best Practices

1. Start Simple

- Begin with 3-4 object types
- Add more as users become familiar
- Monitor performance with each addition

2. Choose Relevant Fields

- Display fields users actually need
- Avoid technical fields (IDs, system fields)
- Include fields that drive action

3. Use Consistent Visual Themes

- Related objects in similar colors
- Distinct colors for different categories
- Follow Salesforce color guidelines

4. Test Before Deployment

- Create test configuration first
- Validate with sample data
- Get user feedback
- Adjust based on testing

5. Document Configurations

- Maintain configuration inventory
- Document business purpose
- Track customizations
- Note dependencies

6. Plan for Scale

- Consider data volume
- Test with realistic record counts
- Monitor performance
- Adjust as needed

5. Deployment

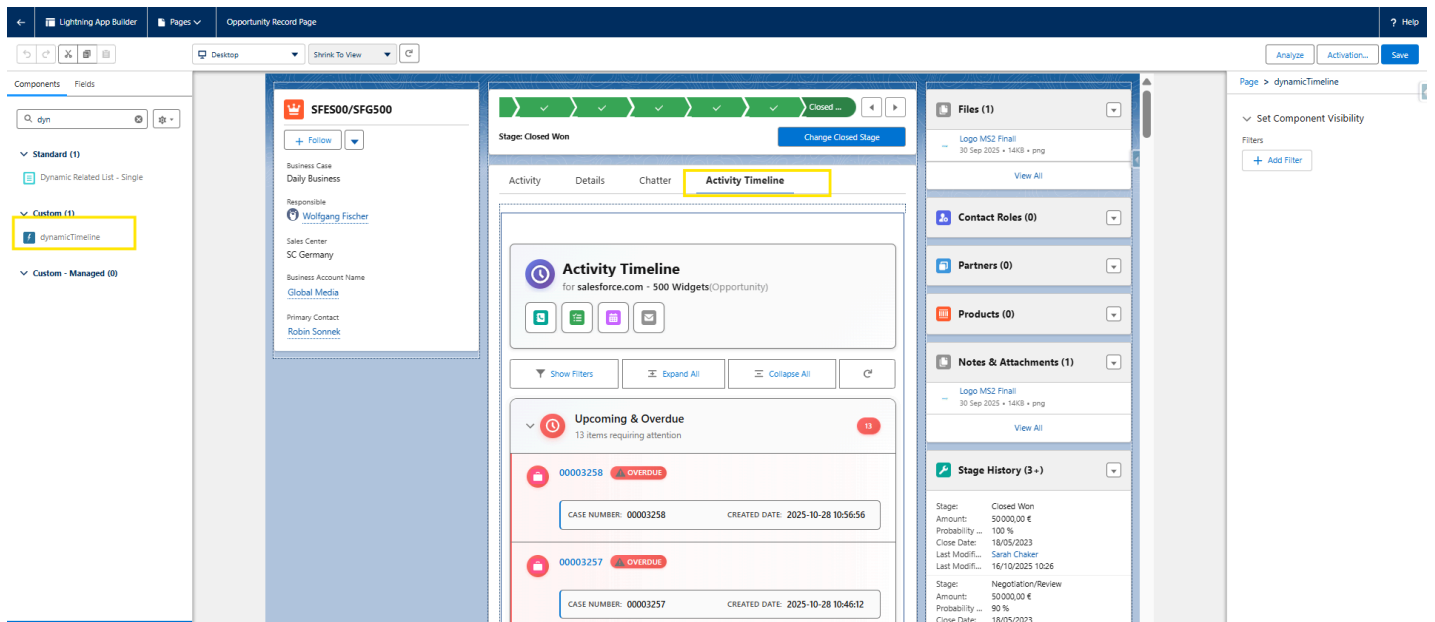
5.1 Adding Timeline to Lightning Pages

Step 1: Open Lightning App Builder

1. Navigate to record page (e.g., Account)
2. Click (gear icon)
3. Select "Edit Page"

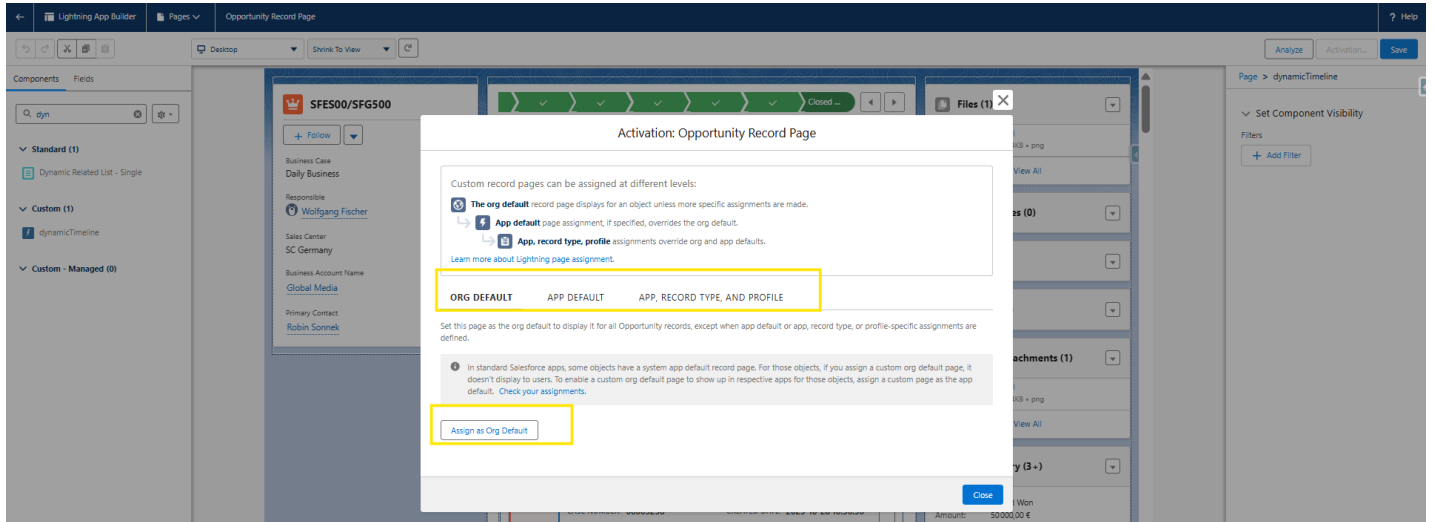
Step 2: Add Timeline Component

1. In Lightning App Builder, locate "Dynamic Timeline" in component list
2. Drag component to desired location on page:
 - Full-width section recommended
 - Typically placed in main content area
 - Can be placed in tabs for cleaner layout
3. Component appears on page canvas



Step 3: Activate Page

Activation Tab:



1. Click "Activation" button (top-right)
2. Set page assignment:
 - **App Default:** Available in specific apps
 - **App, Record Type, Profile:** Most granular control
 - **Org Default:** Available to all users

App Assignment:

- Select Salesforce apps where page should appear
- Common choices: Sales, Service, Custom apps
- Can assign to multiple apps

Profile/Record Type Assignment:

- Choose profiles that should see this page
 - Select specific record types if applicable
 - Set as default if desired
3. Click "Save"

Form Factor:

- Desktop (always include)
- Phone (optional, but recommended)
- Tablet (optional, but recommended)

Step 6: Save and Test

1. Click "Save" in Lightning App Builder
2. Click "Back" to return to record

3. Refresh page if timeline doesn't appear immediately
4. Test all functionality:
 - Timeline loads
 - Filters work
 - Search functions
 - Records display correctly

5.2 Training End Users

Quick Start Guide

Finding the Timeline:

1. Navigate to any Account (or configured object)
2. Scroll to Activity Timeline section
3. Timeline loads automatically

Basic Navigation:

1. Scroll through activities
2. Click any activity to see details
3. Use filters to narrow results
4. Search for specific information

Common Tasks:

1. Finding recent emails
2. Checking upcoming tasks
3. Reviewing meeting history

Power User Training

Advanced Filtering:

- Combining multiple filters
- Creating custom date ranges
- Saving filter preferences

Search Techniques:

- Keyword search
- Field-specific search
- Boolean operators

Visual Customization:

- Adjusting view preferences
- Customizing display fields
- Managing personal settings

Administrator Training

Configuration Management:

- Creating new configurations
- Editing field mappings
- Managing visual settings

Deployment:

- Adding to Lightning pages
- Setting visibility rules
- Managing page variants

Troubleshooting:

- Common user issues
- Performance optimization
- Support escalation

6. User Management

Assigning Permission Sets

Timeline User (End Users):

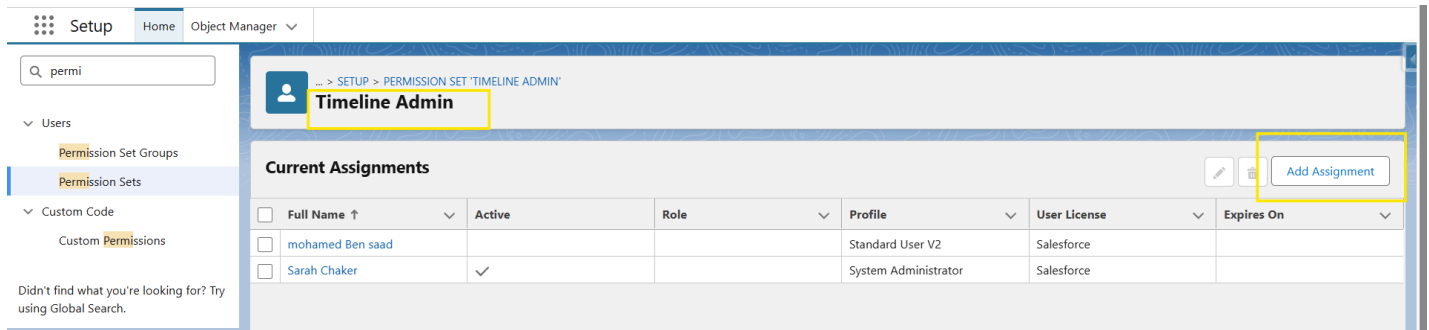
1. Setup → Users → Permission Sets
2. Click "Timeline User"
3. Click "Manage Assignments"
4. Click "Add Assignments"
5. Select users
6. Click "Assign"

The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'permis' and a navigation menu with 'Users', 'Permission Set Groups', 'Permission Sets', 'Custom Code', and 'Custom Permissions'. The main content area is titled 'Timeline User' and shows a green success message: '1 assignments were successful.' Below this is an 'Assignment Summary' table.

Full Name	User License	Expires On	Time Zone	Status
MS2 USER 3	Salesforce Platform			Success

Timeline Admin (Administrators):

1. Follow same process as above
2. Select "Timeline Admin" permission set
3. Assign to admin users only



Bulk Assignment:

- Use Data Loader for large user groups
- Export current assignments
- Modify and import updated list

Permission Set Contents

Timeline User Permissions:

- Use Activity Timeline component
- Basic search and filter capabilities

Timeline Admin Permissions:

- All Timeline User permissions
- Create/Edit/Delete Timeline configurations
- Manage Timeline custom objects
- Access configuration management
- View usage analytics

7. Security & Permissions

7.1 Permission Model

Activity Timeline follows Salesforce's layered security model:

Layer 1: Object-Level Security

- Controlled by profiles and permission sets
- Configurations respect org-wide defaults

Layer 2: Field-Level Security (FLS)

- No action exposed beyond user's access level

Layer 3: Record-Level Security

- Sharing rules enforced
- Private records remain private
- Role hierarchy respected
- Manual shares honored

Layer 4: Configuration Access

- Timeline Admin: Full configuration rights
- Timeline User: View component -only access
- Custom permission sets available

7.2 Data Security

Security Checks

The Activity Timeline performs these security validations:

CRUD Operations:

- Create: supported only for (Email, Task, Call, Event)
- Read: Full FLS and sharing enforcement
- Update: Full FLS and sharing enforcement
- Delete: Full FLS and sharing enforcement

SQL Injection Protection:

- Parameterized queries
- Input sanitization
- No dynamic SOQL from user input
- Strict type checking

Sensitive Data Handling

Best Practices:

1. **Don't display sensitive fields** in timeline
 - Social Security Numbers
 - Credit card numbers
 - Passwords or security answers
 - Personal health information

2. **Use field-level security** for confidential data
 - Remove sensitive fields from timeline field mappings
 - Rely on FLS for automatic enforcement
3. **Implement data masking** if needed
 - Custom formula fields with masked values
 - Display only last 4 digits of account numbers
4. **Audit trail**
 - Monitor who views timelines
 - Log access to sensitive objects
 - Review regularly

8. Maintenance & Optimization

8.1 Performance Monitoring

Regularly check how well your Salesforce component is performing to make sure users have a smooth experience.

What to Keep an Eye On:

- **Page Load Time:** How long it takes for the timeline or main screen to open.
- **Number of Records Shown:** Too many records can slow things down, show only what's needed.
- **Browser Performance:** Watch how much memory or processing power your app uses.
- **Errors and Logs:** Keep track of any system or user errors that appear.
- **Data Queries:** Make sure your data lookups are quick and not returning unnecessary information.

Tip: Use Salesforce tools like the **Lightning Usage App** or **Debug Logs** to spot performance issues early.

8.2 Optimization Recommendations

To keep your app running fast and stable:

- **Show Fewer Records at First:** Start with key records and let users load more if needed.
- **Filter Data Wisely:** Use filters to display only relevant information.

- **Load Content Gradually:** Load extra details or related lists only when the user opens them.
- **Keep Screens Simple:** Avoid adding too many components or charts on one page.

9. Troubleshooting

9.1 Common Issues and Solutions

Issue: Timeline Not Displaying

Symptoms:

- Blank section where timeline should be
- Error message: "Component not found"
- Loading spinner indefinitely

Solutions:

Check 1: Component Added to Page

1. Edit Lightning page
2. Verify Activity Timeline component is present
3. Check component is not hidden by visibility rules
4. Save and activate page

Check 2: Configuration Exists

1. Open Activity Timeline app → Management
2. Verify configuration exists for this object

Check 3: Permissions

1. Verify user has Timeline User permission set
2. Check object permissions
3. Confirm field-level security
4. Test with System Admin (to rule out permissions)

Issue: No Records Showing

Symptoms:

- Timeline displays but shows "No activities found"
- Empty state even though records exist

Solutions:

Check 1: Filter Settings

1. Check active time filter (may be too restrictive)
2. Try "All Time" filter
3. Disable all type filters
4. Clear object filters

Check 2: Data Existence

1. Verify records exist in related objects
2. Check records are linked to parent record
3. Confirm relationship field is populated correctly
4. Query records directly in Developer Console

Check 3: Field Mappings

1. Review configuration field mappings
2. Verify relationship field is correct
3. Check date field has values
4. Ensure mapped fields exist on object

Check 4: Record Access

1. Verify user can see records individually
2. Check sharing rules
3. Review org-wide defaults
4. Test with profile that has broad access

Check 5: SOQL Query

1. Enable debug logs for user
2. Review generated SOQL query
3. Run query in Developer Console
4. Check for syntax errors or missing fields

Issue: Slow Performance

Symptoms:

- Timeline takes >5 seconds to load
- Scrolling is laggy
- Browser becomes unresponsive
- Timeout errors

Solutions:

Check 1: Data Volume

1. Count total records in timeline
2. If >1000 records, consider:
 - More restrictive default filters
 - Shorter initial time range
 - Fewer initial records loaded
 - Archive old data

Check 2: Field Count

1. Review detail fields per object
2. Reduce to 3-5 most important fields
3. Remove formula fields if possible

Check 3: Query Optimization

1. Add indexes to date fields
2. Make filters more selective
3. Review query plan in Developer Console
4. Contact Support for query optimization

Check 5: Browser/Cache

1. Clear browser cache
2. Test in incognito mode
3. Try different browser
4. Check browser console for errors
5. Disable browser extensions

Issue: Permission Errors

Symptoms:

- "Insufficient privileges" error
- "You don't have access" message
- Partial timeline display

Solutions:

Check 1: Permission Sets

1. Setup → Users → Permission Set Assignments
2. Verify Timeline User is assigned
3. Check object permissions in permission set
4. Review field permissions

Check 2: Profile Permissions

1. Setup → Users → Profiles
2. Select user's profile
3. Review object permissions
4. Check field-level security

Check 3: Sharing Rules

1. Setup → Security → Sharing Settings
2. Review org-wide defaults for objects
3. Check sharing rules
4. Verify user's role in hierarchy

9.2 Debug Logging

Enabling Logs

Debug logs help you understand what's happening behind the scenes in your Salesforce custom application. They're useful for finding the cause of errors, slow performance, or unexpected behavior.

How to Enable and Use Logs:

- **Turn On Debug Logs in Setup:** Go to **Setup** → **Debug Logs** and add the user or process you want to monitor.
- **Set Trace Levels:** Choose the right level of detail (for example, errors only or detailed events) based on what you're troubleshooting.
- **Check Browser Console:** Use the browser's developer tools (F12 or Ctrl+Shift+I) to view JavaScript logs and messages.
- **Use Developer Tools:** Inspect network activity and performance data to identify slow responses or script issues.

Verification Points

Once logging is enabled, review the information to confirm the app is working as expected and to spot problem areas.

What to Look For:

- **API Calls:** Make sure calls to Salesforce or external systems are completing successfully.
- **Response Times:** Check how long it takes for pages or data to load.
- **JavaScript Errors:** Review any errors or warnings in the browser console to fix issues in your custom components.

9.3 Support Resources

Self-Service Resources

Documentation:

- Administrator Guide (this document)
- User Guide
- Configuration Wizard help text

Contacting Support

MS² Technologies Support:

- Email: contact@ms2tech.fr
- Response time: 24-48 hours business days
- Priority support available for enterprise customers

When Contacting Support, Include:

1. Environment Information:

- Salesforce edition
- API version
- Timeline package version
- Browser and version

2. Problem Description:

- What you're trying to do
- What's happening instead
- When problem started
- Frequency (always, sometimes, once)

3. Steps to Reproduce:

- Detailed step-by-step
- Screenshots or screen recording
- Sample data (if relevant)

4. Troubleshooting Already Done:

- Steps you've tried
- Results of each step
- Error messages received

5. Debug Logs:

- Attach relevant debug logs
- Note timestamp of issue
- Highlight relevant sections

6. Configuration Export:

- Export configuration as JSON
- Include object and field mappings
- Note any customizations

Support Ticket Priority:

Priority 1 (Critical):

- Timeline completely non-functional
- Data security issue
- Affects all users
- Response: 8 hours

Priority 2 (High):

- Major feature not working
- Significant performance degradation
- Affects multiple users
- Response: 12 hours

Priority 3 (Medium):

- Minor feature issue
- Workaround available
- Affects some users
- Response: 24 hours

Priority 4 (Low):

- Cosmetic issue
- Enhancement request
- Single user affected
- Response: 48 hours

10. Best Practices Summary

Configuration Best Practices

1. **Start simple** - Begin with 3-4 key objects, expand gradually
2. **Test thoroughly** - Always test in sandbox before production
3. **Document everything** - Maintain configuration inventory and change log
4. **Use consistent naming** - Follow naming conventions for configurations
5. **Regular reviews** - Quarterly audit of all configurations
6. **Performance first** - Monitor load times and optimize proactively
7. **User feedback** - Collect and act on user input regularly

Deployment Best Practices

1. **Pilot first** - Test with small group before org-wide rollout
2. **Train users** - Provide comprehensive training before go-live
3. **Communicate clearly** - Set expectations and provide resources
4. **Support ready** - Have support team prepared for questions
5. **Monitor closely** - Watch performance and adoption metrics
6. **Iterate quickly** - Make improvements based on feedback
7. **Celebrate success** - Share wins and positive outcomes

Performance Best Practices

1. **Limit initial records** - Start with 20-30 records
2. **Use selective filters** - Default to recent time periods
3. **Minimize fields** - Display only essential fields
4. **Enable lazy loading** - Load additional records on demand
5. **Index key fields** - Ensure date fields are indexed
6. **Cache effectively** - Use browser caching strategically
7. **Monitor regularly** - Track performance metrics weekly

Security Best Practices

1. **Least privilege** - Grant minimum necessary permissions
2. **Regular audits** - Review access quarterly
3. **No sensitive data** - Don't display confidential fields
4. **FLS enforcement** - Rely on field-level security
5. **Test permissions** - Verify access controls work
6. **Document security** - Maintain security documentation
7. **Stay updated** - Keep informed of security patches

Glossary

Activity Timeline: Lightning Web Component displaying chronological record interactions

Configuration: Collection of settings defining timeline appearance and behavior

Primary Object: Main Salesforce object where the timeline is displayed (e.g., Account, Contact)

Related Object: Secondary objects shown in the timeline (e.g., Task, Event, Email)

Child Object: Alternative term for related object in timeline configuration

Field Mapping: Configuration linking object fields to timeline display elements

Relationship Field: Field that connects a related object to the primary object

Key Field: field displayed as the activity headline in timeline

Date Field: Field used to sort activities chronologically

Detail Fields: Additional fields shown in expanded activity view

Time Filter: Date range selection limiting which records appear

Type Filter: Object type selection (Task, Email, Event, etc.)

Lazy Loading: Progressive loading of additional records as user scrolls

Grouping: Organizing activities by time periods (day, week, month)

Sort Order: Direction of chronological display (Newest First or Oldest First)

Permission Set: Collection of permissions granted to users

Field-Level Security (FLS): Controls which fields users can view

Object-Level Security: Controls which objects users can access

Record-Level Security: Controls which specific records users can see

Org-Wide Default: Default record access level for all users

Sharing Rule: Rule granting additional record access to specific users or groups

Lightning Page: Customizable page layout in Lightning Experience

Lightning App Builder: Tool for customizing Lightning pages

Icon: Visual symbol representing an object type in the timeline

Debug Log: Detailed log of system operations for troubleshooting

AppExchange: Salesforce marketplace for applications and components

Contact & Support

Developer: MS² Technologies

Support Email: contact@ms2tech.fr

AppExchange: Search "Activity Timeline" on AppExchange

Documentation: Available in Activity Timeline app

Document Version: 1.0

Last Updated: October 2025

Next Review: January 2026

© 2025 MS² Technologies - All Rights Reserved