Activity Timeline Administrator Guide

Version 1.0
October 2025

Technologies

Developed by MS² Technologies

For Salesforce Users

Salesforce API Version: 58.0+

Compatible With: Lightning Experience

Contact Information

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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.

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

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:

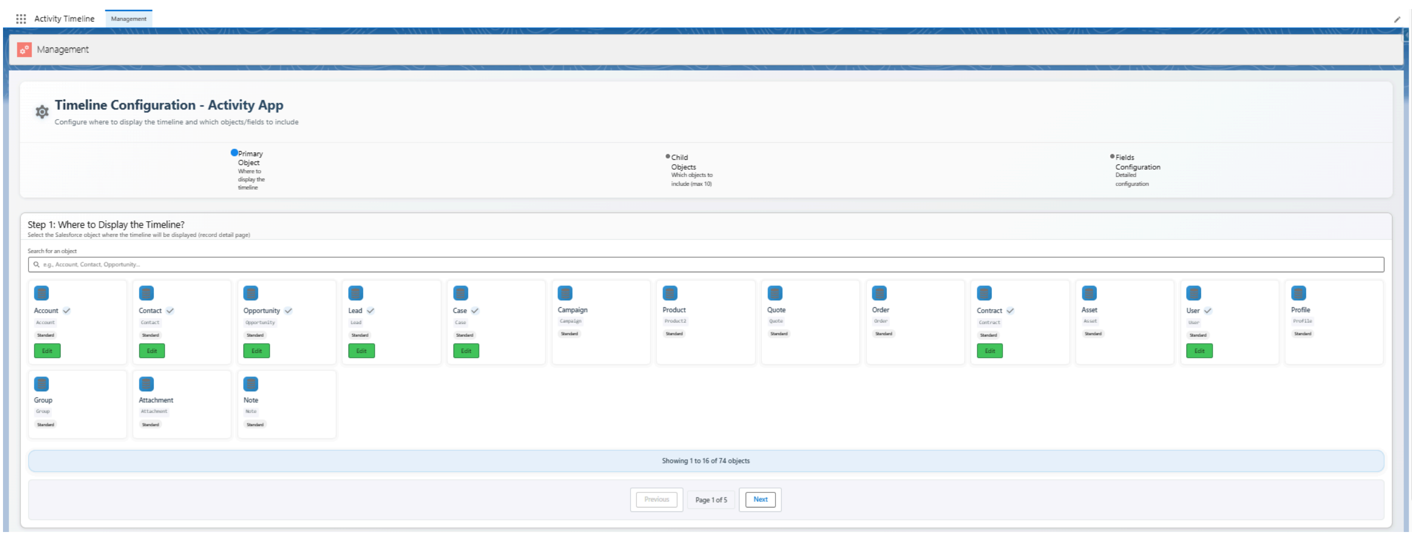
- **Universal Compatibility** - Works with any standard or custom object
- **Dynamic Configuration** - No-code setup for administrators
- **Visual Clarity** - Intuitive icons, colors, and grouping
- **High Performance** - Optimized queries and lazy loading
- **Flexible Display** - Multiple view options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

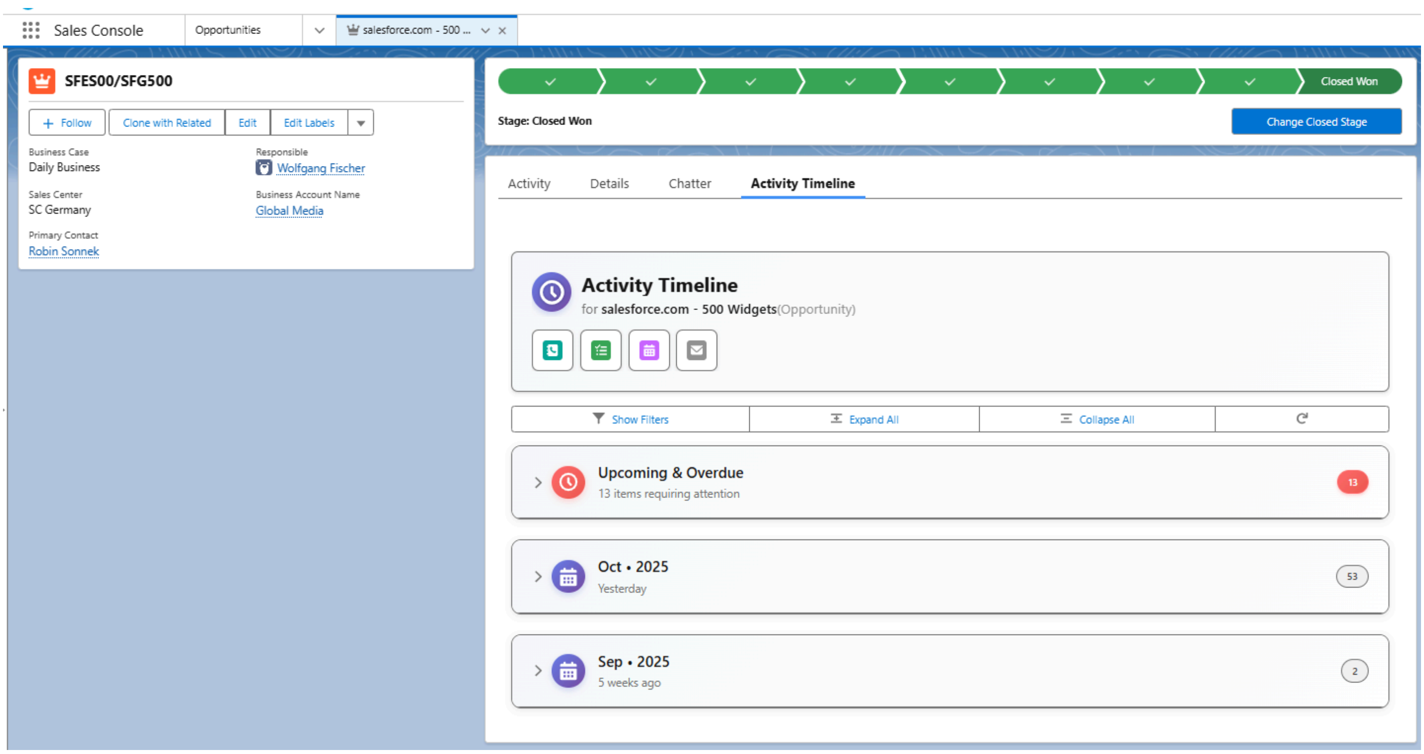
1.3 Key Features

Core Capabilities



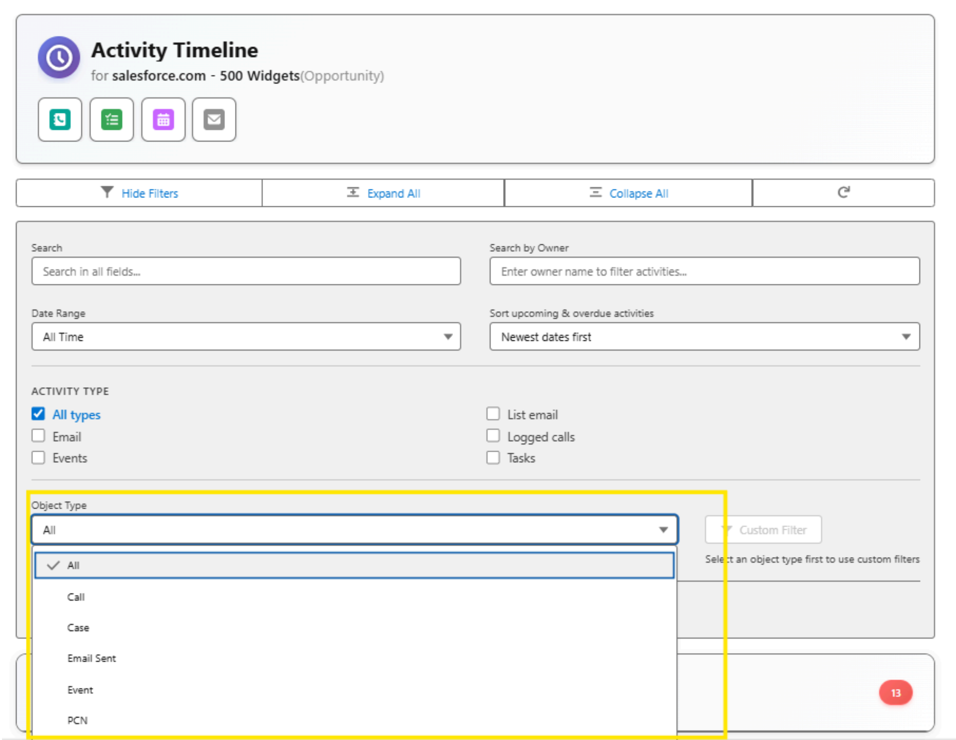
1. Dynamic Timeline Display

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



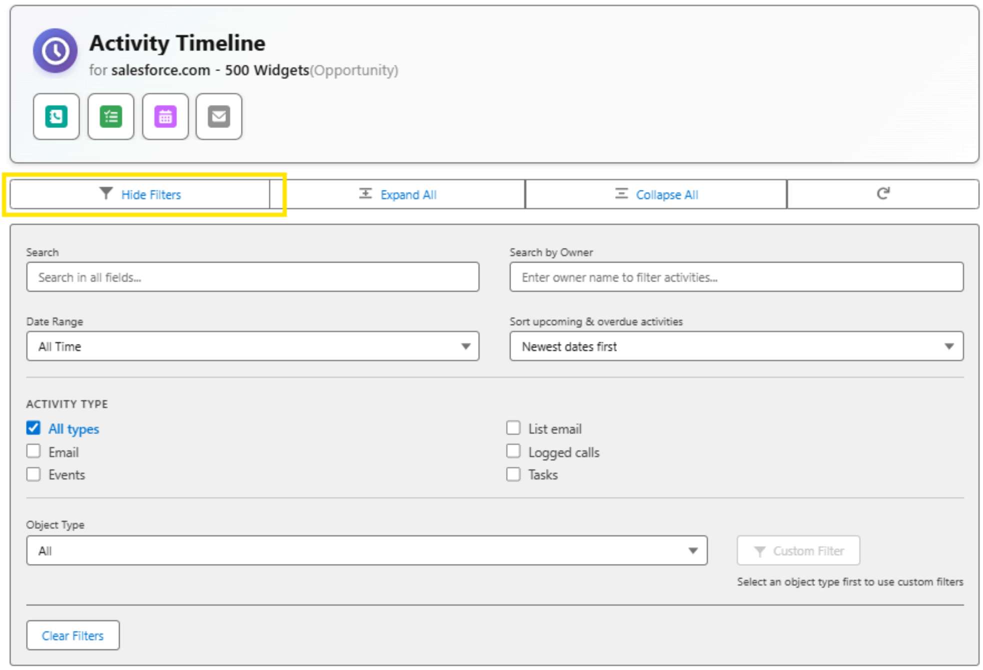
2. Multi-Object Support

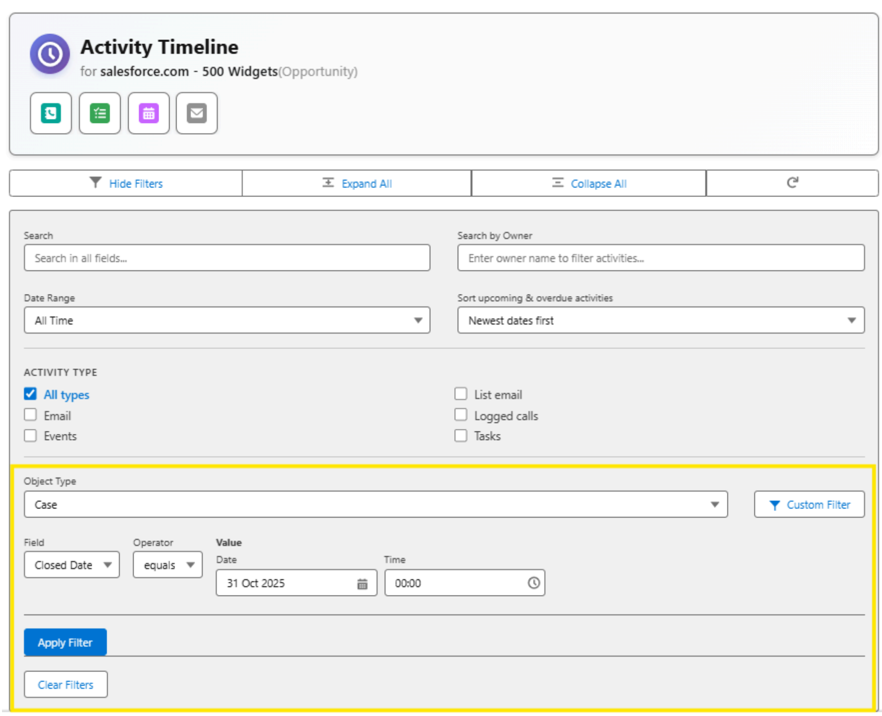
- Standard activities: Task, Event, Email, Call
- Business objects: Opportunity, Case, Contract, Order, Quote,..
- Custom objects with lookup/master-detail relationships



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



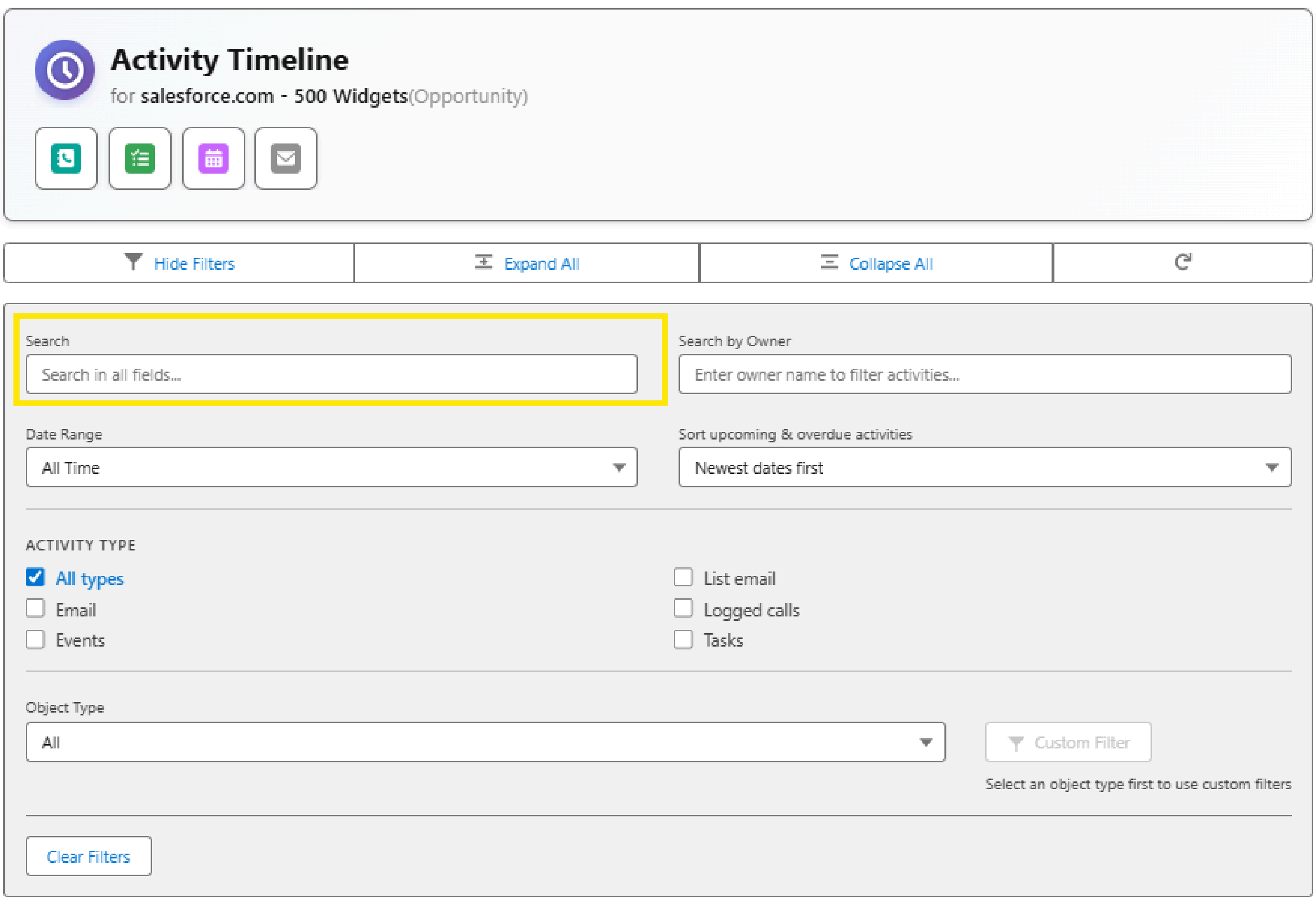


4. Visual Customization

- 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



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:

PRESENTATION LAYER (Frontend)

Timeline LWC Component ←→ **Configuration UI Component**

Timeline LWC Component
- Display logic
- User interface
- Event handling

Configuration UI Component
- Setup wizard
- Field mapping
- Visual config

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BUSINESS LOGIC LAYER (Backend)

Timeline Controller
- Data retrieval
- Query building
- Security checks

Configuration Controller
- CRUD operations
- Validation
- Helper methods

Security Handler
- FLS checks
- Sharing rules

Utility Classes
- Data formatting
- Date operations
- Field parsing

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DATA LAYER (Custom Objects)

• **Dynamic_Timeline_Configuration__c**
- Stores timeline configurations
- Primary object selection
- Display settings

• **Dynamic_Timeline_Child_Object__c**
- Related object definitions
- Field mappings
- Visual configurations

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                    • Timeline_Temp_Config__c
                      - Temporary configuration storage
                      - Draft configurations
                     - Wizard state management
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┌──────────────────────────────────────────────────────────────┐
                    SALESFORCE STANDARD OBJECTS
                    • Task, Event, EmailMessage, Call
                    • Opportunity, Case, Contract, Order, Quote,..
                    • Custom Objects (user-defined)
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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:

<u>For Installation:</u>

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

<u>For Configuration:</u>

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

<u>For End Users:</u>

- 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

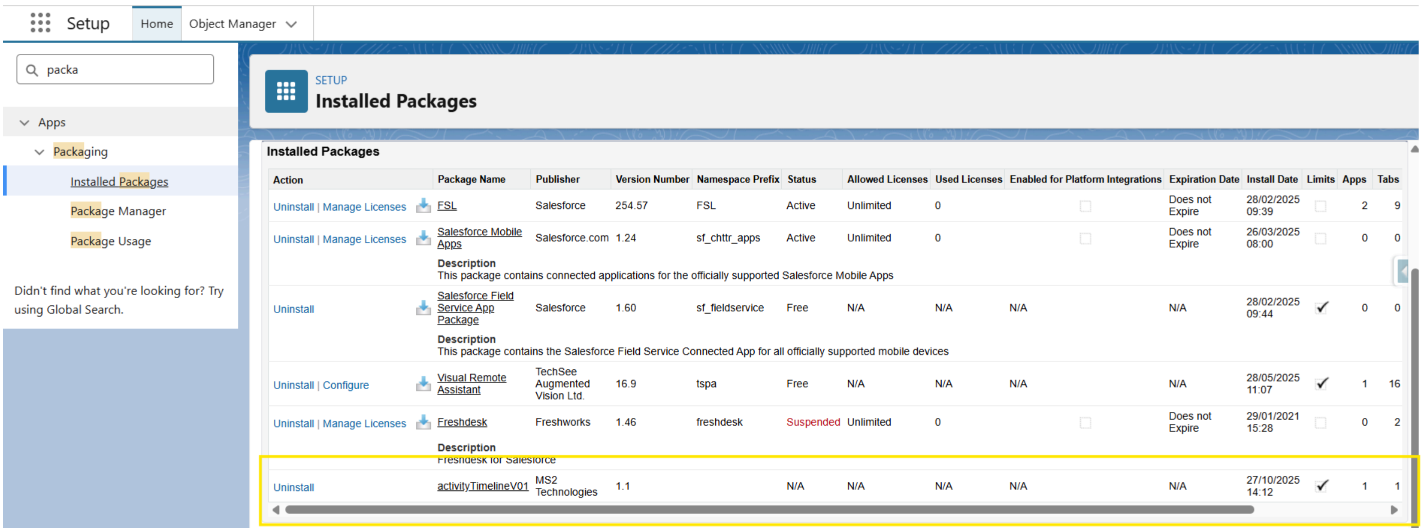
Installation Process:

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

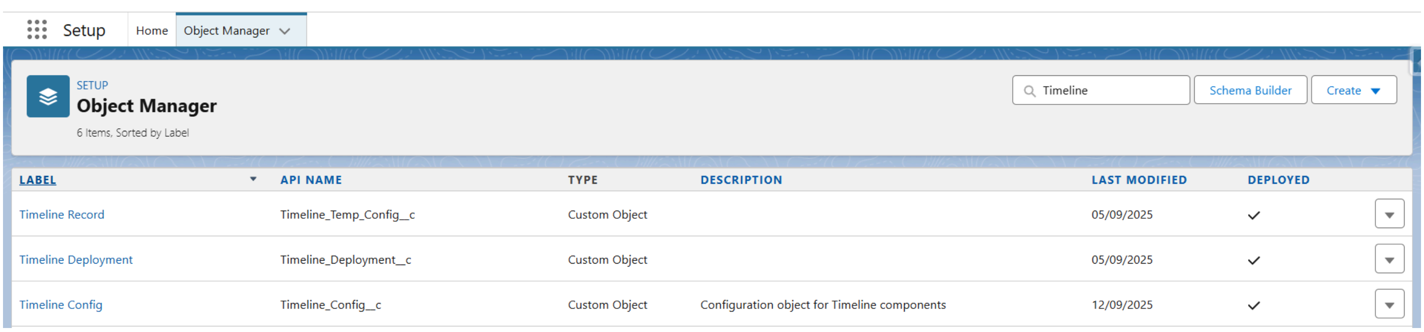
3.2 Verify Installation

After installation completes:

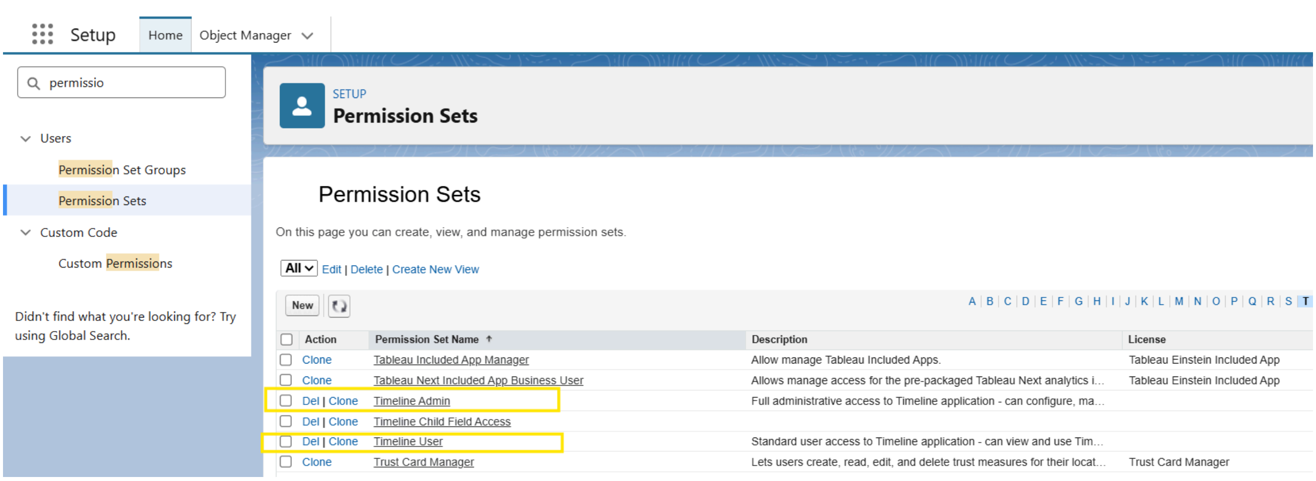
Setup → **Installed Packages** → "Activity Timeline" appears



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



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



3.3 Troubleshooting

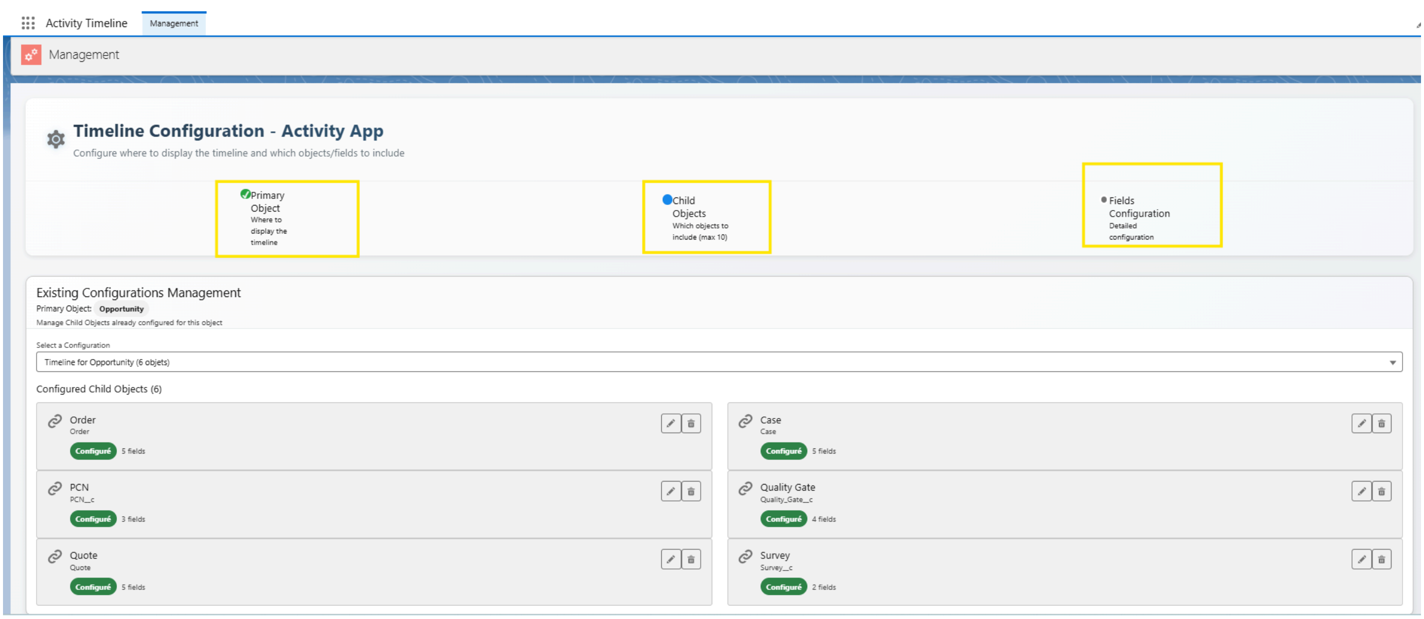
Issue	Solution
Installation fails	Verify API version 58.0+, check storage space
Package not visible	Clear cache, log out/in, verify correct org
Permission errors	Confirm System Admin rights, check "Modify All Data"

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 <u>Show Activities</u> option is enabled for the selected object**.

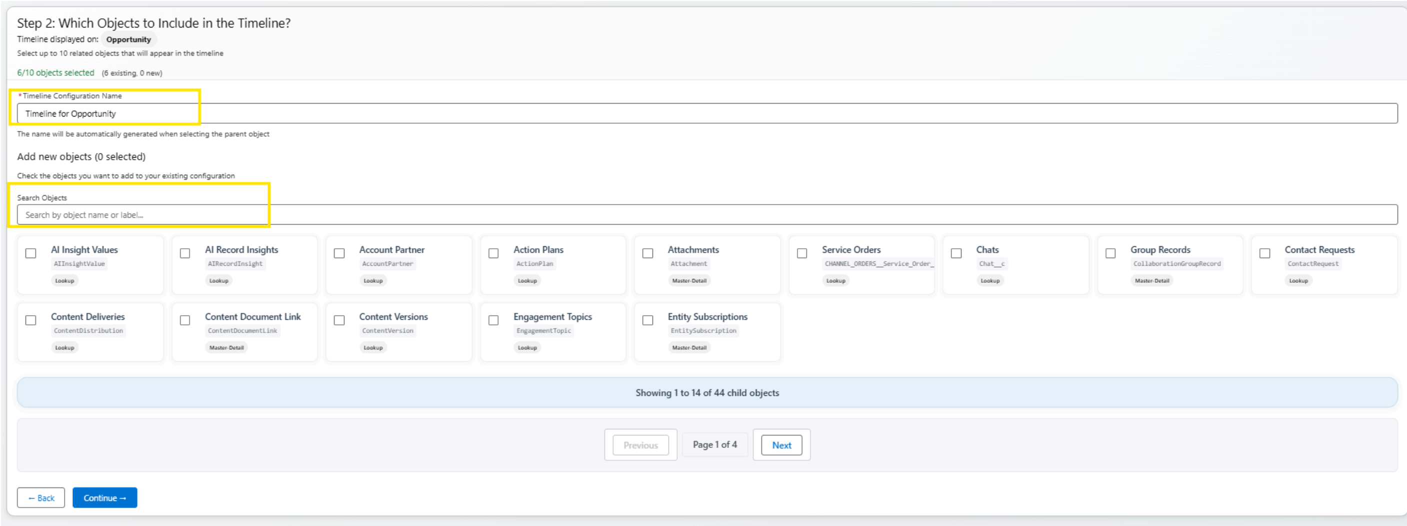
Standard Business Objects:

- 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 4: Configure Field Mappings

For each selected object, define display fields:

Key Field (Required):

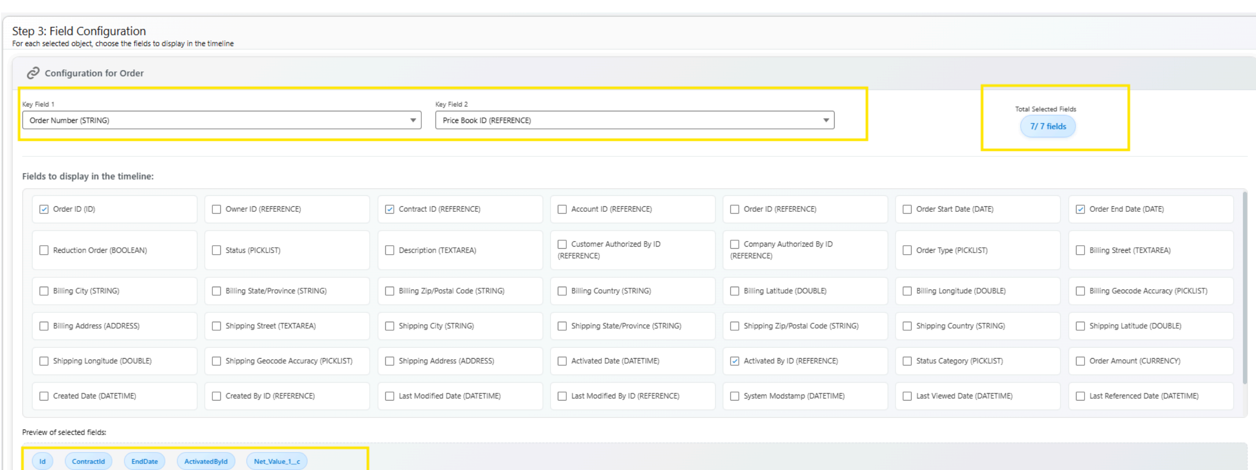
- Primary field shown in timeline (e.g., Subject, Name)
- Should be descriptive and unique

Secondary Key Field (Required):

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

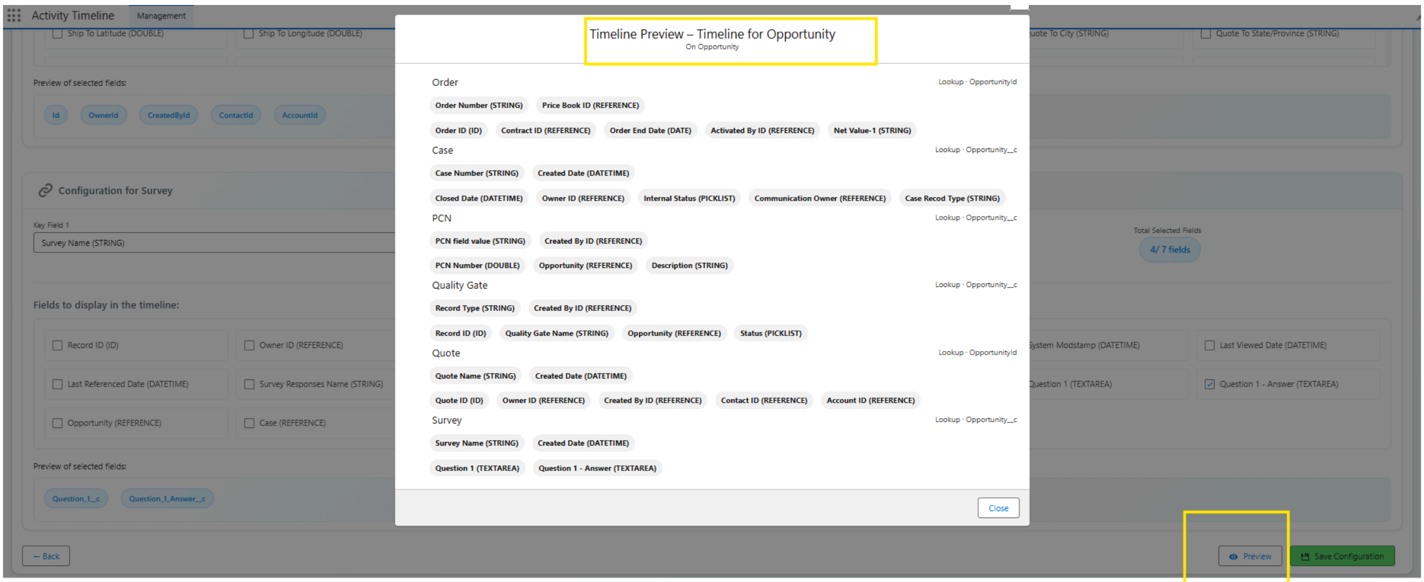
Detail Fields (Up to 5):

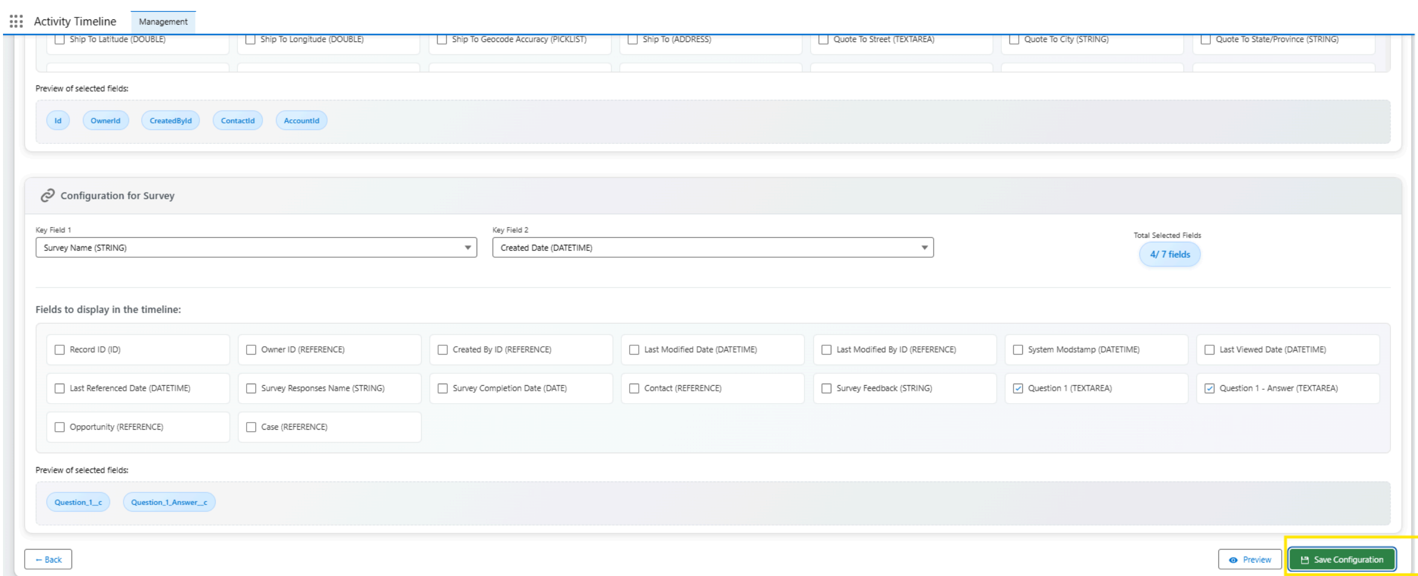
- Additional fields shown in expanded view
- Choose most relevant fields for users
- Examples: Description, Amount, Owner.Name, Priority



Step 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



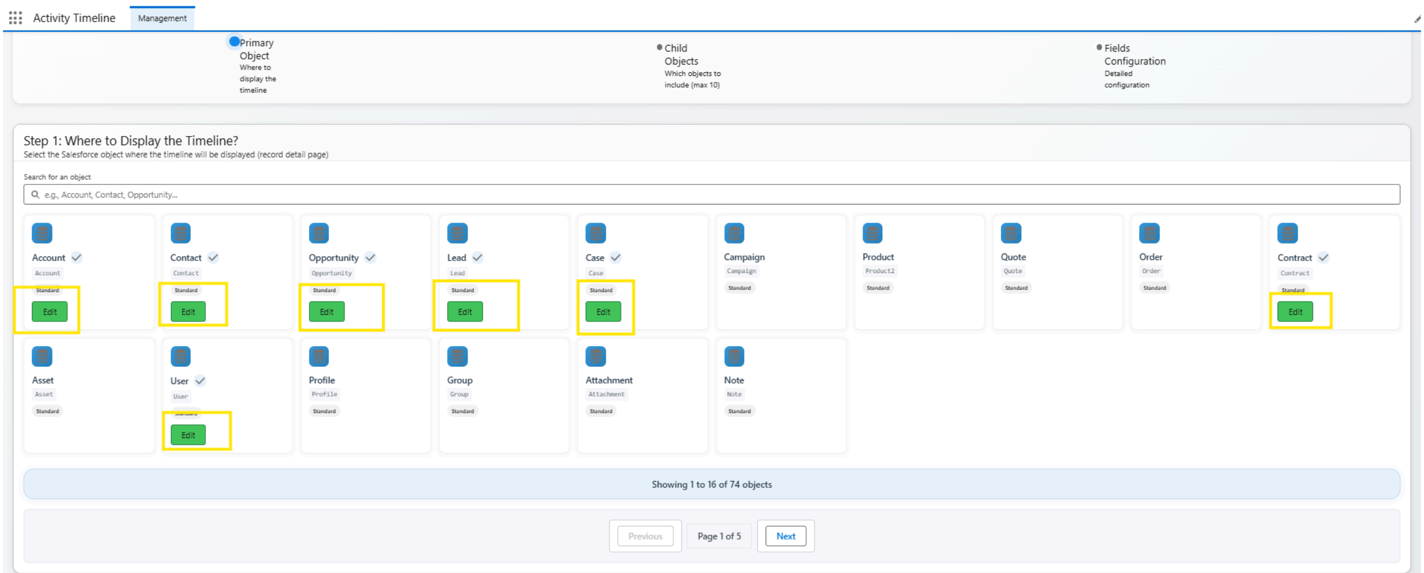


4.4 Managing Configurations

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

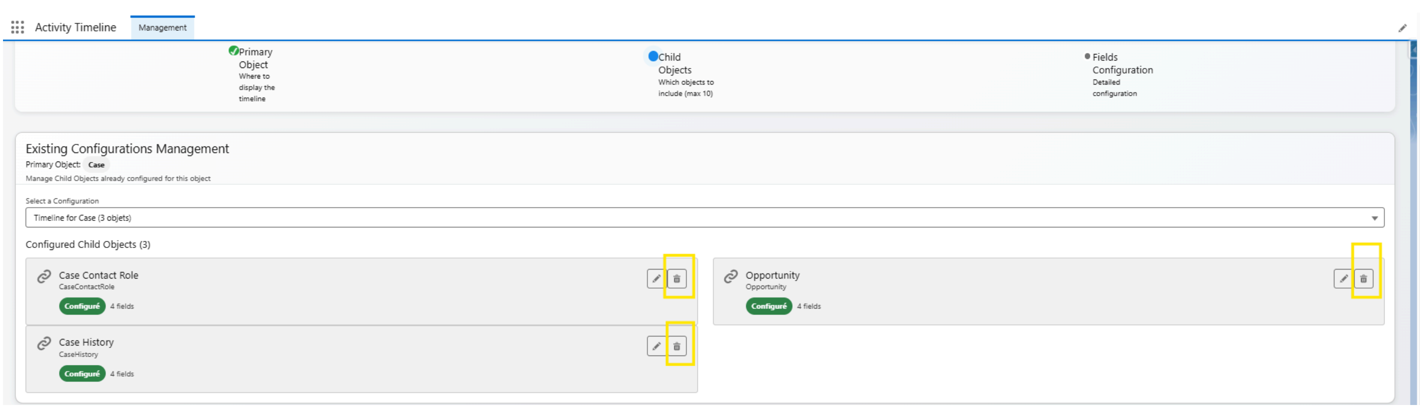


Note: Changes apply immediately to all deployed timelines using this configuration.

Deleting Configurations

Permanently remove configuration:

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



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

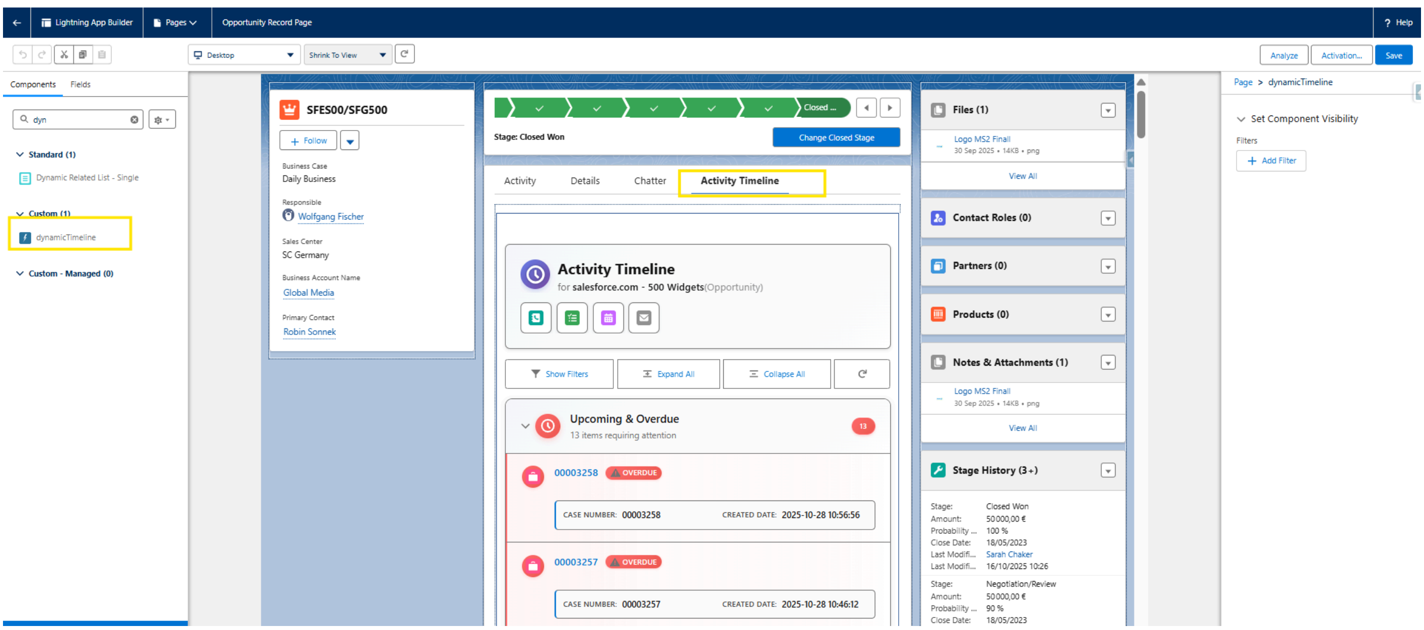
1. Navigate to record page (e.g., Account)
2. Click (gear icon)
3. Select "Edit Page"

Step 2: Add Timeline Component

1. In Lightning App Builder, locate "Dynamic Timeline" in component list

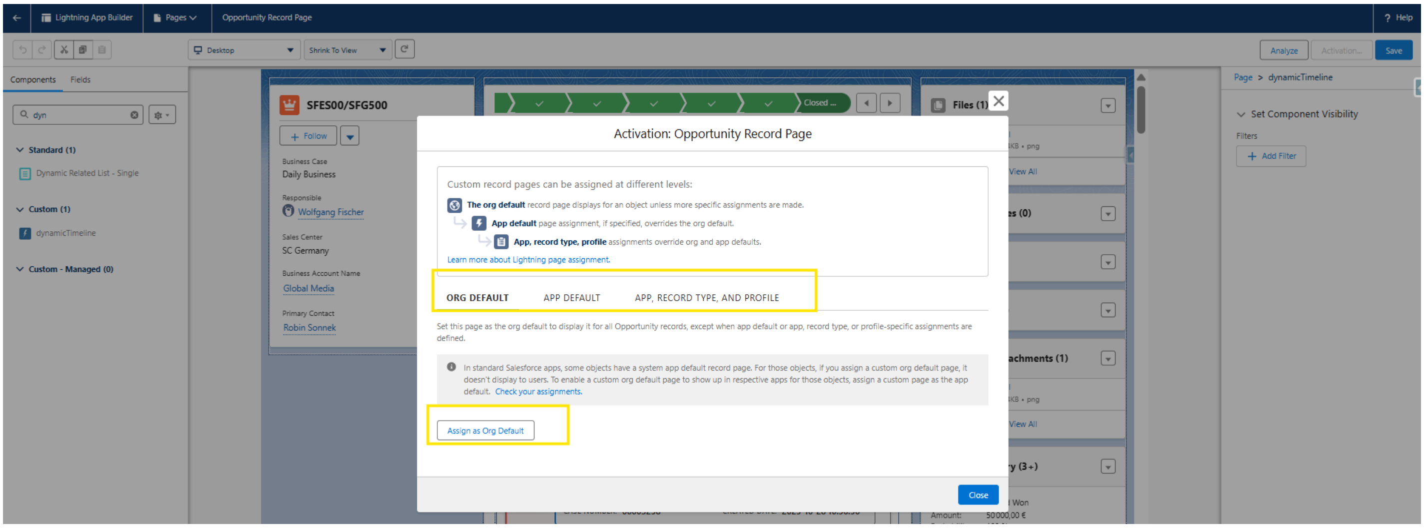
2. Drag component to desired location on page:

    - 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:

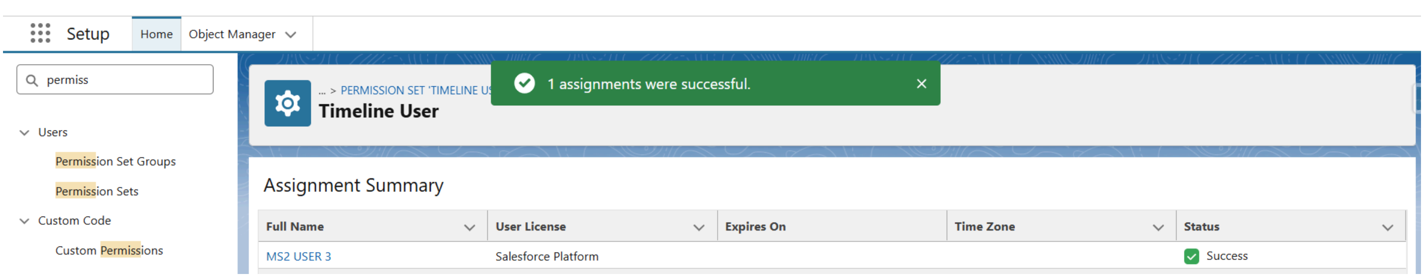
- Common user issues
- Performance optimization
- Support escalation

6. User Management

Assigning Permission Sets

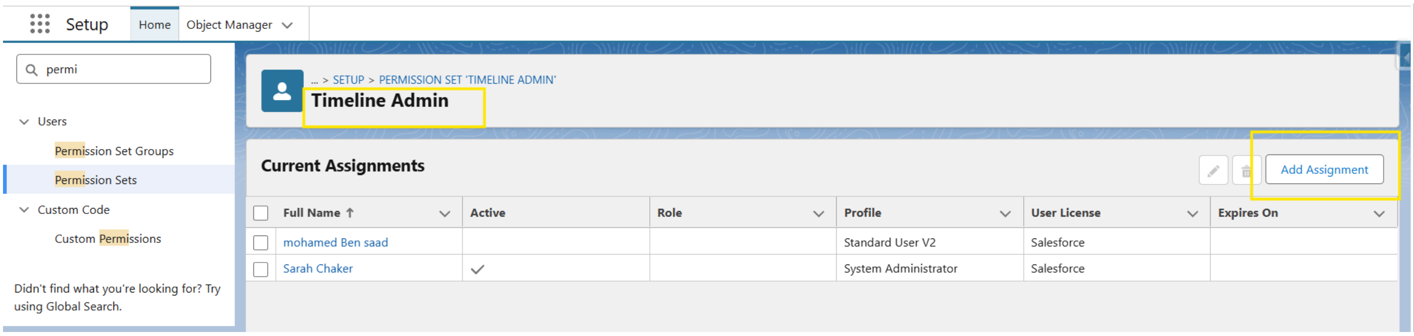
Timeline User (End Users):

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



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

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