

RECORD PRESENCE: USER DOCUMENTATION



APP OVERVIEW

The Lightning page titles for the app 'Record Presence: Who is on my Record' shows users:

1. What other users are viewing or have recently edited a record
2. A history of who has opened the record in the last set number of days

WHAT USERS SEE

Users Viewing this Record (tile: RecordPresence)

Users Viewing this Account Record

- Arty Apps - Last Viewed: 9:38 AM - [Open](#)
- Thistle Apps - Last Viewed: 9:41 AM - [View](#)

Users Viewing this Record shows the list of users who have the record in:

- Open: If the user has clicked open the record
- View: If the user has scrolled down the record (scrolled 200px)
- Update: If the user has saved an edit to the record

Record Viewing History (tile: RecordPresenceHistory)

Record Viewing History		
Name	View Count	Latest View Date
Arty Apps	1	2025-06-04 8:44 AM
Thistle Apps	3	2025-06-04 9:38 AM

Record Viewing History shows:

- The list of users who have opened the record in the last set number of days
- The number of times the users have viewed the record
- The latest view date and time

*See the Settings section below for a definition of how long record view history is stored

DATA STORAGE

The Record Presence App creates records in your Salesforce database when users open, view, or edit a record. This is the data displayed in the tiles above.

This data can either be saved in perpetuity, in which case the Record Viewing History tile will show data since the record was created, or the data can be truncated daily back a set number of days. The amount of days is defined in the settings, outlined in the Settings section below.

Note, data will only be created when a user loads a page that has the ‘Users Viewing this Record’ (API Name: RecordPresence) tile.

INSTALLATION PROCESS

Installing the App

Install the app For Admins Only

Click ‘Install’. This process may take a minute or two, and you will see the installation complete screen.

You will now see the Record Presence package in Setup > Installed Packages.

 **Install RecordPresence**
By Artichoke Consulting LLC


☒ Install for Admins Only


☐ Install for All Users


☐ Install for Specific Profiles...

 Installation Complete!

Done

 [RecordPresence](#)

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The installation process is now complete, and you can continue below to set up permissions and add the Record Presence tiles to Lightning page layouts.

Set up Permissions

Record Presence has two permission sets. Administrators can grant these permission sets to users.

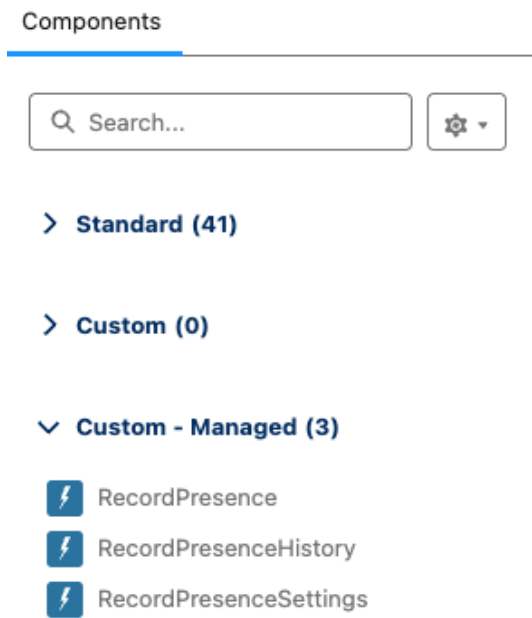
Permission Set	Purpose	Assign To
Record Presence Admin	Access Record Presence Settings	Admins
Record Presence User	Ability to see Record Presence data on page tiles	All users

Adding Lightning Components to Lightning Page Layouts

Record Presence tiles are available on the Lightning page editor under Components > Custom Managed. The components may be added to any Lightning Page layout, including both standard and custom objects.

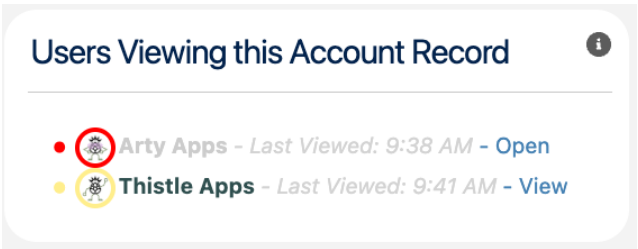
To add the tiles:

- Open the Lightning Page layout editor.
- Click 'Components' and scroll down to the 'Custom - Managed' section

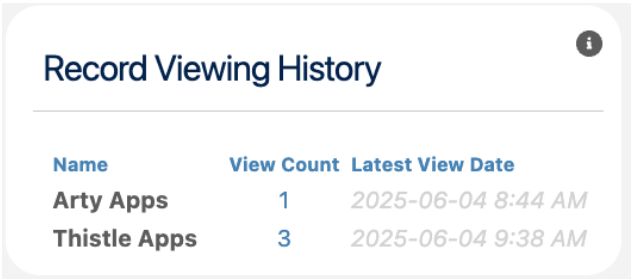


- Drag the components onto the Lightning page. *For optimal user experience, We recommend the components sit in the upper right corner of 2:1 column configuration Lightning pages.*

- The tile 'RecordPresence' shows users currently on the record



- The tile 'RecordPresenceHistory' shows the history of users who have opened this record in the last set number of days. The number of days is set in the settings.



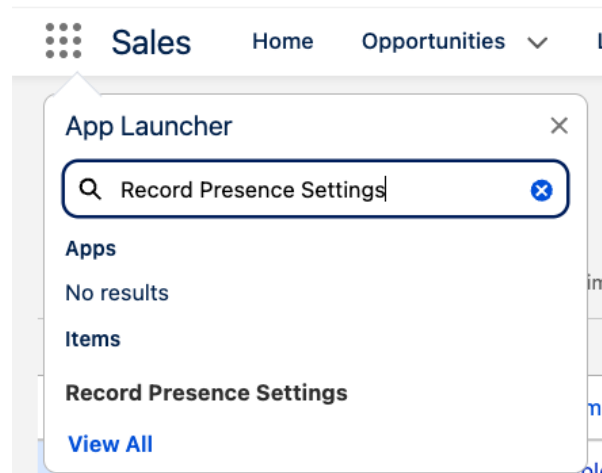
RECORD PRESENCE SETTINGS

Required Permissions

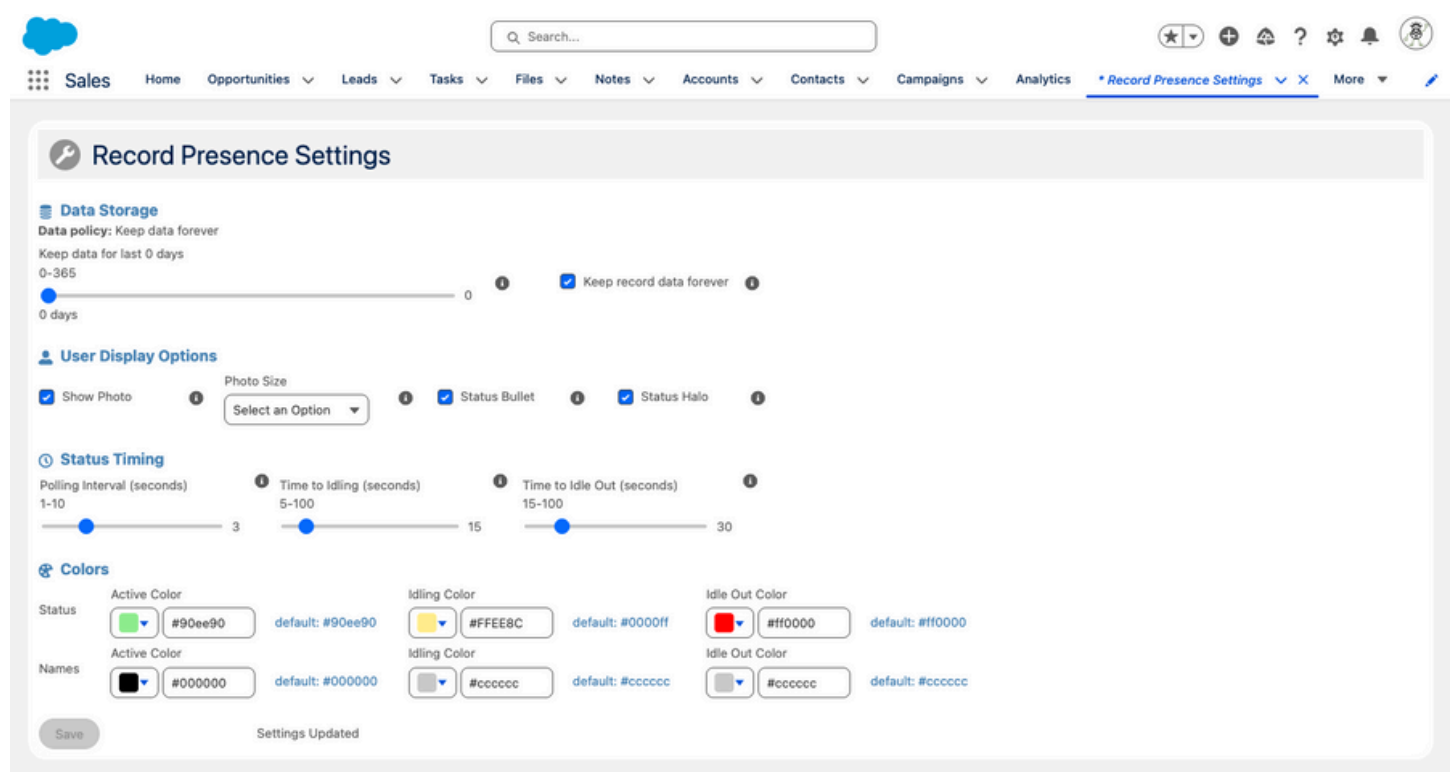
The settings page is available to users who have Permissions Set: Record Presence Admin.

Accessing the Settings

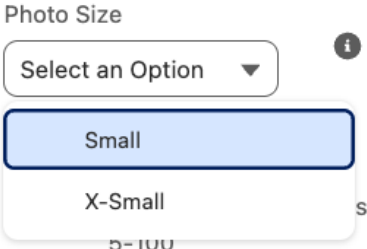
To access the settings, navigate to the 'Record Presence Settings' page through the App Launcher:



Below is a screenshot of the Record Presence Settings page and explanations of each setting.



Setting Definitions

Section	Setting	Definition
Data Storage	Keep data for last X days	The number of days that record open, view, and update data is stored. A job runs nightly to delete data older than the set number of days in this setting. This is also the setting that controls how far back data is available for the Record View History component.
Data Storage	Keep record data forever	If checked, record open, view, and edit data is kept in perpetuity. Note, if your org has a heavy use of Salesforce records this data can grow quickly, in which case we recommend deleting data on an interval set in the Keep data for last X days setting above.
User Display Options	Show Photo	Toggle on/off the user's photo display on the Users Viewing this Record tile: 
User Display Options	Photo Size	If the user's photo is displaying, this is the size of the photo 
User Display Options	Status Bullet	If the user's photo is displaying, this is the size of the photo
User Display Options	Status Bullet	Toggle on/off the bullet displayed on the Users Viewing this Record tile: 
User Display Options	Status Halo	Toggle on/off the halo around the users photo on the Users Viewing this Record tile: 
Status Timing	Polling Interval (seconds)	The number of seconds the database is polled to update the

		Users Viewing this Record tile. For example, if this setting is set to 2 seconds, the tile will poll the database for current user actions every 2 seconds to update the data display. If set to 1 second, the display will be most responsive for users, but the extra polling may affect page performance. We recommend tuning this setting between 1-3 seconds to balance user experience with page performance for your org.
Status Timing	Time to idling (seconds)	The number of seconds the user can be on the page without taking action to show as 'idle'. When the user is idle their status bullet, halo, and name will show in the 'Idling' color defined in the Colors section.
Status Timing	Time to idle out (seconds)	The number of seconds the user can be on the page without taking action to show as 'idled out'. When the user is idled out their status bullet, halo, and name will show in the 'Idling Out' color defined in the Colors section.
Colors	Status - Active Color	The color of the status bullet and halo when the user is active on the page.
Colors	Status - Idling Color	The color of the status bullet and halo when the user is idle on the page. Idle time is set in the Time to Idling setting.
Colors	Status - Idle Out Color	The color of the status bullet and halo when the user has idled out on the page. Idle Out time is set in the Time to Idle Out setting.
Colors	Names - Active Color	The color of the user's name when the user is active on the page.
Colors	Names - Idling Color	The color of the user's name when the user is idle on the page. Idle time is set in the Time to Idling setting.
Colors	Names - Idle Out Color	The color of the user's name when the user has idled out on the page. Idle Out time is set in the Time to Idle Out setting.

Other settings note: If a user is idle on a page for 10 minutes, their name will disappear from the Users on This Record tile.