

RECORD PRESENCE: ADMIN CHECKLIST



INSTALLATION CHECKLIST

Use this checklist to ensure smooth installation and setup of the **Record Presence: Who's on My Record** app in your Salesforce environment.

1. Install the App

- ☐ Go to the AppExchange and initiate the Record Presence app installation
- ☐ Select “**Install for Admins Only**”.
- ☐ Click **Install** and wait for the completion confirmation.
- ☐ Click **Done** to return to your Salesforce org.
- ☐ Verify installation under **Setup > Installed Packages**.

2. Assign Permission Sets

Navigate to **Setup > Permission Sets** and assign:

- ☐ **Record Presence Admin**
 - ☐ Grants access to the settings page
 - ☐ Assign to: Admins only
- ☐ **Record Presence User**
 - ☐ Grants access to view data in tiles on record pages
 - ☐ Assign to: All users who need to see the Record Presence tiles on records

3. Add Lightning Components to Page Layouts

For each object (standard or custom) where Record Presence should be visible:

- ☐ Select the relevant **Lightning Record Page**
- ☐ Under **Components > Custom - Managed**, drag the below tiles onto the page:
 - ☐ ‘RecordPresence’ – shows current users on the record
 - ☐ ‘RecordPresenceHistory’ – shows view history

Recommended Layout Tip:

Place components in the upper-right column of a 2:1 column layout for best visibility.

- ☐ **Save and activate** [if needed] the page layout.

4. Configure App Settings

Access the settings in the **App Launcher > Record Presence Settings** (Record Presence Admin permission set required). The configuration options are below:

- ☐ Data Storage:
 - ☐ Set **number of days** to retain view data
 - ☐ OR check “**Keep data forever**” (not recommended for high-volume orgs; see additional details in the Data Storage in the User Documentation)
- ☐ **User Display Options**
 - ☐ Toggle on/off
 - ☐ Show Photo
 - ☐ Photo Size
 - ☐ Status Bullet
 - ☐ Status Halo
- ☐ **Status Timing**
 - ☐ Set polling interval (1-3 seconds recommended)
 - ☐ Set “Time to Idling” and “Time to Idle Out”
- ☐ **Colors**
 - ☐ Configure colors for:
 - ☐ Active
 - ☐ Idling
 - ☐ Idle Out (status and name display)

5. Test and Verify

- ☐ Navigate to a record where the page has the tiles.
- ☐ Have another user open the same record, or login as a user separately in incognito.
- ☐ Confirm real-time presence appears and status updates appropriately.
- ☐ Refresh the window and confirm the viewing history in the **RecordPresenceHistory** tile.

Notes

- Data only tracks for records **if the ‘Users Viewing the Record’ tile is present** on the page. Objects without this tile present do not collect data for this app.
- User names disappear from the ‘Record Presence’ tile after **10 minutes of inactivity**.
- Consider performance implications when choosing data retention and polling frequency.