

RECORD PRESENCE: FAQ



General Overview

Q: What is Record Presence?

A: Record Presence is a Salesforce Lightning app that shows which users are currently viewing or have recently interacted with a record. It helps improve visibility and collaboration by showing user activity in real time.

Q: What are the two main features of the app?

A: 1. Users Viewing this Record: Displays who currently has the record open, is viewing it (scrolled at least 200px), or has updated it.

2. Record Viewing History: Displays a list of users who have opened the record in the past set number of days, how many times, and the latest access timestamp.

Data & Privacy

Q: Where is the data stored?

A: The data is stored in your Salesforce database whenever a user opens, views, or edits a record with the app tile on it.

Q: How long is data stored?

A: Admins can configure data to be stored:

- For a set number of days (deleted nightly beyond that limit), or
- Forever (which can impact performance for high-volume orgs).

Installation & Setup

Q: How do I install the Record Presence app?

A: 1. Install the app from the AppExchange 'for Admins Only'.

2. Once installed, assign the appropriate permission sets and add the Lightning components to page layouts.

Q: What permission sets are available?

A: Available permission sets include:

- 'Record Presence Admin': Grants access to app settings (for admins).
- 'Record Presence User': Allows users to see Record Presence data on tiles.

Q: How do I add the tiles to a Lightning page?

A: 1. Open the Lightning App Builder.

2. Under “Components > Custom - Managed”, drag:

a. RecordPresence (current viewers)

b. RecordPresenceHistory (viewing history) into your layout, ideally in the upper right of a 2:1 column layout.

Customization & Settings

Q: Where do I access Record Presence settings?

A: Through the App Launcher > ‘Record Presence Settings’ (admin-only access).

Q: What can be customized?

A: Admins can control:

- Data Retention: Set how long data is kept.
- Display Options: Toggle photo, status bullet, halo; adjust photo size.
- Status Timing: Set polling interval, idle times.
- Colors: Customize colors for active, idle, and idle-out states (for names and status indicators).

Q: What happens if a user is idle for too long?

A: After 10 minutes of inactivity, the user’s name disappears from the ‘Users Viewing this Record’ tile.

Performance & Best Practices

Q: What is the recommended polling interval?

A: 1–3 seconds is ideal. Lower intervals improve responsiveness but can affect page performance.

Q: Can I use Record Presence with custom objects?

A: Yes, the components can be added to both standard and custom object Lightning page layouts