



StageLogic Package Installation and Setup

Cloud Partners

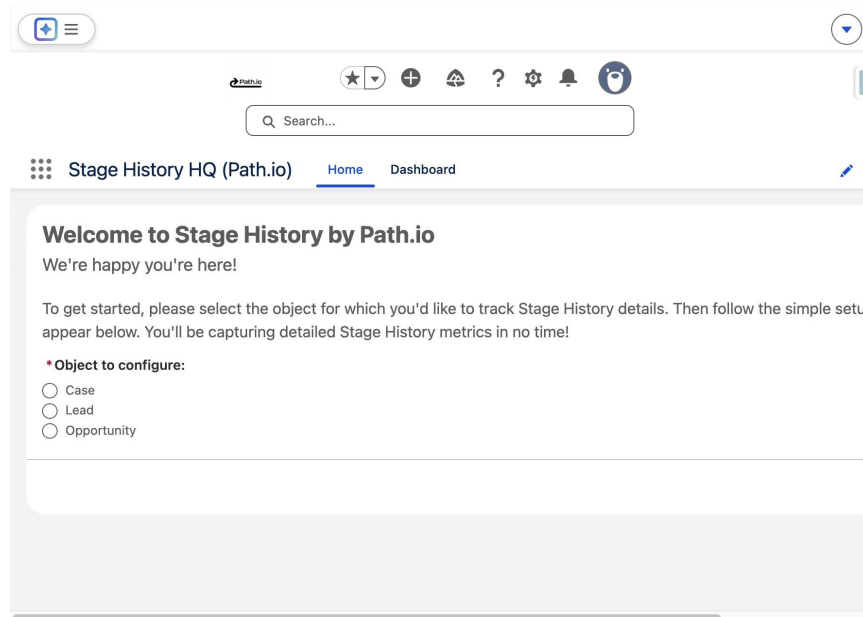
Updated: December 19, 2025

Installation Instructions

1. Install the package [here](#).
2. Select “Install for All Users”

Setup Instructions

1. Once installation is complete, use the App Launcher to navigate to the “Stage History HQ (Path.io)” app.
2. Select the object whose stage/status you’d like to track (the instructions are much the same for each object).



3. Follow the on-screen instructions.
 - a. Activate the flows specific to the object in question (two-flows per object)



Stage History HQ (Path.io) Home Dashboard

Search...

* Object to configure:

☒ Case
☐ Lead
☐ Opportunity

Case Setup

1. Navigate to Setup → Flows
2. Activate the following two flows:
 - a. Path.io | Case Stage History (On Create)
 - b. Path.io | Case Stage History (On Update)
3. Assign the "Path.io - Stage History User" permission set to any user who needs "Read Only" access to Stage History details.
4. Assign the "Path.io - Stage History Admin" permission set to any user who needs "Modify All" access to Stage History details.
5. Add the Stage History related list to the Case lightning page(s) of your choosing. Ensure that you have added the desired fields as columns. We recommend the following:
 - Stage History Name
 - Is Current Stage
 - Time Entered
 - Time Exited
 - Stage Duration (Hours)

Don't forget to check out the "Dashboard" tab above. Feel free to update the dashboard and its underlying reports to meet your needs.

- b. Assign the "Path.io - Stage History User" and "Path.io - Stage History Admin" permission sets to the appropriate user(s).
- i. Path.io - Stage History User grants *Read* and *View All* permission to the path_io__Stage_History__c object.
 - ii. Path.io - Stage History Admin grants *Modify All* permission to the path_io__Stage_History__c object.
- c. Add the path_io__Stage_History__c Dynamic Related List - Single to the Lightning Page(s) of your choosing on the object in question.

Lightning App Builder Pages Case Record Page ? Help

Desktop Shrink To View Activation... Save

Components Fields

Search dyn

Standard (1)
Dynamic Related List

Custom (0)

Custom - Managed (0)

* Fields

Search fields...

Created By
Created By Alias
Created Date
Is Current Stage?
Last Modified By
Last Modified By Alias
Last Modified Date
Lead
Opportunity
Owner Alias

Page > Dynamic Related List - Sin...

☒ Show list view action bar

Related List Fields

Stage History Name

Add Field

* Sort Field

Default

* Sort Order

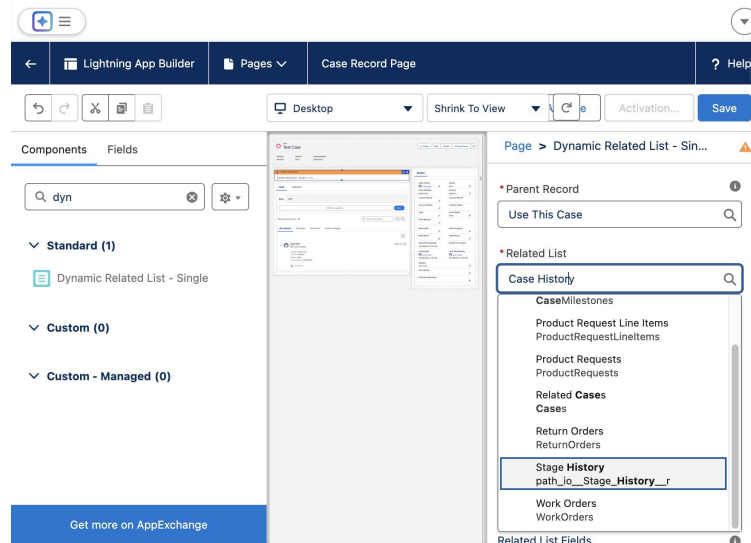
Default

Related List Filters

Add Filter

Actions

d. Add the desired fields to the related list:



e. Save and activate the Lightning Record Page.

4. Test your setup to ensure that a new Stage History record is created any time the Stage/Status is changed on one of your test records.

5. Review the “Path.io Stage History Dashboard” and modify it to meet your needs.

Happy tracking!