

SmartSession Manager – A Configurable App for Salesforce AppExchange

Stay Alert. Stay Secure. Seamless Session Control for Salesforce.

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1. Introduction

The **SmartSession Manager** was built to address Salesforce’s default 15-minute session timeout limitation, which may be insufficient for organizations with strict security and compliance needs.

In industries such as finance, healthcare, government, and other data-sensitive sectors, prolonged idle sessions can pose serious security and compliance risks. SmartSession Manager mitigates these risks by tracking user inactivity in seconds and enforcing customizable timeout policies aligned with organizational or regulatory standards—strengthening data protection without hindering productivity.

Administrators have complete control to define inactivity thresholds, warning prompts, and automatic logout actions. This flexibility helps organizations maintain the ideal balance between security and usability, ensuring that critical systems remain both compliant and user-friendly.

It works across:

- Salesforce Lightning Apps
- Experience Cloud Sites (including Guest Users)

This documentation outlines its **features, configuration options, security considerations, setup steps, and customization ideas**.

2. Installation & Setup

2.1 Prerequisites

Before installing SmartSession Manager, please ensure your org meets the following requirements:

- **Salesforce Edition:** Professional, Enterprise, Performance, Unlimited, or Developer Edition.
- **User Permissions:** You must have the **System Administrator** profile to install the package and configure the component.
- **Experience:** The component is designed for **Lightning Experience** and **Experience Cloud**. It is not supported in Salesforce Classic.

2.2 Step-by-Step Installation from AppExchange

Follow these steps to install the SmartSession Manager in your Salesforce org:

1. Find the App:

- a. Search for **“SmartSession Manager”** in the AppExchange search bar.
 - b. Click on the *SmartSession Manager* listing from the search results.
- 2. Get It Now:**
 - a. On the app listing page, click the **“Get It Now”** button.
- 3. Choose Installation Options:**
 - a. Select **“Install in Production”** to install in your live org, or **“Install in Sandbox”** for testing.
 - b. If prompted, agree to the terms and conditions.
- 4. Approval Screen (Optional):**
 - a. If your org uses an internal package approval process, you may need to submit a request and wait for admin approval.
- 5. Installation Configuration:**
 - a. Choose Security Level:**
 - i. Select **“Install for Admins Only”** for initial testing. You can grant access later via Permission Sets.
 - ii. Select **“Install for All Users”** if you are ready to deploy broadly.
 - b. Click **“Install”** to begin the process.
- 6. Wait for Completion:**
 - a. The installation may take a few minutes. Once complete, you’ll see a confirmation screen.

2.3 Post-Installation Configuration

After successful installation, complete the following steps to enable the app.

Step 1: Assign the Permission Set

The app includes a prebuilt permission set that grants users access to the necessary components.

1. From Setup, go to **Users → Permission Sets**.
2. Click **“SessionTimeoutAccess”**.
3. Select **“Manage Assignments” → “Add Assignments”**.
4. Choose the users or profiles who should use the session timeout feature.
5. Click **“Assign”**.

Important for Experience Cloud: To enable timeout for **Guest Users**, ensure the Guest User profile for your site has equivalent access to the SessionTimeoutAccess permission set. If permission sets can’t be assigned to guest users in your org, manually provide Apex Class and metadata access via profile permissions.

Step 2: Add the Component to a Lightning Page

The SmartSession Manager is a Lightning Web Component (LWC) that must be placed on your Lightning pages.

1. In Setup, open **Lightning App Builder**.
2. Edit the desired **App Page**, **Home Page**, or **Record Page**.
3. In the **Custom Components** section, find **smartSessionManager**.
4. Drag and drop the component onto your page layout.

Best Practice: Place it in a footer or utility area. **Only one instance** is needed per page.

5. Click **Save**, then **Activate** to make the changes live.

Step 3: Configure Session Timeout Settings

Now configure how your timeout warning behaves.

The SmartSession Manager determines which configuration to apply using this order of precedence:

1. **Custom Setting – User Level**
2. **Custom Setting – Profile Level**
3. **Custom Setting – Org Level**
4. **Custom Metadata Type (CMDT) – Default Fallback Record**

This allows fine-grained control, so administrators can define timeout rules per user, profile, or organization, with CMDT acting as the safety fallback when no Custom Setting is found.

Option A: Using Custom Metadata Type (Recommended)

1. Go to **Setup → Custom Metadata Types**.
2. Click **“Manage Records”** next to **Session Timeout Config**.
3. The **Default_Configuration** record provided with the package is **read-only** and serves as a baseline reference.
4. To customize or override the default behavior, click **“New”** to create a new record.
5. Configure the desired values for your org or specific profile (see the *Configuration Fields* section for field definitions).

6. Click **Save**.

Note: Since the default record cannot be edited, always create a new record to apply your own configuration settings.

When multiple CMDT records exist, the configuration with the **highest priority** (based on profile-specific or targeted criteria) takes precedence. If no matching record is found, the **default record** is used as the fallback.

Option B: Using Hierarchy Custom Settings (for user/profile-specific control)

1. Go to **Setup → Custom Settings → Session Timeout Settings → Manage**.
2. To define org-wide defaults, click **New** under *Organization Level*.
3. To define profile- or user-specific settings, click **New** under the relevant section.
4. Enter the configuration values and click **Save**.

Configuration Priority:

The component first checks **user-specific settings**, then **profile-specific**, then **org-level**, and finally falls back to **CMDT** defaults if none exist.

Your **SmartSession Manager** is now installed, configured, and active!

Users will begin receiving inactivity warnings and session timeout prompts as per your defined rules.

3. Features & Functionalities

3.1 Dynamic Configuration

- Settings are first retrieved from **Custom Settings: SessionTimeoutSettings__c**
 - Order of precedence:
 - ♣ **User-level**
 - ♣ **Profile-level**
 - ♣ **Org-level**
- If no matching record is found in Custom Settings, the component **falls back** to **Custom Metadata Type: Session_Timeout_Config__mdt**
 - A default CMDT record with no profile specified acts as the org-level fallback

Users can configure the modal from both Custom Settings and CMDT records. Help text and description fields are available to guide users while entering values.

3.2 Inactivity Monitoring

Tracks user inactivity using browser events:

mousemove, scroll, keypress, click, mousedown, touchstart, wheel, dragstart, mouseenter etc.

3.3 Countdown Timer

Displays a live countdown modal with options to continue the session or log out immediately.

3.4 Custom Styling

Custom styling and messages (colors, titles, button labels, etc.) are fully metadata-driven and brandable.

3.5 Experience Cloud Support

Works seamlessly in Experience Cloud sites, including Guest Users (with configuration).

3.6 Accessible Design

ARIA-compliant design for screen reader and accessibility support.

3.7 Post-Logout Actions

Default logout behavior by redirecting the browser to '/secur/logout.jsp'.

Redirects can be customized as needed.

3.8 Mobile Support

The SmartSession Manager App is fully functional on mobile devices accessing Salesforce via a mobile browser (e.g., Chrome on Android, Safari on iOS).

- **Interaction Tracking:** Taps, swipes, scrolls, and any other touch interactions are detected and reset in the inactivity timer.
- **App Switching:** The timer automatically pauses when the user switches to another mobile app or browser tab, ensuring a fair and accurate inactivity count.
- **Responsive Design:** The warning modal is styled to be responsive and user-friendly on various screen sizes.

4. Security Considerations

4.1 Configuration Lookup Logic

The App checks for timeout configuration in this **priority order**:

1. **Custom Settings – User-level** (most specific)
2. **Custom Settings – Profile-level**
3. **Custom Settings – Org-level**
4. **CMDT** – Default fallback record (no profile)

This allows maximum flexibility for administrators to configure different behaviors for different users/profiles/orgs.

4.2 Required Permissions

A packaged Permission Set named SessionTimeoutAccess is included for convenience. This permission set grants the necessary **Read access** to the required objects and records.

1. **What the Permission Set Includes:**

- Apex Class Access
- SessionTimeoutConfigController
- Custom Metadata Type Access
- Read access to Session_Timeout_Config__mdt
- Custom Setting Access
- Read/Visible access to SessionTimeoutSettings__c

✓ **How to Enable:**

- To activate the session timeout modal for users, simply assign the SessionTimeoutAccess permission set to those users or profiles. This eliminates the need for manual configuration at the profile level.

4.3 Guest User Support

To enable the session timeout modal for Guest Users on Experience Cloud sites, make sure the Guest User Profile is assigned the same SessionTimeoutAccess permission set.

Note: Due to Salesforce limitations, Guest User Profiles cannot be assigned permission sets directly in some orgs. In such cases, you may still need to manually provide the Apex Class and metadata access via Profile settings.

5. How to Use the App

5.1 Add to Lightning Pages

Place the SmartSession Manager App in:

- App Home Page
- Record Pages
- Experience Cloud Templates

Only one instance is needed per page.

5.2 Configure Metadata or Custom Setting Records

Use **CMDT** or **Custom Setting** to define values:

Field	Description	Best Practice
Profile Name	Applies configuration to a specific profile (CMDT only).	Use when different profiles need different rules; leave blank for global default.
User (Custom Setting only)	Applies configuration to a specific User (highest specificity).	Use for pilot/testing; avoid many per-user records for maintainability.
Inactivity Timeout	Seconds of inactivity before the modal appears.	Align with Salesforce Session Settings; 15–30 min is common.
Logout Countdown	Duration of the countdown (in seconds) once the modal is shown.	≥10s for accessibility; 30–60s fits most use cases.
Modal Title	Title text of the timeout warning modal.	Keep short/clear; localize if needed.
Modal Message	Body text of the timeout warning modal.	Plain, instructive language (e.g., “You’ll be logged out in 30 seconds.”).
Button Labels	Labels for action buttons (Continue / Logout).	Use clear verbs; keep consistent with your UI style guide.

Modal Background Color	CSS color for header/body/footer. Supports: <code>rgb()</code> , <code>rgba()</code> , valid CSS color names, hex (<code>#RRGGBB</code> / <code>#RGB</code>), <code>hsl()</code> , <code>hsla()</code> . Does not support gradients.	Use brand colors; ensure contrast for accessibility.
Button Color	Optional override for Continue/Logout button backgrounds.	Differentiate actions (Continue = positive, Logout = neutral/danger).
Static Logo Resource	'LogoUrl' Static Resource holds <code>logoImage</code> is used for the default logo in the modal.	Prefers Static Resources for reliability/versioning; included a fallback image.
Logo URL	Direct URL to a logo image can be used in the modal (e.g., https://.../logo.png).	Use HTTPS on trusted domains; must be registered under CSP Trusted Sites in Salesforce. Keep <200KB; prefer SVG/PNG. If both this and Static Resource exist, Logo URL takes precedence , Static Resource is the fallback.
Post Timeout Action	Action to perform after countdown: logout or redirect.	Defaults to logout. Use redirect for custom logout pages or landing pages.
Redirect URL	Critical Security Field: The URL to redirect to if the action is redirect.	Must be a trusted URL. The component validates this URL against a strict allowlist. See Section 5.3 for details.

- Use field help text and description to guide value input.

5.3 Security: Redirect URL Validation & CSP Trusted Sites

1. The **Redirect URL** field is protected by multiple layers of security validation. A redirect will only happen if the entered URL passes all the security checks.

2. The system allows redirects to:

- URLs that begin with a relative path (for example, `/s/mypage`)
- Standard Salesforce domains such as `.salesforce.com` or `.force.com`
- Domains that are added as **CSP Trusted Sites** in your Salesforce org
- URLs defined in other **trusted configuration records**

Important:

Do not enter external or unverified URLs in the Redirect URL field. Always make sure the destination domain is added as a CSP Trusted Site before using it.

5.4 SmartSession Manager App Scope

The SmartSession Manager App tracks **user inactivity only within the specific browser tab where it is placed.**

1. Interactions such as mouse movement, typing, scrolling, or clicks are counted only in that tab.
2. Switching to another Salesforce tab, browser window, or external application causes the timer to pause. It resumes when the user returns to the tab.
3. Each tab runs its own **independent inactivity countdown.**
4. To enforce true **org-wide session timeout**, admins must also configure Salesforce **Session Settings** in Setup.
5. This component is best used for **page-level/session awareness**, such as a Home Page, Console, or Community landing page.

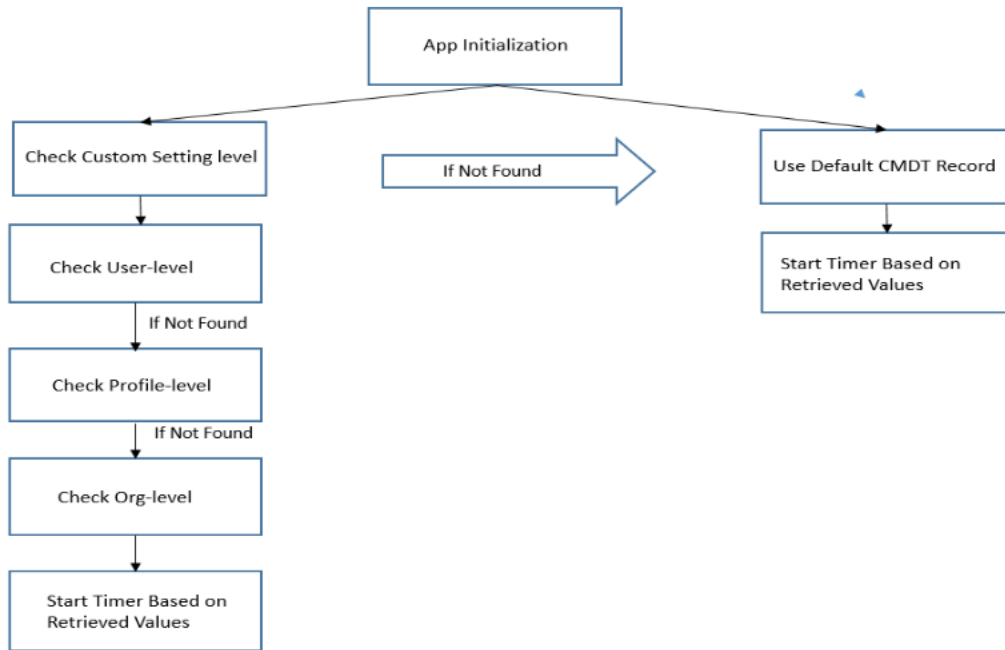
5.5 Use in Day-to-Day Operations

Once configured and added:

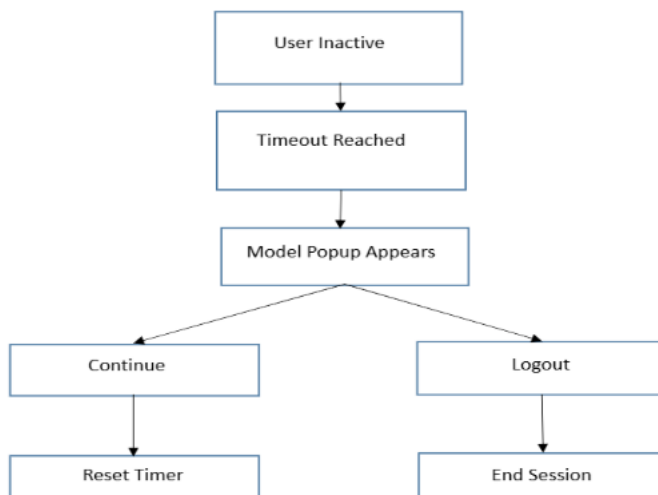
- Users will be alerted after inactivity
- Countdown will trigger modal
- User can either extend session or logout

6. Data Modal

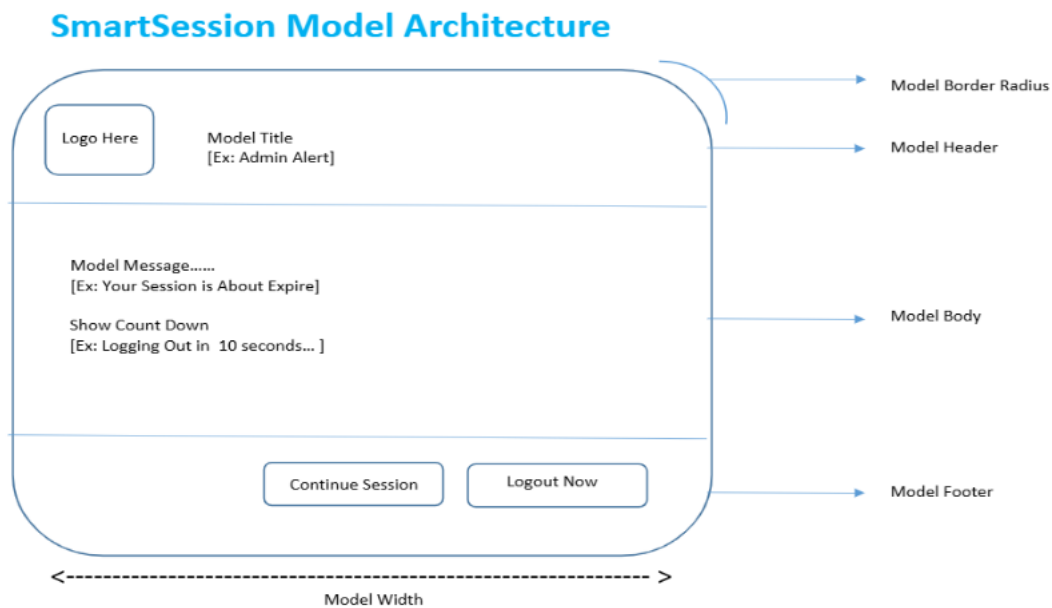
6.1 Configuration Logic Flow



6.2 Timer Interaction



6.3 SmartSession Modal Architecture



6.4 Screenshots

6.4.1 Custom Metadata Type fields to configure

4CE CloudLabs Setup

Search Setup

Setup Home Object Manager

custom meta

Custom Code

Custom Metadata Types

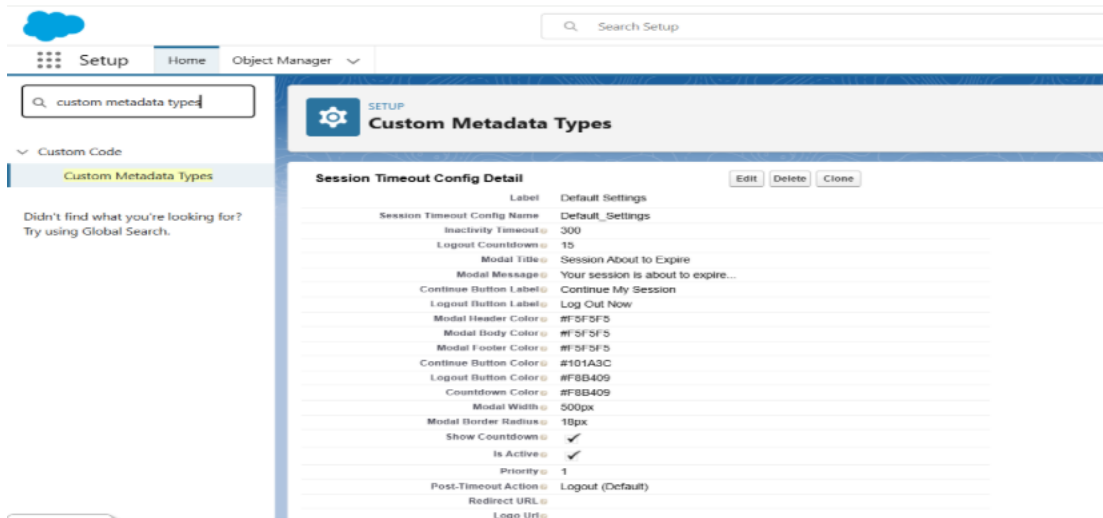
Didn't find what you're looking for? Try using Global Search.

Custom Metadata Types

Custom Fields

Action	Field Label	API Name	Installed Package	Data Type	Field Manageability	Indexed	Controlling Field
Edit	Continue Button Color	FCLabs__Continue_Button_Color__c		Text(50)	Upgradable		
Edit	Continue Button Label	FCLabs__Continue_Button_Label__c		Text(255)	Upgradable		
Edit	Countdown Color	FCLabs__Countdown_Color__c		Text(50)	Upgradable		
Edit	Inactivity Timeout	FCLabs__Inactivity_Timeout__c		Number(18, 0)	Upgradable		
Edit	Is Active	FCLabs__Is_Active__c		Checkbox	Upgradable		
Edit	Logout URL	FCLabs__Logout_URL__c		Text(255)	Upgradable		
Edit	Logout Button Color	FCLabs__Logout_Button_Color__c		Text(50)	Upgradable		
Edit	Logout Button Label	FCLabs__Logout_Button_Label__c		Text(255)	Upgradable		
Edit	Logout Countdown	FCLabs__Logout_Countdown__c		Number(18, 0)	Upgradable		
Edit	Modal Body Color	FCLabs__Modal_Body_Color__c		Text(50)	Upgradable		
Edit	Modal Border Radius	FCLabs__Modal_Border_Radius__c		Text(50)	Upgradable		
Edit	Modal Footer Color	FCLabs__Modal_Footer_Color__c		Text(50)	Upgradable		
Edit	Modal Header Color	FCLabs__Modal_Header_Color__c		Text(50)	Upgradable		
Edit	Modal Message	FCLabs__Modal_Message__c		Long Text Area(32768)	Upgradable		
Edit	Modal Title	FCLabs__Modal_Title__c		Text(255)	Upgradable		
Edit	Modal Width	FCLabs__Modal_Width__c		Text(50)	Upgradable		
Edit	Post Timeout Action	FCLabs__Post_Timeout_Action__c		Picklist	Upgradable		
Edit	Priority	FCLabs__Priority__c		Number(3, 0) (Unique)	Upgradable	✓	
Edit	Redirect URL	FCLabs__Redirect_URL__c		URL(255)	Upgradable		
Edit	Show Countdown	FCLabs__Show_Countdown__c		Checkbox	Upgradable		

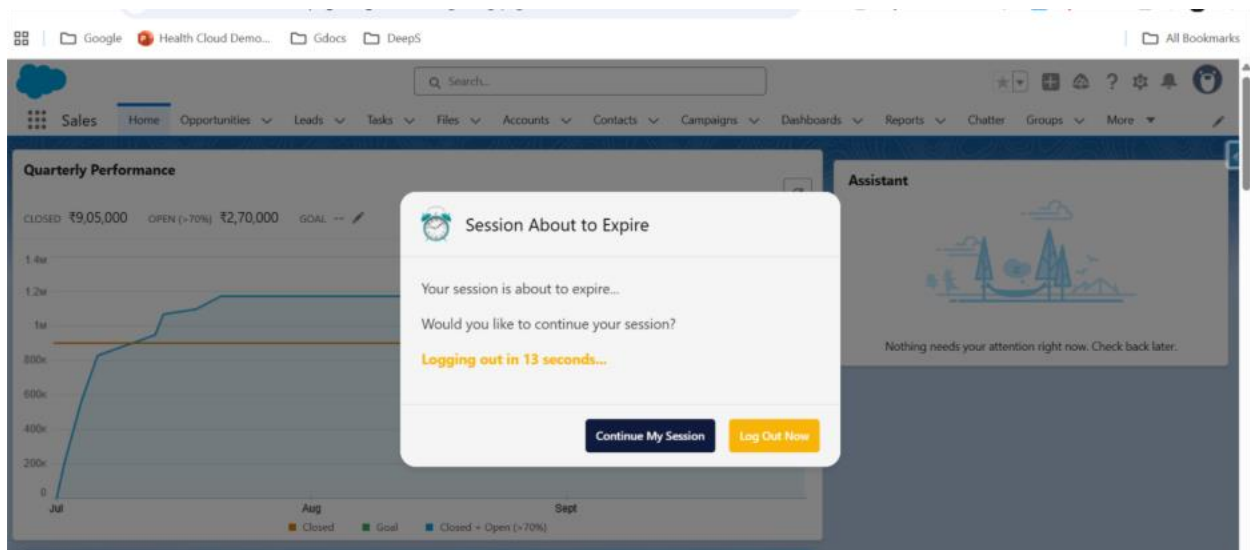
6.4.2 Default CMDT Record



The screenshot shows the 'Custom Metadata Types' configuration page in the SmartSession Manager Setup interface. The left sidebar contains a search bar with 'custom metadata type' and a list of categories including 'Custom Code' and 'Custom Metadata Types'. The main content area is titled 'Session Timeout Config Detail' and includes 'Edit', 'Delete', and 'Clone' buttons. Below this is a table of configuration settings.

Label	Default Settings
Session Timeout Config Name	Default_Settings
Inactivity Timeout	300
Logout Countdown	15
Modal Title	Session About to Expire
Modal Message	Your session is about to expire...
Continue Button Label	Continue My Session
Logout Button Label	Log Out Now
Modal Header Color	#F3F5F5
Modal Body Color	#F3F5F5
Modal Footer Color	#F3F5F5
Continue Button Color	#101A3C
Logout Button Color	#F8B409
Countdown Color	#F8B409
Modal Width	500px
Modal Border Radius	18px
Show Countdown	☒
Is Active	☒
Priority	1
Post-Timeout Action	Logout (Default)
Redirect URL	
Logo Url	

6.4.3 Default SmartSession Popup Appearance



The screenshot shows a web application interface with a 'Quarterly Performance' chart and an 'Assistant' sidebar. A modal popup titled 'Session About to Expire' is displayed in the center. The popup contains the following text and buttons:

Session About to Expire

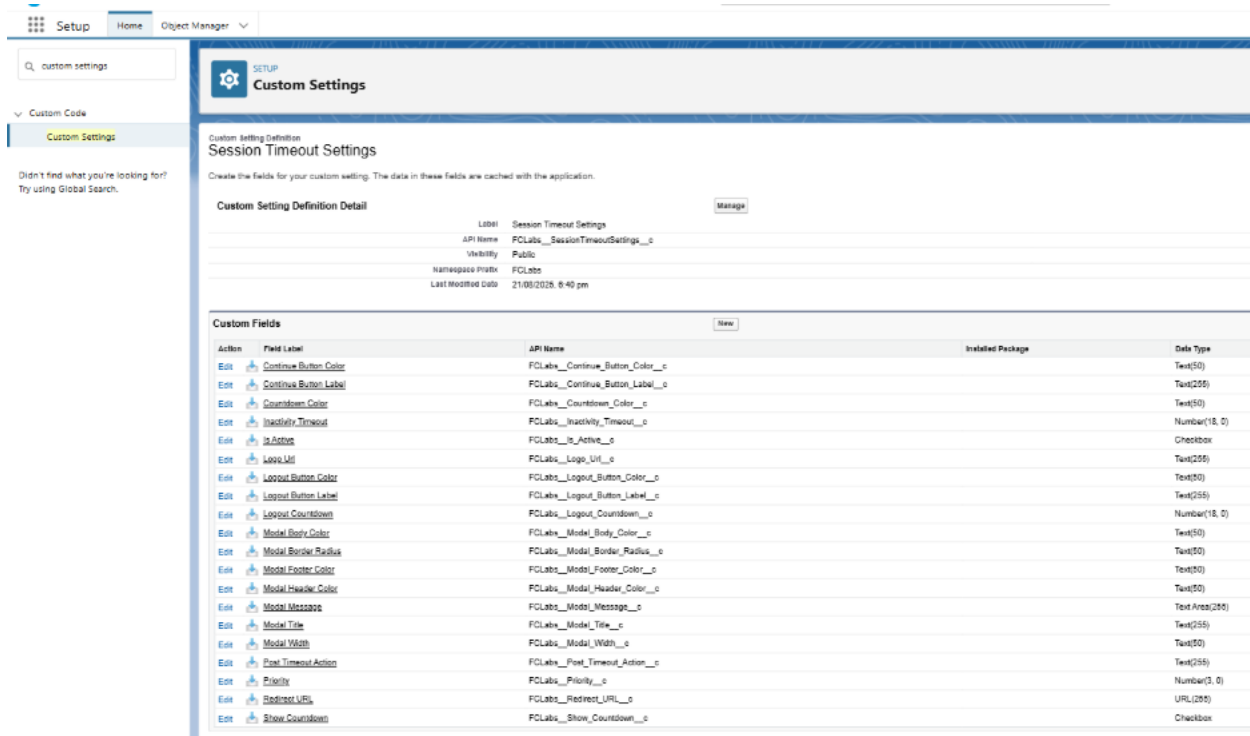
Your session is about to expire...

Would you like to continue your session?

Logging out in 13 seconds...

Continue My Session **Log Out Now**

6.4.4 Custom Settings - Session Timeout Settings fields to configure



The screenshot shows the 'Custom Settings' page in the SmartSession Manager. The 'Session Timeout Settings' section is active, displaying a 'Custom Setting Definition Detail' table and a 'Custom Fields' table.

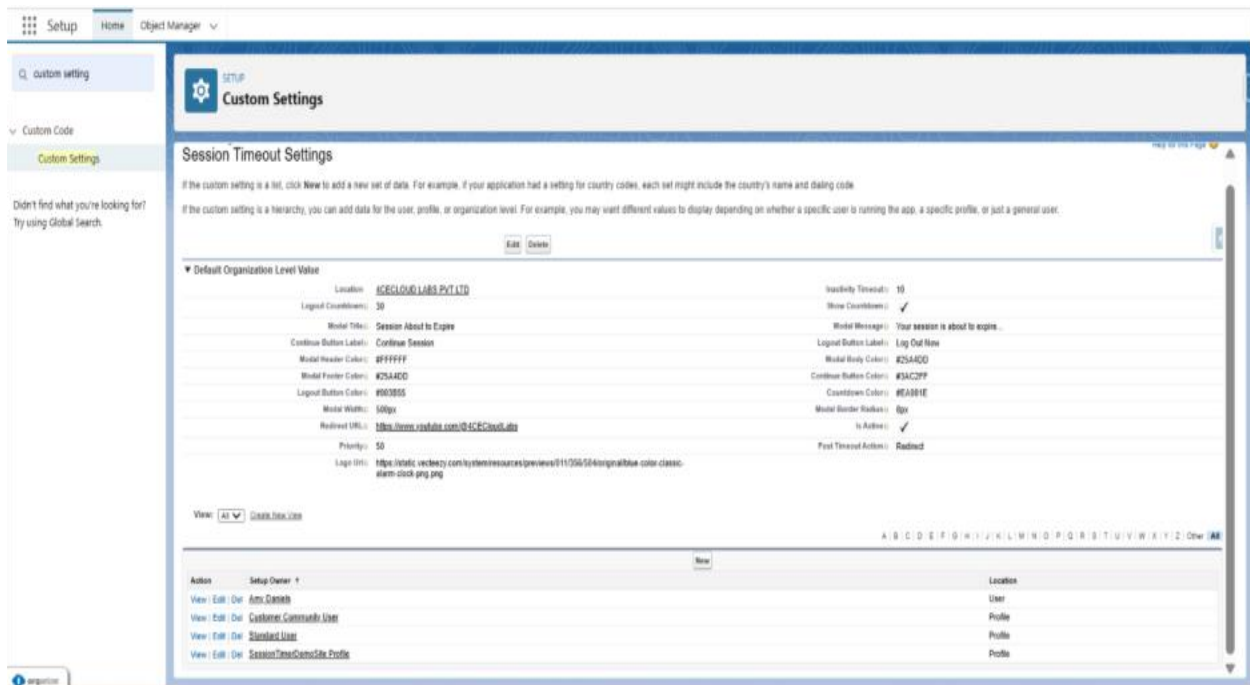
Custom Setting Definition Detail

Label	Session Timeout Settings
API Name	FC Labs_SessionTimeoutSettings__c
Visibility	Public
Namespace Prefix	FC Labs
Last Modified Date	21/08/2025, 8:40 pm

Custom Fields

Action	Field Label	API Name	Installed Package	Date Type
Edit	Continue Button Color	FC Labs_Continue_Button_Color__c		Text(50)
Edit	Continue Button Label	FC Labs_Continue_Button_Label__c		Text(255)
Edit	Countdown Color	FC Labs_Countdown_Color__c		Text(50)
Edit	Inactivity Timeout	FC Labs_Inactivity_Timeout__c		Number(18, 0)
Edit	Is Active	FC Labs_Is_Active__c		Checkbox
Edit	Logo Url	FC Labs_Logo_Url__c		Text(255)
Edit	Logout Button Color	FC Labs_Logout_Button_Color__c		Text(50)
Edit	Logout Button Label	FC Labs_Logout_Button_Label__c		Text(255)
Edit	Logout Countdown	FC Labs_Logout_Countdown__c		Number(18, 0)
Edit	Model Body Color	FC Labs_Model_Body_Color__c		Text(50)
Edit	Model Border Radius	FC Labs_Model_Border_Radius__c		Text(50)
Edit	Model Footer Color	FC Labs_Model_Footer_Color__c		Text(50)
Edit	Model Header Color	FC Labs_Model_Header_Color__c		Text(50)
Edit	Model Message	FC Labs_Model_Message__c		Text Area(255)
Edit	Model Title	FC Labs_Model_Title__c		Text(255)
Edit	Model Width	FC Labs_Model_Width__c		Text(50)
Edit	Post Timeout Action	FC Labs_Post_Timeout_Action__c		Text(255)
Edit	Priority	FC Labs_Priority__c		Number(3, 0)
Edit	Redirect Url	FC Labs_Redirect_Url__c		URL(255)
Edit	Show Countdown	FC Labs_Show_Countdown__c		Checkbox

6.4.5 Custom Settings – Org level, profile level, User level records configured.



The screenshot shows the 'Custom Settings' page with the 'Session Timeout Settings' section. The 'Default Organization Level Value' is configured for the '4CECLOUD LABS PVT LTD' organization.

Default Organization Level Value

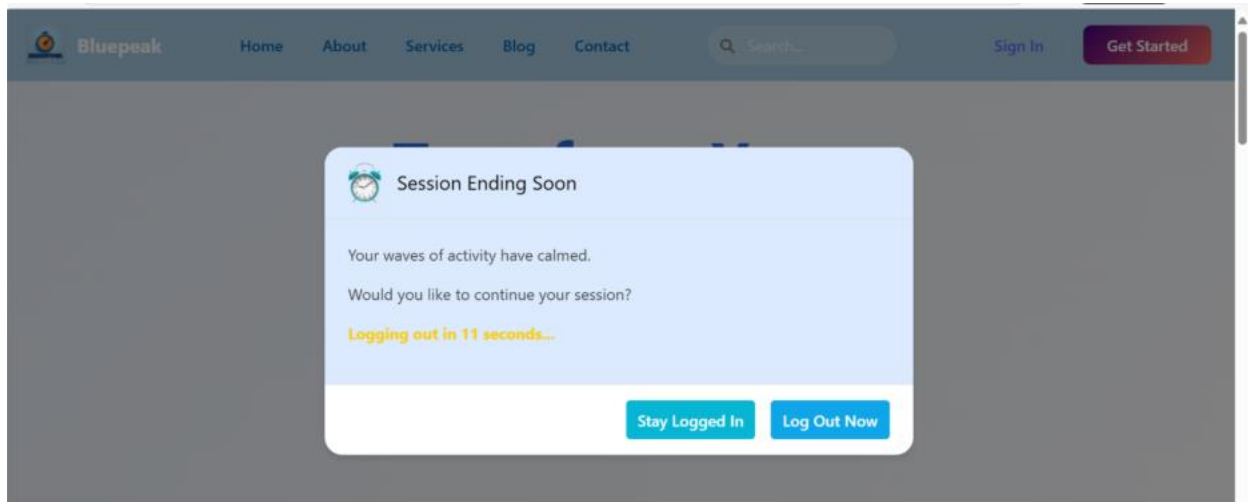
Location	4CECLOUD LABS PVT LTD	Inactivity Timeout	15
Logout Countdown	30	Show Countdown	☒
Model Title	Session About to Expire	Model Message	Your session is about to expire...
Continue Button Label	Continue Session	Logout Button Label	Log Out Item
Model Header Color	#FFFFFF	Model Body Color	#2540D0
Model Footer Color	#2540D0	Continue Button Color	#3AC2FF
Logout Button Color	#003366	Countdown Color	#E6913E
Model Width	50px	Model Border Radius	0px
Redirect URL	https://www.vivaldi.com/@4CECloudLabs	Is Active	☒
Priority	50	Post Timeout Action	Redirect
Logo Url	https://static.vectorcy.com/systemresources/previews/011750504imgprblue_color_classic_alarm-clock.png.png		

View: All | Details | Data | New

Table:

Action	Setup Owner	Location
View Edit Del	Admin User	User
View Edit Del	Customer Community User	Profile
View Edit Del	Standard User	Profile
View Edit Del	SessionTimeoutSettings Profile	Profile

6.4.6 Custom Settings – For Experience Site [Guest Users]



7. Licensing & Pricing Information

- **Free App**
- No licensing or subscriptions
- Can be used across org and guest sites without restrictions

8. Troubleshooting Tips

Issue	Suggested Fix
Modal not showing	CMDT/Custom Setting not configured or no matching record
Immediate logout	Timeout value too low or config not fetched, permission set not assigned.
Guest user not working	Guest check logic blocking execution, check Guest user access
Button or modal styling off	Invalid CSS/hex values, color names in metadata/settings configuration.
Logo missing	Incorrect logo URL or Source URL might not register under Trusted URL or permission issue.
Redirect to external URL doesn't work, defaults to logout.	The external domain is not registered as a CSP Trusted Site. See Section 5.3 for configuration steps.

9. Uninstallation Guide

- To completely remove SmartSession Manager from your Salesforce org, follow these steps:
- **Remove the Component from All Pages:**
 - Use **Lightning App Builder** to remove the smartSessionManager component from all Lightning Pages, App Pages, Home Pages, and Experience Cloud templates.
- **Remove Permission Set Assignments:**
 - Navigate to **Setup → Users → Permission Sets**.
 - Click **SessionTimeoutAccess**, then select **Manage Assignments**.
 - Choose all assigned users and click **Remove**.
- **(Optional) Delete Configuration Data:**
 - Delete any custom configuration records you created in **Custom Metadata Types** (Session_Timeout_Config__mdt) or **Hierarchy Custom Settings** (SessionTimeoutSettings__c).
- **Uninstall the Package:**
 - Go to **Setup → Platform Tools → Apps → Packages → Installed Packages**.
 - Locate **SmartSession Manager**, click **Uninstall**, and follow the prompts to complete removal.
 - This process permanently deletes all packaged components from your org.

10. Release Notes

10.1 Version 1.0

- **Release Date:** Nov 4, 2025
- **Summary:**
 - Initial release of SmartSession Manager.
 - Configurable session timeout warning modal for user inactivity.
 - Supports both **Custom Metadata Types** and **Hierarchy Custom Settings** for flexible configuration.
 - Full compatibility with **Lightning Experience** and **Experience Cloud (including Guest Users)**.
 - **Mobile-responsive** design for tablets and smartphone browsers.
 - Enhanced **redirect URL security validation** to prevent unauthorized redirects.
 - Accessibility-compliant modal interface for inclusive user experience.

11. Contact & Support

- **Email:** consulting@forcecloudlabs.com
- **Support Hours:** Monday to Friday, 10AM to 7PM (IST)
- **Response SLA:** Within 1–2 business days