Activity Timeline
User Guide

Version 1.0
October 2025

Developed by MS² Technologies

For Salesforce Users

Compatible With: Lightning Experience

Contact Information

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Document Purpose

This User Guide offers comprehensive guidance on how to use the Activity Timeline application within Salesforce. It is designed for Salesforce end users to help them manage and track their activities effectively.

About MS² Technologies

MS² Technologies is a leading Salesforce ISV partner specializing in productivity and visualization solutions for the Salesforce platform. The Activity Timeline application represents our commitment to helping organizations gain better visibility into their customer interactions and business processes through innovative, user-friendly solutions.

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1. Introduction

1.1 What is the Activity Timeline?

Activity Timeline

Activity Timeline is a visual component that displays all your activities, interactions, and events in chronological order on a single screen. Instead of clicking through multiple tabs and related lists, you can see everything in one place.

What You'll See:

- Scheduled meetings and events
- Tasks and to-dos
- Emails
- Phone call logs
- Business records (Opportunities, Cases, Quotes, etc.)
- Custom activities specific to your organization

1.2 Why Use Activity Timeline?

Save Time:

- No more clicking between tabs
- Find information instantly
- See all context in one view

Stay Organized:

- View activities chronologically
- Filter by date, type, or owner
- Track what's upcoming and overdue

Better Collaboration:

- See what your teammates are doing
- Understand complete customer history
- Prepare better for meetings

1.3 Where to Find Timeline

Your administrator has added the Activity Timeline to specific record pages. You'll typically find it on:

- **Account pages** - Customer interaction history
- **Contact pages** - Individual communication timeline
- **Opportunity pages** - Sales cycle activities
- **Case pages** - Support interaction history
- **Custom object pages** - Department-specific records

Look for the timeline section on the record detail page, usually in the main content area.

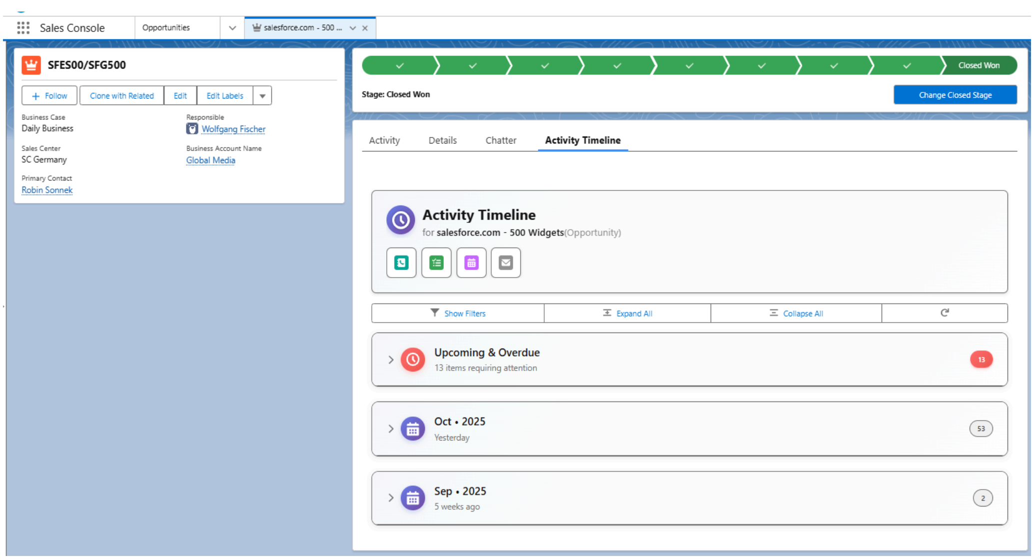
2. Getting Started

2.1 Accessing Your First Timeline

Step 1: Open a Record

1. Navigate to any Account, Contact, Opportunity, or other configured object
2. Click to open the record detail page
3. Scroll down to find the "Activity Timeline" section

Step 2: Understand the Layout



Key Elements:

1. **Context Header** - Shows which record you're viewing
2. **Quick Action Buttons** - Create new activities quickly
   - 📞 Log a Call
   - 📝 Create Task
   - 📅 Schedule Event
   - ✉️ Send Email
3. **Control Bar** - Tools to manage your view
   - Show Filters
   - Expand All / Collapse All
   - Refresh button
4. **Upcoming & Overdue** - Important items requiring attention
5. **Monthly Sections** - Activities grouped by month

2.2 Your First Look

Click the arrow (▸) next to any month to expand and see activities:

▼ For example: October 2025 (12 activities)

📅 Oct 28 - Product Demo Meeting
Status: Completed | Owner: Sarah Johnson
Location: Zoom | Duration: 1 hour

✉️ Oct 27 - Proposal Follow-up Email
From: john.smith@company.com
To: client@customer.com
Subject: Re: Q4 Proposal Review

📝 Oct 25 - Prepare quarterly review
Status: In Progress | Priority: High
Due: Oct 30, 2025

Click on any activity title to open the full record and see all details.

2.3 Display Modes

Compact View (Default)

- Shows key fields
- Best for quick scanning
- Conserves screen space

Expanded View

- Shows all detail fields
- Click arrow (▸) to expand individual activities
- Click "Expand All" to open everything at once

Tip: Use "Collapse All" when you're done reviewing details to return to compact view.

3. Navigating the Timeline

3.1 Viewing Activity Details

Each activity shows:

Primary Information:

- Icon indicating activity type
- 1st key field
- 2nd key field

Secondary Information (when expanded):

- Status or stage
- Priority level
- Related records
- Description or notes
- Additional custom fields

To View More:

- **Click the arrow (→)** to expand/collapse details
- **Click the title** to open full record

3.2 Activity Actions

Available actions depend on your permissions:

Edit (✏️ Pencil icon)

- Modify activity details
- Update status or priority
- Change dates or assignments

Delete (🗑️ Trash icon)

- Remove the activity
- Requires confirmation

- Cannot be undone

Open (Click title)

- View full record page
- Access all fields and related information
- See complete record history

3.3 Understanding Activity Types

Standard Activities:

📧 **Email**

- Email messages
- Subject and preview
- Date sent/received
- Sender and recipients

📅 **Event**

- Meetings and appointments
- Location and duration
- Attendees
- Start and end time

📝 **Task**

- To-dos and action items
- Due date and priority
- Assignment and status
- Related records

📞 **Call**

- Phone call logs
- Duration and outcome
- Call notes
- Participants

Business Records Example:

💼 **Opportunity**

- Deal progression
- Stage changes
- Amount updates
- Win/loss records

🎫 **Case**

- Support tickets
- Status changes
- Resolution notes
- Escalations

📄 **Quote**

- Proposals sent
- Pricing changes
- Approval status

Your organization may display additional custom activity types with custom fields.

3.4 Timeline Organization

Monthly Grouping:

- Activities organized by month
- Shows count of activities per month
- Expand/collapse entire months
- Quick navigation to specific periods

Chronological Order:

- Most recent first (default)
- Or oldest first (change in filters)
- Within each day, sorted by time

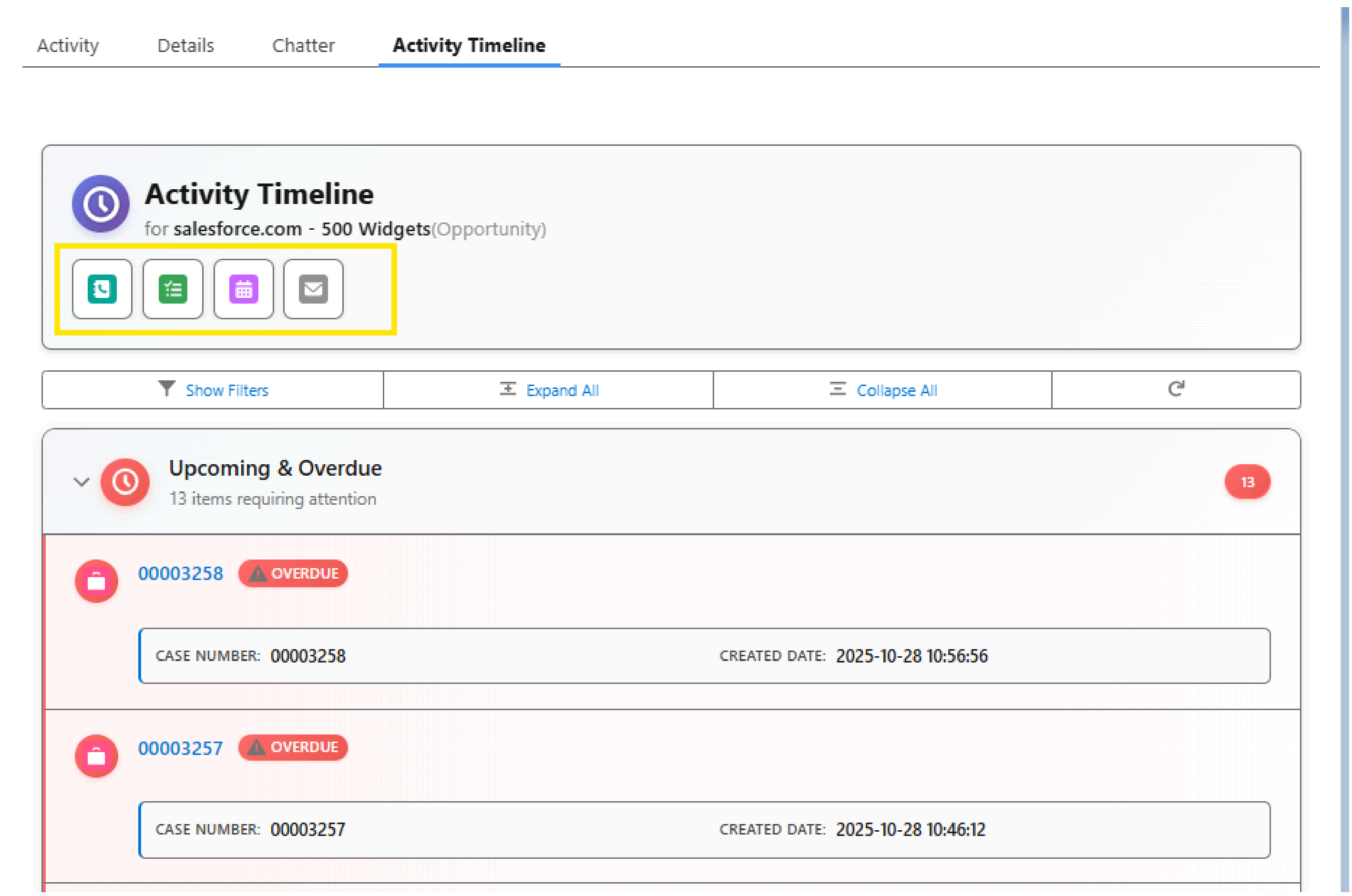
Upcoming & Overdue Section:

- Always visible at top
- Red badge shows count
- Prioritized by urgency
- Includes:
  - Overdue tasks
  - Today's activities
  - Tomorrow's deadlines
  - This week's events

4. Working with Activities

4.1 Creating New Activities

Quick Create Buttons (Top of timeline):



📞 Log a Call

1. Click phone icon
2. Enter call details:
   - Subject (e.g., "Discussed Q4 budget")
   - Duration
   - Call notes
   - Outcome
3. Link to related record (pre-filled)
4. Click "Save"

📝 Create Task

1. Click task icon
2. Fill in:

    - Subject (what needs to be done)
    - Due date
    - Priority (High/Normal/Low)
    - Assignment (yourself or teammate)
    - Status (Not Started/In Progress)
    - Description
3. Click "Save"

📅 Schedule Event

1. Click calendar icon
2. Enter:
    - Subject (meeting title)
    - Start date and time
    - End date and time
    - Location (or video link)
    - Attendees
    - Description
3. Click "Save"

✉️ Send Email

1. Click email icon
2. Compose:
    - To/CC/BCC
    - Subject
    - Email body
    - Attachments
3. Click "Send"

4.2 Updating Activities

Edit an Activity:

1. Find the activity in timeline
2. Click edit icon (✏️)
3. Modify fields as needed
4. Click "Save"

Common Updates:

- Mark task as complete
- Change event time
- Update priority
- Add notes or comments
- Reassign to another user

Quick Status Changes:

- Some activities allow quick status updates
- Click status field directly
- Select new status from dropdown
- Saves automatically

4.3 Deleting Activities

To Remove an Activity:

1. Click delete icon (🗑️)
2. Confirm deletion
3. Activity is permanently removed

Important Notes:

- Cannot undo deletion
- Removed from all related records
- Audit log maintained (if enabled)
- May require special permissions

4.4 Best Practices for Creating Activities

DO:

Be Descriptive

- "Follow up on Q4 pricing proposal"
- "Follow up"

Add Context

- Include relevant details in description
- Link to related documents
- Mention key discussion points

Set Due Dates

- Always add deadlines for tasks
- Schedule events with actual times
- Use reminders for important items

Use Priority Wisely

- High: Urgent, business-critical

- Normal: Standard work items
- Low: Nice to have, when time allows

Update Status

- Mark tasks complete when done
- Update event outcomes after meetings
- Add notes with results or next steps

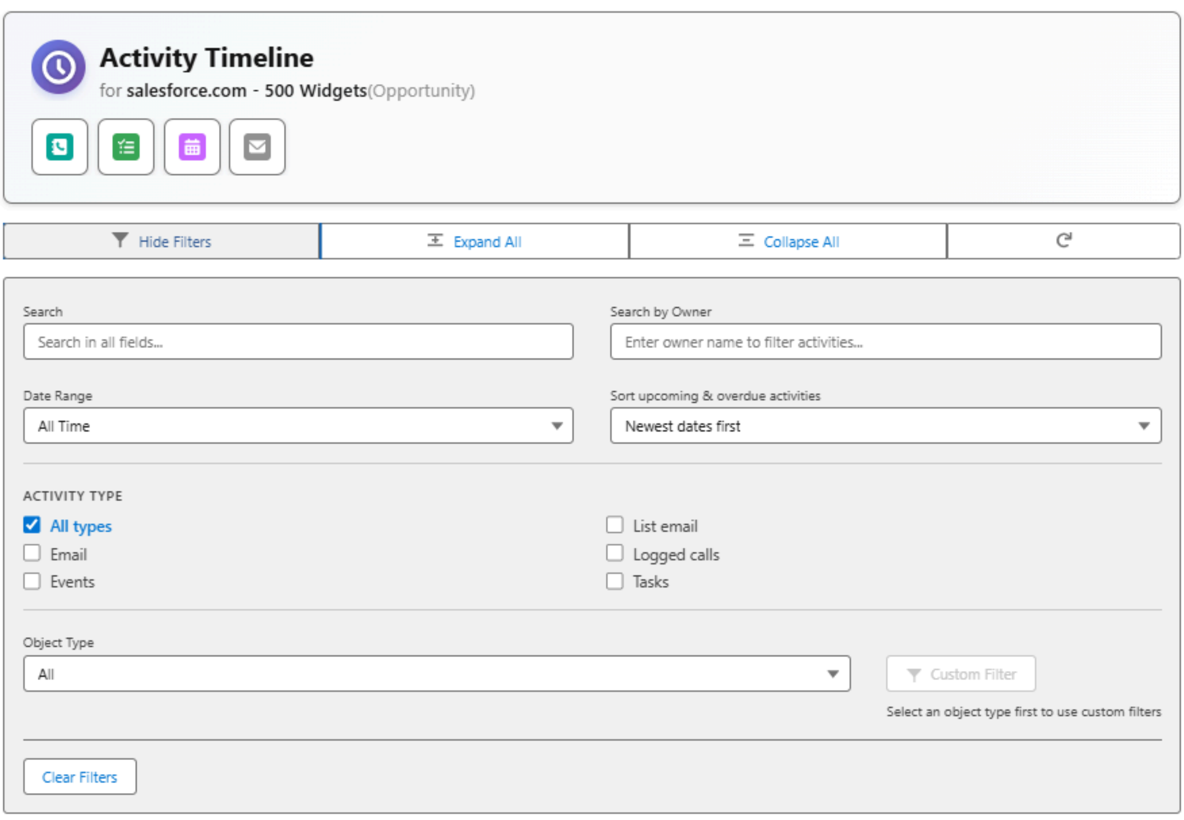
AVOID:

- Vague subjects like "Call" or "Meeting"
- Tasks without due dates
- Creating duplicate activities
- Putting sensitive information in titles
- Leaving activities incomplete

5. Filters and Search

5.1 Opening Filter Panel

Click **"Show Filters"** button at top of timeline to open full filter panel.



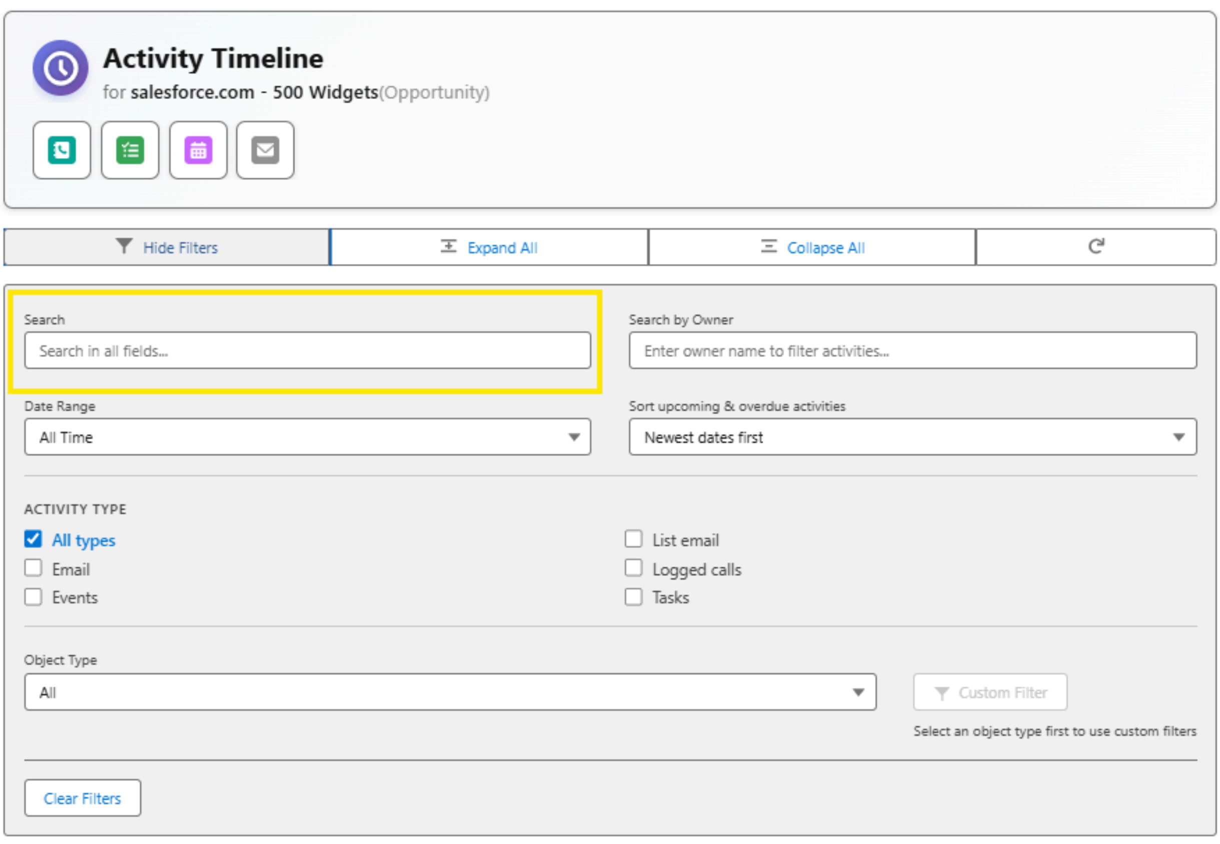
Filter Panel Sections:

1. Text Search
2. Date Range
3. Sort Order
4. Activity Types
5. Object Types
6. Custom Filters

5.2 Text Search

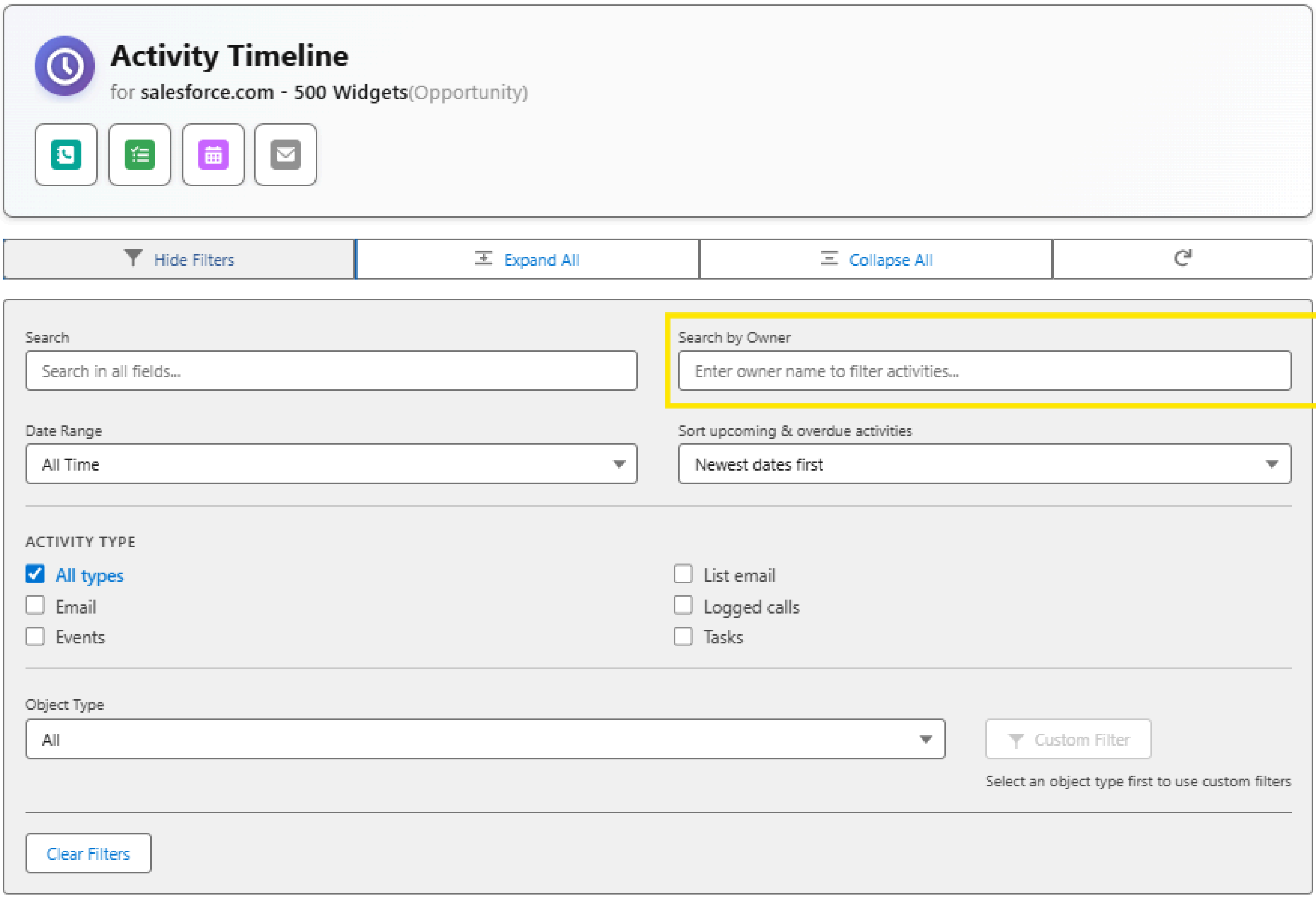
Search All Fields:

1. Click in "Search in all fields..." box
2. Type your keyword
   - Names
   - Subjects
   - Descriptions
   - Any text in activities
3. Results filter instantly as you type
4. Matching terms are highlighted



Search by Owner:

1. Use "Enter owner name to filter" field
2. Start typing a name
3. Select from suggestions
4. See only that person's activities



Search Tips:

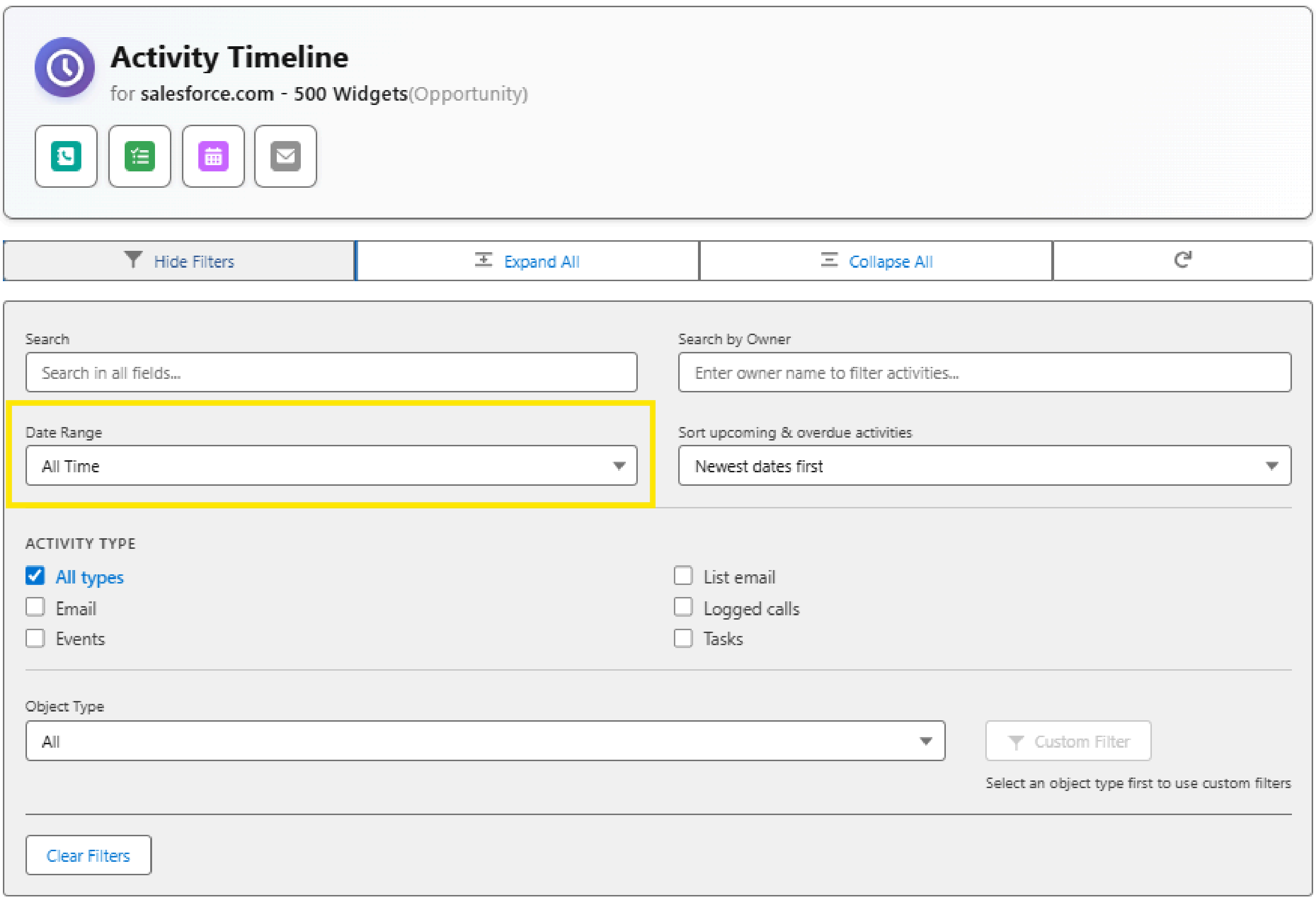
- Use specific keywords ("budget" not "meeting")
- Try partial matches ("prop" finds "proposal")
- Search is case-insensitive
- Includes all visible fields

5.3 Date Filtering

Select Date Range:

Preset Ranges:

- **All Time** - Everything (default)
- **Last 7 days** - Recent activity
- **Next 7 days** - Upcoming week
- **Last 30 days** - This month
- **1 year ago** - Historical view
- **2-5 years ago** - Deep history



Practical Uses:

- **Last 7 days** - Weekly review
- **Next 7 days** - Planning ahead
- **Last 30 days** - Monthly retrospective
- **Custom** - Specific project timeframe

5.4 Sorting Options

Sort Upcoming & Overdue:

Newest First (Default)

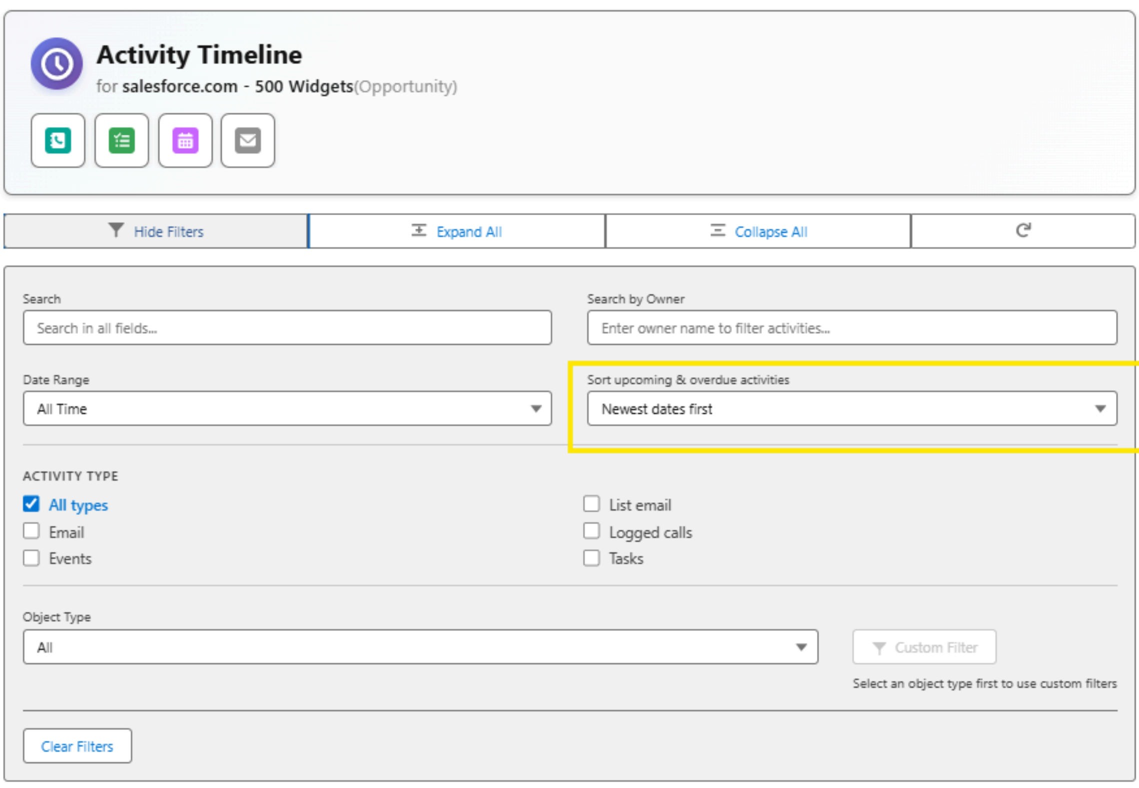
- Most recent at top
- Latest updates first
- Best for staying current

Oldest First

- Earliest at top
- See activity progression
- Good for project timelines
- Helpful for handovers

Change Sort:

1. Open filters
2. Select sort option
3. Timeline reorganizes automatically



5.5 Activity Type Filters

Standard Types:

All Types - Check/uncheck all at once

Individual Types:

- ☐ Email
- ☐ Events
- ☐ Logged Calls
- ☐ Tasks

Business Objects:

- (As configured by your admin)

Custom Objects:

- (As configured by your admin)

How to Use:

1. Uncheck types you don't need
2. Timeline updates in real-time
3. Useful for focusing on specific work

Examples:

- View only **Emails** before client call
- Check **Tasks** for weekly planning
- Review **Cases** for support summary
- See **Opportunities** for sales review

5.6 Object Type Filters

Filter by Specific Object:

All Objects (Default)

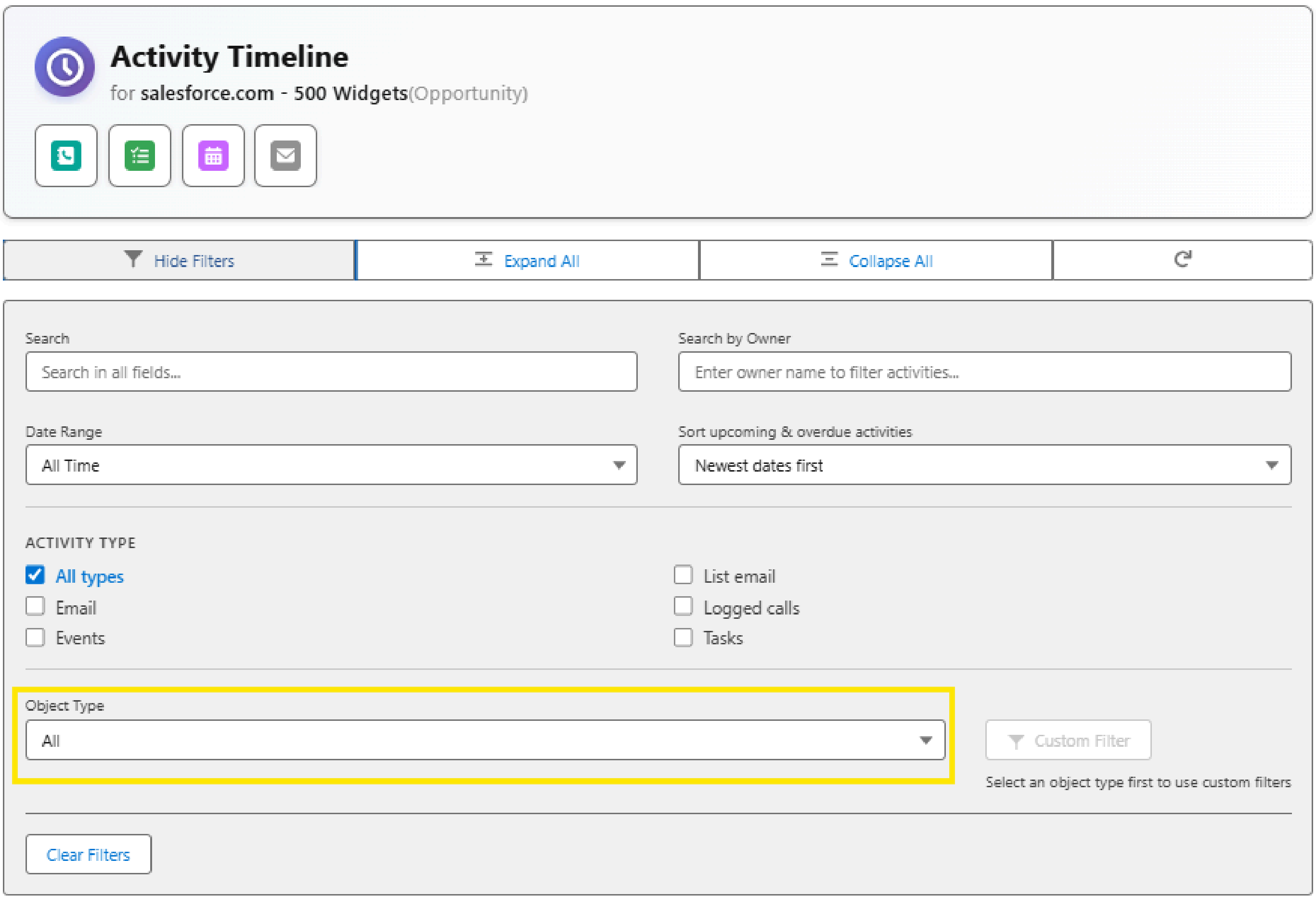
- Shows everything
- Complete view

Specific Object

- Choose one object type
- See only those records
- Example: "Show only Opportunities"

Custom Filters (Advanced)

1. Select object type first
2. Click "Custom Filter"
3. Define criteria:
   - Field to filter
   - Operator (equals, contains, etc.)
   - Value
4. Apply filter



Use Cases:

- View high-priority tasks only
- See open cases
- Check opportunities over $50K
- Review urgent emails

5.7 Combining Filters

Create Powerful Views:

Example 1: This Week's Emails from Manager

- Date: Last 7 days
- Type: Email only
- Owner: [Manager's name]

Example 2: Overdue High-Priority Tasks

- Date: All time
- Type: Tasks
- Custom: Priority = High

Example 3: Recent Opportunities

- Date: Last 30 days
- Type: Opportunities
- Custom: Stage contains "Proposal"

Tips:

- Start broad, then narrow down
- Save common combinations (mentally note)
- Clear filters when done

5.8 Managing Filters

Clear Filters:

- Click "Clear Filters" button
- Resets to default view
- Shows all activity types
- Returns to "All Time" range

Apply Changes:

- Filters apply in real-time
- No "Apply" button needed
- Timeline updates as you select

6. Tips and Best Practices

6.1 Daily Habits

Start Your Day:

1. Check "Upcoming & Overdue" section on key accounts
2. Review today's scheduled events
3. Identify high-priority tasks
4. Plan your day based on timeline

Throughout the Day:

- Log activities immediately after completion
- Update task statuses in real-time
- Add notes while information is fresh
- Create follow-up tasks before forgetting

End Your Day:

- Mark completed tasks as done
- Review tomorrow's schedule
- Create any missing tasks for tomorrow
- Add notes to close open items

6.2 Communication Best Practices

Email Activities:

- Email automatically creates timeline records
- Review before calling customer

Meeting Follow-ups:

- Always log meetings immediately
- Document key decisions
- Note action items as tasks
- Share outcomes with team

Task Management:

- Create tasks for all commitments
- Set realistic due dates
- Use descriptions for clarity
- Update status regularly

6.3 Collaboration Tips

Team Visibility:

- Review teammate activities on shared accounts
- See who contacted customer recently
- Avoid duplicate outreach
- Coordinate team efforts

Using Owner Filters:

- Check specific teammate's activities
- See manager's interactions
- Review team member workload
- Identify collaboration opportunities

Handovers:

- Use timeline to brief colleagues
- Share context before meetings
- Transfer knowledge efficiently
- Maintain continuity

6.4 Efficiency Tips

Keyboard Shortcuts:

- **Tab** - Move between filters
- **Enter** - Open selected activity
- **Escape** - Close filters or details
- **Arrow keys** - Navigate activities

Quick Actions:

- Use quick create buttons for speed
- Edit directly from timeline
- Delete outdated activities regularly
- Keep timeline clean and current

6.5 What to Avoid

Don't:

Ignore Overdue Items

- Address overdue activities promptly
- Update or reschedule if needed
- Don't let items age indefinitely

Create Duplicates

- Check existing activities first
- Edit instead of recreating
- Maintain single source of truth

Use Vague Descriptions

- Be specific in subjects
- Add context in descriptions
- Future you will thank present you

Neglect Updates

- Keep statuses current
- Add notes after meetings
- Update as situations change

Forget to Follow Up

- Create follow-up tasks immediately
- Set reminders for important items
- Close the loop on commitments

7. Troubleshooting

7.1 Timeline Not Loading

Symptoms:

- Blank section
- Endless loading spinner
- Error message

Try:

1. **Refresh page** (F5 or Ctrl+R)
2. **Check internet connection**
3. **Clear browser cache**
    - Chrome: Ctrl+Shift+Delete
    - Settings → Clear browsing data
4. **Try different browser**
5. **Log out and log back in**
6. **Contact your administrator** if issue persists

7.2 Missing Activities

Symptoms:

- Expected activities don't appear
- Timeline seems incomplete

Check:

1. **Active filters**
   - Click "Clear Filters"
   - Check date range (try "All Time")
   - Verify type filters are checked
2. **Permissions**
   - You may not have access to all activities
   - Contact admin if you should have access
3. **Related records**
   - Verify activities are linked to correct record
   - Check relationship fields

7.3 Can't Create/Edit Activities

Symptoms:

- Buttons grayed out
- "Insufficient privileges" error

Reasons:

- You may lack create/edit permissions
- Record may be locked
- Your profile may not allow this action

Solution:

- Contact your Salesforce administrator
- Request appropriate permissions
- Verify you're on correct record

7.4 Search Not Working

Symptoms:

- No results when searching
- Results seem incorrect

Try:

1. **Simplify search terms**
   - Use single keywords

    - Check spelling
2. **Clear other filters**
    - Remove date restrictions
    - Enable all activity types
3. **Try different keywords**
    - Synonyms
    - Partial words
4. **Check field visibility**
    - You can only search visible fields

7.5 Performance Issues

Symptoms:

- Slow loading
- Laggy scrolling
- Browser freezing

Solutions:

1. **Reduce date range**
    - Use Last 30 days instead of All Time
2. **Filter by type**
    - Show fewer activity types
3. **Clear browser cache**
4. **Close other browser tabs**
5. **Use more selective filters**
6. **Contact admin** if consistently slow

7.6 Display Issues

Symptoms:

- Layout looks broken
- Icons missing
- Text overlapping

Try:

1. **Refresh page**
2. **Check browser zoom** (should be 100%)
3. **Try different browser**
4. **Clear cache**
5. **Update browser to latest version**
6. **Contact support** with screenshot

8. FAQ

General Questions

Q: Where did my timeline go?
A: Your administrator controls where timelines appear. If you previously had access and it's now missing, contact your admin. They may have moved it to a different section or tab.

Q: Can I customize what fields are displayed?
A: Field selection is controlled by your administrator. Request changes through your admin if you need different fields displayed.

Q: How far back does the timeline show?
A: The timeline shows all historical data based on your filter selection. Use "All Time" to see everything you have access to.

Activities

Q: Why can't I see some activities?
A: You can only see activities you have permission to view. This is based on your profile, sharing rules, and record access.

Q: Can I delete activities?
A: You can delete activities you own or if you have delete permissions. Some activities (like emails) may have restrictions.

Q: How do I mark a task complete?
A: Click the edit icon (✏️) on the task, change Status to "Completed," and save. Or click directly on the status field if quick edit is enabled.

Q: Can I create activities for teammates?
A: Yes, when creating a task or event, you can assign it to any user. Use the "Assigned To" field to select a teammate.

Filters

Q: Why do my filters keep resetting?
A: Filters are session-based and reset when you navigate away from the page. You may need to reapply filters each time you return to a record.

Q: Can I save my favorite filter settings?
A: Currently, filter settings are not saved. However, you can quickly reapply common combinations using the preset options.

Search

Q: Why doesn't search find what I'm looking for?
A: Search only looks in visible fields. If information is in a hidden field, it won't appear in search results. Also ensure your filters aren't too restrictive.

Q: Can I search by date?
A: Use date filters instead of text search for date-based filtering. Text search is for keywords in activity content.

Technical

Q: Which browsers are supported?
A: Activity Timeline works on all modern browsers: Chrome, Firefox, Safari, Edge. Always use the latest version for best performance.

Q: Does timeline work offline?
A: No, Activity Timeline requires an internet connection to load and display activities from Salesforce.

Getting Help

Q: Who do I contact for help?
A: For usage questions, start with your Salesforce administrator. For technical issues or bugs, your admin can contact MS² Technologies support.

Q: Where can I find more training?
A: Check with your administrator for:

- Internal training sessions
- Documentation library
- Video tutorials
- Quick reference guides

Q: How do I request new features?
A: Share enhancement requests with your Salesforce administrator, who can submit them to MS² Technologies.

Contact & Support

For Questions or Issues: Contact your Salesforce Administrator
MS² Technologies: Email: contact@ms2tech.fr
Documentation: Available in the Activity Timeline app

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