

ViewAllActivities

Lightning Component

USER MANUAL

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View All Activities User Manual

- **Component Overview:**

View All Activities is a Salesforce native lightning component. The component is used to display all the activities (Events and Tasks) related to a given record of a particular object. It supports point and click graphical user interface which is very simple and easy to use.

By using this lightning component, Salesforce administrators can view all the related activities of a record.

- Install **ViewAllActivities** package. Select **Install for All Users** and then click on **Install** button.

 **Install ViewAllActivities**
By Astrea It Services


☐ Install for Admins Only


☒ Install for All Users


☐ Install for Specific Profiles...

App Name	Publisher	Version Name	Version Number
ViewAllActivities	Astrea It Services	ViewAllActivities	1.0
Additional Details View Components			

- After the package is installed successfully, the user gets the following screen:

SETUP
Installed Packages

Installed Packages

On Force.com AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages.](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.


[Visit AppExchange »](#)

Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects
Uninstall 	ViewAllActivities	Astrea IT Services	1.0	allactivities	4/20/2017 4:39 PM	☐	0	0	0

- **Steps to add the Component on the Object's Detail Page**

Add the new **Lightning Quick Action** by following these steps:

In this case we have taken Contact object.

- Go to **Setup > Object Manager > Contact > Buttons, Links, and Actions**, the following screen will appear.

Buttons, Links, and Actions (16)

 **New Action** [New Custom Button or Link](#)

LABEL	NAME	DESCRIPTION	TYPE	CONTENT SOURCE	OVERRIDDEN
Add to Campaign	AddToCampaign			Standard Salesforce.com Page	
Add to Campaign	MassAddToCampaign			Standard Salesforce.com Page	
Check Integration Status	XClean			Standard Salesforce.com Page	
Clean	ListClean			Standard Salesforce.com Page	
Clone	Clone			Standard Salesforce.com Page	

- Click on **New Action** button.
- Enter the action information by selecting **Lightning Component** in **Action Type**, **allActivities : ShowAllActivity** in **Lightning Component**.
- Enter the **Label** as **View All Activity**.

Contact Actions New Action

Enter Action Information Save Cancel

Object Name Contact i

Action Type Lightning Component i

Lightning Component allactivities:ShowAllActivity i

Height 250px i

Standard Label Type --None-- i

Label View All Activity

Name View_All_Activity i

Description i

Icon ⚡ [Change Icon](#)

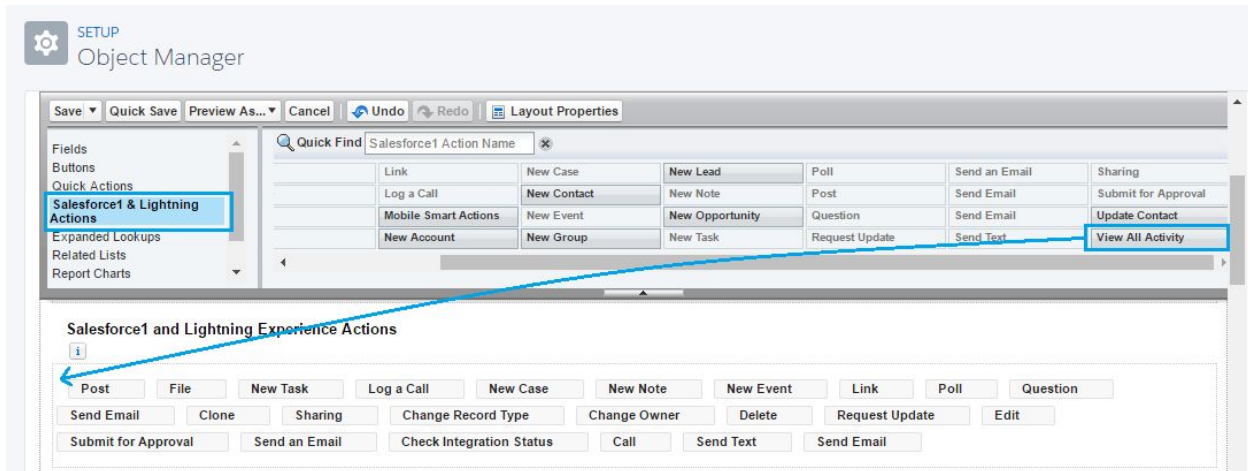
➡ Save Cancel

e. Click on **Save** button to save the changes made.

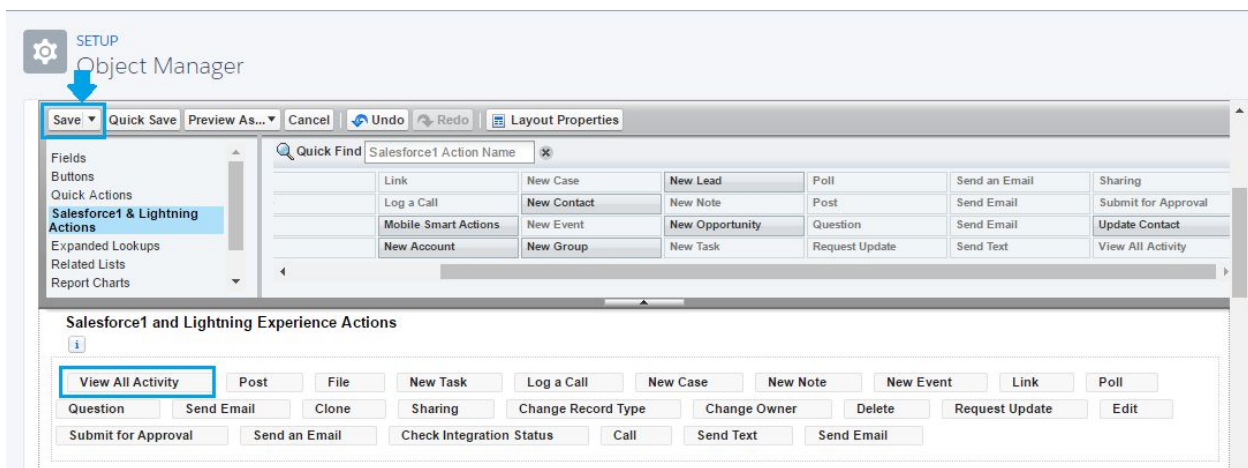
Request Update	RequestUpdate		Standard Salesforce.com Page	▼
Send Survey	send_survey	List Button	OnClick JavaScript	▼
Send Survey	Send_Survey_Contact_Detail	Detail Page Button	OnClick JavaScript	▼
Send Survey To Selected	Send_Survey_To_Selected	List Button	Visualforce Page	▼
View	View		Standard Salesforce.com Page	▼
View All Activity	View_All_Activity	Lightning Component	Lightning Component	▼

Now the **View All Activity** quick action needs to be added on the detail page of Contact object

- **Steps to add the View All Activity quick action in Contact page layout:**
 - a. Go to **Setup > Object Manager > Contact > Contact Page Layouts > Contact Layout**



- b. Drag the **View All Activity** quick action to **Salesforce1 & Lightning Actions** section.



- c. Click on **Save** Button.

- **View All Activities Component Functionality:**

In order to see the functionality of newly created quick action add few events and tasks in the given Contact record.

- To add events:
 - a. Click on **New Event** button on the Contact detail page.
 - b. Fill the fields.

Sales Home Chatter Opportunities Leads Tasks Files Accounts **Contacts** Campaigns Dashboards Reports Chatter Groups Calendar People Cases Forecasts

Astrea Demo + Follow View All Activity New Case New Note

New Task Log a Call **New Event** Send Em...

Subject: Marketing Meeting

*Start: Date 4/20/2017 Time 6:00 AM

*End: Date 4/20/2017 Time 7:00 AM

All-Day Event ☐

Name: Astrea Demo

Related To: Search Accounts

*Assigned To: Sonal Agarwal

Location:

Save

c. Click on **Save** button.

CONTACTS
Astrea Demo + Follow View All Activity New Case New Note

RELATED DETAILS

Contact Owner: Sonal Agarwal Phone: (987) 129-9786

Name: Astrea Demo Home Phone

Account Name: Mobile

Title: Other Phone

Department: Fax

Birthdate: Email: testastrea@gmail.com

Reports To: Assistant

Lead Source: Asst. Phone

Activity CHATTER

New Task Log a Call **New Event** Send Em...

Subject:

Filter Timeline

Next Steps

- Marketing Meeting Start 4/20/2017 6:00 AM End 4/20/2017 7:00 AM 6:00 AM | Today
- Salesforce Webinar Start 4/21/2017 5:00 AM End 4/21/2017 7:00 AM 5:00 AM | Tomorrow

After adding the events, Contact detail page will look something like this.

- To add tasks:
 - a. Click on **New Task** button on the Contact detail page.
 - b. Fill the fields.

Astrea Demo + Follow View All Activity New Case New Note ▼

RELATED DETAILS

Contact Owner	Phone
Sonal Agarwal	(987) 129-9786
Name	Home Phone
Astrea Demo	
Account Name	Mobile
Title	Other Phone
Department	Fax
Birthdate	Email
	testastrea@gmail.com
Reports To	Assistant
Lead Source	Asst. Phone
Mailing Address	Other Address
Languages	Level
Created By	Last Modified By

ACTIVITY CHATTER

New Task Log a Call New Event Send Em...

Subject
Task 1

Due Date
4/20/2017

Name
Astrea Demo

Related To
Search Accounts

* Assigned To
Sonal Agarwal

* Status
In Progress

Save

c. Click on **Save** button.

Astrea Demo + Follow View All Activity New Case New Note ▼

RELATED DETAILS

Contact Owner	Phone
Sonal Agarwal	(987) 129-9786
Name	Home Phone
Astrea Demo	
Account Name	Mobile
Title	Other Phone
Department	Fax
Birthdate	Email
	testastrea@gmail.com
Reports To	Assistant
Lead Source	Asst. Phone
Mailing Address	Other Address
Languages	Level

ACTIVITY CHATTER

New Task Log a Call New Event Send Em...

Subject

Filter Timeline

Next Steps

- Marketing Meeting
Start: 4/20/2017 6:00 AM
End: 4/20/2017 7:00 AM
6:00 AM | Today
- Salesforce Webinar
Start: 4/21/2017 5:00 AM
End: 4/21/2017 7:00 AM
5:00 AM | Tomorrow
- ☐ Task 1
Today
- ☐ Task 2
Tomorrow

After adding the tasks, Contact detail page will look something like this.

- Click on **View All Activity** quick action

Astrea Demo + Follow **View All Activity** New Case New Note ▼

RELATED DETAILS

Contact Owner	Phone
Sonal Agarwal	(987) 129-9786
Name	Home Phone
Astrea Demo	
Account Name	Mobile

ACTIVITY CHATTER

New Task Log a Call New Event Send Em...

Subject

- After clicking on **View All Activity**, a pop-up window appears containing all the related activities(**Events** and **Tasks**) of the concerned record.

- All the related tasks of the given Contact record are displayed.

The screenshot shows a 'View All Activity' modal window overlaid on a contact record for 'Astrea Demo'. The modal displays a 'TASK List' with the following data:

SUBJECT	STATUS	PRIORITY	RELATED TO	NAME	DUE DATE
Task 1	In Progress	Normal		Astrea Demo	Apr 20, 2017
Task 2	Not Started	Normal		Astrea Demo	Apr 21, 2017

The modal also includes 'Previous' and 'Next' navigation buttons and a 'Cancel' button at the bottom right.

- All the related events of the given Contact record are displayed.

The screenshot shows the same 'View All Activity' modal window, but now displaying an 'EVENT List' for the contact 'Astrea Demo'. The modal displays the following data:

SUBJECT	RELATED TO	NAME	DUE DATE	ASSIGNED TO	LAST MODIFIED
Marketing Mee...		Astrea Demo	Apr 20, 2017	Sonal Agarwal	Apr 20, 2017
Salesforce Web...		Astrea Demo	Apr 21, 2017	Sonal Agarwal	Apr 20, 2017

The modal also includes 'Previous' and 'Next' navigation buttons and a 'Cancel' button at the bottom right.