

Installation and setup guide

This manual will guide you through the process of installing the official *TimeCapsule*

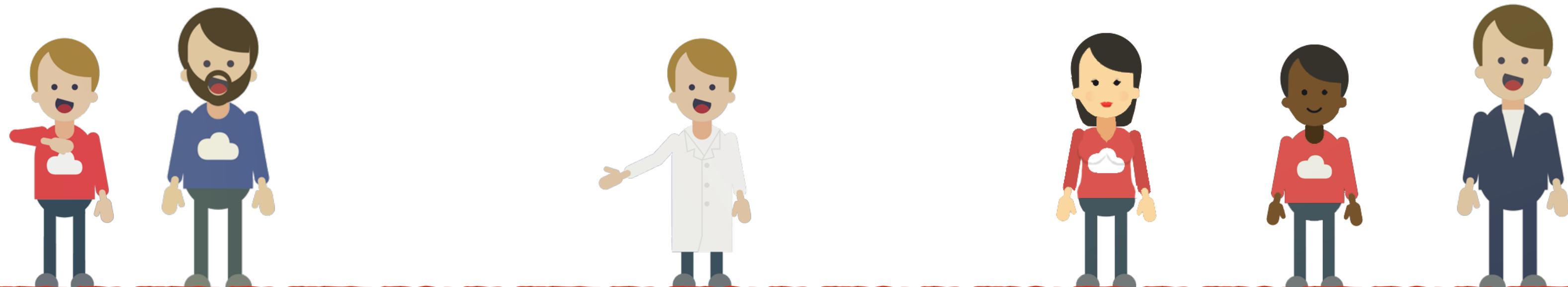
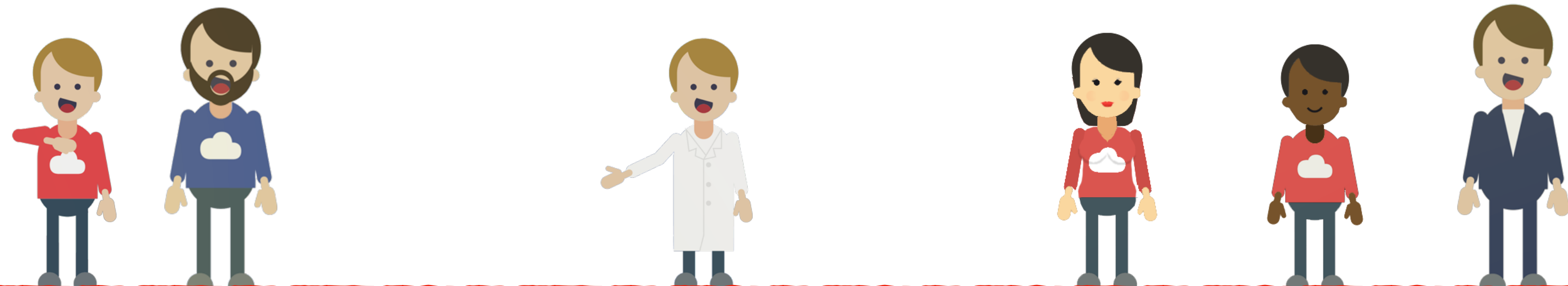


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Get Started

1. Installation of AppExchange package

1. Go to the "TimeCapsule"
 - a. Click the button "Get It Now"
 - b. Allow Salesforce to have access to basic information
2. Choose where you want to install the app. Install in a Sandbox Org is highly recommended.
3. Select install for admin only (later on we will expand this to other users)
4. Fill out the section Tell us about yourself. Select the checkbox to agree to the terms and conditions and press Confirm and Install

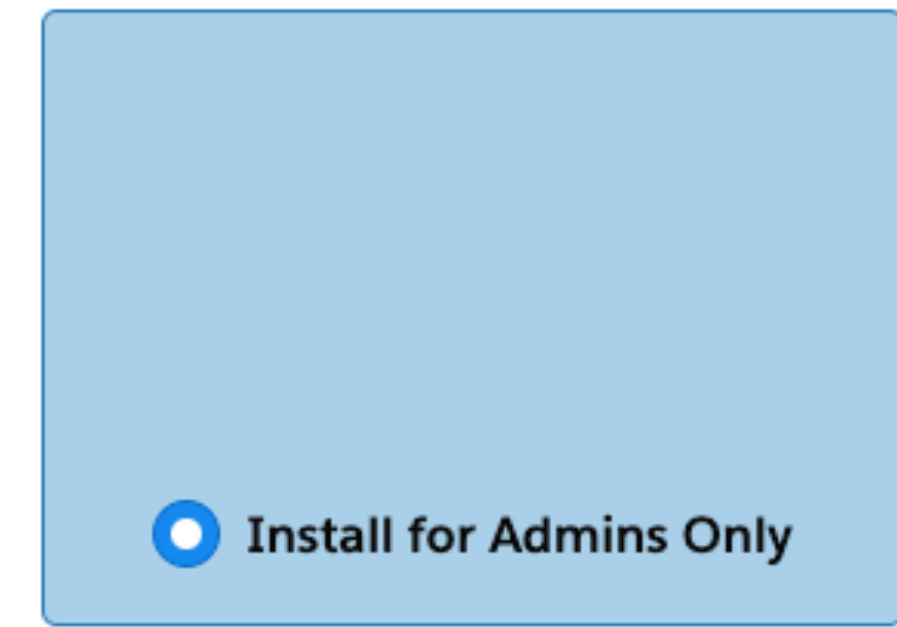
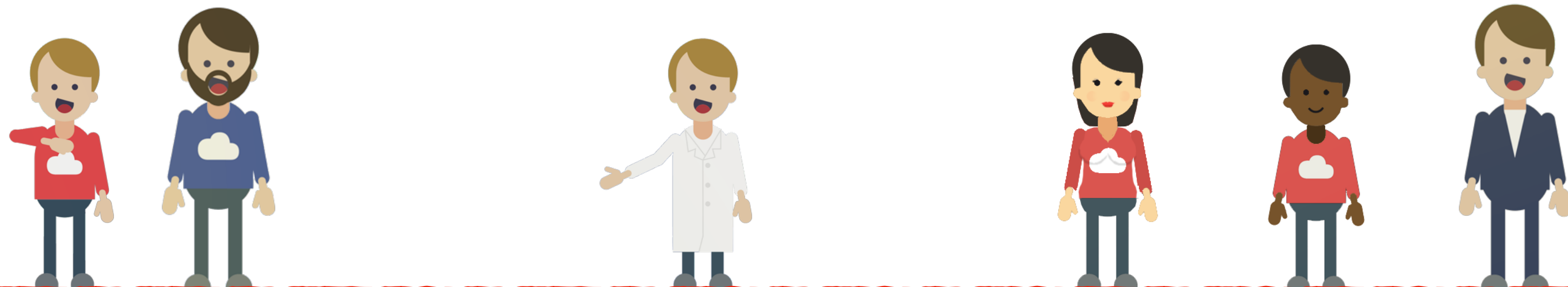


Figure 1: Select install for admin only



2. Assign permission set

1. Go to permission sets in the setup
2. Select the *TimeCapsule permission set*
3. Select manage assignments and then *add assignments*
4. Click the checkbox and assign to the profile
5. Permission set is now assigned to the profile

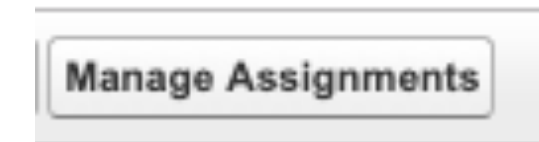
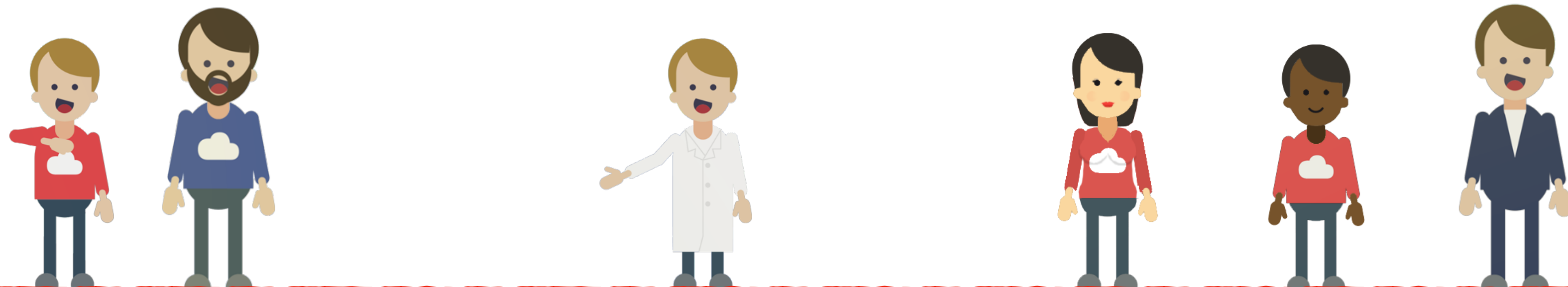


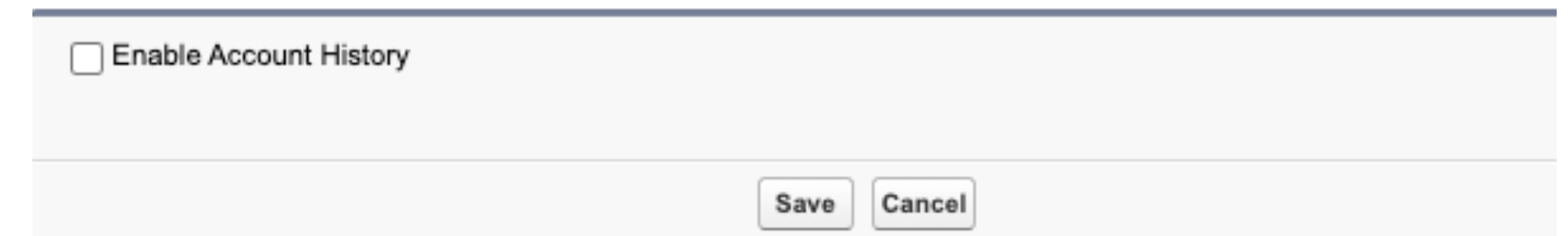
Figure 2: Select manage assignment in order to assign the TimeCapsule permission set



3. Activate field history tracking

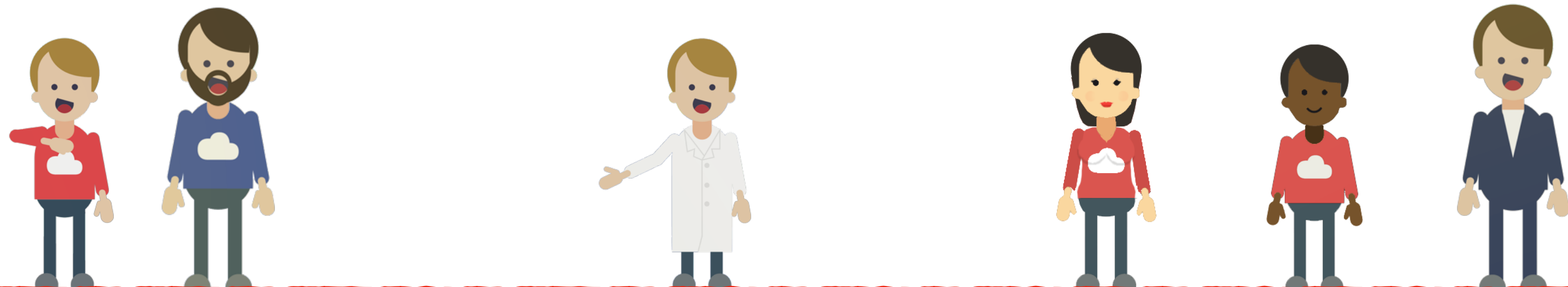
Activate field history tracking on Standard and custom objects:

1. Go to Setup → Object Manager → And choose the object where you want to activate the fields. Click on object.
2. Within the selected object click on *Fields & Relationships* and click in the right top corner *Set history Tracking*.
3. Before you're able to activate the feature you must *enable* Field history tracking.
5. After enabling the feature select checkbox of all the fields that you would like to keep track off
6. Click 'Save'.



A screenshot of a Salesforce interface showing a checkbox labeled "Enable Account History". The checkbox is currently unchecked. Below the checkbox are two buttons: "Save" and "Cancel".

Figure 3: Example: Enable the field history tracking feature on the selected object



4. Setup of UI utilize the TimeCapsule component

This section will help you to setup the UI of the TimeCapsule Lightning Web component.

1. Go to a record where you want to add the TimeCapsule component. *(Note: Make are you have activated the field history tracking feature and selected the field that you want to keep track off)*
2. Click the right corner top and select *Edit Page*. You're now in the Lightning App Builder.
3. In the bar left all the way on the bottom you can find the TimeCapsule under 'custom'
4. Select, drag and drop the TimeCapsule. *You must Activate the page in order to make it visible to your users.*
5. Assign the page as org default or app default.
6. Click *save*.
7. The TimeCapsule is now visible on the recordpage.

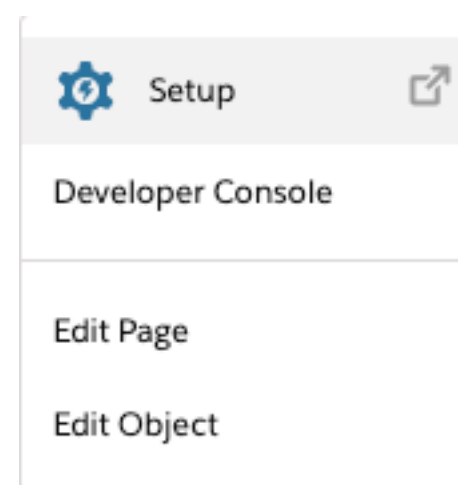


Figure 4: Edit recordpage in order to add component

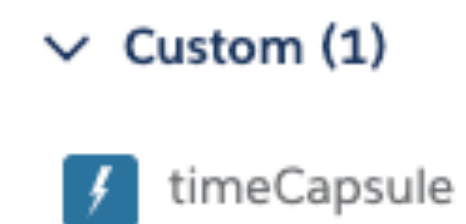


Figure 5: Drag and drop the component in the Lightning App Builder

