

Unified Communication

Every email, task, event, comment and file on a record, in one thread, with a tab for each.

Communication

New ▾

↺

All

Tasks

Events

Emails

Case Comments

Files

Order replacement toner

Status: Not Started

Due Date Only: Oct 26, 2026

Oct 26, 2026 >

Site visit at Northwind

Start Date Time: Oct 25, 2026, 06:11 PM

Location: Northwind head office

Oct 25, 2026, 06:11 PM

Call Jordan to confirm the printer is back

Status: Not Started

Due Date Only: Oct 24, 2026

Oct 24, 2026 >

Printer display photo

File Extension: png

Oct 23, 2026, 06:11 PM

Printer error log

Oct 23, 2026, 06:11 PM

1

thread for emails, tasks, events, comments, files and custom objects

4

email actions from the record: New, Reply, Reply All, Forward

5

languages: English, German, Spanish, French (CA), Portuguese (BR)

Unified Communication puts **everything that has been said about a record in one component**: its emails, tasks, events, case comments, files and any custom object that points at it, such as a text-message object. Each kind of item gets its own tab, and an **All** tab merges them into one thread, newest first. People can **add items and send email** without leaving the record.

The story of a customer is scattered across five related lists

To understand a case or account you open the Activity timeline, Emails, Files, Case Comments and a custom object or two, then piece the order together in your head. New starters never learn where everything lives, and busy people miss the one message that mattered.

1

One chronological thread

The **All** tab merges every channel by its own date, newest first, with **Load More** for long histories. A tab per channel keeps each kind separate when you need it.

2

You decide what each page shows

A **rule** picks the base object, optional conditions and an ordered list of tabs, so a Case page and an Account page can show different threads.

3

Act without leaving

New creates a task, comment or other item with **preset values** you define. **Send email** from the record, reply, reply all or forward, and it is logged on the record.

4

Cards you can read at a glance

Each item shows an icon, a date, a title link and two summary fields. Expand it for more fields, or a field set, and see its attached files.

5

Works with your own objects

Add a text-message object, a call log or anything with a lookup to the record. List the lookup once in Settings and use it in a rule.

6

Runs as the person

Users see only the records, tabs and fields they can already read. A Read Only user sees the thread without a New button.

Without Unified Communication

- History spread over several related lists
- No single time-ordered view of a customer
- New items created on different screens, with no preset values
- Custom objects that nobody remembers to check

With Unified Communication

- One thread with a tab per kind of item
- Rules that choose the tabs for each object
- New and email actions with preset values
- Your own objects as tabs

WHAT IT DOES

The whole conversation in one place

Expand a card for the detail

Open an item to see its other fields, then collapse it again. Tasks, events, emails and your own objects all use the same cards.

Communication

New

All

Tasks

Events

Emails

Case Comments

Files

Order replacement toner

Oct 26, 2026

Status: Not Started

Due Date Only: Oct 26, 2026

Call Jordan to confirm the printer is back

Oct 24, 2026

Status: Not Started

Due Date Only: Oct 24, 2026

Priority

High

Description

Ask whether the test page prints and whether the other floors are affected.

Assigned To ID

A task expanded in the Tasks tab.

Check the print server logs

Status: Completed

Due Date Only: Oct 21, 2026

1 file(s)

Priority

Normal

Description

The spooler stopped after the nightly update.

Assigned To ID

John Lawton

Files

Printer error log.txt

Files shown on a task.

Files with the item they belong to

Attached files appear on the card, with a count, and the **Files** tab lists every file on the record.

Create from the thread, with presets

New opens a form with the fields the admin chose. Presets fill values such as today's date, the record's contact or a fixed priority, and files can be attached in the same step.

New Items

Allow New

Shows a New button that creates an item on this tab, linked to the record.

The fields on the New form. A preset fills a field in; a hidden field is not shown to the user.

Field	Required	Preset	Preset Value	Hidden
Subject (Subject)	☒	None		☐
Description (Description)	☐	None		☐
Due Date Only (ActivityDate)	☐	Today		☐
Name ID (WhoId)	☐	A Field of the Record	Contact ID (ContactId)	☒
Priority (Priority)	☐	A Fixed Value	High	☒

+ Add Field

Attach Files on New

The New form takes files and links them to the new item.

A tab's New settings: required fields, presets and hidden values.

WHAT IT DOES, CONTINUED

Built by admins, no code

The rule editor.

Settings: switch it on, choose the objects

A master switch, a page size and the objects the app may be used with. Choose them with a dual list, and add mappings so your own objects can become tabs.

The Settings tab.

Related Object	Base Object	Lookup Field	Active
Case Comment	Case	ParentId	☒
Email Message	Case	ParentId	☒
Email Message	Account	RelatedToId	☒
Email Message	Case	RelatedToId	☒

Relationship mappings.

Rules choose the tabs

Pick a base object, add conditions, and order the tabs. Reorder, edit or remove a tab, then save.

Add your own objects

List the lookups you allow once in Settings. Any object with a lookup to the record can become a tab.

HOW IT WORKS

Up and running in four steps

1. Assign access

Give admins **Unified Communication Admin**; everyone who should see the thread needs one of the three sets.

2. Check Settings

Enabled objects and relationship mappings. The starter rules rely on the standard ones.

3. New from template

Pick the template for your object, for example Case, and save it.

4. Place it

Drag the component onto the record page, leave Rule on Automatic, save and activate.

Who it is for

- **Support and service teams.** read the whole case history and reply from one place.
- **Account managers and sales.** see every interaction with an account in order.
- **Admins.** build the thread for each object with rules, not code.

Built for trust

- **Native to Salesforce.** Rules live in your org as Custom Metadata; email is sent through the platform and logged on the record.
- **Runs as the person,** so nobody sees a record, tab or field they could not already read.
- **Three permission sets,** with Create and Send Email custom permissions for fine control.
- **Interface and guides in five languages** (the new email-sending screens are English for now).

Everything included

- ✓ Tab per channel plus an All thread, newest first
- ✓ Emails, tasks, events, case comments and files
- ✓ Your own objects as tabs, through mappings
- ✓ Rules by base object and conditions
- ✓ Starter rule templates
- ✓ Cards with summary fields, expand for more, or a field set

- ✓ New with preset values and file attachment
- ✓ New Email, Reply, Reply All, Forward from the record
- ✓ Record page and Utility Bar placement
- ✓ Standard refresh on record pages and a Refresh button
- ✓ Admin, User and Read Only permission sets
- ✓ In-app guides in five languages

See a whole record in one thread

Unified Communication is built and tested, and its guides are in five languages. Ask for a walk-through on your own Case or Account page.