

Native Planner Setup Step by Step

Field	Values	Description	Example
Component Planner Type	Picklist: GANTT / SCHEDULER	SCHEDULER: Capable of stacking or overlapping records on the same line. GANTT: Capable of linking records that have references to each other, but records are separated by rows.	GANTT
Component Planner Height	Integer (Min 250)	Component height in pixels	500
Component Load More Scale	Integer (5 - 50)	Breaks the data load into chunks, and define the number of Parents records to load at once (The min of 5 and max of 50).	5
Component Show Color Legends	Picklist: YES / NO	Define the component to display legends. (Yes or No) Required (Yes): Child Color Field must be filled)	YES
Component Use Page Record Id	Picklist: YES / NO	Filter the parent records by the page record Id.	NO
Component Title	Text	Title to be shown at the top left of the component.	Native Chart
Component Title Size	Integer (12 - 32)	Font Size of the Title.	22
Component Icon	Picklist	Select an icon from the lightning design system to use next to the chart.	EVENT
Component Icon Size	Picklist: SMALL / MEDIUM / LARGE	Icon size can be customized to: Small / Medium / Large	MEDIUM
Component Default Timeline	Picklist: DAY / HOUR / WEEK / MONTH	Default timeline scale to use (Day / Hour / Week / Month)	DAY
Component Date Format	US/EUROPE	Change the dates format to MM-DD-YYYY vs DD-MM-YYYY	EUROPE
Component Start Date	TODAY / MM/DD/YYYY	The date from which component should start	Today
Component End-In Days	Integer (10 - 45)	Range of component, the number of days to show on the component from start date. (Ex – 10 days after Today)	10
Component End-In Weeks	Integer (7 - 14)	Week scale range, the number of weeks to show from start date.	7
Component End-In Months	Integer (6 - 12)	Month scale range, the number of months to show from start date (12 will show the entire year after start date)	6
Component Start Time	Picklist	The Starting hour/time in the Hour scale (Can be match with office opening hours 8:00am)	06:00 AM
Component End Time	Picklist	The End hour/time in the Hour scale	07:00 PM

		(Can be match with office closing hours 5:00pm)	
Component Time Scale	Picklist: HH / MM / etc.	Select between 15, 30, and 60 minutes timeframe.	15
Component Day Scale	Integer (3 - 7)	The number of days showing under the Hour time scale.	3
Component Opt-Out Days	Text	Days that should not be displayed on the chart (ex. Saturday, Sunday)	SATURDAY, SUNDAY
Parent Field	Text	Define a field to be used as a parent sObject (left column).	Project__c
Parent Record Id Field	Text	Specified field to be used as filter for the parent sObject with the Page Record Id (Can use other fields in the record besides RecordID)	AssignID
Parent Left-Side Fields	Text	Fields names to be used as a label on the first column on the left (Separated by commas and can be quick filter on the screen and the advanced filter)	Name, Unit__r.Name
Parent Search Fields	Text	Fields to be used only as quick filter and the advanced filter, but not to be displayed. (Separated by commas, used to filter the left column).	Approval_Status__c
Parent Filter Statement	Text	Define a filter statement to be used with the specified parent sObject (Ex. ID, RecordType, etc.)	Id = 'a0K1U000004K6aUUAS' OR Id = 'a0K1U00000Arfw7UAB'
Child Field	Text	Field to be used as a child sObject	Project_Task__c
Child Custom Relationship	Picklist: YES / NO	Use a child sObject to use a custom relationship with the parent sObject.	NO
Child Custom Relationship Field	Text	Define the lookup field to be used as a relationship in situations where the specified parent has no direct relationship to the child.	OwnerId
Child Link Field	Text	A field to be used as a link/path between records in Gantt chart. (Ex. - predecessor task)	Predecessor_Project_Task__c
Child Title Fields	Text	Fields names to be used as a label displayed on the child records (Separated by a comma, limit to 3 fields)	Name, Status__c, Completion__c
Child Popup Fields	Text	Fields names to be used in the Popup box when click on child record, can be edited if read only set to no (comma separated)	Name, Start_Date__c, End_Date__c, Status__c, Completion__c
Child Start Field	Text	Field to be used as the start date of the specified child sObject (Date/ DateTime field can be used)	Start_Date__c
Child End Field	Text	Field to be used as the end date of the specified child sObject (Date/ DateTime field can be used)	End_Date__c
Child Filter Statement	Text	Define a filter statement to be used with the specified child sObject	Status__c = 'Approved'
Child Progress Field	Text	Field to be used to set the progress of the child record. (Limit to 0.0 – 1.0)	Completion__c

		This will display a gradient color to represent progress)	
Child Color Field	Text	Used as the reference field value to relate to the Child Color Matrix configuration	Status__c
Child Color Matrix	Text	<p>Define an array of keys and values to be used with the Child Color Field.</p> <p>Formatting must be: [{'key': '1st Child Color Field Value', 'value': 'red'}, {'key': '2nd child color field value', 'value': '#404040'}]</p>	[{'key': 'Draft', 'value': '#74737a'}, {'key': 'Planning', 'value': '#ff828b'}, {'key': 'Active', 'value': '#7CA7B2'}, {'key': 'Completed', 'value': '#3E8461'}]
Child Can Overlap	Picklist: YES / NO	Allow child record to overlap with another child record (require Scheduler Component Type) Ex – ability to place 2 assets in same allocation)	NO
Child Read Only	Picklist: YES / NO	Yes - the user will not be able to drag or edit the record.	NO