

Customized Timeline Process - Advance Features

The following document provides instructions for features that require some technical skills. If you are not sure about it please contact our support (via email contact@app-solu.com) for assistance.

Customize the Marker Status Icons

1. Go to Setup->Static Resources
2. Click on the name of item **TimelineIcons**
3. Click the link [View file](#). This will download zip file to your device
4. In the zip file you can find 5 jpg files for the different marker status
5. Replace any file in the zip with different file
 - The new file must be jpg file with the exact same name of the replaced icon
6. Go back to Salesforce->Setup->Static Resource
7. Click the button New
8. Provide the following details
 - a. Name - free text
 - b. Description - free text
 - c. File - select the updated zip from your device
 - d. Cache Control - Public
9. Click Save
10. Go to Setup->Custom Settings.
11. Click Manage next to the **Org Settings**
12. Click the button Edit

Set Timeline Processing to Run in Background

- When?

If you have a specific object type that already has many internal customization, and you are concerned that the app processing for this object type might hit governor limits.

- Solution

Configure the processing for this object type to run in the background.

- Consideration

Running in the background, means that the end user won't see the result immediately, but it might take ~1 minute to complete.

1. Go to the tab **MBA Settings**
2. Click the button **Triggers Parameters**
3. In the top section - **Manage Parameters** - select the object that you want its processing to be done in the background.
4. In the Select Property section select --New-. This will add the input section below.
5. Repeat step 4. So you should have 2 input lines
6. In the first line set: parameter: timelineMKThreshold, value: 0
7. In the second line set: parameter: timelineCHThreshold, value: 0
 - You can set values other than 0. In that case during processing only if the app finds more than X markers (value that was set) it will run in the background.
8. Click the button **Save Parameters**

Customize the Marker Record Page

- When?

In case you need to customize the presentation of a single Marker Record.

- Solution

Customize Lightning Record Page or use metadata configuration to change the current layout.

Option 1- Customize Lightning Record Page

1. Got to Setup->Object Manager->Marker Record->Lightning Record Pages
2. Click on existing page **Marker Record Record Page**
3. Click **Clone**
4. Remove the component **Marker Record Page**
5. Drag the standard **Record Detail** instead
6. Click Save->Activate->Assign as org default
 - Note that using this solution some standard fields might be editable if you enable inline editing

Option 2 - Use Metadata to Configure the Current View

1. Go to Setup->Custom Metadata Types
2. Click Manage Records next to **Timeline Layout Property**
3. Click Edit next to **Marker Record Layout**
4. Copy the Value (json format) to JSON parser. For example, <https://jsonformatter.org/json-parser>
5. Add/remove fields and mention the fields that should be editable in the proper format (see attach screen image below for example)
6. Copy the updated json back to the metadata and click Save

```
1 {
2   {
3     "name": "general",
4     "showTitle": false,
5     "fields": [
6       {
7         "field": "Name"
8       },
9       {
10        "field": "mba_timeline__Timeline_Marker__c"
11      },
12      {
13        "field": "mba_timeline__Sequence__c"
14      },
15      {
16        "field": "mba_timeline__Related_Record_Id__c"
17      },
18      {
19        "field": "mba_timeline__Status__c"
20      },
21    ]
22  }
23 }
```

Use Custom Fields on the Timeline Process Page

1. Go to Setup->Object Manager.
2. Find the object Timeline Process.
3. On the left section, click the option **Fields & Relationships**.
4. Click the button **New** and define the custom field you need.
5. Go to Setup->Custom Metadata Types.
6. Click the button **Manage** next to **Timeline Layout Property**.
7. Click the option **Edit** next to **Timeline Custom Fields**.
8. In the Value input, write the custom fields that should be displayed and click the button **Save**.
 - Multiple fields can be used, with comma separated values.