

Gantt Chart

How to use

Custom Settings

“GanttChartSetting” is the Custom Setting that have all the custom fields.

Custom Fields		New		
Action	Field Label	API Name	Data Type	
Edit Del	Lookup Filter	Lookup_Filter__c	Text(100)	
Edit Del	NameData	NameData__c	Text(100)	
Edit Del	Object	Object__c	Text(255)	
Edit Del	Record by Lookup or All Records	Record_by_Lookup_or_All_Records__c	Checkbox	
Edit Del	X Axis Field	X_Axis_Field__c	Text(100)	
Edit Del	Y Axis Field	Y_Axis_Field__c	Text(100)	
Edit Del	Y Axis Field Optional	Y_Axis_Field_Optional__c	Text(100)	

Set of Data

Click edit to set the new data

Action	Name ↑
Edit Del	Setting

In this example we use Opportunity Fields

Edit GanttChartSetting

SaveSave & NewCancel

GanttChartSetting Information

Name

Setting

i

Y Axis Field

StageName

Y Axis Field Optional

LeadSource

X Axis Field

Start_Date__c, CloseDate

NameData

Name

Object

Opportunity

Record by Lookup or All Records

☒

Lookup Filter

AccountId

Custom Fields

Name: Has to be named Setting

X Axis Field: Is the field to be displayed on the x-axis in the Gantt Chart, it has to be separated by comma in the following order

(Start Date, End Date)

NameData: Is the Name Field that will show when you hover the mouse over a set of data.

e.g. Global Media - 400 artículos

Name 

X Axis Field 

NameData 

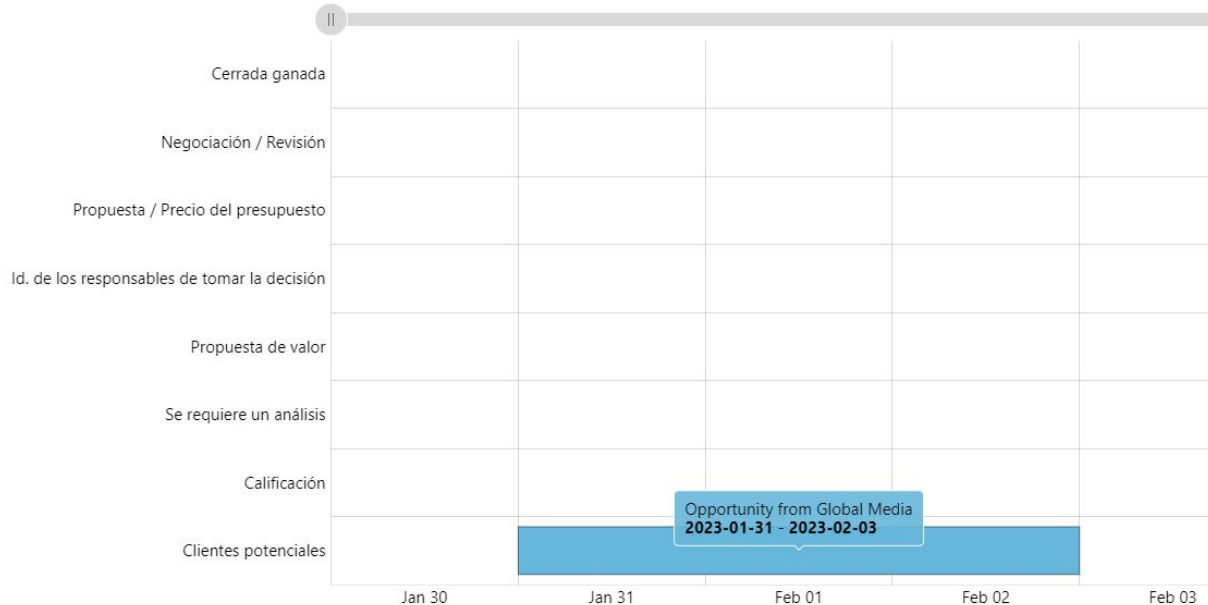


Custom Fields

Y Axis Field: Is the field to be displayed on the y-axis in the Gantt Chart

Y Axis Field ⓘ

StageName



In this example we have all stages that has an opportunity

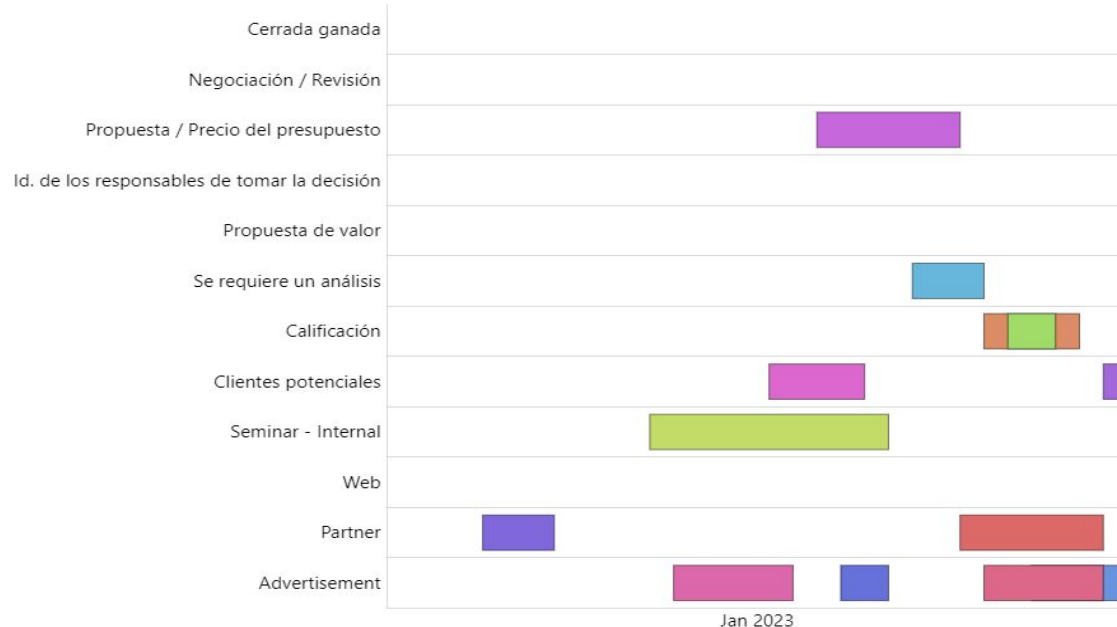
Custom Fields

Y Axis Field (Optional): This is an optional field. Here we will show the data in the row of this field if they have it. Otherwise it will only appear on the Y-Axis. These will show below the Y-Axis.

Y Axis Field Optional ⓘ

LeadSource

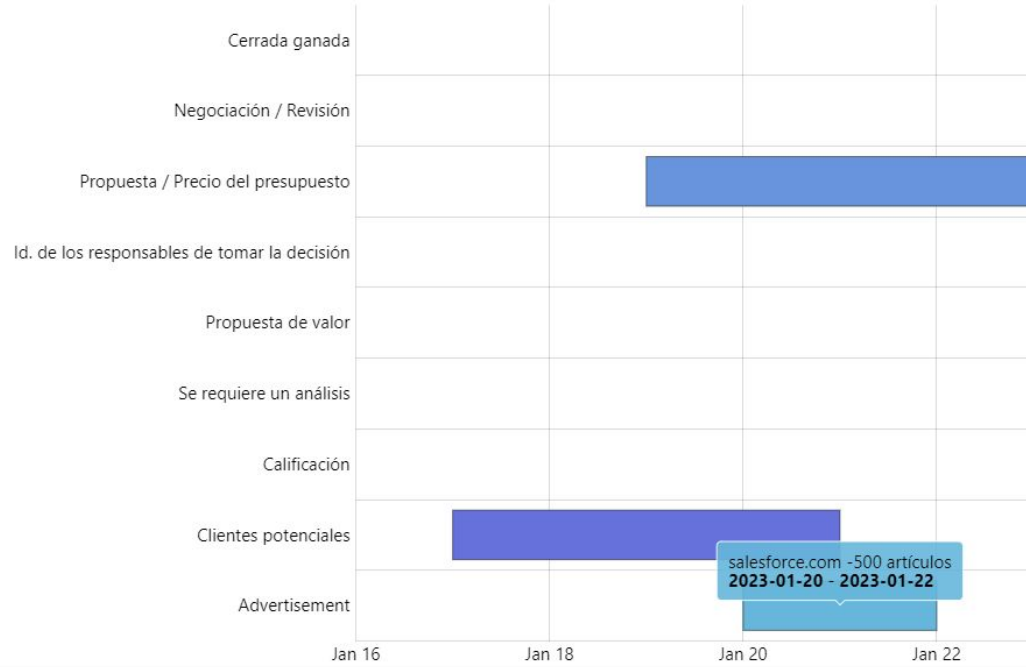
This field will only appear if it has some related data.



In this example we have all stages and all Lead sources (Seminar-Internal, Web, Partner, Advertisement) that has an opportunity.

Example

We have an Opportunity “salesforce.com - 500 artículos” that have LeadSource named “Advertisement”, therefore it will be displayed in the row created by this field.



Example

If there is not data with Lead Source, they won't show this field.



Custom Fields

Object: The name of the object of the fields used (API Name).

Record by Lookup or All Records: There is two ways to show the data

All Records (Unchecked) this is Global, we can use it in Home Tab or in a Record Page. This will show all records for an specific object.

Object  Opportunity

Record by Lookup or All Records  ☐

Calendar  Gantt Chart More 

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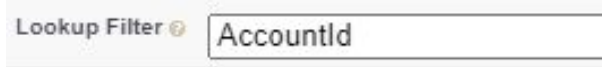
Custom Fields

Record by Lookup (Checked) this is when the Gantt Chart is used in a Parent Record and will show the child record.



Record by Lookup or All Records ☒

Lookup Filter: When it is *Record by Lookup*, we use this field to do the lookup.



Lookup Filter

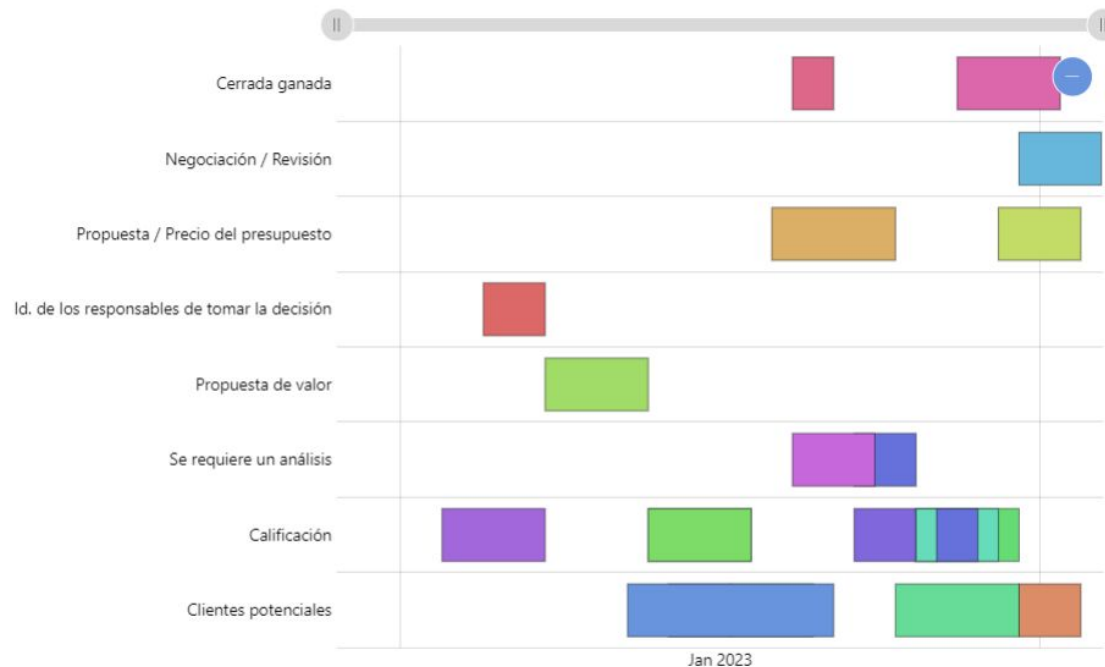
E.g. “AccountId” lookup to Account in Opportunity object.

All Records (Unchecked)

In All Record setting, you can view each set of data of Opportunity object.

Gantt Chart can be in a Record Page Tab or Home Page Tab

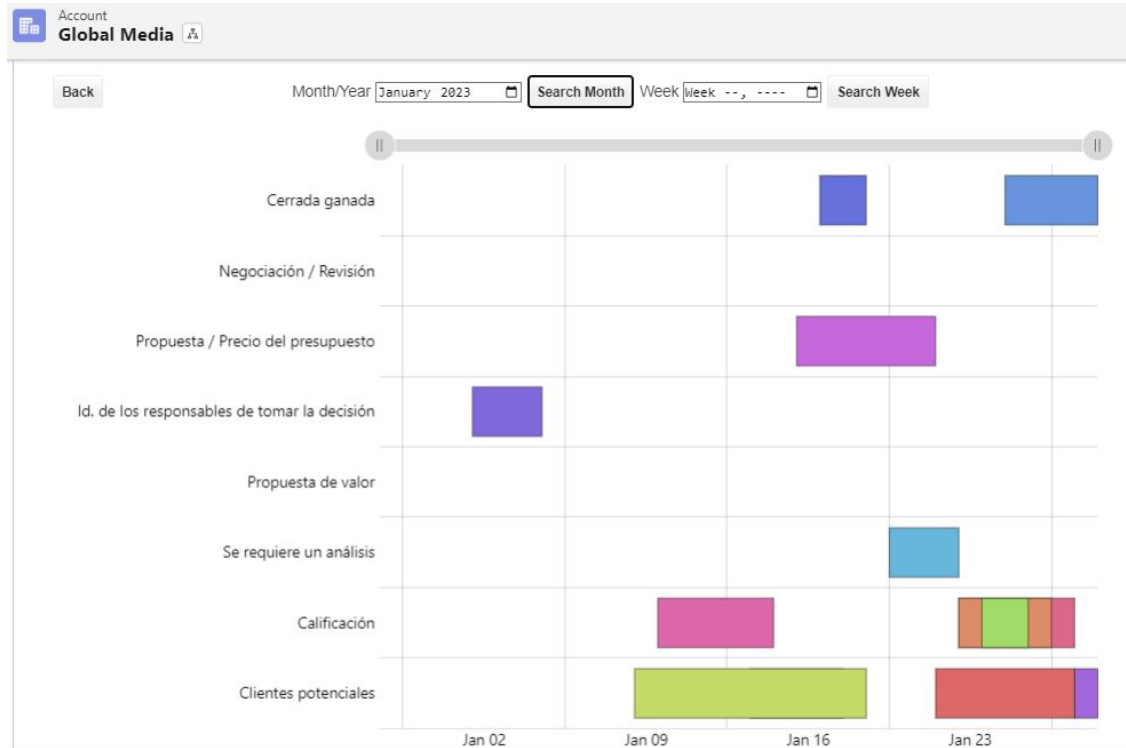
GanttChart



Record by Lookup (Checked)

With lookup Filter, we can filter opportunity data by account. In this case we show the opportunities that the Global Media account has.

Gantt Chart must be in a Record Page Tab



Month/Year Search Month

2023

Jan	Feb	Mar	Apr
May	Jun	Jul	Aug
Sep	Oct	Nov	Dec

Clear This month

Gantt Chart App

There are two available views.

Month View: We can search by month/year and will show us the data in that month.

Week View: We can select for an specific week (Monday-Sunday), the advantage of this view is that it can be seen better when data overlaps.

Week Search Week

January 2023

Week	Su	Mo	Tu	We	Th	Fr	Sa
1	1	2	3	4	5	6	7
2	8	9	10	11	12	13	14
3	15	16	17	18	19	20	21
4	22	23	24	25	26	27	28
5	29	30	31	1	2	3	4
6	5	6	7	8	9	10	11

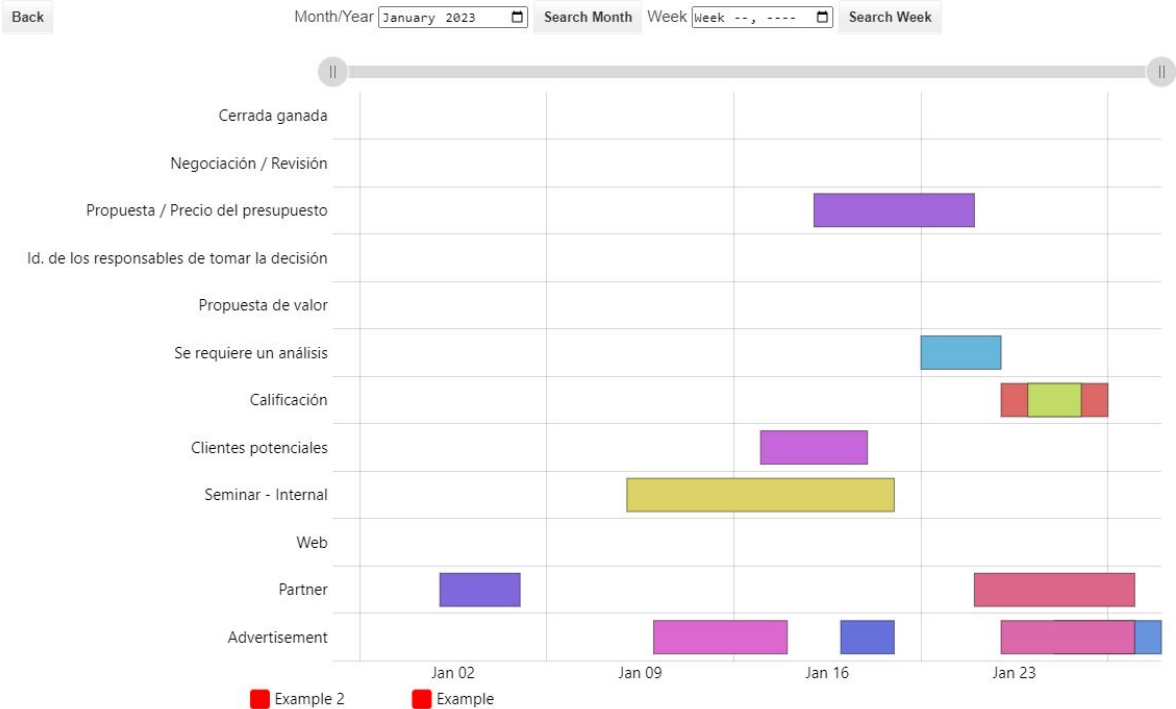
Clear This week

Month View

January 2023

Show all the data in that month and also at the bottom (Red) of the chart, will appear data that have Start Date = End Date.

GanttChart



Week View

Week 04, 2023

Show all the data in that week. In this case we have overlapping data, so we create a new row with the same name followed by a number.

GanttChart

Back

Month/Year

January 2023

Search Month

Week

week 04, 2023

Search Week



Other feature

At the top of the chart, there is a zoom bar. You can zoom in or out scrolling your mouse. The advantage of this, is when you zoom in, you can view the X Axis with more accurately.



You can click the zoom bar and move it and also you can click the button  and return to the normal view.

