Simple Sizing Checklist

By Cowsoft

- Instructions -

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Overview
The Simple Sizing checklist can be used to quickly size and break down user stories. By adding sizes to individual steps and updating the status of the steps, progress can be easily monitored by Project Managers.

Technical Overview
The solution adds three LWC components:

Component	API Name	Description
Simple Sizing Checklist - Custom Field	checklistBase	Allows admins to create a checklist field out of any custom or standard long text area
Simple Sizing Checklist	caseChecklist	Uses three fields included with the package to create a checklist for the Case object
	markupDiv	Not exposed – Used to allow inline formatting for the checklist

The solution also adds the following classes:

Class	Description
ChecklistController	Provides communication to the LWC. Handles requests for data and updates
ChecklistControllerTest	Test class to ensure ChecklistController is working as intended
ChecklistItem	Manages Splitting the checklist field into smaller objects (rows) and merging the rows in preparation for update

The following permission sets are also included:

Permission Set	Description
Simple Sizing Checklist Editor	Provides Edit access to the Simple Sizing Checklist Fields
Simple Sizing Checklist Viewer	Provides View access to the Simple Sizing Checklist Fields

Note: These permissions are not required to use the Simple Sizing Checklist with custom fields. For custom fields, the access will be based on the user's access to those fields, not based on these permission sets.

Note 2: If "Install for All Users" is selected during package installation, these permission sets will not need to be assigned, as users will already have access to these fields.

The following fields are also included:

Field	API Name	Description
Checklist	Case.cowsoft__Checklist__c	Stores the checklist data for the Simple Sizing Checklist
Estimated Size	Case.cowsoft__Estimated_Size__c	Updated via the Controller. Stores the Amount of effort estimated

Remaining Size	Case.cowsoft__Remaining_Size__c	Updated via the Controller. Stores the Amount of effort remaining (Incomplete + In Progress)

Setup

Package Installation

The solution can be installed through the Salesforce AppExchange. Please contact support@cowsoft.io if you have problems installing this package.

Simple Sizing Checklist

User Access

If the package is set to “Install for Admins Only” then non-admin users can be granted access to the Simple Sizing Checklist by providing them with the corresponding permission set:

Permission Set	**Description**
Simple Sizing Checklist Editor	Provides Edit access to the Simple Sizing Checklist Fields
Simple Sizing Checklist Viewer	Provides View access to the Simple Sizing Checklist Fields

Note: These permissions are not required to use the Simple Sizing Checklist with custom fields. For custom fields, the access will be based on the user’s access to those fields, not based on these permission sets.

If the package set to “Install for All Users” then most profiles should automatically be granted access to the necessary checklist fields. For other profiles, the above permission sets may be used, or existing profiles/permission sets can be updated to grant access to the three fields manually.

Adding the Component to a Checklist Page

The Simple Sizing Checklist can be added to a lightning page by:

1. Open the Case Lightning Record Page you wish to add the checklist to
2. Drag the Simple Sizing Checklist field onto the lightning page layout, where you’d like it
3. Save the page

You may also need to activate the page, depending on your org’s settings

Note: We also recommend adding the Estimated and Remaining size fields on to the applicable page layouts as read only, so that they can be summarized via Kanban views but still allow the Checklist component to control the values.

Simple Sizing Checklist – Custom Field

The custom field version of the Simple Sizing Checklist can added to any object that supports long text areas. It is also compatible with Standard fields, as long as they are long text areas

Creating a Custom Field

You can create a custom field for use by the Custom Checklist by:

1. Log into Salesforce
2. Navigate to Setup -> Object Manager
3. Open the object you wish to add the field to
4. Click “Fields & Relationships”
5. Click “New”

6. Select “Text Area (Long)” and click Next
7. Enter a Field Label and update any other fields as required
8. Click Next
9. Setup access and click Next
10. (Recommended) Deselect all layouts from which to add the field to
11. Click “Save”

You can also create custom fields for the sizing by following the same steps, but using “Number” instead for step 6.

Adding the Component to a Checklist Page

The Simple Sizing Checklist - Custom Field can be added to a lightning page by:

1. Open the Lightning Record Page you wish to add the checklist to
2. Drag the Simple Sizing Checklist field onto the page layout, where you’d like it
3. (Optional) Enter a title for the Component
4. Set the API name of the Checklist Field (Note: if using a custom field, make sure it ends with “__c”)
5. (Optional) add the API Names of the Sizing Fields
6. Save the page

You may also need to activate the page, depending on your org’s settings

Note: If the Checklist API name is invalid (or the wrong type), the checklist will not appear. Required Types:

Checklist Field – Long Text Area

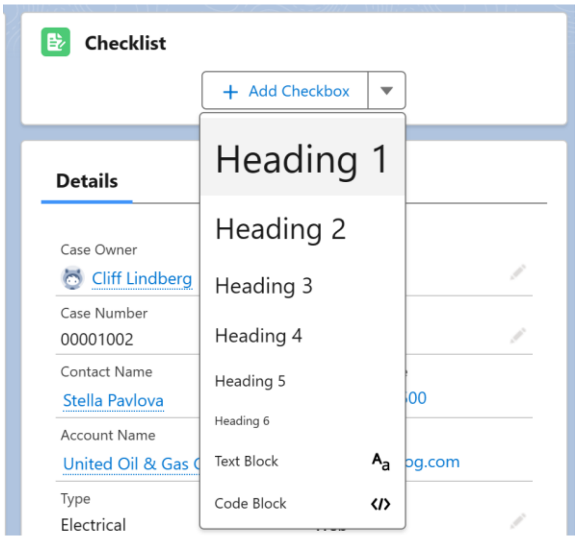
Sizing Fields – Number fields

Note: If the Estimated Size or Remaining Size are left blank, the checklist will still save and show the Estimated/Remaining size on the component but won’t save these values anywhere when the checklist is saved. Similarly, this won’t save if the user does not have the required access to update these fields.

Usage Instructions

Adding Checklist Items

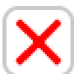
When opening the page, users will be shown a button to add a new checklist item, or a drop-down for other types of inputs:



Selecting any of these options will add a checklist item and enter Edit mode.

Checklist Item Status

Checklist items can be updated to the following statuses:

Status	**Symbol**	**Description**	**Counts for Estimated Size**	**Counts for Remaining Size**
Incomplete		Checklist item has not yet been started	Yes	Yes
Complete		Checklist item is finished	Yes	No
Optional		Checklist item is no longer required, but may be completed based on how much	No	No
In Progress		Checklist item has been started, but has not yet been completed	Yes	Yes
Cancelled		Checklist item is no longer required	No	No

These statuses can be toggled through by clicking on the symbol while in edit mode.

Saving the Checklist

In Edit Mode, the checklist can be saved by clicking “Save”

Hitting Cancel will return the Checklist to the original state before edits were made

Inline Formatting

Some inline formatting is supported by the solution (excluding for Code Blocks), as specified by [markdown guide]:

Element	Markdown Syntax
Bold	**Bold Text**
Italic	*Italicized Text*
Code	`Inline Code`
Strikethrough	~~Text with Strikethrough~~

Placing a backlash (\ ) in front of the markdown symbol will prevent it from being used for markdown. If a backslash is needed for another purpose, use two backslashes (\\ ). This does not affect Code Blocks (but does affect inline code blocks)

Upon hitting Save, the mark up will appear in the view mode.

Upgrading

To upgrade to the full version of this app (or to set your number of seats), please reach out to sales@cowsoft.io