



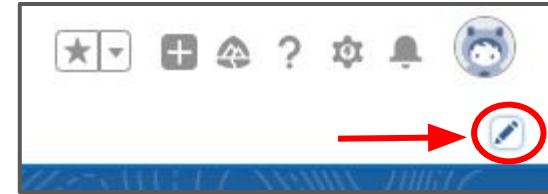
Gantt Chart

by Inforge

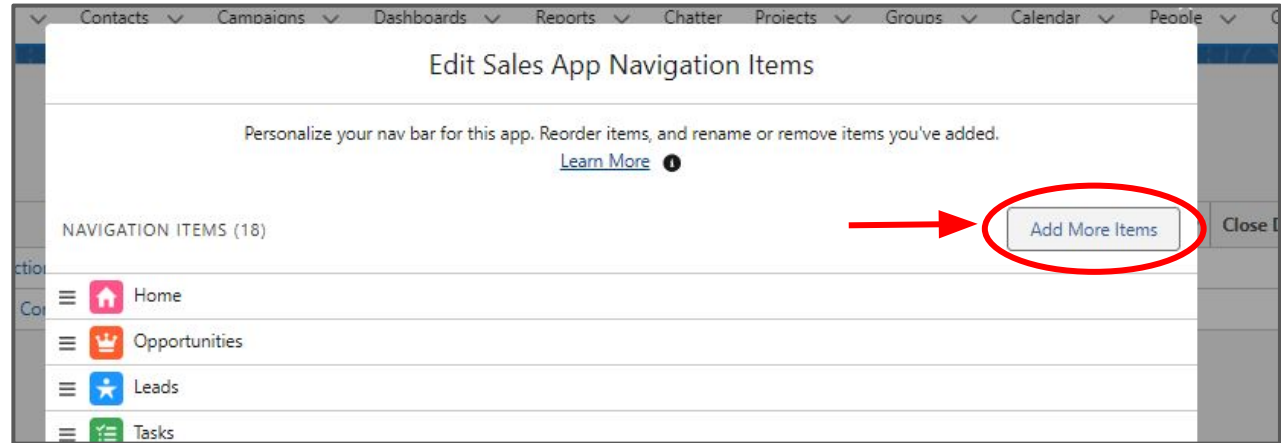
User manual of Gantt Chart App

- [Installation](#)
- [Gantt Chart Guide](#)
- [Example](#)
- [Tutorial Videos](#)

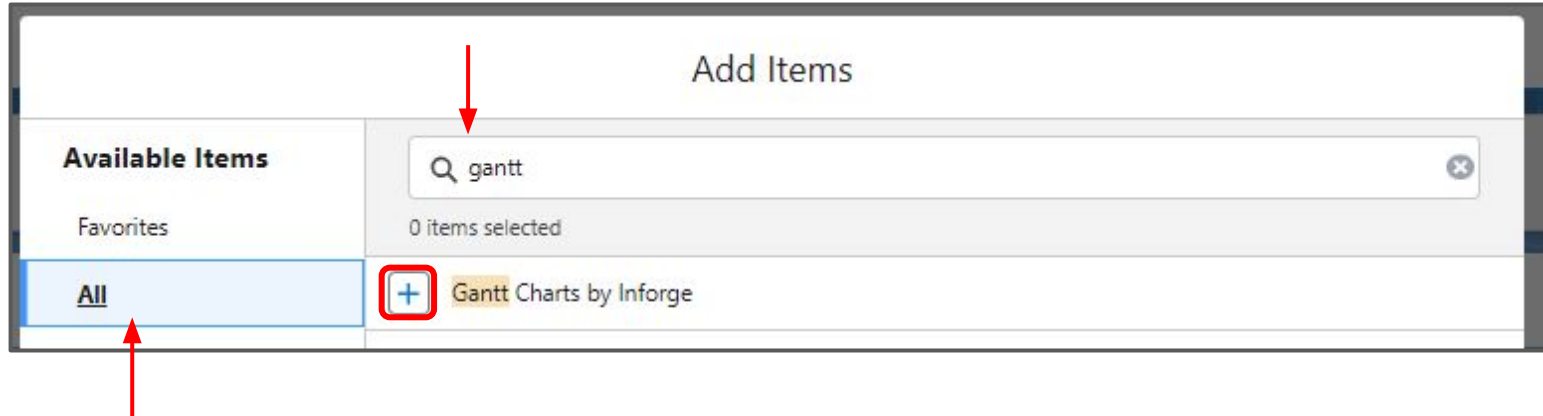
To use the application, we need to add it to the desired App. Click on the pencil in the upper right margin, below our User. And the following screen will appear.



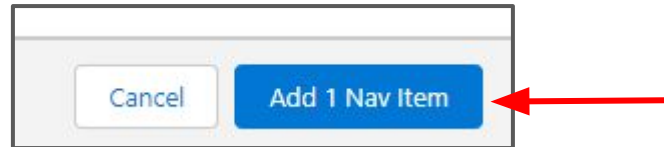
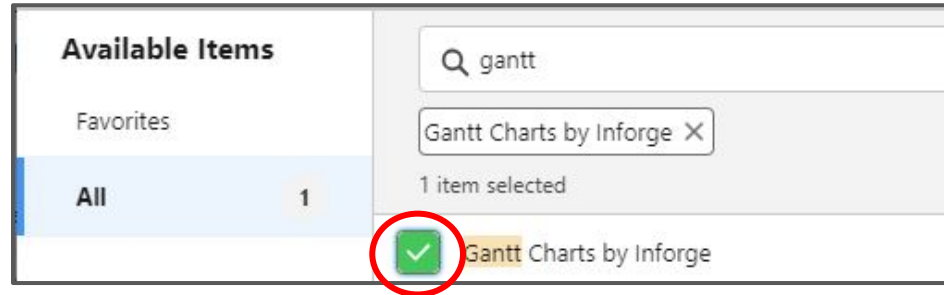
Click in "Add More Items"



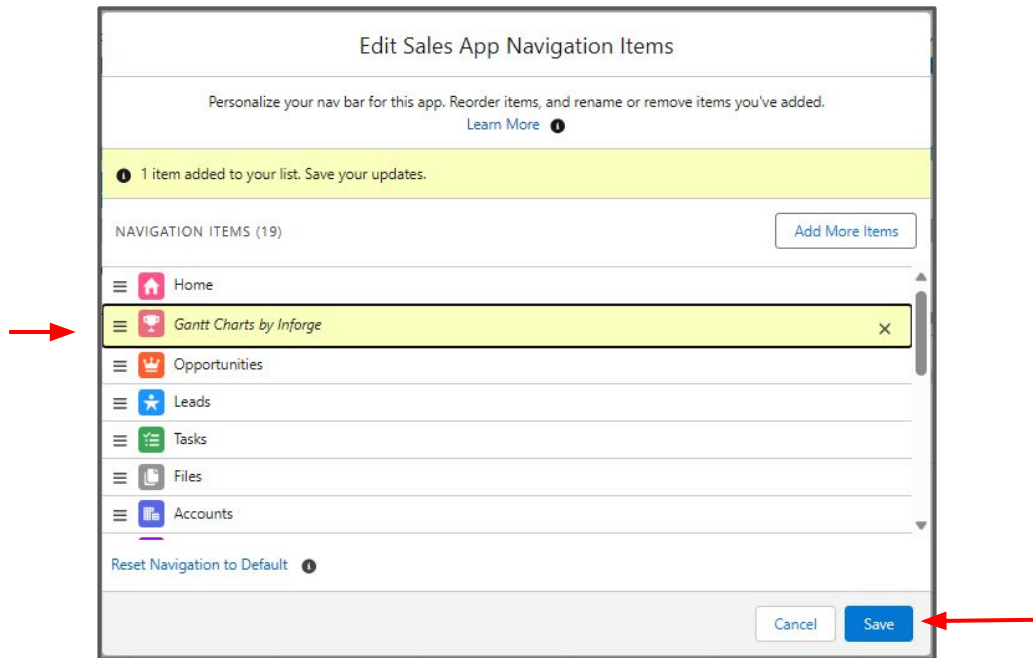
In the left column click on "All" and then in the search, type "Gantt". Our app "Gantt Charts by Inforge" will appear, click on "+" . Then it will show us a screen with all the visible tabs and finally we will be able to see ours.



When we click on "+", it will appear with a green check, this means that it is added. Finally we click on "Add 1 Nav Item" which is located below.



Once added in the tabs, we can drag and drop it to the desired position. In this case we will show it in the second position. Then click "Save" to save the changes.



Click on the tab and will show the App

SalesHomeGantt Charts by InforgeOpportunitiesLeadsTasksFilesAccountsContactsCampaignsDashboardsReportsChatterProjectsGroupsCalendarPeopleCasesForecastsProject Members

Gantt Charts by Inforge

*Gantt Chart Name ⓘ
Type a Name...

*Start ⓘ
Select an Option

*Display Name ⓘ
Select an Option

Filter By (Optional) ⓘ
Select an Option

Additional Description ⓘ
Available

*Main Object ⓘ
Select an Option

*End ⓘ
Select an Option

*Y Axis ⓘ
Select an Option

Selected

Save

INFORGE
Salesforce Specialists

Create Gantt Chart

* Gantt Chart Name ⓘ Type a Name...	* Main Object ⓘ Select an Option
* Start ⓘ Select an Option	* End ⓘ Select an Option
* Display Name ⓘ Select an Option	* Y Axis ⓘ Select an Option

Here we are going to create our first Gantt Chart. We will have to fill in the required fields.

- **Gantt Chart Name:** The 'Name' field is used to identify the application. It helps in distinguishing one application from another within the system.
- **Main Object:** The 'Main Object' is the object from which we are analyzing the data.
- **Start:** The 'Start' field requires a date or datetime entry. It signifies the starting point of the record, assisting in identifying when the particular record commenced.
- **End:** The 'End' field, similar to the 'Start' field, requires a date or datetime entry. It indicates the conclusion or end point of the record, aiding in determining when the record ended.
- **Display Name:** The 'Display Name' field defines the name of the chart when a user hovers over the data. It provides additional information about the data represented in the chart.
- **Y Axis:** The 'Y Axis' field determines the vertical axis in the application. Each record is displayed on the corresponding row within this axis.

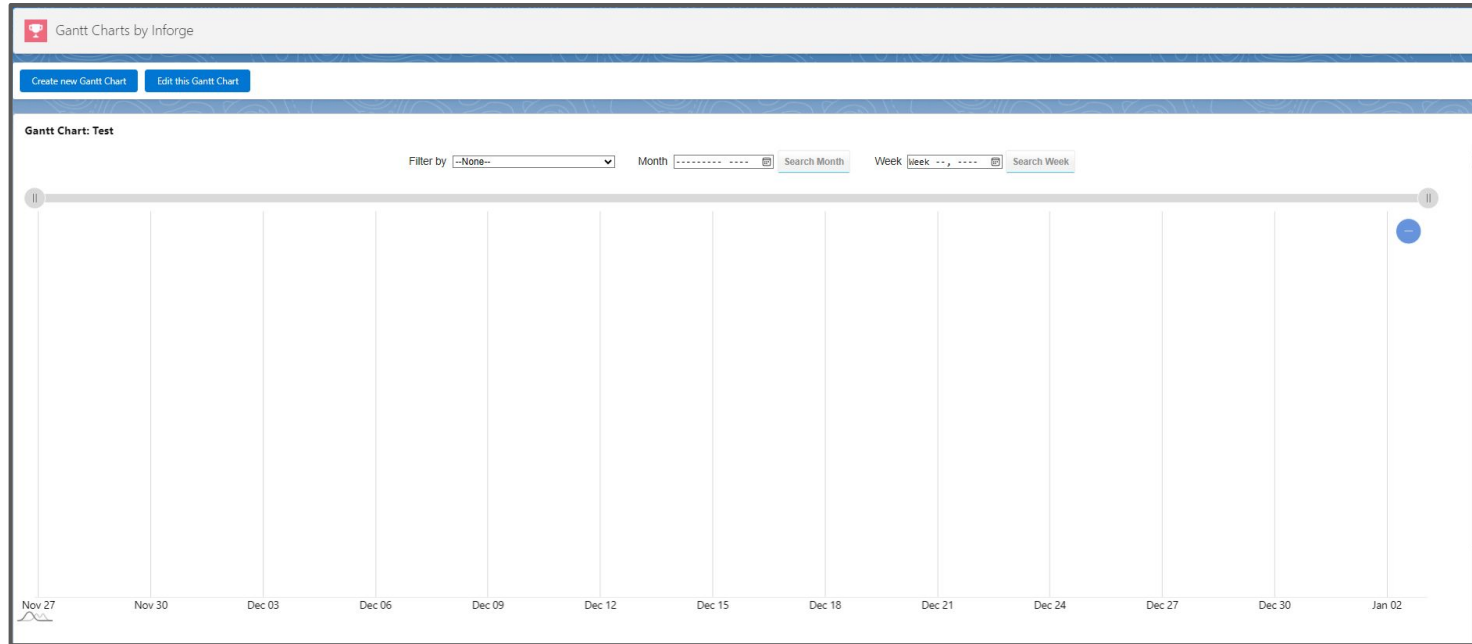
Create Gantt Chart

The screenshot displays a user interface for creating a Gantt chart. At the top, there is a section titled 'Filter By (Optional)' with an information icon. Below this is a dropdown menu with the text 'Select an Option'. Underneath the dropdown is a section titled 'Additional Description' with an information icon. This section contains two side-by-side text input fields. The left field is labeled 'Available' and the right field is labeled 'Selected'. Both fields are currently empty. There are small arrow icons between the two fields and on the right side of the 'Selected' field.

These are additional fields not required.

- **Filter by:** The 'Filter by' field allows you to apply a specific filter to the records that will be displayed. It dictates the values that will appear in the 'Filter by' picklist. For example, the main object may be Contact, and the 'Filter By' can be Account, so the Gantt Charts only show contacts from a specific account.
- **Description:** The 'Description Field' is optional. You can select the fields that will be displayed when hovering over the chart. It offers additional insights into the data represented in the chart.

Once we create our first Gantt chart, we click "Save" and we will be redirected to the App.





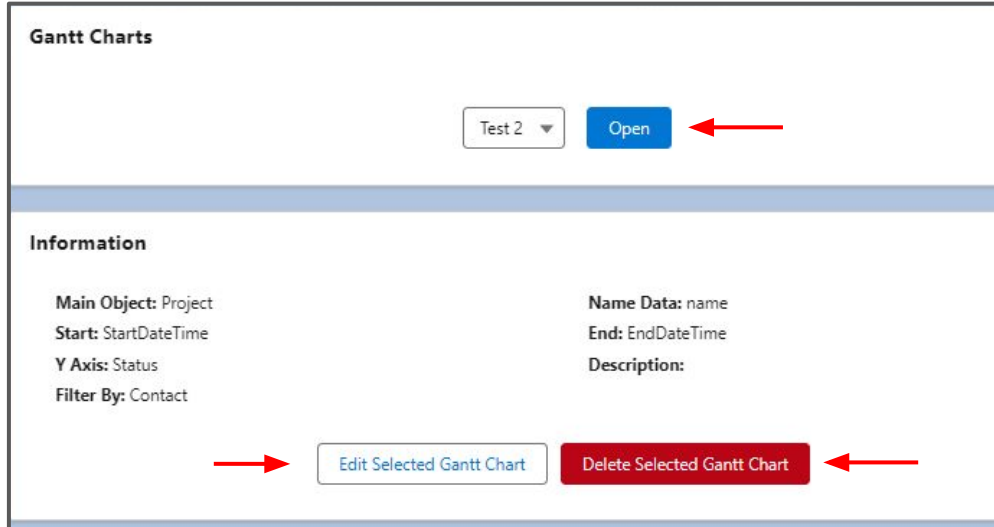
Two new buttons now appear. "Create new Gantt" and "Edit This Gantt Chart".

A screenshot of a web application titled 'Gantt Charts by Inforge'. The form contains several input fields and dropdown menus. On the left, there are fields for 'Gantt Chart Name' (with 'Test' entered), 'Start' (with 'StartDate' selected), 'Display Name' (with 'Name' selected), 'Filter By (Optional)' (with 'Account ID' selected), and 'Additional Description'. The 'Additional Description' section has two panes: 'Available' (listing Account ID, Campaign ID, Check to Test, Closed, Close Date, Contact ID) and 'Selected' (listing Amount). On the right, there are fields for 'Main Object' (with 'Opportunity' selected), 'End' (with 'End DateTime' selected), and 'Y Axis' (with 'Stage' selected). At the bottom right, there are 'Cancel' and 'Save' buttons.

- "Create new Gantt Chart" will redirect us to the previous screen to create a new Gantt Chart.
- In "Edit this Gantt Chart", we will be able to modify our current Gantt Chart, we can change the fields of the Start, Y axis, or any modification we want. If we do not want to modify, to not save the changes we click on "Cancel".

If we create another gantt chart, we will be redirected to a new view where we can choose between the number of Gantt Charts created.

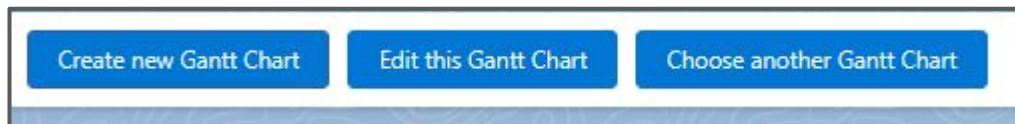
In this part we will be able to see how our Gantt chart is set up and all its information.



The screenshot displays a web interface for managing Gantt Charts. At the top, under the heading "Gantt Charts", there is a dropdown menu currently set to "Test 2" and a blue "Open" button. A red arrow points to the "Open" button. Below this is a horizontal separator line. Under the heading "Information", there are two columns of text. The left column contains: "Main Object: Project", "Start: StartDateTime", "Y Axis: Status", and "Filter By: Contact". The right column contains: "Name Data: name", "End: EndDateTime", and "Description:". At the bottom of the interface, there are two buttons: a light blue "Edit Selected Gantt Chart" button and a red "Delete Selected Gantt Chart" button. Red arrows point to both of these buttons.

- **Open Button:** In this button, select the option that is selected and it will take us to the App to use this Gantt Chart.
- **Edit Selected Gantt Chart:** This button allows us to edit the selected gantt chart.
- **Delete Selected Gantt Chart:** This button is used to delete the selected Gantt Chart.

After having two or more Gantt Charts, a new button "Choose another Gantt Chart" will appear.



If we select "choose another Gantt Chart" we can go to the previous screen and choose among the different Gantt Charts that have been created.

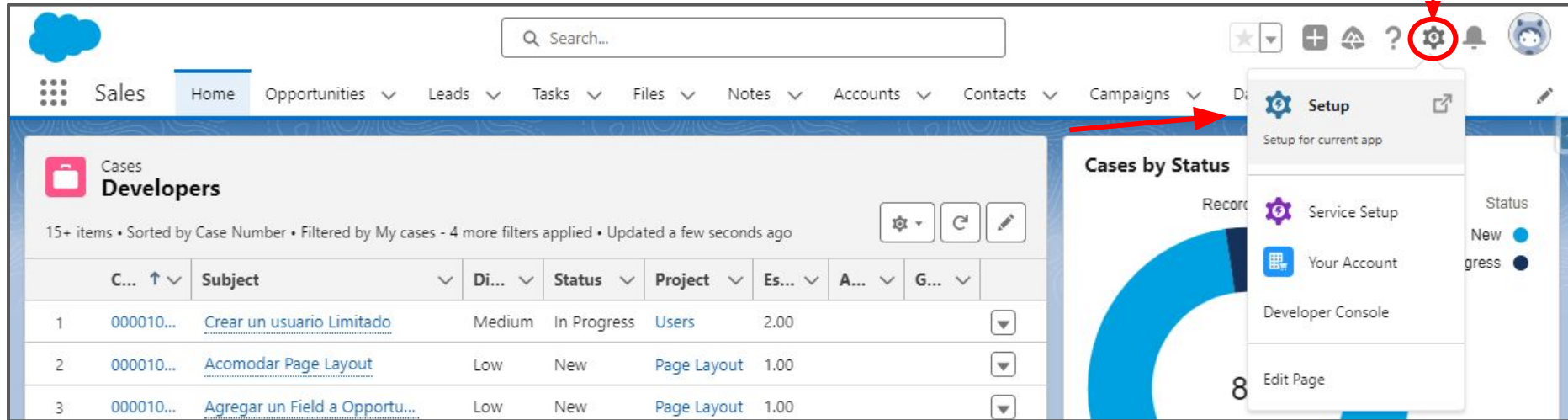
Example (Opportunities)

If we want to see the opportunities we have in a specific month or week, we can set our Gantt chart to show this data according to the Stage they are in at the moment. It is also possible to filter them according to the account they belong to. In addition, if we want more information, for example, the amount, probability and Expected Amount, we can add it in the “Description” field and it will be shown when we pass the mouse over the Record.

A fact to keep in mind is that our opportunities need to have a start and end date, this is so that our Gantt Chart knows in which time interval they are.

We will take advantage of the fact that Opportunity has a “Close Date” and we will create a “Start Date” for a better example.

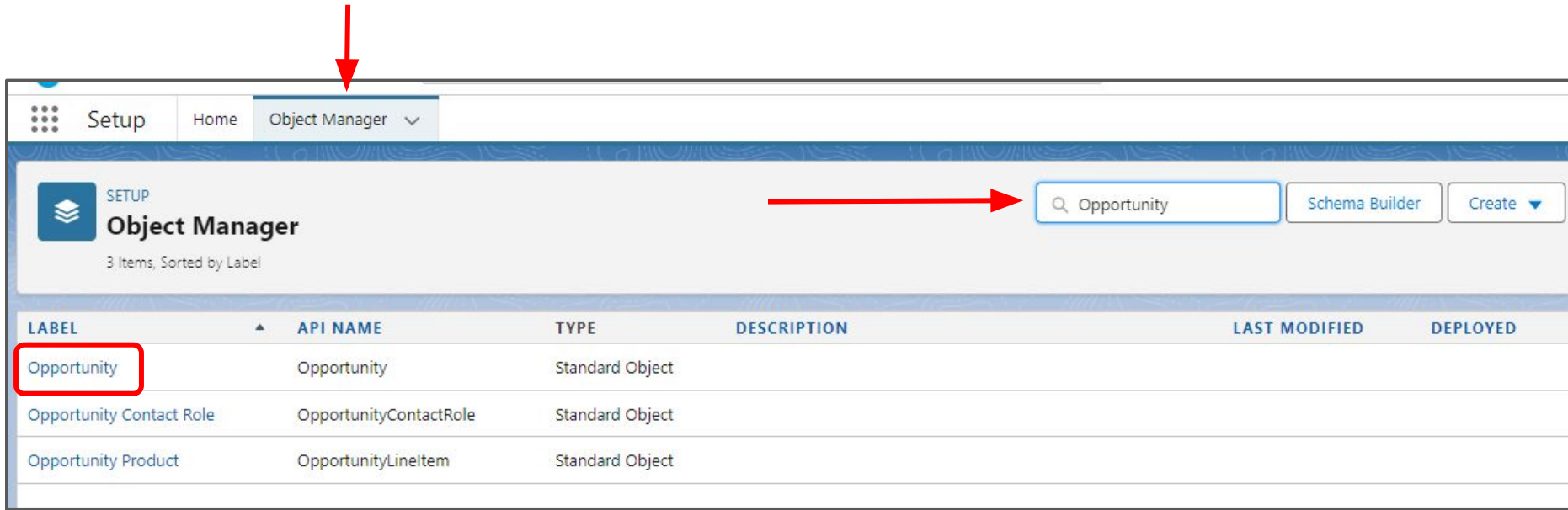
Inside Salesforce, click on the setting icon, then click on "Setup".



The screenshot shows the Salesforce user interface. At the top, there is a search bar and a navigation bar with tabs for Sales, Home, Opportunities, Leads, Tasks, Files, Notes, Accounts, Contacts, and Campaigns. A red circle highlights the settings gear icon in the top right corner. A red arrow points from this icon to the 'Setup' option in the dropdown menu that appears. The dropdown menu includes options like 'Setup for current app', 'Service Setup', 'Your Account', 'Developer Console', and 'Edit Page'. On the left side, there is a 'Cases Developers' section with a table of cases. The table has columns for Case Number, Subject, Priority, Status, Project, and Escalation Time. The first three rows of the table are visible.

C...	Subject	Di...	Status	Project	Es...	A...	G...
1	000010... Crear un usuario Limitado	Medium	In Progress	Users	2.00		
2	000010... Acomodar Page Layout	Low	New	Page Layout	1.00		
3	000010... Agregar un Field a Oportu...	Low	New	Page Layout	1.00		

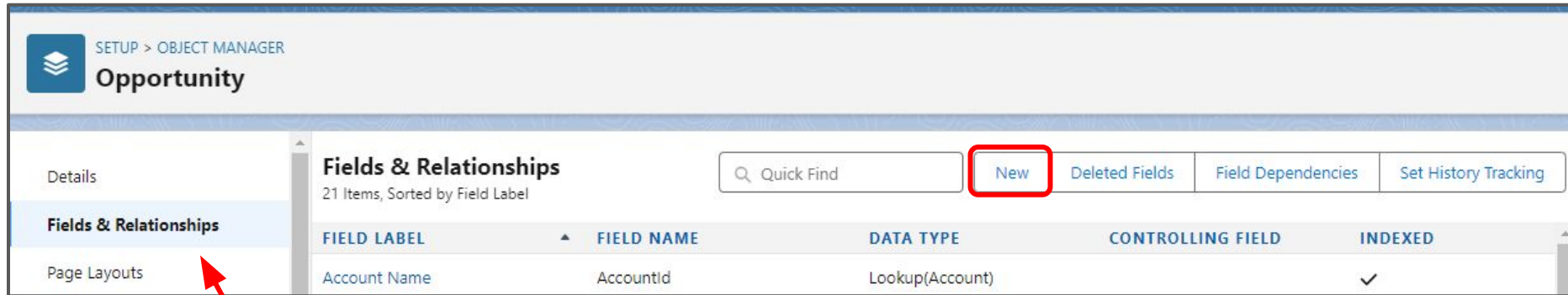
Inside Setup, click on "Object Manager" and in that section, in the search engine, type "Opportunity" to search for our "Main Object". And click on "Opportunity".



The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The 'Object Manager' section is active, displaying a search bar with 'Opportunity' entered. Below the search bar, a table lists three objects. The first row, 'Opportunity', is highlighted with a red box. The table columns are: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Opportunity	Opportunity	Standard Object			
Opportunity Contact Role	OpportunityContactRole	Standard Object			
Opportunity Product	OpportunityLineItem	Standard Object			

Once we are in the "Opportunity" object, we go to the "Fields & Relationships" section and then click on "New".



SETUP > OBJECT MANAGER

Opportunity

Details

Fields & Relationships

21 Items, Sorted by Field Label

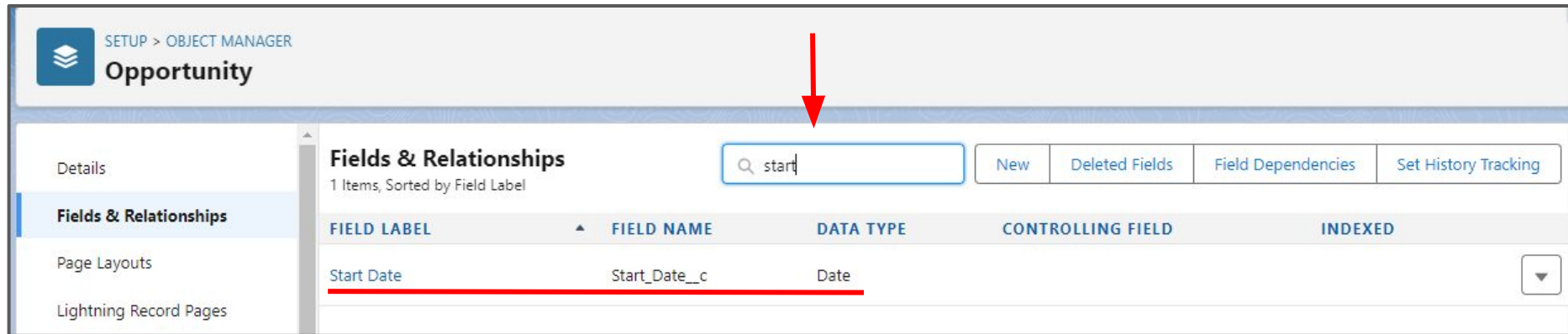
Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account Name	AccountId	Lookup(Account)		✓

1. Data type: Date and click "Next"
2. Field Label: "Start Date" and Field Name auto populates, then click "Next"
3. For our purpose, let's check "Visible" and checks all the profiles rows.
4. Click "Save".

If we search the new field will be appear.



SETUP > OBJECT MANAGER
Opportunity

Details

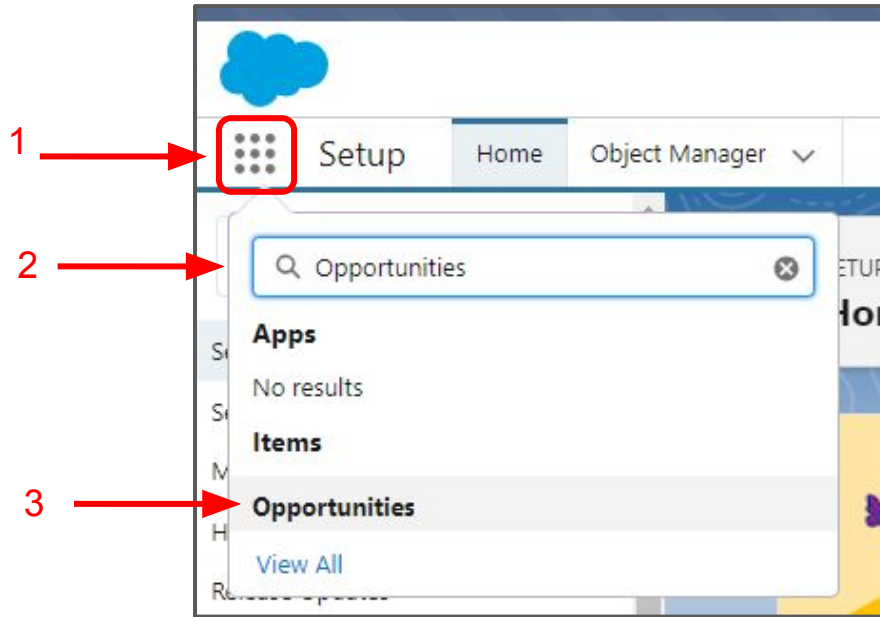
Fields & Relationships
1 Items, Sorted by Field Label

Search:

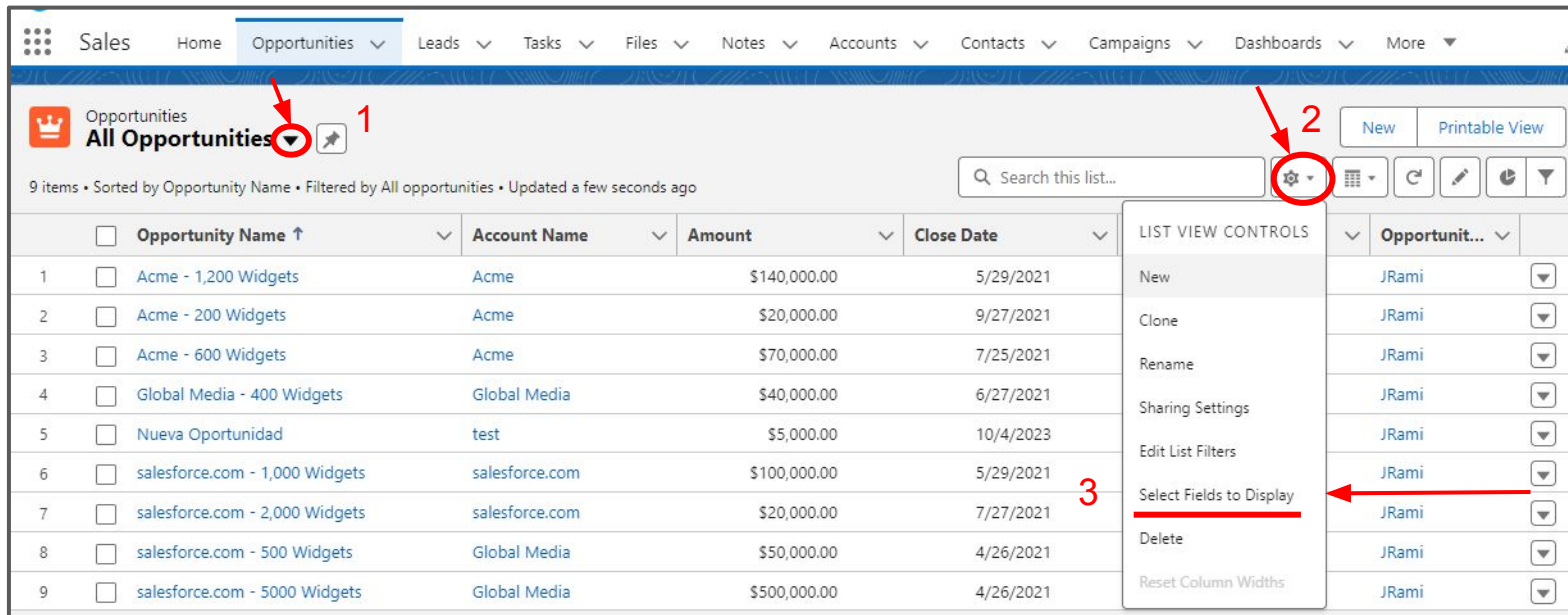
New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Start Date	Start_Date__c	Date		

Now, we are going to modified the opportunities records. Click on the launcher icon and type on the search bar "Opportunities". After, click on the "Opportunities" suggestion and it will take you to the Opportunities List.



Probably when we are in the Opportunities list, it will show “Recently Viewed” List, we need to show all our Opportunities. So, click on the icon  and select “All Opportunities” List and will show like this. After that, we have to add “Start Date” field to the list, this is so that we can modify the records we want to show in the Gantt Chart. Click on the Setting Icon and it will display all the options, click on “Select Fields to Display”



The screenshot shows the Salesforce interface with the 'Opportunities' tab selected. The page title is 'Opportunities All Opportunities' with a dropdown arrow icon (1). The list contains 9 items, sorted by Opportunity Name. The table columns are Opportunity Name, Account Name, Amount, and Close Date. The table data is as follows:

	Opportunity Name ↑	Account Name	Amount	Close Date
1	Acme - 1,200 Widgets	Acme	\$140,000.00	5/29/2021
2	Acme - 200 Widgets	Acme	\$20,000.00	9/27/2021
3	Acme - 600 Widgets	Acme	\$70,000.00	7/25/2021
4	Global Media - 400 Widgets	Global Media	\$40,000.00	6/27/2021
5	Nueva Oportunidad	test	\$5,000.00	10/4/2023
6	salesforce.com - 1,000 Widgets	salesforce.com	\$100,000.00	5/29/2021
7	salesforce.com - 2,000 Widgets	salesforce.com	\$20,000.00	7/27/2021
8	salesforce.com - 500 Widgets	Global Media	\$50,000.00	4/26/2021
9	salesforce.com - 5000 Widgets	Global Media	\$500,000.00	4/26/2021

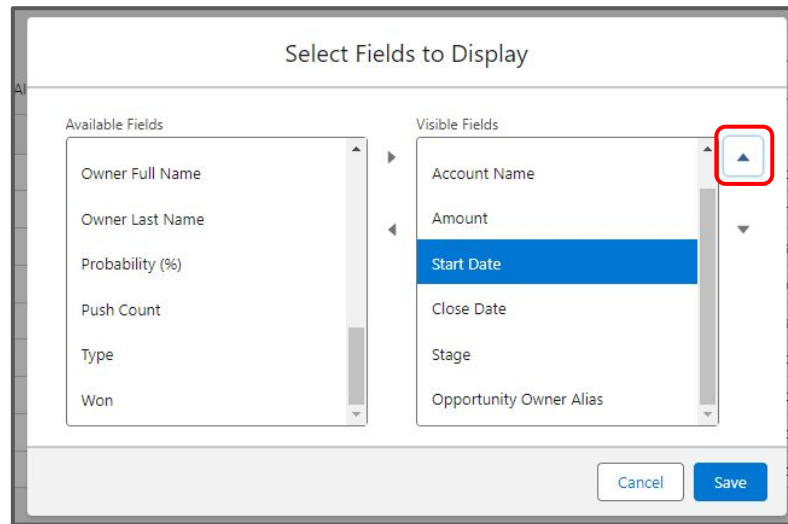
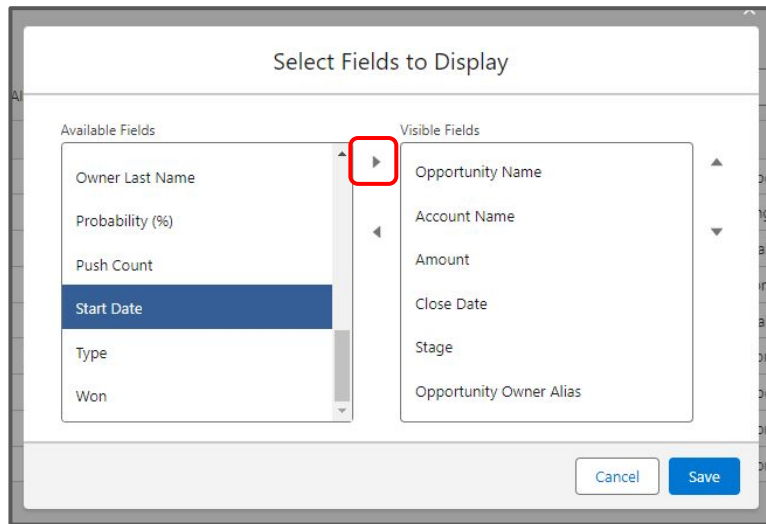
Annotations: 1 points to the 'All Opportunities' dropdown arrow. 2 points to the settings gear icon. 3 points to the 'Select Fields to Display' option in the settings menu.

LIST VIEW CONTROLS

- New
- Clone
- Rename
- Sharing Settings
- Edit List Filters
- Select Fields to Display
- Delete
- Reset Column Widths

In this section, will show all the Opportunities fields that are available and visible in the List. We have to move "Start Date" from "Available" to "Visible".

First search "Start Date" in the Available Fields, click it and click  to move to "Visible Fields". After that, we can move up and down in the List. So, search "Start Date" in the Visible Fields, click on  and move it above "Close Date". Click "Save"



Then “Start Date” will show next to “Close Date”, now we can edit the records that we want to display in our Gantt Chart.

 Opportunities
All Opportunities  

9 items • Sorted by Opportunity Name • Filtered by All opportunities • Updated a few seconds ago

 Search this list...

	☐ Opportunity Name ↑	Account Name	Amount	Start D...	Close Date	Stage	Opportu...	
1	☐ Acme - 1,200 Widgets	Acme	\$140,000.00		5/29/2021	Value Proposition	JRami	
2	☐ Acme - 200 Widgets	Acme	\$20,000.00		9/27/2021	Prospecting	JRami	
3	☐ Acme - 600 Widgets	Acme	\$70,000.00		7/25/2021	Needs Analysis	JRami	
4	☐ Global Media - 400 Widgets	Global Media	\$40,000.00		6/27/2021	Id. Decision Makers	JRami	
5	☐ Nueva Oportunidad	test	\$5,000.00		10/4/2023	Needs Analysis	JRami	
6	☐ salesforce.com - 1,000 Widgets	salesforce.com	\$100,000.00		5/29/2021	Negotiation/Review	JRami	
7	☐ salesforce.com - 2,000 Widgets	salesforce.com	\$20,000.00		7/27/2021	Value Proposition	JRami	
8	☐ salesforce.com - 500 Widgets	Global Media	\$50,000.00		4/26/2021	Closed Won	JRami	
9	☐ salesforce.com - 5000 Widgets	Global Media	\$500,000.00		4/26/2021	Closed Won	JRami	

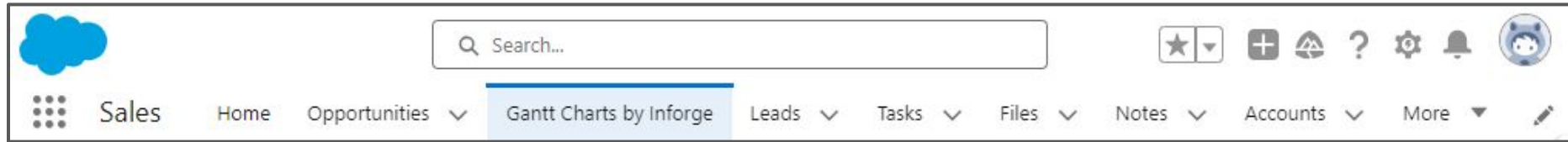
We have to take into account that all the records that will be shown in the application must have a start date prior to the closing date or perhaps the same day. Therefore, we will modify the records according to this criterion. Click on the pencil icon and modify "Start date" and "Close date". Then, click "Save".

Search this list...	
Start D...	Close Date
	5/29/2021
	9/27/2021
	7/25/2021
	6/27/2021
	10/4/2023
	5/29/2021
	7/27/2021
	4/26/2021
	4/26/2021



Start Date	Close Date
11/1/2023	11/10/2023
11/4/2023	11/11/2023
11/6/2023	11/18/2023
11/6/2023	11/6/2023 
11/7/2023	11/14/2023
11/4/2023	11/10/2023
11/19/2023	11/27/2023
11/22/2023	11/26/2023
11/21/2023	11/29/2023

As we have already installed our App, let's create our Gantt Chart. Click on "Gantt Charts by Inforge" and it will allow you to configure this setting.



This is the Gantt Chart we are going to use in this Example.

* Gantt Chart Name ⓘ

Opportunity Gantt Chart

* Start ⓘ

Start Date

* Display Name ⓘ

Name

Filter By (Optional) ⓘ

Account ID

* Main Object ⓘ

Opportunity

* End ⓘ

Close Date

* Y Axis ⓘ

Stage

Additional Description ⓘ

Available

Private

Push Count

Quantity

Stage

Start Date

Won

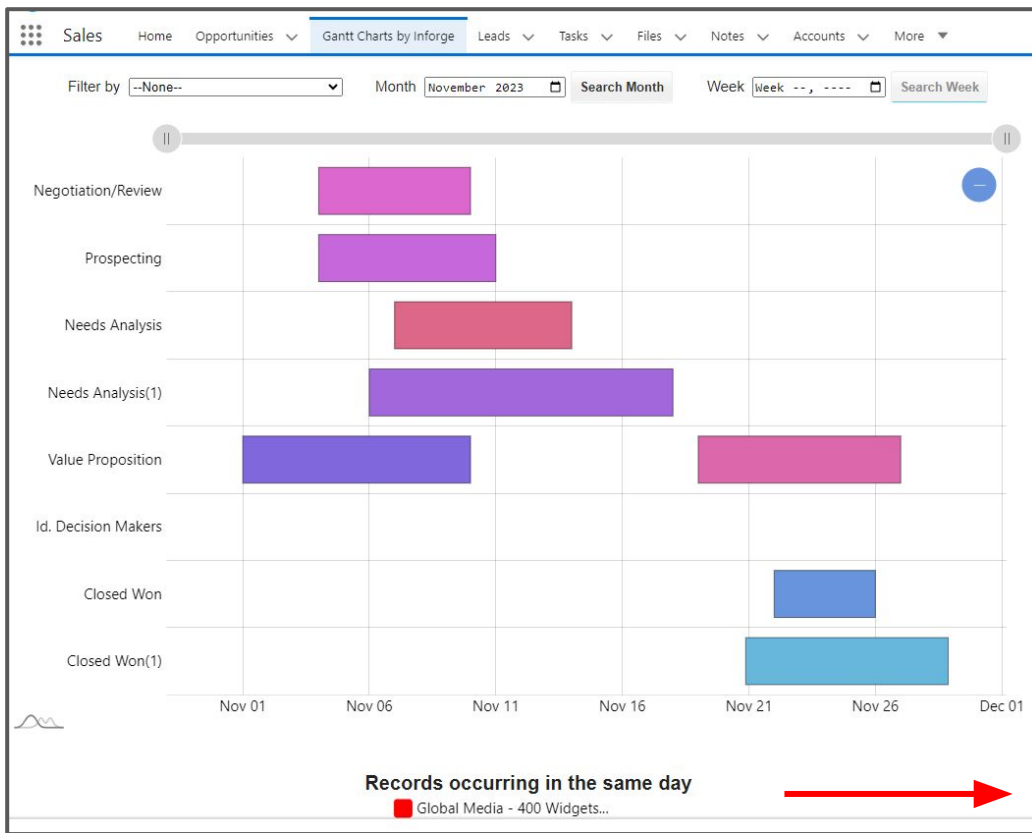
Selected

Amount

Expected Amount

Probability (%)

Save



As we have modified all the records with dates in November 2023, when we search with "Month" and click on November 2023, then the application will show all the data related to that Month.

Something to keep in mind, if any date is shown at the bottom in the "Records Occurring in the same day", it is when a record has start and end on the same day, so, the application identifies this record and it is shown in this section.

Example (Opportunities)

Needs Analysis	Acme - 600 Widgets 2023-11-6 - 2023-11-18 (Amount: 70000.00, Expected Amount: 14000.00, Probability (%): 20)
Needs Analysis(1)	

If we hover the mouse over the record we are interested in, we will be able to see the information we added in our Description.

The "Filter By" we can filter according to the Filter we set in our Gantt Chart. In this case, shows all the accounts that belong to the opportunities.

Filter by --None--

- None--
- Acme
- Global Media
- ricky accounts
- salesforce.com
- Sample Account for Entitlements
- test

Month November 2023

Search Month

negotiation/Re

Filtering by "Acme"

