Grid Chart detailed configuration:

The Grid chart type designed to view salesforce records on a Grid allowing to manipulate values by dragging child records between unique values of the child field as well as edit multi records using the popup feature.

Usage example: changing the opportunity Stage Name in multi-records UX

Parent sObject records Parent Left-Side Fields (Config line 27)

Child sObject records title (Config line 39)

Unique Values retrieved from Child sObject field (Config line 35)

	Draft	Qualification	Negotiation	
User Name 1	Opportunity Name Close Date Value $			
		Opportunity Name Close Date Value $		
User Name 2		Opportunity Name Close Date Value $		

Grid Chart Configuration for the chart above using standard Salesforce objects.

#- Field Name	Values	Description	Example Value
1: Component Planner Type	Picklist: GANTT, SCHEDULER, GRID, MATRIX	Scheduler: Date/time timeline, Stacking or overlapping child records on the same parent. Gantt: Date/time Linking records that have references to each other. Grid: Child sObject field unique values as the timeline, Stacking or overlapping child records on the same parent. Matrix – Sobject field as a timeline, assign child records to additional lookup Sobject.	GRID
2: Component Planner Height	Integer (Min 250)	Component height in pixels in the page	500
3: Component Load More Scale	Integer (5 is min)	Number of Parents records to load at once (Use to Improve load times in case of big	15

		objects	
4: Component Show Color Legends	Picklist: YES / NO	Define the component to display legends. If Yes, Child Color Field (47) must be filled.	YES
5: Component Title	Text	Title to be shown at the top left of the component.	Opportunity Grid Chart
6: Component Title Size	Integer (12 - 48)	Font Size of the Title.	22
7: Component Icon	Picklist	Select an icon from the lightning design system to use next to the chart.	Opportunity
8: Component Icon Size	Picklist: SMALL, MEDIUM, LARGE	Icon size can be customized to: Small / Medium / Large	MEDIUM
23: Parent sObject	Text	Parent sObject source of records	User
24: Parent Must-Have Childs	Picklist: Yes, No	Filter out Parents without Child records	No
25: Parent Initial Filter	Picklist: No, PageID, UserID	Allow to use PageID to filter by Record Page or Logged-in user Id	No
26: Parent Initial Filter Field	Text	Field to be used as initial filter for the parent sObject with the Page Record Id or Logged-in User (Line– 25) Ex. OwnerId in case of filter Event by UserId	
27: Parent Left-Side Fields	Text	Fields names to be used as a label on the first column on the left.	Name
28: Parent Search Fields	Text	Fields to be used only as quick filter and the advanced filter, but not to be displayed.	
29: Parent Filter Statement	Text	Define a filter statement to be used with the specified parent sObject (Ex. ID, RecordType, etc.)	ProfileId = 'a0K1U000004K6aUUAS'
30: Child sObject	Text	Child sObject source of records	Opportunity
31: Child Initial Filter	Picklist: No, PageID,	Allow to use PageID to filter by Record Page or Logged-in user Id	No

	UserID		
32: Child Initial Filter Field	Text	field to be used as initial filter for the Child sObject with the Page Record Id or Logged-in User (Line-31)	
33: Child Custom Relationship	Picklist: YES / NO	Use a child sObject to use a custom relationship with the parent sObject.	YES
34: 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
35: Child Grid Timeline Field	Test	The field from Child sObject to create the timeline in Grid mode. All unique values from child records	StageName
39: 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, Account.Name, Amount
40: 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, CloseDate, NextStep, Probability
41: Child Start Field	Text	Field to be used as the start date of the specified child sObject (Date or DateTime field can be used)	
42: Child End Field	Text	Field to be used as the end date of the specified child sObject (Date or DateTime field can be used)	
43: Child Filter Statement	Text	Define a filter statement to be used with the specified child sObject	
44: Child Sort Field	Text	Field to sort Child records by when using Scheduler chat Type.	CloseDate
45: Child Sort Direction	Picklist: ASC, DESC	Using Child field (44) to sort the child records	ASC
46: Child Progress Field	Text	Field to be used to set the progress of the child record. (Limit to 0.0 – 1.0) This will display a gradient color to represent progress)	

47: Child Color Field	Text	Used as the reference field value to relate to the Child Color Matrix configuration	Type
48: Child Color Matrix	Text	Define an array of keys and values to be used with the Child Color Field. Formatting must be: [{'key': '1st Child Color Field Value', 'value': 'red'}, {'key': '2nd child color field value', 'value': '#404040'}]	[{"key":"New Business","value":"#2A9D8F"},{"key":"Existing Business","value":"#FFAC81"}]
68: Childs Can Be Created	Picklist: YES / NO	Allow Child record creation using double-click on the grid, using the popup field to create the record	YES (If you like to enable record creation, select NO to disable)
69: 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 grid allocation	YES
70: Child Read Only	Picklist: YES, NO, REVIEW, CONFIRM	Yes - the user will not be able to drag or edit the record. NO—User can move and resize records instantly Review—User can drag and resize, but record not saved. Confirm—User can modify data, but receive save conformation before save.	NO