

Checklist Manager

User Guide

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Overview

Checklist manager is a lightning component which is used to show a checklist (to-do list) of action items on any object record page.

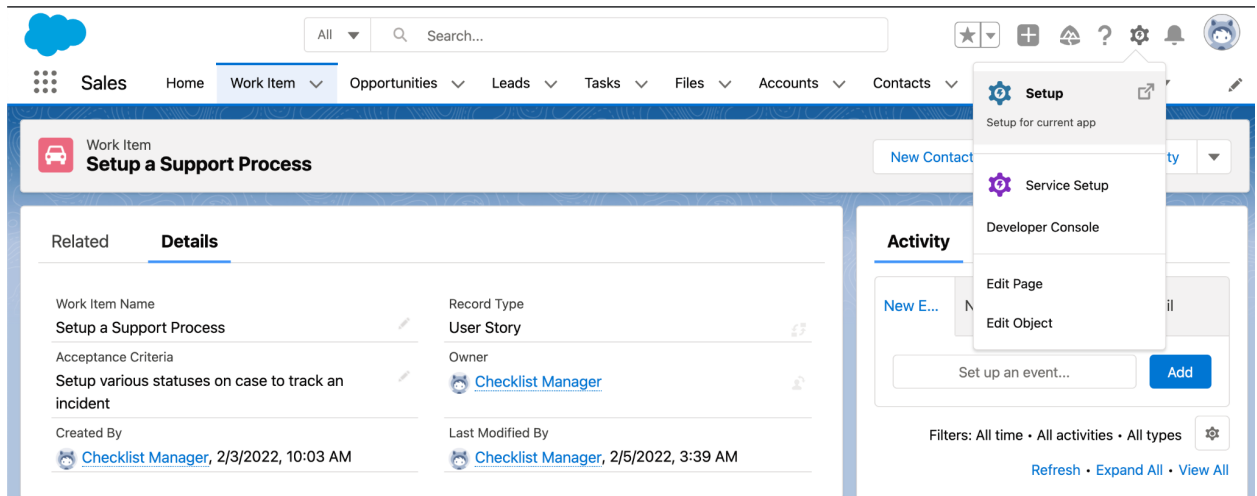
This checklist can be updated by clicking the buttons available next to checklist items to track completion of checklist items.

Key Highlights

- Easy way to show checklist items on different object record pages based on record types.
- Easy way to track completion of action items.

Configure Checklist Manager on object record page

1. Open any record in lightning and click on “Edit Page” from the settings icon to open lightning app builder page



- On the lightning app builder page search for “**checklistmanager**” and drag on drop the “**checklistmanager**” component on to your page and save.

The screenshot shows the Lightning App Builder interface for editing a 'Work Item Record Page'. The 'Components' panel on the left has a search bar with 'checklistmanager' entered, showing one result under 'Custom - Managed'. The main canvas displays a 'Setup a Support Process' record page. On the right side of the page, a 'Checklist Manager' component is visible, showing a progress bar and a table of checklist items. The right sidebar contains 'Set Component Visibility' and 'Filters' options.

- Open the record page and the checklist manager should be visible on the record

The screenshot shows the Lightning App Builder interface for viewing a 'Work Item Record Page'. The 'Checklist Manager' component is visible on the right side of the page, showing a progress bar and a table of checklist items. The table has columns for 'S.No.', 'Checklist Item', and 'Completed'. The 'Completed' column has buttons for 'Yes', 'No', and 'NA'.

The screenshot shows the Lightning App Builder interface for viewing a 'Work Item Record Page'. The 'Checklist Manager' component is visible on the right side of the page, showing a progress bar and a table of checklist items. The table has columns for 'S.No.', 'Checklist Item', and 'Completed'. The 'Completed' column has buttons for 'Yes', 'No', and 'NA'.

Configure checklist items to show on object record page

1. Goto → Setup → Custom Metadata Types and search for “**Checklist Manager**”

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'custom me' and a list of categories including 'Custom Metadata Types'. The main content area is titled 'Custom Metadata Types' and shows a table of results. The table has columns: Action, Label, Installed Package, Namespace Prefix, Visibility, API Name, Record Size, and Description. One record is shown for 'Checklist Manager' with API Name 'checkman__Checklist_Manager__mdt' and Record Size '906'. A 'Manage Records' link is visible next to the record.

Action	Label	Installed Package	Namespace Prefix	Visibility	API Name	Record Size	Description
Manage Records	Checklist Manager	Checklist Manager	checkman	Public	checkman__Checklist_Manager__mdt	906	

2. Click on “Manage Records” next to “**Checklist Manager**”

The screenshot shows the Salesforce Setup interface for the 'Checklist Manager' record. The left sidebar is the same as the previous screenshot. The main content area is titled 'Checklist Manager' and shows a table with columns: Label, Checklist Manager Name, Namespace Prefix, Record Type - Developer Name, Checklist Item, and Object API. The table is currently empty, displaying 'No records to display.' A 'New' button is visible in the top right corner of the table area.

Label	Checklist Manager Name	Namespace Prefix	Record Type - Developer Name	Checklist Item	Object API
No records to display.					

3. Create records by clicking on the “New” button.
 - a. Enter any label
 - b. Enter Object API
 - c. Enter Record Type Developer name only if you have record types on your object.
 - d. Enter checklist item
 - e. Enter the order in which you want to display checklist items

Setup

Home

Object Manager

custom me

Custom Code

Custom Metadata Types

Didn't find what you're looking for? Try using Global Search.

SETUP

Custom Metadata Types

Checklist Manager

Help for this Page

Checklist Manager Edit

Save Save & New Cancel

Information

= Required Information

Label

Work Item - User Story

Protected Component

Checklist Manager Name

Work_Item_User_Story

Object API

Work_Item__c

Record Type - Developer Name

User_Story

Checklist Item

Please verify if acceptance criteria is refined

Order

1

Save Save & New Cancel



SETUP

Custom Metadata Types

Checklist Manager

[Help for this Page](#)

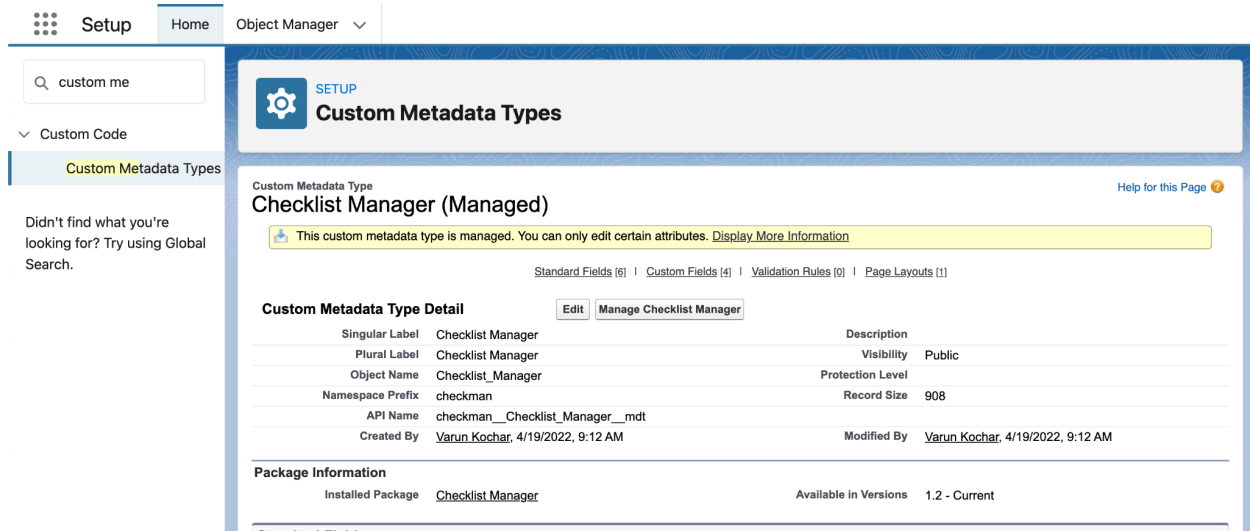
View: All Fields [Edit](#) | [Create New View](#)

Action	Label	Checklist Manager Name	Namespace Prefix	Record Type - Developer Name	Checklist Item	Object API
Edit Del	Work Item Bug	Work_Item_Bug_1		Bug	Please verify if steps to replicate are provided.	Work_Item__c
Edit Del	Work Item Bug	Work_Item_Bug_2		Bug	Please add test evidence before closing the bug.	Work_Item__c
Edit Del	Work Item-User Story	Work_Item_User_Story_1		User_Story	Please verify if acceptance criteria is refined.	Work_Item__c
Edit Del	Work Item-User Story	Work_Item_User_Story_2		User_Story	Please run security scan on your code	Work_Item__c

Note :

If you are upgrading the package then you may not find all fields on the layout. Please follow below steps to add all fields on the layout

1. Goto → Setup → Custom Metadata Types and search for “Checklist Manager”

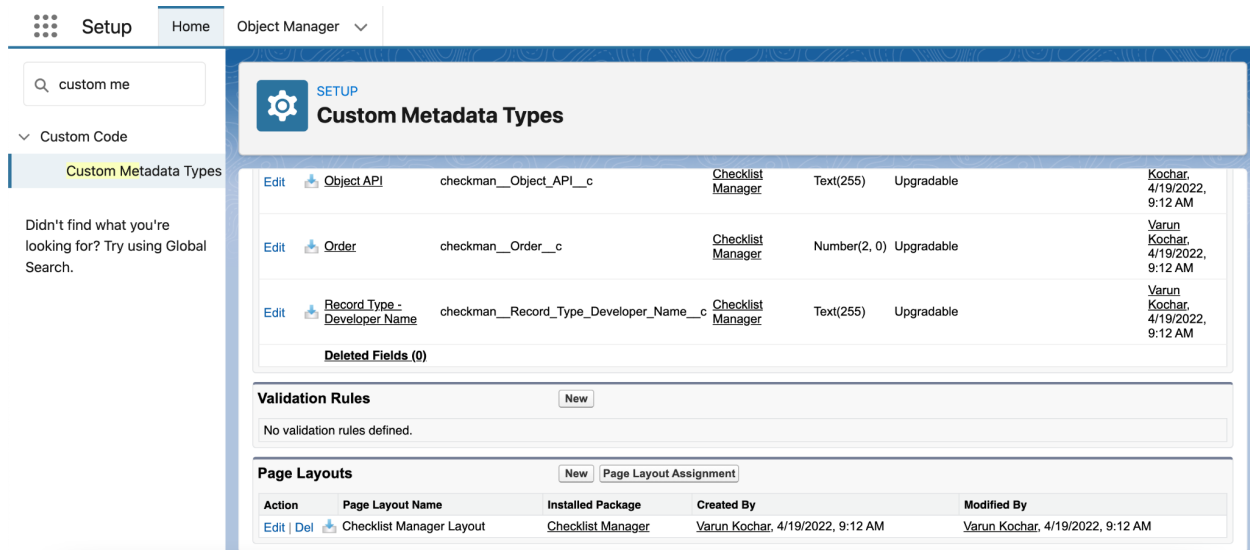


The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "custom me" and a "Custom Code" section with "Custom Metadata Types" selected. The main content area is titled "Custom Metadata Types" and shows details for the "Checklist Manager (Managed)" type. A yellow banner states: "This custom metadata type is managed. You can only edit certain attributes. [Display More Information](#)". Below this, there are tabs for "Standard Fields [6]", "Custom Fields [4]", "Validation Rules [0]", and "Page Layouts [1]". The "Custom Metadata Type Detail" section includes fields for Singular Label, Plural Label, Object Name, Namespace Prefix, API Name, Created By, and Modified By. The "Package Information" section shows the installed package as "Checklist Manager" and available versions as "1.2 - Current".

Custom Metadata Type Detail	
Singular Label	Checklist Manager
Plural Label	Checklist Manager
Object Name	Checklist_Manager
Namespace Prefix	checkman
API Name	checkman__Checklist_Manager__mdt
Created By	Varun Kochar, 4/19/2022, 9:12 AM
Modified By	Varun Kochar, 4/19/2022, 9:12 AM

Package Information	
Installed Package	Checklist Manager
Available in Versions	1.2 - Current

2. Goto → Page Layouts section and click on “Edit” next to “Checklist Manager Layout”



The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "custom me" and a "Custom Code" section with "Custom Metadata Types" selected. The main content area is titled "Custom Metadata Types" and shows the "Page Layouts" section for the "Checklist Manager" type. A table lists the page layouts with columns for Action, Page Layout Name, Installed Package, Created By, and Modified By. The "Checklist Manager Layout" is listed with the installed package as "Checklist Manager" and created/modified by "Varun Kochar, 4/19/2022, 9:12 AM".

Action	Page Layout Name	Installed Package	Created By	Modified By
Edit Del	Checklist Manager Layout	Checklist Manager	Varun Kochar, 4/19/2022, 9:12 AM	Varun Kochar, 4/19/2022, 9:12 AM

3. Drag and drop all fields on the layout and save

Setup Home Object Manager

Q custom me

Custom Code

Custom Metadata Types

Didn't find what you're looking for? Try using Global Search.

Custom Metadata Types

Save Quick Save Cancel Undo Redo Layout Properties

Fields

Section	Field Name
Custom Metadata R	Object API
Label	Order
Blank Space	Label
Checklist Item	Last Modified By Protected Compone
Created By	Namespace Prefix Record Type - Dev...

Checklist Manager Sample

Highlights Panel

Customize the highlights panel for this page layout...

Information (Header visible on edit only)

Label	Sample Text	Protected Component	✓
Custom Metadata Record Name	Sample Text	Namespace Prefix	Sample Text
Object API	Sample Text		
Record Type - Developer Name	Sample Text		
Checklist Item	Sample Text		
Order	94		

System Information (Header visible on edit only)

Created By	Sample Text	Last Modified By	Sample Text
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