Matrix Chart detailed configuration:

The Matrix chart type is designed for viewing salesforce records on a Matrix, allowing to manipulate of values by dragging child records between related Sobject field values of the child field and editing multi records using the popup feature.

Usage example: Assign leads to the owner (using Sales profile Id) in multi-records UX

Parent sObject records Parent Left-Side Fields (Config line 40)

Child sObject records title (Config line 56)

Unique Values retrieved from Matrix sObject field (Config line 10)

	User 1	User 2	User 3	User 4
Lead 1	Lead 1 CreatedDate LeadSource			
Lead 2		Lead 2 CreatedDate LeadSource		
Lead 3		Lead 3 CreatedDate LeadSource		

In the Matrix UI, you can define the relationship between the parent and the child and between the child and the Matrix

Timeline record You can filter the Matrix timeline using the config lines 11-13.

The assignment of the child record to the Matrix column is defined in Config lines 53-54

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

Configuration Color Code by Chart Type: (4.41)

All Chart Type	Scheduler	Scheduler/Gantt
Gantt	Grid	Matrix

Native Planner Plus Configuration:

#	Field Name	Values	Description	Example

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.	Matrix Matrix - Kanban
2.	Component Planner Height	Integer (Min 250)	Component height in pixels on the page	500
3.	Component Load More Scale	Integer (5 is min)	Number of Parent records to load at once (Use to Improve load times in case of big objects	15
4.	Component Show Color Legends	Picklist: YES / NO	Define the component to display legends. If Yes, Child Color Field (47) must be filled.	No
5.	Component Title	Text	The title is to be shown at the top left of the component.	Matrix Lead 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.	LEAD_LIST
8.	Component Icon Size	Picklist: SMALL, MEDIUM, LARGE	Icon size can be customized to: Small / Medium / Large	MEDIUM

9.	Component Matrix Timeline Sobject	Text	Define the sObject used to build the timeline	User You can use # to add empty value For example, User# will add an extra column on the left side to unassigned records.
10.	Component Matrix Timeline field	Text	Additional field to display on the timeline in Matrix	Company
11.	Component Matrix Initial Filter	Picklist: No, PageID, UserID, User fields	Allow using PageID to filter by Record Page or Logged-in user Id Or any $user field compared to Matrix records.	Filter them Matrix timeline by the signed-in user fields. For example: if we like to filter the Matrix to display only users from the same department as the signed-in user User fields and in config #12 use:
12.	Component Matrix Initial Filter Field	Text	You provide both Parent API Field and User API field names if using User fields. Company__c, Company	Department, Department
13.	Component Matrix Timeline Filter Statement	Text	filtering of the results received to build the timeline.	isActive = TRUE AND CompanyName = 'NativeERP'
14.	Component Timeline Zoom Scale	Integer (Min 10)	Control the default width of the tile(user can change later with + or -)	200
15.	Component Opt-Out Timeline	HOUR, DAY, WEEK, YEAR	Remove specific timeline scales from the component. (Ex-HOUR, will remove the option to pick the hour scale.)	NA
16.	Component Default Timeline	Picklist: DAY, HOUR, WEEK. MONTH, YEAR	Default timeline scale to display.	DAY /NA
17.	Component Smart Timeline	Picklist: STATIC, DYNAMIC, RANGE/STATIC, RANGE/DYNAMIC	Define the timeline, excluding days and components timeline coverage. STATIC – not including	STATIC /NA

18.	Component Date Format	EN, EN_GB, DE, SV, FR, ES, NL, PT, JA, HE, SK, CS	Change the dates format and language to the local language selected	EN
19.	Component Datetime Format	L, LL, LLL, LLLL, DD-MM-YY, any standard date format	The formatting affects the display of DateTime fields on the title, and the popup (default: LLL) supports all formats detailed here	LLL You can effect the week format by adding W or ww. Example: LLL, W
20.	Component Start Date	Date or TODAY	The date from which the component should start (Ex- TODAY -7, if you like to review from 7 days ago)	Today /NA
21.	Component End-In Days	Integer (min 1)	Days range to show on the component from the start date. (Ex – 10 days after Today)	10 /NA
22.	Component End-In Weeks	Integer (min 1)	Week scale range, the number of weeks to show from the start date.	7 /NA
23.	Component End-In Months	Integer (min 1)	Month scale range, the number of months to show from the start date (12 will show the entire year after the start date)	12/ NA
24.	Component End-In Years	Integer (min 1)	Year scale range, the number of years to show from the start date	12 /NA
25.	Component Start Time	Picklist	The Starting hour/time in the Hour scale (opening hours)	08:00 AM /NA
26.	Component End Time	Picklist	The End hour/time in the Hour scale (Ex. closing hours)	07:00 PM /NA

27.	Component Time Scale	Picklist: 15, 30, 60	15, 30, and 60 minutes timeframe per grid. (use 60 for an hour time slot)	60 /NA
28.	Component N Days in Hour Scale	Integer (min 1)	The number of days showing under the Hour time scale.	3 /NA
29.	Component Opt-Out Days	Text	Days excluded from the UI (ex. To remove Saturday and Sunday from the timeline) Use the day name in the selected language (#15)	/NA
30.	Component Hide Path Arrows	Picklist: Yes, No	Show the arrow at the end of the path between the child.	No /NA
31.	Component Margin Scale	Integer (0-10)	Define the Child tile padding between each other	3
32.	Component Bar Height	Picklist (1-8) or Auto	Control the # of bar height. The # is the number of lines that can fit in the title	3 In Auto, the height will be justified to fit the content.
33.	Component Popup Configuration	Text	Use any combination to show on the top bar of the popup box: DELETE - current record, CLONE cloning current record, HOVER to enable Hovering to show title fields, and FLOW to show icon on top of the pop-up box	CLONE, HOVER, DELETE, FLOW
34.	Component Flow Screen API	Text	Flow API name to activate when clicking on blank space on the UX Flow Screen variables PlannerId = { ParentId } and PlannerTarget = { Timeline Empty Blocks value }	

35.	Component Flow Screen Top API	Text	Screen Flow API name to display on top of the component and control component configuration	See the AppExchange document for a full list of variables
36.	Parent sObject	Text	Parent sObject source of records	Lead
37.	Parent Must-Have Childs	Picklist: Yes, No	Filter out Parents without Child records	No
38.	Parent Initial Filter	Picklist: No, PageID, UserID, User fields	Allow using PageID to filter by Record Page or Logged-in user Id Or any $user field compared to parent records	If the User field is selected need to provide the parent field and $user field in line 39.
39.	Parent Initial Filter Field	Text	Field to be used as an initial filter for the parent sObject with the Page Record Id or Logged-in User (Line–35) Ex. OwnerId in case of filter Event by UserId	OwnerId Or if using User fields, you need to provide both Parent API Field and User API field name. Company__c, Company
40.	Parent Left-Side Fields	Text	Field names are to be used as a label on the first column on the left.	Name
41.	Parent Search Fields	Text	Fields are to be used only as a quick filter and the advanced filter but not to be displayed.	
42.	Parent Group-By Field	Text	This field creates the Group By separation of parents.	
43.	Parent Filter Statement	Text	Define a filter statement to be used with the specified parent sObject (Ex. ID, RecordType, etc.)	
44.	Parent Sort Field	Text	Field to sort Parent records.	CreateDate

45.	Parent Sort Direction	Picklist: ASC, DESC	Using the Parent field (35) to sort the Parent records	ASC
46.	Child sObject	Text	Child sObject source of records	Lead
47.	Child Initial Filter	Picklist: No, PageID, UserID	Allow using PageID to filter by Record Page or Logged-in user Id	No
48.	Child Initial Filter Field	Text	field to be used as the initial filter for the Child sObject with the Page Record Id or Logged-in User (Line-31)	
49.	Child Custom Relationship	Picklist: YES / NO	Use a child sObject to use a custom relationship with the parent sObject.	YES
50.	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 with the child.	Id
51.	Child Grid Timeline Field	Test	The field from Child sObject to create the timeline in Grid mode. All unique values from child records	
52.	Child Grid Timeline Filter	Test	Define a filter statement to be used with in the Grid timeline (Ex – Completed – will exclude the Value completed from the timeline)	
53.	Child Custom Matrix Relationship	Picklist: YES / NO	Use a Matrix sObject to use a custom relationship with the parent sObject in the Matrix Chart type.	YES

54.	Child Custom Matrix Relationship Field	Text	Use a Matrix sObject to use a custom relationship with the parent sObject.	OwnerId
55.	Child Link Field	Text	A field to be used as a link/path reference between records in the Gantt chart. (Ex. - predecessor task)	
56.	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) support RTF	Name, Company, LeadSource
57.	Child Popup Fields	Text	Fields names to be used in the Popup box when clicking on child record can be edited if read-only set to no (comma separated) You can use Field-set in the lookup field to provide an additional field in the record search or other values from the lookup field like Company Name instead of Name.	Name, Company, Status, LeadSource, Description, Email, Rating Usage of lookup field set: LookupField@FieldsetName OR LookupField@FieldsetName#FieldName LookupField is a lookup field to X object in the child/extra object. FieldsetName is the fieldset API name on the X object.FieldName is not required, only if you like to search/display by other fields than Name. For example, Parent_Project__c@Test_Fieldset#Company By default, if the # is not provided, the display field is Name.
58.	Child Summary Fields	Text	The summary field is displayed on the timeline. Summary values per column (number, currency)	
59.	Child Start Field	Text	Field to be used as the start date of the specified child sObject (Date or DateTime field can be used)	

60.	Child End Field	Text	Field to be used as the end date of the specified child sObject (Date or DateTime field can be used)	End_Date__c
61.	Child Filter Statement	Text	Define a filter statement to be used with the specified child sObject	Status__c = 'Approved'
62.	Child Sort Field	Text	Field to sort Child records by when using Scheduler chat Type. (currently not applied in Gantt)	Name
63.	Child Sort Direction	Picklist: ASC, DESC	Child field (52) to sort the child records	ASC
64.	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)	Completion__c
65.	Child Color Field	Text	Used as the reference field value to relate to the Child Color Matrix configuration	Status__c
66.	Child Color Matrix	Text	Define an array of keys and values 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': 'Draft', 'value': '#74737a'}, {'key': 'Planning', 'value': '#ff828b'}, {'key': 'Active', 'value': '#7CA7B2'}, {'key': 'Completed', 'value': '#3E8461'}]
67.	Child Flow API	Text	Flow API name to start when clicking on the FLOW icon on the child popup. Flow Popup variable PlannerTarget = {	

			ChildId }	
68.	Extra Child sObject By	Picklist: No, PARENT, CHILD	Relate the Extra Sobject to the Parent or Child Records	NO
69.	Extra Child sObject	Text	Extra Child sObject source of records	
70.	Extra Child Initial Filter	Picklist: No, PageID, UserID	Allow using PageID to filter by Record Page or Logged-in user Id	
71.	Extra Child Initial Filter Field	Text	field to be used as an initial filter for the Child sObject with the Page Record Id or Logged-in User (Line - 51)	
72.	Extra Child Custom Relationship	Picklist: YES / NO	Use an Extra child sObject to use a custom relationship with the parent or child sObject.	NO
73.	Extra Child Custom Relationship Field	Text	Lookup field to be used as a relationship in situations where the specified parent or child has no direct relationship to the extra child.	
74.	Extra Child Grid Timeline Field	Text	The field from Extra Child sObject matches the timeline in Grid mode. Need to be the same unique values from the child Grid field values	
75.	Extra Child Custom Matrix Relationship	Picklist: YES / NO	Use an Extra child sObject to use a custom relationship with the parent or child sObject in Matrix Chart Type.	NO

76.	Extra Child Custom Matrix Relationship Field	Text	Use a Matrix sObject to use a custom relationship with the Extra Child sObject.	
77.	Extra Child Link Field	Text	A field to be used as a link/path reference between Extra Child records in the Gantt chart. (Ex. - predecessor task)	
78.	Extra Child Title Fields	Text	Fields names to be used as a label displayed on the Extra Child records (Separated by a comma, limit to 3 fields)	
79.	Extra Child Popup Fields	Text	Same as Config line 54	
80.	Extra Child Summary Fields	Text	The summary field is displayed on the timeline. Summary values per column (number, currency)	
81.	Extra Child Start Field	Text	Field to be used as the start date of the specified Extra Child sObject (Date or DateTime field can be used)	
82.	Extra Child End Field	Text	Field to be used as the end date of the specified Extra Child sObject (Date or DateTime field can be used)	
83.	Extra Child Filter Statement	Text	Define a filter statement to be used with the specified Extra child sObject	

84.	Extra Child Sort Field	Text	Field to sort Extra Child records by when using Scheduler chat Type. (currently not applied in Gantt)	
85.	Extra Child Sort Direction	Picklist: ASC, DESC	Using the Extra Child field (72) to sort the child records	ASC
86.	Extra Child Progress Field	Text	Field to be used to set the progress of the Extra child record. (Limit to 0.0 – 1.0) This will display a gradient color to represent progress)	
87.	Extra Child Color Field	Text	Used as the reference field value to relate to the Extra Child Color Matrix configuration	
88.	Extra Child Color Matrix	Text	Define an array of keys and values for the Extra Child Color Field. Formatting must be: [{'key': '1st Child Color Field Value', 'value': 'red'}, {'key': '2nd child color field value', 'value': '#404040'}]	
89.	Extra Child Flow API	Text	Flow API name to start when clicking on the FLOW icon on the child popup.	
90.	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
91.	Child Can Overlap	Picklist: YES / NO	Allow child record to overlap with another child record (require Scheduler Component Type) Ex – the ability	NO

			to place 2 assets in same grid allocation.	
92.	Child Read Only	Picklist: YES, NO, REVIEW, CONFIRM	Yes - not be able to drag or edit the record. NO—User can edit records instantly Review—User can drag and resize, but record not saved. Confirm—User can modify data, but receive save conformation before save.	NO