

Generic Timeline Demo Component

Post Installation Guide

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Generic Timeline Demo Component – Introduction

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This document describes post installation steps to follow in order to use the “Generic Timeline” demo component.

The “Generic Timeline” demo component offers a way to display on a parent record page, a “visual timeline” of related child records. It requires:

1. A “Parent Object” with at least 4 custom fields:
 - ✓ “Start Date”: date field
 - ✓ “End Date”: date field
 - ✓ “Child Records Count (#)”: roll-up summary field that counts the number of child records related to a parent record
 - ✓ “Child Records Last Modified Date”: roll-up summary field that stores the last modified date of child records related to a parent record



Generic Timeline Demo Component – Introduction

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2. A “Child Object” with at least 2 custom fields:

- ✓ “Estimated Start Date”: date field
- ✓ “Real Start Date”: date field

Optional custom fields are:

- ✓ “Estimated End Date”: date field
- ✓ “Real End Date”: date field
- ✓ “Field to Display on the timeline”: if you want to display something else than the standard “Name” field

3. Process Builder that generates “Refresh Timeline Events” (*use of Platform Events*) when child records are added, modified or removed.

Please note that this component is based on the “visjs timeline” javascript library:

<http://visjs.org/docs/timeline>



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Here is an example of how this “Generic Timeline” demo component looks like:

The screenshot displays the 'Generic Timeline Demo Component' interface. It features a timeline view at the top showing milestones from September to November 2017. Below the timeline is a table of milestones, and to the right is an activity panel. Annotations highlight specific fields and objects:

- Parent Object “Start Date”**: Points to the start of the timeline in September 2017.
- Child Object “Field to Display”**: Points to the 'Résultats Labo' milestone.
- Parent Object “End Date”**: Points to the end of the timeline in November 2017.
- Child Object “Estimated Start Date”**: Points to the 'ESTIMATED DATE' column in the milestones table.
- Child Object “Real Start Date”**: Points to the 'REAL DATE' column in the milestones table.

ETUDE MILE...	MILESTONE NA...	ESTIMATED DATE	REAL DATE
EM00117	Création Etude	27/09/2017	
EM00118	KOM	04/10/2017	05/10/2017
EM00123	Début techniq...	09/10/2017	
EM00124	QR Client	17/10/2017	
EM00125	Résultats Labo	24/10/2017	

Activity Panel:

- Buttons: Log a Call, Email, New Task, More
- Form: Recap your call... [Add]
- Activity Timeline: [Filter] [Refresh] [Expand All]
- Next Steps: [More Steps]
- Message: No next steps. To get things moving, add a task or set up a

Generic Timeline Demo Component – Post Installation Step 1

Add and configure the “Generic Timeline” demo component on your “Parent Record” page

The screenshot displays the Salesforce Lightning App Builder interface for the "Etude Record Page". The main area shows a preview of the "Generic Timeline Demo Component" with a timeline view. The timeline includes milestones such as "Création Etude", "RDM", "Début technique de l'étude", "QR Client", "Résultats Labo", and "Envoi Rapport technique provisoire validé".

On the left, the "Lightning Components" panel lists various components, including "Generic Time Line Component" under the "Custom (15)" section. A blue callout box labeled "1. Drag & Drop the component" points to this component.

On the right, the configuration panel for the "Generic Time Line Component" is shown. It includes fields for:

- Parent Object Name: Etude__c
- Parent Object - Start Date Field: Start_Date__c
- Parent Object - End Date Field: End_Date__c
- Child Object Name: Etude_Milestone__c
- Child Object - Field to display on the timeline: Milestone_Name_Picklist__c
- Child Object - Lookup Field with Parent Object: Etude__c
- Child Object - Estimated Start Date Field

A blue callout box labeled "2. Configure the component" points to this configuration panel.

The bottom of the interface shows a "Get more on the AppExchange" button. The Salesforce logo is visible in the bottom right corner.

Generic Timeline Demo Component – Post Installation Step 2

Add “Child Records Count (#)” and “Child Records Last Modified Date” roll-up custom fields on your “Parent Object”

Etude Custom Field

Child Records #

Back to Etude

Help for this Page ?

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Field Information

Field Label	Child Records #	Object Name	Etude
Field Name	Child_Records_Count		
API Name	Child_Records_Count__c		
Description			
Help Text			
Created By	Cyril Verhaest, 06/10/2017 16:33	Modified By	Cyril Verhaest, 06/10/2017 16:33

Roll-Up Summary Options

Data Type	Roll-Up Summary	Summary Type	COUNT
Summarized Object	Etude Milestone		
Filter Criteria			

Etude Custom Field

Child Records Last Modified Date

Back to Etude

Help for this Page ?

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Field Information

Field Label	Child Records Last Modified Date	Object Name	Etude
Field Name	Child_Records_Last_Modified_Date		
API Name	Child_Records_Last_Modified_Date__c		
Description			
Help Text			
Created By	Cyril Verhaest, 06/10/2017 16:34	Modified By	Cyril Verhaest, 06/10/2017 16:34

Roll-Up Summary Options

Data Type	Roll-Up Summary	Summary Type	MAX
Summarized Object	Etude Milestone		
Field to Aggregate	Etude Milestone: Last Modified Date		
Filter Criteria			



Generic Timeline Demo Component – Post Installation Step 3

(1/3) - Choose Object and Specify When to Start the Process

Configure a “Process Builder” on your “Parent Object” that generates “Refresh Timeline Events” (use of Platform Events) when child records are added, modified or removed.

The screenshot displays the Salesforce Process Builder configuration interface for a process named "genericTimeline_LCMP - Refresh Timeline". The interface is divided into two main sections: a flowchart on the left and a configuration panel on the right.

Flowchart (Left):

- The process starts with a "START" node.
- It proceeds to a process step named "Etude".
- Following "Etude", there is a decision diamond labeled "Child Record ...".
- If the condition is "TRUE", the flow goes to an "IMMEDIATE ACTIONS" box containing "Create Refresh Tim...", which then leads to a "STOP" node.
- If the condition is "FALSE", the flow goes to another decision diamond labeled "+ Add Criteria".
- If this second condition is "TRUE", it leads to another "IMMEDIATE ACTIONS" box (containing "+ Add Action") and then to a "STOP" node.
- If the condition is "FALSE", the flow continues downwards.

Configuration Panel (Right):

The panel is titled "Choose Object and Specify When to Start the Process".

- Object ***: A dropdown menu showing "Etude". A blue callout box labeled "Your parent object" points to this field.
- Start the process ***: Two radio button options are present:
 - ☐ only when a record is created
 - ☒ when a record is created or editedA blue callout box labeled "When a record is created or edited" points to the selected option.
- Advanced**: A section with a dropdown arrow.
- Recursion - Allow process to evaluate**: A checkbox labeled "Yes" is currently unchecked.
- single transaction?**: A link with an information icon.

At the bottom of the configuration panel are "Save" and "Cancel" buttons.

Generic Timeline Demo Component – Post Installation Step 3

(2/3) - Define Criteria for this Action Group

Process Builder - genericTimeline_LCMP - Refresh Timeline

Expand All Collapse All View All Processes Clone View Properties Deactivate Read Only

START

Etude

Child Record ...

TRUE → IMMEDIATE ACTIONS

Create Refresh Tim...

+ Add Action

FALSE → + Add Criteria

TRUE → IMMEDIATE ACTIONS

+ Add Action

FALSE

Define Criteria for this Action Group

Criteria for Executing Actions *

- ☒ Conditions are met
- ☐ Formula evaluates to true
- ☐ No criteria—just execute the actions!

Set Conditions

	Field *	Operator *	Type *	Value *
1	[Etude__c].Chil...Q	Is changed	Boolean	True
2	[Etude__c].Chil...Q	Is changed	Boolean	True

Conditions *

- ☐ All of the conditions are met (AND)
- ☒ Any of the conditions are met (OR)
- ☐ Customize the logic

"Child Records Count" is changed = true
OR
"Child Records Last Modified Date" is changed = true

Generic Timeline Demo Component – Post Installation Step 3

(3/3) - Create a “Refresh Timeline Event” record

The screenshot displays the Salesforce Process Builder interface for a process named 'genericTimeline_LCMP - Refresh Timeline'. The process flow starts with a 'START' node, followed by an 'Etude' object. A decision diamond labeled 'Child Record ...' has two paths: 'TRUE' leads to an 'IMMEDIATE ACTIONS' box containing 'Create Refresh Tim...', which then leads to a 'STOP' node. The 'FALSE' path leads to another decision diamond labeled '+ Add Criteria', which has a 'TRUE' path leading to another 'IMMEDIATE ACTIONS' box with '+ Add Action', and a 'FALSE' path leading to a 'STOP' node.

The right-hand pane shows the configuration for the 'Create a Record' action. The 'Action Name' is 'Create Refresh Timeline Event'. The 'Record Type' is 'Refresh Timeline Event'. The 'Set Field Values' section shows a table with the following fields:

Field *	Type *	Value *
RecordId	Field Reference▼	[Etude__c].Id

A blue callout box points to the 'Record Type' field with the text: "Refresh Timeline Event" record with "RecordId" = Your Parent Object record Id.

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