User & Installation Guide for Custom Kanban

1. Overview

Salesforce Kanban view provides users with a visual summary of complex data that is easy to understand.

However, one major drawback of the Default Salesforce Kanban is the inability to hold up to 200 records simultaneously. Another shortcoming is the restriction to save only one Kanban view at a time.

Our experts at Tech9logy Creators understood this drawback and developed the ultimate solution—Custom Kanban. It's a native Salesforce app that breaks the stereotypes by effectively overcoming the drawbacks of the default Salesforce Kanban view. It effectively upgrades admin performance with its helpful features, which let you take action fast as work progresses in your business process.

2. Key Features

2.1 Create Unlimited Kanban

With Custom Kanban, you can seamlessly create unlimited Kanbans for the same object, that too with diverse configurations.

2.2 View Unlimited Records

Custom Kanban empowers you to view 10x records, unlike the default Salesforce Kanban view with a 200-record view limit.

2.3 Customizable Kanban Cards

Custom Kanban lets you effortlessly customise Kanban cards as per your business preferences.

2.4 Switch Kanban

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Custom Kanban lets you easily switch between multiple Kanbans, eliminating the need for manual configurations.

2.5 Filter Kanban Records

Segregate records as per your business needs with the filter option, facilitating better analysis and decision-making.

2.6 Available for All Objects

Custom Kanban is dynamic for all objects in Salesforce, including accounts, contacts, opportunities, leads, or other custom objects.

2.7 Drag & Drop Kanban Cards With Ease

Its intuitive drag-and-drop feature lets you move records freely as opportunities flow in your business process.

3. Installation

Let's see how you can install Custom Kanban and overcome the restrictions set by the Default Kanban View in Salesforce.

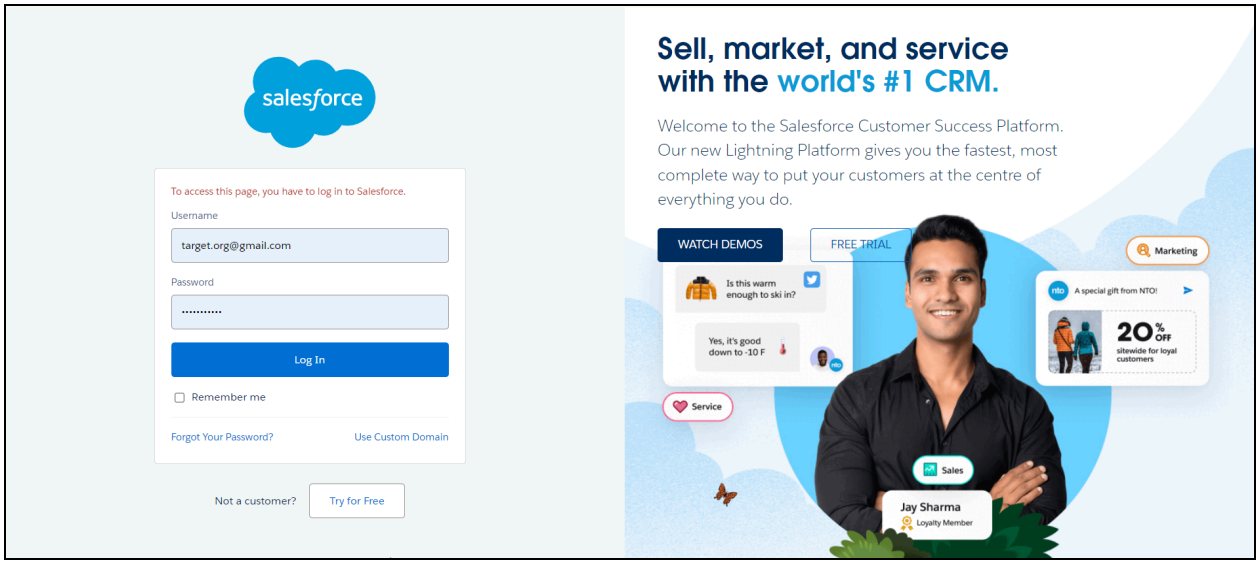
Let's get started!

- Once you purchase the product, you must open the email you provided when filling out the form. This email will contain the link to the package and your license key.

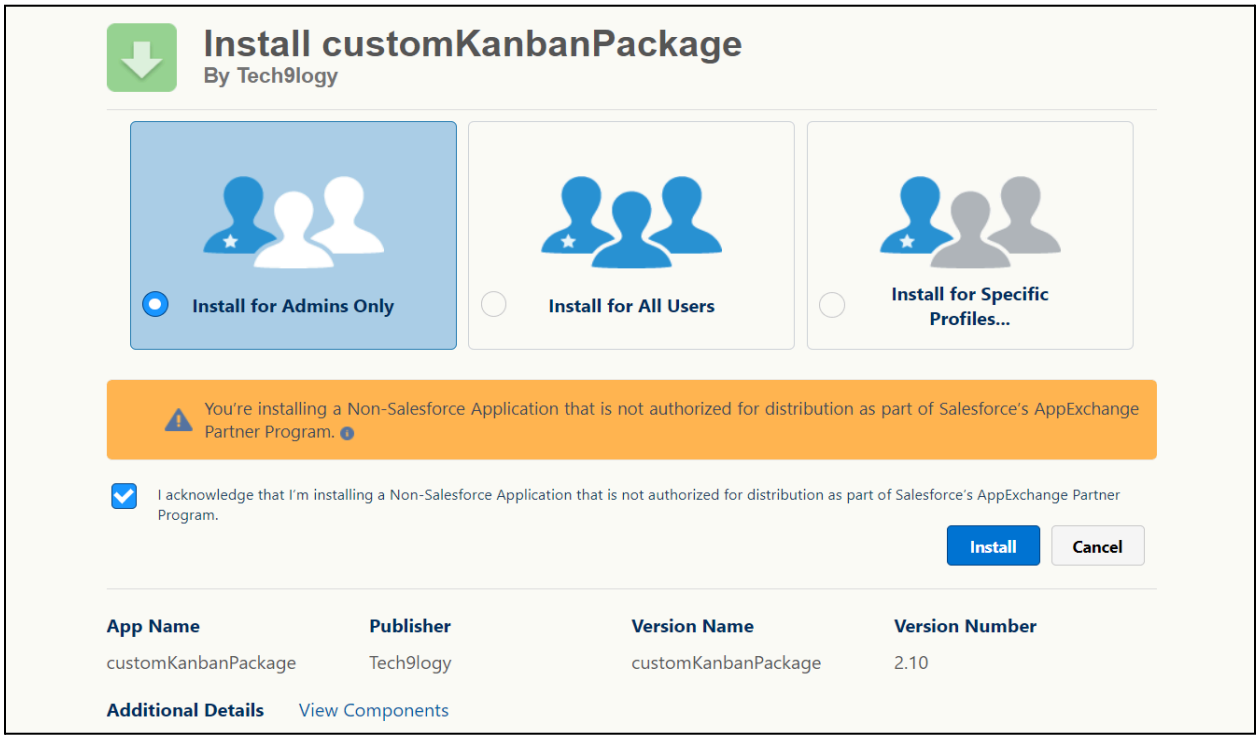
- Now, enter your Salesforce login credentials (Username and Password) and log in to your account.

Enter your Salesforce username and Password in the dedicated sections and log in to your account.

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Choose the ‘Install for Admins Only’ option and acknowledge the third-party app installation. Then, click on Install.



Now that you’re done with the installation, let’s move forward to the configuration part.

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4. Key Terminology

4.1 Select Kanban

Choose a previously created Kanban

4.2 Create new

Create a new Kanban view

4.3 Share Kanban

Share Kanban with another user

4.4 Switch Kanban

Change Kanban view

4.5 Edit Kanban

Effortlessly edit the existing Kanban

4.6 New

Create a new record of the object

4.7 Show Kanban Description

Choose whether to display the Kanban description or not

4.8 Kanban Header Color

Modify Kanban header color

4.9 License Key

A license key is a unique code or identifier to activate and validate MigSO features or services.

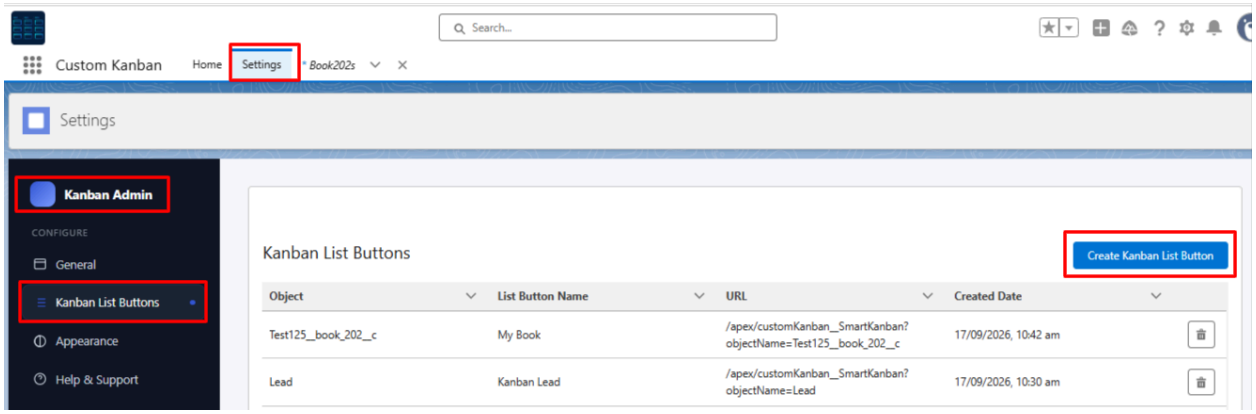
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5. User Documentation

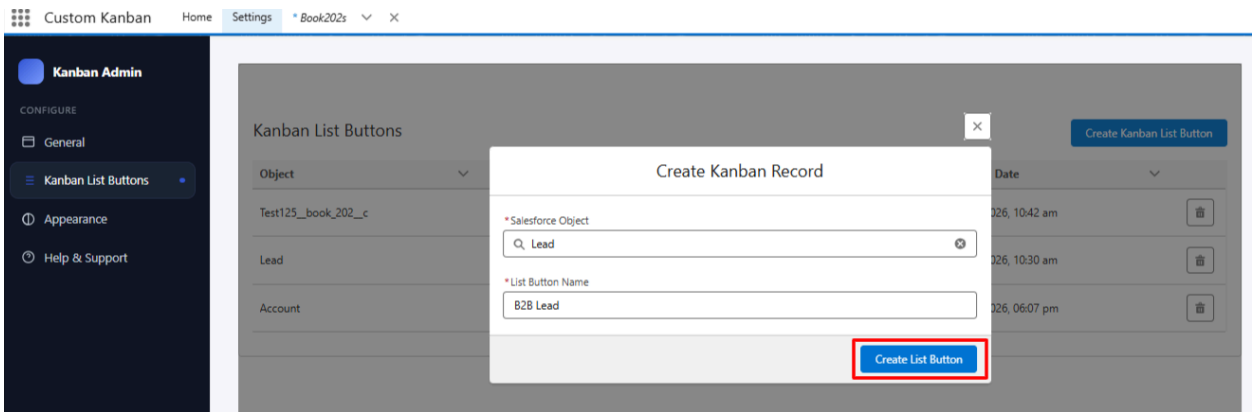
5.1 Configuration and Settings

After installing Custom Kanban into your Salesforce org, go to the app launcher, search for the required field (Lead in our case), and click on it.

From the App Launcher, search for Custom Kanban and click the Settings tab. Here, you can see in the image below, select the list and click on the Create New button.

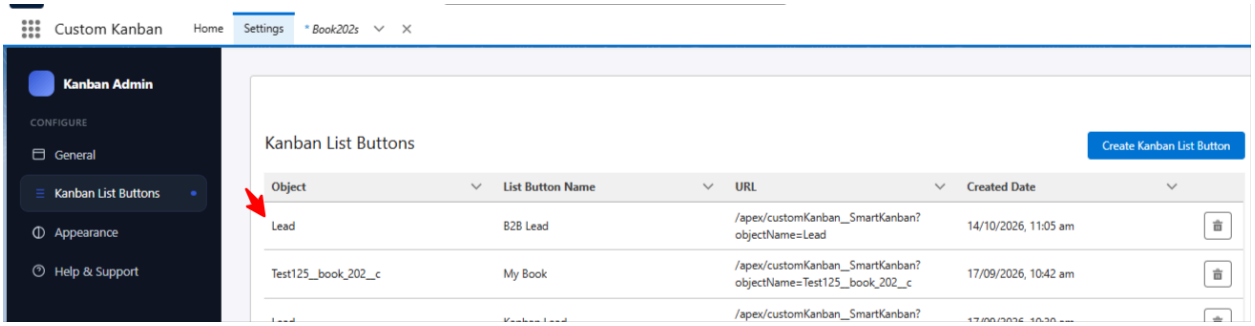


Click on the Create Kanban List button.

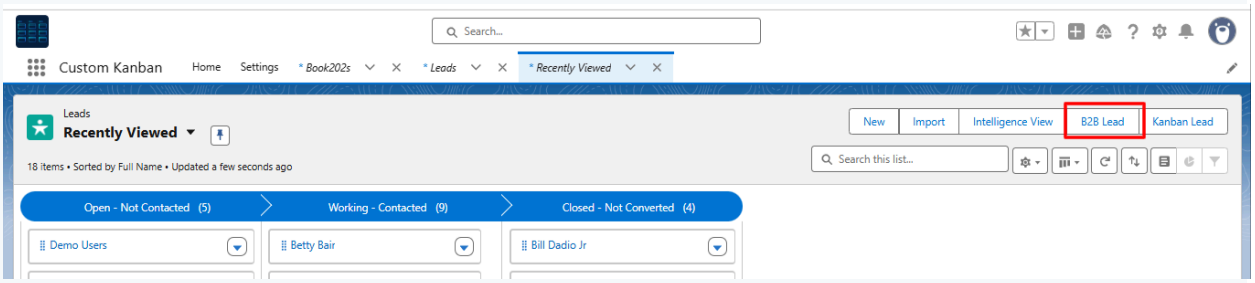


Select the object on which you want to add the Kanban button and enter the name of the Kanban button. Now, click on the Create List button.

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You can see the recently created Kanban list view button on the Lead Object. You can also delete the Kanban button by clicking the delete icon, so it will be removed from that object as well.

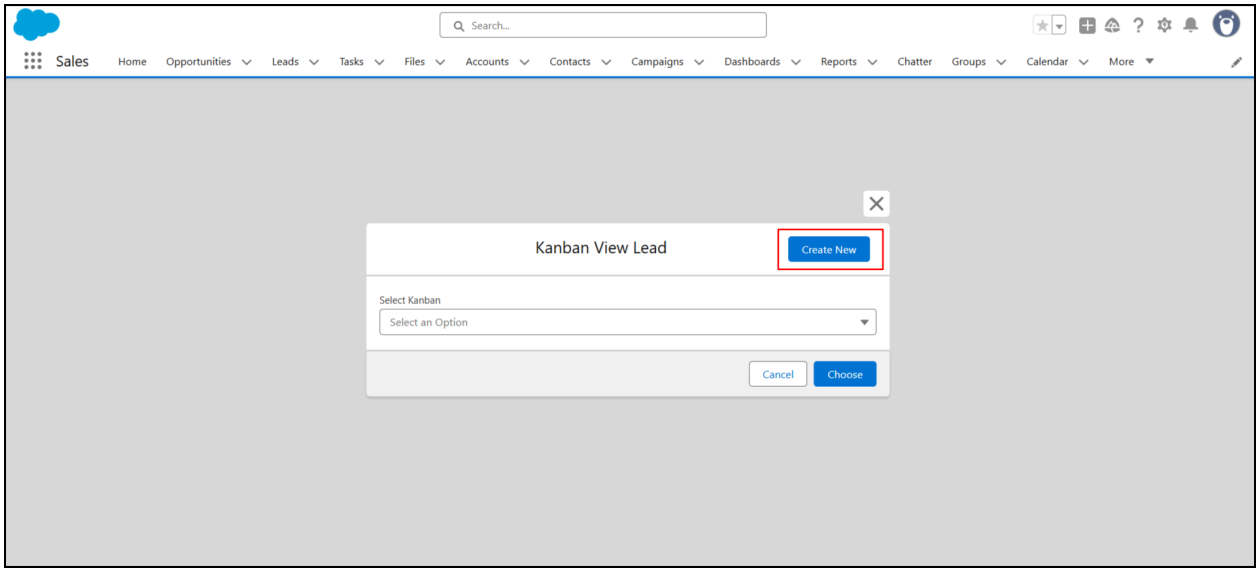


Search the Lead Object in the App Launcher, and you can see the Kanban Lead button that we created earlier in the custom Kanban settings.

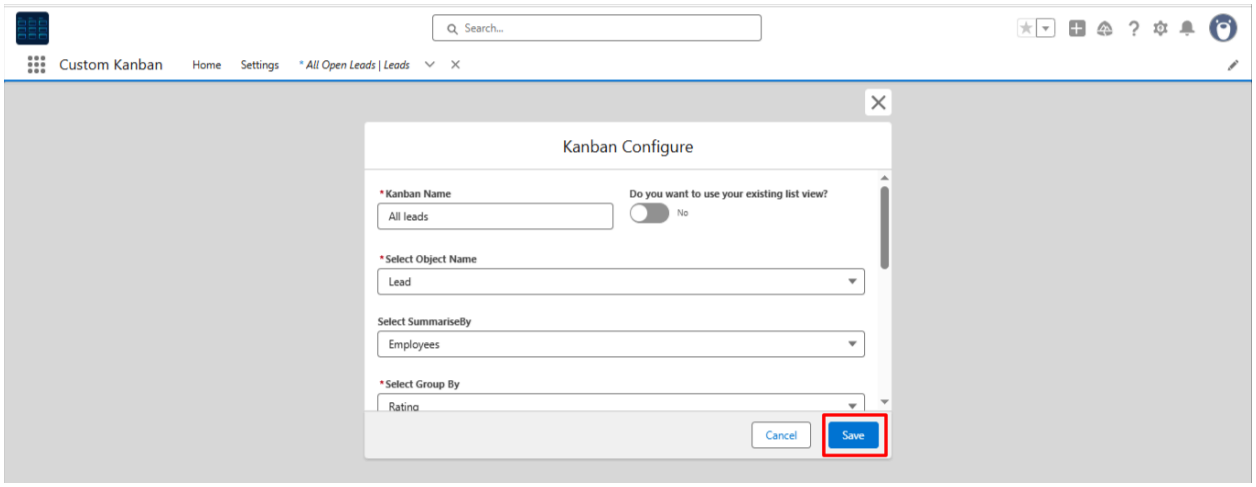
A dialog box opens with two options: "Create New View" and "Select Kanban View." Choose the appropriate option according to your preference.

You can select this option if you have already created a Kanban Configured View. Since it's the first Custom Kanban configuration, click "Create New."

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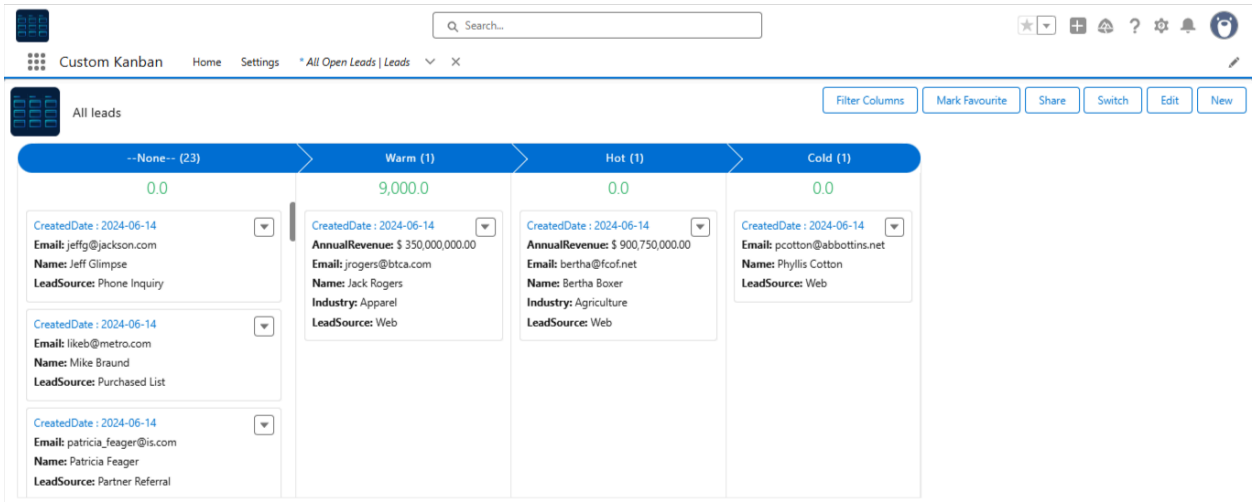


Now, fill in the mandatory fields for the Kanban configuration. You can add a Filter and choose Kanban for the list view. After this, click on "Save."



After clicking "Save," you will see the Kanban view based on your saved Kanban configuration.

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On the Kanban view, there are options to Filter Columns, Mark Favourite, Share Kanban, Switch Kanban, Edit Kanban, and New. Choose the option that best suits your needs.

Click on “Filter Columns.” We can filter Group By field values in the filter columns.

Click on “Mark Favourite.” We can mark it as a favourite. If you want to show the default Kanban record.

Click on “Share Kanban.” We can share it with a different Kanban configuration view with multiple users.

Click on “Switch Kanban.” We can switch to a different Kanban configuration view by using Change Kanban View.

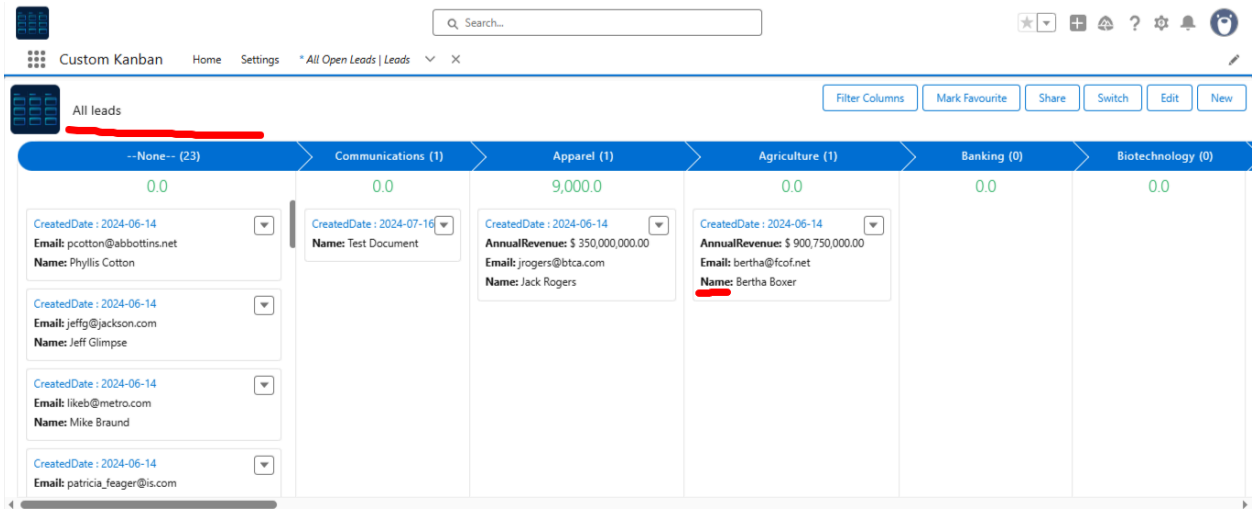
Click on "Edit Kanban." By using Edit Kanban, we can modify the Kanban view.

Click on “New”. With Create Lead, we can generate a new lead.

After selecting Kanban View, click on "Choose." You will find the Kanban configured data according to your Kanban Configuration.

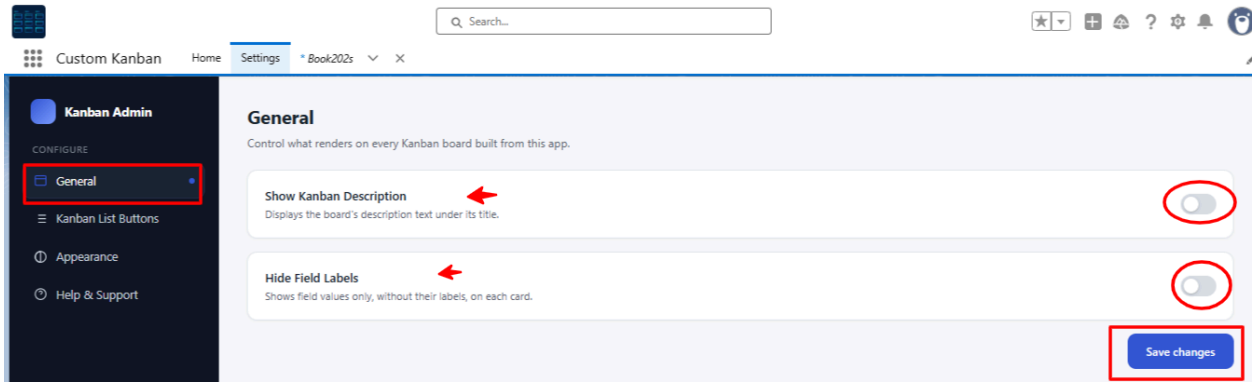
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Finally, the record will be displayed based on your selection.

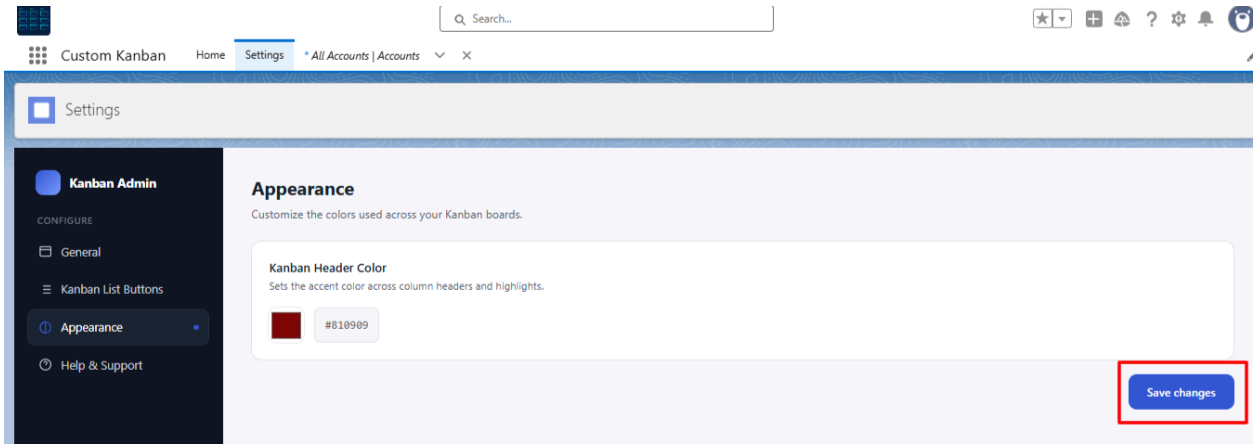


You can see in the above image that the Summarise By and Group By fields are not showing on the Kanban view page for All leads, which you selected while creating the Kanban record.

Next, in the above image, if you want to hide the field label and want to see field values, or want to change the colour, you can do so here.



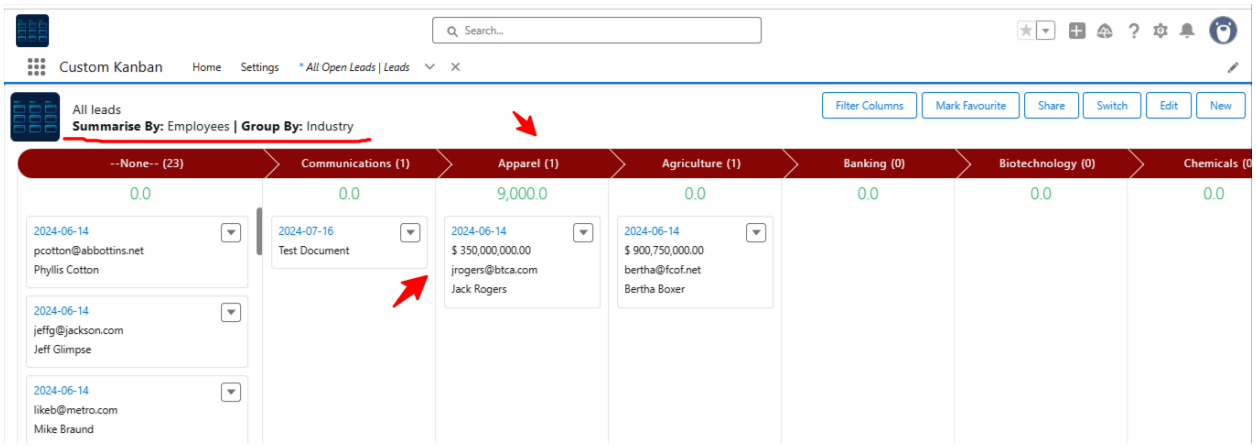
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If you turn on Show Kanban Description and click the Save Changes button to save it. It will show the Summarise by and Group by fields on the Kanban page.

If you turn on Hide Field Labels and click the Save Changes button to save it, it will hide the field labels on the Kanban page.

If you want to change the color. You can do it from the settings by clicking on Appearance and changing the color, then clicking on the Save Changes button to save it.



Here, you can see that the Summarise By and Group By fields are visible now on the Kanban page.

Color has been changed from blue to red as well.

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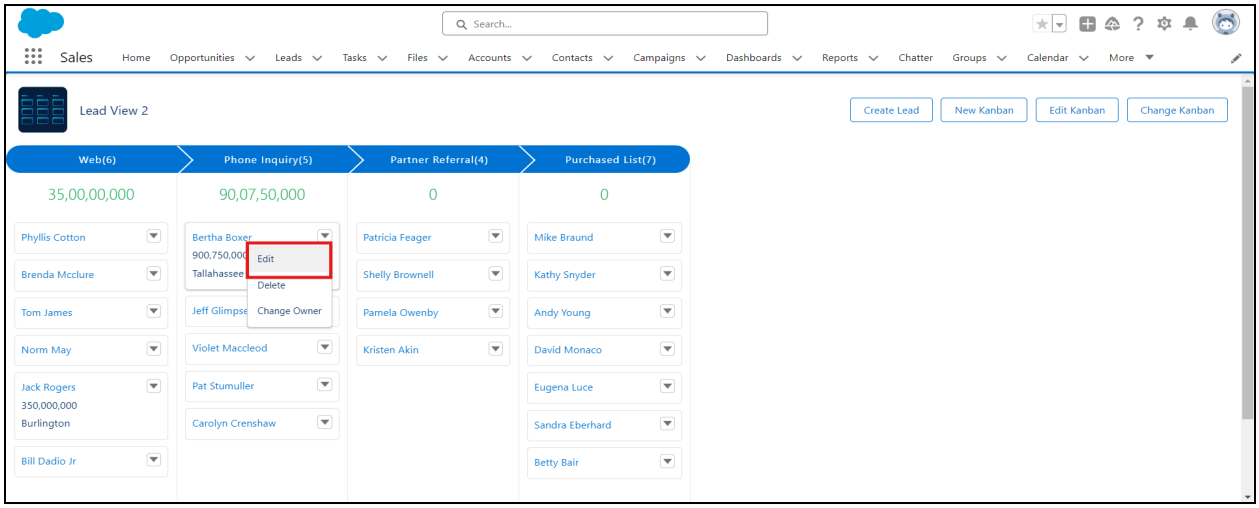
Field Label has been hidden now.

5.2 Modification of Records

Let’s now move to modifying records as per your preferences in the Custom Kanban view.

First, select any Kanban card and click on the downward arrow icon next to it.

Click on **Edit** from the given options. This will open another tab displaying the entered information on the specific card.

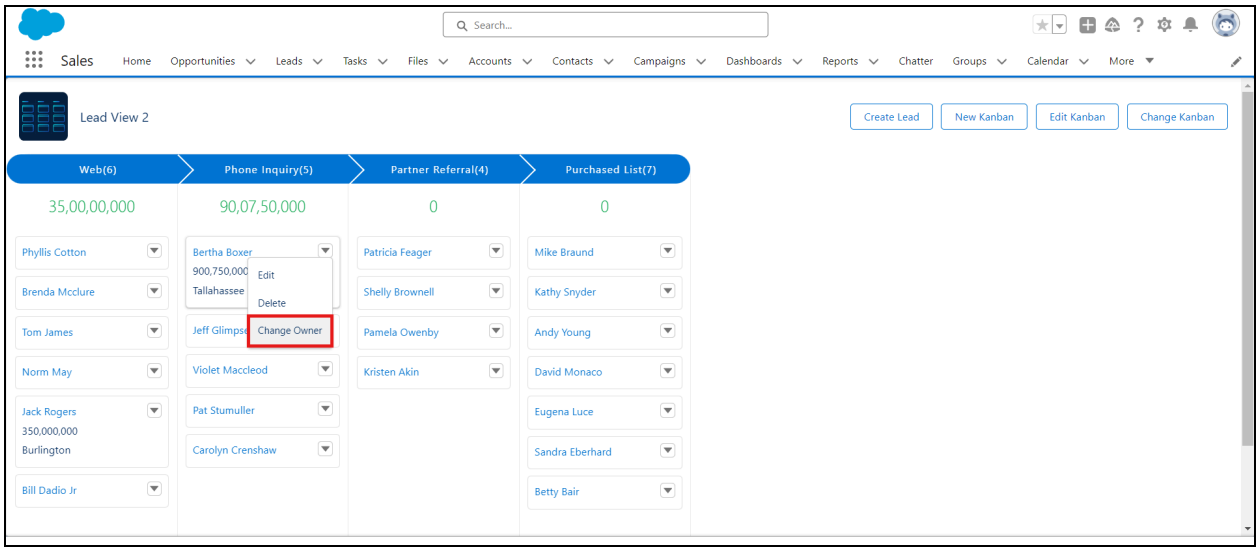


You can make the required changes to the card and then click on the Save button.

5.3 Changing the Record Owner

You can also change the record owner by picking a card and clicking the Change Record Owner option. Select the required owner for your record in the dialog box and click on Change Owner.

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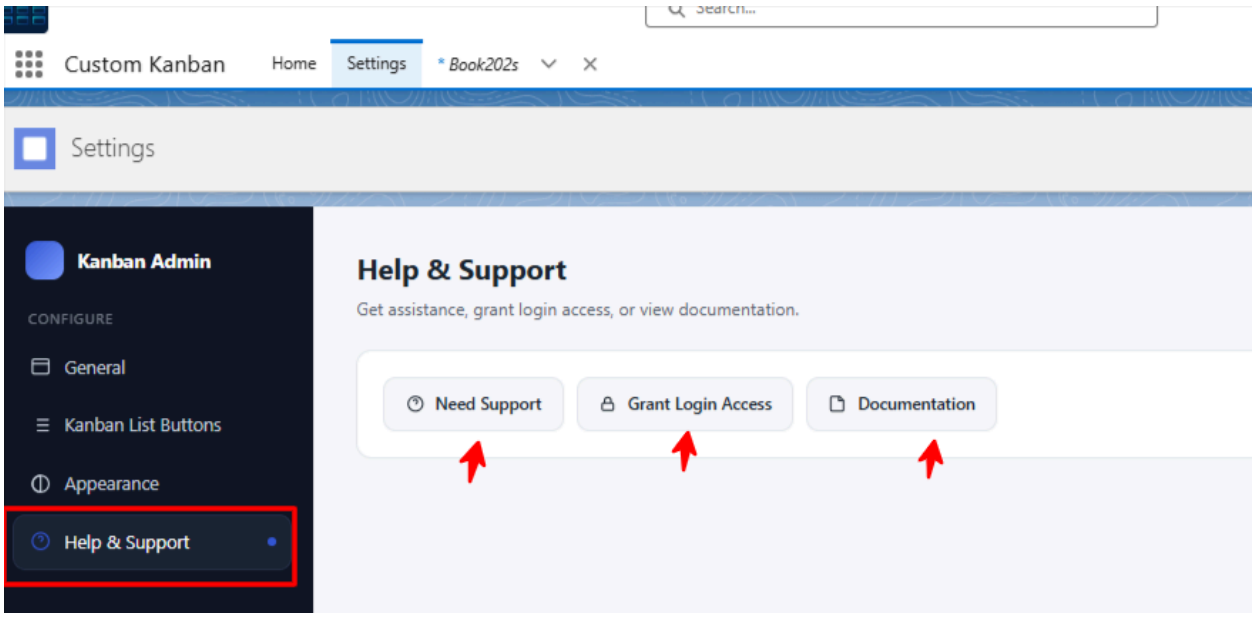


5.5 Move Things Around

Moreover, our application's intuitive drag-and-drop functionality allows you to move the Kanban cards as your business cycle progresses.

This is how you can break the stereotypes and get autonomy from the drawbacks of the default Kanban view in Salesforce.

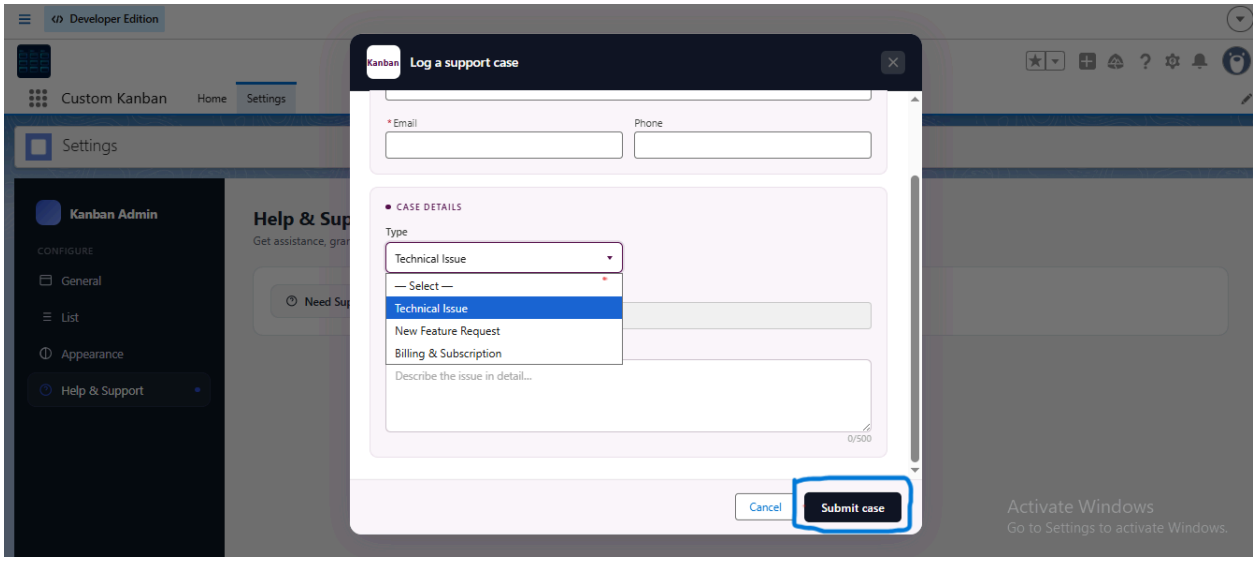
6. Live Assistance



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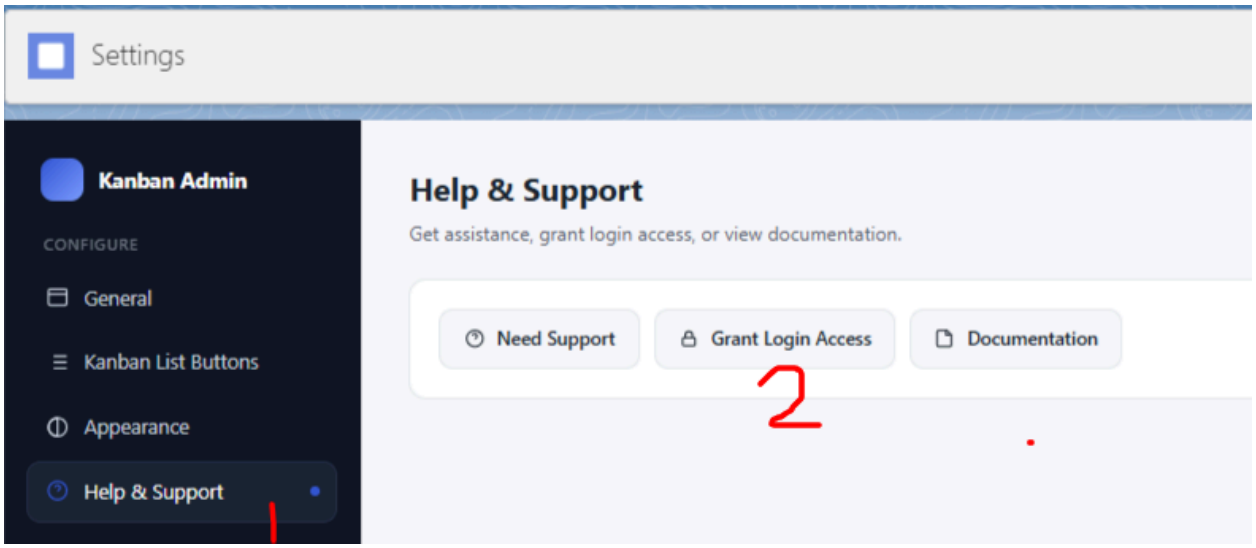
If you face any issues or wish to customise this Salesforce app as per your business preferences, feel free to contact us anytime. We will be more than happy to help you.

6.1 Need Support

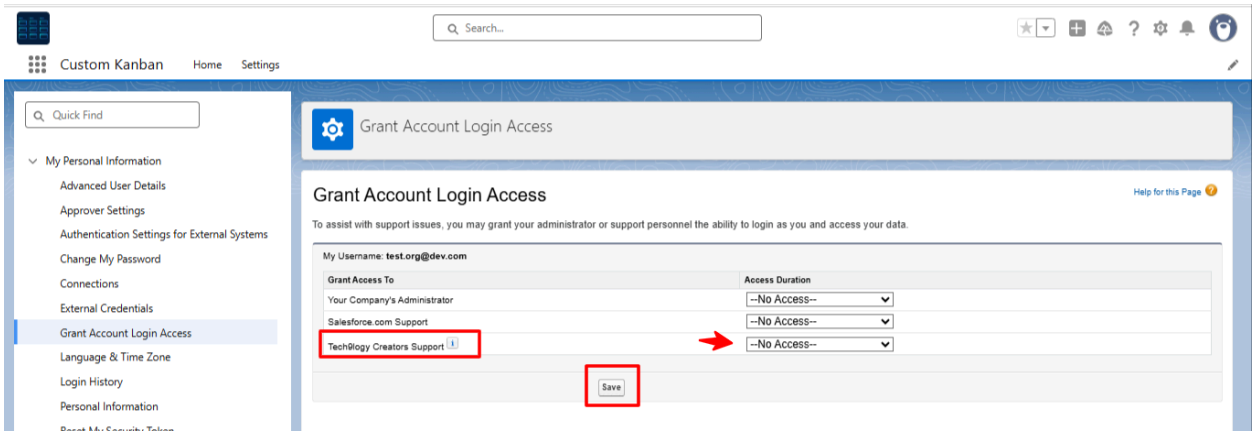


You can raise a case for the following case detail types from the image above. Click on the Submit Case Button.

6.2 Grant Login Access



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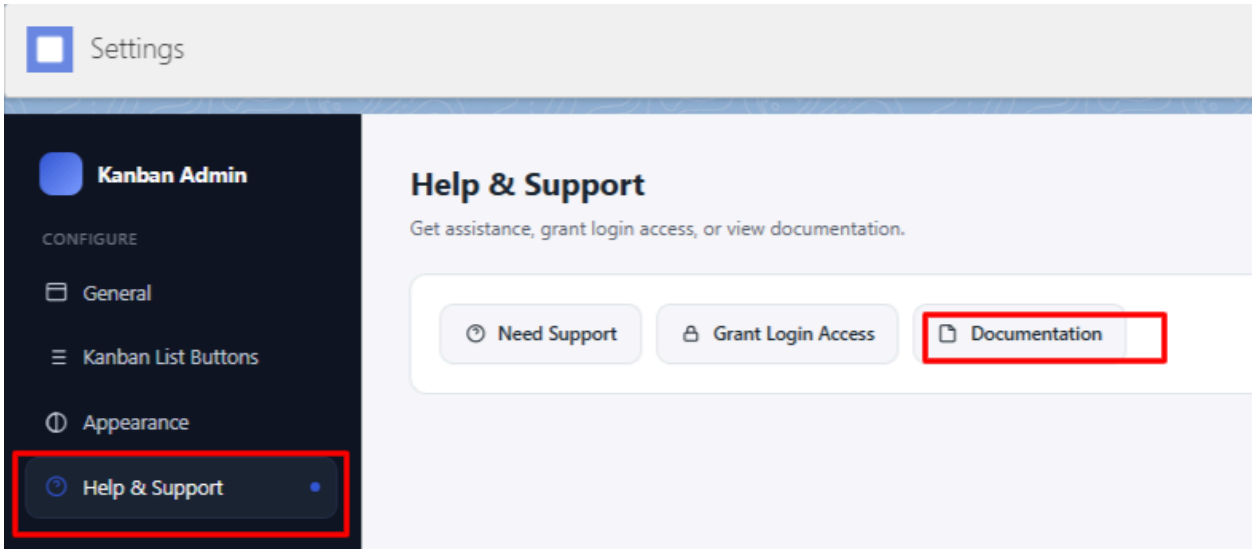


In the Custom Kanban Settings tab, select Help & Support and click on the Grant Login Access Button.

Here, you can give your org with an access duration to the Tech9logy Creators.

Click on the Save button.

6.3 Documentation



In the Custom Kanban Settings tab, select Help & Support and click on the Documentation. It will redirect you to the custom Kanban user document.

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FAQs

Ques: What are the limitations of using the Kanban view?
Ans: The Salesforce Kanban list view only allows you to view up to 200 records by default. Closed Lost opportunities are not displayed in Kanban views.

Ques: Why do I need the Custom Kanban view?
Ans: Tech9logy Creators understood the issue and designed an ultimate solution– Custom Kanban. This remarkable Salesforce app lets you add and view unlimited records in the Kanban view and flexibly drag & drop cards as your opportunities flow. Moreover, this app also offers a table view for your reference.

Ques: Which industries prefer the Kanban view of Salesforce?
Ans: The Kanban view organizes every work process and its stages meaningfully. Although it was initially used only by the auto manufacturing sector, it is now widely used in the IT sector as well.

Ques: Does Custom Kanban offer any advanced features?
Ans: Yes, Custom Kanban comes with several advanced features, such as the ability to view records across multiple objects and filter records based on custom criteria. These features make it easier for you to manage your business processes and make informed decisions.

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