



FlexiKanban
Every user's command center



Breaking Barriers

Elevating Salesforce Kanban with Flexi Kanban's Customization Power



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What is Kanban?

Kanban was originally developed by **Taiichi Ohno** at **Toyota** as an inventory control system for just-in-time manufacturing. It uses visual cards to track production and reorder materials as needed. The word "Kanban" means "visual card" in Japanese, reflecting its focus on using visual cues to keep processes running smoothly.

A **Kanban Board** is a key tool in this process, with its visual columns and cards that represent tasks or records. It allows you **to organize records into different stages, categories, or segments**, making it easy to track both progress and the quality of data as it moves through validation steps.



Do you use Kanban Boards
to manager your work?



Introduction to Salesforce Kanban View

Salesforce implemented the Kanban View as part of its Lightning UI to provide users with a powerful and intuitive way to visualize data and gain insights into their workflows. It offers several key benefits that enhance productivity and streamline record management:

Visual Representation of Data

The Kanban View transforms traditional list views into a visual board, allowing users to quickly grasp the status and progress of their records. This visual representation is particularly useful for:

Opportunities: Sales teams can see their pipeline at a glance, with opportunities organized by stage.

Leads: Marketing and sales teams can visualize lead progression through various qualification stages.

Tasks: Project managers and team members can track task status.

Process Visualization

It is particularly useful for visualizing and managing processes. It allows teams to:

Identify bottlenecks in workflows

Balance workloads across team members

Quickly assess the overall status of records in various stages



Limitations of Salesforce Kanban View

While the Salesforce Standard Kanban View offers a simple and user-friendly way to organize and track progress, its limitations can restrict the flexibility and efficiency that many businesses require.

Below are the primary restrictions:

Limited Number of Cards: The Salesforce Kanban View is limited to showing first 200 records, restricting visibility for larger teams or extensive data sets.

Restricted Field Display: Salesforce Kanban View cards can maximum display only four fields, limiting visibility without opening each card.

Limited Customization Options: Salesforce's Kanban cards are quite rigid in their appearance. Users are unable to customize the content and layout of the cards to better reflect their specific needs or workflows.

Static Columns: Standard Kanban view columns are predefined and static, based solely on standard picklist fields. Users cannot modify columns to customize their logic to better reflect unique workflows, reducing flexibility in managing processes.

Basic Filtering Capabilities: Salesforce Kanban View has basic filters, limiting users from creating complex views to segment data effectively.



Flexi Kanban: An Ultimate Kanban Solution

Flexi Kanban is an innovative application designed for the Salesforce platform that transforms the user interface with customizable Kanban boards. This app allows users to visualize and manage data in a way that aligns with their specific workflow requirements.

Key features of Flexi Kanban include:

Break free from Kanban limits: Flexi Kanban allows users to overcome Salesforce's major restrictions, making it easy to customize, filter, and supercharge their workflow.

Tailor-made Kanban boards: Users can create boards that fit their unique project needs, enhancing efficiency and clarity in workflow management.

Customizable columns: The app offers unlimited, independently configurable columns to accommodate various process complexities.

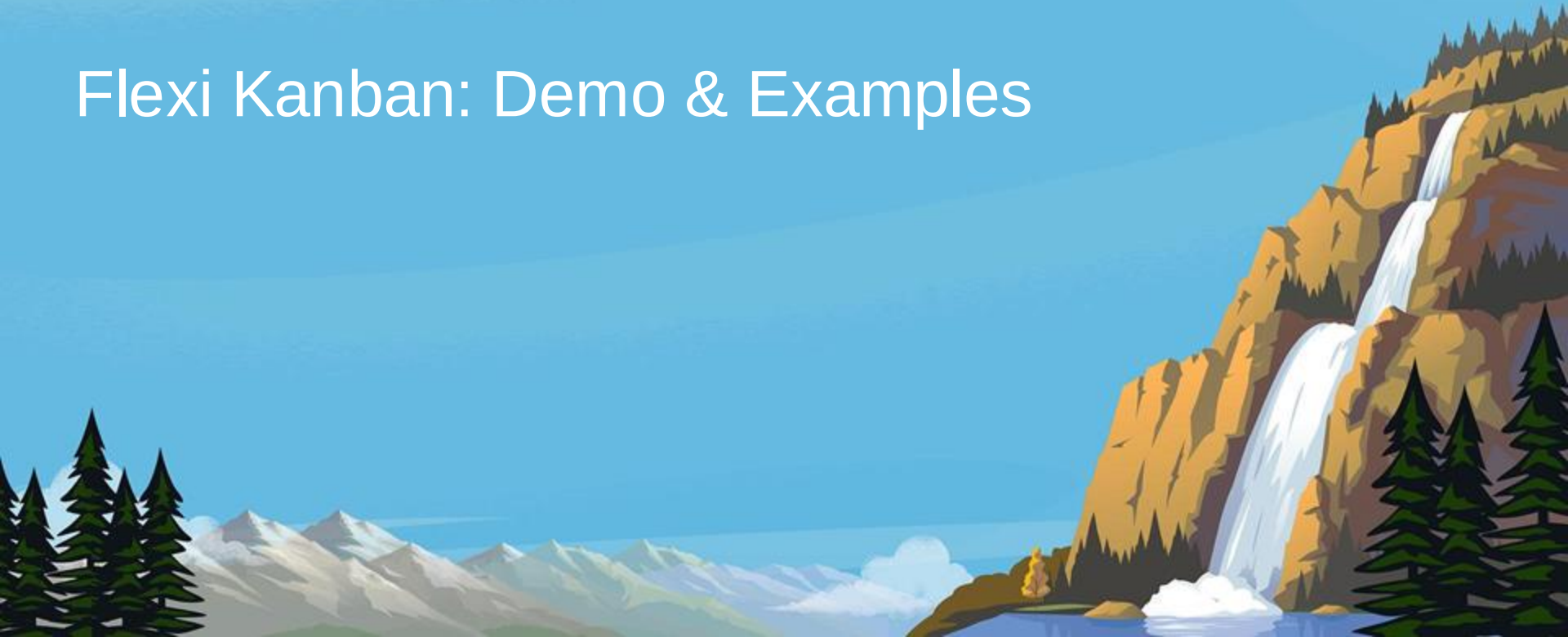
Adaptable cards: Each card represents a Salesforce object and can be designed to display the most relevant information for the team.

Dynamic data display: Advanced formulas and functions bring data to life, ensuring that the most pertinent information is accessible.

Interactive elements: Users can click on cards elements to reveal more detailed information and perform actions like moving cards or selecting menu options and showing dynamic forms.



Flexi Kanban: Demo & Examples



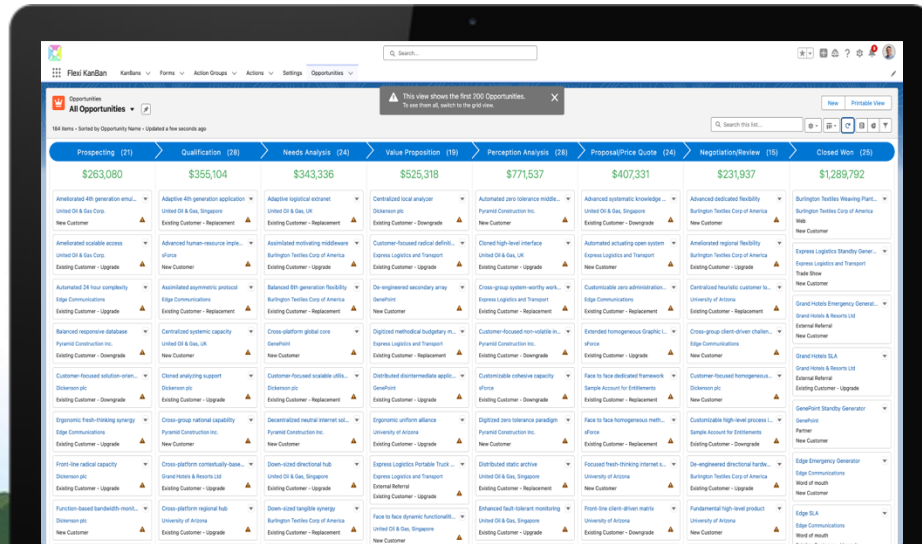
Any number of records, any number of card fields, color-coding, and much more.

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Flexi Kanban: Break Free From Salesforce Kanban Limits

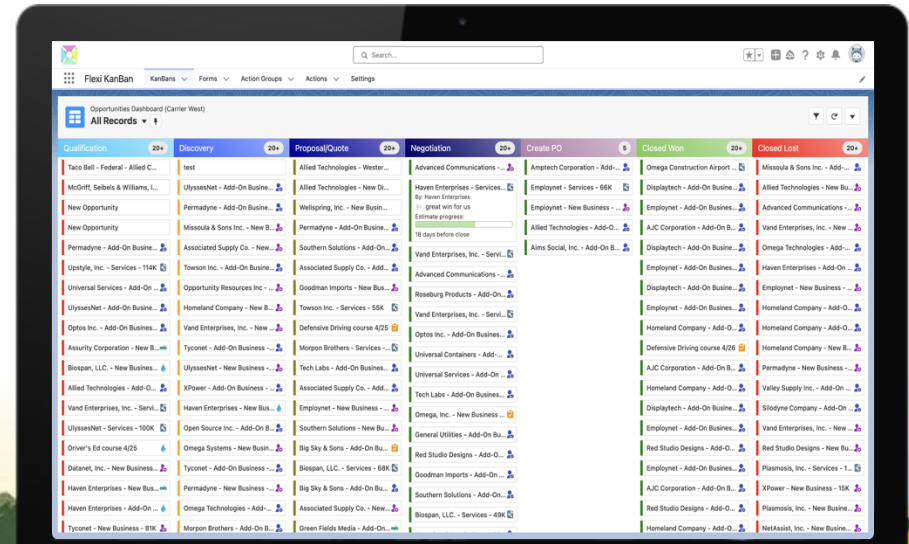
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Standard Kanban View



Prospecting (21)	Qualification (28)	Needs Analysis (24)	Value Proposition (19)	Perception Analysis (18)	Proposal/Price Quote (14)	Negotiation/Review (16)	Closed Won (15)
\$263,080	\$355,104	\$343,336	\$525,318	\$771,537	\$407,331	\$231,937	\$1,289,792
Ameliorated 4th generation email...	Adaptive 4th generation application...	Adaptive logistical network...	Centralized local analyzer...	Automated zero tolerance middle...	Advanced systematic knowledge...	Advanced dedicated facility...	Burlington Textiles Weaving Plant...
United D & S, Singapore	United D & S, UK	United D & S, UK	Disseminated...	United D & S, Singapore	United D & S, Singapore	United D & S, Singapore	Burlington Textiles Corp of America
Existing Customer - Upgrade	Existing Customer - Replacement	Existing Customer - Replacement	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	New Customer
Ameliorated available access...	Advanced human-resource impl...	Automated mediating middlewares...	Customer-focused radical definit...	Directed high-level interface...	Automated actuating open system...	Ameliorated regional facility...	Burlington Textiles Corp of America
United D & S, Singapore	United D & S, UK	Burlington Textiles Corp of America	Existing Customer - Upgrade	United D & S, UK	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade
Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade
Automated 24 hour complexity...	Automated segmental personal...	Relaxed 8th generation facility...	On-engineered secondary array...	Cross-group system monthly work...	Customizable zero administration...	Customizable zero administration...	Express Logistics and Transport
Edge Communications	Edge Communications	Burlington Textiles Corp of America	New Customer	Existing Customer - Replacement	Existing Customer - Replacement	Existing Customer - Replacement	Express Logistics and Transport
Existing Customer - Upgrade	Existing Customer - Replacement	Existing Customer - Replacement	Existing Customer - Replacement	Existing Customer - Replacement	Existing Customer - Replacement	Existing Customer - Replacement	Express Logistics and Transport
Relaxed responsive database...	Centralized systemic capacity...	Cross-platform global core...	Digitalized medicalized budgetary...	Customer-focused non-volatile in...	Extended homogeneous Graphic L...	Extended homogeneous Graphic L...	Grand Hotels Emergency Generat...
United D & S, UK	United D & S, UK	New Customer	Existing Customer - Replacement	Existing Customer - Replacement	Existing Customer - Replacement	Existing Customer - Replacement	Grand Hotels & Resorts Ltd
Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Grand Hotels & Resorts Ltd
Customer-focused solution orient...	Cloud oriented support...	Customer-focused scalable applic...	Distributed distributed multimedia...	Customizable cohesive capacity...	Face to face dedicated framework...	Customer-focused homogeneous...	Grand Hotels & Resorts Ltd
Disseminated...	Disseminated...	Disseminated...	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Replacement	Existing Customer - Replacement	Grand Hotels & Resorts Ltd
Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Replacement	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Replacement	Existing Customer - Replacement	Grand Hotels & Resorts Ltd
Organic fresh-thinking synergy...	Cross-group national capacity...	Decentralized neutral internet int...	Organic uniform alliance...	Digitalized zero tolerance paradigm...	Face to face homogeneous metho...	Customizable high-level process L...	Grand Hotels & Resorts Ltd
Edge Communications	United D & S, Singapore	United D & S, Singapore	New Customer	Existing Customer - Replacement	Existing Customer - Replacement	Existing Customer - Replacement	Grand Hotels & Resorts Ltd
Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Replacement	Existing Customer - Replacement	Grand Hotels & Resorts Ltd
Function-based bandwidth reconst...	Cross-platform regional hub...	Down-sized directional hub...	Express Logistics Portable Tool...	Distributed static archive...	Focused team-thinking internal...	On-engineered directional hardw...	Edge Emergency Generator
Disseminated...	United D & S, UK	United D & S, Singapore	Existing Customer - Upgrade	Existing Customer - Replacement	Existing Customer - Upgrade	Existing Customer - Upgrade	Edge Communications
Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Replacement	Existing Customer - Upgrade	Existing Customer - Replacement	Existing Customer - Upgrade	Existing Customer - Upgrade	Edge Communications
Function-based bandwidth reconst...	Cross-platform regional hub...	Down-sized tangible synergy...	Express Logistics and Transport	Disseminated static archive...	Focused team-thinking internal...	Fundamental high-level product...	Edge Communications
Disseminated...	United D & S, Singapore	Burlington Textiles Corp of America	Existing Customer - Upgrade	Existing Customer - Replacement	Existing Customer - Upgrade	Existing Customer - Upgrade	Edge Communications
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Flexi Kanban View

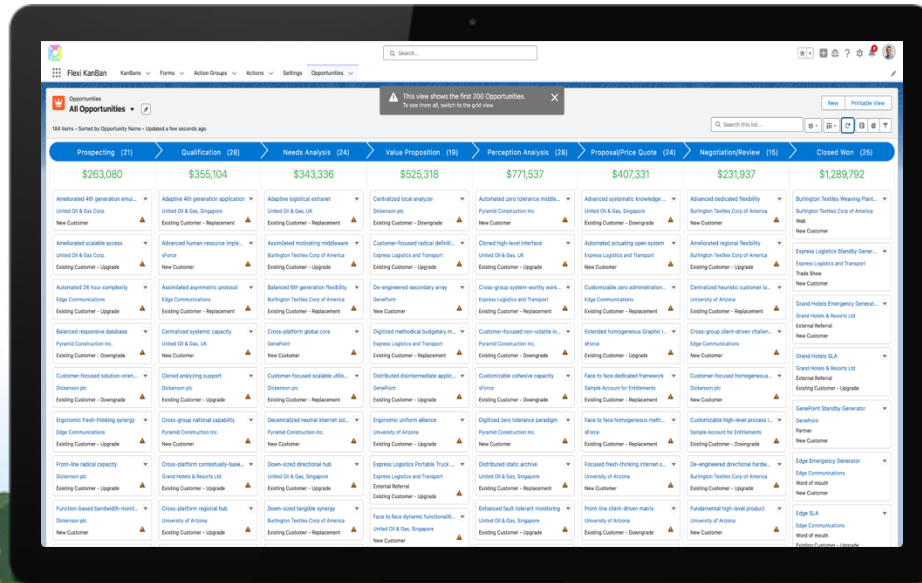


Qualification (20+)	Discovery (20+)	Proposal/Quote (20+)	Negotiation (20+)	Create PO (20+)	Closed Won (20+)	Closed Lost (20+)
Taco Bell - Federal - Allied C...	test	Allied Technologies - Wester...	Advanced Communications ...	Amptech Corporation - Add...	Omega Construction Airport ...	Misoula & Sons Inc. - Add...
McGriff, Seibels & Williams, L...	UlyssesNet - Add-On Busine...	Allied Technologies - New D...	Haven Enterprises - Services...	Employnet - Services - 66K	Displaytech - Add-On Busine...	Allied Technologies - New Bu...
New Opportunity	Permadyne - Add-On Busine...	Wellspring, Inc. - New Busi...	By Haven Enterprises	Employnet - New Business ...	Employnet - Add-On Busine...	Advanced Communications ...
New Opportunity	Missoula & Sons Inc. - New B...	Permadyne - Add-On Busine...	Southern Solutions - Add-On...	Allied Technologies - Add-O...	AJC Corporation - Add-On B...	Vand Enterprises, Inc. - New...
Permadyne - Add-On Busine...	Associated Supply Co. - New...	Associated Supply Co. - Add...	Goodman Imports - New Bus...	Advanced Communications ...	Employnet - Add-On Busine...	Omega Technologies - Add...
UlyssesNet - Add-On Busine...	Townson, Inc. - Add-On Busi...	Universal Services - Add-On...	Goodman Imports - New Bus...	Roseburg Products - Add-On...	Displaytech - Add-On Busine...	Haven Enterprises - Add-On...
Optics Inc. - Add-On Busine...	Vand Enterprises, Inc. - New...	UlyssesNet - Add-On Busine...	Defensive Driving course 425	Optics Inc. - Add-On Busine...	Employnet - Add-On Busine...	Homeland Company - New B...
Assurity Corporation - New B...	UlyssesNet - Add-On Busine...	Tech Labs - Add-On Busine...	Universal Containers - Add-On...	Universal Containers - Add-On...	Employnet - Add-On Busine...	Homeland Company - Add-O...
Allied Technologies - Add-O...	XPower - Add-On Business ...	Associated Supply Co. - Add...	Tech Labs - Add-On Busine...	Tech Labs - Add-On Busine...	Displaytech - Add-On Busine...	Slodyne Company - Add-On...
Vand Enterprises, Inc. - Serv...	Employnet - New Business ...	Omega, Inc. - New Business ...	Omega, Inc. - New Business ...	Omega, Inc. - New Business ...	Employnet - Add-On Busine...	Vand Enterprises, Inc. - New...
UlyssesNet - Services - 100K	Open Source Inc. - Add-On B...	Southern Solutions - New Bu...	General Utilities - Add-On B...	General Utilities - Add-On B...	Red Studio Designs - Add-O...	Red Studio Designs - New Bu...
Driver's Ed course 425	Omega Systems - New Busin...	Big Sky & Sons - Add-On Bu...	Red Studio Designs - Add-O...	Red Studio Designs - Add-O...	Employnet - Add-On Busine...	Plasmass, Inc. - Services - 1...
Datanet, Inc. - New Business...	Tyconet - Add-On Business ...	Big Sky & Sons - Add-On Bu...	Goodman Imports - Add-On...	Goodman Imports - Add-On...	AJC Corporation - Add-On B...	XPower - New Business - 15K
Haven Enterprises - New Busi...	Permadyne - New Business ...	Big Sky & Sons - Add-On Bu...	Southern Solutions - Add-On...	Southern Solutions - Add-On...	Red Studio Designs - Add-O...	Plasmass, Inc. - New Busine...
Haven Enterprises - Add-On...	Omega Technologies - Add...	Associated Supply Co. - New...	Big Sky & Sons - Add-On Bu...	Big Sky & Sons - Add-On Bu...	Red Studio Designs - Add-O...	NetAssist, Inc. - New Busi...
Tyconet - New Business - 87K	Morgan Brothers - Add-On B...	Green Fields Media - Add-On...	Green Fields Media - Add-On...	Green Fields Media - Add-On...	Homeland Company - Add-O...	

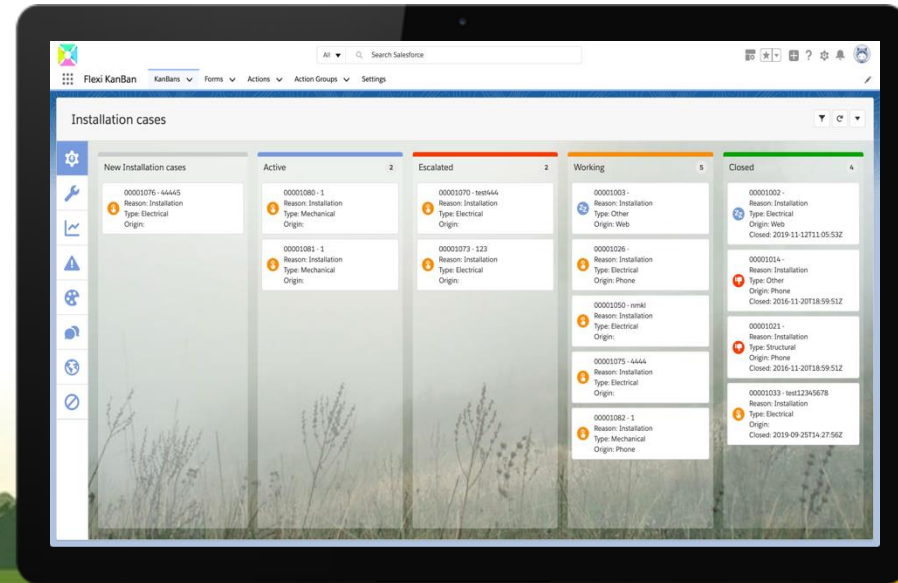
Flexi Kanban: Break Free From Salesforce Kanban Limits

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Standard Kanban View



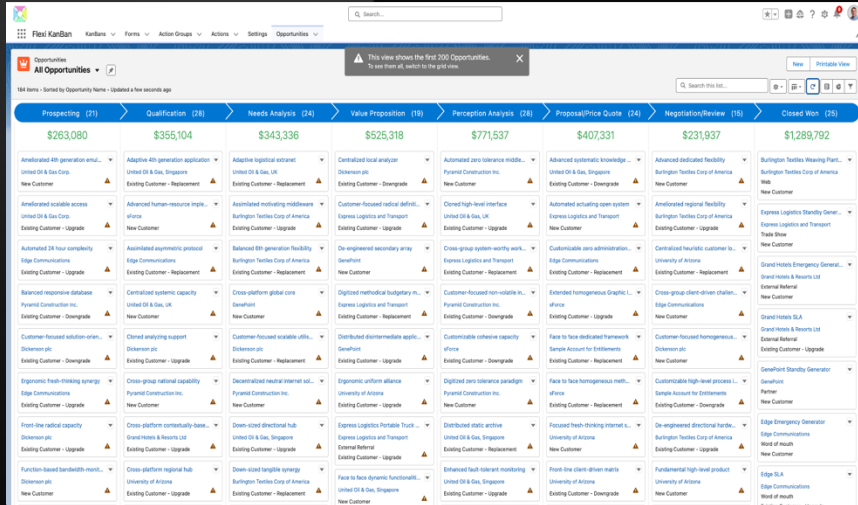
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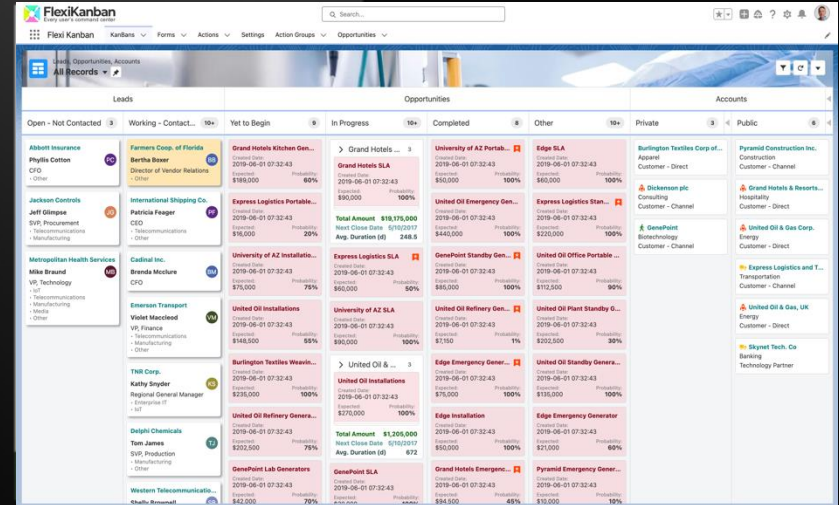
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Standard Kanban View



This screenshot shows the Standard Kanban View in FlexiKanban. It features a top navigation bar with tabs for Kanbans, Forms, Action Groups, Actions, Settings, and Opportunities. Below the navigation bar is a search bar and a notification banner stating "This view shows the first 200 Opportunities. To see them all, switch to the grid view." The main content area displays a Kanban board with eight columns representing different stages of the sales process: Prospecting (21), Qualification (28), Needs Analysis (24), Value Proposition (19), Perception Analysis (18), Proposal/Price Quote (14), Negotiation/Review (16), and Closed Won (15). Each column contains a list of cards representing individual opportunities, with details such as the opportunity name, customer, and various fields.

Flexi Kanban View

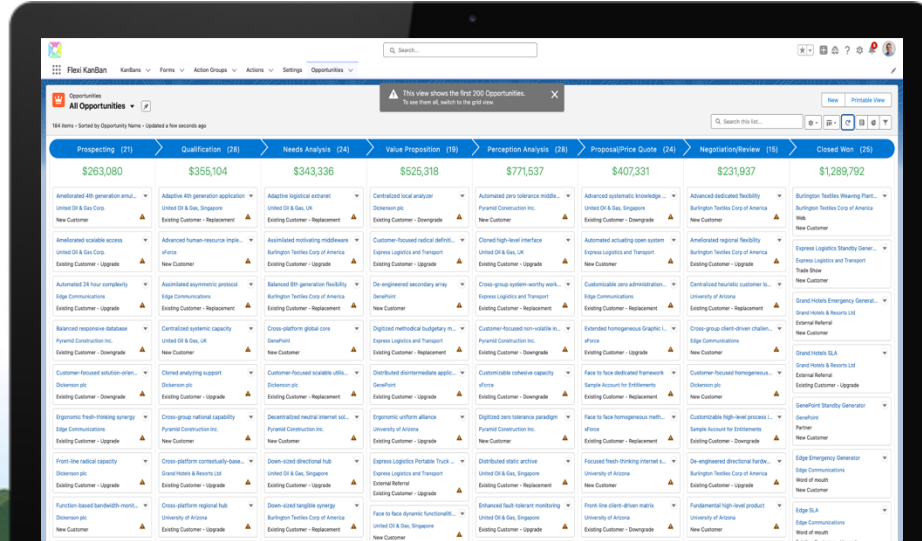


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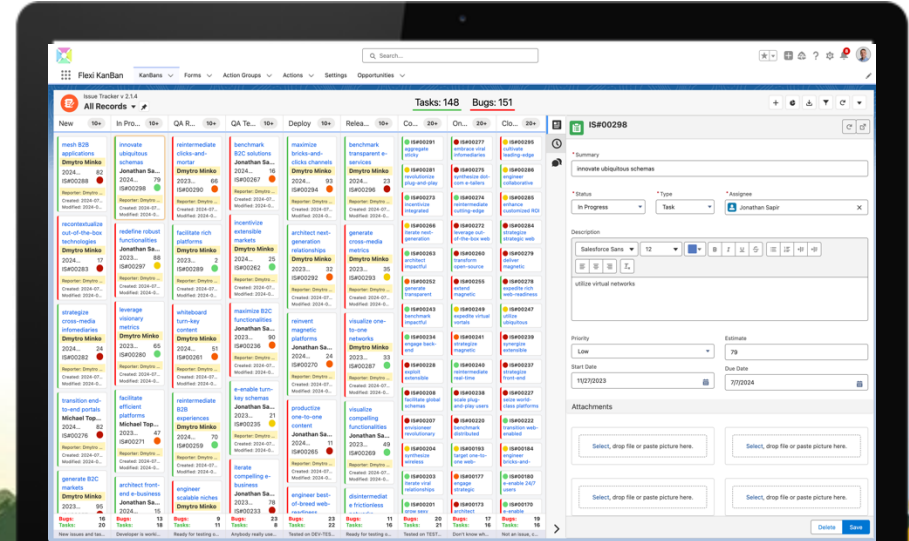
Standard Kanban View



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\$263,080	\$355,104	\$343,336	\$525,318	\$771,537	\$407,331	\$231,937	\$1,289,792
Ameliorated 4th generation email...	Adaptive 4th generation application...	Adaptive logistical extension...	Centralized local analyzer...	Automated zero tolerance middle...	Advanced systematic knowledge...	Advanced dedicated facility...	Burlington Textiles Weaving Plant...
United D & S, Singapore	United D & S, UK	United D & S, UK	Dissemination	United D & S, Singapore	United D & S, Singapore	Burlington Textiles Corp of America	W&S
Existing Customer - Upgrade	Existing Customer - Replacement	Existing Customer - Replacement	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	New Customer
Ameliorated available access...	Advanced human resource help...	Automated mediating middlewares...	Customer-focused radical defini...	Directed high-level interface...	Automated actuating open system...	Ameliorated regional facility...	Express Logistics Shandy Ser...
United D & S, Corp.	United D & S, UK	Burlington Textiles Corp of America	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Express Logistics and Transport
Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Replacement	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	New Customer
Automated 24 hour complexity...	Automated asymmetric personal...	Automated 8th generation facility...	Dis-engineered secondary array...	Cross-group system monthly work...	Customizable state administration...	Centralized facilities customer to...	Grand Hotels Emergency Emerg...
Edge Communications	Edge Communications	Burlington Textiles Corp of America	New Customer	Express Logistics and Transport	Edge Communications	University of Arizona	External Internal
Existing Customer - Upgrade	Existing Customer - Replacement	Existing Customer - Replacement	Existing Customer - Upgrade	Existing Customer - Replacement	Existing Customer - Replacement	Existing Customer - Replacement	New Customer
Rebalanced responsive database...	Centralized systemic capacity...	Cross-platform global core...	Digitalized methodical budgetary m...	Customer-focused non-volatile in...	Extended homogeneous Graphic L...	Cross-group client-driven chahe...	Grand Hotels & Resorts Ltd
Paycom Construction Inc.	United D & S, UK	New Customer	Existing Customer - Replacement	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	External Internal
Existing Customer - Upgrade	New Customer	New Customer	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	New Customer
Customer-focused solution orien...	Clouded analytical support...	Customer-focused scalable applic...	Distributed distributed media applic...	Customizable electronic capacity...	Face to face dedicated framework...	Customer-focused homogeneous...	Grand Hotels & Resorts Ltd
Dissemination plc	Dissemination plc	Dissemination plc	Existing Customer - Replacement	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	External Internal
Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Replacement	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	New Customer
Organic fresh-thinking synergy...	Cross-group national capacity...	Digitalized neutral internet ext...	Organic uniform alliance...	Digitalized state tolerance paradig...	Face to face homogeneous meth...	Customizable high-level process l...	Genephot Shandy Generation
Edge Communications	Edge Communications	Paycom Construction Inc.	University of Arizona	Paycom Construction Inc.	Simple Account for End-users	Customizable high-level process l...	Services Partner
Existing Customer - Upgrade	New Customer	New Customer	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	New Customer
Drop the radical capacity...	Cross-platform community base...	Down-sized directional hub...	Express Logistics Portable Text...	Distributed matrix archive...	Focused fresh-thinking internet...	Dis-engineered directional hardw...	Edge Emergency Generator
Existing Customer - Upgrade	United D & S, Singapore	United D & S, Singapore	Existing Customer - Upgrade	United D & S, Singapore	United D & S, Singapore	Burlington Textiles Corp of America	World of Warcraft
Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	New Customer
Function-based bandwidth reconf...	Cross-platform regional hub...	Down-sized tangible synergy...	External Referral	Behavioral high-level product...	Fundamental high-level product...	Edge L.A.	Edge Communications
Dissemination plc	University of Arizona	Burlington Textiles Corp of America	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	World of Warcraft
Existing Customer - Upgrade	Existing Customer - Replacement	Existing Customer - Replacement	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	New Customer

Flexi Kanban View



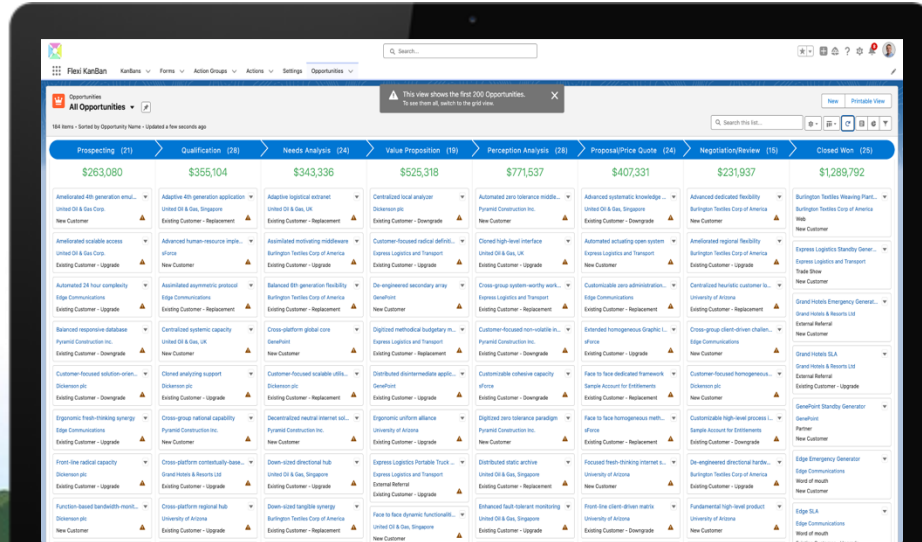
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New	In Progress	QA Test	QA Test	Deploy	Release	Completed	Archived
new 202 applications Dmytro Miko 2024-01-01 Created 2024-01-01 Modified 2024-01-01	innovate ubiquitous schemes Jonathan S... 2023-12-28 Created 2024-01-01 Modified 2024-01-01	transformative click-and-... Jonathan S... 2023-12-28 Created 2024-01-01 Modified 2024-01-01	benchmark ECC solutions Jonathan S... 2023-12-28 Created 2024-01-01 Modified 2024-01-01	responsive bridge-and-... Jonathan S... 2023-12-28 Created 2024-01-01 Modified 2024-01-01	benchmark transparent e-... Dmytro Miko 2024-01-01 Created 2024-01-01 Modified 2024-01-01	innovative enterprise anal... Dmytro Miko 2024-01-01 Created 2024-01-01 Modified 2024-01-01	innovative enterprise anal... Dmytro Miko 2024-01-01 Created 2024-01-01 Modified 2024-01-01
Ameliorated 4th generation email...	Adaptive 4th generation application...	Adaptive logistical extension...	Centralized local analyzer...	Automated zero tolerance middle...	Advanced systematic knowledge...	Advanced dedicated facility...	Burlington Textiles Weaving Plant...
United D & S, Singapore	United D & S, UK	United D & S, UK	Dissemination	United D & S, Singapore	United D & S, Singapore	Burlington Textiles Corp of America	W&S
Existing Customer - Upgrade	Existing Customer - Replacement	Existing Customer - Replacement	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	New Customer
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United D & S, Corp.	United D & S, UK	Burlington Textiles Corp of America	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Express Logistics and Transport
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Edge Communications	Edge Communications	Burlington Textiles Corp of America	New Customer	Express Logistics and Transport	Edge Communications	University of Arizona	External Internal
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Existing Customer - Upgrade	New Customer	New Customer	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	New Customer
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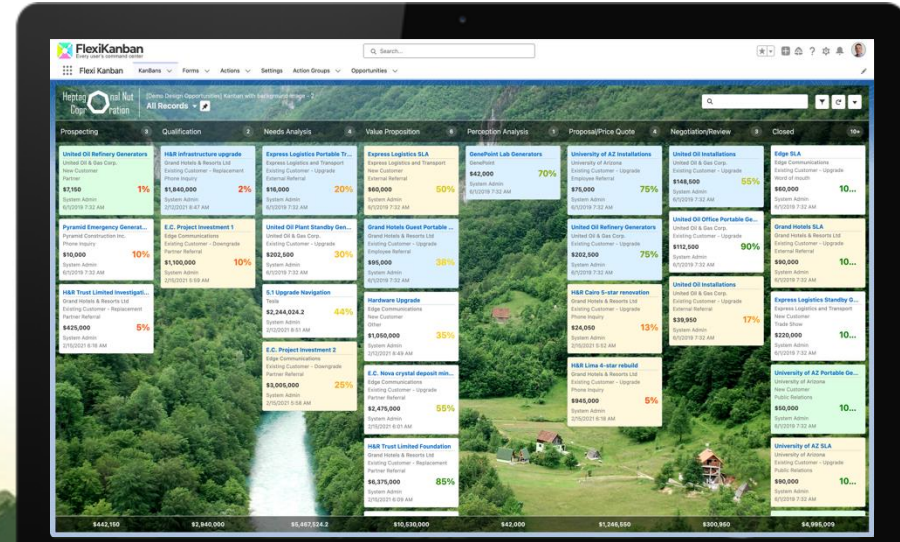
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Ameliorated 4th generation email...	Adaptive 4th generation application...	Adaptive logistical extension...	Centralized local analyzer...	Automated zero tolerance middle...	Advanced systematic knowledge...	Advanced dedicated facility...	Burlington Textiles Weaving Plant...
United Oil & Gas Corp.	United Oil & Gas, UK	United Oil & Gas, UK	Dissemination	United Oil & Gas, Singapore	United Oil & Gas, Singapore	Burlington Textiles Corp of America	Wab
New Customer	Existing Customer - Replacement	Existing Customer - Replacement	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	New Customer	New Customer
Ameliorated available access...	Advanced human resource help...	Automated mediating middleware...	Customer-focused radical definiti...	Directed third interface...	Automated activating open system...	Ameliorated regional facility...	Express Logistics Standby Ser...
United Oil & Gas Corp.	United Oil & Gas Corp.	Burlington Textiles Corp of America	Existing Customer - Upgrade	United Oil & Gas, UK	Express Logistics and Transport	Existing Customer - Upgrade	Express Logistics and Transport
Existing Customer - Upgrade	New Customer	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Trade Show	New Customer
Automated 24 hour complexity...	Automated segmental protocol...	Automated 8th generation facility...	On-engineered secondary array...	Cross-group system nearby work...	Customizable zero administration...	Centralized healthcare customer to...	Grand Hotels Emergency Genera...
Edge Communications	Edge Communications	Burlington Textiles Corp of America	Dissemination	Express Logistics and Transport	Edge Communications	University of Arizona	Grand Hotels & Resorts Ltd
Existing Customer - Upgrade	Existing Customer - Replacement	Existing Customer - Replacement	New Customer	Existing Customer - Replacement	Existing Customer - Replacement	Existing Customer - Replacement	External Referral
Rebalanced responsive database...	Centralized systemic capacity...	Cross-platform global core...	Digitalized methodical budgetary m...	Customer-focused non-volatile in...	Extended homogeneous Graphic L...	Cross-group client-driven challen...	Grand Hotels Emergency Genera...
United Oil & Gas, UK	United Oil & Gas, UK	New Customer	Dissemination	United Oil & Gas, UK	Dissemination	Existing Customer - Upgrade	Grand Hotels & Resorts Ltd
Existing Customer - Upgrade	New Customer	New Customer	Existing Customer - Replacement	Existing Customer - Upgrade	Existing Customer - Upgrade	New Customer	External Referral
Customer-focused solution orient...	Directed analyzing support...	Customer-focused scalable effici...	Distributed multimedia capacity...	Customer-focused multimedia cap...	Face to face dedicated framework...	Customer-focused homogeneous...	Grand Hotels & Resorts Ltd
Dissemination	Dissemination	Dissemination	Dissemination	Dissemination	Sample Account for Environments	Dissemination	External Referral
Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Replacement	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Replacement	New Customer	Existing Customer - Upgrade
Organic fresh-thinking synergy...	Cross-group national capacity...	Demonstrated neutral interest ad...	Organic uniform alliance...	Digitalized zero tolerance paradig...	Face to face homogeneous meth...	Customizable high-level process l...	Grand Hotels & Resorts Ltd
Edge Communications	Edge Communications	University of Arizona	Dissemination	United Oil & Gas, Singapore	Dissemination	Existing Customer - Upgrade	Partner
Existing Customer - Upgrade	New Customer	New Customer	Existing Customer - Replacement	Existing Customer - Upgrade	Existing Customer - Replacement	Existing Customer - Upgrade	New Customer
From the radical capacity...	Cross-platform communally base...	Down-sized directional hub...	Express Logistics Portable Trac...	Distributed matrix archive...	Focused fresh-thinking internal m...	On-engineered directional techn...	Edge Emergency Generator
Existing Customer - Upgrade	Grand Hotels & Resorts Ltd	United Oil & Gas, Singapore	Existing Customer - Upgrade	United Oil & Gas, Singapore	United Oil & Gas, Singapore	Burlington Textiles Corp of America	World of Health
New Customer	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Replacement	Existing Customer - Upgrade	Existing Customer - Upgrade	New Customer
Function-based bandwidth reord...	Cross-platform regional hub...	Down-sized tangible synergy...	Face to face dynamic functional...	Enhanced both relevant monitoring...	Fluent the client-driven matrix...	Fundamental high-level product...	Edge SLA
Dissemination	University of Arizona	Burlington Textiles Corp of America	United Oil & Gas, Singapore	United Oil & Gas, Singapore	Existing Customer - Upgrade	University of Arizona	Edge Communications
New Customer	Existing Customer - Upgrade	Existing Customer - Replacement	New Customer	Existing Customer - Upgrade	New Customer	New Customer	World of Health

Flexi Kanban View



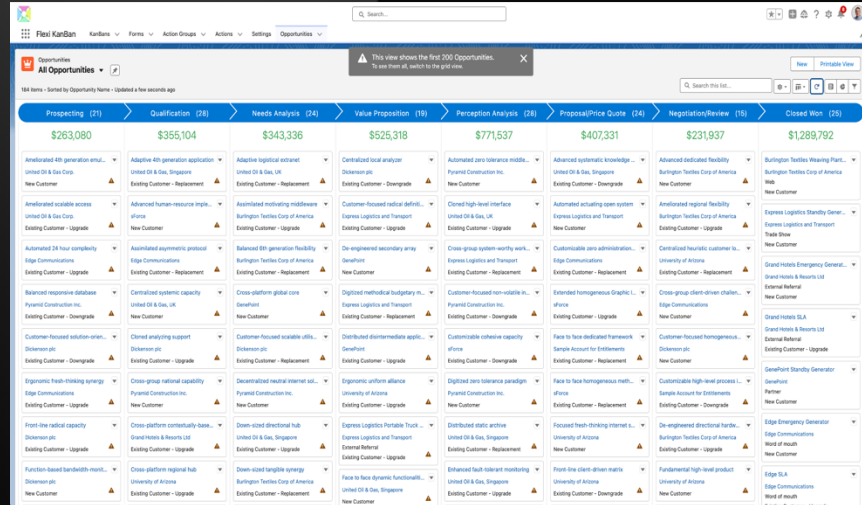
This view shows the first 200 Opportunities. To see them all, switch to the grid view.

Prospecting	Qualification	Needs Analysis	Value Proposition	Perception Analysis	Proposal/Price Quote	Negotiation/Review	Closed
United Oil Refinery Generators	H&B Infrastructure upgrade	Express Logistics Portable Tr...	Express Logistics SLA	Dissemination Lab Generators	University of AZ Installations	United Oil Installations	Edge SLA
United Oil & Gas Corp.	Grand Hotels & Resorts Ltd	Express Logistics and Transport	Express Logistics and Transport	United Oil & Gas Corp.	University of Arizona	United Oil & Gas Corp.	Edge Communications
New Customer	Existing Customer - Replacement	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade
System Admin	System Admin	System Admin	System Admin	System Admin	System Admin	System Admin	System Admin
\$1,180	\$1,845,000	\$16,000	\$80,000	\$42,000	\$175,000	\$148,500	\$60,000
1%	2%	20%	50%	70%	75%	65%	10...
Pyramid Emergency Genera...	E.C. Project Investment 1	United Oil Plant Standby Ser...	Grand Hotels Guest Portable ...	United Oil Refinery Generators	United Oil & Gas Corp.	United Oil & Gas Corp.	Grand Hotels SLA
Pyramid Construction Inc.	Edge Communications	United Oil & Gas Corp.	Grand Hotels & Resorts Ltd	United Oil & Gas Corp.	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade
New Customer	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade
System Admin	System Admin	System Admin	System Admin	System Admin	System Admin	System Admin	System Admin
\$20,000	\$1,180,000	\$20,000	\$95,000	\$175,000	\$175,000	\$175,000	\$90,000
10%	10%	30%	38%	75%	90%	90%	10...
H&B Trust Limited Investigat...	S.I. Upgrade Navigation	Hardware Upgrade	H&B Care 5-star renovation	United Oil & Gas Corp.	United Oil & Gas Corp.	United Oil & Gas Corp.	Express Logistics Standby S...
Grand Hotels & Resorts Ltd	United Oil & Gas Corp.	United Oil & Gas Corp.	Grand Hotels & Resorts Ltd	United Oil & Gas Corp.	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade
Existing Customer - Replacement	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade
System Admin	System Admin	System Admin	System Admin	System Admin	System Admin	System Admin	System Admin
\$425,000	\$2,244,024.2	\$1,590,000	\$24,000	\$24,000	\$128,900	\$128,900	\$270,000
5%	44%	35%	13%	17%	5%	5%	10...
H&B Trust Limited Foundatio...	E.C. Project Investment 2	E.C. Project Investment 2	H&B Trust Limited Foundatio...	United Oil & Gas Corp.	United Oil & Gas Corp.	United Oil & Gas Corp.	University of AZ SLA
Grand Hotels & Resorts Ltd	United Oil & Gas Corp.	United Oil & Gas Corp.	Grand Hotels & Resorts Ltd	United Oil & Gas Corp.	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade
Existing Customer - Replacement	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade	Existing Customer - Upgrade
System Admin	System Admin	System Admin	System Admin	System Admin	System Admin	System Admin	System Admin
\$1,475,000	\$2,244,024.2	\$1,590,000	\$24,000	\$24,000	\$128,900	\$128,900	\$270,000
25%	25%	55%	5%	5%	5%	5%	10...

Flexi Kanban: Break Free From Salesforce Kanban Limits

Any number of records, any number of card fields, color-coding, and much more.

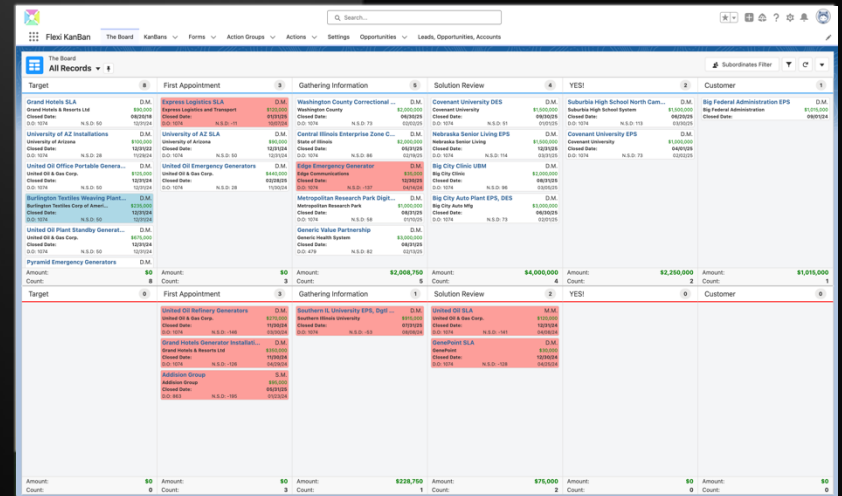
Standard Kanban View



This view shows the first 200 Opportunities. To see them all, switch to the grid view.

Prospecting (21)	Qualification (28)	Needs Analysis (24)	Value Proposition (19)	Perception Analysis (26)	Proposal/Pricing Quote (24)	Negotiation/Review (16)	Closed Won (25)
\$263,080	\$355,104	\$343,336	\$525,318	\$771,537	\$407,331	\$231,937	\$1,289,792
Ameliorated 4th generation arma... United Oil & Gas Corp. New Customer	Adaptive 4th generation applica... United Oil & Gas, Singapore Existing Customer - Replacement	Adaptive logistical extract... United Oil & Gas, UK New Customer	Centralized local analyzer Downstream plc Existing Customer - Downgrade	Automated zero tolerance middle... United Oil & Gas, Singapore Existing Customer - Upgrade	Advanced systems knowledge... United Oil & Gas, Singapore New Customer	Advanced industrial facility Burlington Textiles Corp of America New Customer	Burlington Textiles Weaving Plant... Burlington Textiles Corp of America New Customer

Flexi Kanban View



This view shows the first 200 Opportunities. To see them all, switch to the grid view.

Target	First Appointment	Gathering Information	Solution Review	YES!	Customer
Grand Hotels SLA Grand Hotels & Resorts Ltd Closed Date: 1/1/2024 1/1/2024	Express Logistics SLA Express Logistics and Transport Closed Date: 1/1/2024 1/1/2024	Washington County Correctional... Washington County Closed Date: 1/1/2024 1/1/2024	Conestoga University DES Conestoga University Closed Date: 1/1/2024 1/1/2024	Suburban High School North Cent... Suburban High School North Cent... Closed Date: 1/1/2024 1/1/2024	Big Federal Administration EPS Big Federal Administration Closed Date: 1/1/2024 1/1/2024

Flexi Kanban: Getting Started

Follow these 3 steps to start crafting your Flexi Kanbans



1

Go from zero to Kanban in
seconds with

Kanban Wizard

[Click here](#)



2

Review the documentation and
unlock powerful features with

Flexi Kanban Studio

[Click here](#)



3

Use our free Slack channels to
get help and learn with the

Customer Success Team

[Click here](#)

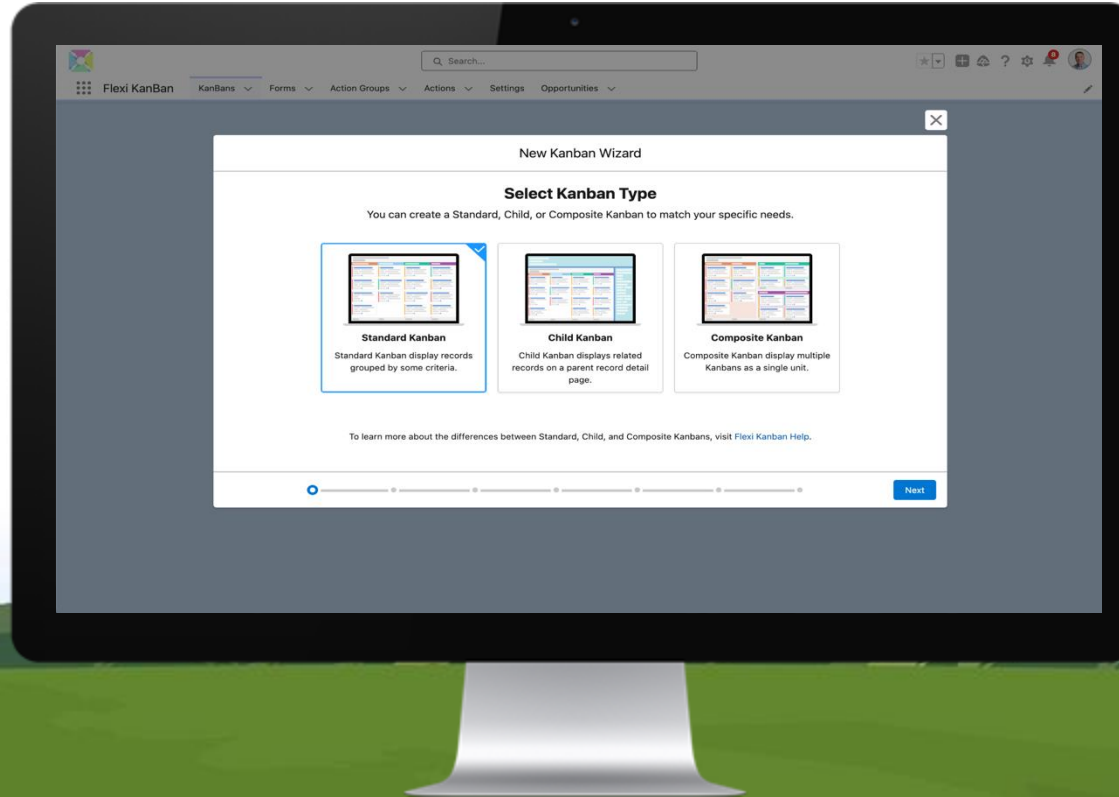
1

Getting Started Quickly with the Kanban Wizard



Getting Started Quickly with the Kanban Wizard

Master Advanced Configurations later in Flexi Kanban Studio



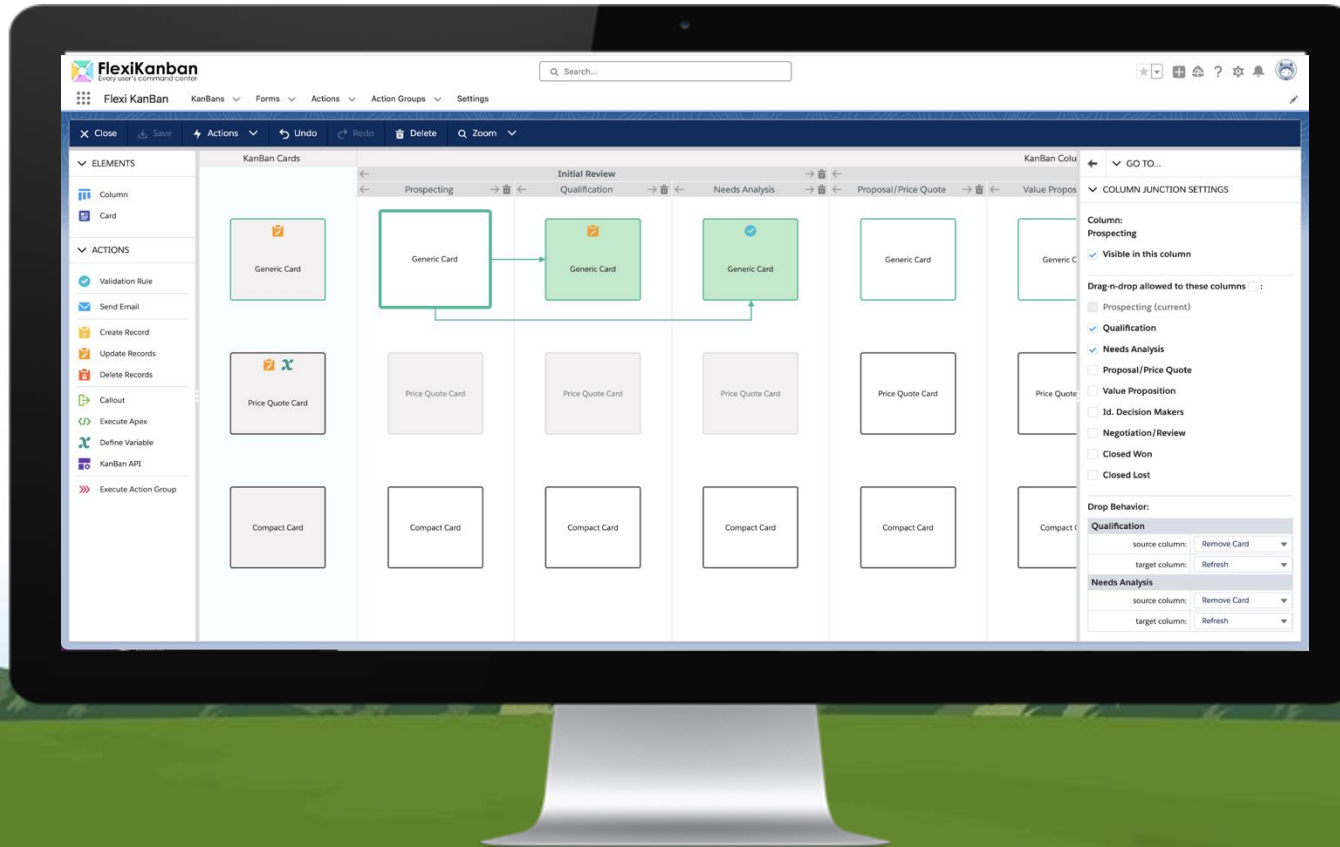
2

**Unlock powerful features
with Flexi Kanban Studio**



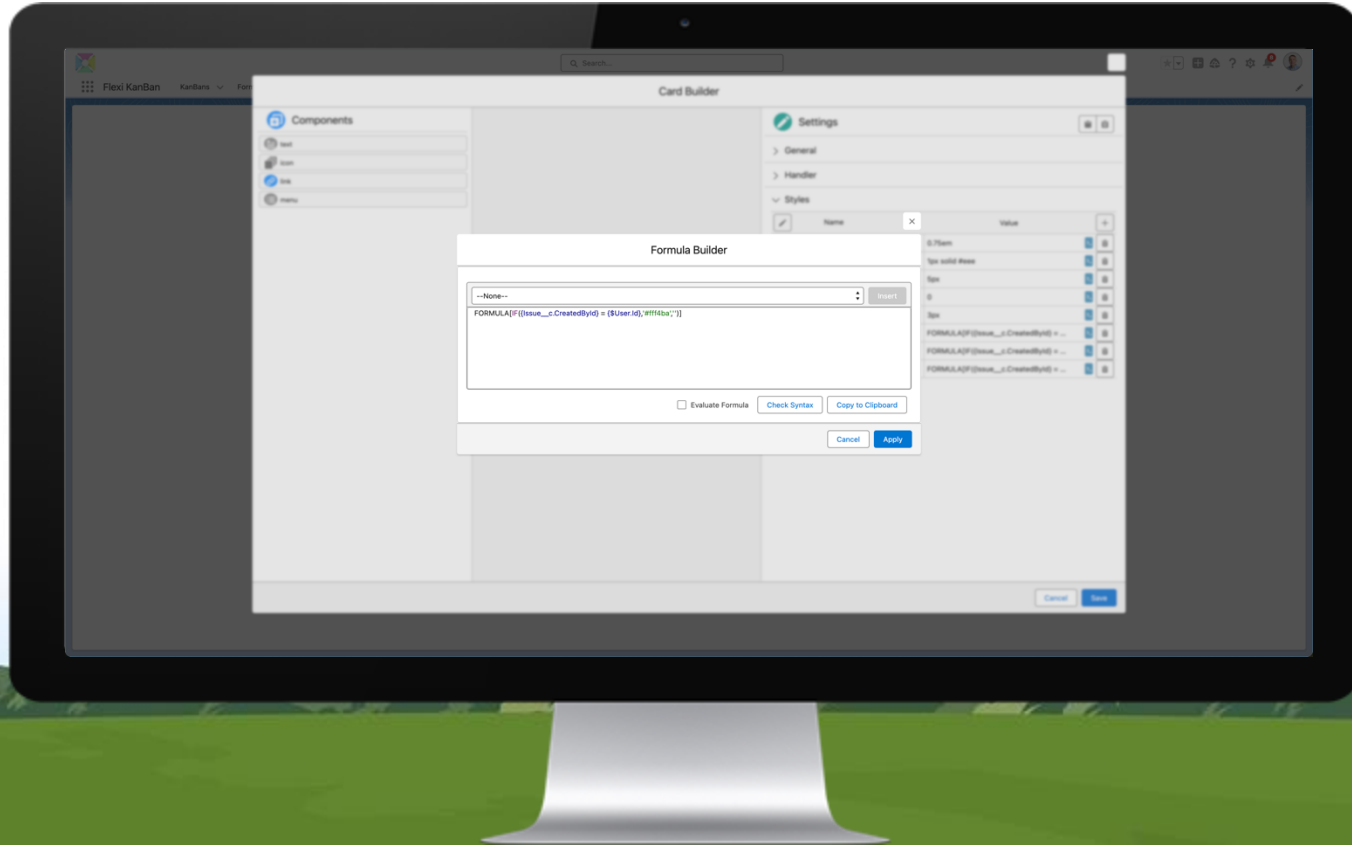
Master Advanced Configurations in Flexi Kanban Studio

Kanban Builder, Form Builder, Action Builder



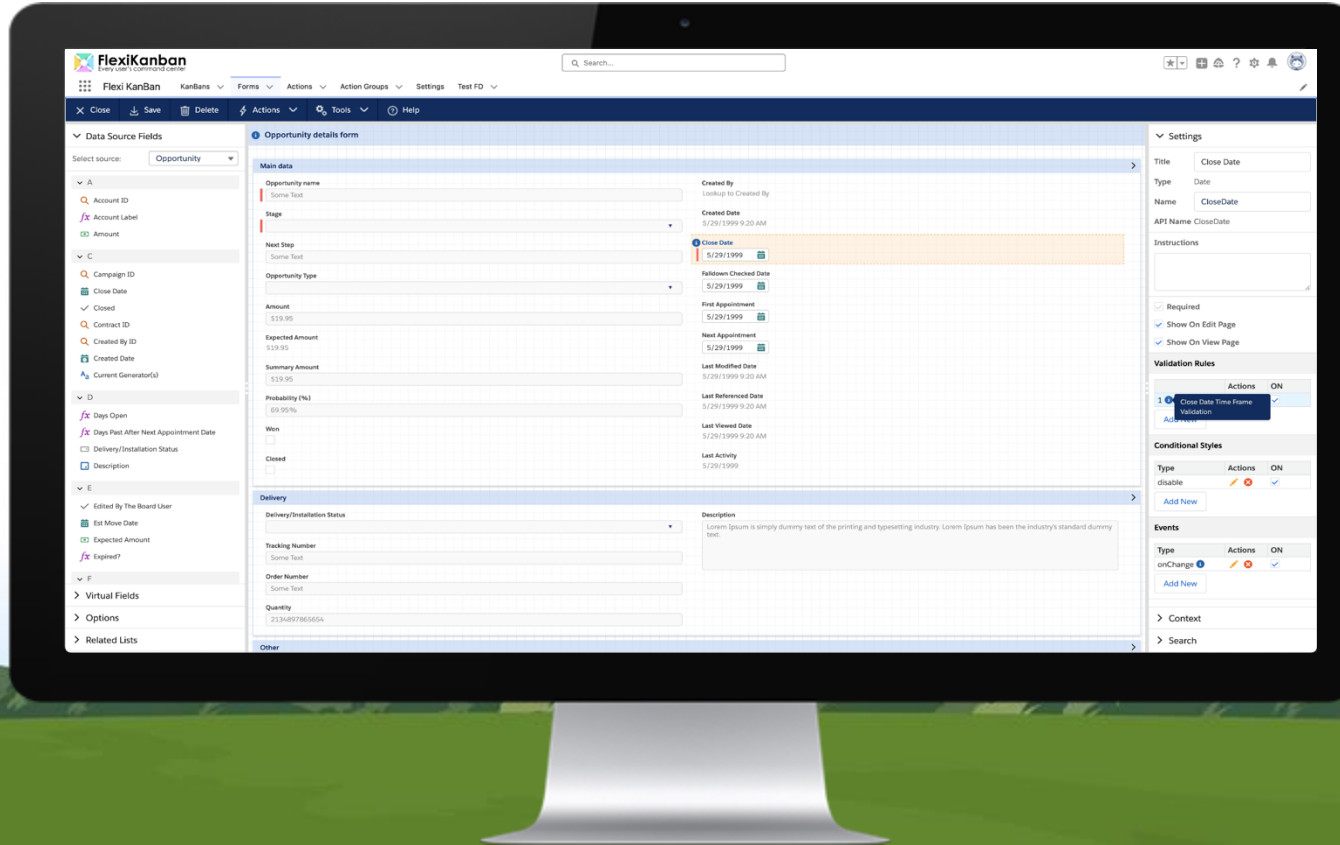
Master Advanced Configurations in Flexi Kanban Studio

Kanban Builder, Form Builder, Action Builder



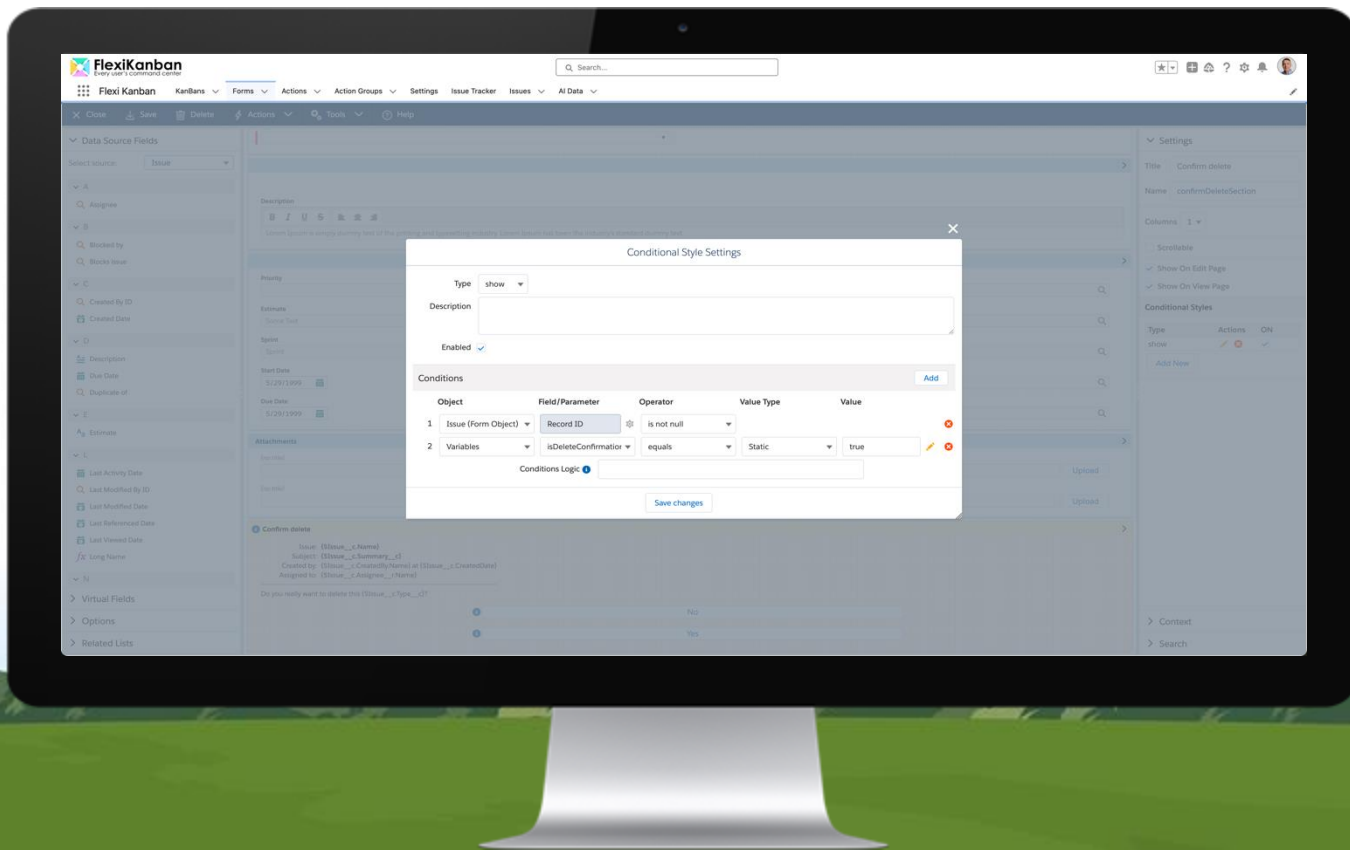
Master Advanced Configurations in Flexi Kanban Studio

Kanban Builder, Form Builder, Action Builder



Master Advanced Configurations in Flexi Kanban Studio

Kanban Builder, Form Builder, Action Builder



3

Get help and learn with the
Customer Success Team



Flexi Kanban: Customer Success Team

Use our free Slack channels to get help and learn with us.

Each client receives a dedicated channel to get help and learn with Flexi Kanban Customer Success Team.



Amazing product and great team to work with!

Flexi Kanban has been a game-changer for our Salesforce environment! It offers all the Kanban functionality we needed and then some. The flexibility and features it provides have significantly enhanced our workflow. The Flexi Kanban Customer Success Team has been exceptional in assisting us with the setup and optimizing our Kanbans, ensuring we get the most out of the product. We couldn't be happier with this addition to our toolkit.

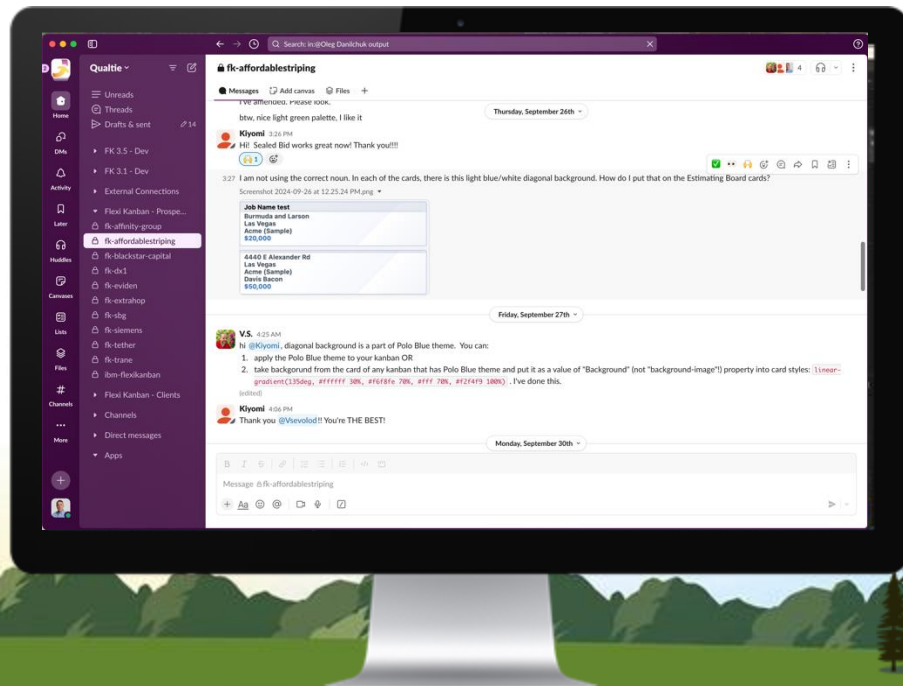
08/22/2024



Amazing support and response time

I am still in the early implementation phase but i have been working with Dmytro & Team on building a board to meet the demands of my team and workflow and i am extremely impressed! Dmytro & His team have been excellent this far on making the changes i ask and demonstrating with immediate responses. We've been searching for a salesforce app that could perform like Trello, highly recommend reaching out to this team!

08/14/2024





FlexiKanban

Every user's command center



Thank you!

Find us on [AppExchange](#) and [LinkedIn](#).

