

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 the admin performance with its helpful feature, which lets 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 customize Kanban cards as per your business preferences.

2.4 Switch Kanban

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 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.

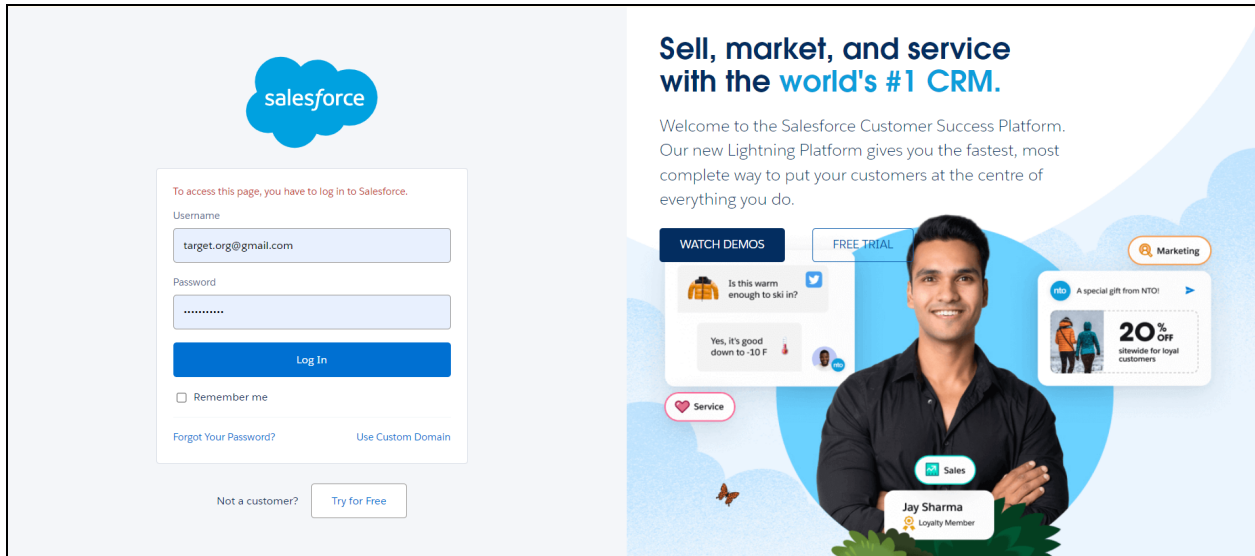
3. Installation

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

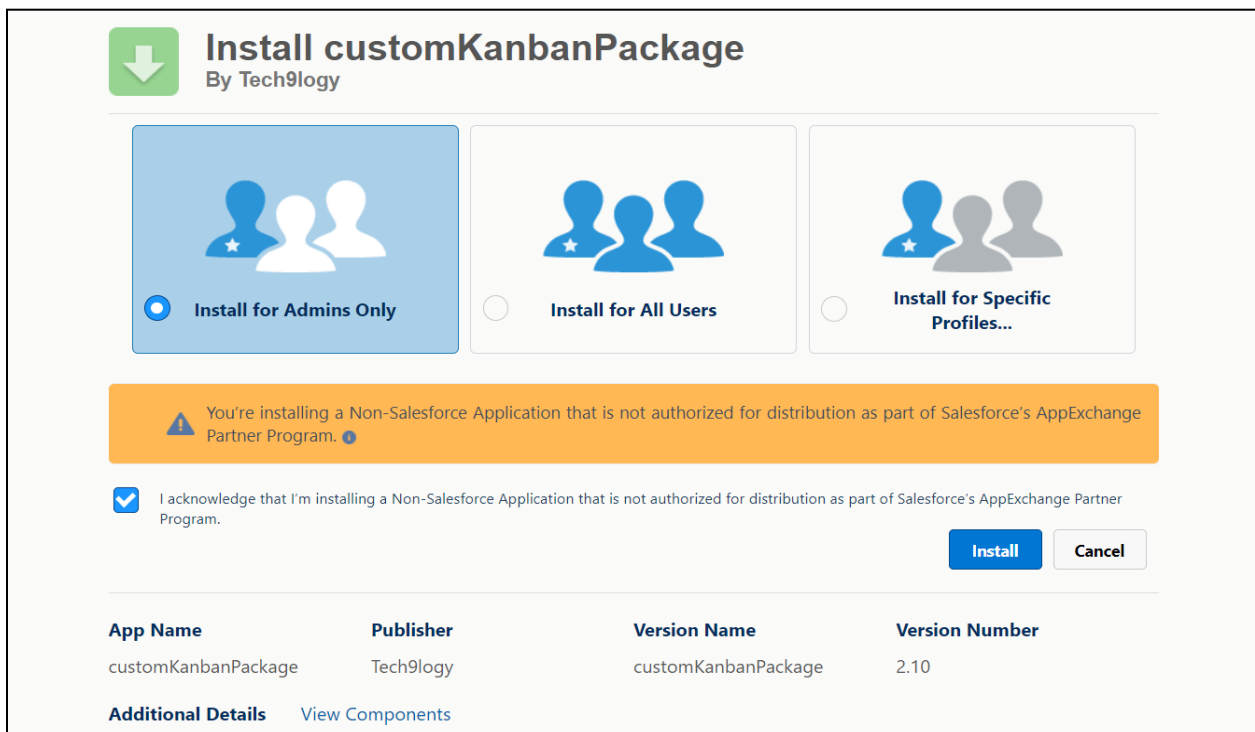
Let's get started!

- 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 User Name and Password in the dedicated sections and log in to your account.



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.

4. Key Terminology

4.1 Select Kanban

Choose 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

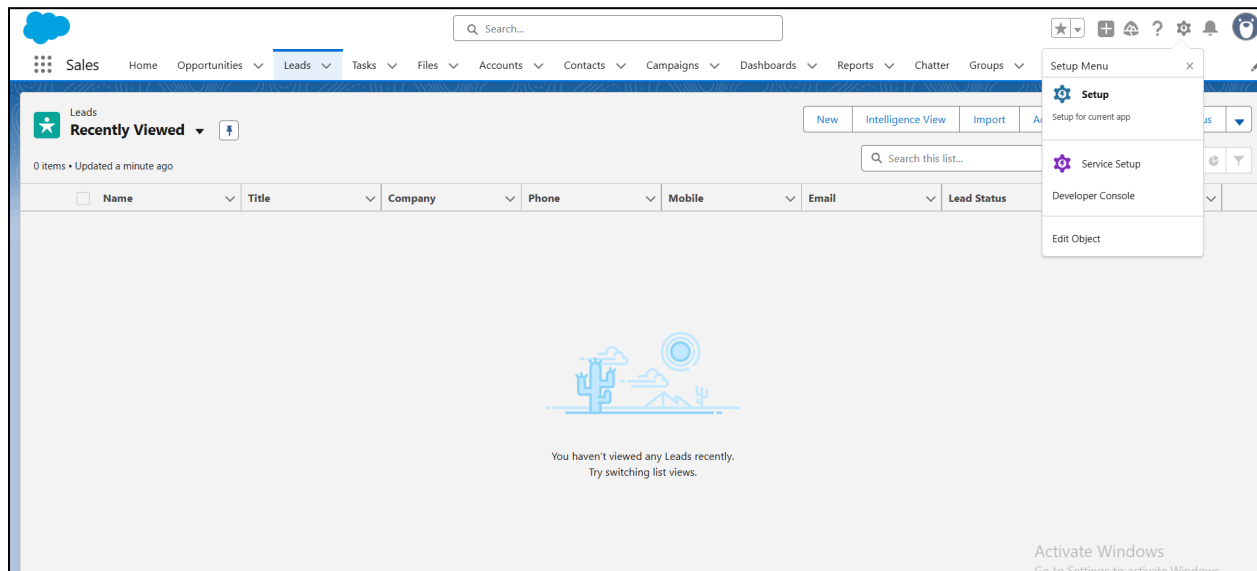
A license key is a unique code or identifier to activate and validate MigSO features or services.

5. User Documentation

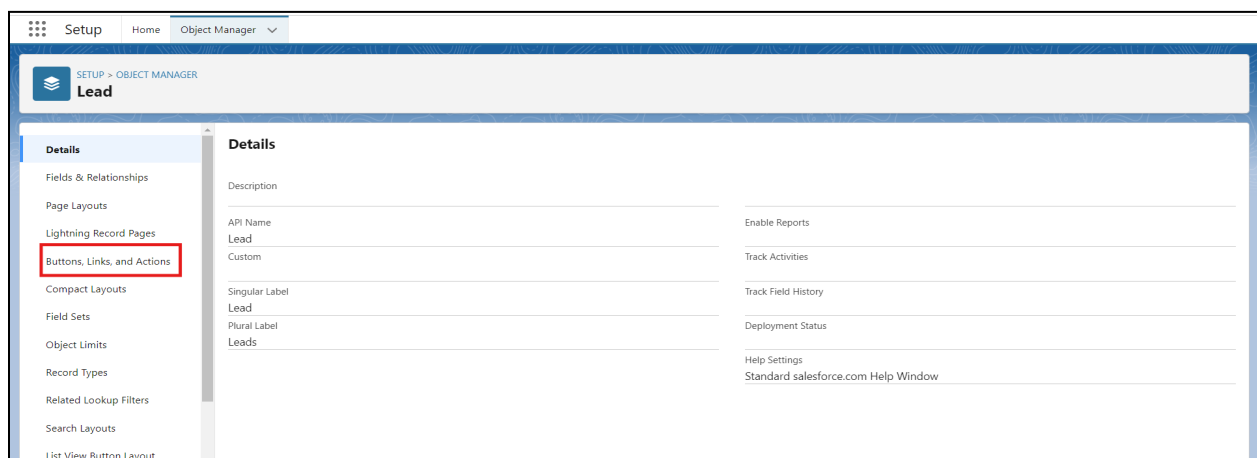
5.1 Configuration and Settings

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.

Here, you're required to go to the settings and select the Edit Object option.



From the given set of choices, click on “Buttons, Links, and Actions” and click on New Button or Link.



Enter the required mandatory fields and assign the display type as the list button. Choose behavior as Display in existing video with sidebar.

The screenshot shows the Salesforce Setup interface for the 'Lead' object. The 'Buttons, Links, and Actions' section is active, displaying the 'New Button or Link' configuration page. The 'Custom Button or Link Edit' form includes the following fields and values:

- Label:** Custom Kanban
- Name:** Custom_Kanban
- Description:** (empty)
- Display Type:** List Button (selected)
- Behavior:** Display in existing window with sidebar
- Content Source:** URL
- Syntax:** /apex/customKanban__SmartKanban?objectName=Lead
- Functions:** ABS, ACOS, ADDMONTHS, AGE

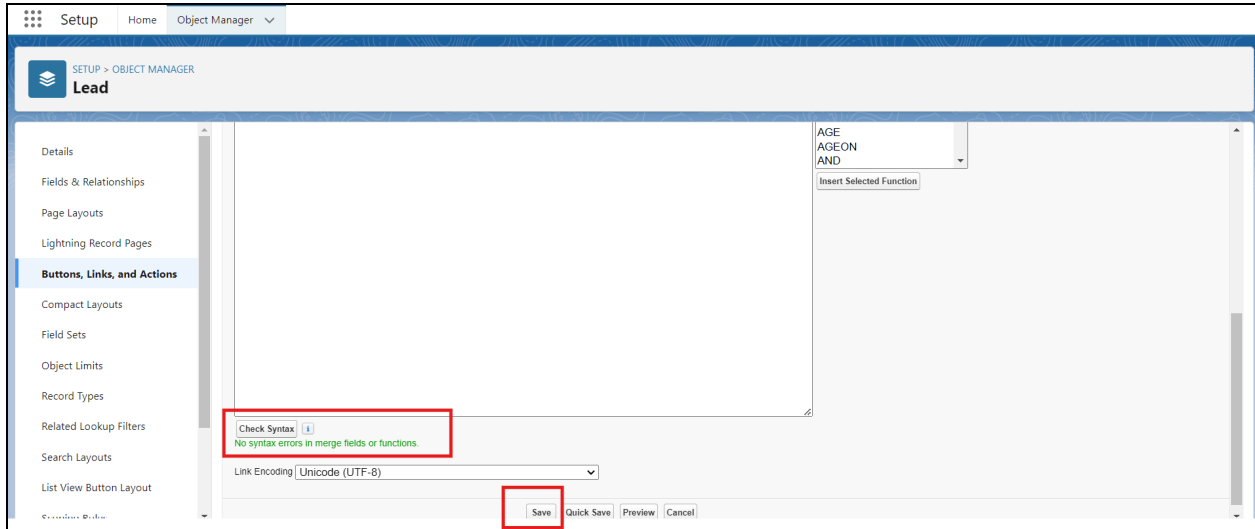
In the syntax field, enter the syntax provided below:

/apex/customKanban__SmartKanban?objectName=Account

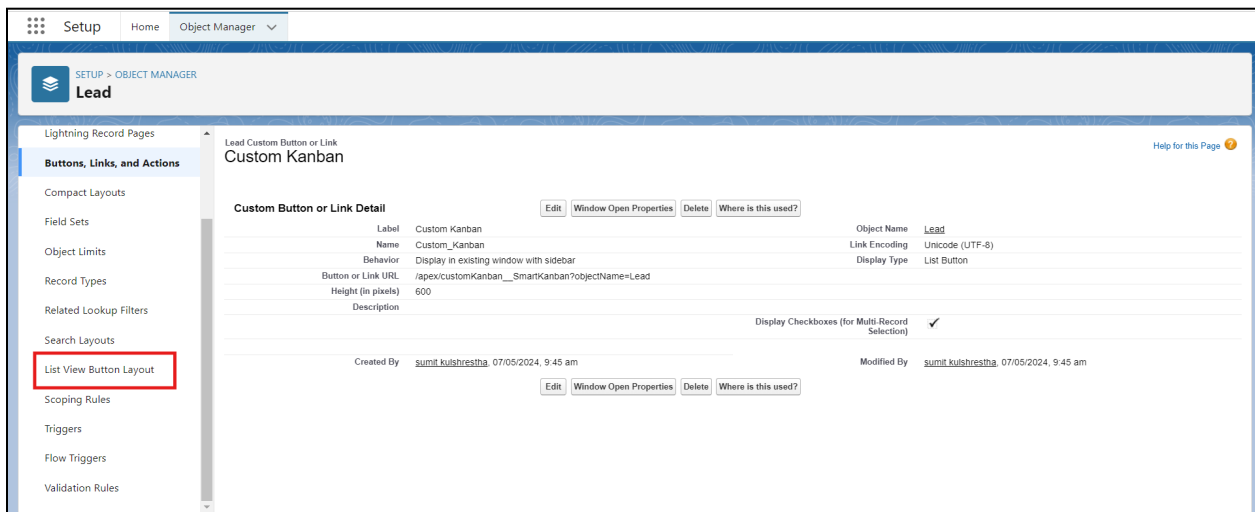
Note: You need to change the object Name as per your choice by editing the suffix in the syntax.

After entering the syntax, click on the “check syntax” button. You’ll get the message stating no syntax error if the syntax is valid.

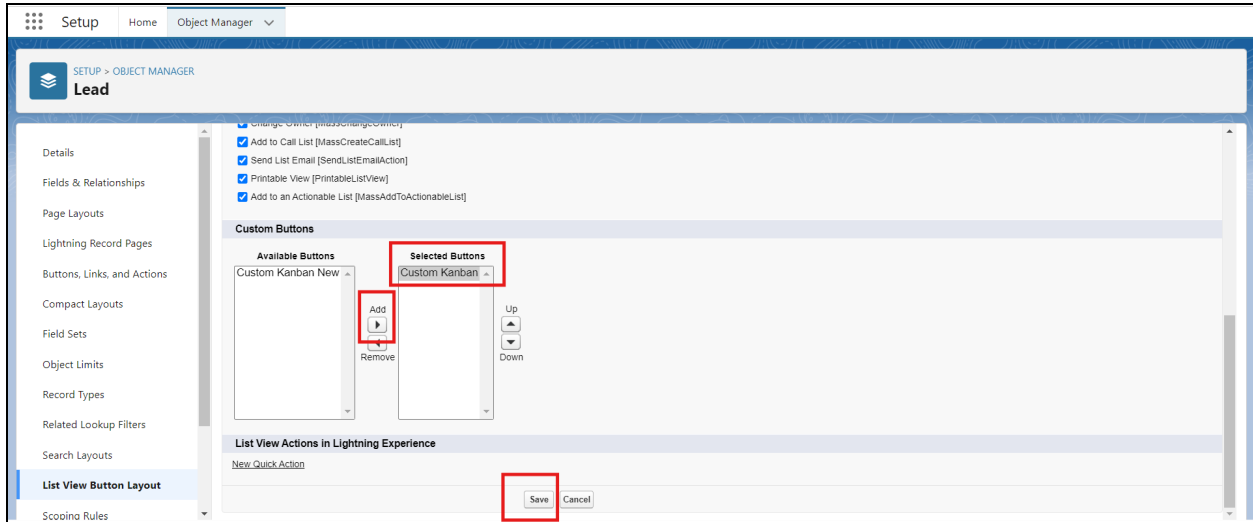
Now, you must save this newly created button.



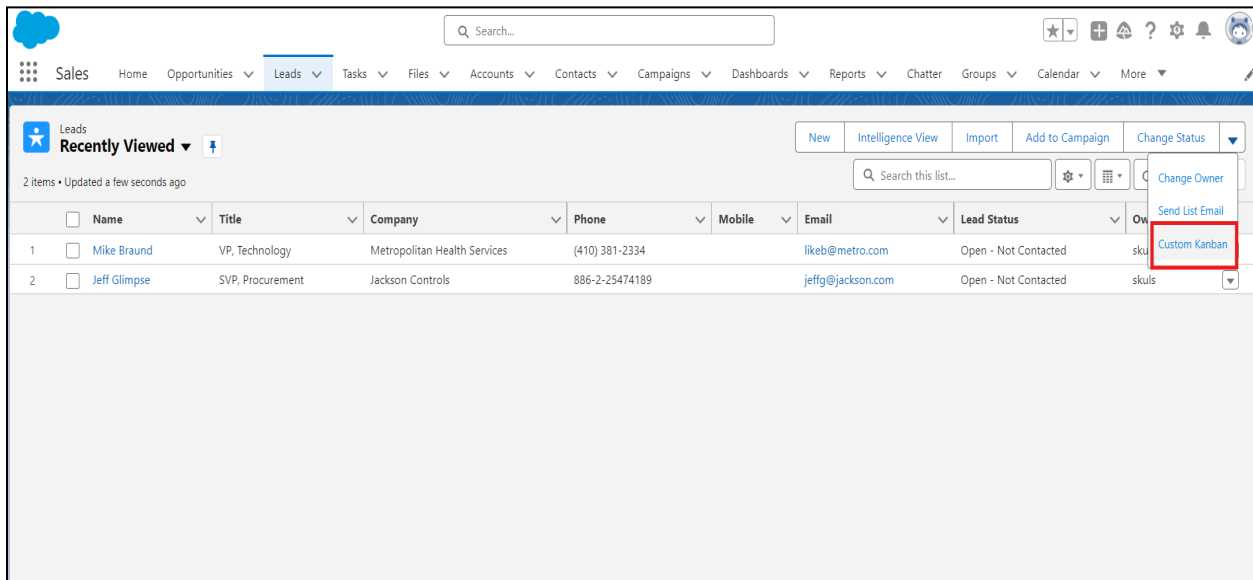
After this, go to List View Button Layout in the left menu bar, click on the down arrow next to the list view, and select edit.



In the custom buttons section, select the label name in the Available Buttons option, click on add, and the newly created button will be displayed in the selected buttons column. You must save this button setting.



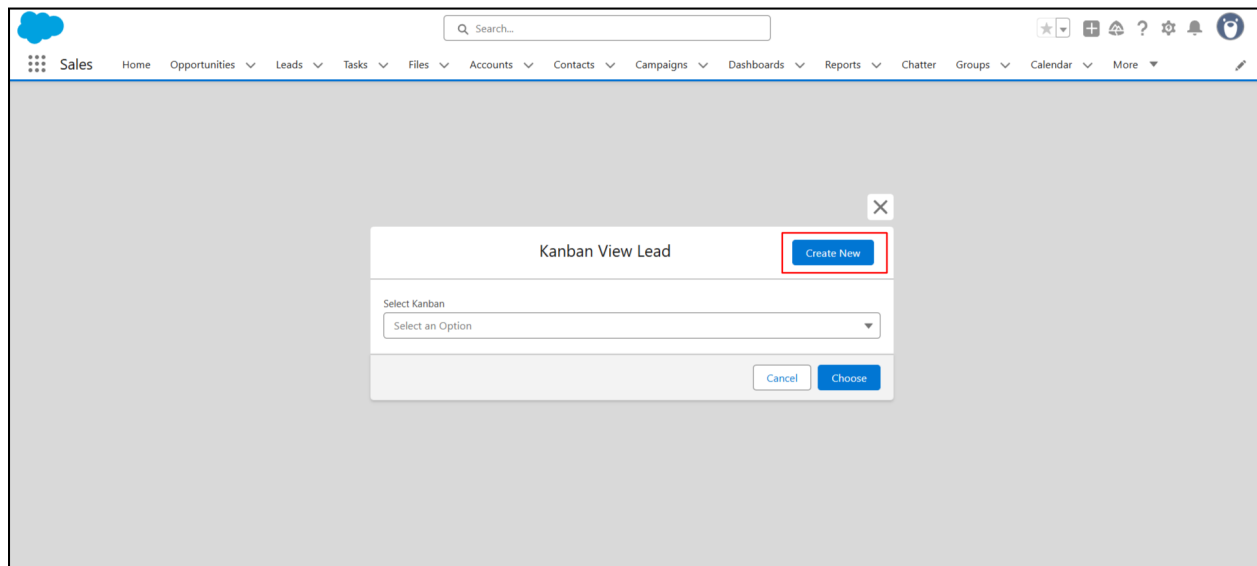
After this, return to the Lead page and click the newly created button with the sanctioned label name. Next, click the downward arrow icon and select Display as “Custom Kanban.” You’ll observe a blank screen.



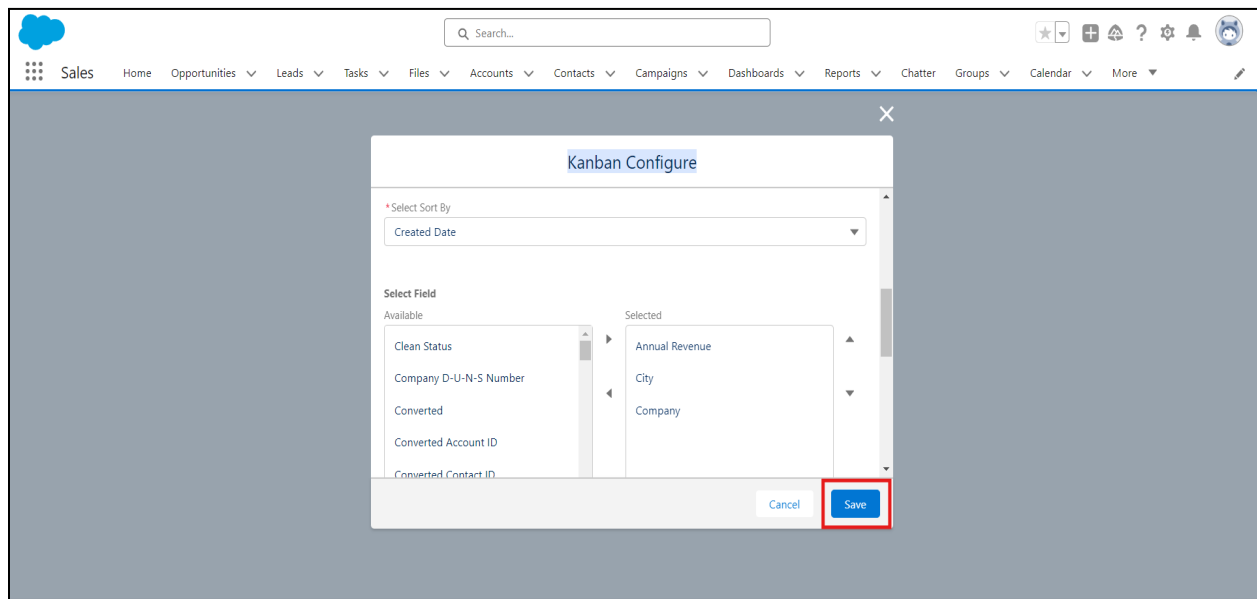
Here, click on the Custom Kanban List View Button.

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

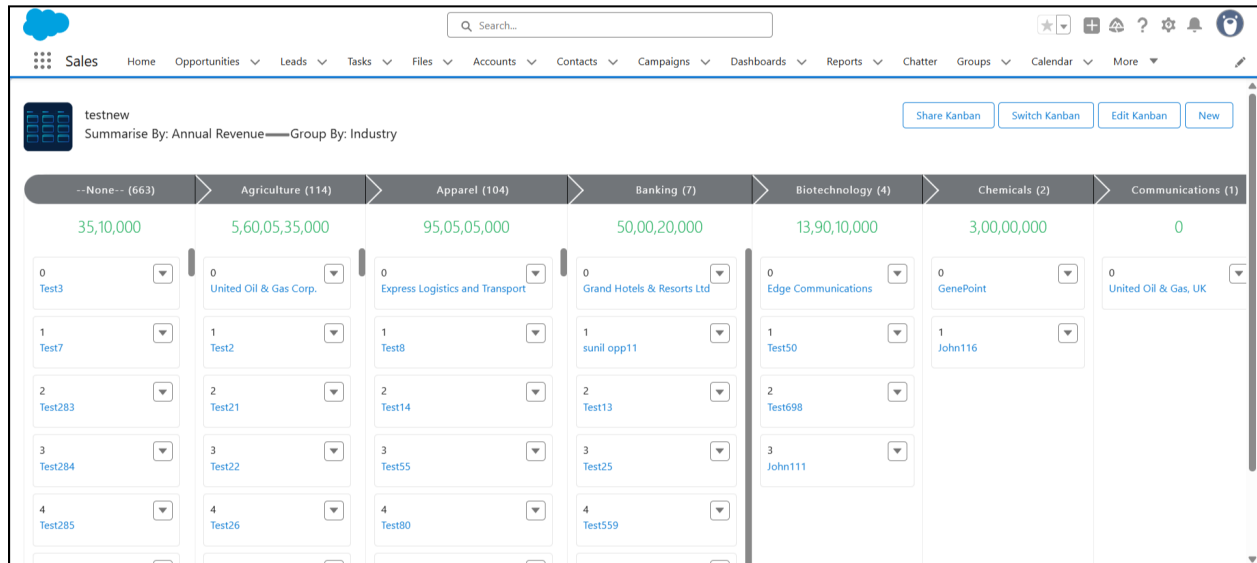
You can select the option if you have already created a Kanban Configured View. Since it's the first Custom Kanban configuration, click "Create New."



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



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



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

Click on "Share Kanban." We can Share to a different Kanban configuration view with multiple users.

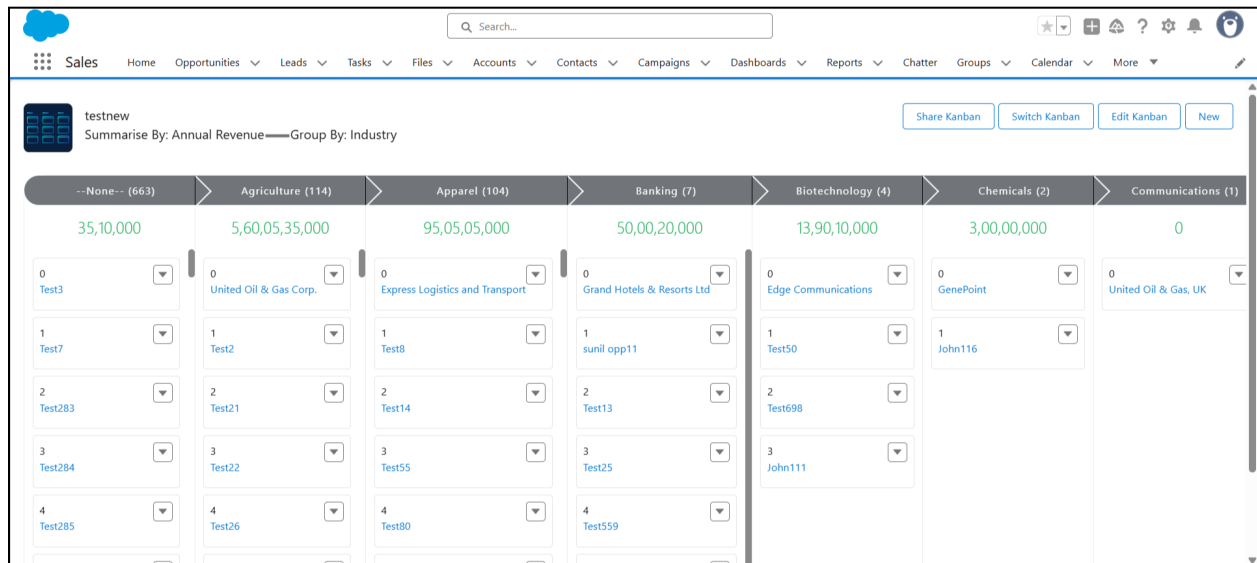
Click on "Switch Kanban." We can switch to a different Kanban configuration view by using Change Kanban View.

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.

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

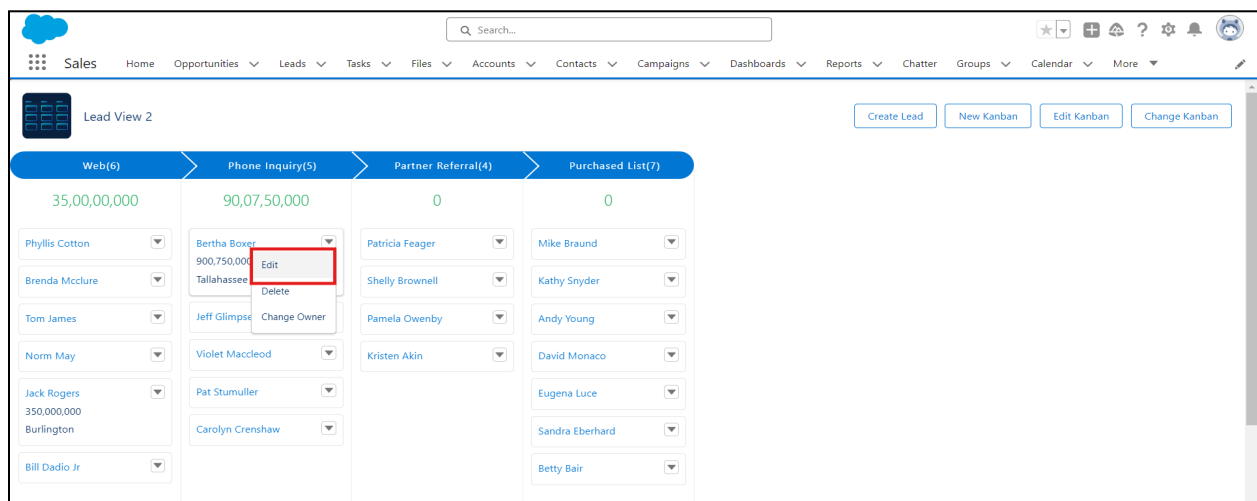


5.2 Modification of Records

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.

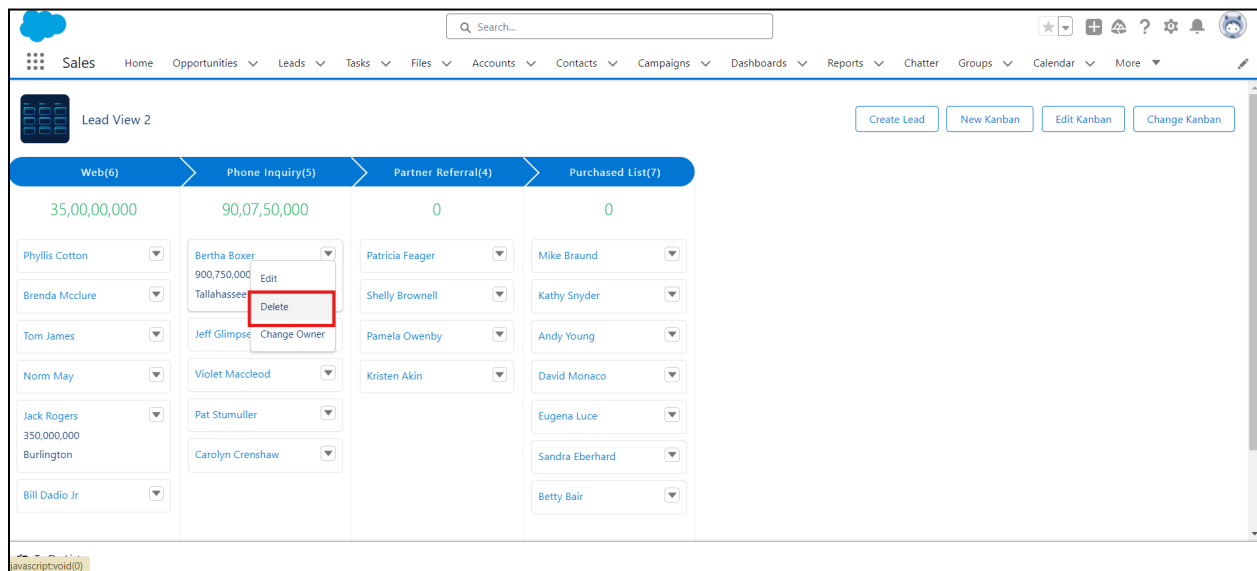
Click on edit from the given options. This will open another tab displaying the entered information on the specific card.



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

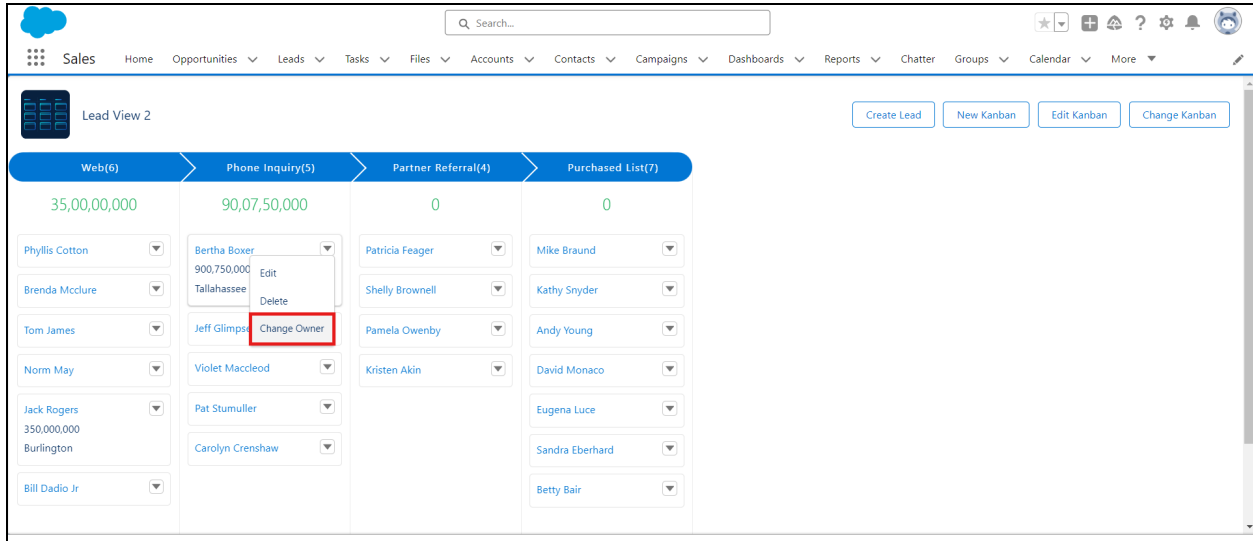
5.3 Deletion of Records

To delete a specific card from the records, select the card and click on the delete option.



5.4 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.

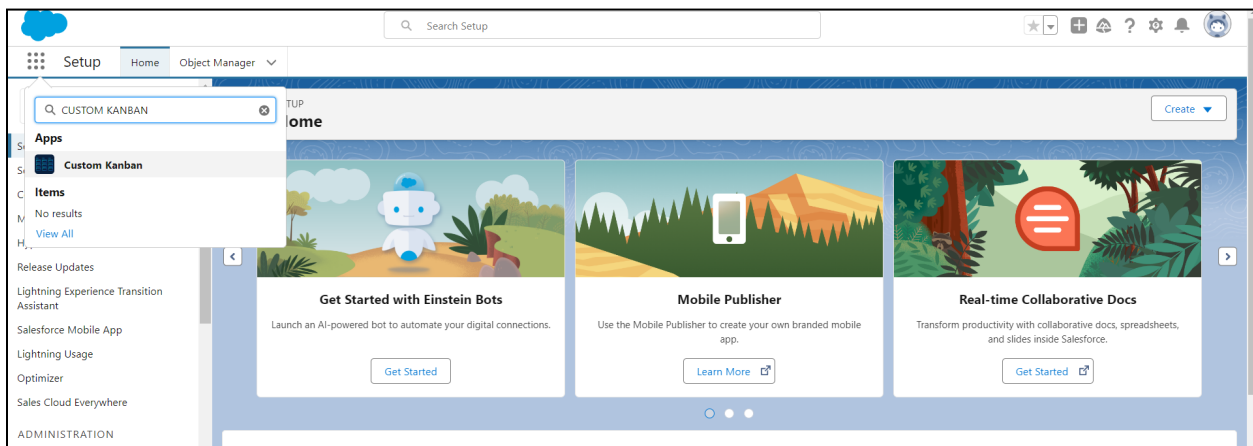


5.5 Move Things Around

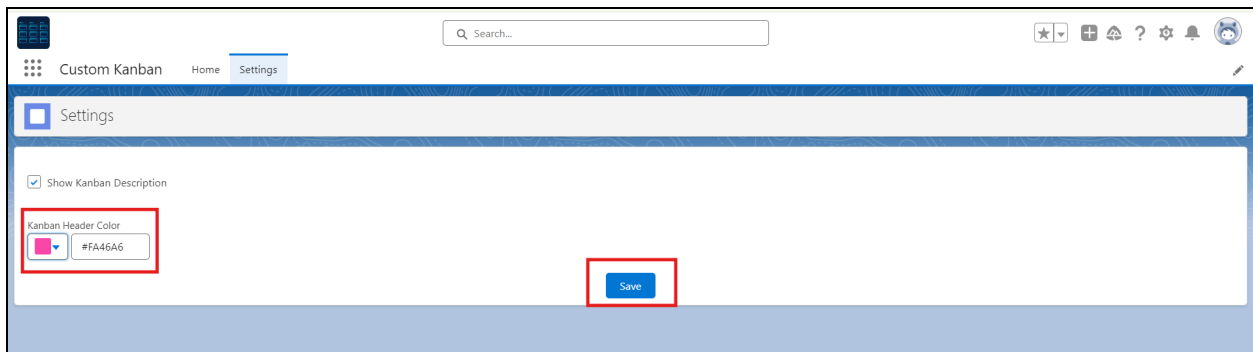
Moreover, our application's intuitive drag-and-drop functionality allows you to move the Kanban cards as your business cycle progresses.

5.6 Change Custom Kanban Header Color

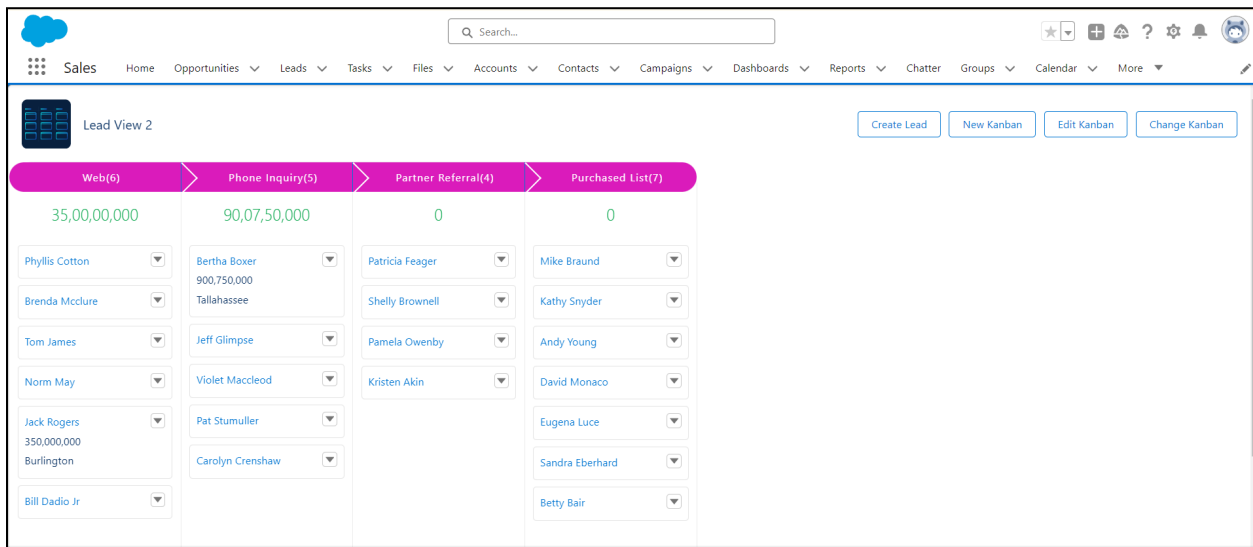
To change the Custom Kanban Group by Header Color, utilize the Custom Kanban app. Begin by clicking on the App Launcher, then search for "Custom Kanban" and click on it.



Click on "Setting". Choose "Kanban Header Color". Click on Save.



After selecting the Kanban Header Color, you can verify the color by opening the Kanban view. Click on the "Custom Kanban" List View button on the object, then select the Kanban view and click on "Choose." You will see that the Kanban Header color is the same as you picked.

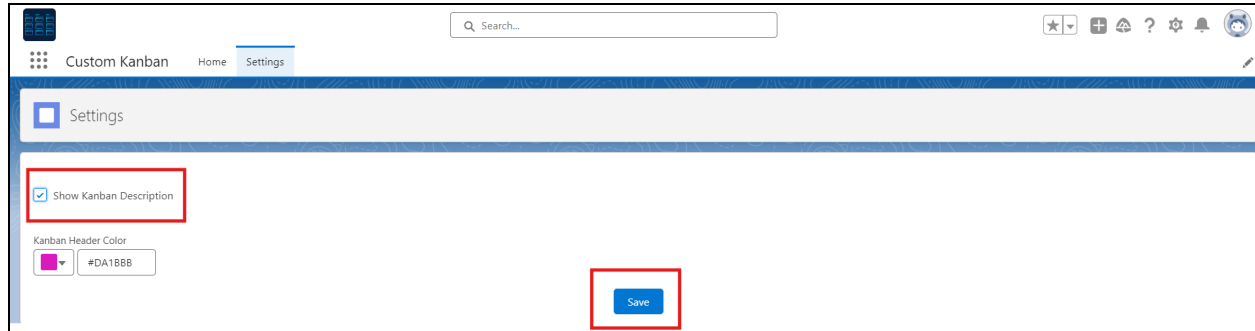


5.7 Show Kanban Description

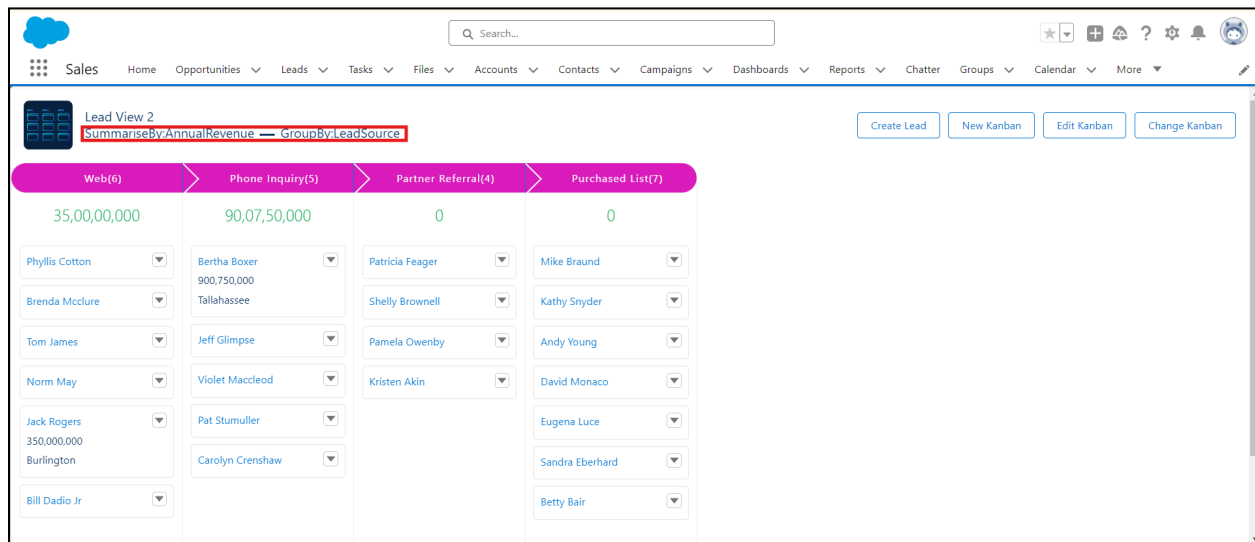
To Show Kanban Description, utilize the custom Kanban app. Begin by clicking on the App Launcher, then search for "Custom Kanban" and click on it.

Click on "Settings". Check the checkbox labeled "Show Kanban Description".

Click on "Save".



After selecting the Show Kanban Description, you can verify the Kanban Description by opening the Kanban view. Click on the "Custom Kanban" List View button on the object, then select the Kanban view and click on "Choose." You will see that the Kanban Header color is the same as the one you picked.



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

6. Live Assistance

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

- > [Skype](#)
- > [Email](#)

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.