



CAMPAIGN

KANBAN

ADMIN GUIDE



Campaign Kanban Admin Guide

Contents

Contents	2
What is Campaign Kanban?	3
How to install	4
1. Find Campaign Kanban on the AppExchange	4
2. Choose where to install the package - Production or Sandbox.	5
3. You will be asked for name, email and billing and shipping addresses	6
4. Choose the number of your Salesforce users who will need to use Campaign Kanban.	7
5. Add a payment method.	8
6. Check the details and confirm your order	9
7. Confirm Installation Details	10
9. Install in your Salesforce Org	11
How to setup (for Salesforce Administrators)	12
1. Using the Campaign Kanban App	12
2. Adding the Kanban Component to an existing Campaign Lightning Page Layout	13
3. Allocating Licenses to Salesforce users	17
4. Permission Sets	19
Support	20





What is Campaign Kanban?

Campaign Kanban supercharges the use of Salesforce's Campaign object with easy to use drag and drop functionality and powerful actions for faster and smarter campaign working.

Key features include:

- **Rapid Drag and Drop** – effortlessly move Campaign Members (Leads, Contacts & Accounts) to and from Campaign Member Status columns displayed in an intuitive Kanban board view.
- **Pop Out Side Panel** - visualise a 360 degree view of Campaign Members and related information all in the one place – no more navigating away to child records.
- **Do More with Quick Actions** - quickly edit or reassign records; create activities (tasks, events, email); convert Leads or create Opportunities directly from the Kanban side panel – equip your team to build momentum and complete repetitive jobs quicker.
- **Column Actions** - automatically convert Leads or create Opportunities in one simple drag and drop action and ensure Opportunities are appropriately attributed to Campaigns.
- **Easy Create Campaign Members** – create a new Lead or Contact and add it to a Campaign in one simple drag and drop action.
- **Easy Manage Campaign Members** – similarly, add or remove existing Leads or Contacts to a Campaign in one drag and drop action.
- **Customisable Cards & Side Panel** – Surface key information by customising Cards and Side Panel details to meet Campaign specific requirements.
- **Find, Filter and Sort** – find Campaign Members quickly with Kanban Search; filter or sort Kanban boards the way you want and on a Campaign by Campaign basis.
- **Embed Campaign Consistency** – Automate the creation of Campaign Member Status sets (Kanban columns) depending on Record Type and / or Type with our free add-on Campaign Member Status Walloper (<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000G0yVMUAZ>). Build consistency into how you manage campaigns as well as reporting.

This guide is targeted to Salesforce Administrators to show how to setup Campaign Kanban so that Salesforce users can use Campaign Kanban to maximum effect. It shows how to choose the Campaign Kanban App in Salesforce and how to add the kanban view to an existing campaign page in other Salesforce Apps. This guide lists the permission sets that are bundled into the Campaign Kanban package.

Campaign Kanban is built and published by App Bang Wallop Ltd, a Salesforce ISV partner.

For support enquires please email kanban.support@appbangwallop.com.





How to install

1. Find Campaign Kanban on the AppExchange

Search for “Campaign Kanban” on the AppExchange and choose “Get It Now”.

The screenshot shows the Salesforce AppExchange interface for the Campaign Kanban app. The app is listed under "ALL APPS" and is developed by "App Bang Wallop". The main visual is a comic book-style graphic with the text "CAMPAIGN KANBAN" in a large, bold font. Surrounding this are four speech bubbles containing the following text:

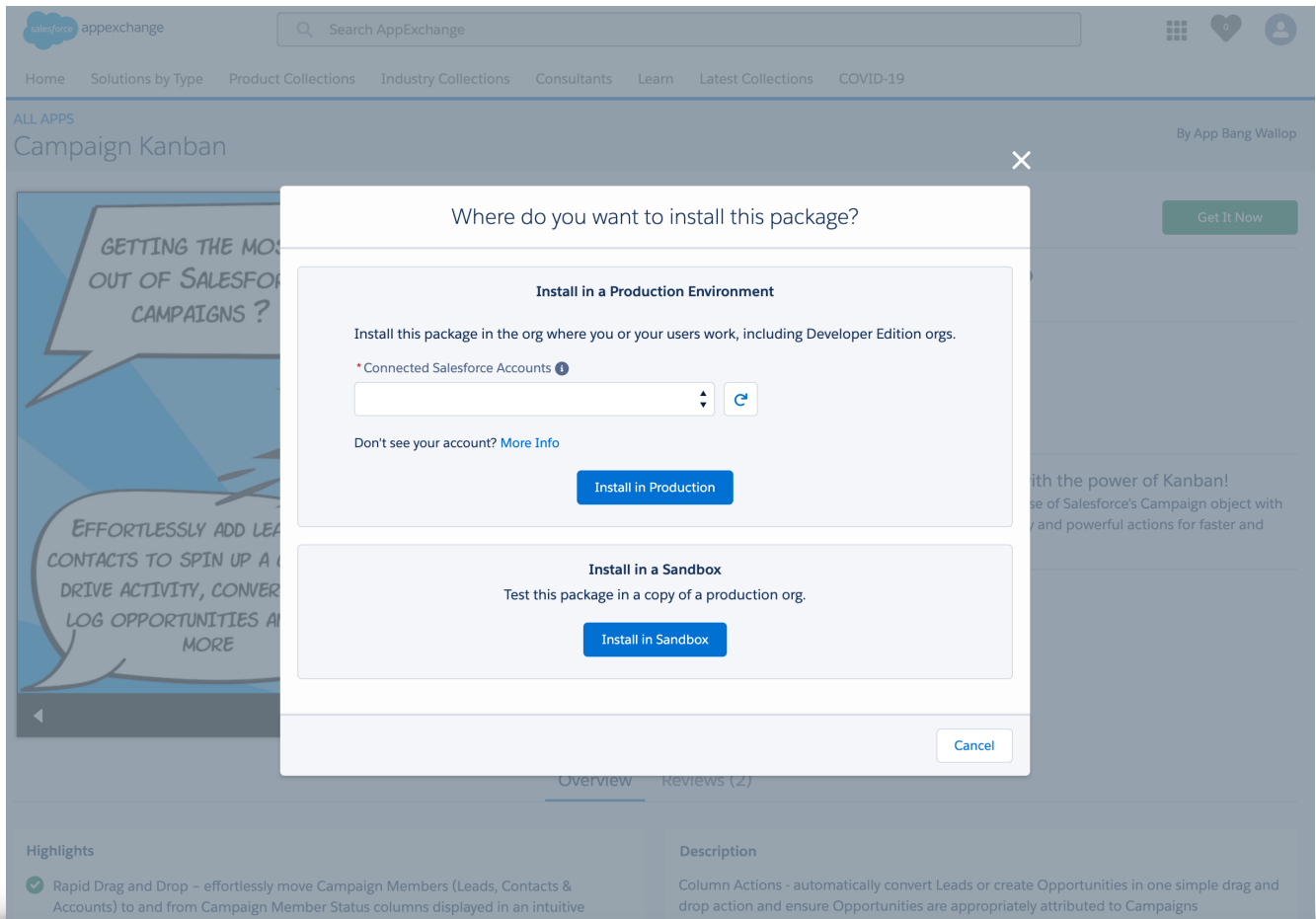
- GETTING THE MOST OUT OF SALESFORCE CAMPAIGNS ?
- SEE EVERYTHING YOU NEED IN THE ONE, EASY TO USE, DRAG AND DROP KANBAN BOARD. NO MORE SWITCHING CONTEXT OR NAVIGATING AWAY TO RELATED RECORDS ??!
- EFFORTLESSLY ADD LEADS AND CONTACTS TO SPIN UP A CAMPAIGN, DRIVE ACTIVITY, CONVERT LEADS, LOG OPPORTUNITIES AND MUCH MORE
- CAMPAIGN KANBAN TO THE RESCUE !!!

Below the graphic, there is a "1 of 11" indicator and navigation arrows. To the right of the graphic, the pricing is listed as "£150 GBP per user per year" with a note "Discounts available for nonprofits". The rating is "★★★★★ (2)" and the latest release date is "3/31/2022". A "Get It Now" button is visible in the top right corner of the app card. Below the app card, there are tabs for "Overview" and "Reviews (2)".





2. Choose where to install the package - Production or Sandbox.



If you don't see your username and org here you may need to click 'More Info' and login to your Salesforce Org.

Click 'Install in Production'. This starts the AppExchange checkout process.





3. You will be asked for name, email and billing and shipping addresses

AppExchange Checkout

Let's get started

To install this product, we need your contact and billing details. If the provider offers a free trial, you won't be charged until the trial ends.

First Name Last Name

Email

Billing Address

Country Street City State Zip/Postal

Shipping Address ☒ Same as billing address

Country Street City State Zip/Postal

[Next](#)

Fill in the details and click 'Next'





4. Choose the number of your Salesforce users who will need to use Campaign Kanban.

If you have a discount code from App Bang Wallop, now is the time to enter it.

AppExchange Checkout

Choose your payment plan

Choose the payment plan that works best for you. Then tell us the number of user licenses you'd like.

☒ £150 GBP per user per year

* Users

Coupon Code

Subtotal £0

Discount -£0

Payment (Annually) £0

Back

Next





5. Add a payment method.

AppExchange Checkout

Add a payment method

You can pay with a credit card, or transfer funds from a bank account.

Credit Card

* Card Number * CVC ⓘ

XXXX-XXXX-XXXX-XXXX

* Expires

MM / YY

[Back](#) [Next](#)

Highlights

- See the entire campaign on one page.

Description

Campaign Kanban lets you manage an entire campaign on a single, intuitive kanban board.





6. Check the details and confirm your order

AppExchange Checkout

Confirm your order

One last thing: Double check your order details, and then agree to our terms and conditions. If you're purchasing a subscription, you can edit it anytime on the My Installs and Subscriptions page of your AppExchange profile.

Payment Plan ***Users** **Coupon Code** **Subtotal** **£1500**

£150 GBP per user per year **10** **Discount** **-£0**

Payment (Annually) **£1500**

Start Date **Provider** **App Bang Wallop, UK**

Payment Method **Contact Information** **Billing Address** **Shipping Address**

Credit Card

Your bank or credit card issuer may require you to authorize future payments. If your authorization is required, the provider will notify you.

☐ I have read and agree to the [terms and conditions](#).

Back **Start Trial**





7. Confirm Installation Details

Confirm Installation Details

Package	Version
Campaign Kanban (OneDotFourty / 1.40.0)	OneDotFourty / 1.40.0
Subscription	Organization
Free Trial	
Duration	Number of Subscribers
Does Not Expire	10 Subscribers
Username	

☐ I have read and agree to the terms and conditions.

Salesforce.com Inc. is not the provider of this application but has conducted a limited security review. [Learn More about the AppExchange Security Review.](#)

[Cancel](#) [Confirm and Install](#)

Note that on this page the number of subscribers often says 10 even if you have purchased a different number of licences. This is just a glitch in Salesforce on this page that you can ignore - the purchase will be for the correct number shown on the previous 'Confirm your order' page.

Accept the terms and conditions, tick the checkbox at the bottom of the popup if you would like to hear about other products from App Bang Wallop then click 'Confirm and Install'.

After clicking 'Confirm and Install', you will then be taken to the Salesforce login page. Log into the Org that you would like to install Campaign Kanban into.

8. Login to your Salesforce Org





9. Install in your Salesforce Org

Choose which users you want to install Campaign Kanban for. If you choose 'Install for Admins Only' you can manually assign permission sets to other users so that they can also use Campaign Kanban - see 'How to setup' - Section 4. Permission Sets.

App Name	Publisher	Version Name	Version Number
Campaign Kanban	App Bang Wallop	OneDotFourtyFive	1.45

Additional Details [View Components](#)

Click 'Install'

Installing and granting access to all Users...

App Name	Publisher	Version Name	Version Number
Campaign Kanban	App Bang Wallop	OneDotFourtyFive	1.45

Additional Details [View Components](#)

Installation can take a few minutes. When the installation is finished you can start setting up Campaign Kanban as described in the next section.



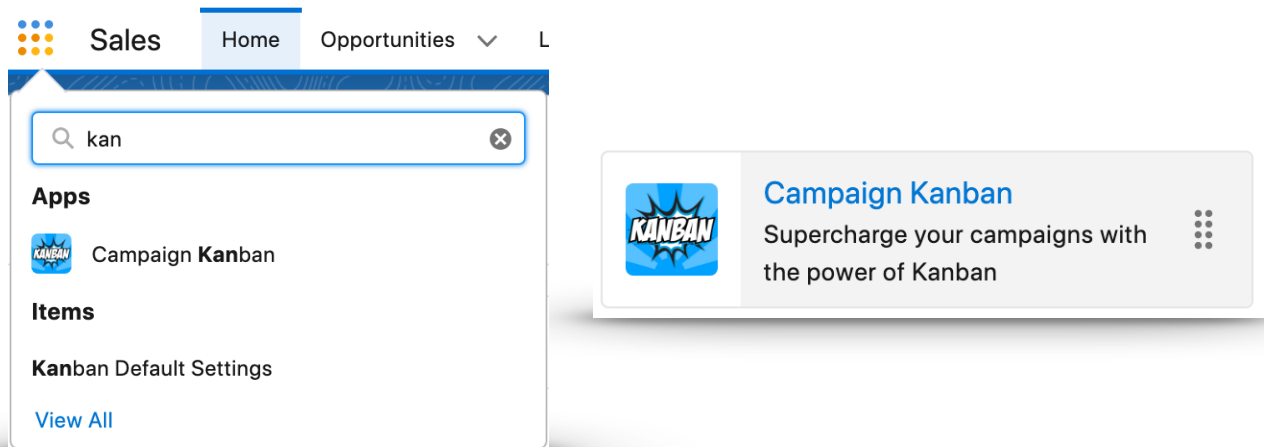


How to setup (for Salesforce Administrators)

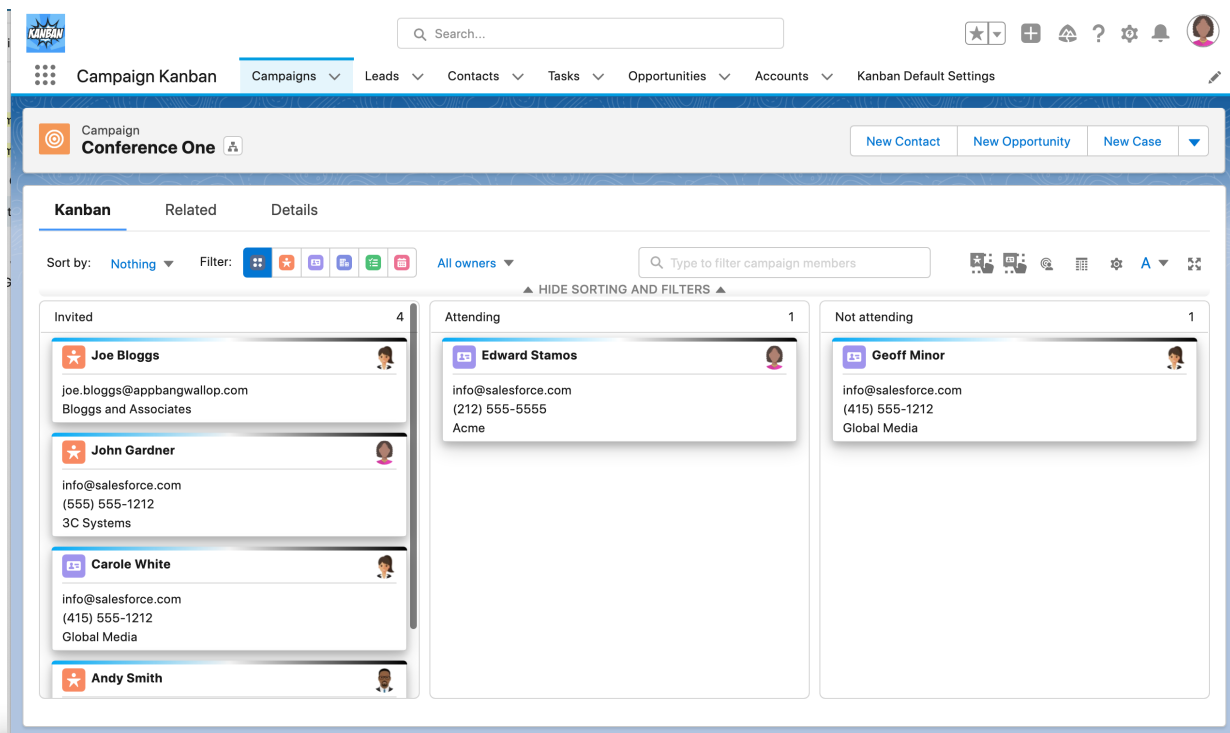
The Campaign Kanban App includes a **lightning** page layout that already has the Campaign Kanban component as the main view of the campaign so you can navigate to a campaign to see how we recommend setting things up. To add the kanban component to an existing campaign lightning page layout, follow the instructions on the next page.

1. Using the Campaign Kanban App

You will need to choose the 'Campaign Kanban' app.



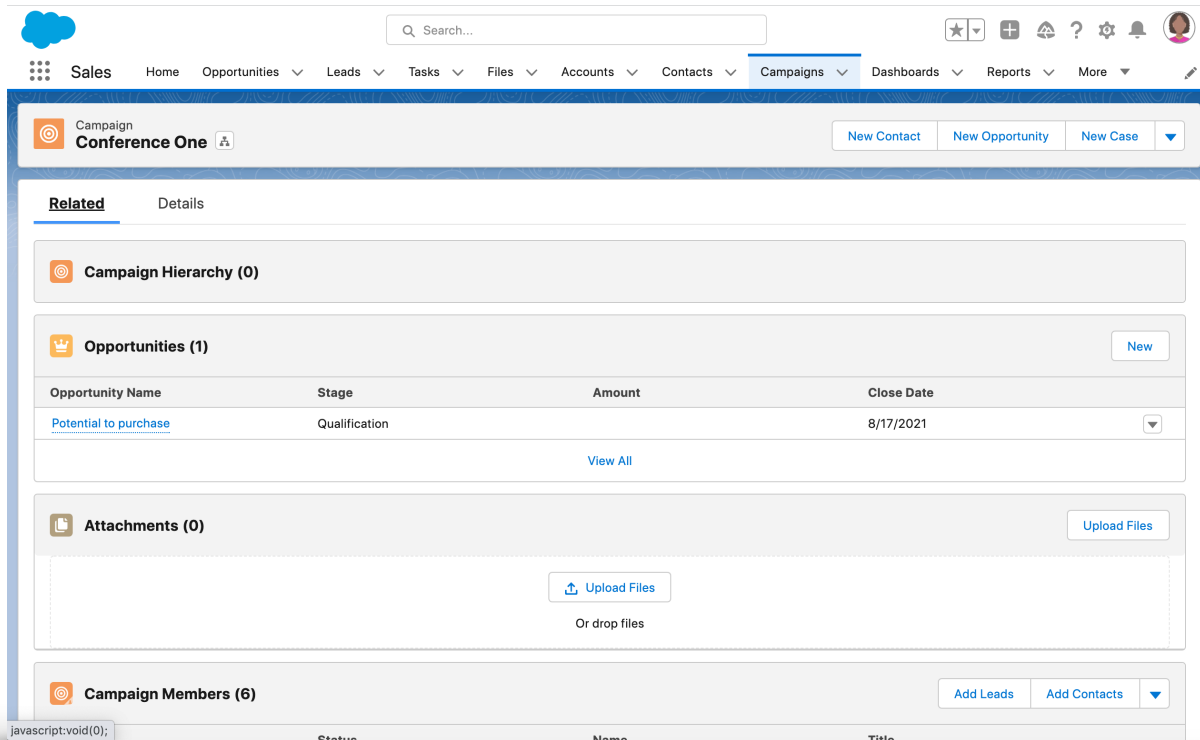
The Campaign Kanban App includes a campaign layout that already has the Campaign Kanban component as the main view of the campaign so you can navigate to a campaign to immediately see the kanban view of the campaign.



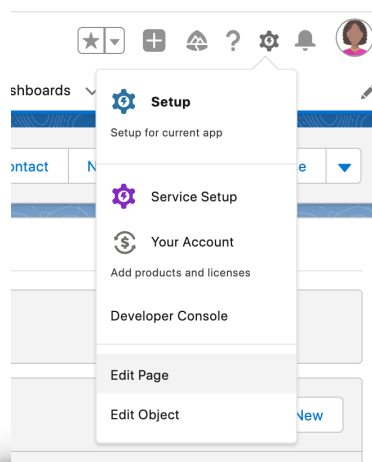


2. Adding the Kanban Component to an existing Campaign Lightning Page Layout

Go into a campaign (it can be any campaign) within your chosen Salesforce app.



Go to 'Setup' and choose 'Edit page' as shown below to edit the campaign page layout:





You will see the Lightning App builder as shown below.

The screenshot shows the Lightning App Builder interface for a 'Campaign Record Page'. The Components panel on the left lists 29 Standard components and 0 Custom components. The main canvas displays a preview of the Campaign Record Page with sections for Campaign Hierarchy, Opportunities, Attachments, Campaign Members, and Campaign Member Statuses. The right sidebar shows the Page configuration with fields for Label, Developer Name, Page Type, Object, Template, and Description.

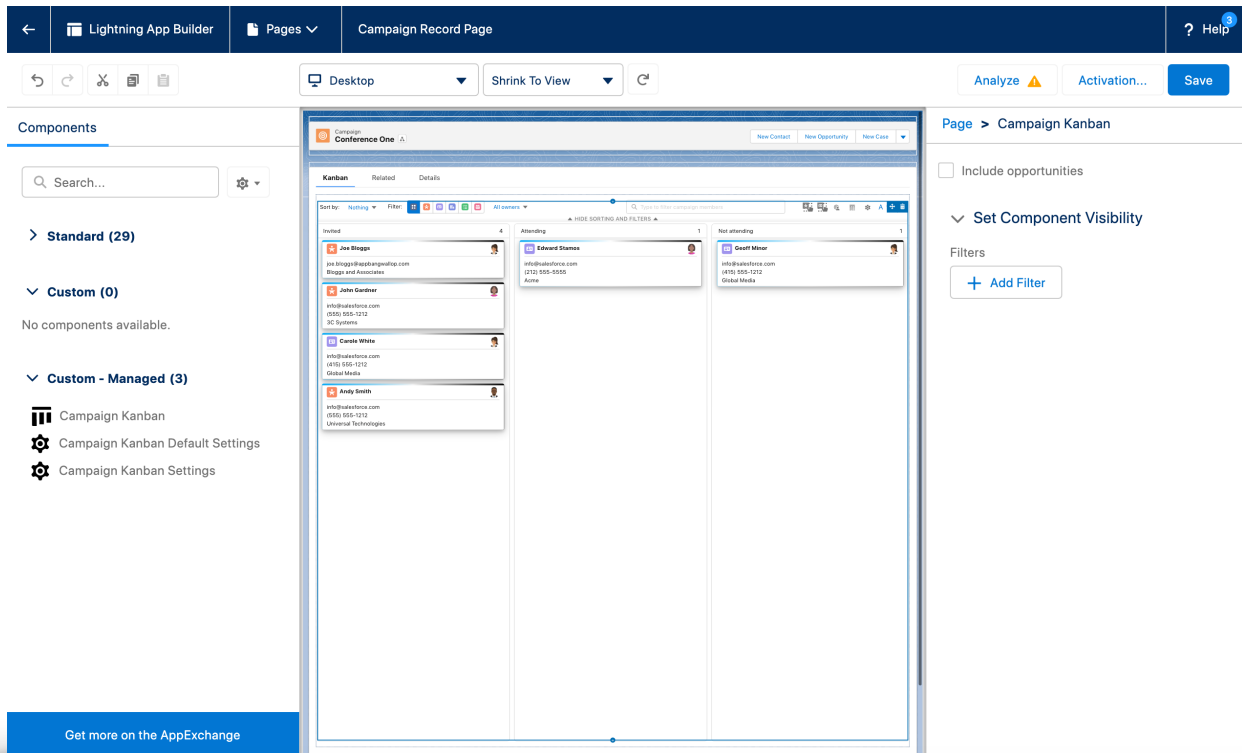
Collapse the 'Standard' list of components or scroll down to see the 'Custom - Managed' components.

The screenshot shows the Lightning App Builder interface for a 'Campaign Record Page'. The Components panel on the left lists 29 Standard components and 3 Custom - Managed components. The main canvas displays a preview of the Campaign Record Page with sections for Campaign Hierarchy, Opportunities, Attachments, Campaign Members, and Campaign Member Statuses. The right sidebar shows the Page configuration with fields for Label, Developer Name, Page Type, Object, Template, and Description.





Drag the 'Campaign Kanban' component into one of the 'Add Component(s) here' sections. You can ignore the 'Campaign Kanban Default Settings' and 'Campaign Kanban Settings' components as they don't need to be added manually to any page.



We recommend using a full width lightning page layout so that the kanban board can use the entire width of the browser.

Note that the Campaign Kanban lightning component will change its height to take up all available space until the bottom of the visible browser window. Therefore it is recommended to position the component near to the top of the page, which will allow the kanban board to be as tall as possible.

If you do not use opportunities within your Salesforce Org untick the 'Include opportunities' checkbox, which means that they will be excluded from the kanban board as well as filter options and the 'create opportunity' quick action in the Details Panel.





Save and activate the lightning page layout and navigate back to your campaign to view the kanban board.

The screenshot shows the Salesforce Campaign Kanban board for 'Conference One'. The interface includes a top navigation bar with tabs for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns (selected), Dashboards, Reports, and More. A search bar is located at the top right. Below the navigation bar, the campaign name 'Conference One' is displayed, along with buttons for 'New Contact', 'New Opportunity', and 'New Case'. The Kanban board is divided into three columns: 'Invited' (4 members), 'Attending' (1 member), and 'Not attending' (1 member). Each member card displays their name, profile picture, email address, phone number, and company name.

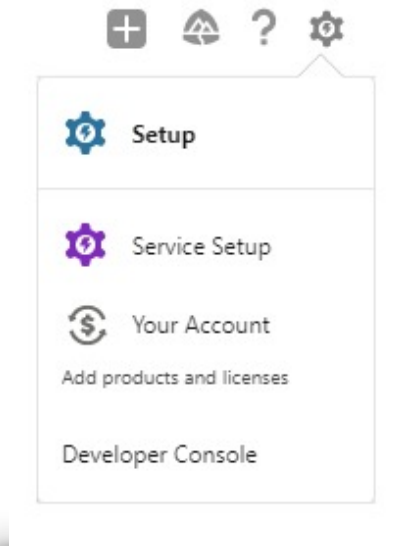
Invited	Attending	Not attending
Joe Bloggs joe.bloggs@appbangwallop.com Bloggs and Associates	Edward Stamos info@salesforce.com (212) 555-5555 Acme	Geoff Minor info@salesforce.com (415) 555-1212 Global Media
John Gardner info@salesforce.com (555) 555-1212 3C Systems		
Carole White info@salesforce.com (415) 555-1212 Global Media		
Andy Smith		





3. Allocating Licenses to Salesforce users

To allocate Campaign Kanban licences first go to setup



Then type and select "Installed Packages" in the Setup quick find box and choose "Manage Licences" next to the Campaign Kanban Managed Package

Installed Packages

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your Salesforce.com environment. [Learn More about Installed Packages](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click Uninstall. To manage your package licenses, click Manage Licenses.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Enabled for Platform Integrations	Expiration Date	Install Date	Limits	Apps	Tabs	Objects	AppExchange Read
Uninstall Manage Licenses	Campaign Kanban	App Bang Wallop	1.45	abw_ek	Active	10	2	☐	Does not Expire	22/03/2022, 15:00	☐	1	1	1	Passed

Description: Supercharge your campaigns with the power of Kanban!





From the Package Manager choose "Add Users"

Package Manager

Campaign Kanban

Package Details

Package Name: Campaign Kanban

Status: Active

Expiration Date: Does not Expire

Publisher: App Bang Wallop

Allowed Licenses: 10

Used Licenses: 0

Enable for Platform Integrations

Enable for Platform Integrations

Licensed Users

Add Users Remove Multiple Users

Full Name	Role	Active	Profile
No records to display			

Select user(s) to assign a licence to and click add and you're done.

Package Manager

Add Users

Campaign Kanban

View: All Create New View

Available Users

Select Show Deselect Show Deselect All Add All Users

Action	Full Name	Role	Active	Profile
☒	User, Admin	System Administrator	☐	

Selected Users

Action	Full Name
☒	User, Admin

Add Cancel





4. Permission Sets

There are 3 permission sets bundled within Campaign Kanban that allow users to easily have all permissions necessary to get the most out of Campaign Kanban

- **Campaign Kanban Administrator** - Full access to the campaign kanban board allowing users to see kanban cards, view details, move campaign members in and out of the campaign, modify campaign settings and modify default settings.
- **Kanban Manager** - Access to the campaign kanban board allowing to see kanban cards and view details as well as customise settings for a particular campaign.
- **Campaign Kanban User** - Minimum access to the campaign kanban board allowing users to see kanban cards and view details.

Note that in order to use Campaign Kanban users will also need read only access to the standard objects Opportunities, Tasks and Events. In order to use some of the quick actions (Create Opportunity, Create new Task, Log a Call), users will also need create access for these standard objects.

- **Log a call** - create Task permission
- **Create a Task** - create Task permission
- **Create new Event** - create Event permission
- **Create Opportunity** - create Opportunity permission

If a user does not have read permission for tasks or events they will still be able to use Campaign Kanban albeit without seeing tasks and/or events.





Support

For support or enquires please contact kanban.support@appbangwallop.com.

Thank you for choosing Campaign Kanban!

