KANBAN FOR NETSUITE INSTALLATION GUIDE

1. **Install the PDF-ExpressEditor (Report 360) bundle**
    1. Log in to NetSuite as Administrator
    2. Navigate to Customization → SuiteBundler → Search & Install Bundles
    3. Enter "106006" in the KEYWORDS field and click on Search
        (this is the bundle id for PDF-Express Editor)
    4. Click on "PDF-ExpressEditor" (the Name field)
    5. Click on the "Install" button and answer "OK" in the popup window to proceed.
    6. Click on "Install bundle"-button
    7. Answer "OK" to the question "Are you sure?" to start the installation

Please Note: *Make sure the bundle is fully installed before proceeding to step 2 (Install the PDF-ExpressEditor Prebuilt bundle).*

2. **Install the PDF-Express Editor Prebuilt bundle**
    1. Repeat the steps above for bundle "120140" to install Prebuilt reports.

Please Note: *Make sure the bundle is fully installed before proceeding to step 3 (Install the Kanban for Netsuite bundle).*

3. **Install the Kanban for NetSuite bundle**
    1. Repeat the steps above for bundle "163252"

After Installation:
1. Assign the "Kanban Process Administrator" role to your selected users (be aware that this is an Admin role and has full access to many standard records and features)
2. Using "Kanban Process Administrator" role, navigate to Administration → Kanban Users → New
3. Grant access to Kanban for NetSuite to your selected users by adding them to the list.
4. Grant access to use *Kanban for NetSuite* for selected NetSuite roles by (the *Move to Production* section in the *User Guide – Kanban for NetSuite* provides step-by-step instructions).

Please refer to *User Guide – Kanban for NetSuite* and *User Guide – Prebuilt Kanbans* for information on how to use it.

Also note that the prebuilt Kanban boards are configured with NetSuite standard status values. Therefore, it is **important** that the prerequisites listed for each prebuilt Kanban in the *User Guide – Prebuilt Kanbans* are fulfilled for the Kanban boards to function properly. The user guides can be found in the menu tab *Online Help* with the *Kanban Process Administrator* role.