1. [Leads & Opportunities for Lightning Experience]
2. [Visualize Success with Path and Kanban]

Visualize Success with Path and Kanban

Learning Objectives

After completing this unit, you'll be able to:

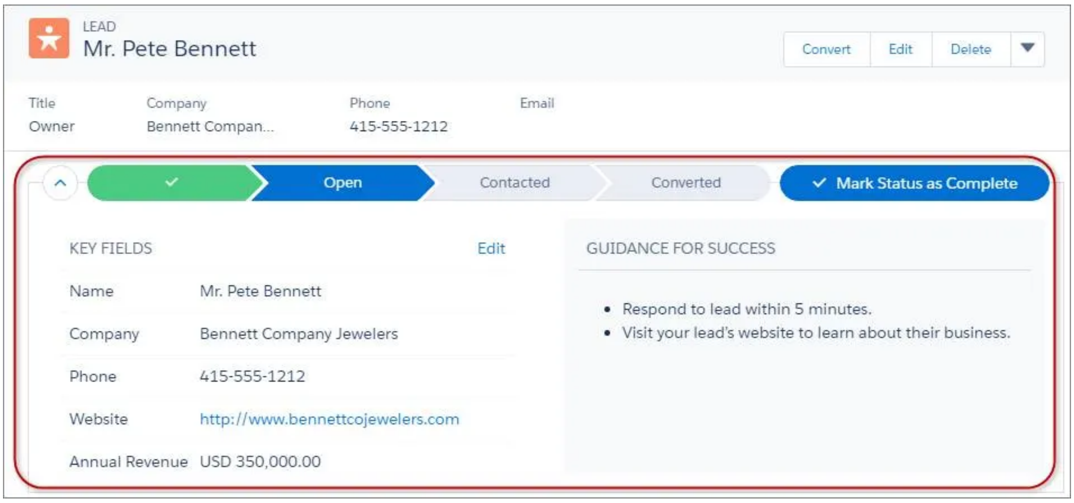
- Update a record's stage or status using Path.
- Update records in the Kanban view.
- Use filters and view charts in the Kanban view.

Lightning Experience is designed to give you more options and help you work faster than ever. In this unit, we explore how the Path and the Kanban view can help you track, manage, and update your records.

Track a Deal with Path

Path is a simple tool with some powerful features. You may have already noticed it on lead and opportunity records as you worked through the other units in this module.

Path shows you at a glance where the record is in your sales process. It's a quick indicator that helps you visualize where you are and where you're going.



Key Fields highlight the information you need the most when you open a record, so you don't have to switch tabs or scroll around to find critical data.

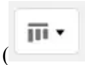
If you're new to your job or the company, Guidance for Success (provided at each step on a Path) can help you come up to speed quickly and make sure you don't miss any critical activities.

Use the Path to update the record's status by clicking **Mark Status as Complete** to move the record to the next step on the path. It's easy to select a different status if your deal loses steam and you need to retreat back to a previous status, or moves so fast you need to skip ahead. Click the step on the path you're moving to, then click **Mark Current Status**.

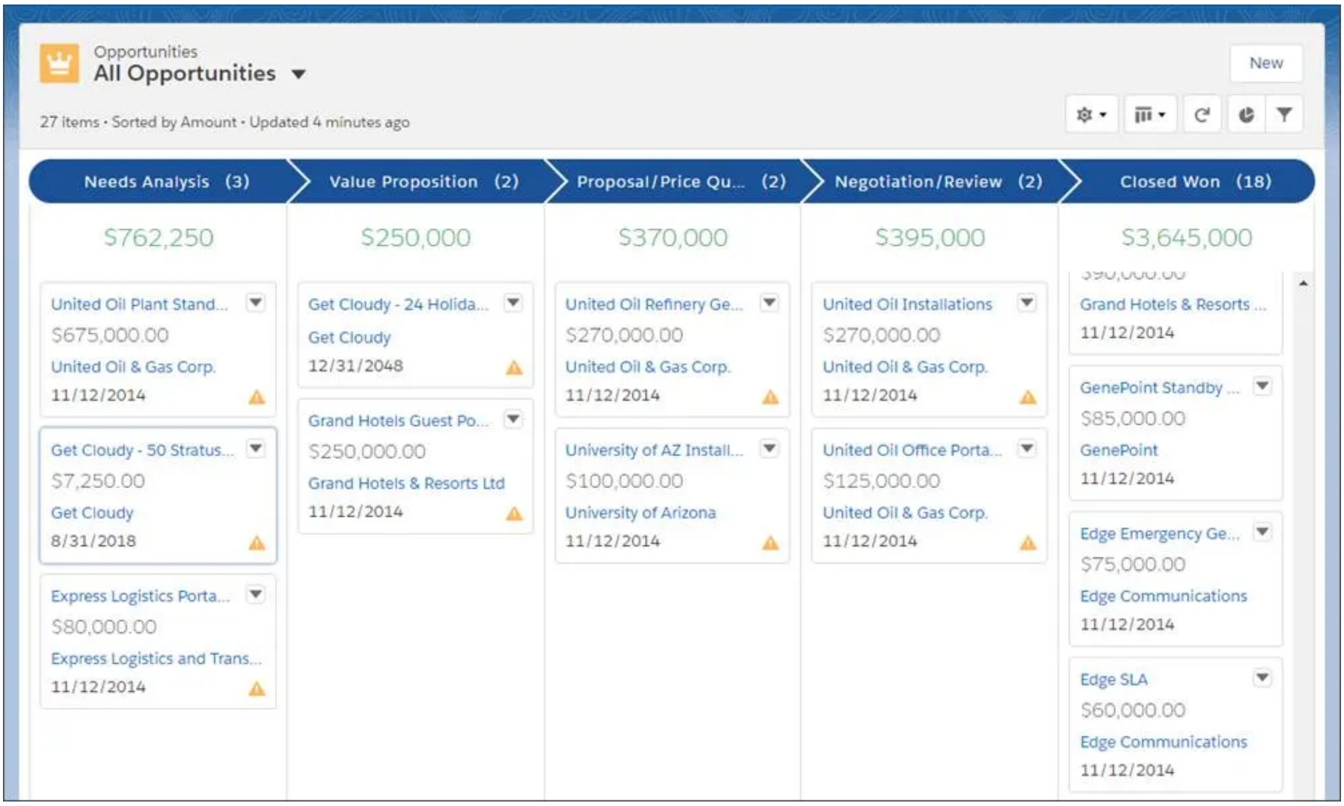
Manage Records in the Kanban View

The Kanban view is a visual summary of the records in a list view. It gives you a big picture view of all your work and lets you easily sort, summarize, filter, and move your opportunities along your pipeline. You can use the Kanban view as a workspace. Let's check out the Kanban view for opportunities.

1. Select the **Opportunities** tab.
2. Select the **All Opportunities** list view.

3. From the **Display As** menu (), select Kanban.

We've picked the **All Opportunities** list view because it gives us the most data to work with in this unit, but you can view the Kanban view on almost any list view.



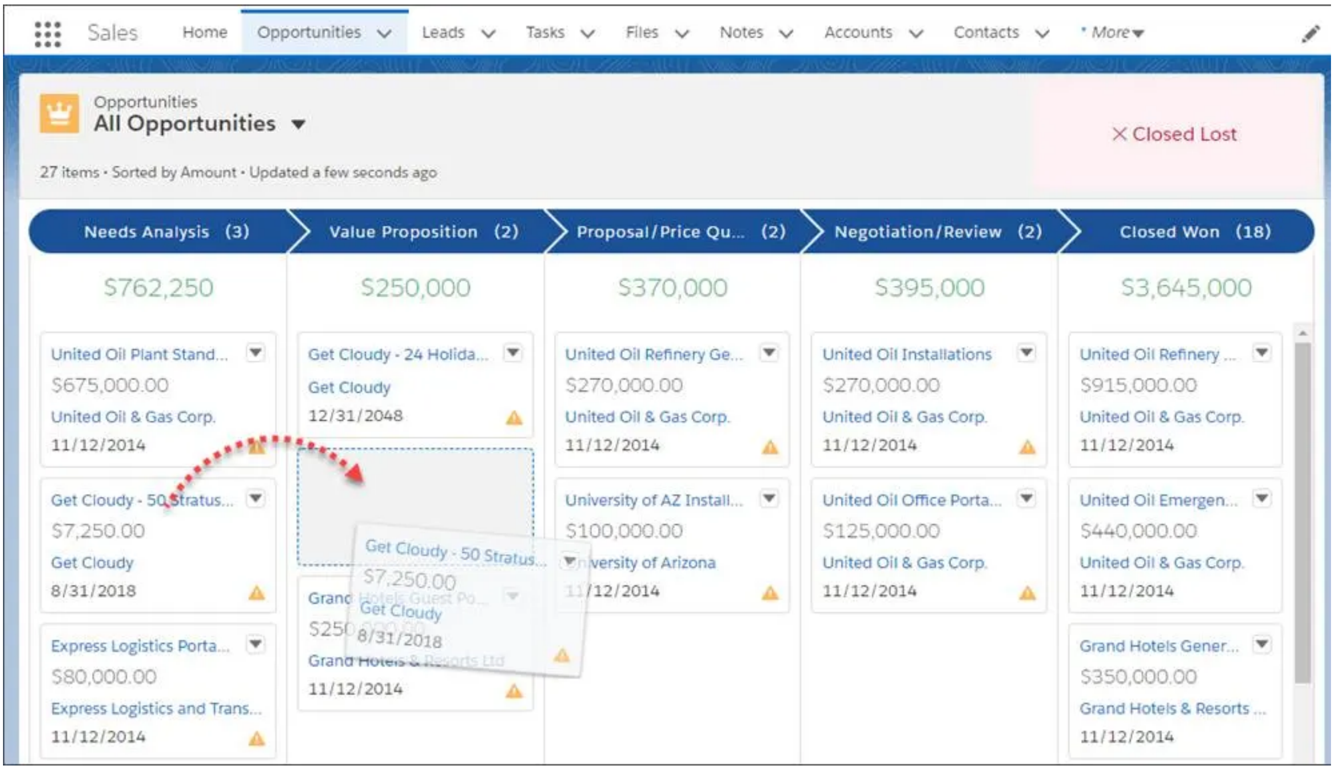
The Kanban view looks simple, but don't be fooled. It's a powerful tool that helps you manage your work efficiently. Let's see what you can do.

Move an Opportunity to the Next Stage

By default, the Kanban for opportunities is organized by **Stage**. Each column represents one stage.

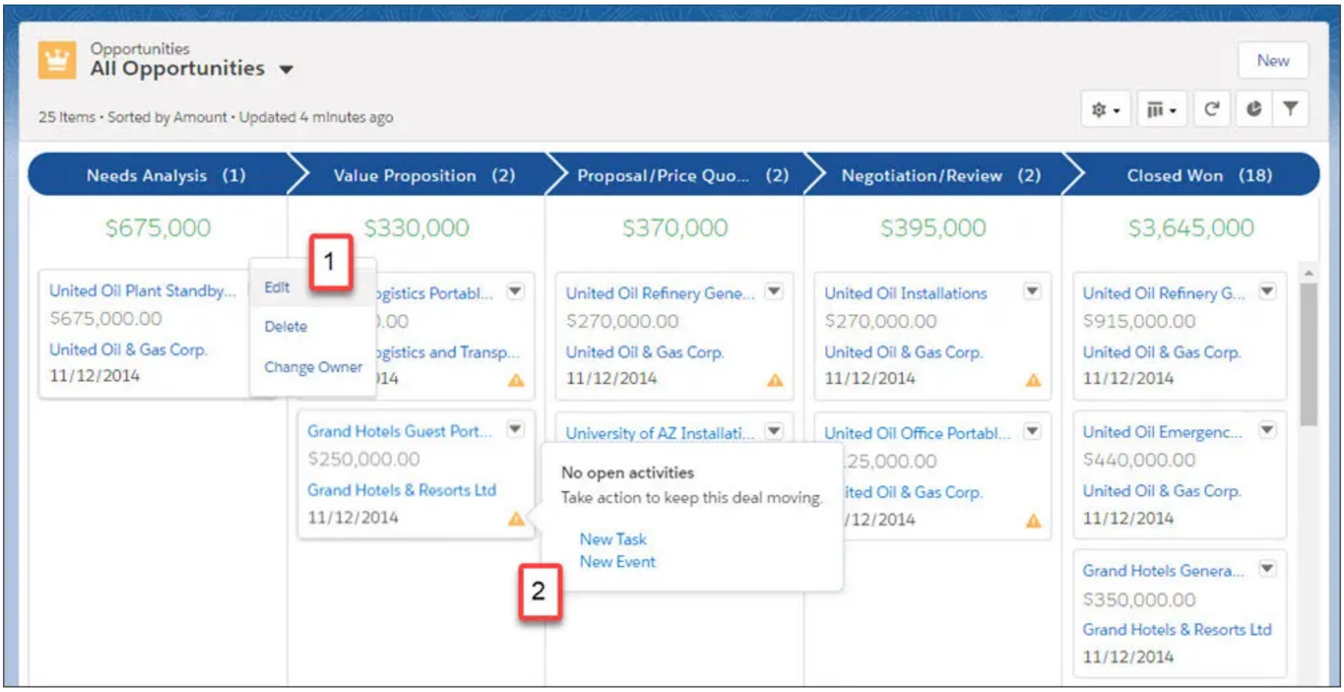
Here's how easy it is to move an opportunity to the next stage in this view.

1. Click any deal in the column on the left.
2. While holding down the mouse, drag the deal's card into a different column.
3. Release the mouse button.



BOOM, done.

Take Action on Your Records



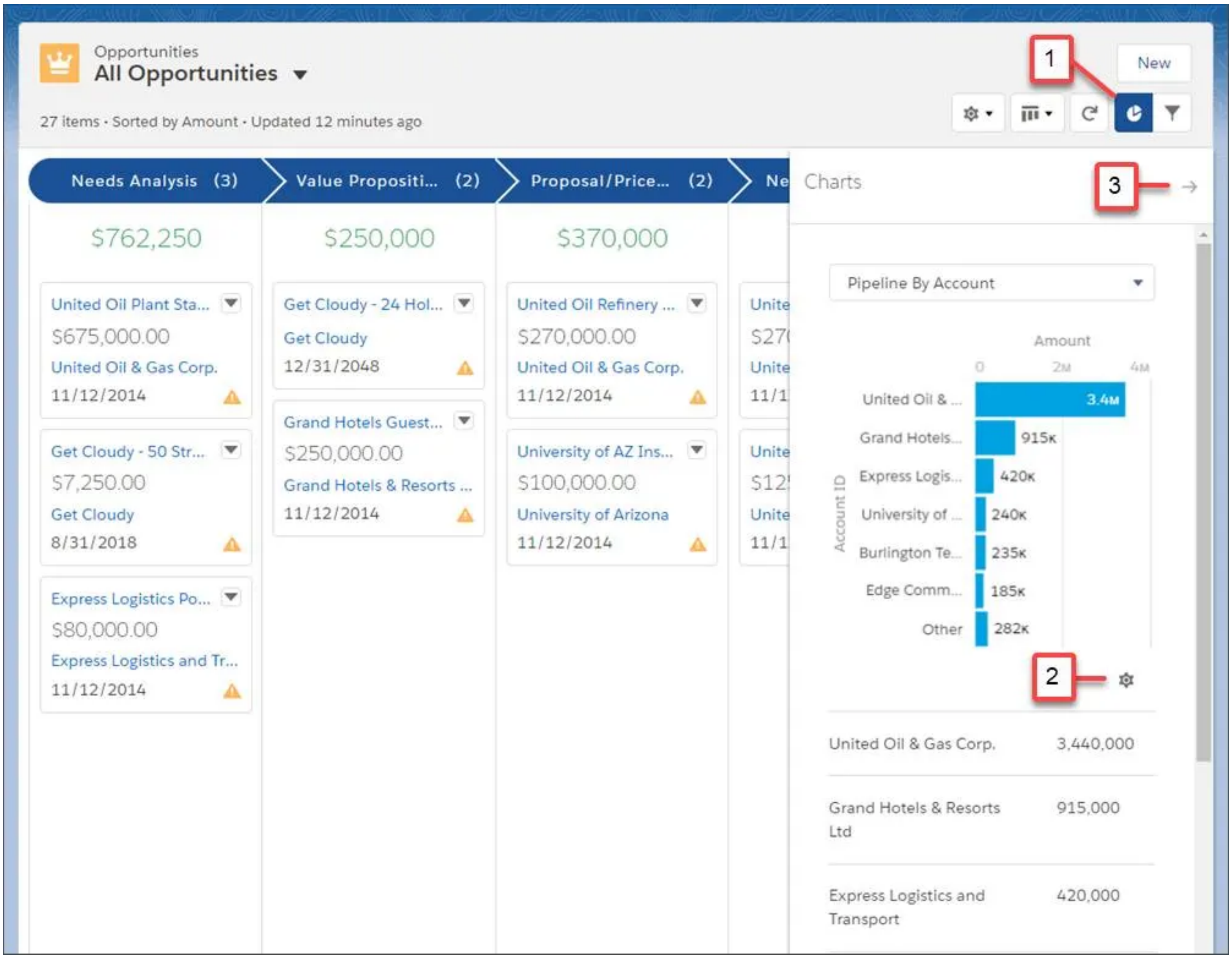
If you need to make other changes, you can do that, too. Just click the down arrow on a Kanban card, and select **Edit** (1). Make whatever change you need in the record right within the Kanban view.

You can also delete a record or change the opportunity's owner.

If an opportunity doesn't have any upcoming tasks or events, the Kanban card shows a warning symbol (2) to let you know that you might need to set an activity so your deal doesn't stall out.

View a Chart

Click **Show charts** (1) and you see a chart or graph that summarizes the data in your list view in different ways. For example, if you select **Pipeline by Account**, you can quickly see which account you've done the most business with. Or, select **Pipeline by Stage** to discover in a glance which stages your deals are in. Hover the mouse over a section of the chart for more details, or look below it.



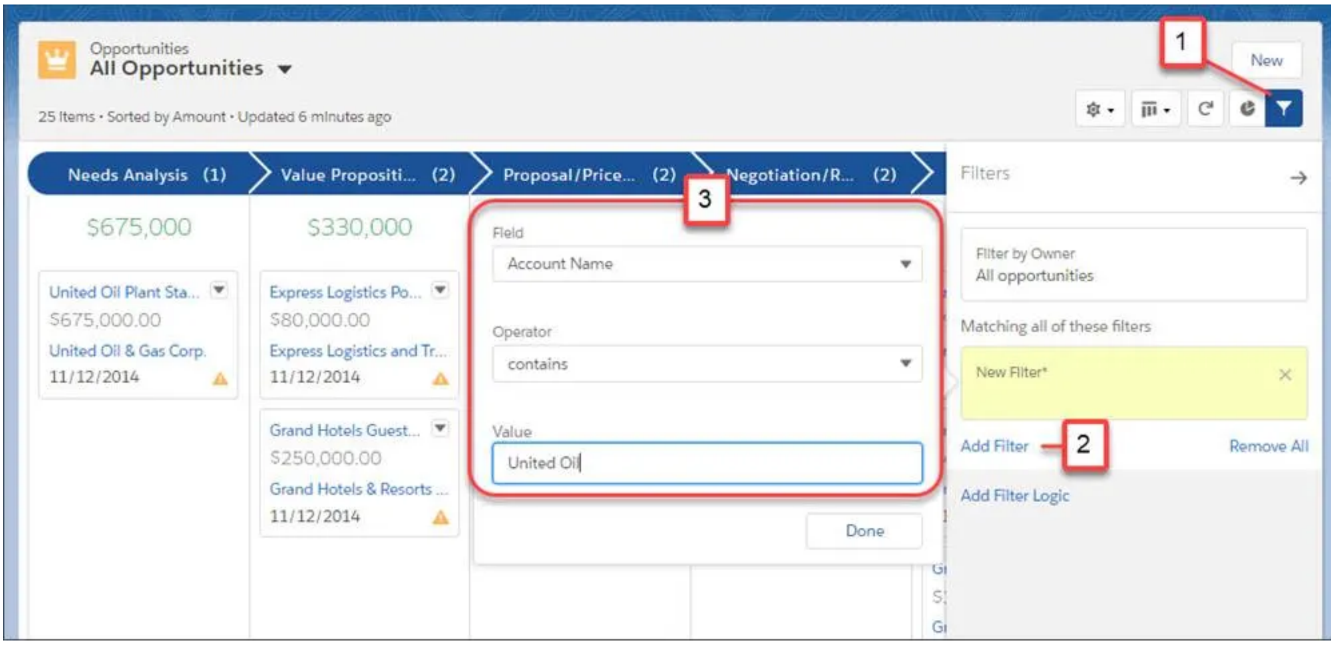
Want to see your **Pipeline by Stage** chart as a bar chart instead of a donut chart? Click **Settings** (2) and select a different type of chart.

When you're done reviewing your charts, click the **right** arrow (3) to close the Chart sidebar, or click **Show charts** (1) again.

Filter the Kanban View

When business is booming, you may want to narrow down your records to see just a subset of your records. Filters are an easy way to quickly and temporarily reduce the records in your list view to just the ones you're looking for.

1. Click **Show filters**.
2. Click **Add Filter**.
3. Add the filter:
    a. Field: `Account Name`
    b. Operator: `contains`
    c. Value: `United Oil`



4. Click **Done**.
5. Click **Save**.
6. To hide the filter settings, click the right arrow.

Now your Kanban view shows just a couple records: deals you've done with the United Oil Plant Standby Generators account.

You can use the filters to sort your records in multiple ways. For example, you could find deals created after a certain date, or deals whose **Last Activity** date was in the distant past.

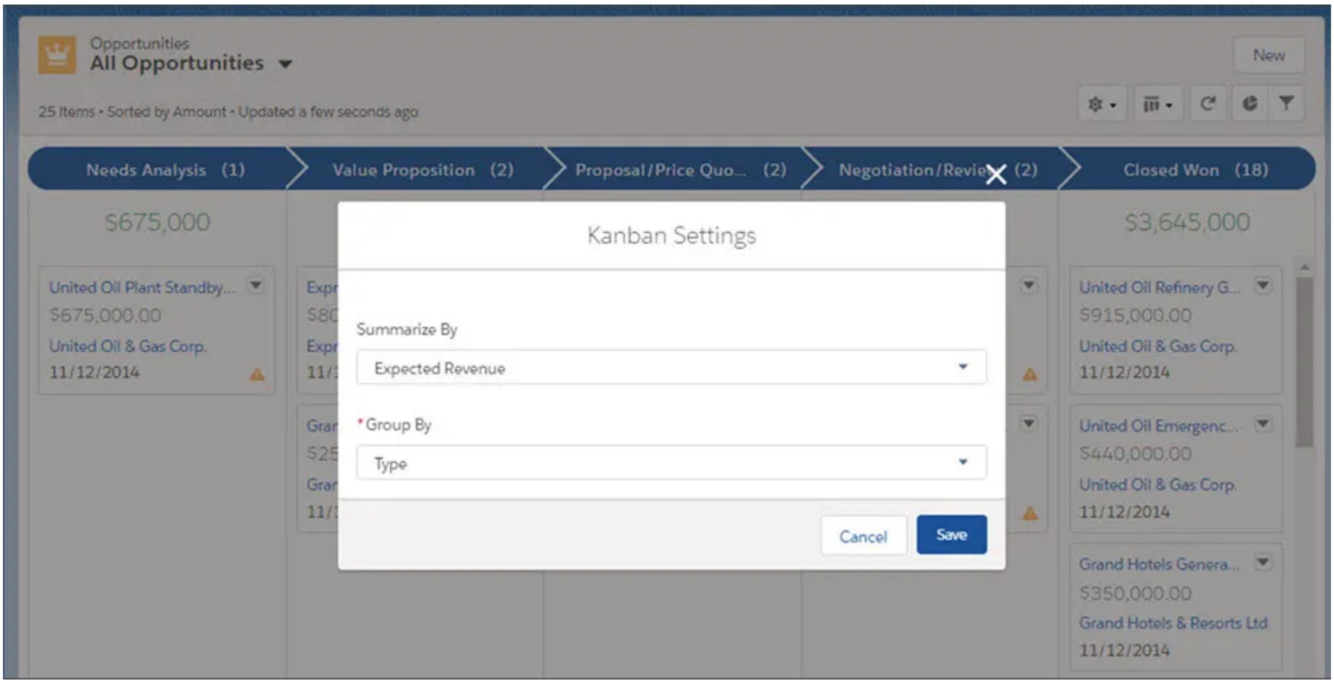
Whatever options you use to filter your records, don't forget to disable the filter when you're done. To disable the filter, click **Remove All**, then click **Save**.

Change Up the Kanban View

You probably thought you'd learned everything there was to discover about the Kanban view. After all, it looks so simple. But the Kanban view is a powerful tool, and there are a few more ways you can use it to view your records.

By default, the Kanban view for opportunities organizes your records into columns by **Stage**, and shows a summary of the deals in each column based on the sum of the **Amounts** of each column's opportunities. But you can change both what columns records are organized into, and what number is used in the summary.

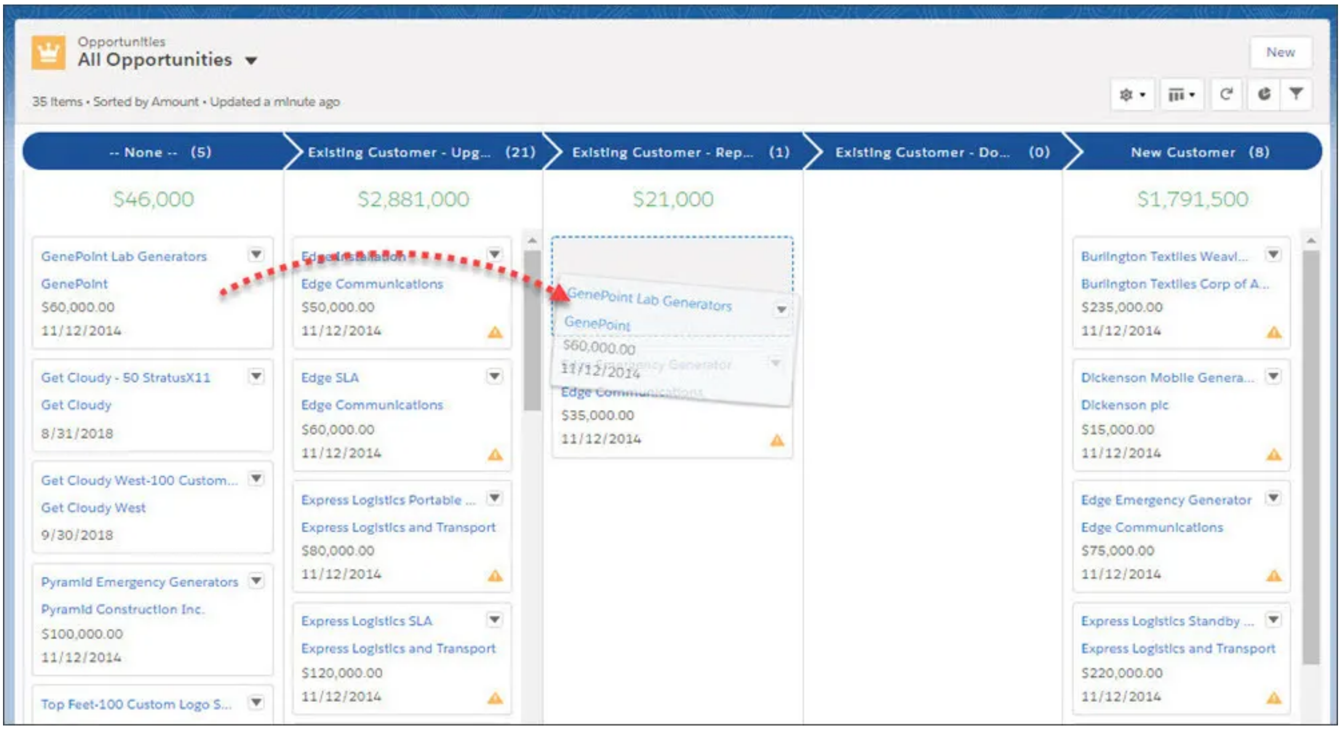
1. Click **List View Controls** ( ) and select **Kanban Settings**.
2. Change **Summarize By** to **Expected Revenue**.
3. Change **Group By** to **Type**.



4. Click **Save**.

When the Kanban view reloads, it shows your opportunities organized into columns based on the opportunity's **Type**. The summary at the top of each column is the sum of **Expected Revenue** for each **Type**.

Uh oh, it looks like somebody forgot to select a **Type** for a couple of our records. You could click the **down** arrow and select **Edit** to view the full record and update the **Type** field. But if that's all you need to change, you can update the records' **Type** more quickly by dragging them to a new **Type** column.



Wrapping it All Up

Tracking, managing, and updating your records is easier than ever with Path and Kanban. The Kanban view is available to all Salesforce users for most objects, including leads, tasks, and more. Path needs to be enabled and configured by your Salesforce admin.

Resources

- [Display a Visual Summary with Kanban](#) (Salesforce help)

Quiz Complete!

+100 points

Leads & Opportunities for Lightning Experience
100%
Progress: 100%
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