

Kanban boards, recurring documents and bulk tools

Tools and productivity

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Organise work visually, repeat documents automatically and update many records at once.

Intermediate · About 25 minutes · Version 1.0 · Updated 17 November 2026

Overview

Three tools save time once you know them: **Kanban boards** to see work as cards in columns, **Auto Repeat** to create documents on a schedule, and **bulk update** to change many records together.

Steps

Kanban boards

1. Open a list, such as **Issue** or **Task**, and switch the view to **Kanban** from the **View** menu.
2. Click **New Kanban Board**, name it and choose the field that makes the columns, such as **Status**.
3. Drag a card to another column to change its status.

Auto Repeat

1. Open a submitted document you want to repeat, such as a monthly rent invoice.
2. Click **Actions > Repeat** (or search for **Auto Repeat**).
3. Choose the **Frequency** (*Weekly*, *Monthly*, *Quarterly* or *Yearly*), the **Start Date**, and an optional **End Date**.
4. Add recipients to email each new copy.
5. Save. A new document is created on each date.

Bulk update

1. In any list, tick several records.
2. Click **Actions > Edit**, choose the field and the new value, then click **Update**.
3. Use **Actions > Assign To** or **Add Tags** the same way.

Practical example

A landlord customer is billed KES 45,000 on the first of every month. The invoice is set to repeat monthly. A shop manager ticks 30 items and bulk-updates their **Item Group** after a reorganisation.

Important notes

- Check a bulk edit on two or three records first. Some changes cannot be undone.
- Auto-repeated invoices are created as submitted or draft, depending on your setting. Review the first one.
- You cannot bulk-edit submitted documents.

Common mistakes

- Setting Auto Repeat on the wrong document, which sends customers duplicate invoices.
- Selecting all records instead of a few.

Next steps

Return to Tools overview.

Related documentation

- List views and form views
- Filtering, sorting and exporting records
- To Do, assignments and mentions