



Kanban Board



White Paper

Kanban Board - White Paper

Aim:

Kanban Board is an ISV productivity app that enables organized card-based view of Entity records in home grid. Records are systematically arranged in movable cards below each list based on different criteria. This helps to search and filter records quickly as per business requirement.

Features:

- Kanban Board presents the selected View in a Kanban view for quick access and easy understanding and classification of the data in the view.
- Supports moving the records around from one lane to another with a quick drag and drop action.
- Quick access to important information in a compact card view.
- Define quick activity actions for the records.
- Works in context of the native CRM environment and responds to all native ribbon actions available for traditional views.
- Support for search through native quick search available for views in CRM.
- Records in the lanes can be sorted. It also supports filtering of the data in the view by "CreatedOn" date.

Supported Versions

Versions: Microsoft Dynamics 365 v9.x and above.

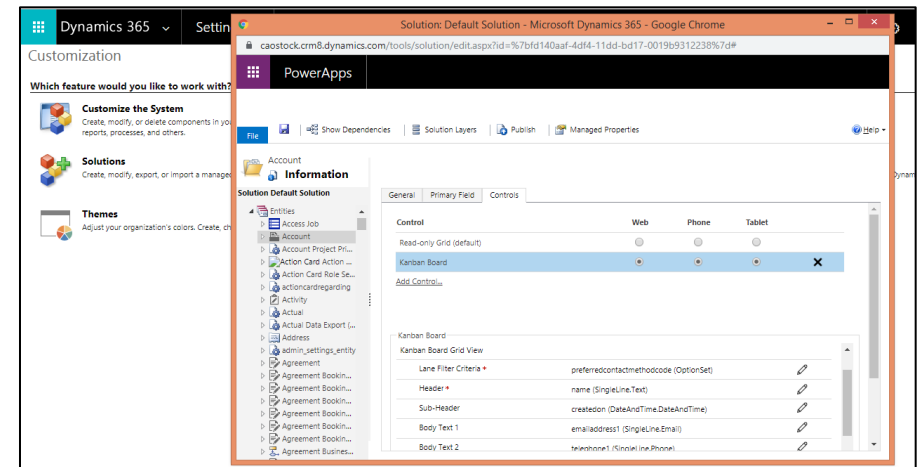
Deployment Models: Dynamics 365 Online.

Who needs it?

Kanban Board is developed to provide you an organized and systematic view of Entity records in multiple lanes consisting of multiple cards (records). You can further drag and drop records from one lane to another and perform quick actions like Email, Phone Call, Appointment, etc. Finding records easily and filtering them on basis of date saves time and improves efficiency. Thus, with Kanban Board you can provide enhanced view of records and increase productivity of Dynamics 365 CRM users.

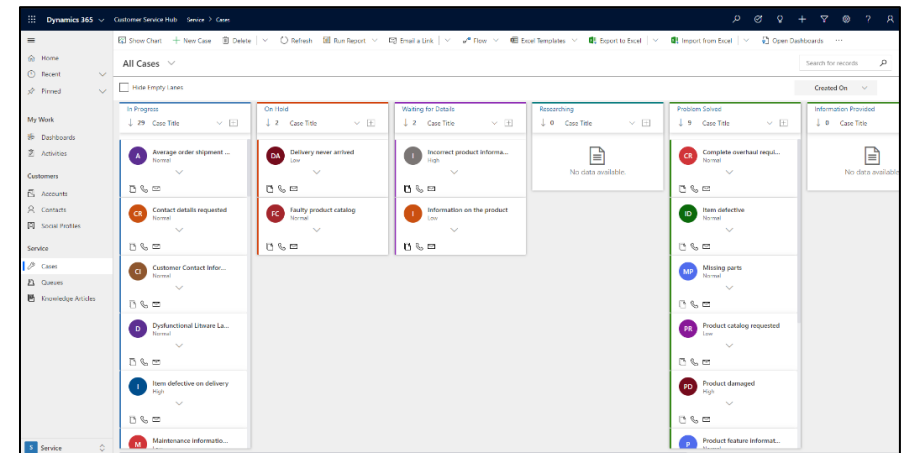
Controls

Setup Kanban Board controls for respective Entities.



Organized Kanban View

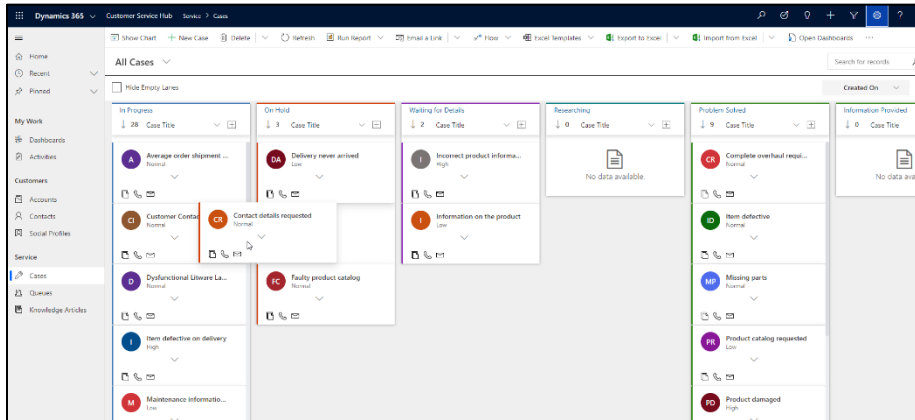
Visualize any CRM View as lanes as in a Kanban View. Ability to configure the fields for defining the categories.



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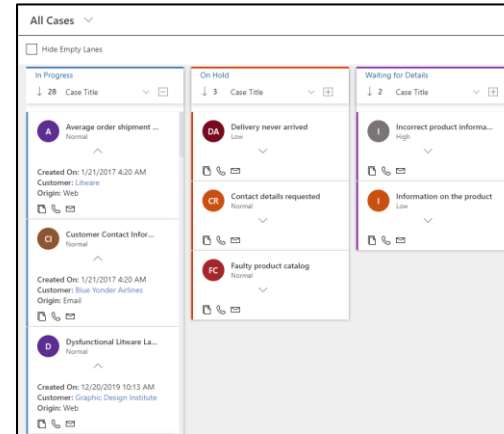
Drag and Drop Cards

Ability to drag and drop the cards across columns to quickly update the values of the underlying category field.



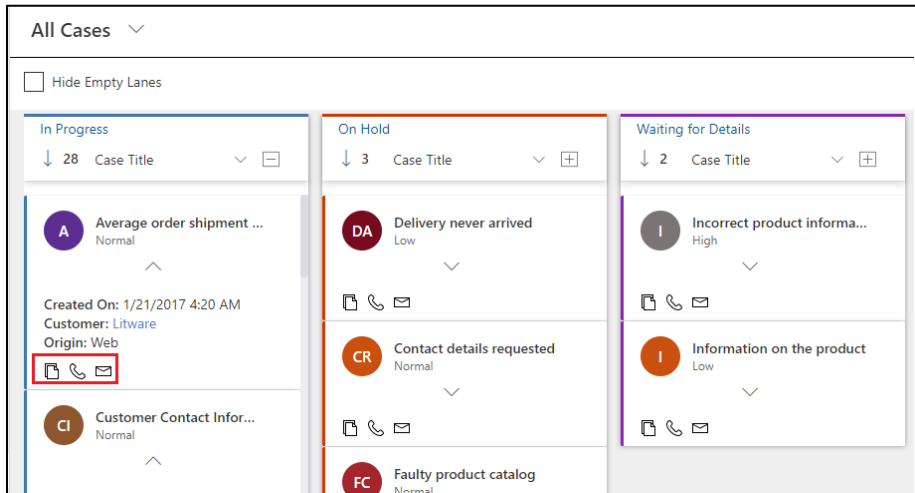
Compact Card View

The records in the Kanban View are represented as compact cards.



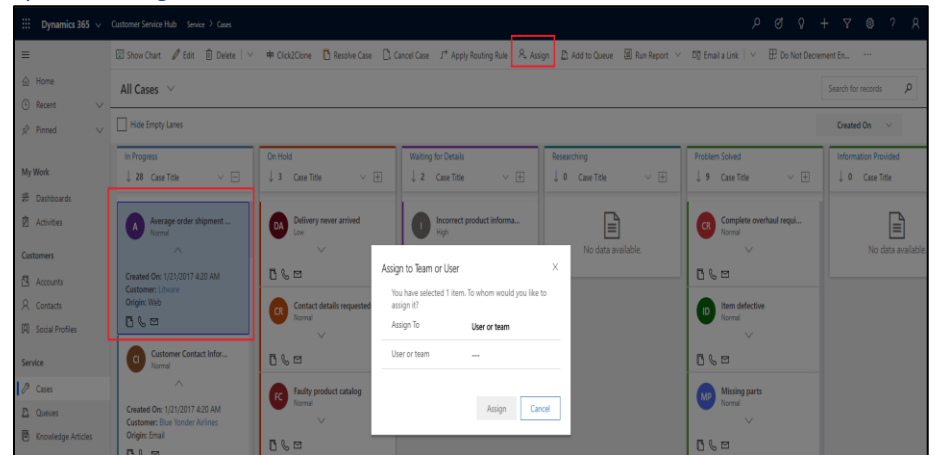
Create Quick Activity Actions

Support to define quick activity actions for the records like Phone Call, Appointment and Task.



Responsive to all native ribbon actions

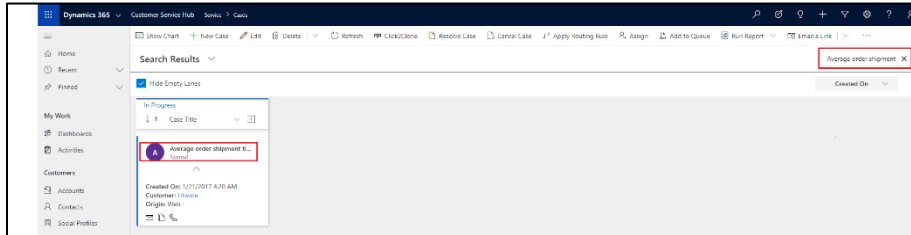
The component is context-aware which means that you are allowed to perform any action from the ribbon bar by selecting the cards as you would in the traditional view upon selecting a record.



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Support for search available for Views

Being a Power Apps Component that replaces the OOB grid components of the view, results of the quick search is reflected in the Kanban view as well.



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Sort Cards

Records in the lanes can be sorted. It also supports filtering of the data in the view by "CreatedOn" date.

