

# Kanban Board



## User Manual

**Content**

Introduction ..... 3

Security Roles..... 3

Kanban Board Configuration..... 3

Configuration for Specific View..... 13

Kanban Board Features..... 18

Contact Us..... 25

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## Introduction

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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.

### **Salient Features:**

- Visualize views on board with multiple lists consisting multiple cards (records)
- Configure lists based on any field type subject to a given entity
- Configure card content
- Drag and Drop cards (records) from one list to another
- Search and filter records easily
- Perform actions on selected cards (records)
- Show/Hide empty lists
- Filter records based on Date
- Sort list in ascending/descending order based on attributes that are part of card content

**Available for:** Microsoft Dynamics 365 v9.x and above.

**Deployment:** Dynamics 365 Online.

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## Security Roles

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There is no specific security roles for Kanban Board.

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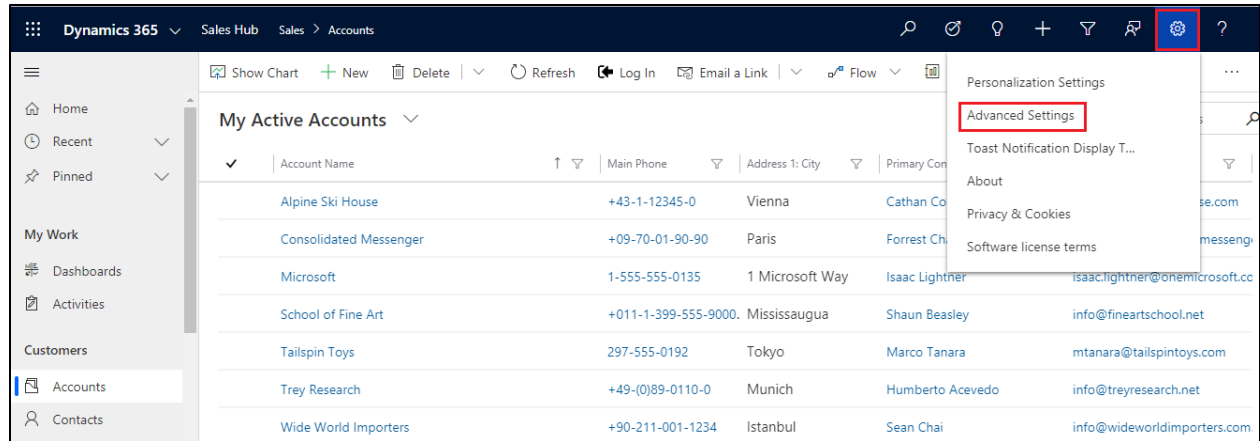
## Kanban Board Configuration

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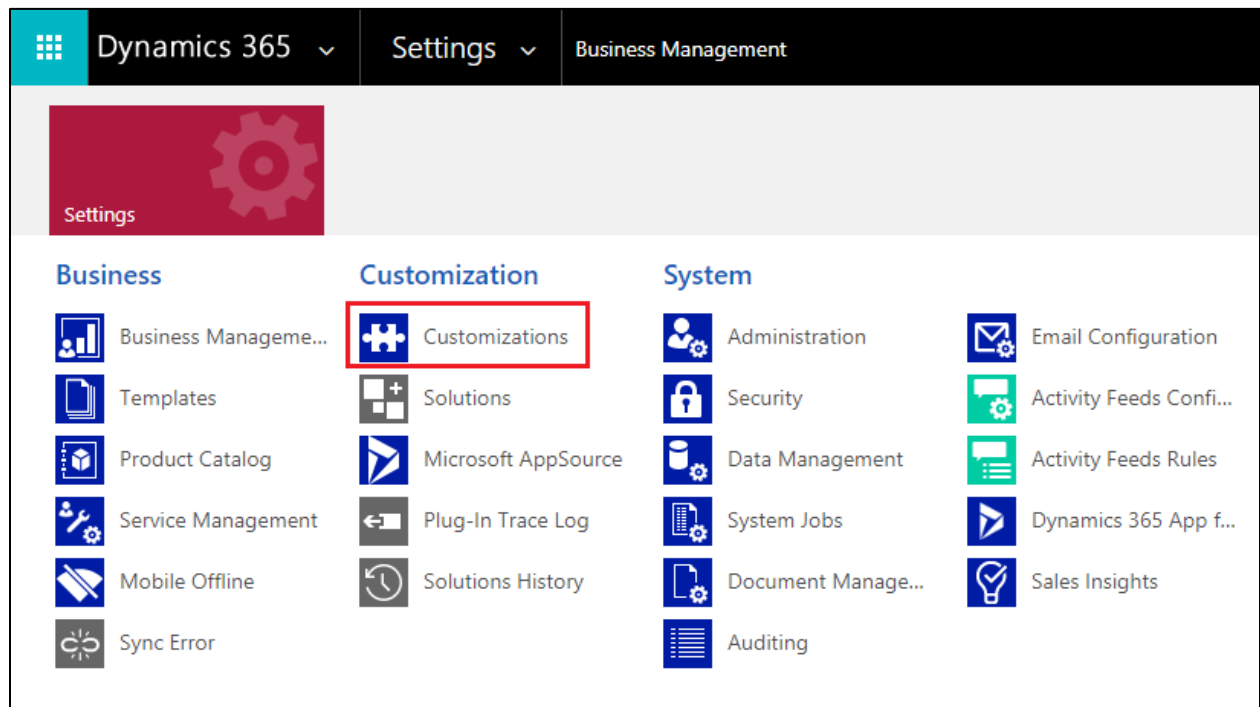
Kanban Board configuration is quite easy and simple. In this document we will see how to configure Kanban Board Control in your Dynamics 365 for Case Entity.

- 1) Click on gear icon at top right → Select Advanced settings.

## Kanban Board – User Manual

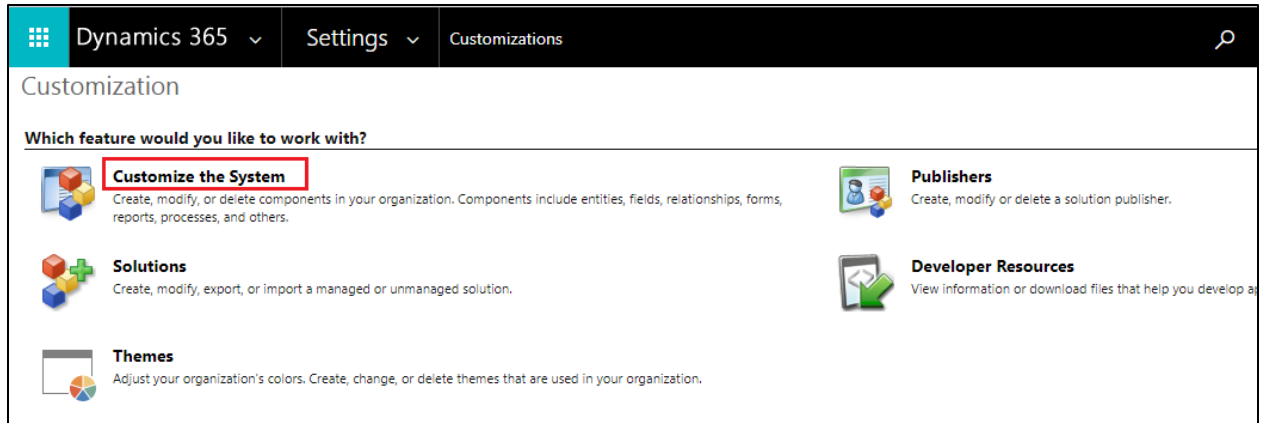


2) Then go to Settings → Customizations.

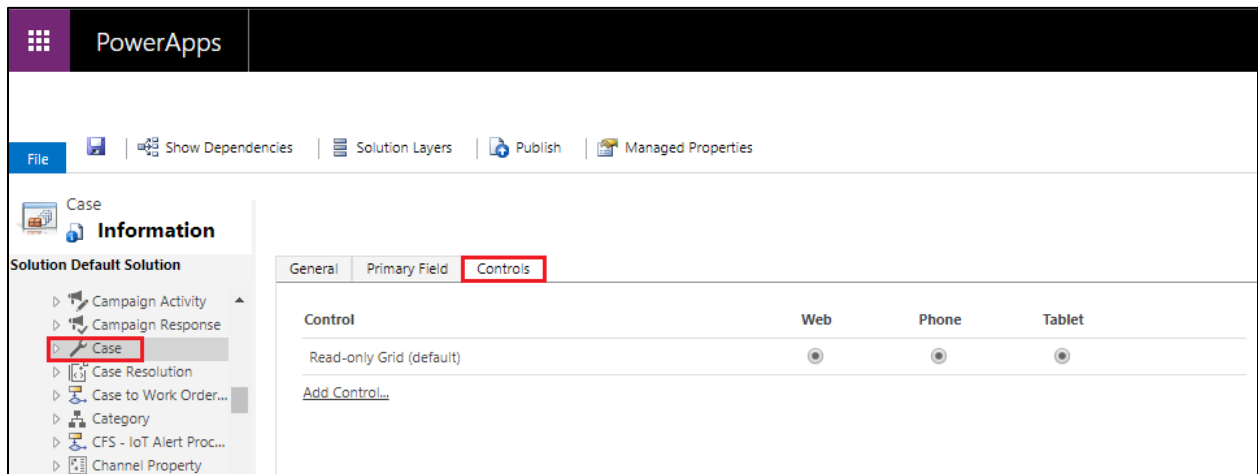


3) Next click on **Customize the System**.

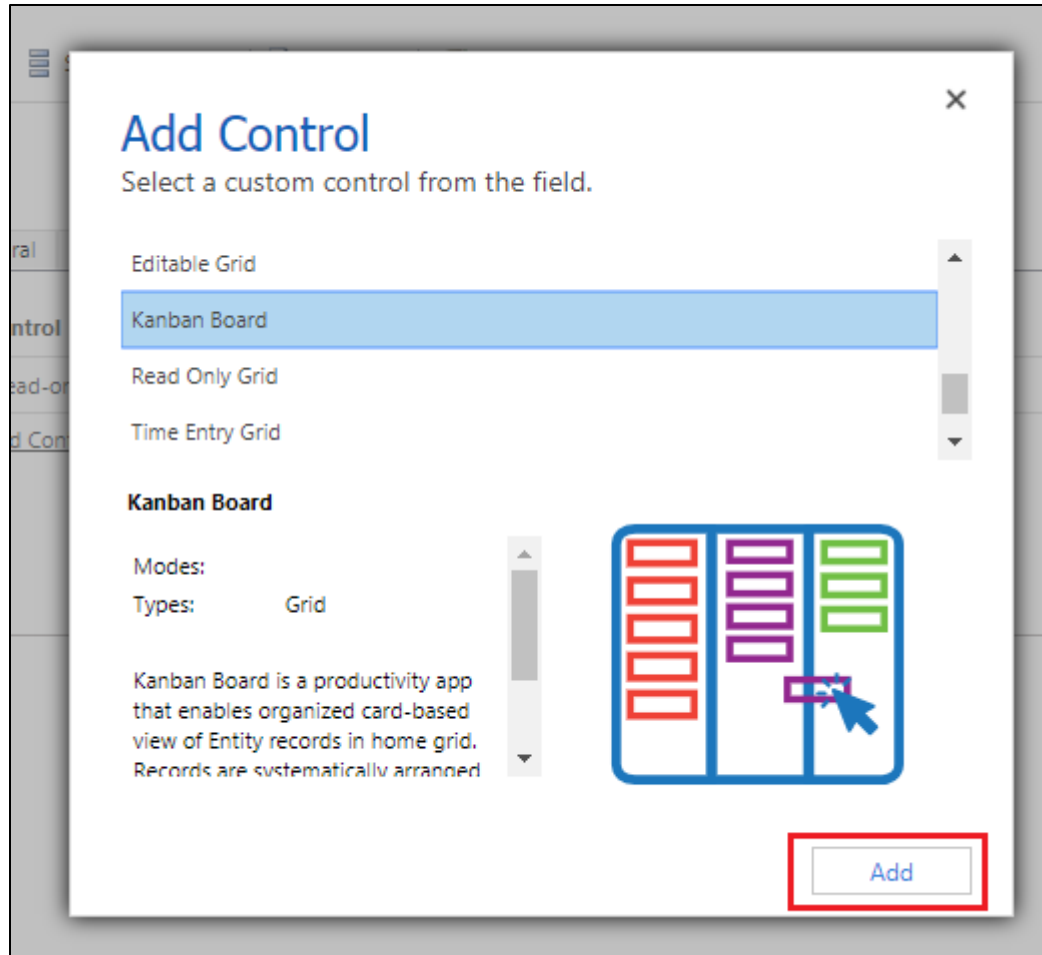
## Kanban Board – User Manual



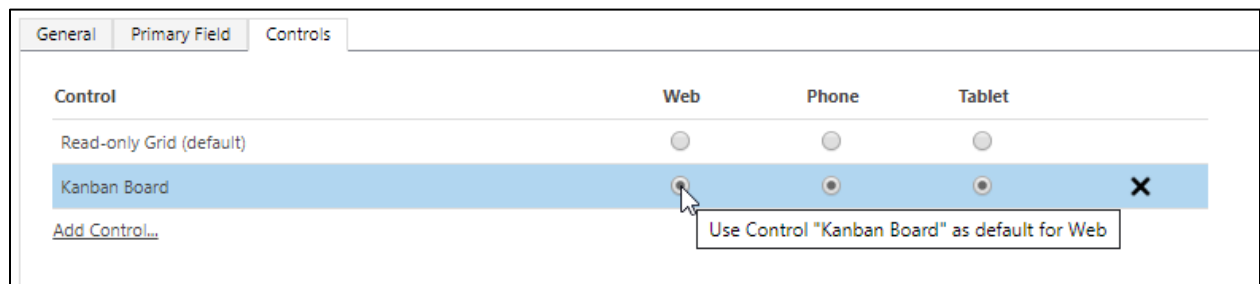
4) Now go to Components → Entities → Select Case → Click on the last tab – Controls.



5) Now click on Add Control → Select Kanban Board → Click on **Add**.

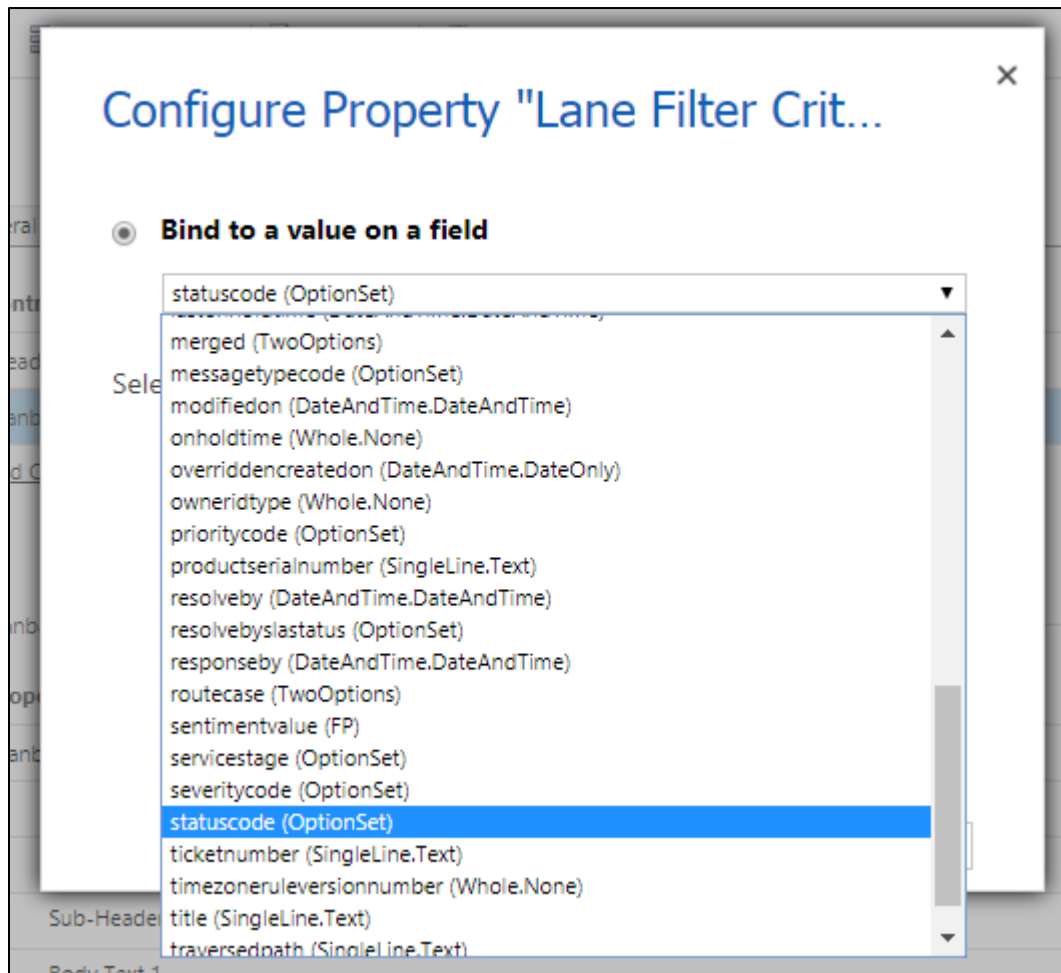


- 6) The radio button before Kanban Board denotes by default which control is to be loaded for Case Entity i.e. CRM OOB Grid (Read-only) or Kanban Board. If you want to display Kanban Board on Web (Computer or laptop devices) then select Web Radio button before Kanban Board. Similarly, you can select Phone or Tablet Radio button to display Kanban Board on Phone or Tablet. Here we have selected all three display modes.

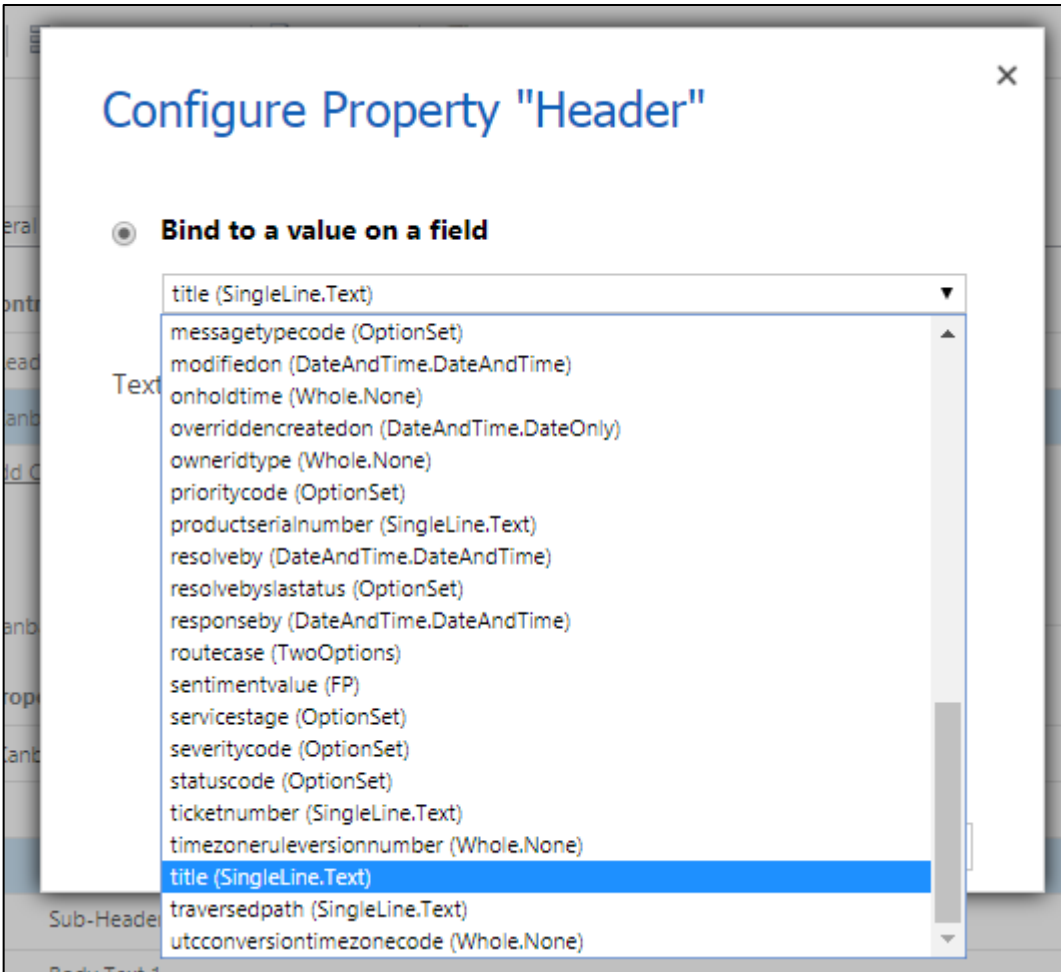


- 7) Next, for the field Lane Filter Criteria – Select the field based on which Lists will be categorized. Here, since we are selecting statuscode the list will be created based on Status Reason of Case Entity. For example: In Progress, On Hold , Waiting for details, etc.

Property	Value
Kanban Board Grid Views	
Lane Filter Criteria *	
Header	
Sub-Header	
Body Text 1	



- For the field Header - Select the field value that is to be displayed on header of card. In similar way populate the Sub-Header fields.



- 9) For Activity Name - Enter up to 3 Activity type entity logical name that you want to display on card. Now you have to just click on these icons to create activities from Kanban Board.



**Configure Property "Activity name(...)**

☒ **Bind to a static value**

SingleLine.Text ▼ email,phonecall,task

☐ **Bind to a value on a field**

Enter upto 3 logical name of activity type entity Eg:  
email,phonecall,task

OK Reset

- 10) For Card Mode - Enter the default card mode to display the details of records. (Y for collapsed mode and N for expanded mode). If the field is left blank then cards will be displayed in default **collapsed** mode.

### Configure Property "Card mode(Y ...

☒ **Bind to a static value**

SingleLine.Text

Y








☐ **Bind to a value on a field**

Default card mode to be opened i.e Y = collapsed(default if none entered) , N = expand

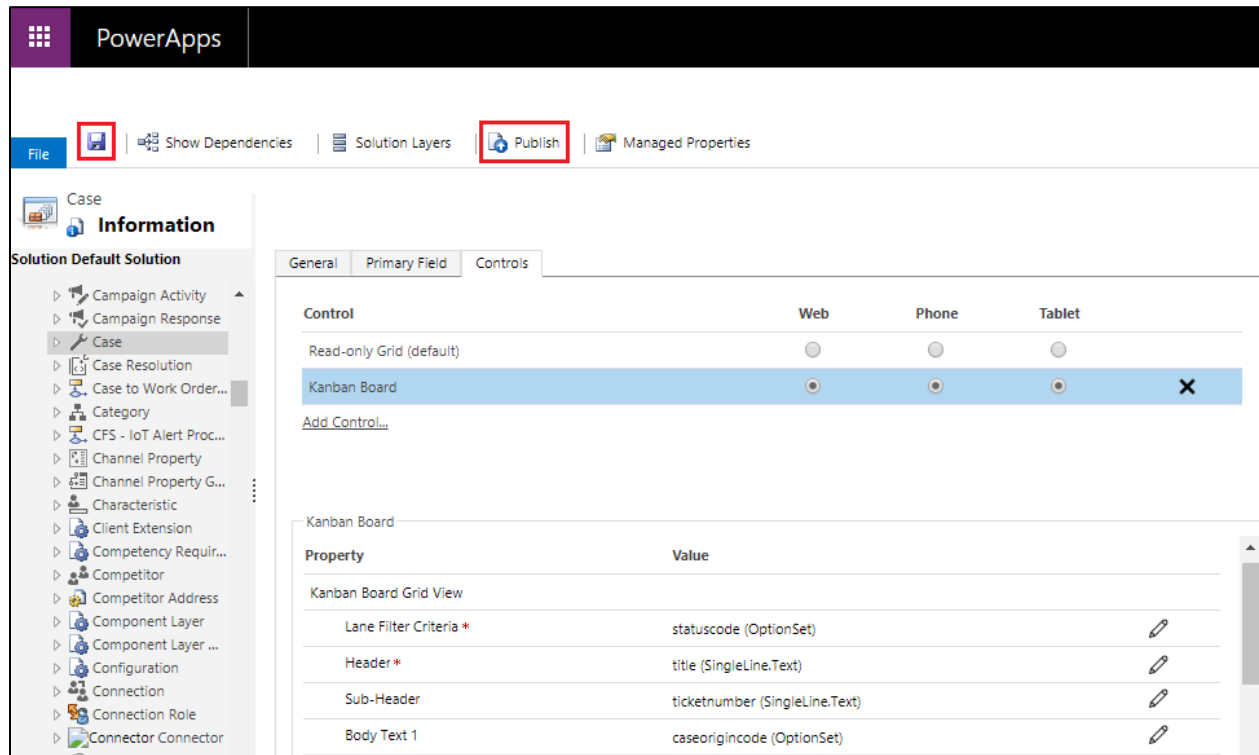
OK

Reset

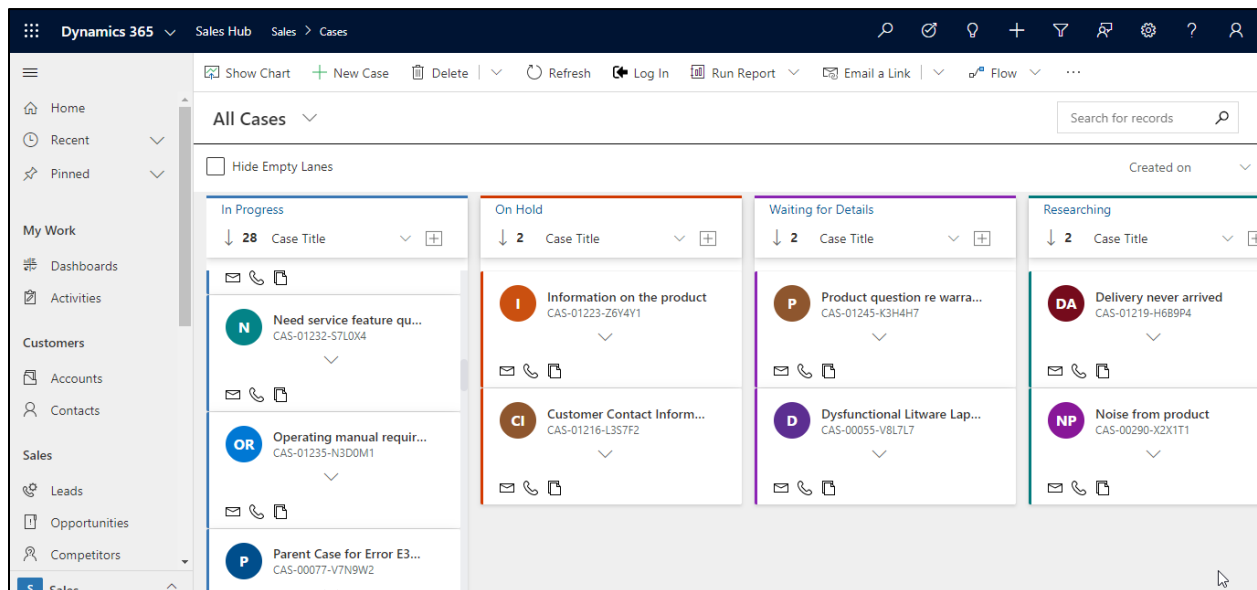
Given below is the example for Kanban Board configuration FOR Case entity.

Kanban Board		
Lane Filter Criteria *	statuscode (OptionSet)	
Header *	title (SingleLine.Text)	
Sub-Header	ticketnumber (SingleLine.Text)	
Body Text 1	caseorigincode (OptionSet)	
Body Text 2	createdon (DateTime.DateAndTime)	
Body Text 3	casetypecode (OptionSet)	
Activity name(comma separated)	email,phonecall,task (SingleLine.Text)	

11) After filling all the details, the next step is to save the configuration and then finally publish it.

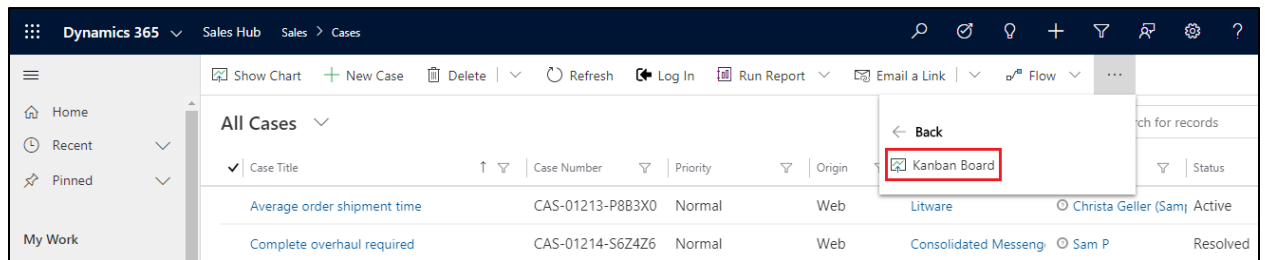
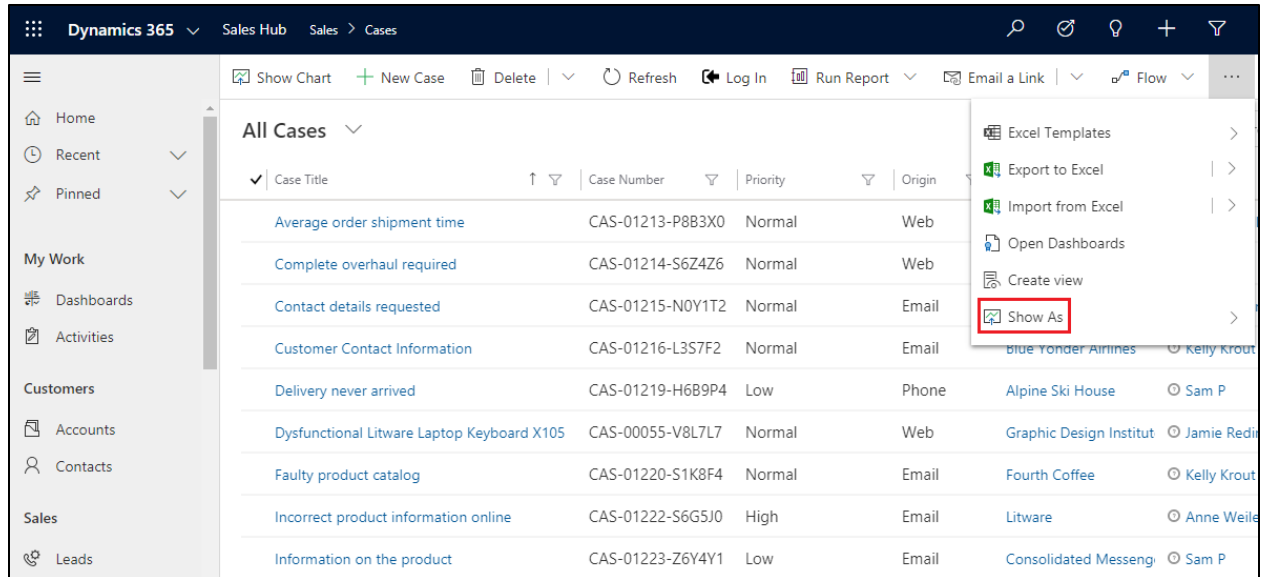


Your control will be now displayed on grid.

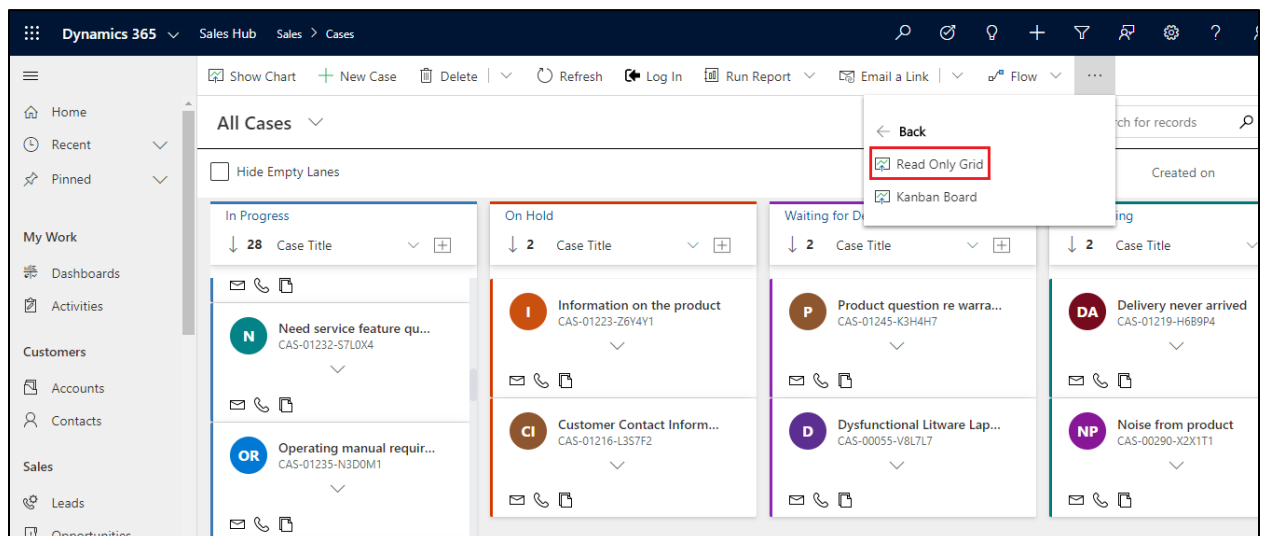


If you didn't select any of the Radio Buttons, then for viewing Kanban Board you would have to navigate to Case entity grid → Click on ellipses → Select 'Show As' → Click on Kanban Board.

## Kanban Board – User Manual



And if you have selected web radio button before Kanban, then to switch back to default grid you would have to follow same step as mentioned above. But this time you would have to select Read Only Grid.

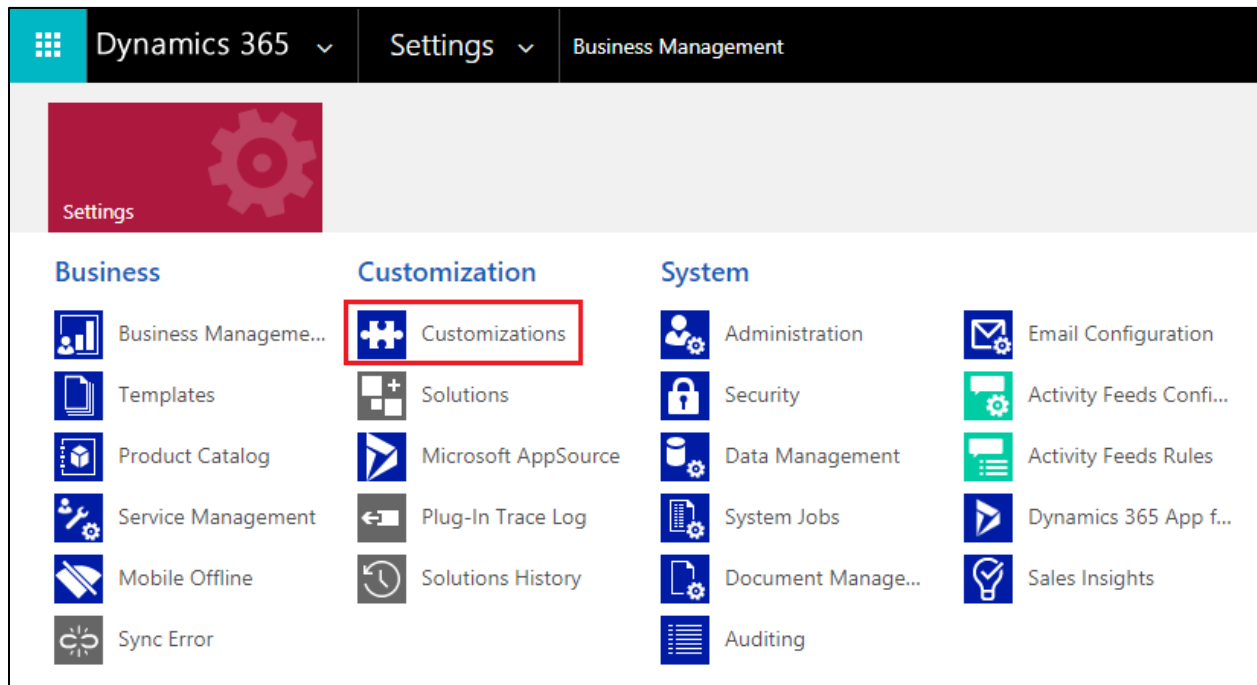


## Configuration for Specific View

Apart from this, you can make the Kanban Board available for **certain views in an Entity**. This is possible by adding Data-set Control on Entity Views.

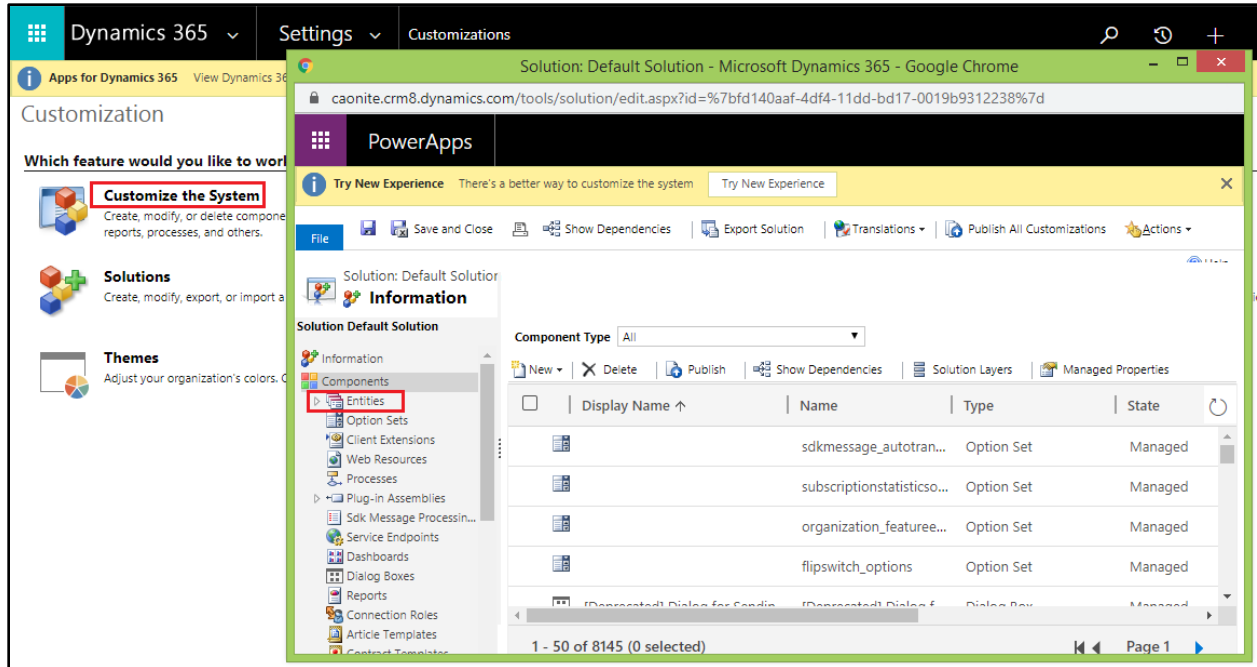
To add Data-set Control on Entity Views follow the steps given below:

- 1) Go to Settings → Customizations.

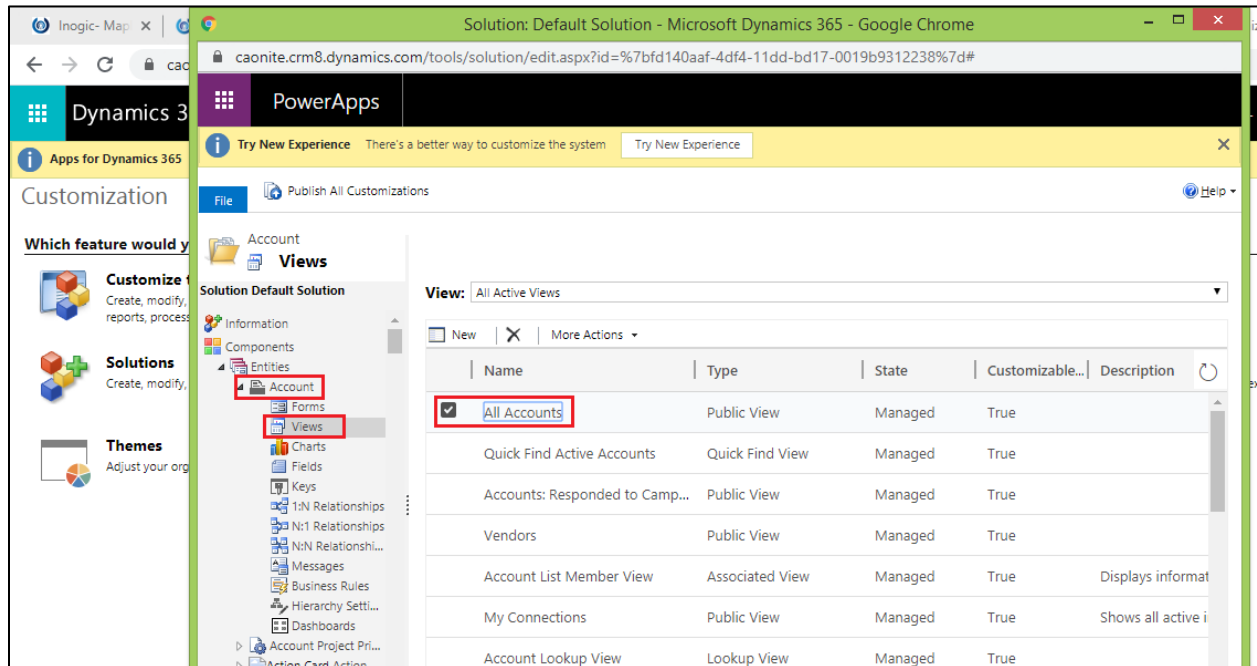


- 2) From there go to Customize the System → Entities.

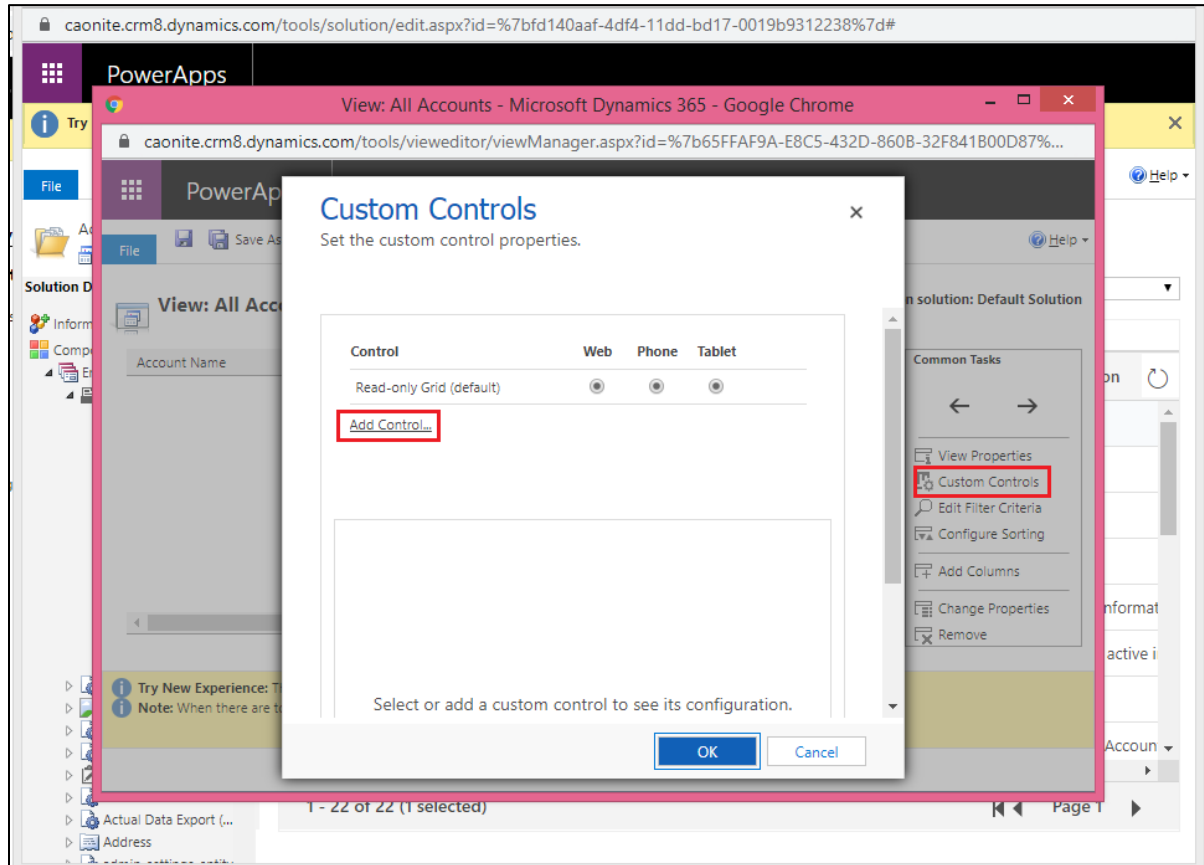
## Kanban Board – User Manual



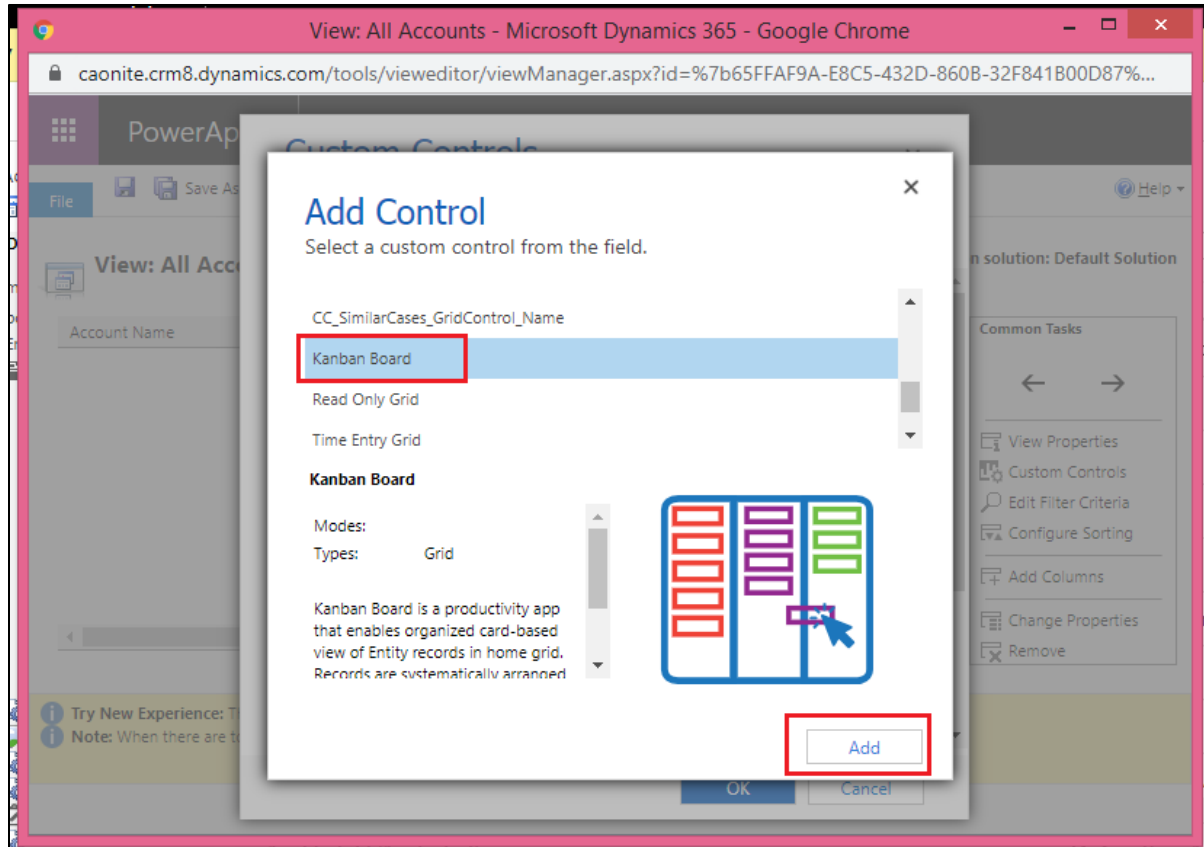
3) Next, click on any Entity, for e.g. 'Account' → Views → Click on any view, for e.g. 'All Account'.



- 4) In that click on 'Custom Controls' → 'Add Control'.



- 5) Here a list of Data-set control will be displayed. Select the respective Data-set Control that you want to add i.e. 'Kanban Board' → Click on 'Add'.

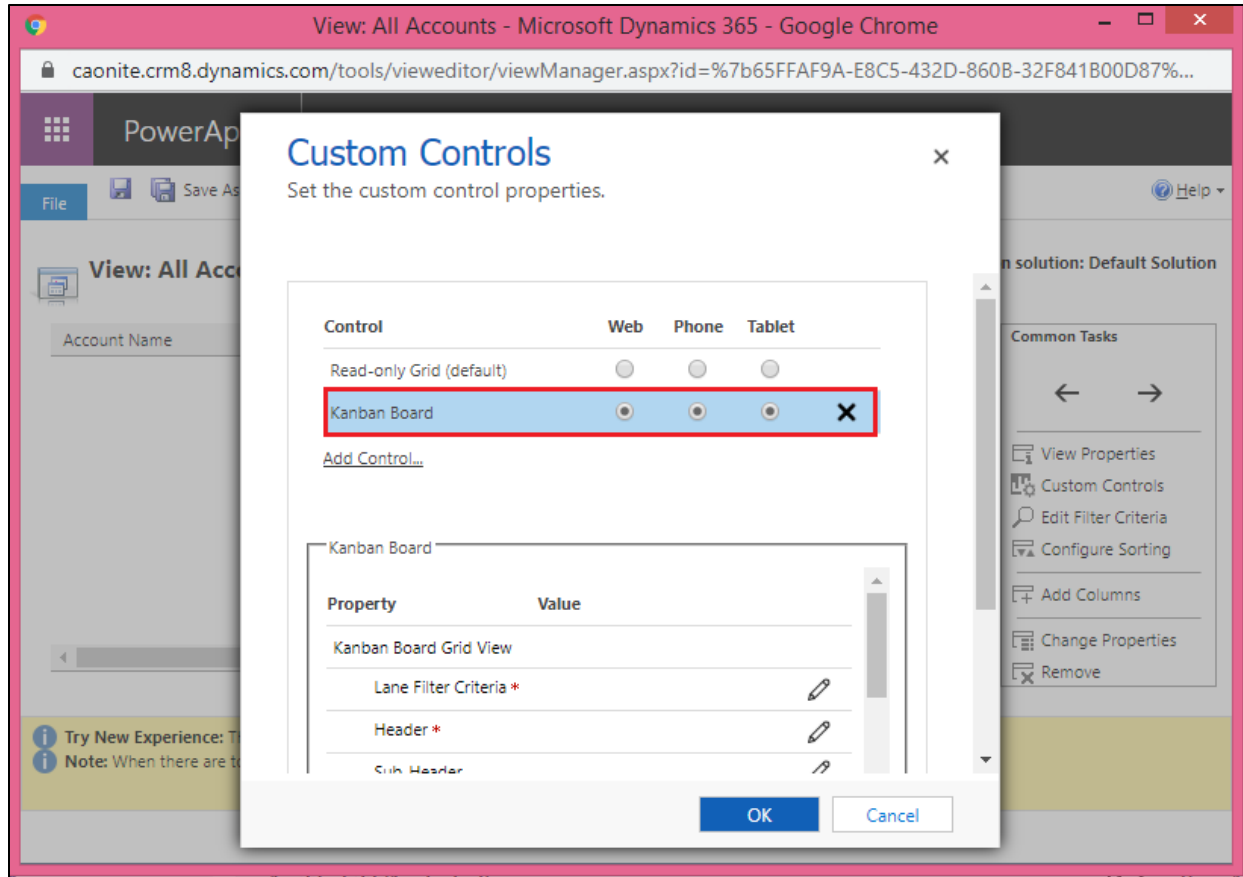


**Note:** Added control will be available for this view only and not for all views.

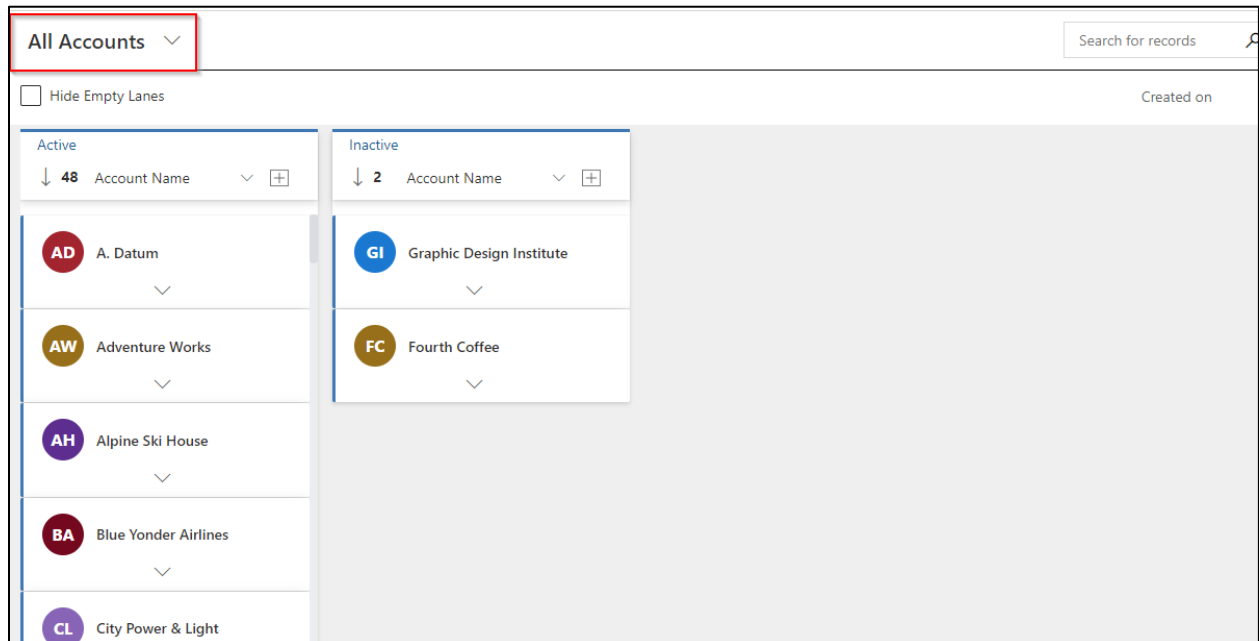
- 6) Next enable Kanban Board for Web, Phone and Tablet.



## Kanban Board – User Manual



7) Now it will be shown to only the specific view 'All Accounts'.

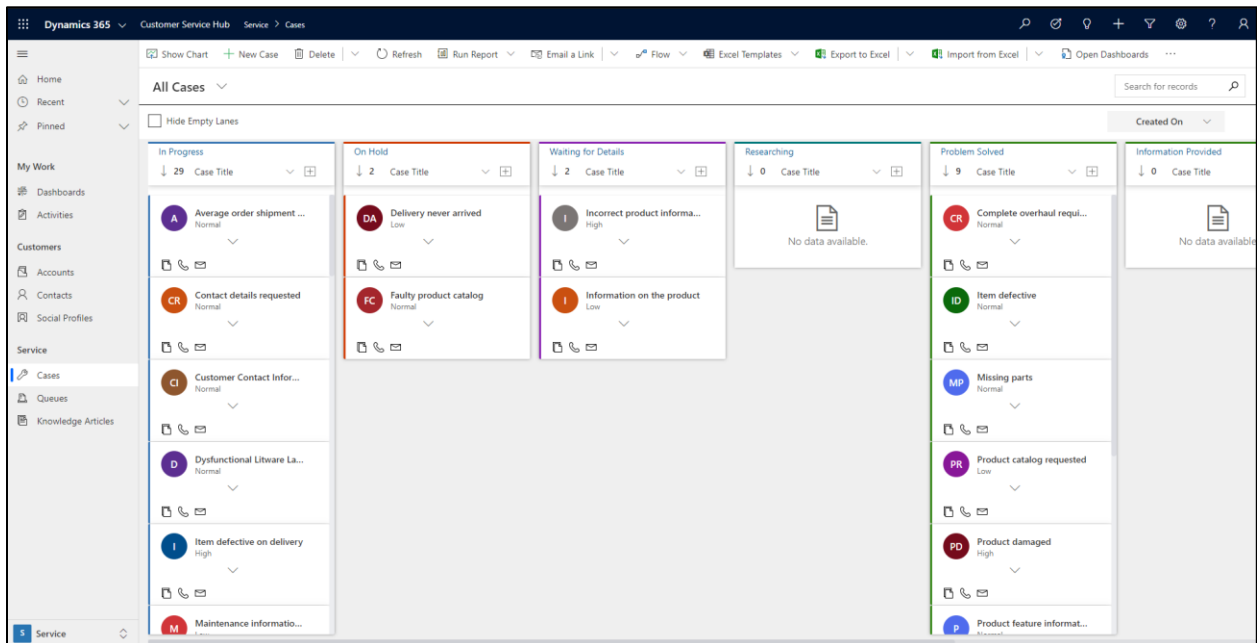


## Kanban Board Features

Kanban Board provides an organized view of records on home grid. Its various features helps to systematically organize records as per requirement. Let's have a look at these features of Kanban Board:

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

Kanban Board presents the selected View in a Kanban view for quick access and easy understanding and classification of the data in the view.

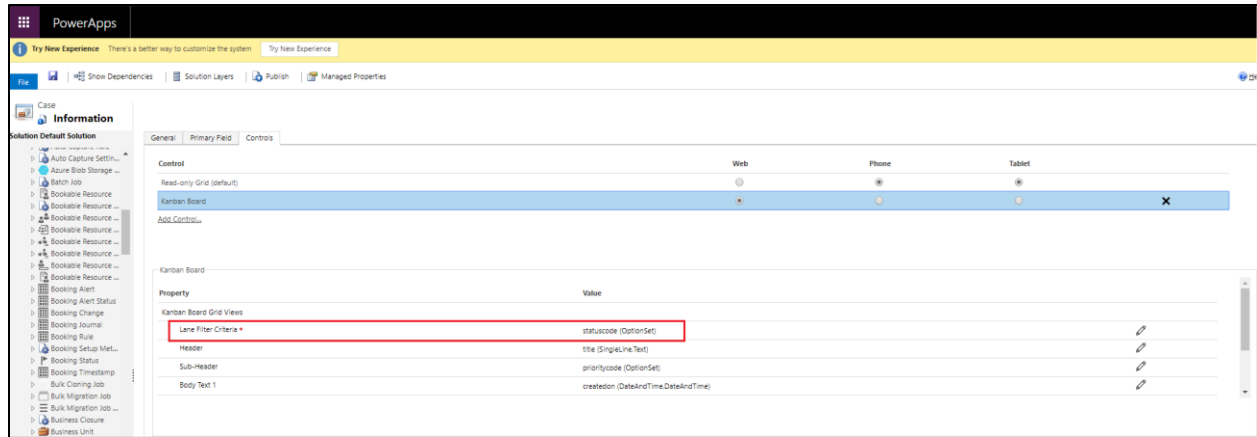


The lanes are defined based on the unique value options supported for the specified field. The product currently supports all field types except complex field types like Customer and Multi-Select Optionset for defining lane categories.

Hide Empty lanes using the filter option provided at the top. Do note if the lanes are hidden, you will not be able to move the cards to the said lane and thereby update the record to that status.

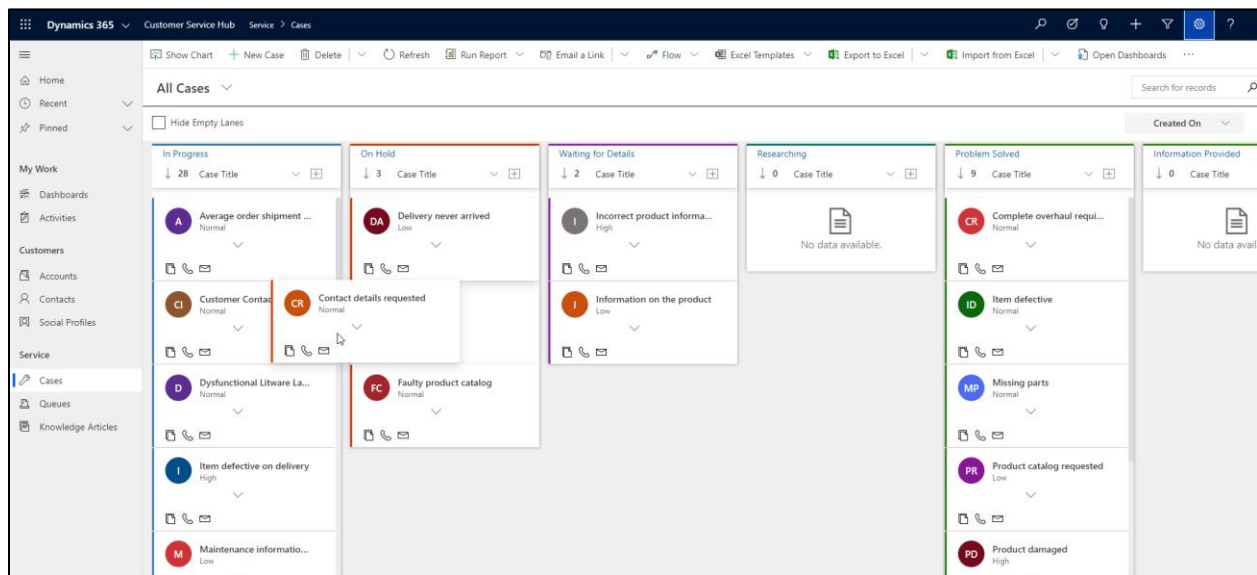
The field to be used for lane categories can be defined when configuring the Kanban View Component for a view as shown below.

## Kanban Board – User Manual



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

Kanban Board presents a Kanban view of the records presented as compact cards. The product supports moving the records around from one lane to another with a quick drag and drop action. This also results in updating the corresponding field value appropriate to the data value of the lane.



3. Quick access to important information in a compact card view.

The records in the Kanban View are represented as compact cards. You can define up to 5 fields to be displayed in the card.

Header Text

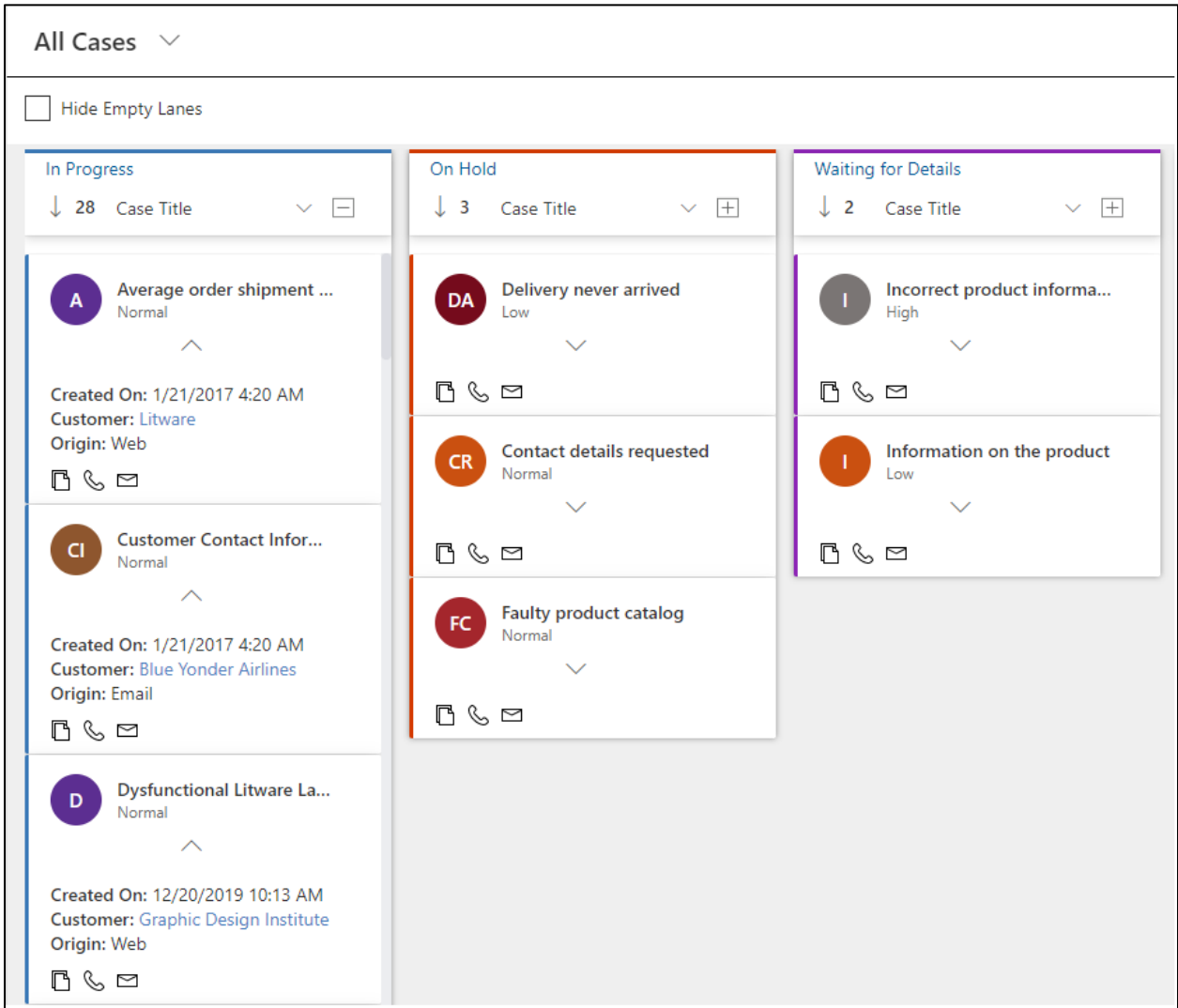
Sub Header Text

Body Text 1

Body Text 2

Body Text 3

You can collapse and expand the card view to show the details defined for the card.



Double-click on the card to open the record form.

The fields for these can be defined when configuring the component for a view as shown in the screenshot below.

## Kanban Board – User Manual

The screenshot shows the 'Kanban Board' configuration window. At the top, there are tabs for 'General', 'Primary Field', and 'Controls'. The 'Controls' tab is active, showing a table with columns for 'Control', 'Web', 'Phone', and 'Tablet'. The 'Kanban Board' control is selected, and its configuration is shown below. The 'Kanban Board Grid Views' section includes a 'Lane Filter Criteria' table with columns for 'Header', 'Sub-Header', 'Body Text 1', 'Body Text 2', and 'Body Text 3'. The 'Body Text 1' row is highlighted, showing the 'statuscode (OptionSet)' field. The 'Body Text 2' row shows the 'createdon (DateAndTime.DateAndTime)' field. The 'Body Text 3' row shows the 'customerid (Lookup.Customer)' field. The 'Body Text 4' row shows the 'caseorigincode (OptionSet)' field.

Control	Web	Phone	Tablet
Read-only Grid (default)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Kanban Board	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Add Control...

Kanban Board

Kanban Board Grid Views

Lane Filter Criteria *	
Header	title (SingleLine.Text)
Sub-Header	prioritycode (OptionSet)
Body Text 1	createdon (DateAndTime.DateAndTime)
Body Text 2	customerid (Lookup.Customer)
Body Text 3	caseorigincode (OptionSet)

### 4. Support to define quick activity actions for the records.

Each card supports defining of up to 3 quick activity actions. You can create the activity record defined in a single click from this view.

The screenshot shows the 'All Cases' view with three lanes: 'In Progress', 'On Hold', and 'Waiting for Details'. Each lane has a list of cases. The 'In Progress' lane has two cases: 'Average order shipment ...' and 'Customer Contact Infor...'. The 'On Hold' lane has three cases: 'Delivery never arrived', 'Contact details requested', and 'Faulty product catalog'. The 'Waiting for Details' lane has two cases: 'Incorrect product informa...' and 'Information on the product'. Each case card includes a status icon, title, priority, and a 'Quick Create' button (represented by a document icon, a phone icon, and an envelope icon). The 'Quick Create' button for the 'Average order shipment ...' case is highlighted with a red box.

All Cases

☐ Hide Empty Lanes

**In Progress** (28 cases)

- A** Average order shipment ... (Normal)  
Created On: 1/21/2017 4:20 AM  
Customer: Litware  
Origin: Web  
**Quick Create** (Document, Phone, Envelope icons)
- CI** Customer Contact Infor... (Normal)

**On Hold** (3 cases)

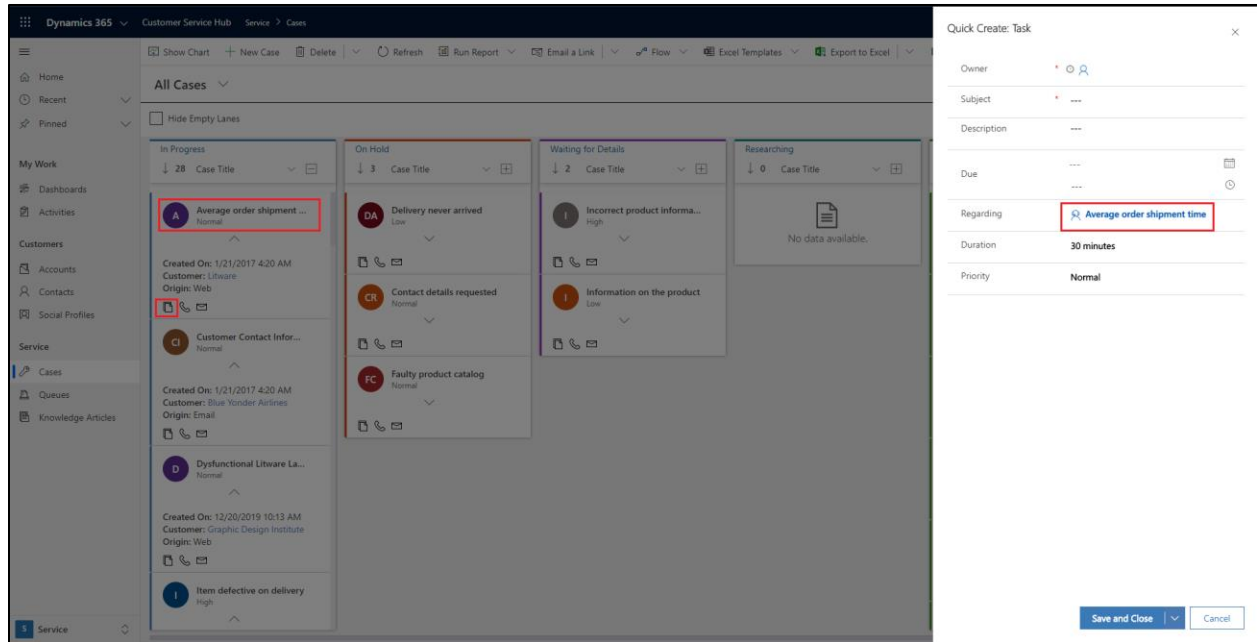
- DA** Delivery never arrived (Low)  
**Quick Create** (Document, Phone, Envelope icons)
- CR** Contact details requested (Normal)  
**Quick Create** (Document, Phone, Envelope icons)
- FC** Faulty product catalog (Normal)

**Waiting for Details** (2 cases)

- I** Incorrect product informa... (High)  
**Quick Create** (Document, Phone, Envelope icons)
- I** Information on the product (Low)  
**Quick Create** (Document, Phone, Envelope icons)

The quick create form that shows up comes pre-populated with the reference to the said record already set.

## Kanban Board – User Manual



The activities to be supported can be defined in the configuration screen when setting up the component for a view as shown in the screenshot below.

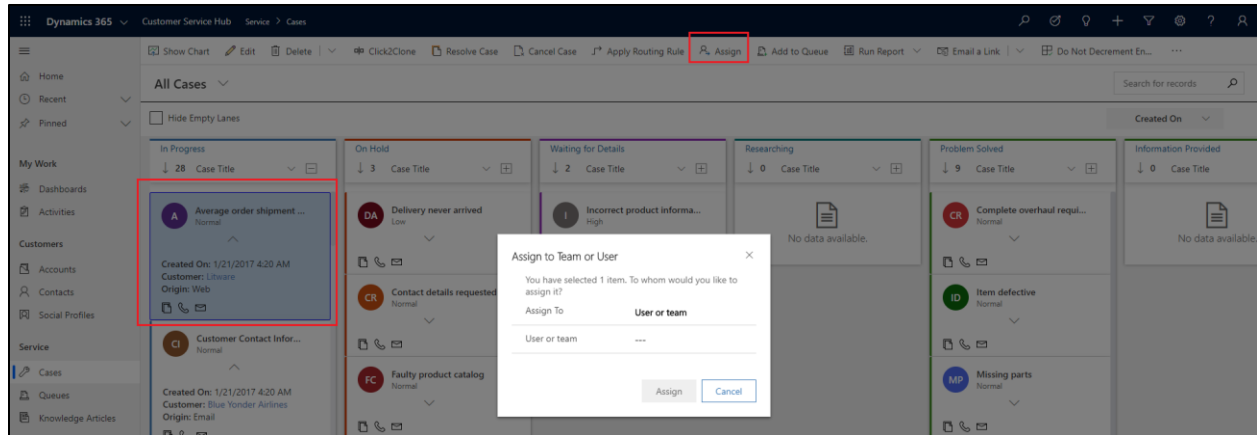


Make sure to type in the schema name of the activity types. You can also choose a custom activity type here.

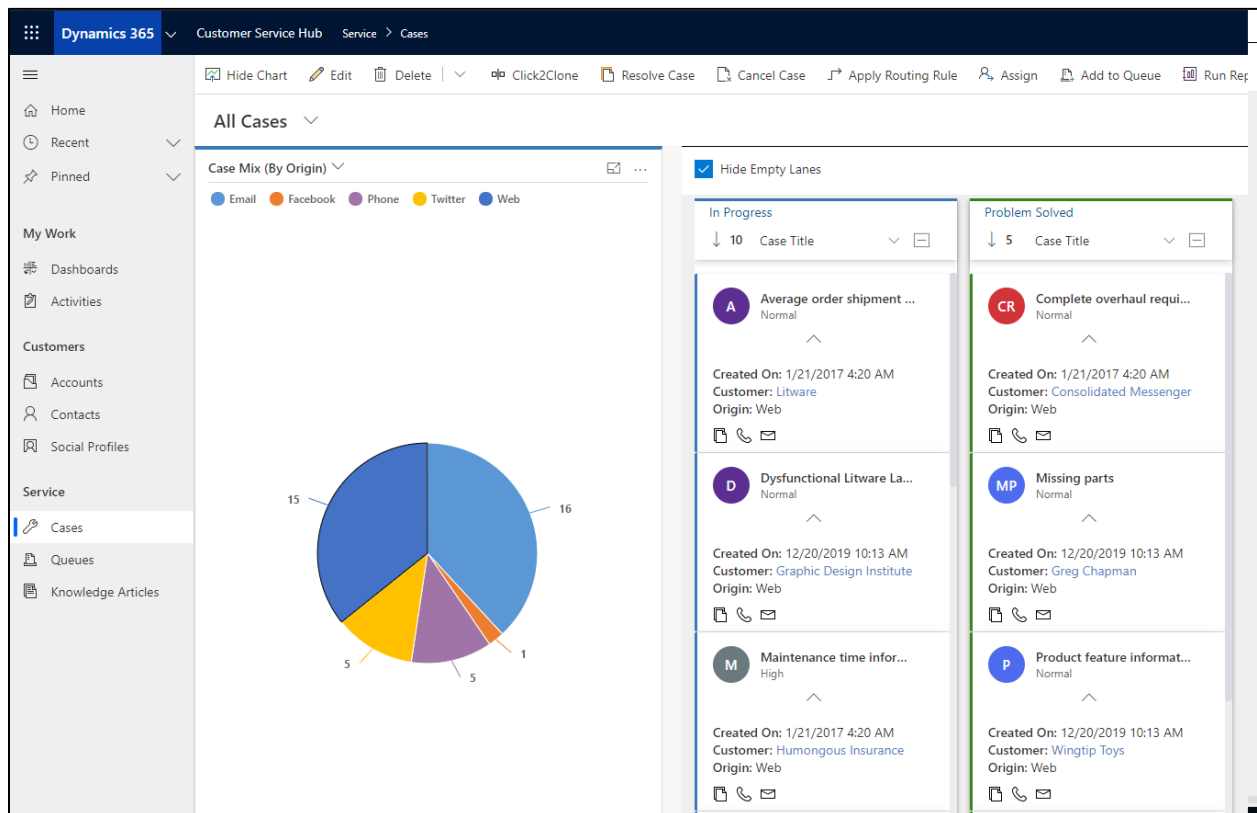
5. Works in context of the native CRM environment and responds to all native ribbon actions available for traditional views.

Kanban Board has been created as a Power Apps Component. This means that you can use this control to replace the default visualization available for the views in CRM. 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.

## Kanban Board – User Manual



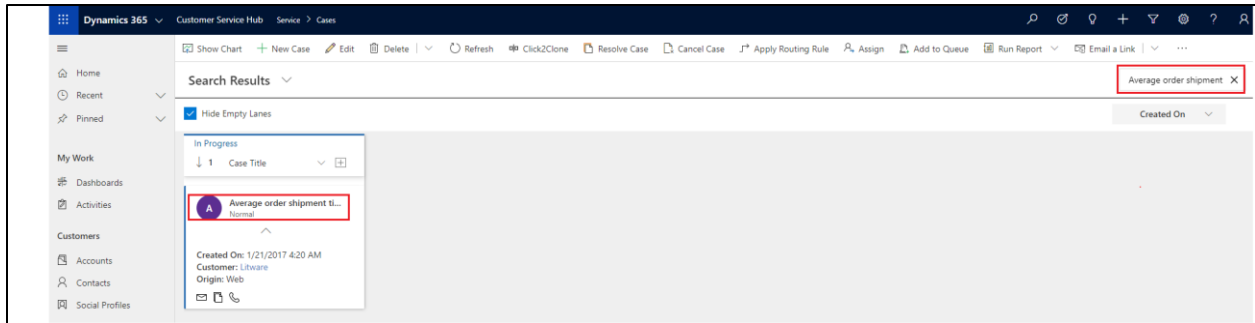
Apart from the ribbon it also responds to filtering options from Charts.



### 6. Support for search through native quick search available for views in CRM.

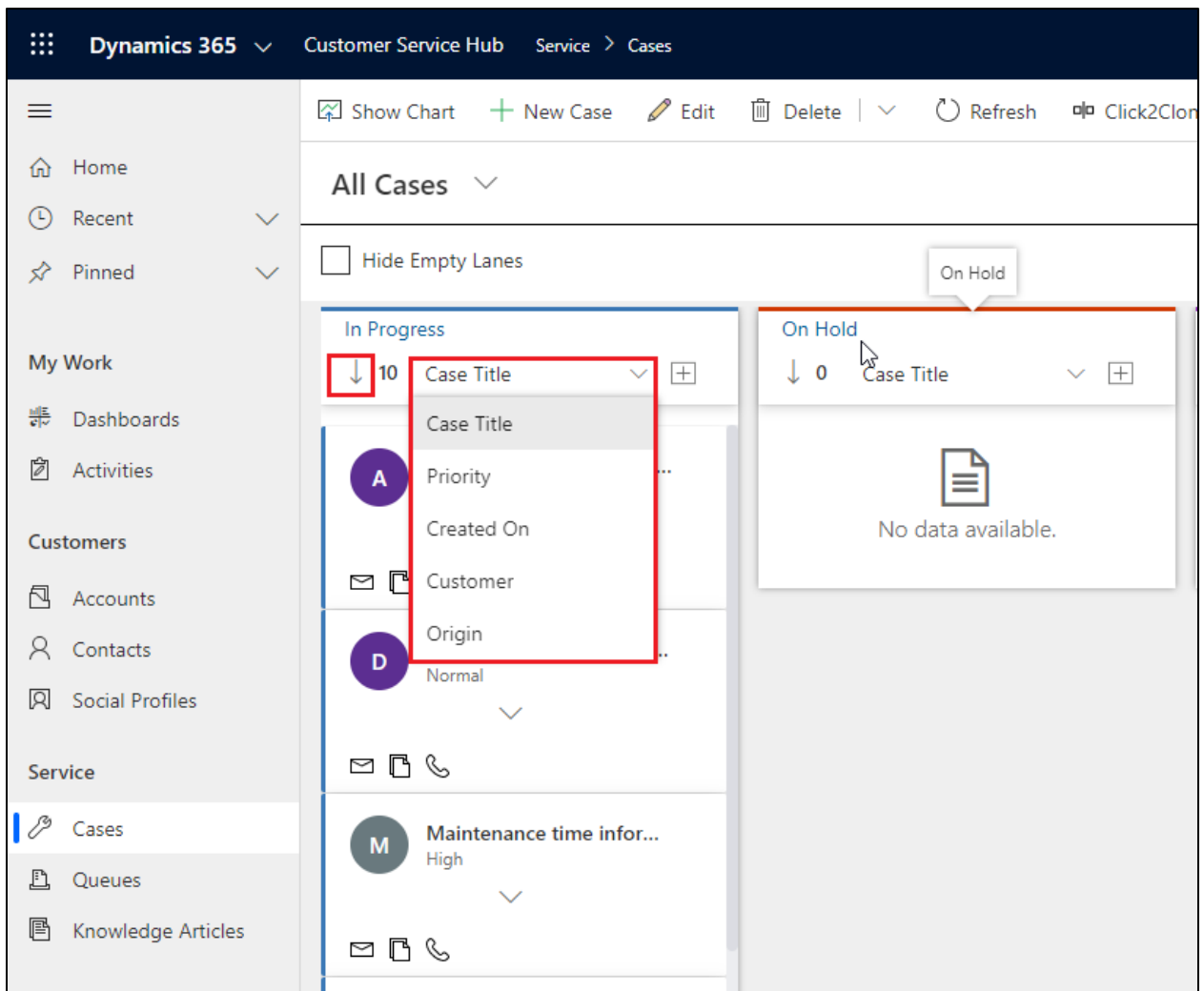
Being a Power Apps Component that replaces the OOB grid components of the view, results of the quick search is reflected in the Kanban view as well.

## Kanban Board – User Manual



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

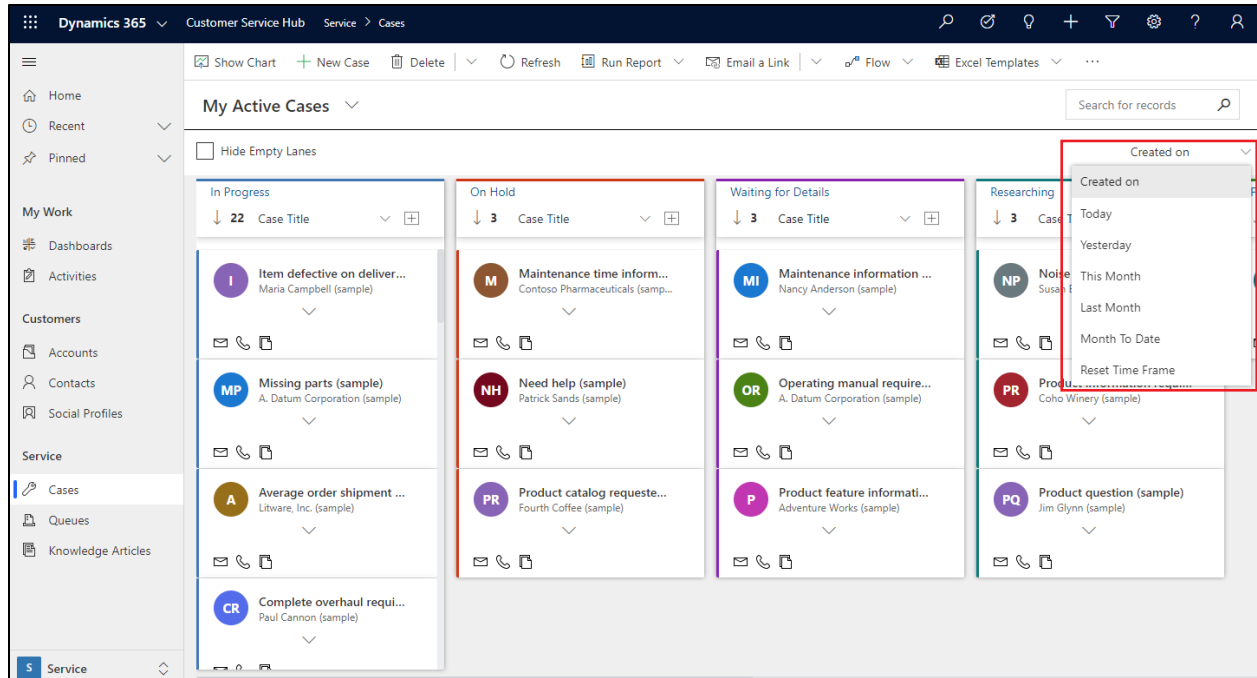
The Kanban Board supports the ability to sort the cards in ascending or descending order of the field selected. You will be allowed to sort the cards based on the fields used in the card view.



In addition to the quick search option, it also supports filtering of the records based on the “CreatedOn” date.



## Kanban Board – User Manual



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