



User Manual

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Introduction

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.

Security Roles

There is no specific security roles for Kanban Board.

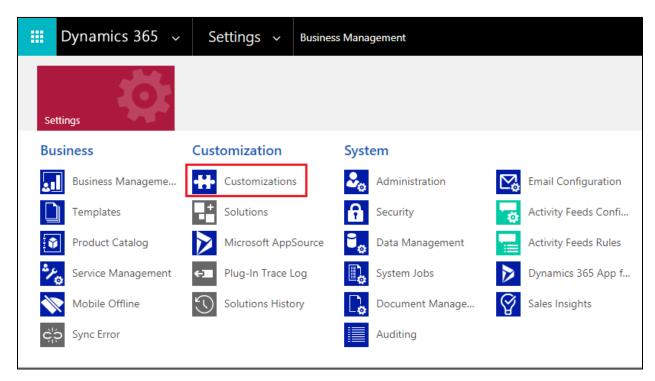
Kanban Board Configuration

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 \rightarrow Select Advanced settings.

| | Dynamics 3 | 65 🗸 | Sales Hub Sales > Accounts | | | م | ଷ ଜ | + | 7 | ጽ | ۲ | ? |
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| | inned | ~ | ✓ Account Name ↑ | | Address 1: City 🛛 🖓 | Primary Cor | | Notificatio | n Displa | ıу Т | | 7 |
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| | ashboards | | Microsoft | 1-555-555-0135 | 1 Microsoft Way | Isaac Ligh | tner | | isaac.l | ightner@ | Donemi | crosoft.cc |
| A | ctivities | | School of Fine Art | +011-1-399-555-9000 | . Mississaugua | Shaun Bea | asley | | info@ | fineartso | :hool.ne | et |
| Custor | mers | | Tailspin Toys | 297-555-0192 | Tokyo | Marco Tar | nara | | mtana | ira@tails | pintoys | .com |
| 🖪 A | ccounts | | Trey Research | +49-(0)89-0110-0 | Munich | Humberto | Acevedo | | info@ | treyrese | arch.net | t |
| Ro | Contacts | | Wide World Importers | +90-211-001-1234 | Istanbul | Sean Chai | | | info@ | widewo | rldimpo | rters.com |

2) Then go to Settings \rightarrow Customizations.



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

| | Dynamics 365 🗸 | Settings 🗸 | Customizations | | م |
|------|---|---------------------------|---|----|--|
| Cust | tomization | | | | |
| Whic | h feature would you like to v | work with? | | | |
| | Customize the System Create, modify, or delete com reports, processes, and others | ponents in your organizat | ion. Components include entities, fields, relationships, forms, | 8. | Publishers Create, modify or delete a solution publisher. |
| Ŷ | Solutions Create, modify, export, or imp | ort a managed or unmana | aged solution. | | Developer Resources View information or download files that help you develop. |

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

| | PowerApps | | | | | | |
|------------------|--|--|---------|-------|--------|--|--|
| File | 🛃 🛛 🕰 Show Depend | encies 🗧 Solution Layers 🕞 Publish 🚰 Managed Pro | perties | | | | |
| | Case Information Iution Default Solution General Primary Field Controls | | | | | | |
| | Campaign Activity | Control | Web | Phone | Tablet | | |
| | Case Case Resolution | Read-only Grid (default) | ۲ | ۲ | ۲ | | |
| | Case to Work Order | Add Control | | | | | |
| | Category | | | | | | |
| \triangleright | Channel Property | | | | | | |

5) Now click on Add Control \rightarrow Select Kanban Board \rightarrow Click on Add.

| | dd Control | × |
|----------|---|----|
| Ec | ditable Grid | * |
| Ka | anban Board | |
| Re | ead Only Grid | ł. |
| Ti | me Entry Grid | - |
| Ka | anban Board | |
| | Iodes: ypes: Grid | |
| th vi | anban Board is a productivity app nat enables organized card-based ew of Entity records in home grid, ecords are systematically arranged | |
| | 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.

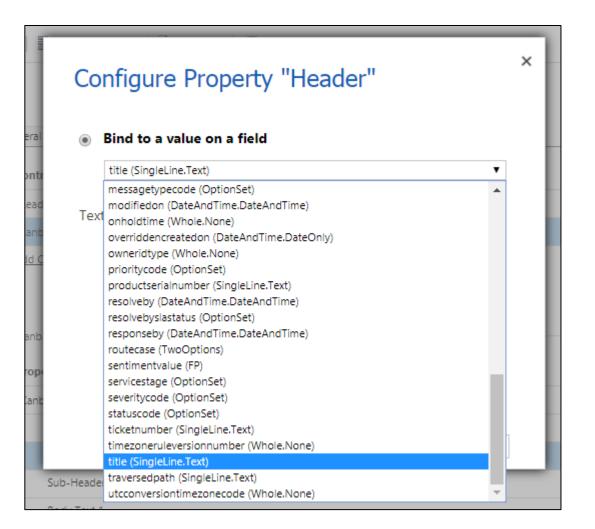
| eneral Primary Field Controls | | | | |
|-------------------------------|-------|--------------------|----------------------|-----|
| Control | Web | Phone | Tablet | |
| Read-only Grid (default) | 0 | 0 | 0 | |
| Kanban Board | ٩ | ۲ | ۲ | × |
| Add Control | Use C | Control "Kanban Bo | oard" as default for | Web |

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.

| Kanban | Board - | User | Manual |
|--------|---------|------|--------|
|--------|---------|------|--------|

| K | anban Board | | |
|-----|-----------------------|--|---|
| P | roperty | Value | |
| ĸ | anban Board Grid View | S | |
| | Lane Filter Criteria | * | Ø |
| | Header | | Ø |
| _ | Sub-Header | | Ø |
| _ | Body Text 1 | | - |
| | | | |
| | | | |
| 0 | | | |
| - | | | |
| | | | |
| | Co | nfigure Property "Lane Filter Crit | |
| | | | |
| | | | |
| | | | |
| ral | ۲ | Bind to a value on a field | |
| | | | |
| ntr | | statuscode (OptionSet) 🔹 | |
| | | merged (TwoOptions) | |
| ead | | messagetypecode (OptionSet) | |
| | Sele | modifiedon (DateAndTime.DateAndTime) | |
| anb | | | |
| | | onholdtime (Whole.None) | |
| d C | | overriddencreatedon (DateAndTime,DateOnly) | |
| | | owneridtype (Whole.None) | |
| | | prioritycode (OptionSet) | |
| | | productserialnumber (SingleLine,Text) | |
| | | resolveby (DateAndTime.DateAndTime) | |
| nb | | resolvebyslastatus (OptionSet) | |
| | | responseby (DateAndTime.DateAndTime) | |
| op | | routecase (TwoOptions) | |
| | | sentimentvalue (FP) | |
| anb | | servicestage (OptionSet) | |
| | | severitycode (OptionSet) | |
| | | statuscode (OptionSet) | |
| | | ticketnumber (SingleLine.Text) | |
| | | timezoneruleversionnumber (Whole.None) | |
| | Sub-Header | title (SingleLine.Text) | |
| | | traversedpath (SingleLine.Text) | |
| | Body Text 1 | | |

8) 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.

| ۲ | Bind to a static value |
|---|--|
| | SingleLine.Text email,phonecall,task |
| | Bind to a value on a field |
| | er upto 3 logical name of activity type entity Eg: ail,phonecall,task |
| | |
| | |

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.

| С | onfigure Property "Card mode(Y | × |
|---|--|---|
| ۲ | Bind to a static value | |
| | SingleLine.Text V | |
| 0 | Bind to a value on a field | |
| | Ŧ | |
| | efault card mode to be opened i.e Y = collapsed(default if none tered) , N = expand | |
| | | |
| | | |
| | | |

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

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

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

| PowerApps | | | | | |
|--|--|--------------------------------|-------|--------|---|
| File | cies 🗏 Solution Layers 🔂 Publish [| T Managed Properties | | | |
| Case Case Case Case Case Case Case Case | General Primary Field Controls | | | | |
| Campaign Activity Campaign Response | Control | Web | Phone | Tablet | |
| > 🎤 Case | Read-only Grid (default) | 0 | 0 | 0 | |
| ▷ Case Resolution ▷ Z Case to Work Order | Kanban Board | ۲ | ۲ | ۲ | × |
| ↓ Category ↓ CFS - IoT Alert Proc ↓ Channel Property ↓ Channel Property G ↓ Characteristic | Add Control | | | | |
| Client Extension | Kanban Board | | | | |
| Competency Requir | Property | Value | | | |
| a Competitor a Competitor Address | Kanban Board Grid View | | | | |
| Component Layer | Lane Filter Criteria * | statuscode (OptionSet) | | | Ø |
| Component Layer Configuration | Header * | title (SingleLine.Text) | | | 0 |
| Connection | Sub-Header | ticketnumber (SingleLine.Text) | | | 0 |
| Connection Role Connector Connector | Body Text 1 | caseorigincode (OptionSet) | | | 0 |

Your control will be now displayed on grid.

| :::: Dynamics 365 $ \smallsetminus $ | Sales Hub Sales > Cases | | ନ ଓ କ | - v & @ ? A |
|---|---|--|---|--|
| = | 🛱 Show Chart 🕂 New Case 📋 Delete | │ ∨ 🖒 Refresh 🕻 Log In 🔟 Run R | eport $ \lor $ Email a Link $ \mid \lor $ o' ^e Flow | × … |
| ↔ Home (¹) Recent | All Cases $\ arsimed$ | | | Search for records $\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \$ |
| | Hide Empty Lanes | | | Created on $\qquad \lor$ |
| | In Progress | On Hold | Waiting for Details | Researching |
| My Work | \downarrow 28 Case Title \checkmark \pm | \downarrow 2 Case Title \checkmark \pm | \downarrow 2 Case Title \checkmark \pm | \downarrow 2 Case Title \lor $=$ |
| #투 Dashboards | | | | |
| Activities Customers | Need service feature qu CAS-01232-S7L0X4 | Information on the product CAS-01223-Z6V4Y1 | Product question re warra CAS-01245-K3H4H7 | DA Delivery never arrived CAS-01219-H6B9P4 |
| Accounts | | | | □ \ G |
| A Contacts | Operating manual requir | CL Customer Contact Inform CAS-01216-L3S7F2 | Dysfunctional Litware Lap CAS-00055-V8L7L7 | Noise from product CAS-00290-X2X1T1 |
| Sales | CAS-01235-N3D0M1 | \sim | \sim | \sim |
| 🎸 Leads | \sim | | | |
| Opportunities | | | | |
| R Competitors | Parent Case for Error E3 CAS-00077-V7N9W2 | | | 5 |
| S Sales | | | | 45 |

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

| \cdots Dynamics 365 \vee | Sales Hub Sales > Cases | | | ନ ଓ ତ ଏ | + 7 |
|--|--|-----------------------------------|----------|----------------------------------|-------------|
| = | 🛱 Show Chart 🕂 New Case 🗎 Delete 🗸 | 🖒 Refresh 🛛 🕻 Log In 🗐 Run Report | ∨ 🖾 Emai | il a Link 🕴 🗸 💅 Flov | v ~ … |
| G Home G Recent ∨ | All Cases $~$ | | Œ | Excel Templates | > |
| ✓ Pinned ∨ | ✓ Case Title | ise Number 🛛 Priority 🏹 | Origin 5 | Export to Excel | > |
| ≫ Finned ~ | Average order shipment time C. | AS-01213-P8B3X0 Normal | Web | Import from Excel | > |
| My Work | Complete overhaul required C. | AS-01214-S6Z4Z6 Normal | Web |) Open Dashboards Create view | |
| Dashboards | Contact details requested C. | AS-01215-N0Y1T2 Normal | Email | Show As | > |
| Activities | Customer Contact Information C. | AS-01216-L3S7F2 Normal | Email | Blue Yonder Airlines | U Kelly Kro |
| Customers | Delivery never arrived C. | AS-01219-H6B9P4 Low | Phone | Alpine Ski House | 🛈 Sam P |
| Accounts | Dysfunctional Litware Laptop Keyboard X105 C | AS-00055-V8L7L7 Normal | Web | Graphic Design Institut | ⊙ Jamie Re |
| A Contacts | Faulty product catalog C | AS-01220-S1K8F4 Normal | Email | Fourth Coffee | O Kelly Kro |
| Sales | Incorrect product information online C | AS-01222-S6G5J0 High | Email | Litware | ⊙ Anne We |
| & Leads | Information on the product C. | AS-01223-Z6Y4Y1 Low | Email | Consolidated Messeng | 🛈 Sam P |

| ::: Dynamics 365 🗸 | Sales Hub Sales > Cases | \$ \$ \$ \$ | + 7 & ?? |
|-----------------------|--|---------------------------|-------------------------------|
| = | 図 Show Chart + New Case 前 Delete 〜 ひ Refresh に Log In 語 Run Report 〜 D | 킹 Email a Link 🌱 🖉 Flow | w ~ … |
| ය Home Â | All Cases 🗸 | \leftarrow Back | ch for records |
| I Recent ∨ I Pinned ∨ | ✓ Case Title $\uparrow \nabla$ Case Number ∇ Priority ∇ Origin | s 🖾 Kanban Board | √ Status |
| | Average order shipment time CAS-01213-P8B3X0 Normal Web | Litware | ⊙ Christa Geller (Sam⊧ Active |
| My Work | Complete overhaul required CAS-01214-S6Z4Z6 Normal Web | Consolidated Messeng | O Sam P Resolved |

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.

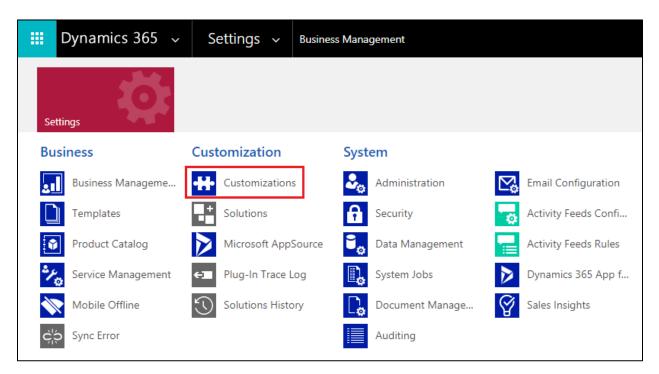
| \cdots Dynamics 365 \vee | Sales Hub Sales > Cases | | ନ ଓ ନ + | · \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ |
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| = | 🛱 Show Chart 🕂 New Case 🛍 Delete | 🛛 🗸 🕐 Refresh 🕻 Log In 🗐 Run Re | eport $ \lor $ Email a Link $ \mid \lor $ $ {}_{ m o} \prime^{ m e}$ Flow | ~ … |
| G Home G Recent ✓ | All Cases $~$ | | \leftarrow Back | ch for records ρ |
| S Pinned ∨ | Hide Empty Lanes | | 종 Read Only Grid | Created on |
| My Work | In Progress ↓ 28 Case Title ∨ + | On Hold ↓ 2 Case Title ∨ + | Waiting for D ↓ 2 Case Title ∨ + | ing ↓ 2 Case Title ✓ |
| Dashboards | | Information on the product | Product question re warra | Delivery never arrived |
| Customers | Need service feature qu CAS-01232-S7L0X4 | CAS-01223-Z6Y4Y1 | | CAS-01219-H6B9P4 |
| 🔁 Accounts | | | | |
| Contacts | Operating manual requir CAS-01235-N3D0M1 | CI Customer Contact Inform CAS-01216-L3S7F2 | D Dysfunctional Litware Lap CAS-00055-V8L7L7 | Noise from product CAS-00290-X2X1T1 |
| © Leads | ~ | | | |
| Opportunities | | | | |

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 \rightarrow Customizations.



2) From there go to Customize the System \rightarrow Entities.

| 🗰 Dynamics 365 🗸 S | Settings ~ Customization | s | | م | e se | + |
|--|-------------------------------------|---|------------------------------|----------------------------|--|----------|
| Apps for Dynamics 365 View Dynamics 36 | 0 | Solution: Default Solution - Microsof | t Dynamics 365 - Google | e Chrome | | × |
| Customization | | m/tools/solution/edit.aspx?id=%7bfd140a | af-4df4-11dd-bd17-0019b | 9312238%7d | | |
| Which feature would you like to worl | PowerApps | | | | | |
| Customize the System | | better way to customize the system Try New Ex | perience | | | × |
| Create, modify, or delete compone reports, processes, and others. | File | 🖺 🥰 Show Dependencies 🛛 🖳 Export Solu | ution 🛛 💱 Translations 👻 🗍 👔 | Publish All Customizations | <u>∕%</u> Actions → | |
| Solutions Create, modify, export, or import a | Solution: Default Solutior | | | | 6 |) |
| - | Solution Default Solution | Component Type All | • | | | |
| Themes Adjust your organization's colors. Q | 2 Information | 🖞 New 🗸 🗙 Delete 🛛 🚺 Publish 🛛 🖷 S | show Dependencies 🛛 🗧 Solu | tion Layers 🛛 🚰 Managed | Properties | |
| | djust your organization's colors. C | □ Display Name ↑ | Name | Туре | State | Ö |
| | Client Extensions | | sdkmessage_autotran | Option Set | Managed | ^ |
| | ₽rocesses ► +□ Plug-in Assemblies | | subscriptionstatisticso | Option Set | Managed | |
| | Sdk Message Processin | | organization_featuree | Option Set | Managed | |
| | Dashboards | | flipswitch_options | Option Set | Managed | |
| | Reports | Consected Dialog for Condin | (Depresented) Dialog f | Dialog Poy | Managed | • • |
| | Article Templates | 1 - 50 of 8145 (0 selected) | | M 4 | Page 1 | |

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

| 🔕 Inogic | - Mapi 🗙 📔 🌀 | 0 | Solution: Default Solution - N | Aicrosoft Dynamics 36 | 5 - Google Chron | ne | | × |
|--------------------------|------------------------------|---|--|-----------------------|------------------|--------------|-----------------|------------------|
| $\leftarrow \rightarrow$ | C 🔒 cao | a caonite.crm8.dynamics.co | m/tools/solution/edit.aspx?id=%7bfd1 | 40aaf-4df4-11dd-bd17- | 0019b9312238%7 | ;# | | |
| ∷ Dy | namics 3 | III PowerApps | | | | | | |
| Apps fo | r Dynamics 365 | Try New Experience There's | a better way to customize the system Try New | v Experience | | | | × |
| Custom | nization | File Publish All Customizati | ions | | | | (| <u>∂ H</u> elp + |
| Which fea | ature would y | Account | | | | | | |
| | Customize Create, modify, | Solution Default Solution | View: All Active Views | | | | | • |
| | reports, process | 🜮 Information 🔶 | | | | | | |
| | | Components | New X More Actions - | | | | | _ |
| | Solutions Create, modify, | Entities Account | Name | Туре | State | Customizable | Description | U . |
| | | Forms | All Accounts | Public View | Managed | True | | A |
| | Themes Adjust your org | Charts | Quick Find Active Accounts | Quick Find View | Managed | True | | |
| _₩ | Adjust your org | ₩ Fields ₩ Keys ₩ 1:N Relationships | Accounts: Responded to Camp | o Public View | Managed | True | | |
| | | N:1 Relationships N:N Relationshi | Vendors | Public View | Managed | True | | |
| | | Messages | Account List Member View | Associated View | Managed | True | Displays inform | nat |
| | | Hierarchy Setti | My Connections | Public View | Managed | True | Shows all activ | /e i |
| | | Account Project Pri | Account Lookup View | Lookup View | Managed | True | | |

4) In that click on 'Custom Controls' \rightarrow 'Add Control'.

| a caonite.crm8.dynamics.com/te | ools/solution/edit.aspx?id=%7bfd140aaf-4df4-11dd-bd17-0019b93122389 | 67d# |
|---|---|-------------------------------|
| PowerApps | | |
| • | View: All Accounts - Microsoft Dynamics 365 - Google Chrome | - • × |
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| 🐉 Inform | | <u>^</u> |
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| ⊿ ₽ | Read-only Grid (default) | $\leftarrow \rightarrow$ |
| | Add Control | |
| | | Custom Controls |
| | | Configure Sorting |
| | | Add Columns |
| | | Can Change Properties nformat |
| • | | Remove |
| | | active i |
| Image: Second state state Image: Second | Select or add a custom control to see its configuration. | • |
| | OK | Accoun 🗸 |
| ⊳ Z | | |
| Actual Data Export (| 1 - 22 of 22 (1 selected) | Page 1 |
| Address | | |

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' \rightarrow Click on 'Add'.

| • | View: All Accounts - Microsoft Dynamics 365 - Google Chro | ime – 🗆 🗙 |
|--|--|------------------------------|
| a caonite.crm8.dynami | cs.com/tools/vieweditor/viewManager.aspx?id=%7b65FFAF9A-E8C5- | -432D-860B-32F841B00D87% |
| III PowerAp | Custom Controle | |
| File 🔚 📄 Save As | Add Control | X @Heip * |
| View: All Acc | Select a custom control from the field. | n solution: Default Solution |
| Account Name | CC_SimilarCases_GridControl_Name Kanban Board | Common Tasks |
| | Read Only Grid | $\leftarrow \rightarrow$ |
| | Time Entry Grid | ▼ □ View Properties |
| | Kanban Board | Custom Controls |
| | Modes: Types: Grid | Configure Sorting |
| | Types: Grid | Add Columns |
| 4 | Kanban Board is a productivity app that enables organized card-based view of Entity records in home grid. Records are systematically arranged | Change Properties |
| Try New Experience: T Note: When there are to | Ado | |
| | OK Canc | |

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.

| 9 | View: All Accounts - Micro | soft Dyn | amics 3 | 65 - Google | e Chrome | - 🗆 × |
|---|---|-----------|---------|-------------|-------------|------------------------------|
| caonite.crm8.dynamics. | com/tools/vieweditor/viewMa | nager.asp | x?id=%7 | 7b65FFAF9A | -E8C5-432D- | 860B-32F841B00D87% |
| | Custom Controls Set the custom control proper | ties. | | | × | @ <u>H</u> elp ▼ |
| View: All Acco | | | | | | n solution: Default Solution |
| Account Name | Control | Web | Phone | Tablet | | Common Tasks |
| | Read-only Grid (default) | 0 | 0 | 0 | _ | $\leftarrow \rightarrow$ |
| | Kanban Board | ۲ | ۲ | • > | < | |
| | Add Control | | | | | Custom Controls |
| | Kanban Board | | | | | Configure Sorting |
| | Property Valu | e | | | ^ | 🕂 Add Columns |
| | Kanban Board Grid View | | | | | Change Properties |
| | Lane Filter Criteria * | | | Ø | | Remove |
| Try New Experience: To Note: When there are to | Header * | | | D N | | • |
| | | | | ОК | Cancel | |

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

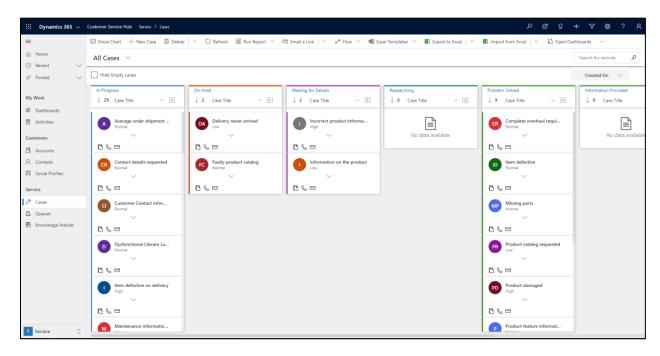
| All Accounts 🛛 🗡 | | Search for records |
|--|----------------------------------|--------------------|
| Hide Empty Lanes | | Created on |
| Active ↓ 48 Account Name ∨ ± | Inactive ↓ 2 Account Name ∨ ⊕ | |
| A. Datum | GI Graphic Design Institute | |
| Adventure Works | FC Fourth Coffee | |
| Alpine Ski House | | |
| BA Blue Yonder Airlines | | |
| CL City Power & Light | | |
| | | |

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.

| PowerApps | better way to customize the system Try New Experience | | | | | |
|--|---|------------------------------------|-----|-------|--------|-------------|
| - | cies 🗄 Solution Layers 🟠 Publish 🚰 Managed Properties | | | | | ⊛ ±€ |
| Case information Solution Default Solution | General Primary Field Controls | | | | | |
| Auto Capture Settin Auto Capture Settin | Control | | Web | Phone | Tablet | |
| b 👌 Batch Job | Read-only Grid (default) | | 0 | ۲ | ۲ | |
| Bookable Resource Bookable Resource | Kanban Board | | ۲ | | | × |
| b 2[®]/₂ Bookable Resource b 4[®]/₂ Bookable Resource b 4[®]/₂ Bookable Resource b 4[®]/₂ Bookable Resource b 4[®]/₂ Bookable Resource | Add Control. | | | | | |
| Bookable Resource Booking Alert Booking Alert Status | Property | Value | | | | |
| Booking Change | Kanban Board Grid Views | | | | | |
| Booking Journal Booking Rule | Lane Filter Criteria + | statuscode (OptionSet) | | | | 0 |
| Booking Setup Met | Header | title (SingleLine.Text) | | | | 0 |
| Booking Status Booking Timestamp | Sub-Header | prioritycode (OptionSet) | | | | 0 |
| Bulk Cloning Job | Body Text 1 | createdon (DateAndTime.DateAndTime | 0 | | | 0 |
| Bulk Migration Job Bulk Migration Job A Business Closure Business Unit | | | | | | |

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.

| III Dynamics 365 🗸 | Customer Service Hub Service > Cases | | | | ନ ସ ହ | + 🏾 🕲 ? |
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| = | 🛱 Show Chart 🕂 New Case 📋 Delete | $ $ \sim \bigcirc Refresh \blacksquare Run Report \sim | Dl) Email a Link 🗸 🖉 Flow 🗸 🖷 Ei | xcel Templates $\ \ \$ 🖪 Export to Excel $\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \$ | 🕼 Import from Excel 🛛 🗸 🚺 Open Di | ashboards ···· |
| | All Cases $~~$ | | | | | Search for records |
| ③ Recent ∨ ☆ Pinned ∨ | Hide Empty Lanes | | | | | Created On \sim |
| My Work | In Progress ↓ 28 Case Title ∨ ⊞ | On Hold ↓ 3 Case Title ∨ া | Waiting for Details ↓ 2 Case Title | Researching ↓ 0 Case Title ∨ ⊞ | Problem Solved ↓ 9 Case Title ∨ ⊞ | Information Provided ↓ 0 Case Title |
| Activities | Average order shipment | Delivery never arrived | Incorrect product informa | No data available. | Complete overhaul requi | No data ava |
| Customers | 660 | 060 | 668 | | 0.0 | |
| 국 Contacts 티 Social Profiles | Normal Norma | ct details requested | Information on the product Low | | Item defective Normal | |
| ervice | 66e 66e | | 0 V B | | C & c | |
| Cases Queues Knowledge Articles | D Dysfunctional Litware La Normal | Fc Faulty product catalog | | | Missing parts Normal | |
| | Item defective on delivery High | 060 | | | Product catalog requested | |
| | C & Maintenance informatio | | | | Product damaged | |

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

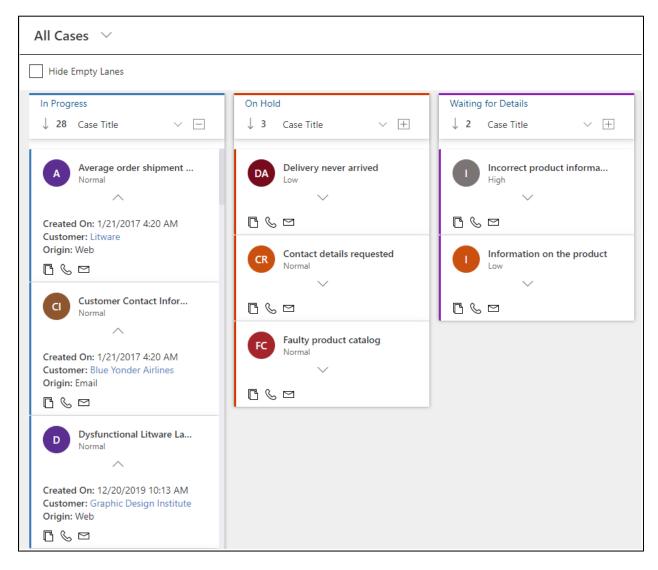
Sub Header Text

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.



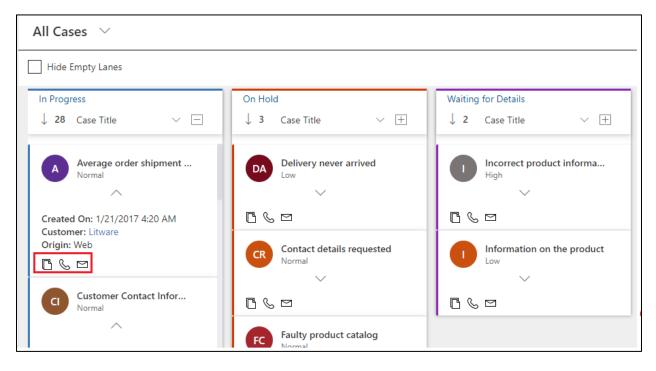
Double-click on the card to open the record form.

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

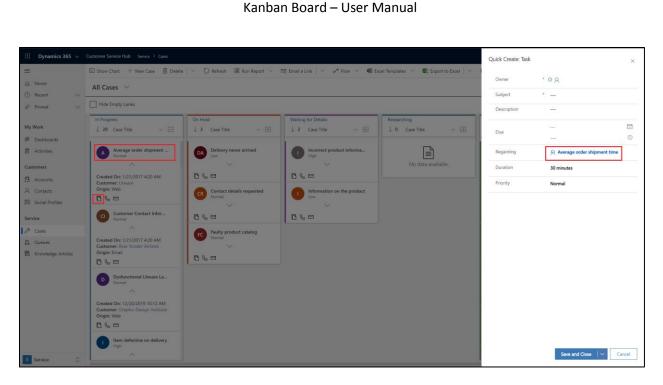
| General Primary Field Controls | | | | |
|--------------------------------|-------------------------------------|-------|--------|---|
| Control | Web | Phone | Tablet | |
| Read-only Grid (default) | ۲ | ۲ | ۲ | |
| Kanban Board | ۲ | | | × |
| Add Control | | | | |
| | | | | |
| | | | | |
| Kanban Board | | | | |
| Kanban Board Grid Views | | | | |
| Lane Filter Criteria * | statuscode (OptionSet) | | | Ø |
| Header | title (SingleLine.Text) | | | Ø |
| Sub-Header | prioritycode (OptionSet) | | | Ø |
| Body Text 1 | createdon (DateAndTime.DateAndTime) | | | Ø |
| Body Text 2 | customerid (Lookup.Customer) | | | Ø |
| Body Text 3 | caseorigincode (OptionSet) | | | Ø |
| | | | | |
| | | | | |

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



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.

| ormation | | | | | | |
|---|--------------------------------|---------------------------|----------------|-------|--------|---|
| Solution | General Primary Field Controls | | | | | |
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| able Resource able Resource able Resource | Add Control | | | | | |
| able Resource able Resource able Resource | Kanban Board | use (angleurie ieu) | | | | v |
| ng Alert ng Alert Status | Sub-Header | prioritycode (OptionSet) | | | | 0 |
| no Change | Body Text 1 | createdon (DateAndTime | e.DateAndTime) | | | 0 |
| ng Journal ng Rule | Body Text 2 | customerid (Lookup.Cus | tomer) | | | 0 |
| ng Setup Met | Body Text 3 | caseorigincode (OptionS | iet) | | | 0 |
| ng Status ng Timestamp | Activity name(comma separated) | email,task,phonecall (Sin | alel los Text) | | | 0 |

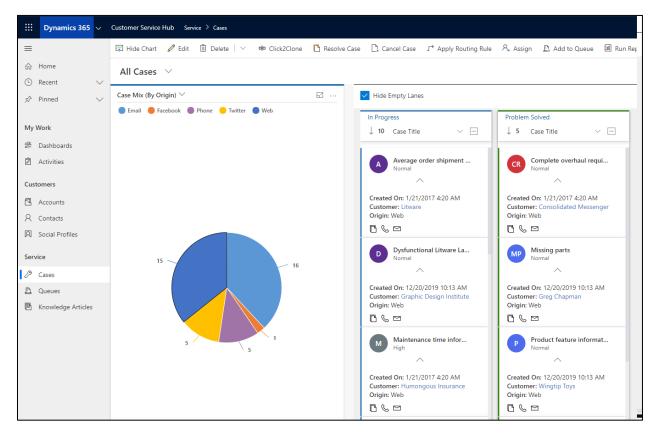
Make sure to type in the schema name of the activity types. You can also choose a custom activity type here.

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.

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|) Home | All Cases $~$ | | | | | Search for records |
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| y Work | In Progress ↓ 28 Case Title ∨ ⊟ | On Hold ↓ 3 Case Title ∨ ± | Waiting for Details ↓ 2 Case Title | Researching ↓ 0 Case Title ∨ ⊞ | Problem Solved ↓ 9 Case Title ~ + | Information Provided ↓ 0 Case Title |
| Activities | Average order shipment | Delivery never arrived | Incorrect product informa | No data available. | Complete overhaul requi | No data ava |
| tomers Accounts Contacts Social Profiles | Created On: 1/21/2017 4:20 AM Custome: Litware Origin: Web | | Assign to Team or User You have selected 1 item. To whom would you like assign To User or team | × | C & E | |
| vice | Customer Contact Infor | 6 % a | User or team | | 0.0 | |
| Cases Queues | Created On: 1/21/2017 4:20 AM Customer: Blue Yonder Airlines | For Faulty product catalog Normal | Assign Can | cel | Missing parts Normal | |
| Knowledge Articles | Origin: Email | 668 | | | 660 | |

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.

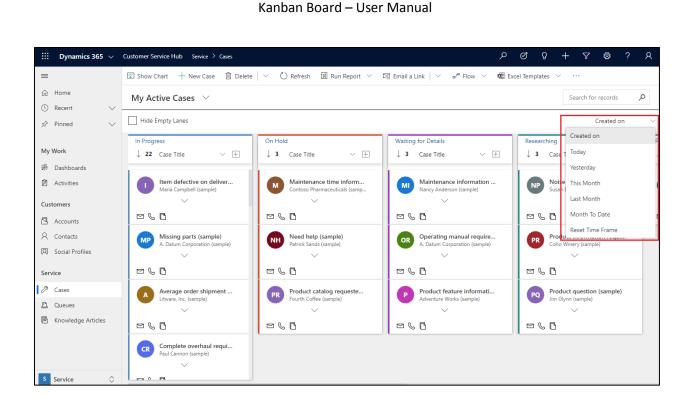
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| S ² Pinned ∨ | Z Hide Empty Lanes | Created On 🛛 🗸 |
| My Work 중 Dashboards 团 Activities | In Progress | |
| Customers | Created Ore: 1/21/2017 4:20 AM | |
| A Contacts | Customer: Unare Origin: Velo | |

7. 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.

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| 변후 Dashboards | Case Title | |
| Activities | A Priority | |
| Customers | Created On | No data available. |
| Accounts | Customer | |
| A Contacts | Origin | |
| R Social Profiles | | |
| Service | | |
| 🖉 Cases | Maintenance time infor | |
| 凸 Queues | High | |
| Knowledge Articles | | |

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



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