

Kanban Board

Card-based Kanban view
for Dynamics 365 CRM &
PowerApps



Kanban Board

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Key Features

Kanban View

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

Drag and Drop Cards

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

Compact Card View

The records in the Kanban View are represented as compact cards. Ability to configure the information displayed in the card

Configure Quick Actions

Cards can be configured to support creating of activity records like phone call, email, appointment etc.

Context Aware

Perform any action from the ribbon bar by selecting the cards as you would in the traditional view upon selecting a record.

Sort and Filter lists

Ability to sort the records and filter them by date created.

Available For

SUPPORTED VERSIONS

- MICROSOFT DYNAMICS 365 v9.x and above

DEPLOYMENTS

- DYNAMICS 365 ONLINE

PCF Control

The screenshot displays the Microsoft Dynamics 365 PowerApps solution editor interface. The left sidebar shows the 'Solution Default Solution' tree with 'Account' selected. The main area is titled 'Solution: Default Solution - Microsoft Dynamics 365 - Google Chrome' and shows the 'Controls' tab for the 'Account' entity. The 'Controls' tab is active, showing a table of controls for Web, Phone, and Tablet views. The 'Kanban Board' control is selected, and its configuration is shown below.

Control Selection Table:

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

[Add Control...](#)

Kanban Board Configuration:

Control	Field	Action
Kanban Board Grid View		
Lane Filter Criteria *	preferredcontactmethodcode (OptionSet)	
Header *	name (SingleLine.Text)	
Sub-Header	createdon (DateAndTime.DateAndTime)	
Body Text 1	emailaddress1 (SingleLine.Email)	
Body Text 2	telephone1 (SingleLine.Phone)	

Kanban View

Dynamics 365

Customer Service Hub

Service > Cases

Home

Recent

Pinned

My Work

Dashboards

Activities

Customers

Accounts

Contacts

Social Profiles

Service

Cases

Queues

Knowledge Articles

Show Chart

New Case

Delete

Refresh

Run Report

Email a Link

Flow

Excel Templates

Export to Excel

Import from Excel

Open Dashboards

All Cases

Search for records

Hide Empty Lanes

Created On

In Progress

29

Case Title

DA

Delivery never arrived

Low

FC

Faulty product catalog

Normal

CI

Customer Contact Infor...

Normal

D

Dysfunctional Litware La...

Normal

I

Item defective on delivery

High

M

Maintenance informatio...

Low

On Hold

2

Case Title

DA

Delivery never arrived

Low

FC

Faulty product catalog

Normal

Waiting for Details

2

Case Title

I

Incorrect product informa...

High

I

Information on the product

Low

Researching

0

Case Title

No data available.

Problem Solved

9

Case Title

CR

Complete overhaul requi...

Normal

ID

Item defective

Normal

MP

Missing parts

Normal

PR

Product catalog requested

Low

PD

Product damaged

High

P

Product feature informat...


Normal

Information Provided


0

Case Title

No data available.

 Kanban Board

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 innovative logic
inogic

Drag and Drop Cards

The screenshot displays the Dynamics 365 Customer Service Hub interface, specifically the 'Cases' view. The top navigation bar shows 'Dynamics 365', 'Customer Service Hub', and 'Service > Cases'. The left sidebar contains navigation options: 'Home', 'Recent', 'Pinned', 'My Work', 'Dashboards', 'Activities', 'Customers', 'Accounts', 'Contacts', 'Social Profiles', 'Service', 'Cases', 'Queues', and 'Knowledge Articles'. The main area shows a Kanban board with columns for 'In Progress' (28 cases), 'On Hold' (3 cases), 'Waiting for Details' (2 cases), 'Researching' (0 cases), 'Problem Solved' (9 cases), and 'Information Provided' (0 cases). Each column contains cards representing individual cases, such as 'Average order shipment ...', 'Delivery never arrived', 'Incorrect product informa...', 'Information on the product', 'Complete overhaul requi...', 'Item defective', 'Missing parts', 'Product catalog requested', and 'Product damaged'. A context menu is open over the 'Contact details requested' card, showing options like 'View', 'Edit', 'Delete', 'Duplicate', 'Share', 'Print', and 'Add to Favorites'.

Compact Card View

All Cases ▾

☐ Hide Empty Lanes

In Progress ↓ 28 Case Title ▾ ☰	On Hold ↓ 3 Case Title ▾ ☰	Waiting for Details ↓ 2 Case Title ▾ ☰
<div><div>A</div><div>Average order shipment ... Normal</div><div>^</div><div>Created On: 1/21/2017 4:20 AM Customer: Litware Origin: Web</div><div>📄 📞 ✉</div></div>	<div><div>DA</div><div>Delivery never arrived Low</div><div>▽</div><div>📄 📞 ✉</div></div> <div><div>CR</div><div>Contact details requested Normal</div><div>▽</div><div>📄 📞 ✉</div></div> <div><div>FC</div><div>Faulty product catalog Normal</div><div>▽</div><div>📄 📞 ✉</div></div>	<div><div>I</div><div>Incorrect product informa... High</div><div>▽</div><div>📄 📞 ✉</div></div> <div><div>I</div><div>Information on the product Low</div><div>▽</div><div>📄 📞 ✉</div></div>

Contextual actions to create activities

All Cases ▾

☐ Hide Empty Lanes

In Progress	On Hold	Waiting for Details
↓ 28 Case Title ▾ □	↓ 3 Case Title ▾ □	↓ 2 Case Title ▾ □
<div><div>A</div><div>Average order shipment ... Normal</div><div>^</div><div>Created On: 1/21/2017 4:20 AM Customer: Litware Origin: Web</div><div><div>📄 📞 ✉</div></div></div>	<div><div>DA</div><div>Delivery never arrived Low</div><div>▽</div><div><div>📄 📞 ✉</div></div></div> <div><div>CR</div><div>Contact details requested Normal</div><div>▽</div><div><div>📄 📞 ✉</div></div></div> <div><div>FC</div><div>Faulty product catalog Normal</div></div>	<div><div>I</div><div>Incorrect product informa... High</div><div>▽</div><div><div>📄 📞 ✉</div></div></div> <div><div>I</div><div>Information on the product Low</div><div>▽</div><div><div>📄 📞 ✉</div></div></div>

Context Aware

The screenshot displays the Microsoft Dynamics 365 Customer Service Hub interface. The top navigation bar shows 'Dynamics 365' and 'Customer Service Hub'. The main area is a Kanban board titled 'All Cases' with columns for 'In Progress', 'On Hold', 'Waiting for Details', 'Researching', 'Problem Solved', and 'Information Provided'. A red box highlights a case card in the 'In Progress' column titled 'Average order shipment ...'. A context-aware 'Assign' dialog box is open over this card, asking 'You have selected 1 item. To whom would you like to assign it?'. The dialog has a table with columns 'Assign To' and 'User or team', and buttons for 'Assign' and 'Cancel'. The background interface includes a left sidebar with navigation options like 'Home', 'Recent', 'Pinned', 'My Work', 'Dashboards', 'Activities', 'Customers', 'Accounts', 'Contacts', 'Social Profiles', 'Service', 'Cases', 'Queues', and 'Knowledge Articles'. The top right of the interface has a search bar and various utility icons.

Search Records

The screenshot shows the Microsoft Dynamics 365 interface. The top navigation bar includes 'Dynamics 365', 'Sales Hub', and 'Sales > Accounts'. The search bar at the top right contains the text 'tailspin'. Below the search bar, the 'Search Results' section is visible, with a 'Hide Empty Lanes' checkbox checked. The results are organized into two columns: 'Any' and 'Email'. The 'Any' column shows three results: 'Tailspin Toys Electronics' (created 12-11-2019 07:28), 'Tailspin Toys Fabrication' (created 12-11-2019 07:28), and 'Tailspin Toys Instrumen...' (created 12-11-2019 07:28). The 'Email' column shows one result: 'Tailspin Toys' (created 21-01-2017 04:09). Each result card includes a circular icon with initials, the name, the creation date, and icons for email, phone, and document.

Dynamics 365 Sales Hub Sales > Accounts

Search Results

tailspin

Hide Empty Lanes

Any

↓ 4 Account Name

TE Tailspin Toys Electronics
12-11-2019 07:28

TF Tailspin Toys Fabrication
12-11-2019 07:28

TI Tailspin Toys Instrumen...
12-11-2019 07:28

Email

↓ 1 Account Name

TT Tailspin Toys
21-01-2017 04:09

Sort Cards

The screenshot displays the Dynamics 365 Customer Service Hub interface for the 'Cases' view. The top navigation bar includes 'Dynamics 365', 'Customer Service Hub', and 'Service > Cases'. Below this, a toolbar offers actions like 'Show Chart', 'New Case', 'Edit', 'Delete', 'Refresh', and 'Click2Clone'. The main area is titled 'All Cases' and features a 'Hide Empty Lanes' checkbox. The Kanban board consists of two lanes: 'In Progress' and 'On Hold'. The 'In Progress' lane has a count of 10 and a sorting dropdown menu that is currently open, showing options: 'Case Title', 'Case Title', 'Priority', 'Created On', 'Customer', and 'Origin'. The 'On Hold' lane has a count of 0 and displays 'No data available.' A tooltip labeled 'On Hold' is visible above the 'On Hold' lane header.

Next Steps

Learn more about [Kanban Board](#) today.

Get your free **Kanban Board** trial from [Microsoft AppSource](#) or [our website](#)!

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