

# Kanban Board

Card-based Kanban view  
for Dynamics 365 CRM



**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.

## BPF Support

Support to organize and categorize records of a given entity in Kanban view as per the Business Process Flow defined for that entity

## Row Grouping

Support to categorize and group records in row on the basis of selected field value such as priority – High, Normal, Low.

## Configure Quick Actions

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

## 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



# Key Features

## Search

Support for search through native quick search available for views in CRM

## 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 v9.1 onwards
- Dataverse (Power Apps)

## DEPLOYMENTS

- DYNAMICS 365 ONLINE

# PCF Control

The screenshot shows the 'PCF Control' configuration window. The left sidebar displays a tree view of entities, with 'Account' selected under 'Solution Default Solution'. The main area has three tabs: 'General', 'Primary Field', and 'Controls'. The 'Controls' tab is active, showing a table of controls for different devices.

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**  
Kanban Board Grid View

Control	Field	Action
Lane Filter Criteria *	preferredcontactmethodcode (OptionSet)	
Row Filter Criteria	donotbulkemail (TwoOptions)	
Header	name (SingleLine.Text)	
Sub-Header	createdon (DateAndTime.DateAndTime)	
Body Text 1	emailaddress1 (SingleLine.Email)	
Body Text 2	primarycontactid (Lookup.Simple)	

Body Text 2  
Compatible types: Currency, DateAndTime.DateAndTime, DateAndTime.DateOnly, FP, Decimal, SingleLine.Email, 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

S

Service

Show Chart

New Case

Delete

Refresh

Run Report

Email a Link

Flow

Excel Templates

All Cases

Hide Empty Lanes

Business Process Flow

Created On

In Progress

91

Case Title

On Hold

3

Case Title

Waiting for Details

2

Case Title

Researching

3

Case Title

A

Average order shipment ...

02-08-2020 16:00

CR

Contact information requ...

31-07-2020 09:00

DS

Damaged during shipme...

I

Item defective on deliver...

02-08-2020 09:00

NP

Noise from product (sam...

03-08-2020 00:00

S

Shipping time informati...

CR

Contact information requi...

03-08-2020 00:00

M

Maintenance time inform...

03-08-2020 00:00

CR

Complete overhaul requi...

02-08-2020 10:00

PD

Product damaged (samp...

01-08-2020 10:00

7C

Zack Case

1 - 100 of 100 (0 selected)

Page 1

# BPF Support – Pin BPF for Global or Personal use

The screenshot displays the Dynamics 365 Sales Professional interface with a Kanban board titled 'All Opportunities'. The board is organized into columns: 'Qualify' (35 items), 'New Stage' (1 item), 'Develop' (9 items), and 'Propose' (3 items). A context menu is open over the 'New Stage' column, showing options: 'Select Business Process Flow', 'Sales Person BPF', 'Custom Opportunity Proce...', 'Opportunity Sales Process' (highlighted with a green box), and 'Switch to Default Board'. The left sidebar shows navigation options like Home, Recent, Pinned, My Work, Dashboards, Activities, Customers, Accounts, Contacts, Sales, Leads, and Opportunities. The top bar includes various action buttons like Show Chart, New, Delete, Refresh, Email a Link, Flow, Run Report, Excel Templates, and Export to Excel.

# Row Grouping

**Row Grouping based on optionset field**

**Row Grouping based on non-optionset field**

**Row Grouping based on optionset field**

**Row Grouping based on non-optionset field**



# Drag and Drop Cards

**Dynamics 365** Customer Service Hub Service > Cases

Search this view

**All Cases**

☐ Hide Empty Lanes

Business Process Flow

Created On

In Progress	On Hold	Waiting for Details	Researching
91 Case Title	2 Case Title	3 Case Title	3 Case Title
<div>Average order shipment ... 02-08-2020 16:00</div>	<div>Item defective on deliver... 02-08-2020 09:00</div>	<div>Contact information req... 02-08-2020 00:00</div>	<div>Complete overhaul requi... 02-08-2020 10:00</div>
<div>Contact information req... 31-07-2020 09:00</div>	<div>Noise from 03-08-2020 00:00</div>	<div>Maintenance time infor... 03-08-2020 00:00</div>	<div>Product damaged (samp... 01-08-2020 10:00</div>
<div>Damaged during shipme... 03-08-2020 00:00</div>	<div>Shipping time informati... 03-08-2020 00:00</div>		<div>Zack Case</div>

1 - 100 of 100 (0 selected)

Page 1

# Compact Card View

All Cases ▾

☐ Hide Empty Lanes

Business Process Flow ▾

In Progress

↓ 91 Case Title ▾ +

A

Average order shipment ...  
02-08-2020 16:00

^

Customer: Litware, Inc. (sample)...

Origin: Web

Owner: Joe Potter

☎ 📄 ✉

CR

Contact information requi...  
31-07-2020 09:00

▽

On Hold

↓ 3 Case Title ▾ +

I

Item defective on deliver...  
02-08-2020 09:00

▽

☎ 📄 ✉

NP

Noise from product (sam...  
03-08-2020 00:00

▽

☎ 📄 ✉

S

Shipping time informati...

Waiting for Details

↓ 2 Case Title ▾ +

CR

Contact information requi...  
03-08-2020 00:00

▽

☎ 📄 ✉

M

Maintenance time inform...  
03-08-2020 00:00

▽

☎ 📄 ✉

1 - 100 of 100 (0 selected)

# Contextual actions to create activities

All Cases ▾

☐ Hide Empty Lanes Business Process Flow

In Progress

↓ 91 Case Title ▾ +

A

Average order shipment ...  
02-08-2020 16:00

^

Customer: Litware, Inc. (sample)...

Origin: Web

Owner: Joe Potter

☎

📄

✉

CR

Contact information req...  
31-07-2020 09:00

▽

On Hold

↓ 3 Case Title ▾ +

I

Item defective on deliver...  
02-08-2020 09:00

▽

☎

📄

✉

NP

Noise from product (sam...  
03-08-2020 00:00

▽

☎


📄

✉


S

Shipping time informati...

1 - 100 of 100 (0 selected)

 Kanban Board

[crm@inogic.com](mailto:crm@inogic.com)

 innovative logic  
**inogic**

# 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' (91 cases), 'Details', and 'Researching' (3 cases). A specific case, 'Average order shipment ...', is highlighted in the 'In Progress' column. A modal dialog titled 'Assign to Team or User' is open, asking 'You have selected 1 item. To whom would you like to assign it?'. The modal has a table with columns 'Assign To' and 'User or team', and a 'User or team' input field. The 'Assign' button is highlighted in green in the background toolbar.

**Assign to Team or User**

You have selected 1 item. To whom would you like to assign it?

Assign To	User or team
User or team	---

**Assign** **Cancel**



# Search Records

Dynamics 365 Customer Service Hub Service > Cases

Search: Average order

All Cases

Hide Empty Lanes

Business Process Flow

Created On

**In Progress** ↓ 1 Case Title

Average order shipment ti...  
02-08-2020 16:00

**On Hold** ↓ 0 Case Title

No data available.

**Waiting for Details** ↓ 0 Case Title

No data available.

**Researching** ↓ 0 Case Title

No data available.

1 - 1 of 1 (0 selected) Page 1

# Sort Cards

The screenshot displays the Inogic CRM interface, specifically the Kanban Board for 'Cases'. The left sidebar contains navigation links: Home, Recent, Pinned, My Work, Dashboards, Activities, Customers (Accounts, Contacts, Social Profiles), and Service (Cases, Service). The top bar includes 'Show Chart', 'New Case', 'Delete', and 'Refresh' buttons. The main area is titled 'All Cases' and features a 'Hide Empty Lanes' checkbox. Two columns are visible: 'In Progress' and 'On Hold'. The 'In Progress' column has a card with a green border and a dropdown menu open, showing sorting options: Case Title, Created On, Customer, Origin, and Owner. The 'On Hold' column has a card with a purple border. The bottom status bar shows '1 - 100 of 100 (0 selected)'.

Navigation: Home, Recent, Pinned, My Work, Dashboards, Activities, Customers (Accounts, Contacts, Social Profiles), Service (Cases, Service)

Top Bar: Show Chart, New Case, Delete, Refresh

Section: All Cases

Hide Empty Lanes

Columns: In Progress, On Hold

Sorting Options (for 'In Progress' column): Case Title, Created On, Customer, Origin, Owner

Status Bar: 1 - 100 of 100 (0 selected)

# Next Steps

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

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

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