





Key Features

Kanban View

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

Configure Quick Actions

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

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

Drag and Drop Cards

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

Row Grouping

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

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)

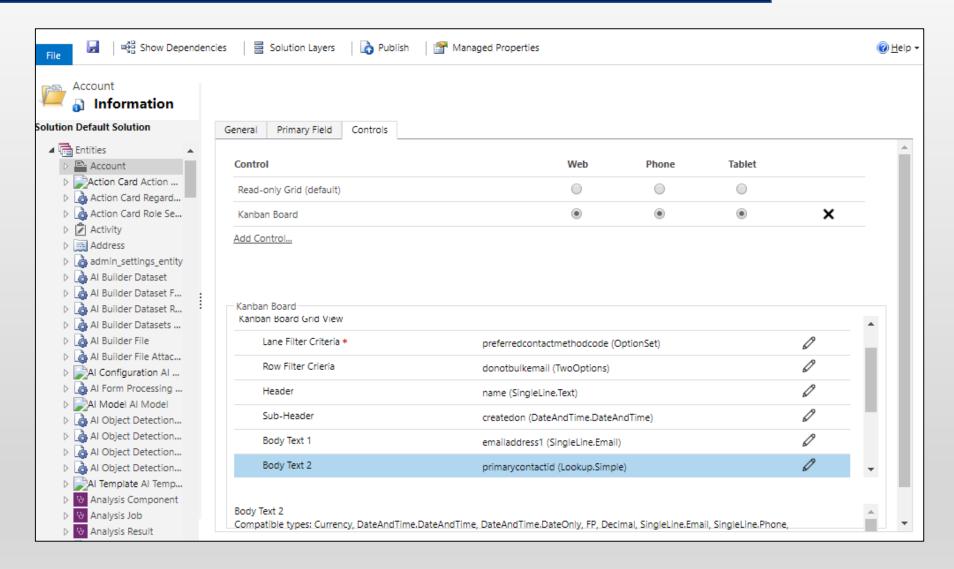
DEPLOYMENTS

DYNAMICS 365 ONLINE



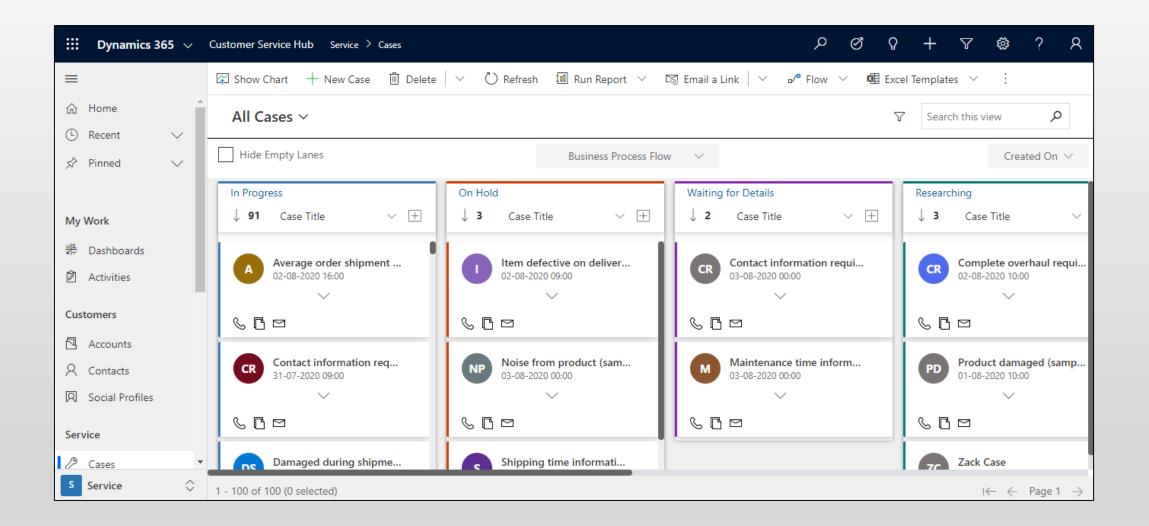


PCF Control





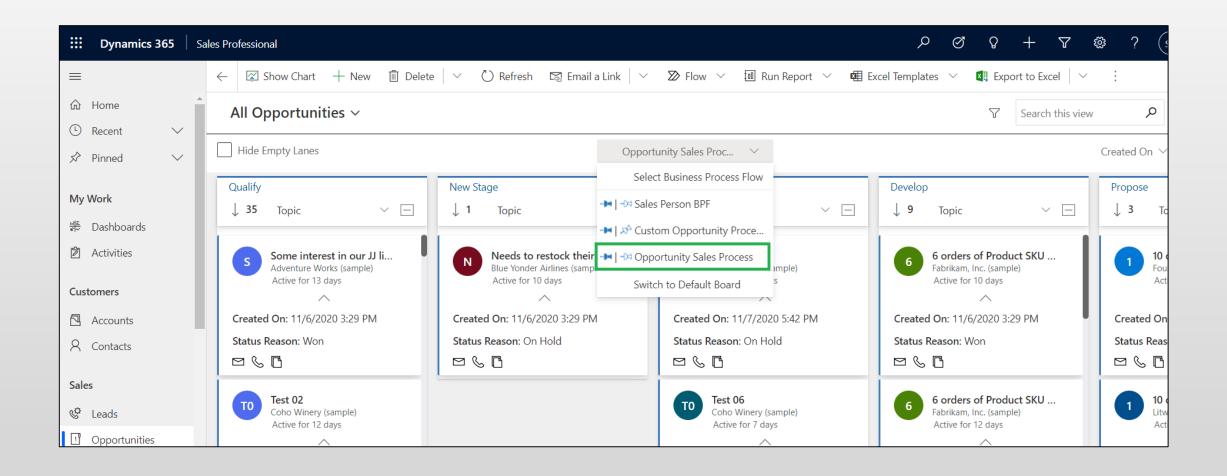
Kanban View







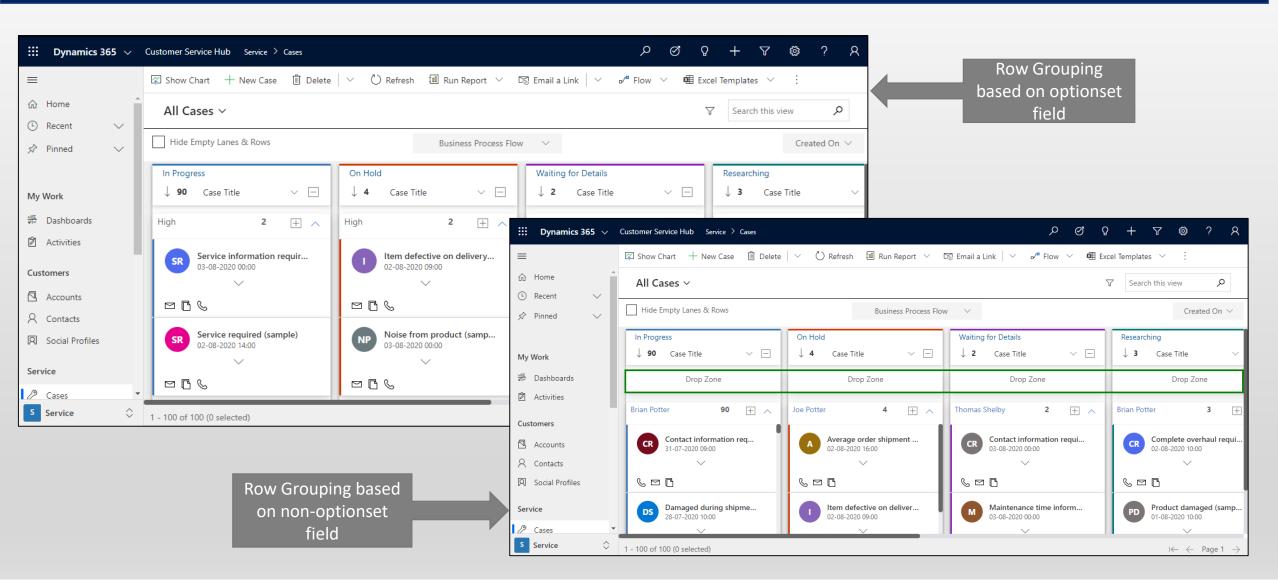
BPF Support – Pin BPF for Global or Personal use







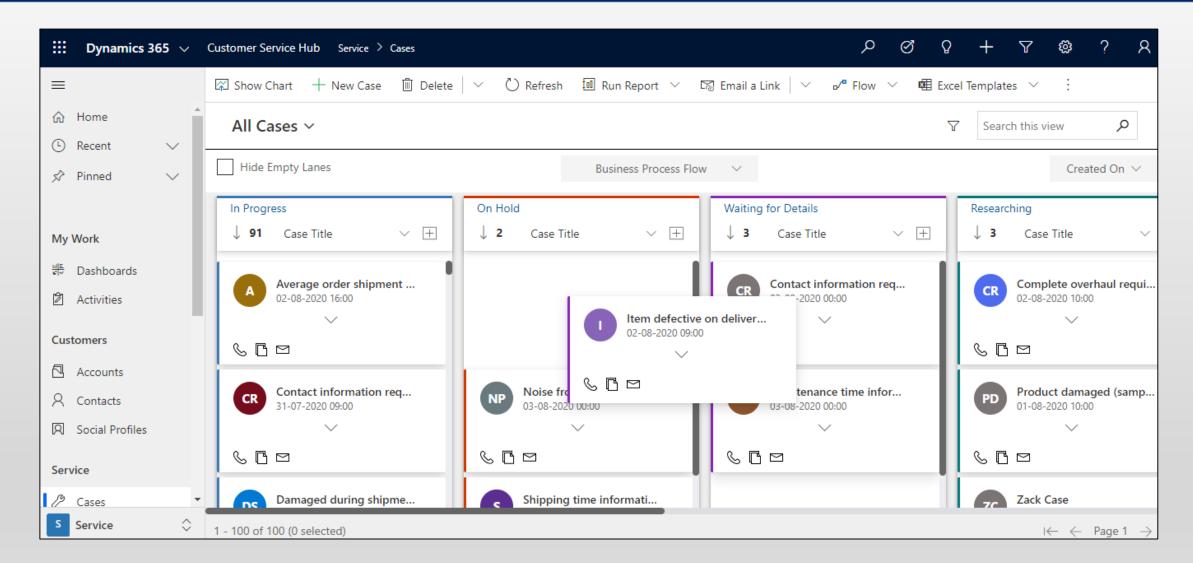
Row Grouping







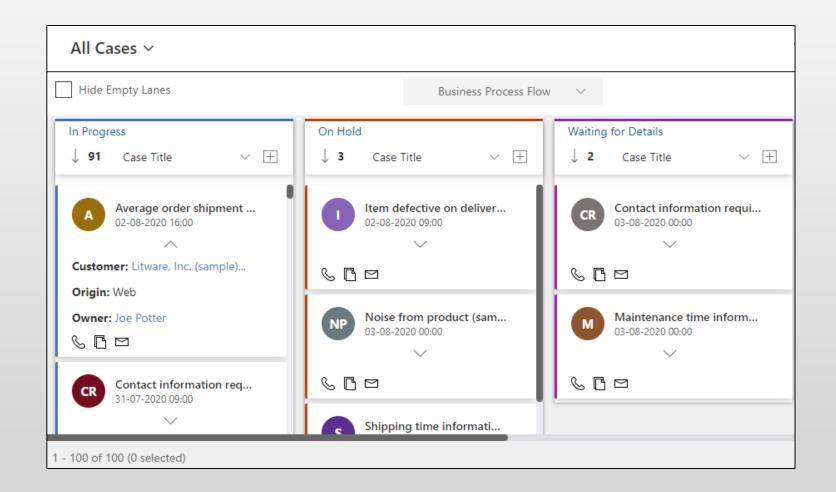
Drag and Drop Cards





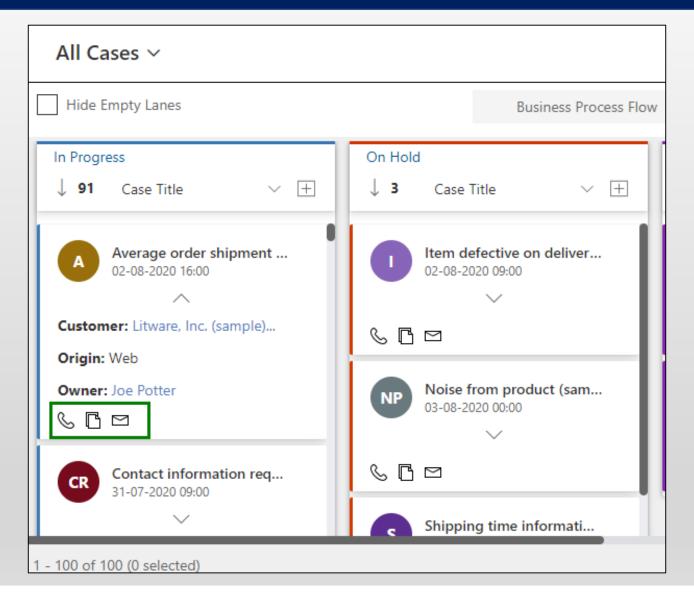


Compact Card View



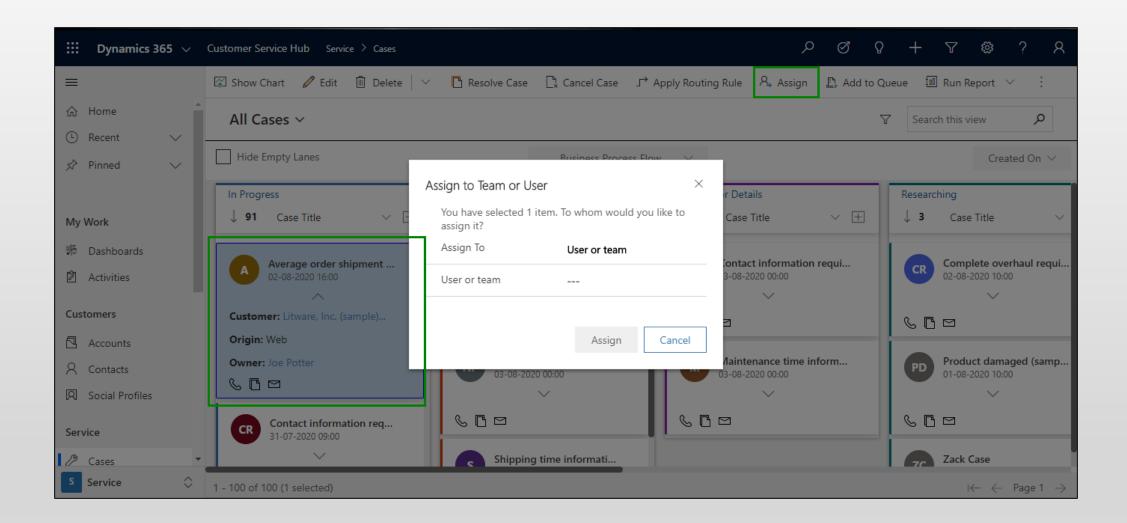


Contextual actions to create activities





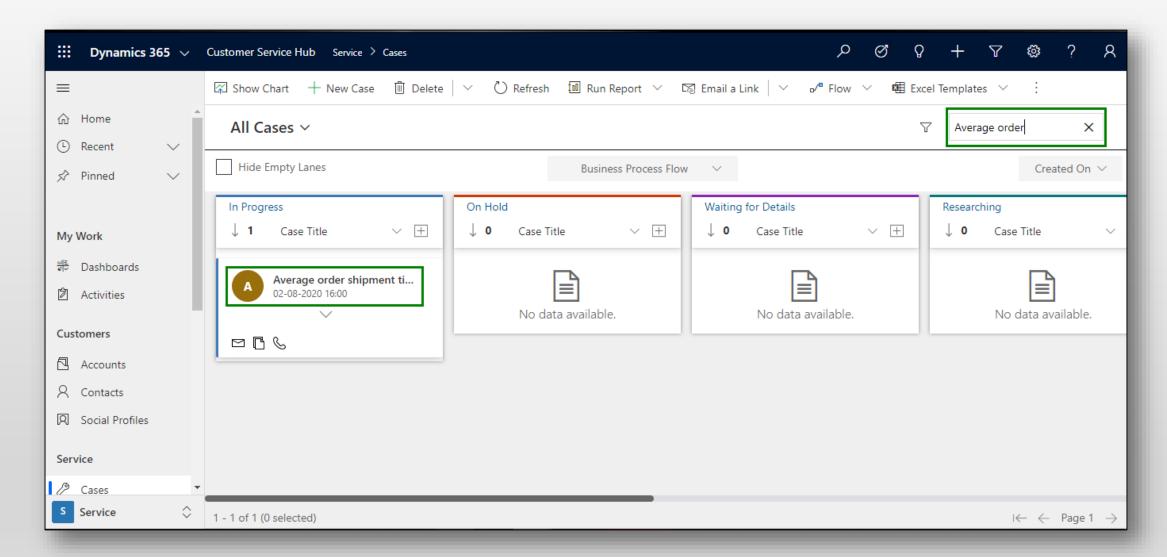
Context Aware







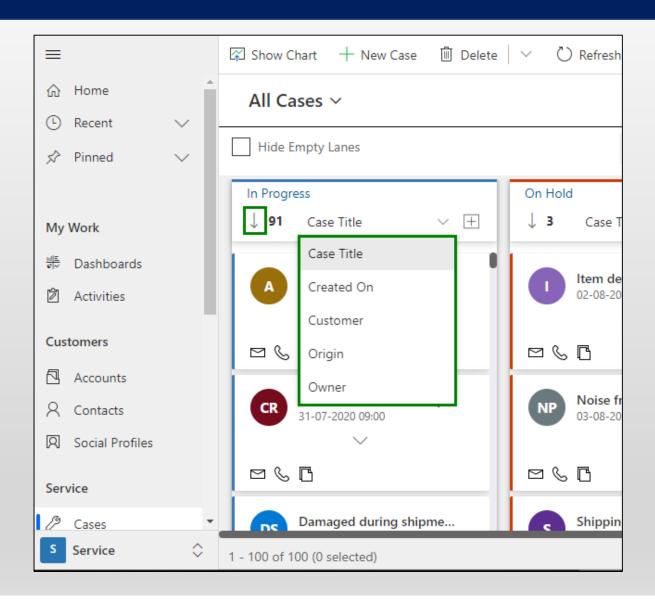
Search Records







Sort Cards





Next Steps

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Board today.

Get your free **Kanban Board** trial from Microsoft AppSource or our website!

Email: crm@inogic.com





