



Kanban Board

Card-based Kanban view
for Dynamics 365 CRM

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 Microsoft Dynamics 365 PCF Control configuration interface. The left sidebar displays the 'Account' entity under 'Information' and 'Solution Default Solution'. The main area is divided into 'General', 'Primary Field', and 'Controls' tabs. 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"/>	X
Add Control...				

Below the table, the configuration for the selected 'Kanban Board' control is shown. It includes a 'Kanban Board Grid View' section with the following details:

Property	Value	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)	

At the bottom, the 'Body Text 2' section is expanded, showing 'Compatible types: Currency, DateAndTime.DateAndTime, DateAndTime.DateOnly, FP, Decimal, SingleLine.Email, SingleLine.Phone,'.

Kanban View

The screenshot displays the Dynamics 365 interface for the 'Customer Service Hub' in the 'Cases' view. The top navigation bar includes 'Dynamics 365', 'Customer Service Hub', and 'Service > Cases'. The main area is titled 'All Cases' and features a search bar and a 'Business Process Flow' dropdown. The Kanban board is organized into four lanes: 'In Progress' (91 cases), 'On Hold' (3 cases), 'Waiting for Details' (2 cases), and 'Researching' (3 cases). Each lane contains case cards with details such as status, title, and date. The left sidebar shows navigation options like 'Home', 'Recent', 'Pinned', and 'My Work'. The bottom status bar indicates '1 - 100 of 100 (0 selected)' and 'Page 1'.

BPF Support – Pin BPF for Global or Personal use

The screenshot displays the Dynamics 365 Sales Professional interface. The main view is a Kanban board titled "All Opportunities" with columns for "Qualify", "New Stage", "Develop", and "Propose". A context menu is open over a card in the "New Stage" column, showing options to "Select Business Process Flow". The menu items are:

- Select Business Process Flow
- Sales Person BPF
- Custom Opportunity Proce...
- Opportunity Sales Process** (highlighted with a green box)
- Switch to Default Board

The interface also shows a left-hand navigation pane with sections for "My Work", "Customers", and "Sales". The top navigation bar includes various actions like "Show Chart", "New", "Delete", "Refresh", "Email a Link", "Flow", "Run Report", "Excel Templates", and "Export to Excel".

Row Grouping

The image displays two screenshots of the Dynamics 365 Customer Service Hub interface, illustrating row grouping in a Kanban board view for the 'Cases' entity.

Left Screenshot: Row Grouping based on optionset field

This view shows cases grouped by the 'Created On' field, which is an optionset. The board is divided into four lanes: 'In Progress' (90 cases), 'On Hold' (4 cases), 'Waiting for Details' (2 cases), and 'Researching' (3 cases). Each lane contains a 'High' priority group with 2 cases. The cases are grouped by their 'Created On' date and time.

Right Screenshot: Row Grouping based on non-optionset field

This view shows cases grouped by the 'Case Title' field, which is a non-optionset field. The board is divided into four lanes: 'In Progress' (90 cases), 'On Hold' (4 cases), 'Waiting for Details' (2 cases), and 'Researching' (3 cases). Each lane contains a 'Drop Zone' and a group of cases. The cases are grouped by their 'Case Title'.

Annotations:

- An arrow points to the 'Created On' field in the top right of the left screenshot, with the text: "Row Grouping based on optionset field".
- An arrow points to the 'Case Title' field in the top right of the right screenshot, with the text: "Row Grouping based on non-optionset field".

Drag and Drop Cards

The screenshot displays the Dynamics 365 Customer Service Hub interface. The top navigation bar includes 'Dynamics 365', 'Customer Service Hub', and 'Service > Cases'. A secondary toolbar contains actions like 'Show Chart', 'New Case', 'Delete', 'Refresh', 'Run Report', 'Email a Link', 'Flow', and 'Excel Templates'. The main view is titled 'All Cases' and features a search bar and a 'Hide Empty Lanes' checkbox. The board is organized into four lanes: 'In Progress' (91 cases), 'On Hold' (2 cases), 'Waiting for Details' (3 cases), and 'Researching' (3 cases). Each lane contains case cards with details such as status icons (A, CR, NP, PD, DS), titles, and timestamps. A modal window is open over the 'On Hold' lane, showing a case titled 'Item defective on deliver...'. The bottom of the interface shows a status bar with '1 - 100 of 100 (0 selected)' and a page indicator 'Page 1'.

Compact Card View

All Cases ▾

Hide Empty Lanes

Business Process Flow ▾

In Progress	On Hold	Waiting for Details
↓ 91 Case Title ▾ +	↓ 3 Case Title ▾ +	↓ 2 Case Title ▾ +
<p>A Average order shipment ... 02-08-2020 16:00</p> <p>^</p> <p>Customer: Litware, Inc. (sample)...</p> <p>Origin: Web</p> <p>Owner: Joe Potter</p> <p>☎ 📄 ✉</p>	<p>I Item defective on deliver... 02-08-2020 09:00</p> <p>▽</p> <p>☎ 📄 ✉</p>	<p>CR Contact information requi... 03-08-2020 00:00</p> <p>▽</p> <p>☎ 📄 ✉</p>
<p>CR Contact information req... 31-07-2020 09:00</p> <p>▽</p>	<p>NP Noise from product (sam... 03-08-2020 00:00</p> <p>▽</p> <p>☎ 📄 ✉</p>	<p>M Maintenance time inform... 03-08-2020 00:00</p> <p>▽</p> <p>☎ 📄 ✉</p>
	<p>S Shipping time informati...</p>	

1 - 100 of 100 (0 selected)

Contextual actions to create activities

All Cases ▾

Hide Empty Lanes Business Process Flow

In Progress	On Hold
↓ 91 Case Title ▾ +	↓ 3 Case Title ▾ +
<p>A Average order shipment ... 02-08-2020 16:00</p> <p>^</p> <p>Customer: Litware, Inc. (sample)...</p> <p>Origin: Web</p> <p>Owner: Joe Potter</p> <p>  </p>	<p>I Item defective on deliver... 02-08-2020 09:00</p> <p>▽</p> <p>  </p>
<p>CR Contact information req... 31-07-2020 09:00</p> <p>▽</p>	<p>NP Noise from product (sam... 03-08-2020 00:00</p> <p>▽</p> <p>  </p>
	<p>S Shipping time informati...</p>

1 - 100 of 100 (0 selected)

Context Aware

The screenshot displays the 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), 'Researching' (3 cases), and 'Zack Case'. A specific case card in the 'In Progress' column is highlighted with a green border. This card is titled 'Average order shipment ...' and includes details: 'Customer: Litware, Inc. (sample)...', 'Origin: Web', and 'Owner: Joe Potter'. A white dialog box titled 'Assign to Team or User' is overlaid on the case card. The dialog contains the text: 'You have selected 1 item. To whom would you like to assign it?'. Below this text is a table with two columns: 'Assign To' and 'User or team'. The 'Assign To' column contains a dropdown menu, and the 'User or team' column contains a text input field. At the bottom of the dialog are 'Assign' and 'Cancel' buttons. The background interface includes a left-hand navigation pane with options like 'Home', 'Recent', 'Pinned', 'My Work', 'Dashboards', 'Activities', 'Customers', 'Accounts', 'Contacts', 'Social Profiles', 'Service', and 'Cases'. The top right of the interface features a toolbar with icons for search, refresh, help, and other actions. The 'Assign' button in the toolbar is highlighted with a green box.

Search Records

The screenshot displays the Microsoft Dynamics 365 Customer Service Hub interface. The top navigation bar shows 'Dynamics 365' and 'Customer Service Hub Service > Cases'. The main area is a Kanban board titled 'All Cases' with a search filter 'Average order' applied. The board is divided into four lanes: 'In Progress' (1 case), 'On Hold' (0 cases), 'Waiting for Details' (0 cases), and 'Researching' (0 cases). The 'In Progress' lane contains one card titled 'Average order shipment ti...' with a timestamp of '02-08-2020 16:00'. The other lanes are empty and display 'No data available.' The left sidebar shows navigation options like 'Home', 'Recent', 'Pinned', 'My Work', 'Dashboards', 'Activities', 'Customers', and 'Service'. The bottom status bar indicates '1 - 1 of 1 (0 selected)' and 'Page 1'.

Sort Cards

The screenshot displays a CRM interface with a Kanban board. The left sidebar contains navigation options: Home, Recent, Pinned, My Work, Dashboards, Activities, Customers (Accounts, Contacts, Social Profiles), and Service (Cases, Service). The main area shows a 'Cases' view with columns for 'In Progress' and 'On Hold'. A card in the 'In Progress' column is selected, and a sorting dropdown menu is open, listing 'Case Title', 'Created On', 'Customer', 'Origin', and 'Owner'. The card details include a status of 91, a title 'Case Title', a date '31-07-2020 09:00', and an owner 'CR'. The 'On Hold' column shows 3 cards, including 'Item de' and 'Noise fr'. The bottom status bar indicates '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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