

Kanban Board



White Paper

Aim:

Kanban Board is a productivity app to visualize your Dynamics 365 and Power Apps data in a Kanban View. With the ability to categorize the data into lanes and rows it helps with a quick review of the records in a card-based view and easily identify the status of the records.

Features:

- Kanban Board presents the selected View in a Kanban view for quick access and easy understanding and classification of the data in the view
- Kanban view of records as per Business Process Flow. Allows to pin BPF for Global or Personal use.
- Group records in row on the basis of selected field value
- Supports moving the records around from one lane to another with a quick drag and drop action
- Quick access to important information in a compact card view
- Define quick activity actions for the records
- Works in context of the native CRM environment and responds to all native ribbon actions available for traditional views
- Support for search through native quick search available for views in CRM
- Records in the lanes can be sorted. It also supports filtering of the data in the view by 'CreatedOn' date

Supported Versions

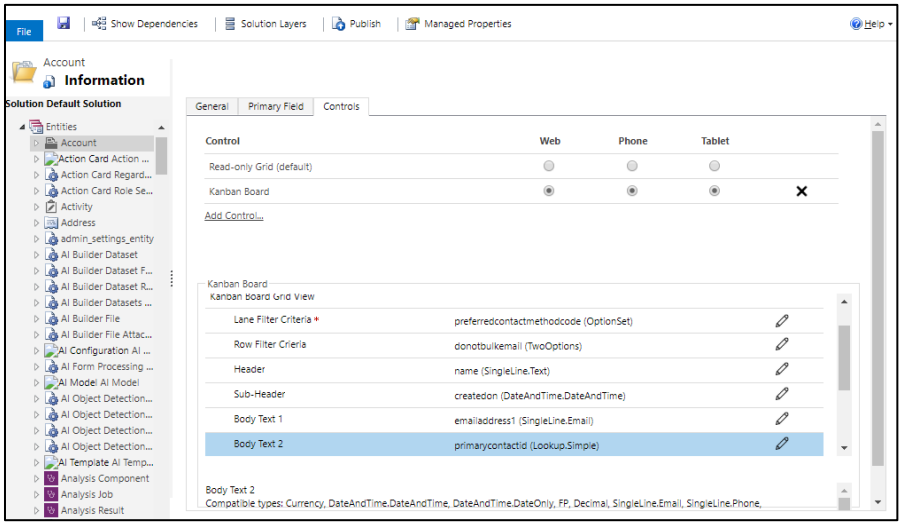
Versions: Microsoft Dynamics 365 v9.1 onwards, Power Apps & CDS.
Deployment Models: Dynamics 365 Online.

Who needs it?

Kanban Board is developed to provide you an organized and systematic view of Entity records in multiple lanes consisting of multiple cards (records). You can further drag and drop records from one lane to another and perform quick actions like Email, Phone Call, Appointment, etc. Finding records easily and filtering them on basis of date saves time and improves efficiency. Thus, with Kanban Board you can provide enhanced view of records and increase productivity of Dynamics 365 CRM users.

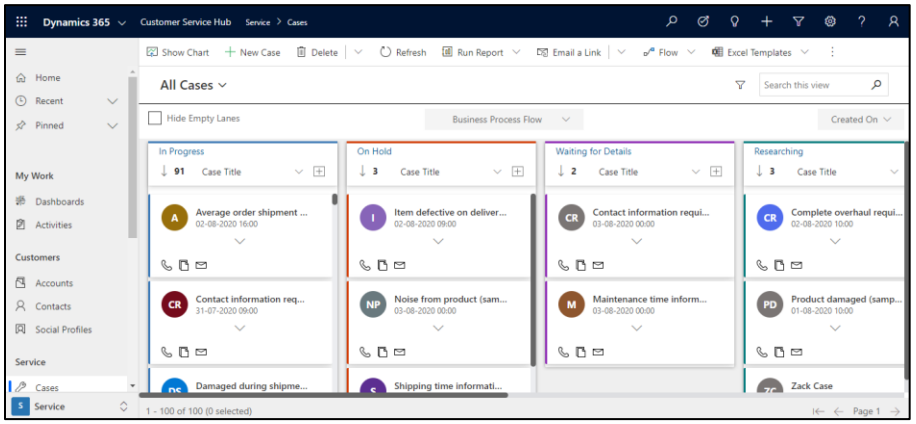
Controls

Setup Kanban Board controls for respective Entities.



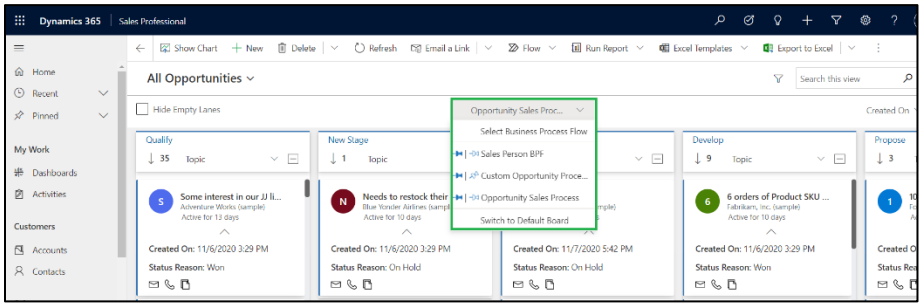
Organized Kanban View

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



BPF Support

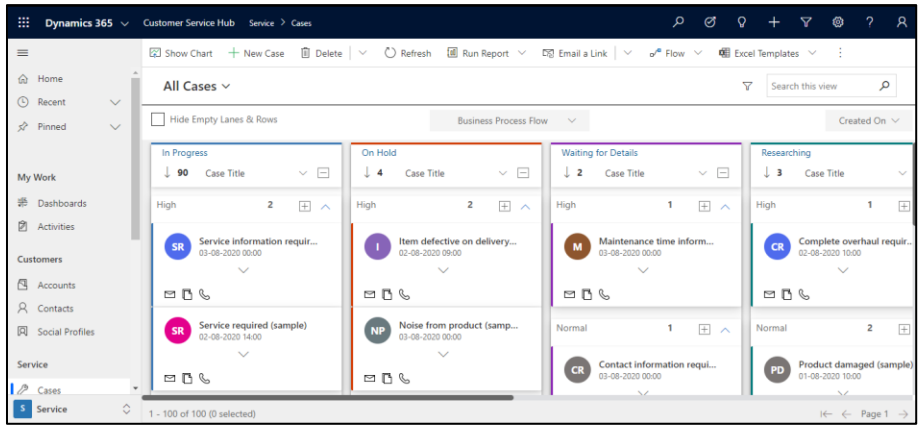
Organize and categorize records of a given entity in Kanban view as per the Business Process Flow defined for that entity. Pins are seen against the BPF to pin the BPF for global or personal use.



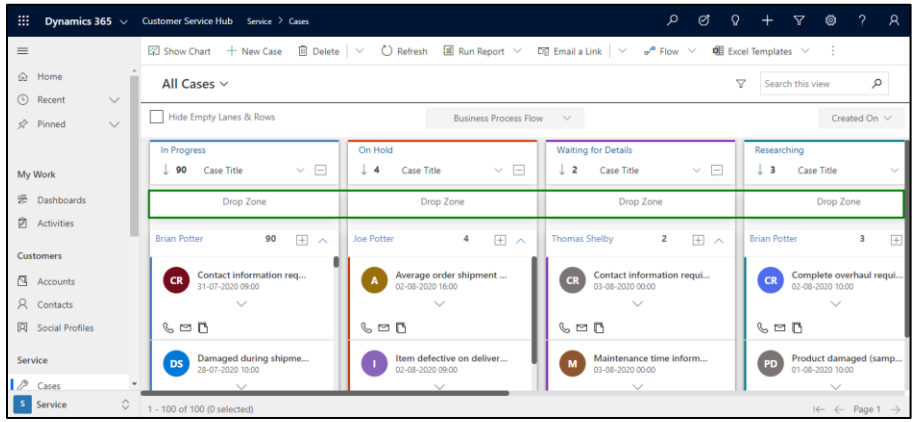
Row Grouping

Categorize and group records in row on the basis of selected field value.

Row Grouping on the basis of OptionSet field, for e.g. Priority.

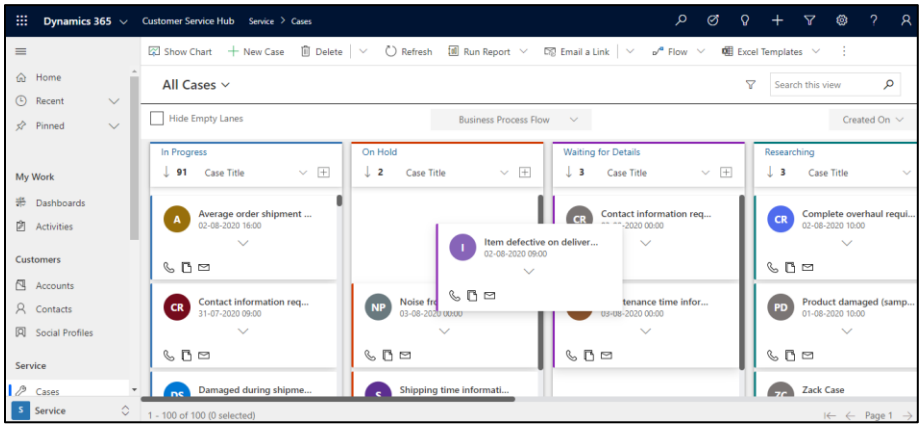


Row Grouping on the basis of Non-OptionSet field, for e.g. Owner.



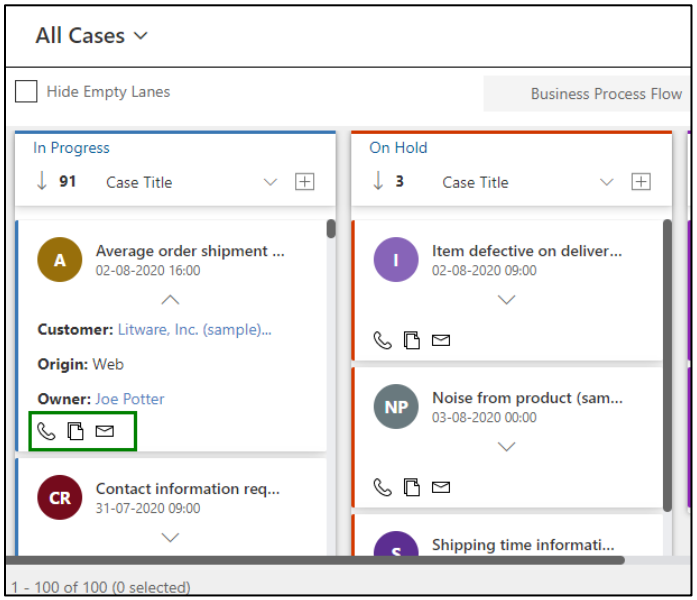
Drag and Drop Cards

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



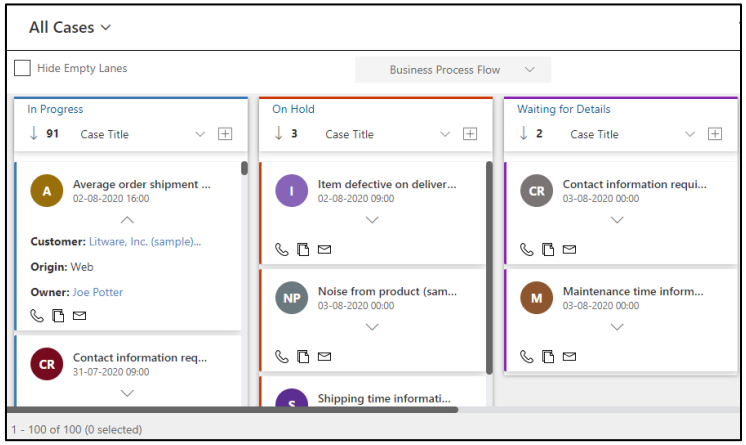
Create Quick Activity Actions

Support to define quick activity actions for the records like Phone Call, Appointment and Task.



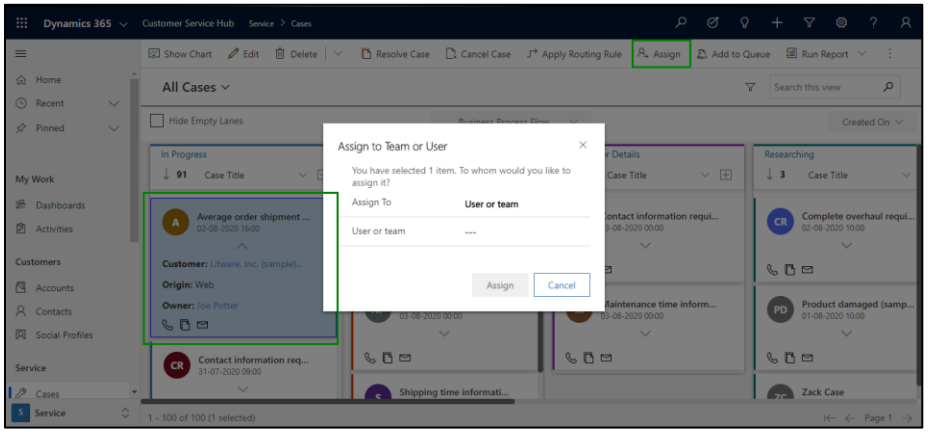
Compact Card View

The records in the Kanban View are represented as compact cards.



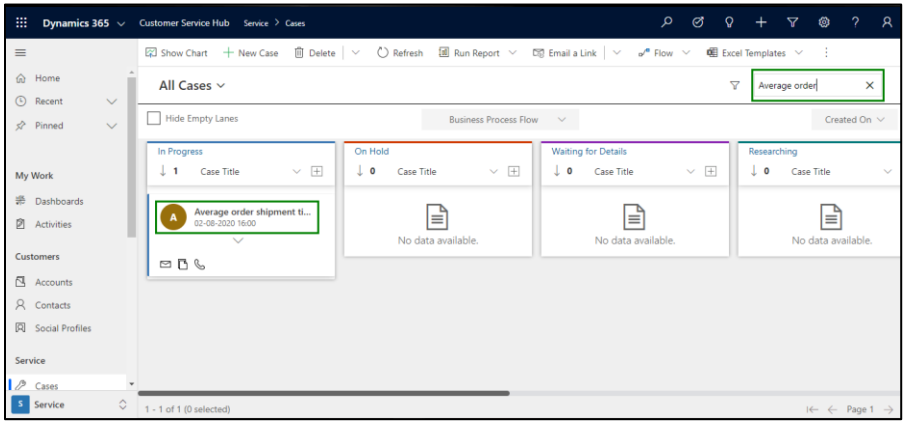
Responsive to all native ribbon actions

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.



Support for search available for Views

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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Sort Cards

Records in the lanes can be sorted. It also supports filtering of the data in the view by "CreatedOn" date.

