



User Manual

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Introduction

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. This helps to search and filter records quickly as per business requirement.

Salient 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 based on 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

Available for: Microsoft Dynamics 365 v9.1 onwards, Power Apps & CDS.

Deployment: Dynamics 365 Online.

Assigning Security Role

Kanban Board solution comes along with the following security roles for users:

- Kanban Board Administrator: The user with Kanban Board Administrator security role can see both the BPF pins i.e. Global and Personal. The user can also view and use the Kanban Board Features for data visualization in Dynamics 365 CRM.
- Kanban Board User: The user with Kanban Board User security role can view and use Kanban Board features for data visualization in Dynamics 365 CRM. Also, the user will only see the Personal pin against the BPF's.

NOTE: Only a user with System Administrator Role or System Customizer Role can install and configure the solution.

Kanban Board Configuration

Kanban Board configuration is quite easy and simple. In this document we will see how to configure Kanban Board Control in your Dynamics 365 for Case Entity.

1) Click on gear icon at top right \rightarrow Select Advanced settings.

	Dynamics 36	55 V	Sales Hub Sales > Accounts			م	Ø	Q	+	Y	ନ୍	٢	?
=			\square Show Chart + New Delete \vee D Refresh	🕻 Log In 🛛 Email a	i Link │ ∽ ∎ ⁄ª Flow	~ [1]]	Personali	ization S	ettings			
6) (-)	Home Recent	×	My Active Accounts $\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \$				15	Advance					م :
\$	Pinned	~	✓ Account Name ↑ ⊽	Main Phone 🛛 🍸	Address 1: City 🛛 🍟	Primary Co	on	Toast No About	tificatior	n Displa	y T		V
			Alpine Ski House	+43-1-12345-0	Vienna	Cathan C	ò	Privacy 8	ł Cookie	5			se.com
My	Work		Consolidated Messenger	+09-70-01-90-90	Paris	Forrest C	:h	Software	license 1	erms			messeng
	Dashboards		Microsoft	1-555-555-0135	1 Microsoft Way	Isaac Ligi	htner			isaac.li	ghtner@	ponemio	crosoft.cc
Ż	Activities	. 1	School of Fine Art	+011-1-399-555-9000	Mississaugua	Shaun Be	easley	/		info@	fineartsc	hool.ne	t
Cus	tomers		Tailspin Toys	297-555-0192	Tokyo	Marco Ta	anara			mtana	ra@tails	pintoys.	.com
	Accounts		Trey Research	+49-(0)89-0110-0	Munich	Humbert	o Ace	evedo		info@	treyresea	arch.net	
8	Contacts		Wide World Importers	+90-211-001-1234	lstanbul	Sean Cha	əi			info@	widewor	ldimpor	rters.com.

2) Then go to Settings \rightarrow Customizations.

🗰 Dynamics 365 🗸	Settings 🗸	Business Management	
Settings			
Business	Customization	System	
Business Manageme	Customizations	Administration	Email Configuration
Templates	Solutions	Security	Activity Feeds Confi
Product Catalog	Microsoft AppSo	ource 号 Data Management	Activity Feeds Rules
🍫 Service Management	← Plug-In Trace Lo	g System Jobs	Dynamics 365 App f
Mobile Offline	Solutions Histor	y Document Manage	Sales Insights
ငှံလုံ Sync Error		Auditing	

3) Next click on **Customize the System**.

	Dynamics 365 🗸	Settings ~	Customizations		م
Cust	omization				
Which	n feature would you like to	work with?			
	Create, modify, or delete com reports, processes, and other	nponents in your organizati	on. Components include entities, fields, relationships, forms,	8	Publishers Create, modify or delete a solution publisher.
8	Solutions Create, modify, export, or im;	oort a managed or unmana	ged solution.		Developer Resources View information or download files that help you develop a
	Adjust your organization's co	lors. Create, change, or del	ete themes that are used in your organization.		

4) Now go to Components \rightarrow Entities \rightarrow Select Case \rightarrow Click on the last tab – Controls.

	PowerApps					
File	🛃 🕰 Show Depend	encies 🛛 🚆 Solution Layers 🔰 🟠 Publish 🔰 🚰 Managed Proper	ties			
	Case Information Default Solution	General Primary Field Controls				
⊳	Campaign Activity	Control	Web	Phone	Tablet	
	G Case Resolution	Read-only Grid (default) Add Control	۲	۲	۲	
	Category CFS - IoT Alert Proc Channel Property					

5) Now click on Add Control \rightarrow Select Kanban Board \rightarrow Click on Add.

Add Control Select a custom control from the field.	×
Editable Grid	•
Kanban Board	
Read Only Grid	1
Time Entry Grid	-
Kanban Board	
Modes: Types: Grid	
Kanban Board is a productivity app that enables organized card-based view of Entity records in home grid. Records are systematically arranged	
Add	

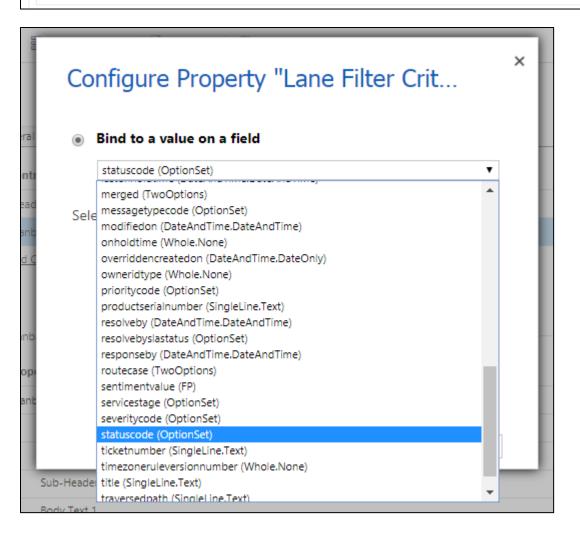
6) The radio button before Kanban Board denotes by default which control is to be loaded for Case Entity i.e. CRM OOB Grid (Read-only) or Kanban Board.If you want to display Kanban Board on Web (Computer or laptop devices) then select Web Radio button before Kanban Board. Similarly, you can select Phone or Tablet Radio button to display Kanban Board on Phone or Tablet. Here we have selected all three display modes.

neral Primary Field Controls				
Control	Web	Phone	Tablet	
Read-only Grid (default)	0	0	0	
Kanban Board	R	۲	۲	×
Add Control	Use (Control "Kanban Bo	oard" as default for	Web

 Next, for the field Lane Filter Criteria – Select the field based on which Lists will be categorized. Here, since we are selecting statuscode the list will be created based on Status Reason of Case Entity.

For example: In Progress, On Hold , Waiting for details, etc.

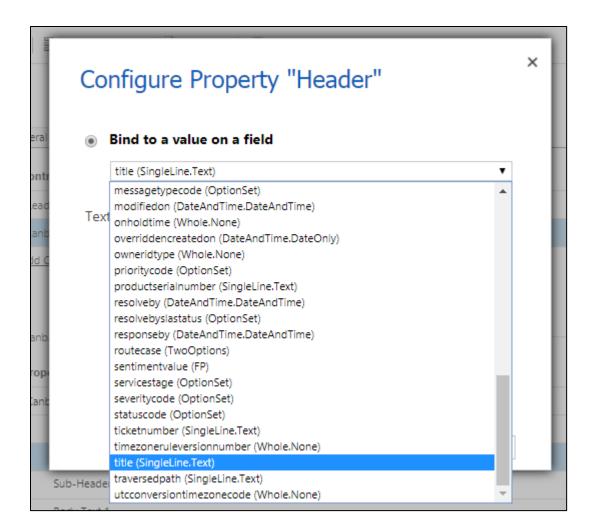
Control		Web	Phone	Tablet	
Read-only Grid (default)		0	0	0	
Kanban Board		۲	۲	۲	×
Add Control					
Kanban Board					
Property	Value				
Kanban Board Grid View					
Lane Filter Criteria *					Ø
Row Filter Crieria					Ø
					Ø
Header					



8) Next, for Row filter criteria – Select any given field from the dropdown based on which rows will be created. If Non-OptionSet field is selected then a 'Drop Zone' will be available in Kanban view to drag and drop cards from one lane to another to update only the lane.

∽
n which Rows are created
I

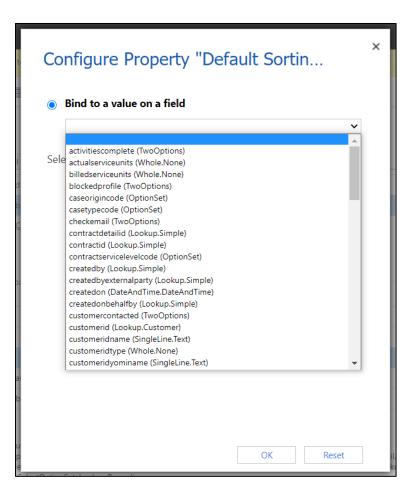
9) For Header - Select the field value that is to be displayed on header of card. In similar way populate the Sub-Header fields.



10) For Body Text 1 - Select any field value that is to be displayed on the body of the card. Similarly, select the field values for Body Text 2 & Body Text 3.

Kanban Board		
	-	
Sub-Header	Ø	
Body Text 1	Ø	
Body Text 2	Ø	
Body Text 3	Ø	

11) For Default Sorting Attribute - Select any field value based on which cards will be sorted in order.



12) For Default Sorting Direction - Select either Ascending or Descending.

Со	nfigure Property "Default Sortin	×
	Bind to static options	٦
	Ascending Descending	
By D	efault Sorting Direction i.e. Ascending or Descending (default)	
	OK Reset	

13) For Business Process Flow – Select either 'Y' (default setting) or 'N'. This field will provide you Kanban view of records as per the various Business Process Flows available in Case entity.

Bind	l to a static valu	16			
Sing	leLine.Text	~ [ſ		
🔵 Bind	l to a value on a	a field			
				~	
	ble(default), N = Gelected, Row Fil		-	Business Process	

14) For Activity Name - Enter up to 3 Activity type entity logical name that you want to display on card. Now you have to just click on these icons to create activities from Kanban Board.

\bigcirc	Bind to a static value				
	SingleLine.Text	✓ email,phonecall,task			
\bigcirc	Bind to a value on a fiel	ld			
		~			
Enter upto 3 logical name of activity type entity Eg: email,phonecall,task. Note: Activities are not allowed for Activity or Activity type entities					
ema	ail,phonecall,task. Note: A				
ema					

15) For Card Collapse - Enter the default card mode to display the details of records. (Y for collapsed mode and N for expanded mode). If the field is left blank then cards will be displayed in default **expanded** mode.

Bind to a sta	atic value				
SingleLine.Text		✓ Y			
Bind to a va	lue on a fiel	ld			
					~
Default card coll	-	-	Y = collapse	d, N =	
expand(default i	f none enter	ed)			

16) For **Row Collapsed** - Enter the default card mode to display the details of records in rows. (Y for collapsed mode and N for expanded mode). If the field is left blank then rows will be displayed in default collapsed mode i.e. expanded mode.

🔵 Bin	d to a static val	lue		
Sin	gleLine.Text	•	N	
Bin	d to a value on	a field		
				~
	row collapsed to (default if none			
	ble for Row Filte			2

Given below is the example of Kanban Board configuration for Case entity.

perty	Value	
nban Board Grid View		
Lane Filter Criteria *	statuscode (OptionSet)	Ø
Row Filter Crieria	prioritycode (OptionSet)	Ø
Header	title (SingleLine.Text)	Ø
Sub-Header	ticketnumber (SingleLine.Text)	Ø
Body Text 1	caseorigincode (OptionSet)	D

17) After filling all the details, the next step is to save the cofiguration and then finally publish it.

Power Apps							
File Show Depende	encies 🚪 Solution La	yers	Managed Properties				
Information Information	General Primary F	ield Controls					
 Log Business Closure Business Unit 	Kanban Board			۲	۲	۲	×
Campaign Campaign Activity Campaign Response Case	Add Control						
 Case Resolution Case to Work Order 	Kanban Board						
Category	Header		title (SingleLine.	Text)			Ø
CFS - IoT Alert Proc A channel	Sub-Header		ticketnumber (S	ingleLine.Text)			Ø
Channel Configurati	Body Text 1		caseorigincode	(OptionSet)			Ø
▷ 📳 Channel Property ▷ 🖏 Channel Property G	Body Text 2		createdon (Date	AndTime.DateA	ndTime)		Ø
 Channel Provider 	Body Text 3		casetypecode (C	ptionSet)			Ø

Your control will be now displayed on grid as follows:

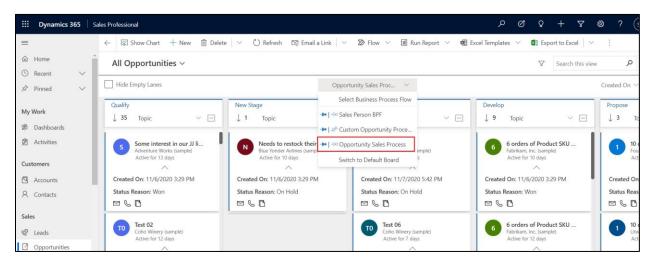
1) With Lane filter & Row Grouping based on OptionSet field (Priority), you will get the following view:

\vdots Dynamics 365 $ \smallsetminus $	Customer Service Hub Service > Cases $\mathcal{P} \oslash \mathcal{Q} + \nabla \oslash \mathcal{Q}$						
=	🖾 Show Chart 🕂 New Case 📋 Delete 🛛 🗸 🖒 Refresh 📓 Run Report 🗸 🖾 Email a Link 🗠 🧬 Flow 🗸 🖷 Excel Templates 🗸 🗄						
 G Home (¹) Recent ∨ 	All Cases ~ Search this view P						
S ² Pinned ∨	Hide Empty Lanes & Rows Business Process Flow \vee Created On \vee						
	In Progress On Hold Waiting for Details Researching						
My Work	↓ 90 Case Title ∨ ⊡ ↓ 4 Case Title ∨ ⊡ ↓ 2 Case Title ∨ ⊡						
빠트 Dashboards	High 2 \pm A High 2 \pm A High 1 \pm A High 1 \pm						
 Activities Customers 	SR Service information requir 03-08-2020 00:000 03-08-2020 00:000 02-08-2020 02:000 02-08-2020 02:000 02-08-2020 02:0000 02-08-2020 02:000 02-08-2000 02-08-2000 02:000 02-08-2020 02:000 02-08-2000 02:000 02:000 02-08-2000 02:000 02:0000000 02:0000000000000						
Accounts Contacts							
 Contacts Social Profiles 	SR Service required (sample) 02-08-2020 14:00 03-08-2020 00:00 Normal 1 E ~ Normal 2 E						
Service	PP Product damaged (sample)						
S Service	1 - 100 of 100 (0 selected) I ← ← Page 1 -						

2) With Lane filter & Row Grouping based on Non-OptionSet field (Owner), you will get the following view:

III Dynamics 365 V Customer Service Hub Service > Cases ≡ 🛱 Show Chart 🕂 New Case 📋 Delete | 🗸 🖒 Refresh 📓 Run Report 🗸 🖾 Email a Link | 🗸 🖋 Flow 🗸 🖷 Excel Templates 🗸 合 Home All Cases ~ Search this view Q C Recent \sim Hide Empty Lanes & Rows Business Process Flow \sim Created On $\, \smallsetminus \,$ 🖈 Pinned In Progress On Hold Waiting for Details Researching ↓ 90 Case Title ↓ 4 Case Title ↓ 2 Case Title ↓ 3 Case Title My Work 분 Dashboards Drop Zone Drop Zone Drop Zone Drop Zone Activities Brian Potter Joe Potter Thomas Shelby Brian Potter 90 ± ^ 4 ± ^ 2 ± ^ 3 Customers CR Contact information req... Average order shipment ... 02-08-2020 16:00 CR Contact information requi... 03-08-2020 00:00 Complete overhaul requi.. 02-08-2020 10:00 🔁 Accounts A 31-07-2020 09:00 A Contacts \sim \sim \sim \sim Social Profiles 5 d C 5 d B 6 d 🖸 5 d B Damaged during shipme... Item defective on deliver... Maintenance time inform... Product damaged (samp.. Service DS м 28-07-2020 10:0 02-08-2020 09:00 03-08-2020 00:00 01-08-2020 10:00 Cases S Service \diamond 1 - 100 of 100 (0 selected) I← ← Page 1

3) With Business Process Flow, you will get the following view:



Uynamics 365	Sales Professional			ר א ⊗ א א א א	₿ ? (s
=	\leftarrow 🖾 Show Chart $+$ New 🗊 Delete	│ ∨ 🖞 Refresh 🛛 🖾 Email a Link │ ∨	🎾 Flow \vee 🔟 Run Report \vee 🖷 E	ixcel Templates \vee 🛛 🗱 Export to Excel 🛛 🗸	:
යි Home	All Opportunities ~			Search this view	م
 ③ Recent ∨ ✓ Pinned ∨ 	Hide Empty Lanes	Oppor	rtunity Sales Proc 🗸 🗸		Created On $ \sim $
My Work	Qualify ↓ 35 Topic ✓ —	New Stage ↓ 1 Topic ∨ □	New Stage ↓ 2 Topic ∨ ⊡	Develop ↓ 9 Topic ✓ 🖃	Propose
靜 Dashboards					1.24 4.4 4.25
Activities	Some interest in our JJ li Adventure Works (sample) Active for 13 days	Needs to restock their su Blue Yonder Airlines (sample) Active for 10 days	To Test 03 Coho Winery (sample) Active for 7 days	6 orders of Product SKU Fabrikam. Inc. (sample) Active for 10 days	1 10 c Four Acti
Customers	^	^	~	~	
Accounts	Created On: 11/6/2020 3:29 PM	Created On: 11/6/2020 3:29 PM	Created On: 11/7/2020 5:42 PM	Created On: 11/6/2020 3:29 PM	Created On
R Contacts	Status Reason: Won	Status Reason: On Hold	Status Reason: On Hold	Status Reason: Won	Status Reas
Sales		•			
& Leads	To Test 02 Coho Winery (sample) Active for 12 days		Test 06 Coho Winery (sample) Active for 7 days	6 orders of Product SKU Fabrikam, Inc. (sample) Active for 12 days	1 10 c Litw Acti
Opportunities	~		~	~	

If you didn't select any of the Radio Buttons, then for viewing Kanban Board you would have to navigate to Case entity grid \rightarrow Click on ellipses \rightarrow Select 'Show As' \rightarrow Click on Kanban Board.

::: Dynamics 365	Sales Hub Sales ≻ Cases			ନ ଓ ତ ଏ	+ 7
=	🛱 Show Chart 🕂 New Case 🛽 🗍	🗓 Delete 🗸 💍 Refresh 🕻 Log	i In 🔟 Run Report 🗸 🖸	ଞ Email a Link │ ╰ ଜ⁄ª Flov	N ~ ···
合 Home	All Cases 🗸			🕮 Excel Templates	>
 Generate ✓ 	✓ Case Title	\uparrow \bigtriangledown Case Number \bigtriangledown	Priority 🛛 🖓 Origin	Export to Excel	>
X Primed V	Average order shipment time	CAS-01213-P8B3X0	Normal Web	Import from Excel	>
My Work	Complete overhaul required	CAS-01214-S6Z4Z6	Normal Web	Den Dashboards	
해주 Dashboards	Contact details requested	CAS-01215-N0Y1T2	Normal Email	Show As	>
Activities	Customer Contact Information	CAS-01216-L3S7F2	Normal Email	Blue Yonder Airlines	C Kelly Krout
Customers	Delivery never arrived	CAS-01219-H6B9P4	Low Phone	Alpine Ski House	O Sam P
Accounts	Dysfunctional Litware Laptop Ke	eyboard X105 CAS-00055-V8L7L7	Normal Web	Graphic Design Institut	🛛 Jamie Redir
A Contacts	Faulty product catalog	CAS-01220-S1K8F4	Normal Email	Fourth Coffee	Kelly Krout
Sales	Incorrect product information o	cAS-01222-S6G5J0	High Email	Litware	O Anne Weile
& Leads	Information on the product	CAS-01223-Z6Y4Y1	Low Email	Consolidated Messeng	③ Sam P

III Dynamics 365 🗸	Sales Hub Sales > Cases		ନ ଓ ତ + ସ	R 🕸 ?
=	🛱 Show Chart 🕂 New Case 🛍 Delete 🛛 🗸	🖔 Refresh 🕻 Log In 🔟 Run Report 🗸 🖾 Er	mail a Link 🛛 🗸 🖉 Flow 🗸 🖓	
合 Home	All Cases 🗸		← Back	ch for records
 L Recent ∨ S² Pinned ∨ 	✓ Case Title ↑ $𝔅$	Case Number 🖓 Priority 🍸 Origin 🤊	Kanban Board	∽ Status
/	Average order shipment time	CAS-01213-P8B3X0 Normal Web	Litware O Christa	Geller (Sam) Active
My Work	Complete overhaul required	CAS-01214-S6Z4Z6 Normal Web	Consolidated Messeng 💿 Sam P	Resolved

And if you have selected web radio button before Kanban, then to switch back to default grid you would have to follow same step as mentioned above. But this time you would have to select Read Only Grid.

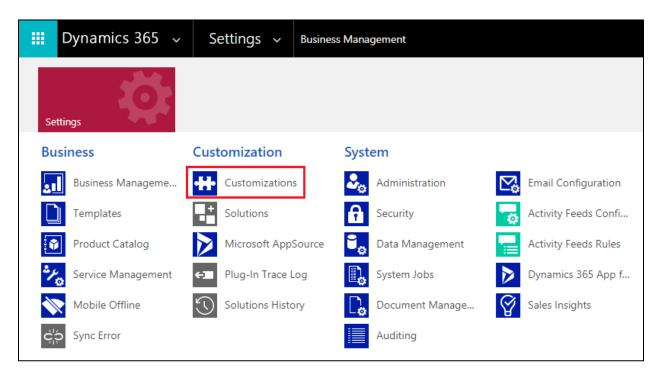
🗰 Dynamics 365 🗸	Customer Service Hub Service > Cases	<u>۲</u> که کر	2 + 7 @ ? A
=	🖾 Show Chart 🕂 New Case 🛍 Delete 🛛 🗸 Refresh 🔟 Run Report 🗸 🖾 Email a	a Link \sim of Plow \sim 🕮 Ex	ccel Templates \vee 🗄
 ☆ Home ◆ Recent ∨ 	All Cases ~	\leftarrow Back	٩
S Pinned ∨	Hide Empty Lanes & Rows Business Process Flow V	Read Only	Grid ated On \vee
	In Progress On Hold Waitin	ig for Details	Researching
My Work	\downarrow 91 Case Title \checkmark \Box \downarrow 3 Case Title \checkmark \downarrow 2	Case Title 🗸 🖃	\downarrow 3 Case Title \checkmark
빠. Dashboards	High 2 \pm A High 2 \pm A High	1 🕀 🔨	High 1 🛨
 Activities Customers 	SR Service information requir 1 Item defective on delivery 03-08-2020 00:00	Maintenance time inform 03-08-2020 00:00	CR Complete overhaul requir 02-08-2020 10:00
Accounts Contacts		» D	
Social Profiles	SR Service required (sample) 02-08-2020 14:00 NP Noise from product (samp 03-08-2020 00:00	1 + ^	Normal 2 🕂
Service		Contact information requi 03-08-2020 00:00	PD Product damaged (sample) 01-08-2020 10:00
S Service	1 - 100 of 100 (0 selected)	N/	$i \leftarrow \leftarrow$ Page 1 \rightarrow

Configuration for Specific View

Apart from this, you can make the Kanban Board available for **certain views in an Entity**. This is possible by adding Data-set Control on Entity Views.

To add Data-set Control on Entity Views follow the steps given below:

1) Go to Settings \rightarrow Customizations.



2) From there go to Customize the System \rightarrow Entities.

🗰 Dynamics 365 🗸 S	Settings ~ Customization	s		م	e se	+
Apps for Dynamics 365 View Dynamics 36	0	Solution: Default Solution - Microsof	t Dynamics 365 - Google	e Chrome		×
Customization		m/tools/solution/edit.aspx?id=%7bfd140a	af-4df4-11dd-bd17-0019b	9312238%7d		
Which feature would you like to worl	PowerApps					
Customize the System		better way to customize the system Try New Ex	perience			×
Create, modify, or delete compone reports, processes, and others.	File	🖺 🥰 Show Dependencies 🛛 🖳 Export Solu	ution 🛛 💱 Translations 👻 🗍 👔	Publish All Customizations	<u>∕%</u> Actions →	
Solutions Create, modify, export, or import a	Solution: Default Solutior				6)
-	Solution Default Solution	Component Type All	•			
Themes Adjust your organization's colors. Q	2 Information	🖞 New 🗸 🗙 Delete 🛛 🚺 Publish 🛛 🖷 S	Show Dependencies 🛛 🗧 Solu	tion Layers 🛛 🚰 Managed	Properties	
	Components	□ Display Name ↑	Name	Туре	State	Ö
	Client Extensions		sdkmessage_autotran	Option Set	Managed	^
	₽rocesses ► +□ Plug-in Assemblies		subscriptionstatisticso	Option Set	Managed	
	Sdk Message Processin		organization_featuree	Option Set	Managed	
	Dashboards		flipswitch_options	Option Set	Managed	
	Reports	Consected2 Dialog for Condin	(Depresented) Dialog f	Dialog Poy	Managed	• •
	Article Templates	1 - 50 of 8145 (0 selected)		M 4	Page 1	

3) Next, click on any Entity, for e.g. 'Account' \rightarrow Views \rightarrow Click on any view, for e.g. 'All Account'.

🙆 Inogic	- Mapi 🗙 🌀	0	Solution: Default Solu	ution - Microsoft Dynamics 36	5 - Google Chrom	e	- 🗆 🗙
$\leftarrow \rightarrow$	C 🔒 cao	a caonite.crm8.dynamics.co	m/tools/solution/edit.aspx?id=	%7bfd140aaf-4df4-11dd-bd17-	0019b9312238%7d	#	
🗰 Dy	namics 3	III PowerApps					
Apps for	r Dynamics 365	Try New Experience There's	a better way to customize the system	Try New Experience			×
Custom	nization	File Publish All Customizati	ions				
Which fea	ture would y	Account					
	Customize Create, modify,	Solution Default Solution	View: All Active Views				۲
	reports, process		New X More Action	· •			
	Solutions	Components					
	Create, modify,	Entities Account	Name	Туре	State	Customizable	Description
		Forms	All Accounts	Public View	Managed	True	*
	Themes Adjust your org	Charts	Quick Find Active Acc	ounts Quick Find View	Managed	True	
_₩	Aujust your org	👘 Keys 📽 1:N Relationships	Accounts: Responded	to Camp Public View	Managed	True	
		N:1 Relationships N:N Relationshi	Vendors	Public View	Managed	True	
		Messages	Account List Member	View Associated View	Managed	True	Displays informat
		Hierarchy Setti	My Connections	Public View	Managed	True	Shows all active i
		Account Project Pri	Account Lookup View	Lookup View	Managed	True	

4) In that click on 'Custom Controls' \rightarrow 'Add Control'.

caonite.crm8.dynamics.com/t PowerApps Try	ools/solution/edit.aspx?id=%7bfd140aaf-4df4-11dd-bd17-0019b9312238%7d4 View: All Accounts - Microsoft Dynamics 365 - Google Chrome	# _ _ ×	×
Caonite.crm8.dynar	nics.com/tools/vieweditor/viewManager.aspx?id=%7b65FFAF9A-E8C5-432D-80	60B-32F841B00D87%	<u>@</u> <u>H</u> elp ▼
File III PowerAp	Custom Controls ×		• Пер .
File Save As	Set the custom control properties.	@ <u>H</u> elp ▼	
Solution D View: All Acco		n solution: Default Solution	•
Compe Account Name	Control Web Phone Tablet	Common Tasks	on 💍
⊿ ≘	Add Control	$\leftarrow \rightarrow$	A
		Custom Controls	
		Configure Sorting	
4		Change Properties	nformat
			active i
Image: Try New Experience: T Image: Try Note: When there are to Image: Try Note: When there are to	Select or add a custom control to see its configuration.	•	
	OK Cancel		Accoun 👻
Actual Data Export (1 - 22 of 22 (1 selected)	Page 1	•
Address			

5) Here a list of Data-set control will be displayed. Select the respective Data-set Control that you want to add i.e. 'Kanban Board' →Click on 'Add'.

•	View: All Accounts - Microsoft Dynamics 365 - Google Chro	ome – 🗆 🗙
a caonite.crm8.dynami	cs.com/tools/vieweditor/viewManager.aspx?id=%7b65FFAF9A-E8C5	-432D-860B-32F841B00D87%
III PowerAp	Custom Controls	
File Save As	Add Control Select a custom control from the field.	X @ Help +
Account Name	CC_SimilarCases_GridControl_Name	Common Tasks
	Kanban Board Read Only Grid	$\leftarrow \rightarrow$
	Time Entry Grid Kanban Board	View Properties
	Modes: Types: Grid	C Edit Filter Criteria
-	Kanban Board is a productivity app that enables organized card-based view of Entity records in home grid. Records are systematically arranged	Can Change Properties
Try New Experience: To Note: When there are to	Add	
	OK Canc	e

Note: Added control will be available for this view only and not for all views.

6) Next enable Kanban Board for Web, Phone and Tablet.

Powe View: All Accounts - Micros	oft Dynamics 365 - Google Chrome						- 🗆 🗙	
marchdev4.crm8.dyna Try New Exper Power Ag	mics.com/tools/vieweditor/vie	wManager	.aspx?id	=%7b65F	FAF9A-E80	25-432	D-860B-32F841B00D8	×
File Publis	Custom Controls Set the custom control prope	rties.				×	@ <u>H</u> eip ·	@ <u>H</u> elp •
Account							n solution: Default Solution	
Solution Default Solu	Control	Web	Phone	Tablet			Common Tasks	
Components Account Name	Read-only Grid (default)	0	\bigcirc	0				
Account	Kanban Board	۲	۲	۲	×		$\leftarrow \rightarrow$	U
E Form	Add Control						☐ View Properties	ic
file Chart	<u>ndd controllin</u>						Custom Controls	
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[♥] Keys 르글 1:N R	Kanban Board						Configure Sorting	
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Al Builder Dataset F		Kanhan Boa	rd - User	Manual do	cy - Word +			

7) Now it will be shown to only the specific view 'All Accounts'.

🗰 Dynamics 365 🗸	Customer Service Hub Service > Accounts		Q	Ø	Q	+	\mathbb{Y}	ŝ	?	R
=	☑ Show Chart + New 🗊 Delete ∨	🖔 Refresh 🛛 Email a Link 🛛 🗸 🖉 Flow 🗸 🗐 Run Report	~	曜 Exc	el Templ	ates 🚿	< :			
 ᢙ Home (L) Recent 	All Accounts \sim				∇	Sear	ch this v	iew	ېر	2
🖉 Pinned 🗸 🗸	Hide Empty Lanes	Business Process Flow \sim						Crea	ited On	\sim
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影 Dashboards ② Activities	FC Fourth Coffee (sample)	AW Adventure Works (sample)								
Customers										
Accounts Contacts	Litware, Inc. (sample)	AH Alpine Ski House (sample)								
R Social Profiles	~	~								
Service										
🖉 Cases 🔻	Fabrikam Inc. (cample)									
S Service	1 - 250 of 5000+ (0 selected)						1	\leftarrow	Page	ı →

Configuration for Subgrid

Similarly, you can make the Kanban Board available for **subgrid**. This is possible by adding Kanban Control on **Form**.

To add Kanban Control on Subgrid follow the steps given below:

1) Go to Settings \rightarrow Customizations.

🗰 Dynamics 365 🗸	Settings 🗸 Busine	ss Management	
Settings			
Business	Customization	System	
Business Manageme	Customizations	Administration	Email Configuration
Templates	Solutions	Security	Activity Feeds Confi
Product Catalog	Microsoft AppSource	Data Management	Activity Feeds Rules
🍾 Service Management	← Plug-In Trace Log	System Jobs	Dynamics 365 App f
Mobile Offline	Solutions History	Document Manage	Sales Insights
ငှံ၃ Sync Error		Auditing	

2) From there go to Customize the System \rightarrow Entities.

🗰 Dynamics 365 🗸 S	ettings ~ Customization	s		ې	C C	+
Apps for Dynamics 365 View Dynamics 36	0	Solution: Default Solution - Microsof	ft Dynamics 365 - Google	e Chrome		×
Customization		m/tools/solution/edit.aspx?id=%7bfd140a	aaf-4df4-11dd-bd17-0019ł	o9312238%7d		
Which feature would you like to worl	PowerApps					
Customize the System		better way to customize the system Try New Ex	perience			×
Create, modify, or delete compone reports, processes, and others.	File Save and Close	🖺 🦷 Show Dependencies 🛛 🐺 Export Solu	ution 💱 Translations 🕶 🛛 👔	Publish All Customizations	<u> ∱A</u> ctions →	
Solutions Create, modify, export, or import a	Solution: Default Solution				16	ки i
	Solution Default Solution	Component Type All	•			
Themes Adjust your organization's colors. Q	🐉 Information 🔺	🖞 New 🗸 🗙 Delete 🛛 🚺 Publish 🛛 🖷 🗄	Show Dependencies 🛛 🚆 Solu	ition Layers 🛛 🚰 Managed	Properties	
	Components Compon	□ Display Name ↑	Name	Туре	State	Ö
	Client Extensions		sdkmessage_autotran	Option Set	Managed	
	₽ Processes → Plug-in Assemblies		subscriptionstatisticso	Option Set	Managed	
	Sdk Message Processin Sdk Message Processin		organization_featuree	Option Set	Managed	
	Dashboards Dialog Boxes		flipswitch_options	Option Set	Managed	
	Reports	TDepresented) Dialog for Condin	(Doprocated) Dialog f	Dialog Poy	Managod	• •
	Article Templates	1 - 50 of 8145 (0 selected)		K 4	Page 1	

3) Next, click on any Entity, for e.g. 'Account' \rightarrow Form \rightarrow Select 'Account'.

Account								
lution Default Solution	System	n Forms Active Forms 🗸						
Components	-	🗸 🗙 Delete 🛛 🚳 Enable Security	Roles 🛛 👼 Fo	rm Order 🕶 🛛 浸 Activa	te 🛛 🎎 Deacti	vate More Ac	tions 👻	
Entities Geprecated] Data Goprecated] Dyna		Name	Form State	Form Type ↑	State	Customizat	ole Version	De
Account		Account for Interactive experie	Active	Main	Managed	True	8.0.0.0	Defa
📅 Views 👔 Charts		Sales Insights	Active	Main	Managed	True	1.0	Upd
📒 Fields 🛐 Keys		Account	Active	Main	Managed	True	5.0.0.0	Upd
📽 1:N Relationships		Account Quick Create	Active	Quick Create	Managed	True	6.0.0.0	Defa
💦 N:N Relationshi 🎦 Messages		Account Hierarchy Tile Form	Active	Quick View F	Managed	True	7.0.0.0	This
Business Rules		Social Profiles	Active	Quick View F	Managed	True	6.1.0.0	A for
Dashboards		App for Outlook Account Card	Active	Quick View F	Managed	True	1.0	Арр
 Action Card Regardi Action Card Role Se 	•							۱.

4) Here, add new tab on the form.

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Fower Ap	5	
FILE HOME INSERT		0
Save As	Change Remove Properties Change Armove Body Redo Dot Strain Change Remove Properties Change Remove Redo Torris Change Remove Remove Redo Torris Change Remove Rem	
Save	Edit Select Form Upgrade	
i Form headers now defau	t to high density to display more data. Use the new form designer to edit header density. Learn more	
Account	Solution: Default Solution	Field Explorer >
_ Summary _ Details _ Files	Form: Account	Filter All Fields ✓ ✓ Only show unused fields
 KanbanTab Assets and Locations 		Account Number
	KanbanTab	Account Rating
Common A Playbooks		Address 1: Address Type
Activities	Section	Address 1: City
Social Profiles	Cases (Customer)	Address 1: Country/Region
Contacts		Address 1: County
Documents		Address 1: Fax
🛃 Connections		Address 1: Latitude
👔 Documents		Address 1: Longitude
Audit History		Address 1: Name
🔝 Entitlements		Address 1: Post Office Box
Devices		
🗟 IoT Devices		Address 1: Primary Contact Name
Functional Locations		Address 1: State/Province
▲ Sales	Assets and Locations	Address 1: Street 1
Leads		Address 1: Street 2
Opportunities	Assets and Locations	New Field

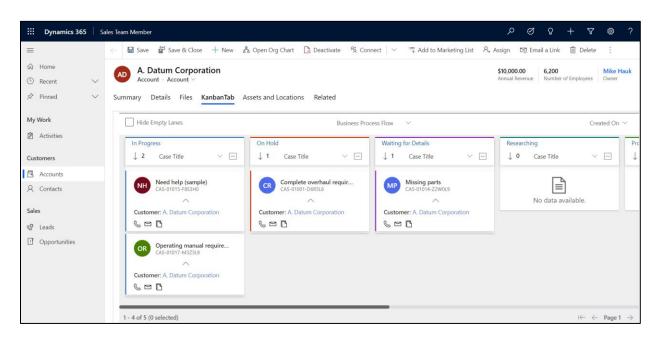
5) Now select the tab \rightarrow Click on 'Change Properties' \rightarrow Go to 'Display' \rightarrow Select the required details.

HOME INSERT	Remove	Set Properties ? × Set the List or Chart properties.	
Publish Propertio	Edit	Display Formatting Controls	
n headers now default to high	n density to displ	Name	
t	Solu	Specify a unique name. Name * AllCasesGrid	Field Ex
ny III	Forn	Name	Filter
Tab			Accou
and Locations		Label * Cases (Customer)	Accou
on 🔺	KanbanTab	Display label on the Form	Addres
ybooks	Section	Panel header color #F3F3F3	_
ivities	Cases (Custor	Data Source	Addre:
ial Profiles	Cases (Custo)	Specify the primary data source for this list or chart.	Addre
ntacts		Records Only Related Records ✓	Addre
cuments		Entity Cases (Customer)	Addre
nnections		Default View All Cases	Addre
cuments		Edit New	Addre
dit History			Addres
itlements		Additional Options	Addre
/ices		Display Search Box	Addre
Devices		Display Index 🛈	
ctional Locations	t	View Selector Off	Addre
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6) Next go to 'Controls' \rightarrow Enable Kanban Board for Web, Phone and Tablet.

Display	Formatting	Controls					
Contr	ol		Web	Phone	Tablet		
Read	-only Grid (defau	ılt)	\bigcirc	\bigcirc	\bigcirc		
Kanba	an Board		$oldsymbol{\circ}$	•	۲	×	
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	Lane Filter Crite	ria* statusc	ode (Opt	tionSet)		Ø	
	Row Filter Crieri	а				Ø	
	Header	title (Si	ngleLine	Text)		0	.
							Ŀ.

7) Now it will show the related cases of a particular record in Kanban View.



P a g e 27 of 38

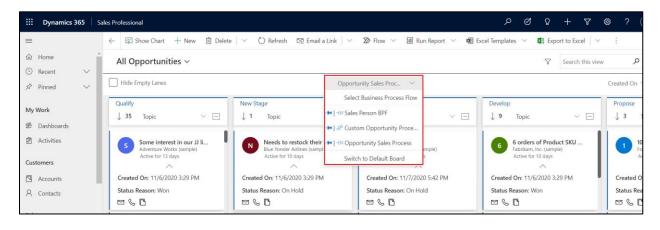
Kanban Board Features

Kanban Board provides an organized view of records on home grid. Its various features helps to systematically organize records as per requirement. Let's have a look at these features of Kanban Board:

1. BPF (Business Process Flow) Support

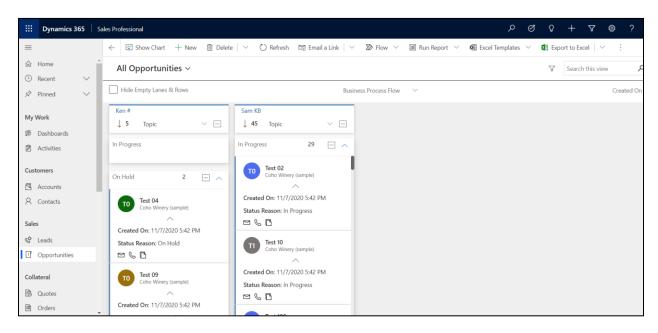
Organize and categorize records of a given entity in Kanban view as per the Business Process Flow defined for that entity. Here, 2 pins will be seen besides each of the Business Process Flow.

- The dark blue pin is the Global pin. The BPF on which Global pin is used will be pinned for all the users using Kanban Board.
- The white pin is the Personal pin which is used for pinning BPF for a specific user. The BPF on which Personal pin used by a particular user, say User A, will be pinned only for that user.



Dynamics 365 Si	ales Professional			ନ ଓ ହ + ସ	֎ ?
=	\leftarrow 🕼 Show Chart $+$ New 🗊 Delete	🛛 🗸 🕐 Refresh 🛛 Erail a Link 🗠	🔊 Flow \vee 🗐 Run Report \vee 🖷 E	ixcel Templates $$:
A Home I Recent ∨	All Opportunities \sim			√ Search this view	
✓ Pinned ∨	Hide Empty Lanes	Oppor	tunity Sales Proc 🗸		Created (
My Work	Qualify ↓ 35 Topic ∨ ⊡	New Stage ↓ 1 Topic ∨ ⊡	New Stage ↓ 2 Topic ✓ □	Develop ↓ 9 Topic ∨ ⊡	Propos J 3
港 Dashboards 2 Activities	Some interest in our JJ li Adventure Works (sample)	N Needs to restock their su Blue Yonder Airlines (sample)	Test 03 Coho Winery (sample)	6 orders of Product SKU Fabrikam, Inc. (sample)	1
Customers	Active for 13 days	Active for 10 days	Active for 7 days	Active for 10 days	
Accounts	Created On: 11/6/2020 3:29 PM	Created On: 11/6/2020 3:29 PM	Created On: 11/7/2020 5:42 PM	Created On: 11/6/2020 3:29 PM	Create
R Contacts	Status Reason: Won	Status Reason: On Hold	Status Reason: On Hold	Status Reason: Won	Status
Sales © Leads	Test 02 Coho Winery (sample) Active for 12 days		Test 06 Coho Winery (sample) Active for 7 days	6 orders of Product SKU Fabrikam, Inc. (sample) Active for 12 days	0
Opportunities	^		~	~	

Click on 'Switch to Default Board' to switch the Kanban Board to Default Board.



This field is by default enabled. You can disable/enable this field while configuring the Kanban View Component for a view as shown below:

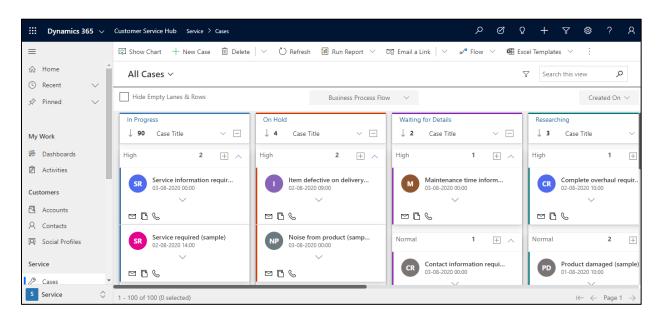
Con	figure Pro	operty "	Enable	e Busir	ie
Bi	nd to a static v	/alue			
S	ingleLine.Text		•		
) Bi	nd to a value o	on a field			
					*
	nable(default), N s Selected, Row				iness Process
				ОК	Reset

2. Row Grouping

Categorize and group records in row based on any field value. For example depending upon on priority – High, Normal, Low.

The cards (records) can be dragged and dropped from one row to another. As a result, the field of that record is updated in both lane & row.

You can also expand / collapse these rows through a toggle icon beside the row title and through the icon beside lane header you can toggle all the rows in a lane.



The field to be used for row categories can be defined when configuring the Kanban View Component for a view as shown below:

General Primary Field Controls						
Kanban Board		۲	۲	۲	×	
Add Control						
Kanban Board						
Property	Value					
Kanban Board Grid View						
Lane Filter Criteria *					O	
Row Filter Crieria					Ø	
Header					Ø	
Sub-Header					Ø	

Another factor seen in Row Grouping is the 'Drop Zone'. This field will let you drag and drop records from one lane to another lane and update only the lane criteria. It is automatically enabled for non-optionset fields in row filter criteria.

III Dynamics 365 🗸	Customer Service Hub Service > Cases		ନ ବ ଦ) + V 🕸 ? A
=	🛱 Show Chart 🕂 New Case 볩 Delete	│ ∨ 🖒 Refresh 🔟 Run Report ∨ 1	🖙 Email a Link 🛛 🗸 🗗 🖓 Exe	cel Templates \vee
 分 Home ▲ ▲<	All Cases ∨		7	Search this view
🖈 Pinned 🗸 🗸	Hide Empty Lanes & Rows	Business Process Flov	N ~	Created On $ \smallsetminus $
	In Progress	On Hold	Waiting for Details	Researching
My Work	↓ 90 Case Title ∨ ⊡	↓ 4 Case Title ∨ ⊡	↓ 2 Case Title ∨ ⊡	↓ 3 Case Title ∨
비트 Dashboards	Drop Zone	Drop Zone	Drop Zone	Drop Zone
Activities	Brian Potter 90 🛨 🔨	Joe Potter 4 ± ^	Thomas Shelby 2 🛨 🔨	Brian Potter 3 🛨
Customers				
Accounts	CR Contact information req 31-07-2020 09:00	A Average order shipment 02-08-2020 16:00	CR Contact information requi 03-08-2020 00:00	CR Complete overhaul requi 02-08-2020 10:00
A Contacts	~	~	\sim	\sim
Social Profiles		© □ □	6 🗆 🖸	600
Service	Damaged during shipme 28-07-2020 10:00	Item defective on deliver 02-08-2020 09:00	Maintenance time inform 03-08-2020 00:00	Product damaged (samp 01-08-2020 10:00
🧷 Cases 🔹		- v	~	~
S Service	1 - 100 of 100 (0 selected)			$\scriptstyle i \leftarrow \leftarrow$ Page 1 \rightarrow

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

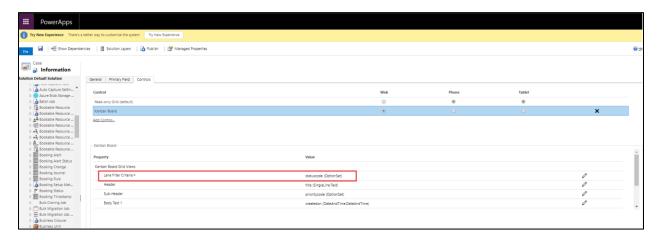
Kanban Board presents the selected View in a Kanban view for quick access and easy understanding and classification of the data in the view.

III Dynamics 365 🗸	Customer Service Hub Service > Cases		ଦ ଓ ବ	9 + 7 @ ? A
=	🛱 Show Chart 🕂 New Case 볩 Delete	∨ 🖒 Refresh 🔟 Run Report ∨ 1	🖙 Email a Link 🛛 🗸 💅 Flow 🗸 🖷 Exc	cel Templates \vee
 分 Home ▲ ▲<	All Cases ∨		7	Search this view
☆ Pinned ∨	Hide Empty Lanes	Business Process Flov	N ~	Created On $ \smallsetminus $
My Work	In Progress \downarrow 91 Case Title \checkmark \pm	On Hold ↓ 3 Case Title ∨ ⊕	Waiting for Details \downarrow 2 Case Title \checkmark	Researching ↓ 3 Case Title ∨
#토 Dashboards D Activities	Average order shipment 02-08-2020 16:00	Item defective on deliver 02-08-2020 09:00	Contact information requi 03-08-2020 00:00	CR Complete overhaul requi 02-08-2020 10:00
Customers	6 G 🖻	600		660
Accounts	Contact information req 31-07-2020 09:00	Noise from product (sam 03-08-2020 00:00	Maintenance time inform 03-08-2020 00:00	PD Product damaged (samp 01-08-2020 10:00
R Social Profiles	\sim	\sim	\sim	~
Service		600		669
🥬 Cases 🗸	Damaged during shipme	Shipping time informati		Zack Case
S Service	1 - 100 of 100 (0 selected)			$i \leftarrow \epsilon$ Page 1 \rightarrow

The lanes are defined based on the unique value options supported for the specified field. The product currently supports all field types except complex field types like Customer and Multi-Select Optionset for defining lane categories.

Hide Empty lanes using the filter option provided at the top. Do note if the lanes are hidden, you will not be able to move the cards to the said lane and thereby update the record to that status.

The field to be used for lane categories can be defined when configuring the Kanban View Component for a view as shown below.



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

Kanban Board presents a Kanban view of the records presented as compact cards. The product supports moving the records around from one lane to another with a quick drag and drop action. This also results in updating the corresponding field value appropriate to the data value of the lane.

III Dynamics 365 $ \lor $	Customer Service Hub Service > Cases) ا ^ی کر	2 + 7 @ ? A
=	🛱 Show Chart 🕂 New Case 📋 Delete	🗸 🖔 Refresh 🔟 Run Report 🗸 🗔	🛿 Email a Link 🛛 🗸 🗗 🖓 Elow 🗡 🖷 Es	kcel Templates \vee
 ☆ Home ♠ Recent 	All Cases ∨			
	Hide Empty Lanes	Business Process Flow	\checkmark	Created On $ \smallsetminus $
	In Progress	On Hold	Waiting for Details	Researching
My Work	↓ 91 Case Title ∨ 🛨	↓ 2 Case Title ∨ 🛨	↓ 3 Case Title ∨ ±	↓ 3 Case Title ∨
 Dashboards Activities 	Average order shipment 02-08-2020 16:00	Item defective of	Contact information req	Complete overhaul requi 02-08-2020 10:00
Customers	60	02-08-2020 09:00		~ C 🖻
Accounts	Contact information req 31-07-2020 09:00	Noise frc 6 🖸 🖾	tenance time infor 03-08-2020 00:00	PD Product damaged (samp 01-08-2020 10:00
Social Profiles	\checkmark	\sim	\sim	\sim
Service		600	660	5 G M
🖉 Cases 👻	Damaged during shipme	Shipping time informati		Zack Case
S Service	1 - 100 of 100 (0 selected)			${ m i} \leftarrow { m Page}$ 1 $ ightarrow$

5. Quick access to important information in a compact card view.

The records in the Kanban View are represented as compact cards. You can define up to 5 fields to be displayed in the card.

Header Text

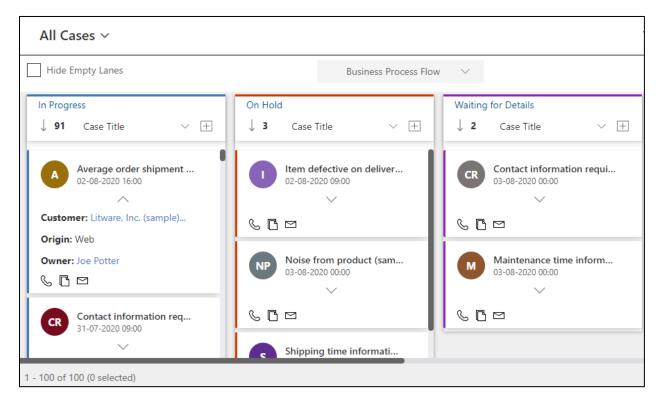
Sub Header Text

Body Text 1

Body Text 2

Body Text 3

You can collapse and expand the card view to show the details defined for the card.



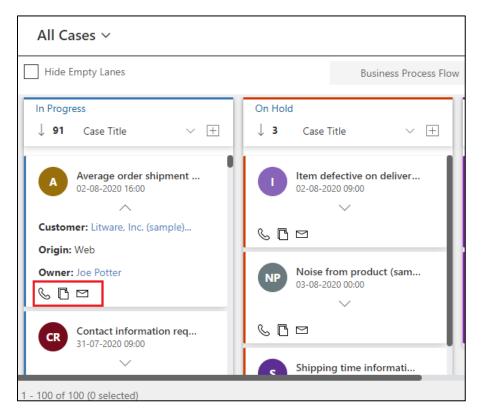
Double-click on the card to open the record form.

The fields for these can be defined when configuring the component for a view as shown in the screenshot below.

ieneral Primary Field Controls						
Control		Web	Phone	Tablet		
Read-only Grid (default)		0	0	0		
Kanban Board		۲	۲	۲	×	
Add Control						
Kanban Board						
Lane Filler Uniena *	statuscode (OptionSet)			6	-
Row Filter Crieria					Ø	
Header	title (SingleLine.Text)				Ø	
Sub-Header	prioritycode (OptionSe	et)			Ø	
Body Text 1	createdon (DateAndTi	me.DateAndTime)			Ø	
Body Text 2	customerid (Lookup.C	customerid (Lookup.Customer)				
Body Text 3	caseorigincode (Optio	nSet)			Ø	

6. Support to define quick activity actions for the records.

Each card supports defining of up to 3 quick activity actions. You can create the activity record defined in a single click from this view.



The quick create form that shows up comes pre-populated with the reference to the said record already set.

\cdots Dynamics 365 $ imes $	Customer Service Hub Service > Cases			Quick Create: Phone C	all ×
=	🛱 Show Chart 🕂 New Case 🗴 Delete	🖂 💍 Refresh 🔟 Run Report 🖂 🛙	ন্থ Email ঃ		- / 1
 分 Home ▲ ▲<	All Cases 🗸			Call To	×
 Le Recent ✓ ✓ ✓ ✓ ✓ ✓ 	Hide Empty Lanes	Business Process Flow	v ~	Direction	Outgoing
	In Progress	On Hold	Waitir	DESCRIPTION	
My Work	\downarrow 91 Case Title \checkmark \pm	\downarrow 3 Case Title \lor $+$	↓ 2	Phone Number	-
) 문 Dashboards	Average order shipment	Item defective on deliver	CR	Description	
Activities	A 02-08-2020 16:00	02-08-2020 09:00		Duration	30 minutes
Customers	Customer: Litware, Inc. (sample)	600	S (🗊
Accounts	Origin: Web Owner: Joe Potter	Noise from product (sam		Due	©
R Contacts		03-08-2020 00:00		Priority	Normal
Social Profiles	Contact information req 31-07-2020 09:00	60¤	S (Regarding	R Average order shipment time (sa
✓ Cases 🗸	1 - 100 of 100 (0 selected)	Shipping time informati			Save and Close V Cancel

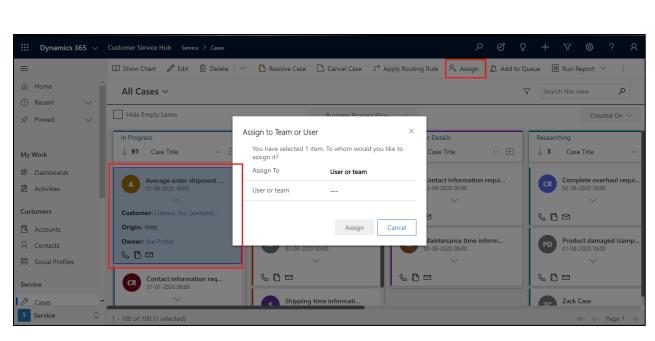
The activities to be supported can be defined in the configuration screen when setting up the component for a view as shown in the screenshot below.

Case							
iolution Default Solution	General Primary Field Controls						
 Auto Capture Settin Azure Biob Storage 	Control		Web	Phone	Tablet		
> 🔥 Batch Job	Read-only Grid (default)		0	۲	۲		
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> g [®] Bookable Resource > 2권 Bookable Resource > 수축 Bookable Resource > 수축 Bookable Resource	Add Central						
 Bookable Resource Bookable Resource 	Kanban Board	LINE (Singletune.rext)				v	
 Booking Alert Booking Alert Status 	Sub-Header	prioritycode (OptionSet)				0	
Booking Change	Body Text 1	createdon (DateAndTime.DateAndTime)				0	
 Booking Journal Booking Rule 	Body Text 2	customerid (Lookup.Customer)				0	
 Booking Setup Met Booking Status 	Body Text 3	caseorigincode (OptionSet)				0	
Booking Timestamp	Activity name(comma separated)	email(task,phonecail (SingleLine.Text)				0	
 Bulk Cloning Job Bulk Migration Job Bulk Migration Job 	Card mode(Y = collapsed(default) , N = expand)					Ø	*

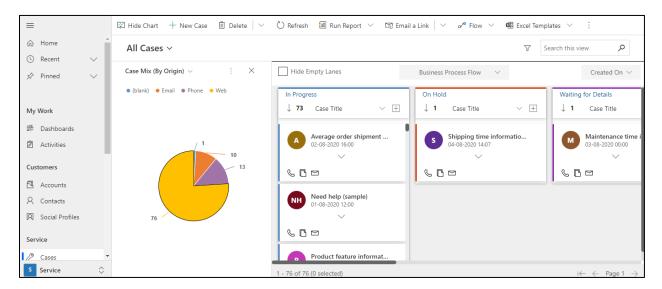
Make sure to type in the schema name of the activity types. You can also choose a custom activity type here.

7. Works in context of the native CRM environment and responds to all native ribbon actions available for traditional views.

Kanban Board has been created as a Power Apps Component. This means that you can use this control to replace the default visualization available for the views in CRM. 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.



Apart from the ribbon it also responds to filtering options from Charts.



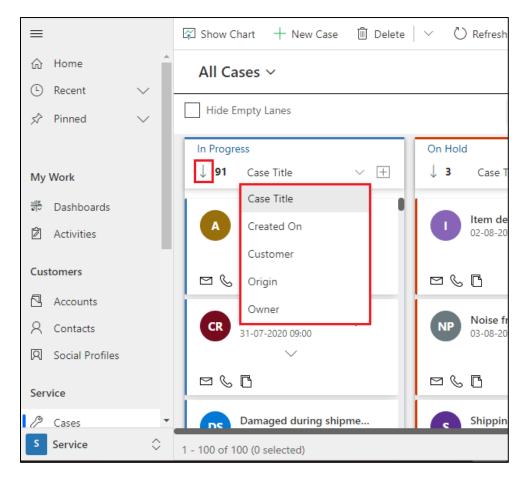
8. Support for search through native quick search available for views in CRM.

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.

III Dynamics 365 🗸	Customer Service Hub Service > Cases		ନ ର ଏ	9 + 7 @ ? A
=	🛱 Show Chart 🕂 New Case 🏾 📋 Delete	🗸 🕐 Refresh 🔟 Run Report 🗸 🛙	🛪 Email a Link 🛛 🗸 🖋 Flow 🗡 🖷 Exe	cel Templates \vee
 ☆ Home ◆ Recent ✓ 	All Cases ~		7	V Average order X
	Hide Empty Lanes	Business Process Flow	1 ×	Created On $ \smallsetminus $
My Work	In Progress ↓ 1 Case Title ∨ ⊕	$\begin{array}{c c} & \text{On Hold} \\ & \downarrow \ 0 & \text{Case Title} & \checkmark \end{array} \begin{array}{c} & & \\ & & \\ \end{array}$	Waiting for Details ↓ 0 Case Title	Researching \downarrow 0 Case Title
影 Dashboards ② Activities	Average order shipment ti 02-08-2020 16:00	No data available.	No data available.	No data available.
Customers				
Accounts				
久 Contacts 冈 Social Profiles				
Service				
🖉 Cases 🔻				
S Service	1 - 1 of 1 (0 selected)			$i \leftarrow \epsilon$ Page 1 \rightarrow

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

The Kanban Board supports the ability to sort the cards in ascending or descending order of the field selected. You will be allowed to sort the cards based on the fields used in the card view.



In addition to the quick search option, it also supports filtering of the records based on the "CreatedOn" date.

🛱 Show Chart 🕂 New Case 📋 Delete 🛛 🗸 🖒 Refresh 🗐 Run Report 🗸 🖾 Email a Link 🛛 🗸 🕫 Flow 🗸 🖷 Excel Templates 🗸 🔩 Export to Excel 🗠 🗄							
		$ abla$ Search this view $oldsymbol{ ho}$					
Phone	e to Case Process 🛛 🗸	Created On \sim					
Research	Resolve	Today					
\downarrow 4 Case Title \checkmark \pm	\downarrow 1 Case Title \checkmark \pm	Yesterday					
		This Week					
Average order shipment 02-08-2020 16:00	Defective item delivered (24-07-2020 10:00	Last Week					
Active for a month	Active for a few seconds	This Month					
		Last Month					
		Month To Date					
Complete overhaul requi		This Year					
Active for a month		Last Year					
		Custom Period >					
		Reset Time Frame					
	Phone Research ↓ 4 Case Title ∨ ⊡ A Average order shipment 02-08-2020 16:00 Active for a month ↓ Complete overhaul requi 02-08-2020 10:00	Phone to Case Process ✓ Research ↓ 4 Case Title ✓ A Average order shipment 02-08-2020 16:00 Active for a month Complete overhaul requi 02-08-2020 10:00 Active for a few seconds Complete overhaul requi 02-08-2020 10:00 Active for a month ✓ Complete overhaul requi 02-08-2020 10:00 Active for a month ✓ Complete overhaul requi Complete					

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