



User Manual

P a g e 1 of 49

Content

Introduction	3
Assigning Security Role	3
Kanban Board Configuration	4
Configuration for Specific View	21
Configuration for Subgrid	26
Configuration for Personal View	31
Kanban Board Features	
Contact Us	49

Introduction

Kanban Board is a productivity app to visualize your Dynamics 365 and Dataverse (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
- Support to view aggregate field value of records
- Support to sort records in Kanban View at global level

Available for: Microsoft Dynamics 365 v9.1 onwards, Dataverse (Power Apps).

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.

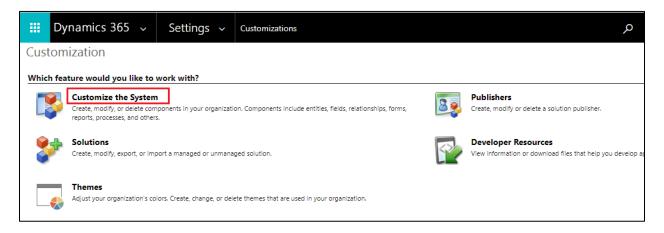
1) Click on gear icon at top right \rightarrow Select Advanced settings.

	Dynamics 3	65 🗸	Sales Hub Sales > Accounts			مر	ଷ ସ	+	Y	ନ୍ଟ	٢	?
=			☐ Show Chart + New	🕻 Log In 🛛 Email a	a Link 🛛 🗸 💅 Flow	√ II	Perso	nalization S	Settings			
ŵ	Home	^	My Active Accounts $$				Advar	ced Settin	gs		5	, p
	Recent Pinned	$\overset{\sim}{\checkmark}$	✓ Account Name î ∀	Main Phone 🛛 🖓	Address 1: City 🛛 🍸	Primary Cor		Notificatio	n Display	/ T		7
~			Alpine Ski House	+43-1-12345-0	Vienna	Cathan Co		y & Cookie	25			se.com
My	Work		Consolidated Messenger	+09-70-01-90-90	Paris	Forrest Ch	Softw	are license	terms			messeng
	Dashboards		Microsoft	1-555-555-0135	1 Microsoft Way	Isaac Ligh	tner		isaac.lig	ghtner@	onemic	crosoft.cc
2	Activities		School of Fine Art	+011-1-399-555-9000	. Mississaugua	Shaun Bea	isley		info@f	ineartscl	nool.net	t
Cust	tomers		Tailspin Toys	297-555-0192	Tokyo	Marco Tar	nara		mtanar	a@tailsp	pintoys.	com
	Accounts		Trey Research	+49-(0)89-0110-0	Munich	Humberto	Acevedo		info@t	reyresea	rch.net	
8	Contacts		Wide World Importers	+90-211-001-1234	Istanbul	Sean Chai			info@v	videworl	dimpor	ters.com

2) Then go to Settings \rightarrow Customizations.

	Kanban Board –	User Manual	
🗰 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	号 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
ငှံ(၃ Sync Error		Auditing	

3) Next click on Customize the System.



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

PowerApps					
File	ncies 🛛 🗧 Solution Layers 🛛 🔥 Publish 🛛 🚰 Managed Pro	perties			
Case					
Solution Default Solution	General Primary Field Controls				
D 🎝 Campaign Activity 🔺	Control	Web	Phone	Tablet	
Campaign Response					
▷ 📑 Case Resolution	Read-only Grid (default)	۲	۲	۲	
Case to Work Order	Add Control				
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 con		
Editable Grid		
Kanban Board		
Read Only Grid		
Time Entry Grid		•
Kanban Board		
Modes: Types: Grid		
Kanban Board is a produ that enables organized o view of Entity records in Records are systematica	card-based home grid.	

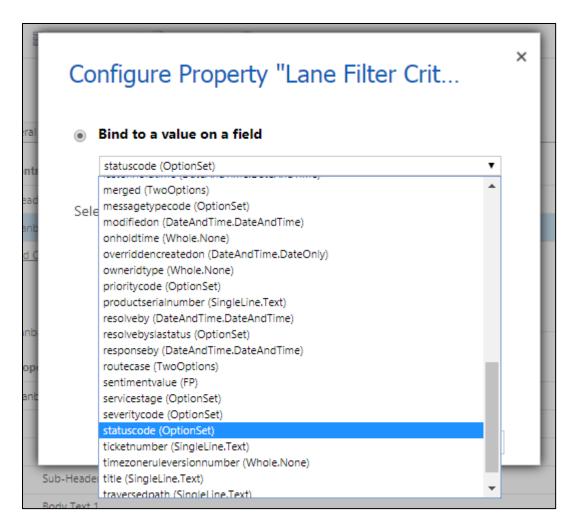
6) The radio button before Kanban Board denotes by default which control is to be loaded for Case Entity i.e. CRM OOB Grid (Read-only) or Kanban Board. If you want to display Kanban Board on Web (Computer or laptop devices) then select Web Radio button before Kanban Board. Similarly, you can select Phone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

eneral Primary Field Controls				
Control	Web	Phone	Tablet	
Read-only Grid (default)	0	0	0	
Kanban Board	R	۲	۲	×
Add Control	Use C	Control "Kanban Bo	pard" 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.

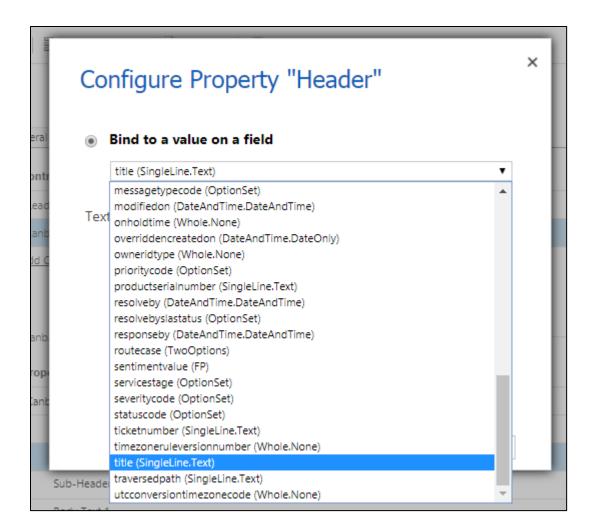
ntrol		Web	Phone	Tablet	
ead-only Grid (default)					
Canban Board		۲	۲	۲	×
dd Control					
Kanban Board					
Property	Value				
Kanban Board Grid View					
Lane Filter Criteria *					Ø
Row Filter Crieria					Ø
Header					Ø
					Ø



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.

Bind to a valu prioritycode (Op			~	
	d on which Rows ar	e created		
				- 1

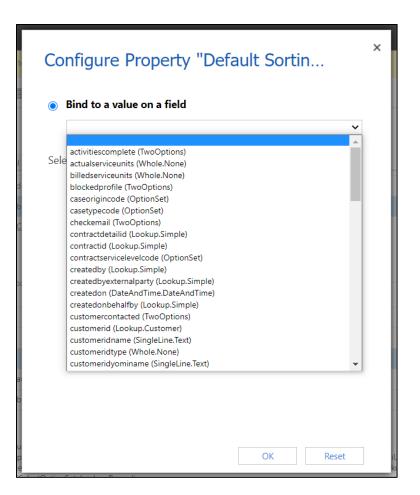
9) For Header - Select the field value that is to be displayed on header of card. In similar way populate the Sub-Header fields.



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.

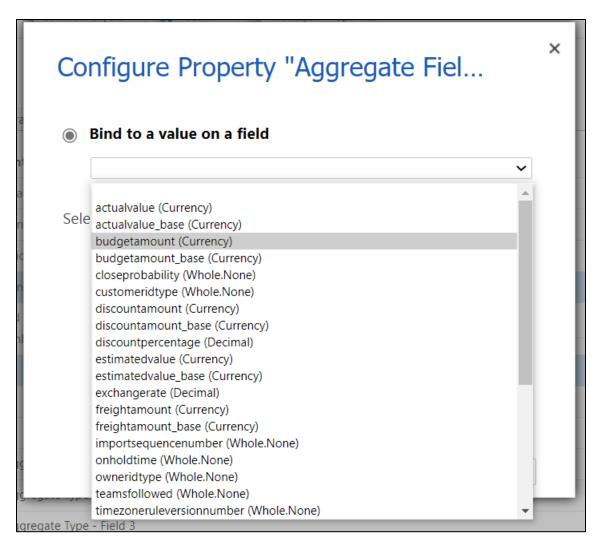
Kanban Board		
	-	
Sub-Header	Ø	
Body Text 1	Ø	
Body Text 2	Ø	
Body Text 3	Ø	

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



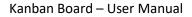
12) For Aggregate Field 1 – Select any fields with numeric, decimal or currency datatype. For example, budget amount, actual value, exchange rate, etc. Similarly, select the field values for Aggregate Field 2 & Aggregate Field 3.

Kanban Board		
Aggregate Field 1	P	•
Aggregate Field 2	Ø	
Aggregate Field 3	Ø	
Aggregate Type - Field 1	Ø	
Aggregate Type - Field 2	Ø	
Aggregate Type - Field 3	Ø	-



13) For Aggregate Field Type 1 – Select either Sum, Max, Min or Avg. Based on this, the aggregate value of the above chosen fields will be represented on lane and row headers in the Kanban View. If a value is not selected, then 'SUM' will be taken as default value. Similarly, select the values for Aggregate Field Type 2 & Aggregate Field Type 3.

Aggregate Field 1	Ø	^
Aggregate Field 2	Ø	
Aggregate Field 3	Ø	
Aggregate Type - Field 1	Ø	
Aggregate Type - Field 2	Ø	
Aggregate Type - Field 3	Ø	-



		"Aggregate	
Bind to :	static options		
			~
SUM MAX MIN AVG			
	gregate Type for Ag	ggregate Field 1 (de	fault SUM)

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

	Property "Default Sortin
Bind to stat	tic options
Ascending	
Descending	
}y Default Sortir	ng Direction i.e. Ascending or Descending (default)

15) 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.

Configure Property "Enable Busine				
Bind to a static value				
SingleLine.Text				
 Bind to a value on a field 	~			
Y = Enable(default), N = Do not Enable. Note: If any Business Proce Flow is Selected, Row Filter Criteria will be disabled	SS			
OK Reset				

16) 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.

Bind to a static value	
SingleLine.Text	← email,phonecall,task
Bind to a value on a f	field
	*
Enter upto 3 logical name	or activity type entity Eg.

17) 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.

	erty "Card Collapse	
SingleLine.Text	V Y	
Bind to a value on a	field	
		~
efault card collapsed to	be opened i.e Y = collapsed, N =	
xpand(default if none e	ntered)	
kpand(default if none ei	ntered)	

18) 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	
iban 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)	Ø

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

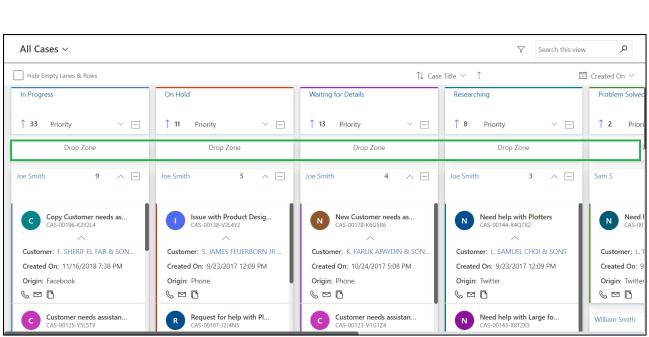
Power Apps							
File	encies 🛛 블 Solution Lay	ers Dublish	The managed Properties				
Case Information Oution Default Solution	General Primary Fie	eld Controls					
 Log Business Closure Business Unit 	Kanban Board			۲	۲	۲	×
	Add Control						
▷ IS Case Resolution ▷ Z Case to Work Order	Kanban Board						
Category	Header		title (SingleLine.T	ext)			Ø
CFS - IoT Alert Proc A channel	Sub-Header		ticketnumber (Si	ngleLine.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 Property G Channel Provider 	Body Text 3		casetypecode (O	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:

All Cases ~				$\overline{\mathbb{Y}}$	Search this view 🔎
Hide Empty Lanes & Rows			1↓ Case 1	Title \vee \uparrow	🛅 Created On 🗸
In Progress	On Hold	Waiting for Details	Researching	Problem Solved	Information Provided
↑ 33 Priority ∨ 🖃	↑ 11 Priority ∨ 🖃	↑ 13 Priority ∨ 🖃	↑ 8 Priority ~ —	↑ 2 Priority ∨ 🖃	↑ 2 Priority
High	High 4 \land \pm	High 2 🔨 🕂	High 1 ^ 🕂	High	High 1
Normal 27 A 🕂	Issue with Product Designer CAS-00138-V2L4Y2	Customer needs assistanc CAS-00122-P9T4M5	Need help with Plotters CAS-00144-X4Q7X2	Normal 2 🔨 🕂	Question about 3D CAS-00149-H9S4S1
Copy Copy Customer ne CAS-00197-R4C1K2				Need help with 3D Printers CAS-00142-K1L9D6	
	New Customer needs assi CAS-00180-X582X9	Issue with 3D Computer-a CAS-00126-J5G356	Normal 5 🔨 🕂		Normal
Copy Customer needs as CAS-00195-F8H5M8			Case of A Damc CAS-00230-Y2D7W3	Test CAS-00226-L2W6R9	Low 1
	Question about Large for CAS-00153-C7F3T0	Normal 2 A 🕂			N Need help with 3D CAS-00141-P5D1Z2
Customer needs assistan CAS-00119-S7H9Z7		Issue with Large format p CAS-00135-W7L3R3	Customer needs assistan CAS-00114-C9Z8K3	Low	~ ·
	Request for help with Plot CAS-00166-C4D1K6	CAS-00135-W/L3R3	CAS-00114-C928K3	Other (Blank)	
	~				Other (Blank)
New Customer needs as CAS-00174-J6H7Z2		Issue with Product Designer	Issue with 3D Computer		

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

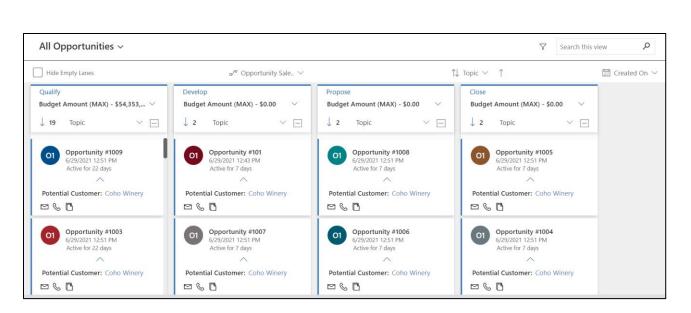


3) With Business Process Flow, you will get the following view:

All Opportunities \sim			abla Search this vi	ew P
Hide Empty Lanes & Rows	$_{\rm p}\!\prime^{\rm a}$ Business Process Flow \smallsetminus	Ţ.	↓ Topic ∨ ↑	🛗 Created On \vee
In Progress Exchange Rate (MIN) - 1.00 ∨ ↓ 16 Topic ∨ ⊡	On Hold Select Business Process Flow Budget At →+ -0+ Purchase Process Flow ↓ 4 →+ -0+ Opportunity Sales Process	Von iudget Amount (MAX) - \$20,000 2 Topic	Canceled Budget Amount (MAX) - \$0.00 ∨ ↓ 2 Topic ∨ ⊡	Out-Sold Budget Amount
Drop Zone	Switch to Default Board	Drop Zone	Drop Zone	Dr
Sam Kovic 15 A 🖃 Budget Amount (MAX) - \$4,534,2 🗸	Sam Kovic 4 A — Budget Amount (MAX) - \$43,243, Y	Sam Kovic 2 \land \square Budget Amount (MAX) - \$20,000 \checkmark	Sam Kovic 2 \land \square Budget Amount (MAX) - \$0.00 \checkmark	Sam Kovic Budget Amount (I
Opportunity #1006 6/29/2021 12:51 PM	Opportunity #101 6/29/2021 12:43 PM	10 orders or Product SK 6/17/2021 3:23 PM	Opportunity #1008 6/29/2021 12:51 PM	01 Opport
Potential Customer: Coho Winery	Potential Customer: Coho Winery	Potential Customer: Litware, Inc	Potential Customer: Coho Winery	Potential Custor
01 Opportunity #1004	Opportunity #1009	10 orders of Product SK	O1 Opportunity #1007	

P a g e 18 of 49

Kanban Board – User Manual



4) With Aggregate Fields, you will get the following views: Aggregate field values displayed on lane header

All Opportunities \vee			Search this vie
Hide Empty Lanes & Rows	$_{\rm D}\!/^{\rm G}$ Business Process Flow \smallsetminus	Ţ.	↓ Topic 〜 ↑
In Progress Exchange Rate (MIN) - 1.00	On Hold Budget Amount (MAX) - \$43,243, ∨	Won Budget Amount (MAX) - \$20,000 🗸	Canceled Budget Amount (MAX) - \$0.00 V
-04 Budget Amount (MAX) - \$54,353,	↓ 4 Topic ✓ □	↓ 2 Topic ∨ □	↓ 1 Topic \checkmark \square
A Exchange Rate (MIN) - 1.00 → Actual Revenue (SUM) - \$0.00	Drop Zone	Drop Zone	Drop Zone
Sam Kovic 16 \frown \Box Budget Amount (MAX) - \$4,534,2 \checkmark	Sam Kovic 4 A -	Sam Kovic 2 ~ — Budget Amount (MAX) - \$20,000	Sam Kovic 1 ^ Budget Amount (MAX) - \$0.00
Potential Customer: Coho Winery	Opportunity #101 6/29/2021 12:43 PM	10 orders or Product SK 6/17/2021 3:23 PM	Opportunity #1008 6/29/2021 12:51 PM
Opportunity #1003 6/29/2021 12:51 PM	Potential Customer: Coho Winery	Potential Customer: Litware, Inc	Potential Customer: Coho Winery
Potential Customer: Coho Winery	Opportunity #1009	10 orders of Product SK	

Aggregate field values displayed on row header

All Opportunities ~			𝕎 Search this vie	Q w
Hide Empty Lanes & Rows	$_{\rm D}$ /a Business Process Flow $ \smallsetminus $	↑,	↓ Topic ∨ ↑	🛅 Created On 🗸
In Progress Exchange Rate (MIN) - 1.00 ∨ ↓ 16 Topic ∨ □	On Hold Budget Amount (MAX) - \$43,243, ∨ ↓ 4 Topic ∨ ⊡	Won Budget Amount (MAX) - \$20,000 ∨ ↓ 2 Topic ∨	Canceled Budget Amount (MAX) - \$0.00 ∨ ↓ 2 Topic ∨ ⊡	Out-Sold Budget Amount (J 1 Topic
Drop Zone	Drop Zone	Drop Zone	Drop Zone	Dro
Sam Kovic 15 A - Sam Ko	Sam Kovic 4 A - Budget Amount (MAX) - \$43,243, V	Sam Kovic 2 A - Budget Amount (MAX) - \$20,000	Sam Kovic 2 A 🖂 Budget Amount (MAX) - \$0.00	Sam Kovic Budget Amount (N
Opportunity #1006 6/29/2021 12:51 PM	Opportunity #101 6/29/2021 12:43 PM	-04 Budget Amount (MAX) - \$20,000 -04 Exchange Rate (MIN) - 1.00	Opportunity #1008 6/29/2021 12:51 PM	01 Opportu 6/29/2021
Potential Customer: Coho Winery	Potential Customer: Coho Winery	Potential Customer: Litware, Inc	Potential Customer: Coho Winery	Potential Custom
01 Opportunity #1004	Opportunity #1009	10 orders of Product SK	O1 Opportunity #1007	

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.

\cdots Dynamics 365 \vee	Sales Hub Sales > Cases	P Ø Q + 7
=	🛱 Show Chart 🕂 New Case 🛍 Delete 🗸 🖒 Refresh 🚺 Log In 🛅 Run Report 🗸	🖾 Email a Link 🛛 🗸 🖍 Plow 🗸 \cdots
 G Home (¹) Recent ∨ 	All Cases 🖂	🕮 Excel Templates >
S Pinned ∨	✓ Case Title ↑ $𝔅$ Case Number $𝔅$ $𝔅$ Priority $𝔅$ $𝔅$ Origin	Export to Excel
	Average order shipment time CAS-01213-P8B3X0 Normal Web	Import from Excel
My Work	Complete overhaul required CAS-01214-S6Z4Z6 Normal Web	Deen Dashboards
변 Dashboards	Contact details requested CAS-01215-N0Y1T2 Normal Email	
Activities	Customer Contact Information CAS-01216-L3S7F2 Normal Email	
Customers	Delivery never arrived CAS-01219-H6B9P4 Low Phone	e Alpine Ski House 💿 Sam P
Accounts	Dysfunctional Litware Laptop Keyboard X105 CAS-00055-V8L7L7 Normal Web	Graphic Design Institut 🛛 Jamie Redir
A Contacts	Faulty product catalog CAS-01220-S1K8F4 Normal Email	Fourth Coffee O Kelly Krout
Sales	Incorrect product information online CAS-01222-S6G5J0 High Email	Litware O Anne Weile
& Leads	Information on the product CAS-01223-Z6Y4Y1 Low Email	Consolidated Messeng 💿 Sam P

III Dynamics 365 🗸	Sales Hub Sales > Cases	ନ ଓ ଜ +	- v & @ ?
=	🛱 Show Chart + New Case 🛍 Delete 🗸 💍 Refresh 🕻 Log In 📓 Run Report 🗸 🖾	Email a Link $ $ \checkmark $_{\rm e'}$ ^a Flow	~ …
☆ Home	All Cases 🗸	(P. I.	ch for records
🕒 Recent 🗸 🗸		Generation Board	
🖈 Pinned 🗸 🗸	✔ Case Title ↑ ♥ Case Number ♥ Priority ♥ Ørigin	Et Kanban Board	∑ Status
	Average order shipment time CAS-01213-P8B3X0 Normal Web	Litware C	D Christa Geller (Samı Active
My Work	Complete overhaul required CAS-01214-S6Z4Z6 Normal Web	Consolidated Messeng	D 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.

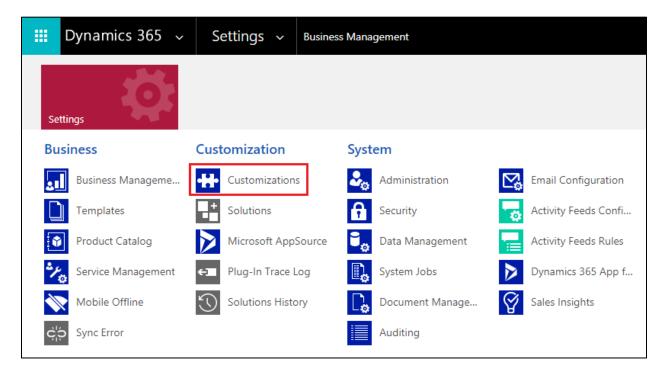
← 🖾 Show Chart + New Case 🗎 [Delete 🖂 🕐 Refresh 🛭 😚 Detail Map	🗞 Heat Map 🛛 🗭 Log In 🖉 Run Report	✓ Eig Email a Link ✓ ∑ Flow ✓	:
All Cases ~		∱↓ Case	← Back	₽ :ed On ∨
In Progress	On Hold	Waiting for Details	Researching	Problem Solve
\uparrow 33 Priority \checkmark	\uparrow 11 Priority \checkmark \square	\uparrow 13 Priority \checkmark	↑ 8 Priority ~ ⊡	↑ 2 Prior
High	High 4 ^ 🖃	High 2 🔨 🕂	High 1 🔨 🕀	High
Normal 27 🦳	1 Issue with Product Desig CAS-00138-V2L4Y2	Customer needs assistanc CAS-00122-P9T4M5	Need help with Plotters CAS-00144-X4Q7X2	Normal
C Copy Copy Customer ne CAS-00197-R4C1K2				N Need CAS-0
	New Customer needs as CAS-00180-X582X9	Issue with 3D Computer-a CAS-00126-J5G356	Normal 5 A 🖃	6 • •

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	ettings ~ Customization	s			ድ
Apps for Dynamics 365 View Dynamics 36	0	Solution: Default Solution - Microsoft	t Dynamics 365 - Googl	e Chrome	- 🗆 🗙
Customization	Caonite.crm8.dynamics.co	m/tools/solution/edit.aspx?id=%7bfd140a	af-4df4-11dd-bd17-0019	b9312238%7d	
Which feature would you like to work Customize the System Create, modify, or delete compone reports, processes, and others.	Try New Experience There's a	better way to customize the system Try New Exp		Publish All Customization	s Actions •
Solutions Create, modify, export, or import a	File Solution: Default Solution		100 13	3 2	@ 0
Themes Adjust your organization's colors. Q	Solution Default Solution Information Components	Component Type All	T how Dependencies	ution Layers 🛛 😭 Manage	ed Properties
	Components Entities Option Sets	□ Display Name ↑	Name	Туре	State
	Client Extensions Web Resources		sdkmessage_autotran	Option Set	Managed
	Processes + Plug-in Assemblies		subscriptionstatisticso	Option Set	Managed
	Sdk Message Processin Service Endpoints		organization_featuree	Option Set	Managed
	Dashboards		flipswitch_options	Option Set	Managed
	Reports		[Doprocated] Dialog f	Dialog Poy	Managad +
	Article Templates	1 - 50 of 8145 (0 selected)		K 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 🗙 🛛 🌀	9	Solution: Default Solut	ion - Microsoft Dynamics 36	5 - Google Chror	ne	- 🗆 🗙
\leftrightarrow \rightarrow C $$ cac	Caonite.crm8.dynamics.con	n/tools/solution/edit.aspx?id=%	57bfd140aaf-4df4-11dd-bd17-	0019b9312238%7	d#	
Dynamics 3	III PowerApps					
Apps for Dynamics 365	Try New Experience There's a	better way to customize the system	Try New Experience			×
Customization	File Publish All Customizatio	ns				<u> @</u> <u>H</u> elp ▼
Which feature would y	Account Views Solution Default Solution					
Create, modify, reports, process	Information Components	View: All Active Views	•			•
Solutions Create, modify,	Entities Account	Name	Туре	State	Customizable	Description
	Forms	All Accounts	Public View	Managed	True	^
Adjust your org	Charts	Quick Find Active Acco	unts Quick Find View	Managed	True	
	🕎 Keys 😅 1:N Relationships	Accounts: Responded t	o Camp Public View	Managed	True	
	🚰 N:1 Relationships	Vendors	Public View	Managed	True	
	Messages	Account List Member \	/iew Associated View	Managed	True	Displays informat
	Hierarchy Setti Hierarchy Setti	My Connections	Public View	Managed	True	Shows all active i
	 Account Project Pri Action Card Action 	Account Lookup View	Lookup View	Managed	True	

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

a caonite.crm8.dynamics.com/te	ools/solution/edit.aspx?id=%7bfd140aaf-4df4-11dd-bd17-0019b93122389	67d#
PowerApps		
•	View: All Accounts - Microsoft Dynamics 365 - Google Chrome	- • ×
i ry	nics.com/tools/vieweditor/viewManager.aspx?id=%7b65FFAF9A-E8C5-432	D-860B-32F841B00D87%
File III PowerAp		@ <u>H</u> elp ▼
	Custom Controls	
File 📓 🔚 Save As	Set the custom control properties.	@ <u>H</u> elp *
Solution D		n solution: Default Solution
🐉 Inform		<u>^</u>
Compo Compo Account Name	Control Web Phone Tablet	Common Tasks
⊿ ₽	Read-only Grid (default)	$\leftarrow \rightarrow$
	Add Control	
		Custom Controls
		Configure Sorting
		Add Columns
		C Change Properties
•		Remove
		active i
Image: Second state state Image: Second	Select or add a custom control to see its configuration.	•
	OK	Accoun 🗸
⊳ Z		
 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'.

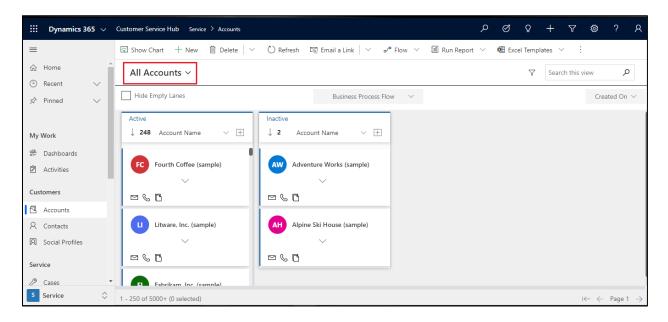
•	View: All Accounts - Microsoft Dynamics 365 - Google Chro	ome – 🗆 🗙
a caonite.crm8.dynami	cs.com/tools/vieweditor/viewManager.aspx?id=%7b65FFAF9A-E8C5	-432D-860B-32F841B00D87%
III PowerAp	Custom Controls	
File Save As	Add Control Select a custom control from the field.	X @ Help +
Account Name	CC_SimilarCases_GridControl_Name	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.

III POWE	soft Dynamics 365 - Google Chrome						- 🗆 🗙	
Try New Exper	amics.com/tools/vieweditor/vie	wManager	.aspx?id	=%7b65F	FAF9A-E8	3C5-432	D-860B-32F841B00D8	×
File Publis	Custom Controls Set the custom control prope	erties.				×	@Help ·	@ <u>H</u> elp +
Account View Solution Default Solu							n solution: Default Solution	
-	Control	Web	Phone	Tablet			Common Tasks	· · ·
Components Account Name Components	Read-only Grid (default)	0		0				
▲ Ccount	Kanban Board	۲	۲	۲	×		$\leftarrow \rightarrow$	(5
E Form					^			ic
View:	Add Control						View Properties	-
Charl							Custom Controls	
W. Keys	Kanban Board						Configure Sorting	
⊂ 1:N R							Les Configure Sorting	
2 N:1 R	Lane Filter Criteria *			6	2		🛱 Add Columns	nts for Campai
	Row Filter Crieria			6	1		Change Properties	
Mess 🛛 🖉 Busin	Header				1		Remove	
A Hiera				-				
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Action Ca Note: When there are to	Body Text 1			6	1		*	instances of th
Action Ca								
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Address			_		_	_	-	-
Address 1 - 19 o	f 19 (1 selected)						4 ∢	Page 1
Al Builder Dataset								
Al Builder Dataset F		Kanhan Boa	rd - User	Manual de	ocx - Word	4		

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

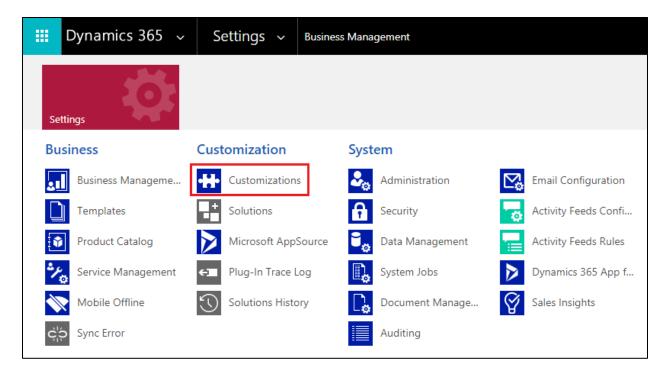


Configuration for Subgrid

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.



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								
ution Default Solution	Syster	n Forms Active Forms 🗸						
Components	Nev	/ 🕶 🗙 Delete 🛛 🐔 Enable Security	Roles 🛛 👼 Fo	rm Order 🕶 🛛 浸 Activa	te 🛛 🂐 Deacti	vate More Actions	•	
Entities Deprecated] Data Deprecated] Dyna		Name	Form State	Form Type 🛧	State	Customizable	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	Upda
📒 Fields 🛒 Keys		Account	Active	Main	Managed	True	5.0.0.0	Upd
😋 1:N Relationships 🍄 N:1 Relationships		Account Quick Create	Active	Quick Create	Managed	True	6.0.0.0	Defa
器 N:N Relationshi 🔚 Messages		Account Hierarchy Tile Form	Active	Quick View F	Managed	True	7.0.0.0	This
📴 Business Rules 🎝 Hierarchy Settin		Social Profiles	Active	Quick View F	Managed	True	6.1.0.0	A for
Dashboards Card Action		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.

Power App	s	
FILE HOME INSERT		0
Save As Save As Save Dublish Save	Change Remove Change Enable Security Roles Edit Select Form Properties Form Preview Managed Properties Form Upgra	rge rms
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 Form: Account	Field Explorer
 Details Files KanbanTab Assets and Locations 		Filter All Fields
Common	KanbanTab	Account Rating
Playbooks	Section	Address 1: Address Type
📝 Activities	Cases (Customer)	Address 1: City
Social Profiles		Address 1: Country/Region
🛐 Contacts		Address 1: County
Documents		Address 1: Fax
Sonnections		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

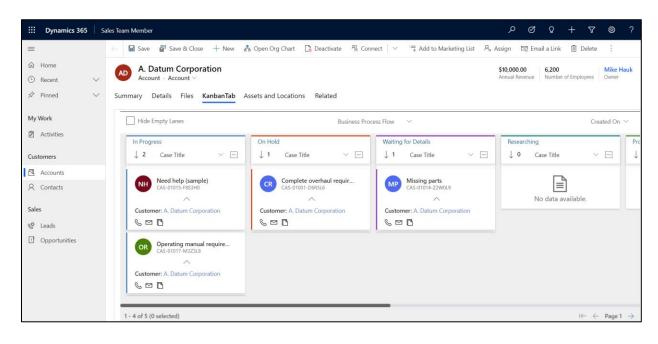
5) Now select the tab \rightarrow Click on 'Change Properties' \rightarrow Go to 'Display' \rightarrow Select the required details.

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
		OK Cancel	Addre
ds	Assets and I		Addres

6) Next go to 'Controls' \rightarrow Enable Kanban Board for Web, Phone and Tablet.

Set the El	st or Chart p	roperties.					
Display	Formatting	Controls					
Contro	I		Web	Phone	Tablet		
Read-o	only Grid (defau	ılt)	\bigcirc	\bigcirc	\bigcirc		
Kanba	n Board			igodoldoldoldoldoldoldoldoldoldoldoldoldol		×	
Add Co	ntrol						
Kanba	n Board						
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Kanba	n Board Grid V	iew All Cas	es				L
	ane Filter Crite	ria* statusc	ode (Opt	tionSet)		Ø	
	Row Filter Crieri	а				Ø	
	Header	title (Si	ngleLine.	Text)		Ø	
						~	

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



P a g e 30 of 49

Configuration for Personal View

In a similar way, Kanban Board can be configured for **Personal Views** created by the users.

To add Kanban Control on **Personal View** follow the steps given below:

1) Go to Advanced Find \rightarrow Select the personal view to which Kanban Control is to be added.

Dynamics 365 Sales Hi	ub	م	Ø	Ŷ	+	∇
\equiv \leftarrow	☞ Save As 🕂 New 🗸 🗸 Set As Default 🖒 Refresh All					J
Image: Mome Image: Mome Image: Mome Image: Mome Image: Mome Image: Mome Image: Mome Image: Mome	Sales Activity Social Dashboard ~					
🖈 Pinned 🗸 🗸	My Open Opportu 🖬 Expand Chart 🗄 My Open Leads 🖾 Expand	Chart :		Assistan	t	
My Work	Sales Pipeline Leads by Source			Notifica	ations	
비판 Dashboards	 (blank) 1-Qualify 2 2-Develop (blank) Advertisement Other 	r 😐 Irade 🕨			4 upco	ming me
Activities						
FILE ADVANCED FIND	Edit Columns ↓ Save As ↓ Group AND ↓ Group OR					I
Query Saved Results Views	New Save Clear Clear Download Fetc	h				
Show	View Query Debug					
Look for: Opportunities	✓ Use Saved View. View_2					
✓ <u>Created By</u> Select	Equals Current User My Connecti My Open Oppor Opportunitie Opportunitie Opportunitie Opportunitie Opportunitie Opportunitie Opportunitie Opportunitie Opportunitie Opportunitie Recent Oppor Recent Oppor Won Opport My Views 1 Opportunitie View_2	portunities nities with Pa tunities s Being Folla s Closing Na s Forecast V s I am a me s I Follow s in Current s Opened La s Opened Ti s with Partn ortunities ortunities for unities	owed ext Mo fiew mber o Fiscal ast We his We er Mar r Intera	onth Of Year ek ek rgin		Form

2) Click on 'Edit Columns'.

FILE	ADVA	NCED FIND							
Query	Saved Views Show	Results	New	Save	Edit Properties	2 Clear	[∰ Group AND [∰ Group OR ➡ Details Query	Download Fetch XML Debug	
Look	for: Opp	ortunities				~	Use Saved View:	View_2	
~	Created E Select	<u>3y</u>		Equals	s Current User				

3) Click on 'Custom Controls'.

	Bill To Customer	Est. Revenue	Status Reason	Common Tasks
	View results are displayed here.			← → Custom Controls Configure Sorting Add Columns Change Properties Remove
1				

4) Click on 'Add Control'.

Control	Web	Phone	Tablet	
Read-only Grid (default)	0	0	•	
Select or add a custo	m control t	o see its	configuratior	n.

5) Select 'Kanban Board' \rightarrow Click on 'Add'.

Add Control Select a custom control from the field.	×
Kanban Board	^
Map My Connections	
Maplytics – Detail Map Control	
Maplytics – Map View Control for Dataset	-
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 in	
Add	

6) Now configure the Kanban Board as per your requirement \rightarrow Click on 'Ok'.

Control	Web	Phone	Tablet		
Read-only Grid (default)	0	\bigcirc	\bigcirc		
Kanban Board	۲	\bigcirc	۲	×	
Kanban Board Lane Filter Criteria * Row Filter Crieria	purchaseproces	s (OptionS	et)	0	•
Header Sub-Header	name (SingleLin			D	
Body Text 1	createdby (Look estimatedclosed			0	
Body Text 2	estimatedvalue	(Currency)		Ø	-

7) Again click on 'Ok' \rightarrow Then click on 'Save' to add the control to the personal view.

	Bill To Customer	Est. Revenue	Status Reason	Common Tasks
				$\leftarrow \rightarrow$
				Custom Controls
Vie	w results are displayed here.			Configure Sorting
	n reparts are angrayed nerer			Add Columns
				Change Properties
				Remove
_			Þ	
			•	

	Kanban Board – Use	r Manual	
FILE ADVANCED FINE Query Saved Results Show	New View	Clear (Group AND Clear Clear Query	Download Fetch XML Debug
Look for: Opportunities	Equals Current User	✓ Use Saved View:	View_2
Select			

8) Now the personal view will be displayed in Kanban View.

Dynamics 365 Sa	ales Hub			+ ۵ ک ج	S (\$ \$ \$
=	\leftarrow \textcircled{G} Show Chart $+$ New $\textcircled{1}$ Delete	e 🗸 🕒 Click2Export 🖔 Refresh 💰	' Detail Map 😚 Heat Map 🚺 Log In 🛛	🗟 Email a Link 🗸 🔊 Flow 🗸 🥰 Al	Builder \vee 🗐 Run Report \vee 🗄
	View_2 ~				
 ③ Recent ∨ ✓ Pinned ∨ 	Hide Empty Lanes & Rows		Business Process Flow $\qquad \curlyvee$		Created On $ \smallsetminus $
My Work 新 Dashboards	In Progress Est. Revenue (SUM) - \$1,673,40 ∨ ↓ 34 Topic ∨ □	On Hold Est. Revenue (SUM) - \$73,200.0 ∨ ↓ 2 Topic ∨ □	Won Est. Revenue (SUM) - \$467,600 ∨ ↓ 12 Topic ∨ [=]	Canceled Est. Revenue (SUM) - \$73,000.0 ∨ ↓ 2 Topic ∨ □	Out-Sold ↓ 0 Topic ∨ ⊟
 Activities Customers 	Individual 3 A 🕀	Individual 1 \land \pm	Individual	Individual	Individual
Accounts A Contacts	Exchange Rate (AVG) - 1.00 C Canberra Imaging Group Sam S	Est. Revenue (SUM) - \$48,200.0 Calvary North Adelaide H Sam S	Committee	Committee	Committee
Sales		~	Unknown	Unknown	Unknown
Opportunities Competitors	CH Campbelltown Private Ho Sam S	Committee 1 <u> </u>	Other (Blank) 12 <>> + Est. Revenue (SUM) - \$467,600 <>>	Other (Blank) 2 < + Est. Revenue (SUM) - \$73,000.0 <	Other (Blank)
Collateral	CH Campbelltown Hospital	CH Canossa Private Hospital Sam S	Calvary Mater Newcastle Sam S	CH Calvary Public Hospital Sam S	
Corders Corde			Calvary Hospital	Bonalbo Hospital	

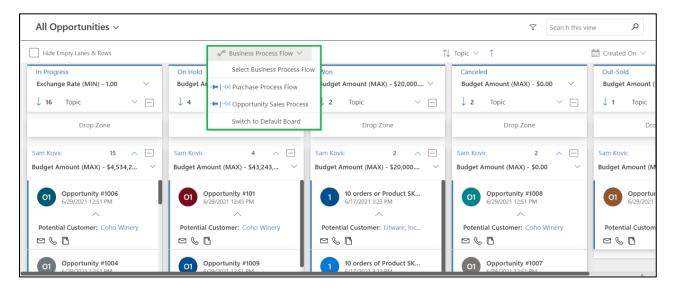
Kanban Board Features

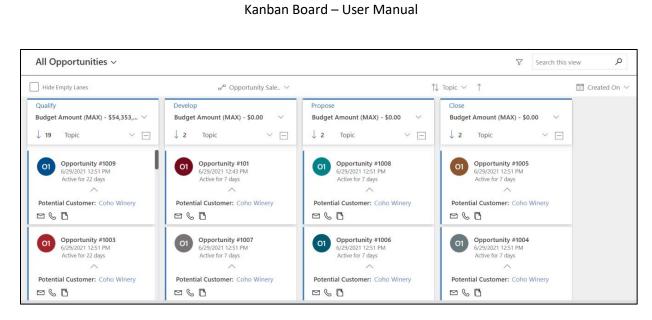
Kanban Board provides an organized view of records on home grid. Its various features helps to systematically organize records as per requirement. Let's have a look at these features of Kanban Board:

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.





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

All Opportunities ~				ew P
Hide Empty Lanes & Rows	$_{\rm p}/^{\rm cr}$ Business Process Flow $ \smallsetminus $	1	Î↓ Topic ∨ 👔	fine The test and the test and the test and te
In Progress	On Hold	Won	Canceled	Out-Sold
Exchange Rate (MIN) - 1.00 V	Budget Amount (MAX) - \$43,243, ~	Budget Amount (MAX) - \$20,000 ~	Budget Amount (MAX) - \$0.00 V	Budget Amount
↓ 16 Topic ✓ —	↓ 4 Topic ~ _	↓ 2 Topic ✓ —	↓ 2 Topic ✓ —	J Topic
Drop Zone	Drop Zone	Drop Zone	Drop Zone	
Sam Kovic 15 A 🖂	Sam Kovic 4 ^ -	Sam Kovic 2 🔨 🖃	Sam Kovic 2 \land \square	Sam Kovic
Budget Amount (MAX) - \$4,534,2 V	Budget Amount (MAX) - \$43,243, ~	Budget Amount (MAX) - \$20,000	Budget Amount (MAX) - \$0.00 \lor	Budget Amount (l
Opportunity #1006	Opportunity #101	10 orders or Product SK	Opportunity #1008	01 Opport
6/29/2021 12:51 PM	6/29/2021 12:43 PM	6/17/2021 3:23 PM	6/29/2021 12:51 PM	
Potential Customer: Coho Winery	Potential Customer: Coho Winery	Potential Customer: Litware, Inc	Potential Customer: Coho Winery	Potential Custo
Opportunity #1004	Opportunity #1009	1 10 orders of Product SK	01 Opportunity #1007	

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

	Configure Property "Enable Busine	×
1	Bind to a static value	
þ	SingleLine.Text 🔻	
2	Bind to a value on a field	
2	Y = Enable(default), N = Do not Enable. Note: If any Business Process Flow is Selected, Row Filter Criteria will be disabled	
b V	OK 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.

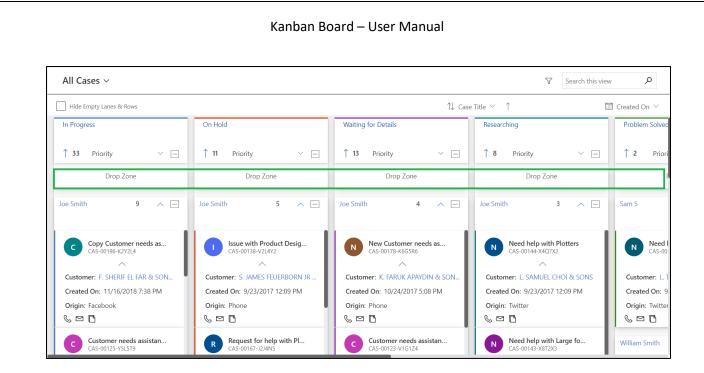
All Cases ∨ Search this view Q Hide Empty Lanes & Rows $\uparrow\downarrow\,$ Case Title $\,\,\checkmark\,\,\,\uparrow\,\,$ 🛗 Created On 🗸 In Progress On Hold Waiting for Details Researching Problem Solved Information Provided ↑8 Priority 1 33 Priority 11 Priority 13 Priority ↑ 2 Priority 1 2 Priority <u>~</u> ± <u>~</u> ± <u>∧</u> ± High High 4 High 2 High 1 High High Normal 27 🦯 🕂 Normal 2 <u>∧</u> ± Issue with Product Designer Need help with Plotters Customer needs assistanc... CAS-00122-P9T4M5 Question about 3 CAS-00149-H9S4S1 Copy Copy Customer ne... CAS-00197-P4C1V2 Need help with 3D Printers CAS-00142-K1L9D6 **⊡ ** [] ⊠ % ⊡ Issue with 3D Computer-a... CAS-00126-J5G356 New Customer needs assi... CAS-00180-X582X9 5 <u>∧</u> ± Normal Normal ⊠ & D ⊠ & C Copy Customer needs as... Test CAS-00226-L2W6R9 ⊠ % ⊡ ⊠ ∿ ⊡ Low Case of A Damc CAS-00230-Y2D7W3 Question about Large for... CAS-00153-C7F3T0 2 <u>~</u> ± Normal Need help with 3D N Customer needs assista ⊠ ∿ ⊡ C low Issue with Large format p... CAS-00135-W7L3R3 Customer needs CAS-00114-C9Z8K3 C ⊠ % B Request for help with Plot... CAS-00166-C4D1K6 Other (Blank) Other (Blank) **□ ** [] w Customer needs as... **□ \ B** Issue with Product Designe Issue with 3D Computer

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 *					Ø	
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.

Kanban Board – User Manual



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.

All Cases ∨			√ Search this view	م v
Hide Empty Lanes & Rows		↑↓ Cas	se Title ∨ ↑	1 Created On $ imes$
In Progress	On Hold	Waiting for Details	Researching	Problem Solved
↑ 33 Priority ∨ 🖃	↑ 11 Priority ∨ ⊡	↑ 13 Priority ∨ 🖃	↑ 8 Priority ∨ ⊡	↑2 Priori
High	High 4 ^ 🗆	High 2 ^ [+]	High 1 ^ +	High
Normal 27 🦳 🚍	1 Issue with Product Desig CAS-00138-V2L4Y2	Customer needs assistanc CAS-00122-P914M5	Need help with Plotters CAS-00144-X4Q7X2	Normal
Copy Copy Customer ne CAS-00197-R4C1K2		6 🖻 🛇		N Need CAS-00
	New Customer needs as CAS-00180-X582X9	Issue with 3D Computer-a CAS-00126-JSG3S6	Normal 5 🦳 📃	6 🖻 🛇
Copy Customer needs as CAS-00195-F8H5M8			Case of A Damc	T Test CAS-00
	Q Question about Large fo CAS-00153-C7F3T0	Normal 2 🦳 🖃	CAS-00230-Y2D7W3	6 • 4

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.

Power Apps						
File	ncies 🛛 🚆 Solution Layers 🔰 🚺 Publish 🛛 🚰 M	anaged Properties				<u> </u>
Case						
Solution Default Solution	General Primary Field Controls					_
LascadeGrantRevok LascadeGrantRevok CascadeGrantRevok	Control	Web	Phone	Tablet		^
Case Enrichment	Read-only Grid (default)	0	0	0		
Case Resolution Case Suggestion	Kanban Board	۲	۲	۲	×	
 Digital Suggestion Digital Suggestion Re Digital Suggestions D Digital Suggestions D<	Add Control					
 Case Topic Setting Case Topic Summary 	Kanban Board					
Catalog	Property	Value				
Catalog Assignment Category	Kanban Board Grid View					
Channel Property	Lane Filter Criteria *	statuscode (OptionSet)			Ø	
Channel Property G Channel Provider	Row Filter Crieria	prioritycode (OptionSet)			Ø	
Characteristic	Header	title (SingleLine.Text)			Ø	
	Sub-Header	ticketnumber (SingleLine.Text)			Ø	•

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.

All Cases ~				م ،،
Hide Empty Lanes & Rows		↑↓ Cas	se Title ∨ ↑	1 Created On $ imes$
In Progress	On Hold	Waiting for Details	Researching	Problem Solved
↑ 33 Priority ∨ 🖃	↑ 11 Priority ~ ⊡	↑ 13 Priority ∨ 🖃	↑ 8 Priority ∨ 🖃	↑ 2 Priori
High	High 4 ^ 🗆	High 2 ^ +	High 1 <u> </u>	High
Normal 27 🦳 🖂	Issue with Product D CAS-00138-V2L4Y2	New Customer needs as -AS-00180-X582X9	Need help with Plotters CAS-00144-X4Q7X2	Normal
Copy Copy Customer ne CAS-00197-R4C1K2				N Need I CAS-00
	Question about Large fo CAS-00153-C7F3T0	Customer needs assistan CAS-00122-P9T4M5	Normal 5 🦳 📃	Customer: L. 1
Copy Customer needs as CAS-00195-F8H5M8	Customer: Y. HARDY DALTON & SONS Created On: 9/23/2017 12:09 PM Origin: Email	Normal 2 A	Case of A Damc CAS-00230-Y2D7W3	Created On: 9 Origin: Twitter
				T Test

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.

All Cases ∨				▼ Search this view ▶
Hide Empty Lanes & Rows			$\uparrow \downarrow$ Case Title \checkmark \uparrow	${\begin{tabular}{ll} \hline \hline \hline \hline \hline \hline \end{array}}$ Created On ${\begin{tabular}{ll} & {\end{tabular}}$
In Progress	On Hold	Waiting for Details	Researching	Problem Solved
↑ 33 Priority ∨ 📃	↑ 11 Priority ∨ 🖃	↑ 13 Priority ∨ 🖃	↑ 8 Priority ∨ ⊡	↑ 2 Priority ∨ 🖃
High	High 4 ^ 🖃	High 2 ^ +	High 1 ^ 🖃	High
Normal 27 🥆 🖃	Issue with Product Desig CAS-00138-V2L4Y2	Customer needs assistanc CAS-00122-P9T4M5	Need help with Plotters CAS-00144-X4Q7X2	Normal 2 ^ 🕀
C Copy Copy Customer ne CAS-00197-R4C1K2	Customer: S. JAMES FEUERBORN JR Created On: 9/23/2017 12:09 PM		Customer: L. SAMUEL CHOI & SONS Created On: 9/23/2017 12:09 PM	Need help with 3D Printers CAS-00142-K1L9D6
6 d D	Origin: Phone & 🖾 🖪	Issue with 3D Computer-a CAS-00126-J5G3S6	Origin: Twitter	S 🖻 🖪
Copy Customer needs as CAS-00195-F8H5M8	New Customer needs as CAS-00180-X582X9	© ⊡ ⊡	Normal 5 A -	Test CAS-00226-L2W6R9
	Customer: N. GLEN IRWIN & SONS Created On: 10/24/2017 5:08 PM	Normal 2 🦯 📃	C Case of A Damc CAS-00230-Y2DTW3	~ ~ E
Customer needs assistan CAS-00119-S7H9Z7	Origin: Twitter	Issue with Large format p CAS-00135-W7L3R3	Customer: A Damc	Low

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.

Kanban Board – User Manual

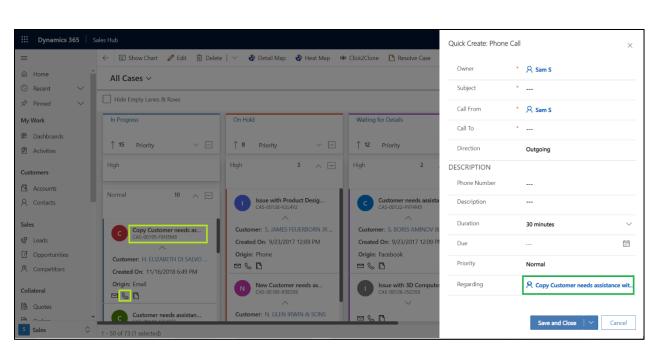
neral Primary Field Controls					
Control	Web	Phone	Tablet		
Read-only Grid (default)	•	0	0		
Kanban Board	۲	۲	۲	×	
dd Control					
Canban Board	statuscode (OptionSet)			//	
	statuscode (UptionSet)			U D	
Lane Filter Criteria *	statuscode (UptionSet) title (SingleLine.Text)				
Lane Filter Criteria Row Filter Crieria				Ø	_
Lane ritter Unieria * Row Filter Crieria Header	title (SingleLine.Text)			0	
Lane Filter Criteria Row Filter Crieria Header Sub-Header	title (SingleLine.Text) prioritycode (OptionSet)			0 0 0	

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.

All Cases ~	
Hide Empty Lanes & Rows	
In Progress	On Hold
↑ 15 Priority ∨ 🖃	↑ 8 Priority ∨ ⊡
High	High 3 <u>~</u>
Normal 10 🦯 🗁	Issue with Product Desig CAS-00138-V2L4Y2
Copy Customer needs as CAS-00195-F8H5M8	Customer: S. JAMES FEUERBORN JR Created On: 9/23/2017 12:09 PM Origin: Phone
Created On: 11/16/2018 6:49 PM Origin: Email	New Customer needs as CAS-00180-X5B2X9

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



Kanban Board – User Manual

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.

ontrol	Web	Phone	Tablet		
Read-only Grid (default)	0	0	0		
anban Board	۲	۲	۲	×	
dd Control					
anban Board					
Default Sorting Direction	Ascending (Enum)			Ø	*
inable Business process flow	N (SingleLine.Text)			Ø	
Activity name(comma separated)	email, phonecall, task (SingleLir	ne.Text)		Ø	
Card Collapsed(Y = collapsed, N = expand(default				O	
Row Collapsed(Y = collapsed, N = expand(default))				0	
				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 Dataverse (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.

	Kanban Board	– User Manual	
All Cases ~			√ Search this
Hide Empty Lanes & Rows		î↓ Cas	re Title ∨ 1
In Progress	On Hold	Waiting for Details	Researching
↑ 33 Priority ∨ 🖃	↑ 1 Assign to Team or User	× ve	↑8 Priority ~ [
High	You have selected 1 item. To who assign it? Assign To User (or team	High 1 🔨 [
Normal 27 A 🖃	User or team	ds assistanc M5	Need help with Plotters CAS-00144-X4Q7X2
C Copy Copy Customer ne CAS-00197-R4C1K2	Cus .	Assign Cancel VINOV & SONS 7 12:09 PM	Customer: L. SAMUEL CHOI & SONS Created On: 9/23/2017 12:09 PM
Customer: H. ELIZABETH DI SALVO Created On: 11/16/2018 7:38 PM	Origin: Phone	Origin: Facebook	Origin: Twitter
Origin: Email	New Customer needs as CAS-00180-X582X9	Issue with 3D Computer-a CAS-00126-J5G3S6	Normal 5 🔨
Copy Customer needs as	Customer: N. GLEN IRWIN & SONS	Customer: I. YISHAI BARKAI & SON	Case of A Dama

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

All Cases ~			\bigtriangledown Search this view $ ho$
Case Mix (By Origin) $ \smallsetminus $	Hide Empty Lanes & Rows	↑↓ Cas	e Title ∨ ↑
◀ ● (blank) ● Email ● Facebook ● Phone ● Tw ►	In Progress	On Hold	Waiting for Details
	↑ 33 Priority ~ —	↑ 11 Priority ✓ 🖃	↑ 13 Priority –
	High	High 4 ^ 🖃	High 2
10 21	Normal 27 🦳	Issue with Product Desig CAS-00138-V2L4Y2	Customer needs assistan CAS-00122-P9T4M5
	Copy Copy Customer ne CAS-00197-R4C1K2	Customer: S. JAMES FEUERBORN JR Created On: 9/23/2017 12:09 PM	Customer: S. BORIS AMINOV & SONS Created On: 9/23/2017 12:09 PM
13 9	Customer: H. ELIZABETH DI SALVO Created On: 11/16/2018 7:38 PM	Origin: Phone	Origin: Facebook
12	Origin: Email	New Customer needs as CAS-00180-X582X9	Issue with 3D Computer CAS-00126-J5G356
	Copy Customer needs as	Customer: N. GLEN IRWIN & SONS	Customer: I. YISHAI BARKAI & SON

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

Being a Dataverse (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.

Kanban Board – User Manual					
All Cases ~			了 Issue with prod	luct design 🗡	
Hide Empty Lanes & Rows		↑↓ Cas	e Title ∽ 1	Created On	
In Progress	On Hold	Waiting for Details	Researching	Problem	
\uparrow 0 Priority \checkmark [-]	↑ 1 Priority ✓ 🖃	↑ 1 Priority ~ 🖃	↑ 0 Priority ~ ⊡	↑ o	
High	High 1 ^ _	High	High	High	
Normal	I Issue with Product Designer CAS-00138-V2L4Y2	Normal 1 ^ 🖃	Normal	Normal	
Low	Customer: S. JAMES FEUERBORN JR Created On: 9/23/2017 12:09 PM	I Issue with Product Designer CAS-00139-Y4D3P1	Low	Low	
Other (Blank)	Origin: Phone	Customer: M. WILLIAM ROSS & SONS Created On: 9/23/2017 12:09 PM	Other (Blank)	Other (Bla	
	Normal	Origin: Web			
	Low	Low			

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.

Dynamics 365 Sales Hub					
=	← 🖾 Show Chart 🕂 New Case 🗎 [Delete 🛛 🗸 🖒 Refresh 🛭 😵 Detail Map			
Collateral 🔺					
🗟 Quotes	All Cases ~				
Orders	Hide Empty Lanes & Rows				
lnvoices	In Progress	On Hold			
Products					
Sales Literature	↑ 15 Priority ∨ 🖃	↑8 Priority ~ ⊡			
Marketing	Priority	High 3 🔨 🗖			
Marketing Lists	Case Title				
ଷ୍ଟ୍ର Quick Campaigns	Case Number	Issue with Product Desig			
🗢 Campaigns	Customer	CAS-00138-V2L4Y2			
Performance	Created On Origin	Customer: S. JAMES FEUERBORN JR Created On: 9/23/2017 12:09 PM			
◎ Goals	^	Origin: Phone			
└── Forecasts	Customer: H. ELIZABETH DI SALVO				
	Created On: 11/16/2018 7:38 PM				
Service	Origin: Email	New Customer needs as CAS-00180-X5B2X9			
🖉 Cases					
🔀 Quote Line Attrib	Copy Customer needs as	Customer: N. GLEN IRWIN & SONS			

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

All Cases ~			∑ Search	this view ${\cal P}$
Hide Empty Lanes & Rows		∱↓ Casi	e Title ∨ ↑	fill Created On $ imes$
In Progress	On Hold	Waiting for Details	Researching	Created On
 ↑ 33 Priority ∨ □ High 	↑ 11 Priority ✓ □ High 4 ∧ □	↑ 13 Priority ✓ □ High 2 ∧ □	↑ 8 Priority ∨ High 1 ∧	Today Yesterday This Week Last Week
Normal 27 🦳 📃	Issue with Product Desig CAS-00138-V2L4Y2	Customer needs assistanc CAS-00122-P9T4MS	Need help with Plotters CAS-00144-X4Q7X2	This Month Last Month
Copy Copy Customer ne CAS-00197-R4C1K2	Customer: S. JAMES FEUERBORN JR Created On: 9/23/2017 12:09 PM Origin: Phone	Customer: S. BORIS AMINOV & SONS Created On: 9/23/2017 12:09 PM Origin: Facebook	Customer: L. SAMUEL CHOI & SC Created On: 9/23/2017 12:09 PM Origin: Twitter	Month To Date This Year Last Year
Customer: H. ELIZABETH DI SALVO Created On: 11/16/2018 7:38 PM				Custom Period >
Origin: Email	New Customer needs as CAS-00180-X5B2X9	Issue with 3D Computer-a CAS-00126-J5G3S6	Normal 5 🦯	✓ Reset Time Frame
Copy Customer needs as	Customer: N. GLEN IRWIN & SONS	Customer: I. YISHAI BARKAI & SON	Const A Down	Test

10. Records can be sorted at global level.

The Kanban Board supports the ability to sort the cards (records) at global level in ascending or descending order of the field selected. You will be allowed to sort the cards based on the fields used in both Kanban view and OOB Grid view.

← 🖾 Show Chart + New 📋 Delete	e │ ∨ ─ () Refresh 🖾 Email a Link │ ∨	🔊 Flow 🗸 🔟 Run Report 🗸 🛍 B	Excel Template:	s \vee 🛛 🚺 Export to Excel	~	:
All Opportunities ~					Actual Close Date his view	
Hide Empty Lanes & Rows	$_{\rm p}\!\!\!/^{\rm g}$ Business Process Flow \smallsetminus	Î	'↓ Topic ∨	Actual Revenue Budget Amount		🛅 Created On $ \smallsetminus $
In Progress Exchange Rate (MIN) - 1.00 V	On Hold Budget Amount (MAX) - \$43,243, ∨	Won Budget Amount (MAX) - \$20,000 🗸	Canceled Budget A	Created On		Out-Sold Budget Amount (
↓ 17 Topic \checkmark 📃	↓ 4 Topic ∨ ⊟	↓ 2 Topic ∨ ⊡	↓ 1	Email Address Est. Close Date	Ð	↓ 1 Topic
Drop Zone	Drop Zone	Drop Zone		Est. Revenue		Dro
Sam Kovic 16 A 🖃 Budget Amount (MAX) - \$4,534,2 🗸	Sam Kovic 4 ~ - Budget Amount (MAX) - \$43,243 ~	Sam Kovic 2 ~ Budget Amount (MAX) - \$20,000	Sam Kovic Budget An	Exchange Rate Owner	Ð	Sam Kovic Budget Amount (M
Potential Customer: Coho Winery	01 Opportunity #101 6/29/2021 12:43 PM	10 orders or Product SK 6/17/2021 323 PM	01	Potential Customer Probability		01 Opportur 6/29/2021
Opportunity #1003	Potential Customer: Coho Winery	Potential Customer: Litware, Inc	Potentia	Purchase Process		Potential Custom
6/29/2021 12:51 PM				Rating Status		
Potential Customer: Coho Winery	O1 Opportunity #1009	10 orders of Product SK 6/17/2021 3:23 PM		Status Reason		L.
1 - 25 of 5000+ (0 selected)				✓ Topic		\leftarrow \leftarrow Page 1 \rightarrow

11. Aggregate value of specific fields can be represented on respective lane and row headers. It also supports pinning the desired aggregate value to a particular lane or row for easy analysis.

The Kanban Board enables calculation of specific aggregate field values of records which can be then displayed on both lane and row headers. You can define up to 3 fields which can be of numeric, decimal or currency datatype for which the aggregate values of the fields such as SUM, MAX, MIN or AVG will be displayed on each lanes and rows. If the lane has 20 records then the total sum of the currency field (Budget amount) of 20 records will be displayed on top of the lane.

Kanban Board		
Aggregate Field 1	estimatedvalue (Currency)	Ø
Aggregate Field 2	budgetamount (Currency)	Ø
Aggregate Field 3	exchangerate (Decimal)	Ø
Aggregate Type - Field 1	SUM (Enum)	Ø
Aggregate Type - Field 2	MAX (Enum)	Ø
Aggregate Type - Field 3	AVG (Enum)	Ø

In addition to this, you can pin the desired aggregate value of the records to a particular lane or row.

Aggregate field values shown on Lane header -

All Opportunities \vee			∇ Search this vie
Hide Empty Lanes & Rows	$_{\rm D}\!\prime^{\rm a}$ Business Process Flow \vee	Î	↓ Topic ∨ ↑
In Progress Exchange Rate (MIN) - 1.00 V	On Hold Budget Amount (MAX) - \$43,243, ∨	Won Budget Amount (MAX) - \$20,000 🗸	Canceled Budget Amount (MAX) - \$0.00 V
->> Budget Amount (MAX) - \$54,353,	↓ 4 Topic ~ —	↓ 2 Topic ~ —	↓ 1 Topic ~ ⊡
X ⁹ Exchange Rate (MIN) - 1.00 ・ ³ Actual Revenue (SUM) - \$0.00	Drop Zone	Drop Zone	Drop Zone
Sam Kovic 16 A - Budget Amount (MAX) - \$4,534,2 Y	Sam Kovic 4 \land \square Budget Amount (MAX) - \$43,243, \checkmark	Sam Kovic 2 \land \square Budget Amount (MAX) - \$20,000 \lor	Sam Kovic 1 \land \square Budget Amount (MAX) - \$0.00 \checkmark
Potential Customer: Coho Winery	Opportunity #101 6/29/2021 12:43 PM	10 orders or Product SK 6/17/2021 3:23 PM	Opportunity #1008 6/29/2021 12:51 PM
Opportunity #1003 6/29/2021 12:51 PM	Potential Customer: Coho Winery	Potential Customer: Litware, Inc	Potential Customer: Coho Winery
Potential Customer: Coho Winery	Opportunity #1009	10 orders of Product SK	

Kanban Board – User Manual Aggregate field values shown on Row header -All Opportunities ~ Search this view Q Hide Empty Lanes & Rows †↓ Topic ∨ 🕇 🛗 Created On 🗸 \sim Business Process Flow \sim In Progress On Hold Won Canceled Out-Sold \sim Exchange Rate (MIN) - 1.00 Budget Amount (MAX) - \$43,243,... 🗸 Budget Amount (MAX) - \$20,000.... \vee Budget Amount (MAX) - \$0.00 $\,$ $\,$ $\,$ **Budget Amount** \downarrow 4 Topic \checkmark -↓ 16 Topic ∨ — ~ E ↓ 2 Topic ✓ — ↓ 2 Topic ↓ 1 Topic Drop Zone Drop Zone Drop Zone Drop Zone Dr Sam Kovic 15 🥆 📃 Sam Kovic 4 🧄 📃 Sam Kovic 2 ~ E Sam Kovic 2 🔨 📃 Sam Kovic Budget Amount (MAX) - \$4,534,2... 🗸 Budget Amount (MAX) - \$43,243,... 🗸 Budget Amount (MAX) - \$20,000.... Budget Amount (MAX) - \$0.00 Budget Amount (M ->= Budget Amount (MAX) - \$20,000.... I O1 Opportunity #101 Opportunity #1006 6/29/2021 12:51 PM Opportunity #1008 6/29/2021 12:51 PM 01 Opportu 6/29/2021 01 Exchange Rate (MIN) - 1.00 6/29/2021 12:43 PM ~ ~ ~ Actual Revenue (SUM) - \$37,058... Potential Customer: Coho Winery Potential Customer: Coho Winery otential cust Potential Customer: Coho Winery Potential Custon ⊠ % ⊡ ⊠ % ⊡ ⊠ % ⊡ ⊠ & ⊡ Opportunity #1004 Opportunity #1007 Opportunity #1009 10 orders of Product SK... 01 01

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