

CONFIGURABLE POWER PLATFORM APP

ForgeXRM Data Grid

Powerful, simple-to-configure grids for Dynamics 365 and Power Apps — turning everyday views and subgrids into action-ready workspaces.

Dynamics 365

Power Apps

Dataverse



Deliver outcomes faster — advanced grids, easy to configure. Group, edit, summarize, and act on business data without leaving the grid, and without custom development.

WHY TEAMS CHOOSE IT

Configure in minutes.

A no-code console defines grid behavior and appearance with point-and-click options — no heavy development.

Work where teams work.

Enhances the views and subgrids inside model-driven apps where records get worked every day.

Bring data together.

Define datasets with Dataverse filter criteria, or surface external systems through connectors — one grid experience.

See patterns, take action.

Multi-level grouping with rollups, subtotals, and totals turns long lists into insight.

Update in place.

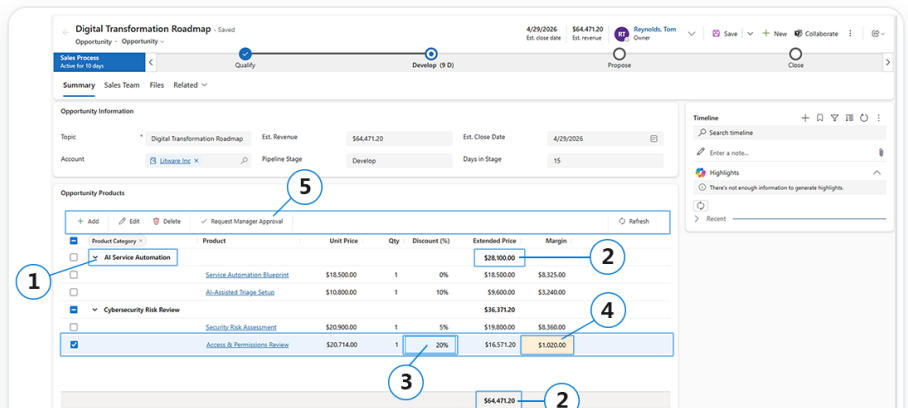
Inline editing and in-grid actions cut clicks, navigation, and export round-trips.

Deploy and extend your way.

Ships as a web resource or a Power Apps Code App, honors Dataverse security roles, and offers an extensible API.

ForgeXRM Data Grid turns Dynamics 365 and Power Apps views into action-ready workspaces. Configure advanced grouping, totals, formatting, and in-grid actions in minutes, so teams can spot patterns and act on business data right where they work.

ForgeXRM adds a complete solution experience around a proven grid engine: no-code configuration, Dataverse-aware behavior, connector support, and an extensible API — a stable, supported foundation your team can build on.



The screenshot shows a 'Digital Transformation Roadmap' grid. It features a table with columns: Product Category, Product, Unit Price, Qty, Discount (%), Extended Price, and Margin. The table is grouped by 'Product Category' with subtotals for 'AI Service Automation' and 'Cybersecurity Risk Review'. A 'Request Manager Approval' button is visible in the toolbar. Annotations 1-5 highlight specific features: 1. Product Grouping, 2. Group Summaries, 3. Cell Editing, 4. Conditional Formatting, and 5. Custom Toolbar Button.

Product Category	Product	Unit Price	Qty	Discount (%)	Extended Price	Margin
AI Service Automation	Service Automation Blueprint	\$18,000.00	1	0%	\$18,000.00	\$8,325.00
	AI-Assisted Storage Setup	\$10,800.00	1	10%	\$9,600.00	\$3,240.00
Cybersecurity Risk Review	Security Risk Assessment	\$20,900.00	1	5%	\$19,800.00	\$8,360.00
	Access & Permissions Review	\$20,714.00	1	20%	\$16,571.20	\$1,020.00
					\$64,471.20	

- Product Grouping** — Group opportunity products by **Product Category** to organize revenue by service area.
- Group Summaries** — Display **Extended Price** subtotals at the category level, with a grand total for overall opportunity revenue.
- Cell Editing** — Allow users to update **Discount %** directly in a column cell, with pricing values recalculated automatically.
- Conditional Formatting** — Highlight line items with below-threshold **Margin \$** values that require manager review.
- Custom Toolbar Button** — Add tailored toolbar actions such as **Request Manager Approval** to support approval workflows.

Use case: opportunity revenue breakdown — a revenue grid configured to group products by category, with live subtotals, in-cell discount editing, and margin alerts.

Capabilities at a glance

Every capability below is configured, not coded — the same grid, shaped to each team's workflow through the configuration console.

● No-Code Configuration Console	Define grid behavior and appearance with point-and-click options. Configuration lives with the grid, so changes roll out without heavy development or redeployment.
● Dataverse + External Connectors	Set the grid's dataset with Dataverse filter criteria, or retrieve data from external systems through connectors — surfacing related information in one grid experience.
● Column-Specific Behavior	Fine-tune every column with properties for visibility, layout, formatting, and pinning, so each view keeps the right fields in focus.
● Advanced Grouping & Totals	Organize records with multi-level grouping, custom group order, and user-friendly group labels — with rollups, subtotals, and grand totals at every level.
● Inline & Cell Editing	Update records directly in the grid, including single-cell edits with dependent values recalculated automatically — no export round-trips.
● Conditional & Field Formatting	Use color, icons, and thresholds to surface at-risk records, exceptions, and negative variances so the next action is obvious at a glance.
● Nested Grids	Expand a row to review related records in place — commission splits under an opportunity, members under a plan — without leaving the working view.
● Custom Toolbar & Row Actions	Add tailored actions such as approval requests or status updates directly to the grid toolbar and row menus to keep workflows moving.
● Extensible Grid API	Support complex scenarios and custom development with an API built for deep integration.
● Flexible Deployment	Deploys as a web resource inside model-driven apps, or as a standalone Power Apps Code App when the grid <i>is</i> the app.
● Security Alignment	Aligns with your Dataverse security model, so users see and act on data strictly according to their permissions.
● Trusted Foundation	AG Grid provides the core grid engine; ForgeXRM adds the maintained solution experience — configuration, Dataverse-aware behavior, connectors, and API.

One grid, many workflows

Illustrative configurations of the same grid — where could it take your workflows?

1 Multi-Level Grouping — Group opportunities by **Division, Region, and Sales Stage** for clearer pipeline visibility.

2 Custom Group Order — Order territories and sales stages to match your sales structure and pipeline flow.

3 Inline Row Editing — Allow users to update opportunity details directly in the grid for faster pipeline maintenance.

4 Footer Summary — Summarize **Estimated Revenue** in the footer to show total pipeline value at a glance.

Sales pipeline management — Use case: a pipeline view configured for multi-level territory grouping and inline editing.

1 Multi-Level Grouping — Group service cases by **Queue and Priority** for clearer triage visibility.

2 Group Summaries — Display case counts in group headers to provide workload visibility across queues and priorities.

3 Field Formatting — Use visual styling in **SLA Status** to make at-risk and overdue cases easy to spot.

4 Row Actions — Provide quick access to next steps such as **Send Status Update** or **Request Information**.

5 Calculated Column — Display **Age (Days)** to help users prioritize older cases that may require attention.

Service case triage — Use case: a case queue configured to group by priority and flag SLA risk automatically.

1 Multi-Level Grouping — Group commission records by **Year and Month**, then by **Opportunity**, for period-based payout review.

2 Nested Grids — Expand an opportunity to review sales team members, roles, split percentages, commission amounts, and payment status.

3 Field Formatting — Use color-coded statuses and highlighted unpaid balances to surface records needing attention.

4 Contextual Toolbar Buttons — Add actions such as **Request Manager Approval** to support commission review and approval workflows.

Commission reconciliation — Use case: a payout grid configured with nested detail and automatic unpaid-balance flags.

1 Multi-Level Grouping — Group projects by **Target Date and Project Owner** for easier portfolio review.

2 Custom Group Labels — Display grouped values with user-friendly labels, such as combining year and month for easier review.

3 Field Formatting — Use icons and color styling in the **Status** field to make project health easy to scan.

4 Conditional Formatting — Highlight negative **Budget Variance** values to quickly surface projects that need attention.

5 Group Summaries — Summarize **Budget, Actual Cost, and Variance** at each group level for instant roll-up visibility.

Project tracking — Use case: a portfolio view configured to roll up budget variance by owner and date.

WHO FORGEXRM DATA GRID IS FOR

Dynamics 365 & Power Apps customers

Elevate views and subgrids with an insight-driven grid experience — configured in minutes.

Implementation partners

A repeatable, configurable grid component that elevates UX and drives consistent outcomes across clients.

ISV partners

Advanced grid experiences inside model-driven apps — with extensibility and a maintained foundation.

See it configured in your environment.

Most teams start with a short conversation to confirm fit — followed by a 30-day trial with grids configured on your data, in your environment.

Talk to ForgeXRM
forgetxrm.com