



# Key Features

#### **Kanban View**

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

#### **Configure Quick Actions**

Cards can be configured to support creating of activity records like phone call, email, appointment etc.

### **BPF Support**

Support to organize and categorize records of a given entity in Kanban view as per the Business Process Flow defined for that entity

### **Drag and Drop Cards**

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

#### **Row Grouping**

Support to categorize and group records in row on the basis of selected field value such as priority – High, Normal, Low.

#### **Compact Card View**

The records in the Kanban View are represented as compact cards. Ability to configure the information displayed in the card





# Key Features

#### Search

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

#### **Context Aware**

Perform any action from the ribbon bar by selecting the cards as you would in the traditional view upon selecting a record.

#### **Sort and Filter lists**

Ability to sort the records and filter them by date created.

### **Global Sorting**

Sort records at global level in ascending and descending order based on the field selected.

### **Aggregate Field Values**

Support to view aggregate field values of records on lane and row headers





# Available For

## SUPPORTED VERSIONS

- MICROSOFT DYNAMICS 365 v9.1 onwards
- Dataverse (Power Apps)

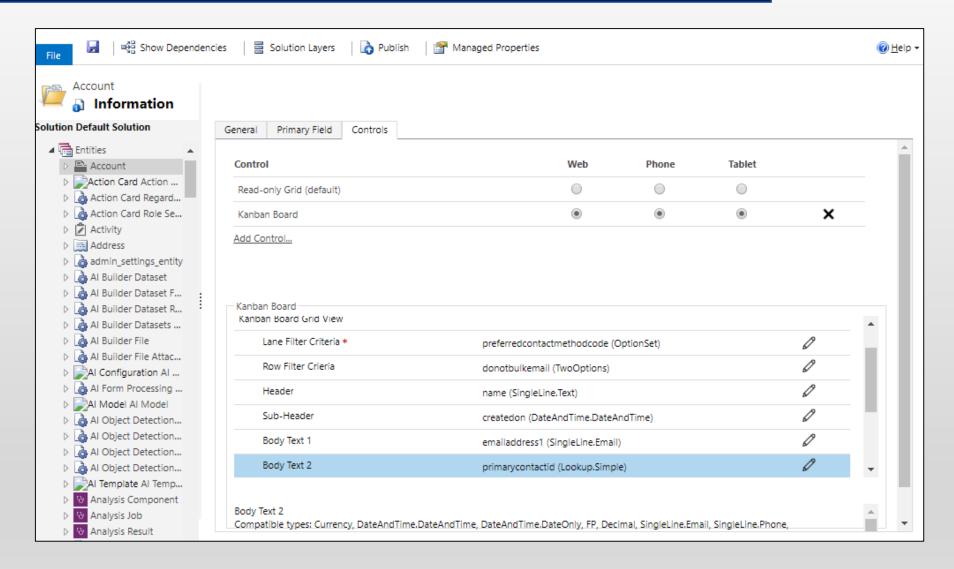
## **DEPLOYMENTS**

• DYNAMICS 365 ONLINE





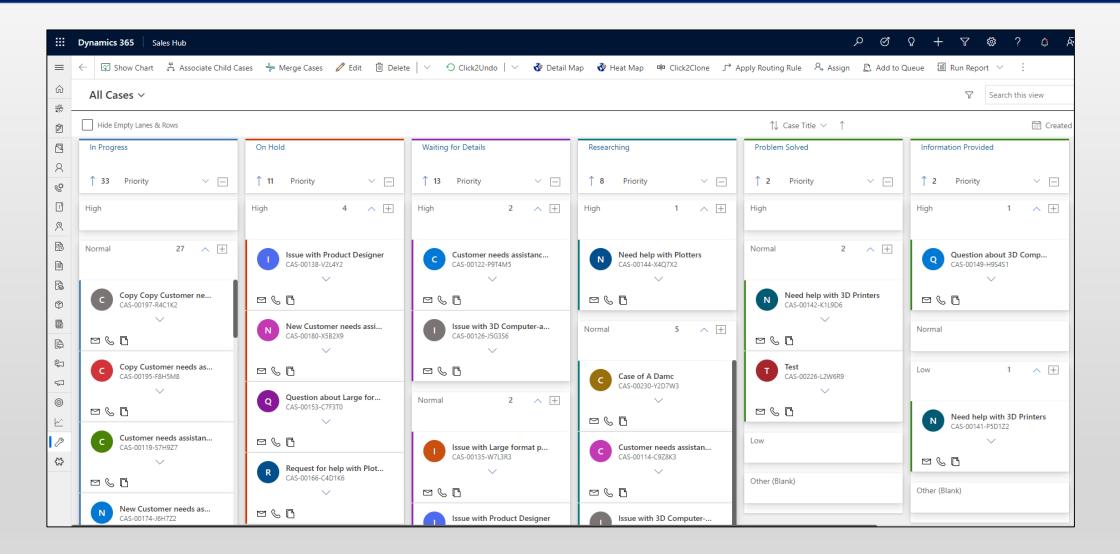
## **PCF Control**







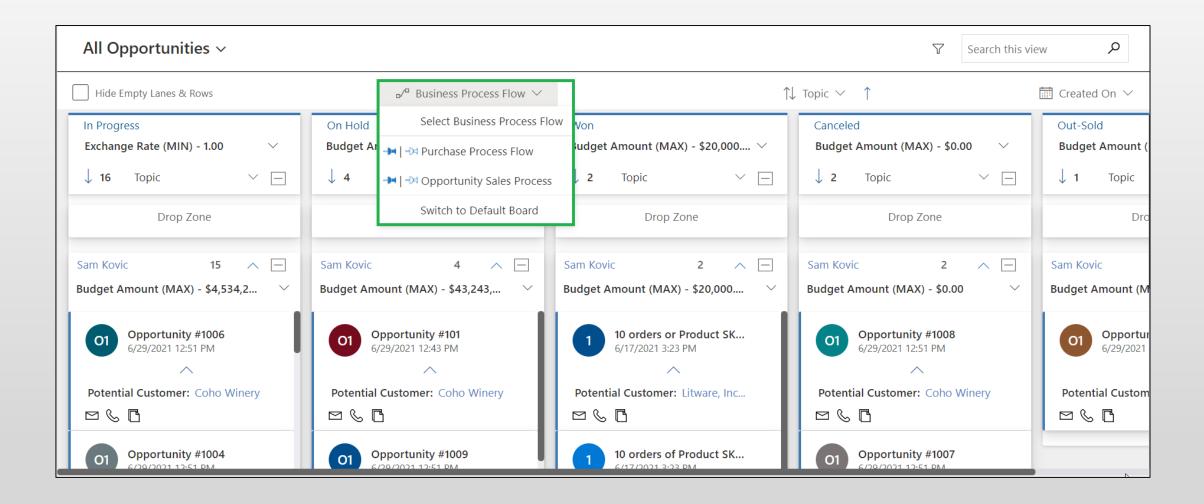
## Kanban View







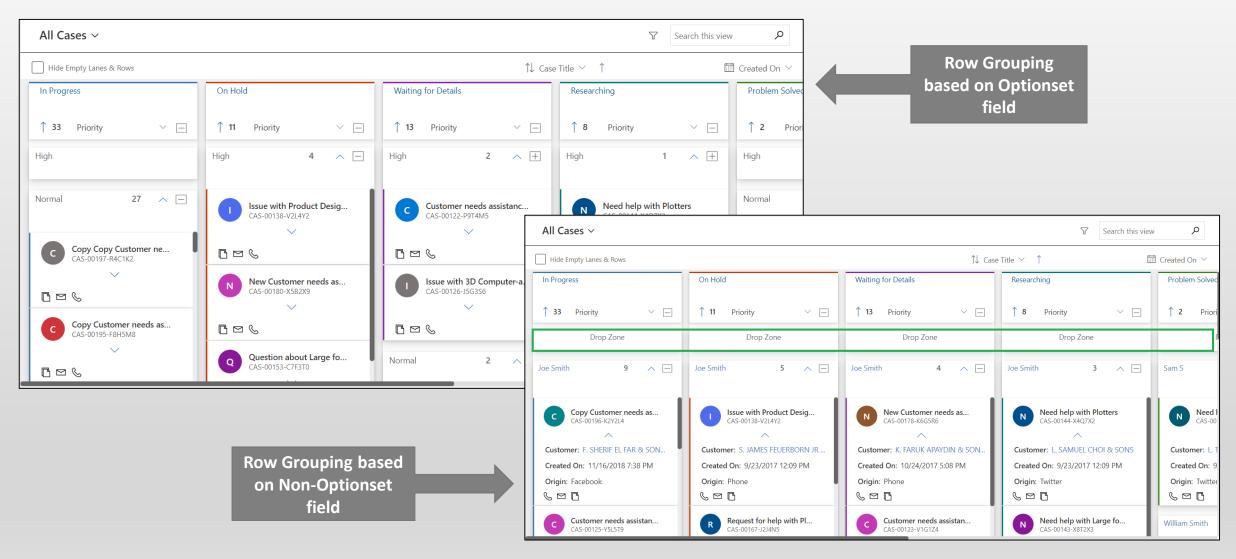
## BPF Support – Pin BPF for Global or Personal use







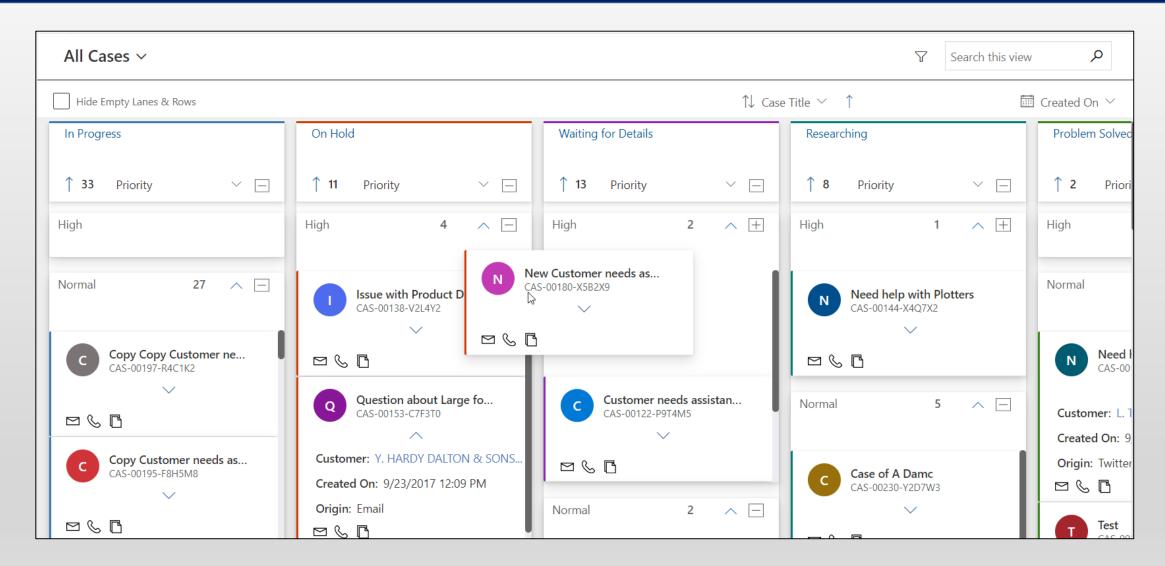
## Row Grouping







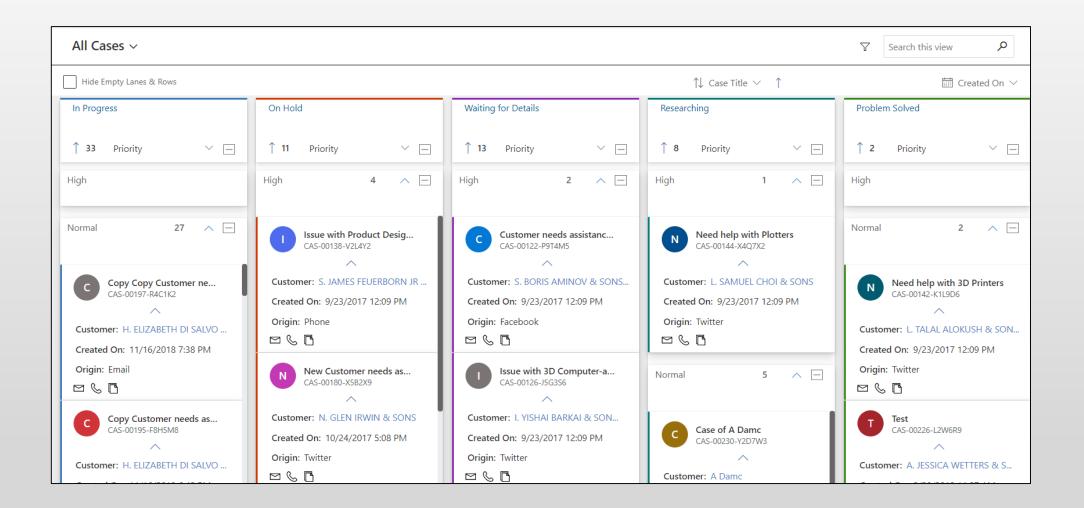
## Drag and Drop Cards







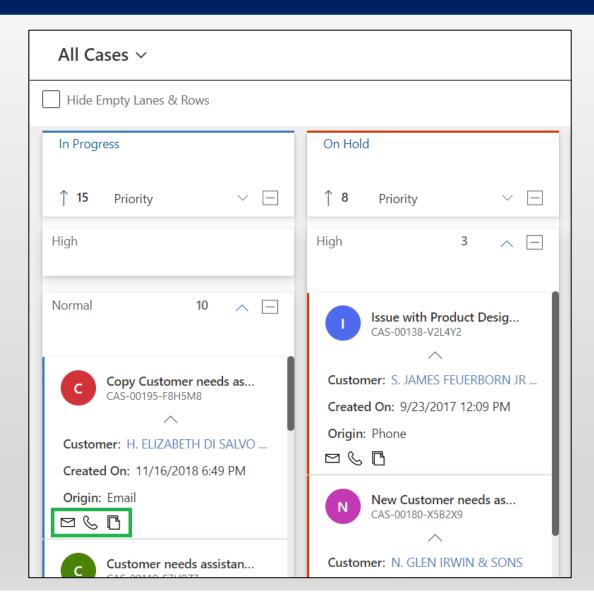
## Compact Card View





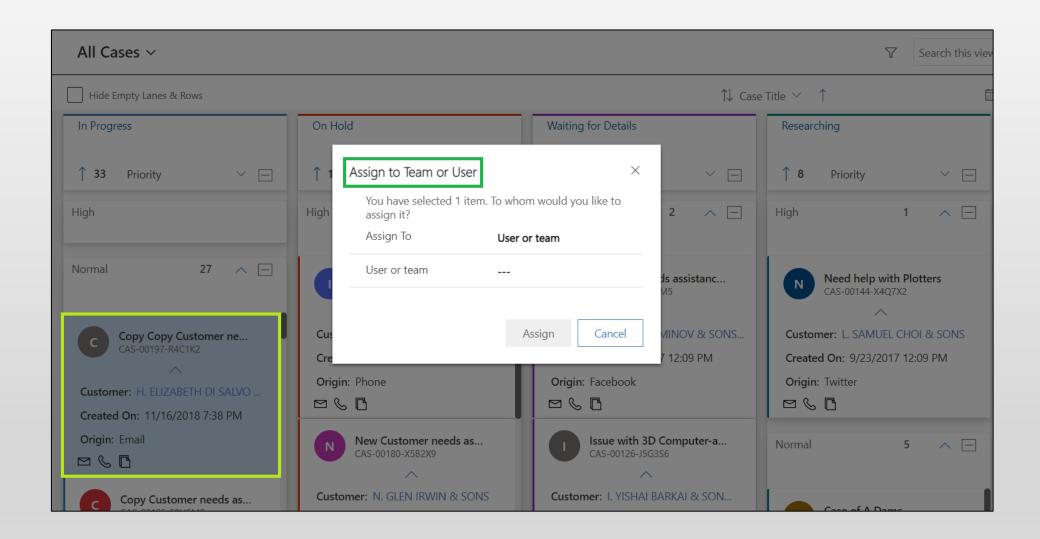


## Contextual actions to create activities





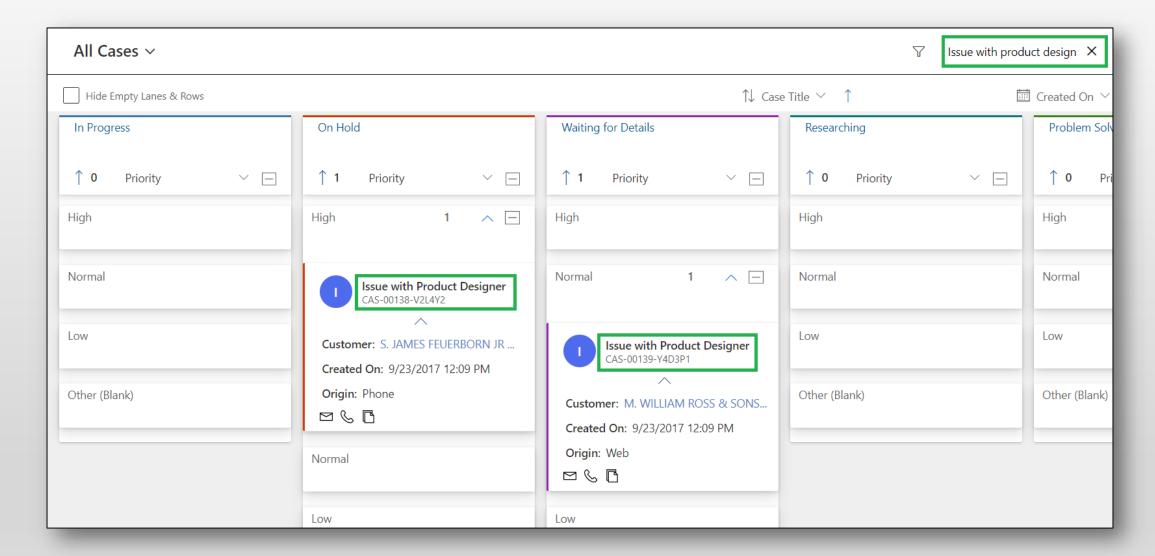
## Context Aware







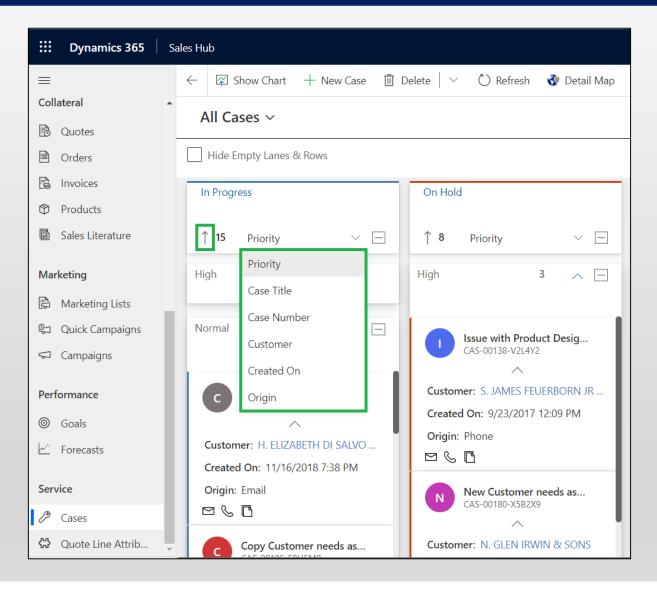
## Search Records







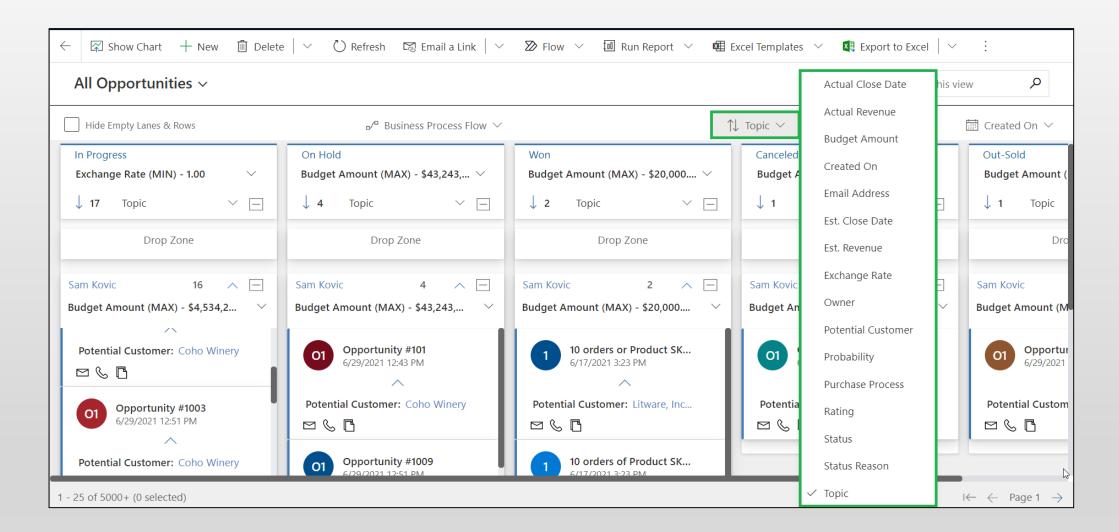
# Sort & Filter Cards (Records)







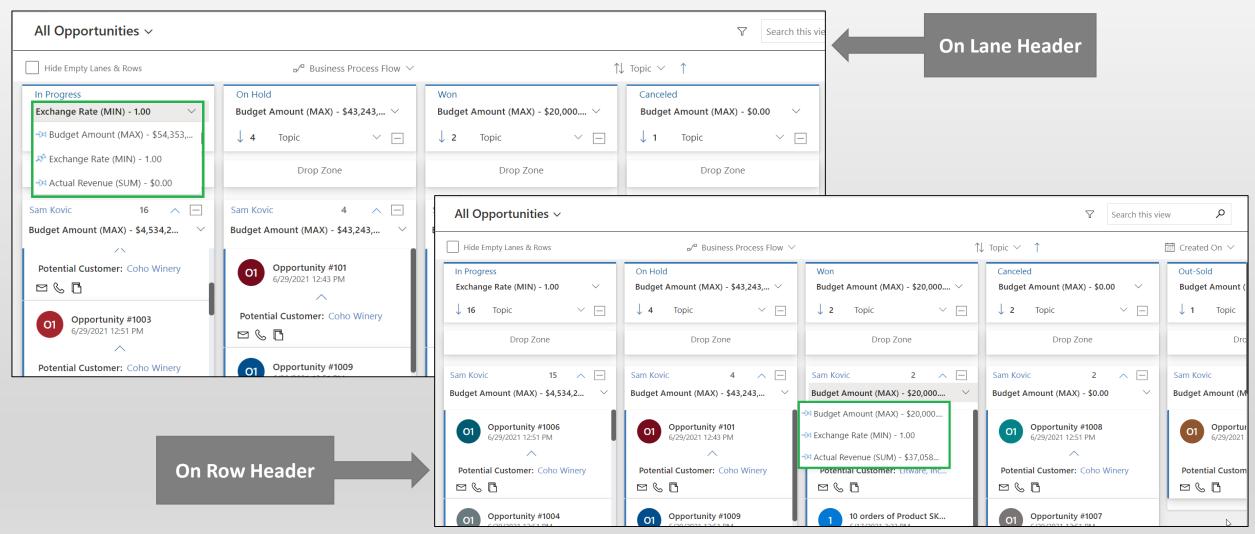
## Global Sorting







# Aggregate Field Values







# Next Steps

Learn more about Kanban
Board today.

Get your free **Kanban Board** trial from Microsoft AppSource or our website!

Email: <a href="mailto:crm@inogic.com">crm@inogic.com</a>

