

Kanban Board

Card-based Kanban view
for Dynamics 365 CRM



Kanban Board

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inogic

Key Features

Kanban View

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

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

Row Grouping

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

Configure Quick Actions

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

Drag and Drop Cards

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

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

The screenshot shows the 'PCF Control' configuration window. The left sidebar displays the 'Solution Default Solution' tree with 'Entities' expanded, showing a list of entities including 'Account', 'Action Card Action ...', 'Action Card Regard...', 'Action Card Role Se...', 'Activity', 'Address', 'admin_settings_entity', 'AI Builder Dataset', 'AI Builder Dataset F...', 'AI Builder Dataset R...', 'AI Builder Datasets ...', 'AI Builder File', 'AI Builder File Attac...', 'AI Configuration AI ...', 'AI Form Processing ...', 'AI Model AI Model', 'AI Object Detection...', 'AI Object Detection...', 'AI Object Detection...', 'AI Object Detection...', 'AI Template AI Temp...', 'Analysis Component', 'Analysis Job', and 'Analysis Result'.

The main area has three tabs: 'General', 'Primary Field', and 'Controls'. The 'Controls' tab is active, showing a table of controls for different devices.

Control	Web	Phone	Tablet
Read-only Grid (default)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Kanban Board	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>

Below the table is a link: [Add Control...](#)

The 'Kanban Board' section is expanded, showing the 'Kanban Board Grid View' configuration. It lists various controls and their data sources:

Control	Data Source
Lane Filter Criteria *	preferredcontactmethodcode (OptionSet)
Row Filter Criteria	donotbulkemail (TwoOptions)
Header	name (SingleLine.Text)
Sub-Header	createdon (DateAndTime.DateAndTime)
Body Text 1	emailaddress1 (SingleLine.Email)
Body Text 2	primarycontactid (Lookup.Simple)

At the bottom, it lists compatible types: Currency, DateAndTime.DateAndTime, DateAndTime.DateOnly, FP, Decimal, SingleLine.Email, SingleLine.Phone.



Kanban View

Dynamics 365 | Sales Hub

☰ ☑ Show Chart ☒ Associate Child Cases ☄ Merge Cases ✎ Edit 🗑 Delete ⌵ 🔍 Click2Undo ⌵ 📊 Detail Map 🔥 Heat Map 🔄 Click2Clone ➡ Apply Routing Rule 👤 Assign ➕ Add to Queue 📅 Run Report ⌵ ⋮

All Cases ▾ Search this view 🔍

☐ Hide Empty Lanes & Rows Case Title ▾ ↑ Created

In Progress	On Hold	Waiting for Details	Researching	Problem Solved	Information Provided
↑ 33 Priority ▾ □ High Normal 27 ^ +	↑ 11 Priority ▾ □ High 4 ^ +	↑ 13 Priority ▾ □ High 2 ^ +	↑ 8 Priority ▾ □ High 1 ^ +	↑ 2 Priority ▾ □ High Normal 2 ^ +	↑ 2 Priority ▾ □ High 1 ^ +
🔴 Copy Copy Customer ne... CAS-00197-R4C1K2 ✉ ☎ 📎	🔵 Issue with Product Designer CAS-00138-V2L4Y2 ✉ ☎ 📎	🔵 Customer needs assistanc... CAS-00122-P9T4M5 ✉ ☎ 📎	🔵 Need help with Plotters CAS-00144-X4Q7X2 ✉ ☎ 📎	🔵 Need help with 3D Printers CAS-00142-K1L9D6 ✉ ☎ 📎	🔵 Question about 3D Comp... CAS-00149-H9S4S1 ✉ ☎ 📎
🔴 Copy Customer needs as... CAS-00195-F8H5M8 ✉ ☎ 📎	🟢 New Customer needs assi... CAS-00180-X5B2X9 ✉ ☎ 📎	🔴 Issue with 3D Computer-a... CAS-00126-J5G3S6 ✉ ☎ 📎	Normal 5 ^ +	🔴 Test CAS-00226-L2W6R9 ✉ ☎ 📎	Normal
🟢 Customer needs assistan... CAS-00119-S7H9Z7 ✉ ☎ 📎	🔵 Question about Large for... CAS-00153-C7F3T0 ✉ ☎ 📎	Normal 2 ^ +	🔴 Case of A Damc CAS-00230-Y2D7W3 ✉ ☎ 📎	Low	Low 1 ^ +
🔵 New Customer needs as... CAS-00174-J6H7Z2 ✉ ☎ 📎	🔵 Request for help with Plot... CAS-00166-C4D1K6 ✉ ☎ 📎	🔴 Issue with Large format p... CAS-00135-W7L3R3 ✉ ☎ 📎	🔵 Customer needs assistan... CAS-00114-C9Z8K3 ✉ ☎ 📎	Other (Blank)	🔵 Need help with 3D Printers CAS-00141-P5D1Z2 ✉ ☎ 📎
		🔵 Issue with Product Designer	🔴 Issue with 3D Computer...		Other (Blank)

BPF Support – Pin BPF for Global or Personal use

The screenshot displays the 'All Opportunities' view in the Inogic CRM. The board is organized into five lanes: 'In Progress', 'On Hold', 'Won', 'Canceled', and 'Out-Sold'. Each lane has a header with a status, a filter (e.g., 'Exchange Rate (MIN) - 1.00'), a count of items, and a 'Topic' dropdown. Below the headers are 'Drop Zone' areas and a list of opportunities. A context menu is open over the 'On Hold' lane, showing options: 'Business Process Flow', 'Select Business Process Flow', 'Purchase Process Flow', 'Opportunity Sales Process', and 'Switch to Default Board'. The menu is highlighted with a green border. The opportunities listed include details like 'Opportunity #1006', 'Opportunity #101', 'Opportunity #1008', and 'Opportunity #1007', along with their creation dates and times. The 'Potential Customer' for each opportunity is also displayed.

Row Grouping

All Cases ▾

Search this view 🔍

☐ Hide Empty Lanes & Rows

Case Title ▾ ↑

Created On ▾

In Progress

↑ 33 Priority ▾

High

Normal 27 ▾

Copy Copy Customer ne...
CAS-00197-R4C1K2

Copy Customer needs as...
CAS-00195-F8H5M8

On Hold

↑ 11 Priority ▾

High 4 ▾

Issue with Product Desig...
CAS-00138-V2L4Y2

New Customer needs as...
CAS-00180-X5B2X9

Question about Large fo...
CAS-00153-C7F3T0

Waiting for Details

↑ 13 Priority ▾

High 2 ▾

Customer needs assistanc...
CAS-00122-P9T4M5

Issue with 3D Computer-a...
CAS-00126-J5G3S6

Normal 2 ▾

Researching

↑ 8 Priority ▾

High 1 ▾

Need help with Plotters
CAS-00144-X4Q7X2

Problem Solved

↑ 2 Priority ▾

High

Normal

Row Grouping based on Optionset field

All Cases ▾

Search this view 🔍

☐ Hide Empty Lanes & Rows

Case Title ▾ ↑

Created On ▾

In Progress

↑ 33 Priority ▾

Drop Zone

Joe Smith 9 ▾

Copy Customer needs as...
CAS-00196-K2Y2L4

Customer: F. SHERIF EL FAR & SON...
Created On: 11/16/2018 7:38 PM
Origin: Facebook

Customer needs assistanc...
CAS-00125-Y5L5T9

On Hold

↑ 11 Priority ▾

Drop Zone

Joe Smith 5 ▾

Issue with Product Desig...
CAS-00138-V2L4Y2

Customer: S. JAMES FEUERBORN JR ...
Created On: 9/23/2017 12:09 PM
Origin: Phone

Request for help with PL...
CAS-00167-J2J4N5

Waiting for Details

↑ 13 Priority ▾

Drop Zone

Joe Smith 4 ▾

New Customer needs as...
CAS-00178-K6G5R6

Customer: K. FARUK APAYDIN & SON...
Created On: 10/24/2017 5:08 PM
Origin: Phone

Customer needs assistanc...
CAS-00123-V1G1Z4

Researching

↑ 8 Priority ▾

Drop Zone

Joe Smith 3 ▾

Need help with Plotters
CAS-00144-X4Q7X2

Customer: L. SAMUEL CHOI & SONS
Created On: 9/23/2017 12:09 PM
Origin: Twitter

Need help with Large fo...
CAS-00143-X8T2X3

Problem Solved

↑ 2 Priority ▾

Drop Zone

Sam S

Need I
CAS-001

Customer: L. T
Created On: 9
Origin: Twitter

William Smith

Row Grouping based on Non-Optionset field

Drag and Drop Cards

All Cases ▾

↑ 33

Priority ▾

High

Normal 27

C

Copy Copy Customer ne...

CAS-00197-R4C1K2

✉ ☎ 📎

C

Copy Customer needs as...

CAS-00195-F8H5M8

✉ ☎ 📎

↑ 11

Priority ▾

High 4

I

Issue with Product D

CAS-00138-V2L4Y2

✉ ☎ 📎

Q

Question about Large fo...

CAS-00153-C7F3T0

Customer: Y. HARDY DALTON & SONS...

Created On: 9/23/2017 12:09 PM

Origin: Email

✉ ☎ 📎

↑ 13

Priority ▾

High 2

C

Customer needs assistan...

CAS-00122-P9T4M5

✉ ☎ 📎

Normal 2

↑ 8

Priority ▾

High 1

N

Need help with Plotters

CAS-00144-X4Q7X2

✉ ☎ 📎

Normal 5

C

Case of A Damc

CAS-00230-Y2D7W3

✉ ☎ 📎

↑ 2

Priority ▾

High

N

Need I

CAS-00...

Customer: L. T

Created On: 9,

Origin: Twitter

✉ ☎ 📎

T

Test

CAS-00...

✉ ☎ 📎

Case Title ▾

↑

Created On ▾

Hide Empty Lanes & Rows

Search this view 🔍

Kanban Board

crm@inogic.com

inogic

Compact Card View

All Cases ▾ Search this view 🔍

☐ Hide Empty Lanes & Rows Case Title ▾ ↑ Created On ▾

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				Normal 2
<div><div>C</div><div>Copy Copy Customer ne... CAS-00197-R4C1K2</div><div>Customer: H. ELIZABETH DI SALVO ...</div><div>Created On: 11/16/2018 7:38 PM</div><div>Origin: Email</div><div>✉ 📞 📄</div></div>	<div><div>I</div><div>Issue with Product Desig... CAS-00138-V2L4Y2</div><div>Customer: S. JAMES FEUERBORN JR ...</div><div>Created On: 9/23/2017 12:09 PM</div><div>Origin: Phone</div><div>✉ 📞 📄</div></div> <div><div>N</div><div>New Customer needs as... CAS-00180-X5B2X9</div><div>Customer: N. GLEN IRWIN & SONS</div><div>Created On: 10/24/2017 5:08 PM</div><div>Origin: Twitter</div><div>✉ 📞 📄</div></div>	<div><div>C</div><div>Customer needs assistanc... CAS-00122-P9T4M5</div><div>Customer: S. BORIS AMINOV & SONS...</div><div>Created On: 9/23/2017 12:09 PM</div><div>Origin: Facebook</div><div>✉ 📞 📄</div></div> <div><div>I</div><div>Issue with 3D Computer-a... CAS-00126-J5G3S6</div><div>Customer: I. YISHAI BARKAI & SON...</div><div>Created On: 9/23/2017 12:09 PM</div><div>Origin: Twitter</div><div>✉ 📞 📄</div></div>	<div><div>N</div><div>Need help with Plotters CAS-00144-X4Q7X2</div><div>Customer: L. SAMUEL CHOI & SONS</div><div>Created On: 9/23/2017 12:09 PM</div><div>Origin: Twitter</div><div>✉ 📞 📄</div></div> <div><div>C</div><div>Case of A Damc CAS-00230-Y2D7W3</div><div>Customer: A Damc</div></div>	<div><div>N</div><div>Need help with 3D Printers CAS-00142-K1L9D6</div><div>Customer: L. TALAL ALOKUSH & SON...</div><div>Created On: 9/23/2017 12:09 PM</div><div>Origin: Twitter</div><div>✉ 📞 📄</div></div> <div><div>T</div><div>Test CAS-00226-L2W6R9</div><div>Customer: A. JESSICA WETTERS & S...</div></div>

Contextual actions to create activities

All Cases ▾

☐ Hide Empty Lanes & Rows

In Progress

↑ 15 Priority ▾ □

High

Normal 10 ^ □

C




Copy Customer needs as...
CAS-00195-F8H5M8

^

Customer: H. ELIZABETH DI SALVO ...

Created On: 11/16/2018 6:49 PM

Origin: Email

C

Customer needs assistan...
CAS-00110-67H077

On Hold

↑ 8 Priority ▾ □

High 3 ^ □

I




Issue with Product Desig...
CAS-00138-V2L4Y2

^

Customer: S. JAMES FEUERBORN JR ...

Created On: 9/23/2017 12:09 PM

Origin: Phone

N

New Customer needs as...
CAS-00180-X5B2X9

^

Customer: N. GLEN IRWIN & SONS



Context Aware

The screenshot shows a Kanban board titled "All Cases" with columns for "In Progress", "On Hold", "Waiting for Details", and "Researching". A modal dialog titled "Assign to Team or User" is open in the center. The dialog contains the text "You have selected 1 item. To whom would you like to assign it?" and a table for assignment. The table has two columns: "Assign To" and "User or team". The "Assign To" column has a dropdown menu showing "User or team". The "User or team" column has a dropdown menu showing "---". The dialog also has "Assign" and "Cancel" buttons. In the background, a card in the "In Progress" column is highlighted with a yellow border. The card is titled "Copy Copy Customer ne..." and contains details: "Customer: H. ELIZABETH DI SALVO ...", "Created On: 11/16/2018 7:38 PM", and "Origin: Email".

Assign to Team or User

You have selected 1 item. To whom would you like to assign it?

Assign To	User or team
User or team	---

Assign Cancel

Copy Copy Customer ne...
CAS-00197-R4C1K2

Customer: H. ELIZABETH DI SALVO ...

Created On: 11/16/2018 7:38 PM

Origin: Email



Search Records

All Cases ▾ Issue with product design ✕

☐ Hide Empty Lanes & Rows ↕ Case Title ▾ ↑ 📅 Created On ▾

In Progress	On Hold	Waiting for Details	Researching	Problem Solving
↑ 0 Priority ▾ □	↑ 1 Priority ▾ □	↑ 1 Priority ▾ □	↑ 0 Priority ▾ □	↑ 0 Priority ▾ □
High	High 1 ^ □	High	High	High
Normal	<div><div>Issue with Product Designer CAS-00138-V2L4Y2</div><div>Customer: S. JAMES FEUERBORN JR ... Created On: 9/23/2017 12:09 PM Origin: Phone ✉ ☎ 📎</div></div>	Normal 1 ^ □	Normal	Normal
Low		<div><div>Issue with Product Designer CAS-00139-Y4D3P1</div><div>Customer: M. WILLIAM ROSS & SONS... Created On: 9/23/2017 12:09 PM Origin: Web ✉ ☎ 📎</div></div>	Low	Low
Other (Blank)			Other (Blank)	Other (Blank)

Sort & Filter Cards (Records)

Dynamics 365 | Sales Hub

← Show Chart + New Case Delete Refresh Detail Map

All Cases ▾

☐ Hide Empty Lanes & Rows

In Progress

↑ 15 Priority ▾ □

High

Normal

Priority

Case Title

Case Number

Customer

Created On

Origin

On Hold

↑ 8 Priority ▾ □

High 3 ▴ □

Issue with Product Desig...
CAS-00138-V2L4Y2

Customer: S. JAMES FEUERBORN JR ...

Created On: 9/23/2017 12:09 PM

Origin: Phone

New Customer needs as...
CAS-00180-X5B2X9

Customer: N. GLEN IRWIN & SONS

Cases

Quote Line Attrib...

Global Sorting

The screenshot displays a Kanban Board titled "All Opportunities" with a top navigation bar containing icons for Show Chart, New, Delete, Refresh, Email a Link, Flow, Run Report, Excel Templates, and Export to Excel. The board is organized into five lanes: "In Progress", "On Hold", "Won", "Canceled", and "Out-Sold". Each lane has a "Drop Zone" and a "Topic" dropdown menu. A green box highlights the "Topic" dropdown in the "On Hold" lane, which is open, showing a list of sorting options. The options include: Actual Close Date, Actual Revenue, Budget Amount, Created On, Email Address, Est. Close Date, Est. Revenue, Exchange Rate, Owner, Potential Customer, Probability, Purchase Process, Rating, Status, Status Reason, and Topic (which is checked). The board also features a "Hide Empty Lanes & Rows" checkbox and a "Business Process Flow" dropdown. The bottom status bar indicates "1 - 25 of 5000+ (0 selected)" and "Page 1".

Global Sorting Options:

- Actual Close Date
- Actual Revenue
- Budget Amount
- Created On
- Email Address
- Est. Close Date
- Est. Revenue
- Exchange Rate
- Owner
- Potential Customer
- Probability
- Purchase Process
- Rating
- Status
- Status Reason
- Topic (checked)

Aggregate Field Values

The image displays two screenshots of the Inogic CRM Kanban Board, illustrating how aggregate field values are presented in lane and row headers.

Top Screenshot (Lane Header): This view shows four lanes: "In Progress", "On Hold", "Won", and "Canceled". The "In Progress" lane header is highlighted with a green box, showing aggregate values: "Exchange Rate (MIN) - 1.00", "Budget Amount (MAX) - \$54,353,..." (truncated), "Exchange Rate (MIN) - 1.00", and "Actual Revenue (SUM) - \$0.00". A grey arrow labeled "On Lane Header" points to this section.

Bottom Screenshot (Row Header): This view shows the same four lanes, but with a fifth lane, "Out-Sold", added. The "In Progress" lane header is again highlighted with a green box, showing aggregate values: "Exchange Rate (MIN) - 1.00", "Budget Amount (MAX) - \$20,000,..." (truncated), "Exchange Rate (MIN) - 1.00", and "Actual Revenue (SUM) - \$37,058,..." (truncated). A grey arrow labeled "On Row Header" points to this section.

Both screenshots show individual opportunity cards within the lanes, including details like "Opportunity #1003", "Opportunity #1001", "Opportunity #1006", "Opportunity #1001", "Opportunity #1008", and "Opportunity #1007", along with their potential customers and dates.



Next Steps

Learn more about [Kanban Board](#) today.

Get your free **Kanban Board** trial from [Microsoft AppSource](#) or [our website](#)!

Email: crm@inogic.com

