CRM 365 Solutions

D365 Quick Reference Guide
Opportunity Kanban View

This QRG shows you how to add a Kanban View of Opportunities to your Dynamics 365 Sales environment. Kanban takes its name from the Japanese for "visual signal or card" and was originally developed for the automotive industry using just in time scheduling.

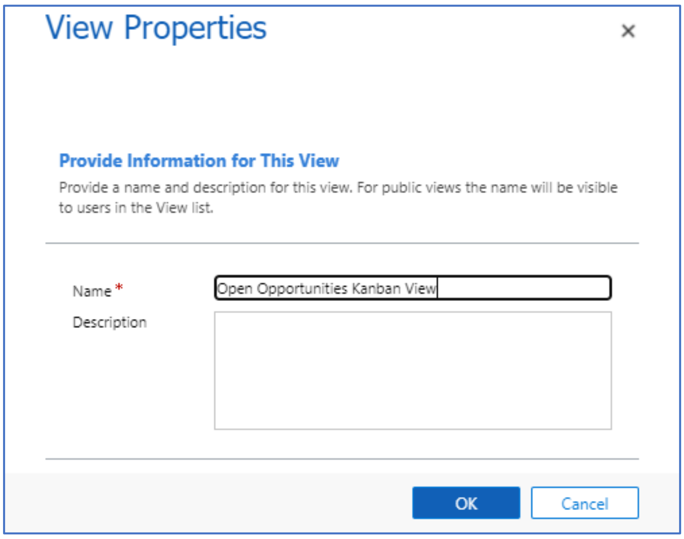
Using Kanban views for Opportunities gives a visual indication of what stage each opportunity is at and allows drag-and-drop interaction to update Opportunities.

Kanban views can also be created for Activities.

This can be carried out by a System Administrator for a system view, or any user with the relevant security role to create a personal view.

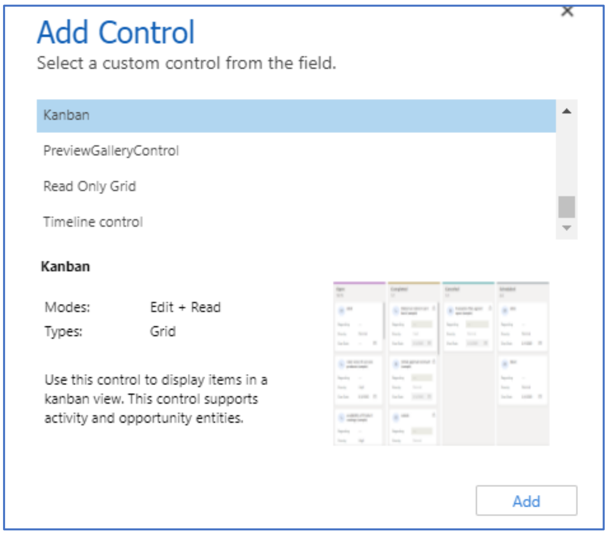
These instructions are for a user creating a personal view, but a virtually identical when customising a system view.

1. Open the View required – for example Open Opportunities
2. Click on Advanced Find on the shortcut menu
3. Use Save As to create a copy of the View – e.g. Open Opportunities Kanban View



4. Click on Edit Columns
5. Click on Custom Controls

6. Scroll down and select **Kanban** and [Add]



7. Select where to show – web / phone / tablet
8. Click [OK] then [Save and close]

One key difference if you are setting up System Views is that the customisations need to be published, and if using Model driven apps, the View must be added to the Site map and that also published.

The new view can then be selected in the same way as any other view. On the right there are two options where you can select to view by Business Process Flow (stages) or by Status.