

# Inforce Kanban view for Creatio user guide

## Recommendations

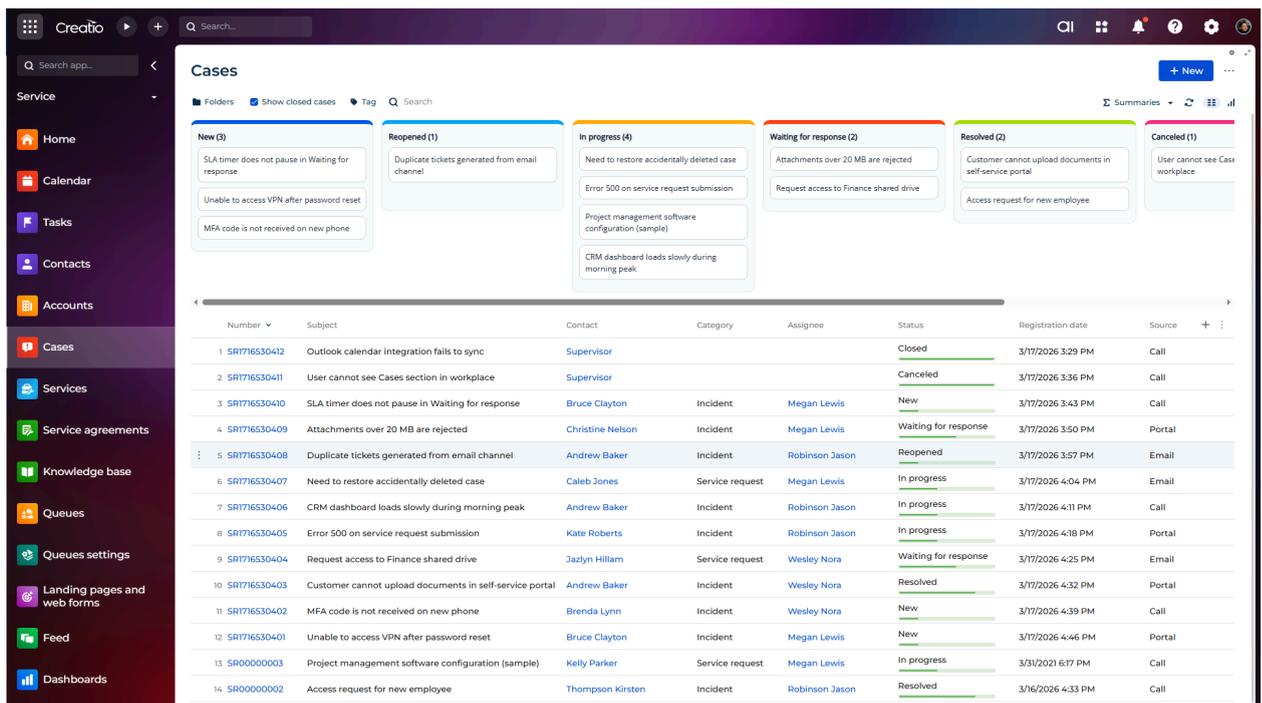
Before starting work with the product, it is recommended to:

- Re-login.
- Ensure Kanban is enabled on the target section list page.
- Ensure the user has permissions to edit section records.
- Refresh the browser page after configuration publish.

On the section list page, Kanban board is available in the content area.

Kanban actions work with:

- Single card drag-and-drop between columns.
- Record opening by double click.
- Folder, tag, search, and predefined filters combined.
- All records returned by current filter conditions.



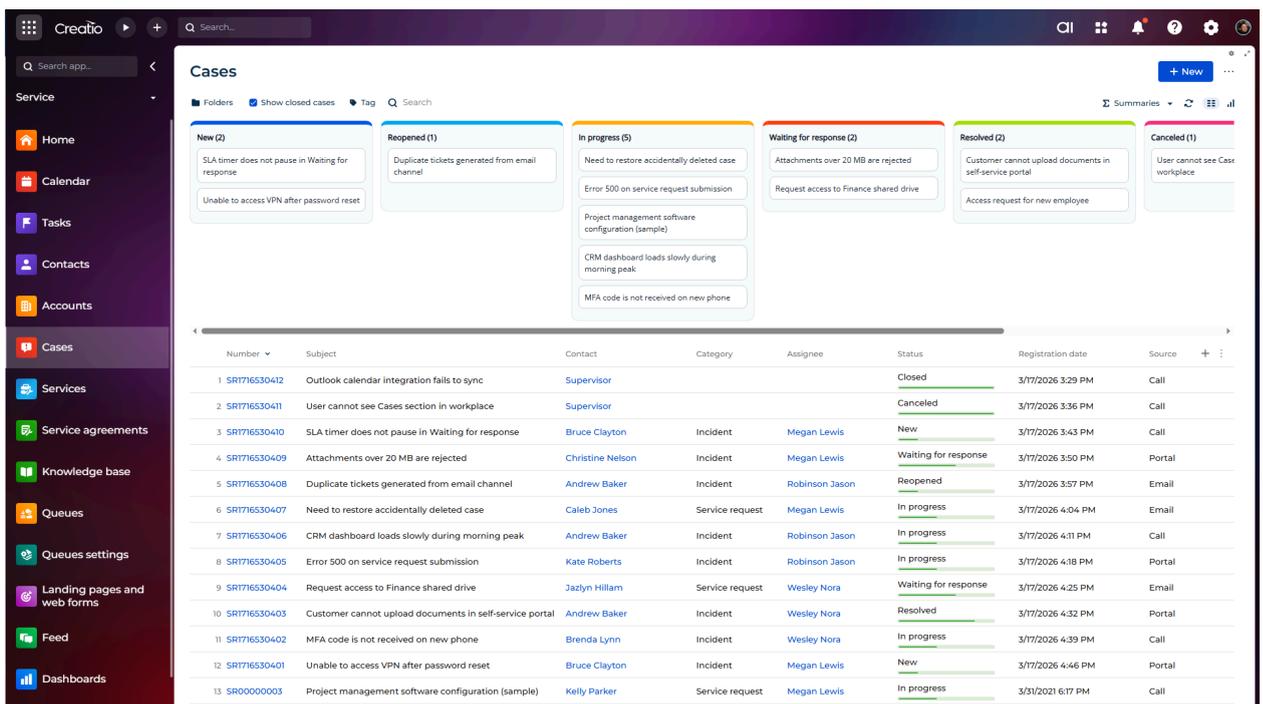
Screenshot 1. Kanban board overview

Example 1:

We moved one case card from the "New" column to the "In progress" column by drag and drop.

Result:

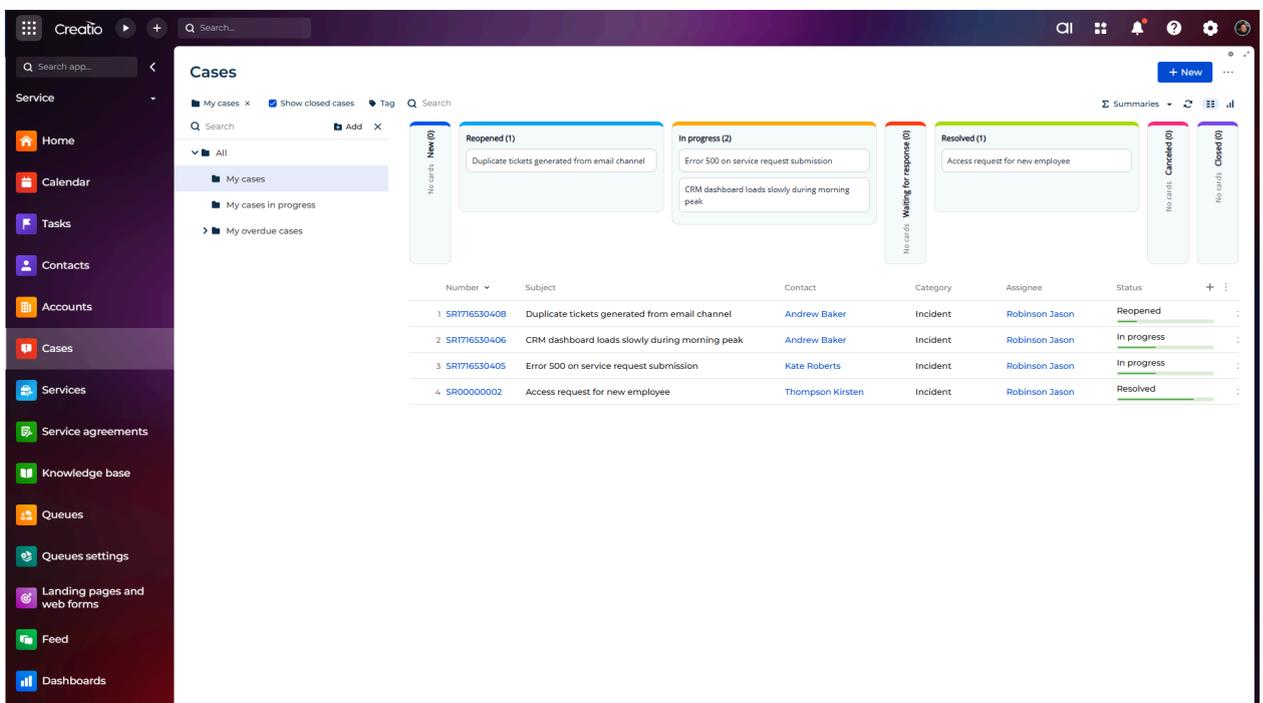
Only this card had its status updated.



Screenshot 2. One card after moving

### Example 2:

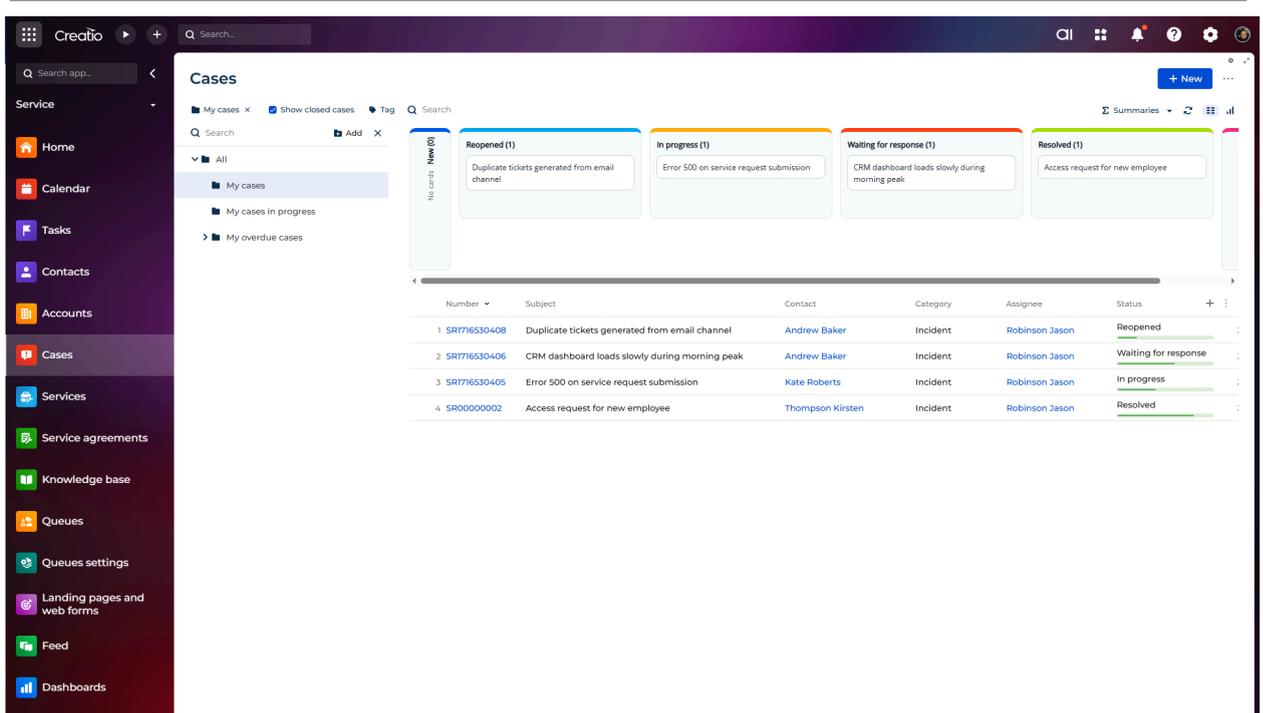
We applied a folder filter to show records of one assignee and then moved one visible card to the next status.



Screenshot 3. Filtered records

### Result:

Only filtered records were displayed, and the moved card changed status.



The screenshot displays the 'Cases' dashboard in the Inforce CRM. The interface includes a sidebar with navigation options like Home, Calendar, Tasks, Contacts, Accounts, Cases, Services, Service agreements, Knowledge base, Queues, Queues settings, Landing pages and web forms, Feed, and Dashboards. The main area shows a Kanban board with four columns: Reopened (1), In progress (1), Waiting for response (1), and Resolved (1). Below the board is a table of filtered records.

Number	Subject	Contact	Category	Assignee	Status
1	SR1716530408 Duplicate tickets generated from email channel	Andrew Baker	Incident	Robinson Jason	Reopened
2	SR1716530406 CRM dashboard loads slowly during morning peak	Andrew Baker	Incident	Robinson Jason	Waiting for response
3	SR1716530405 Error 500 on service request submission	Kate Roberts	Incident	Robinson Jason	In progress
4	SR00000002 Access request for new employee	Thompson Kirsten	Incident	Robinson Jason	Resolved

Screenshot 5. Filtered records after update