



interprise suite™

## Kanban

In CRM there is now the option in the Case, Opportunities & Calendar to view these in Kanban style.

### Case Dashboard by Kanban.

Below the Case dashboard has been changed to group in Kanban by Assigned To

Team	Assigned To	Status	Entity	Contact	Subject	Start Date	Due Date	Priority	SA
Support	Admin User	Not Started	DC Toys Ltd	Mr Bill Cooper	Issue with Network	10/08/2022 14:36	10/08/2022 14:36	Medium	Not Started
Support	Karl	Not Started	Rainy Days Toys	Mr Colin Adams	Test	24/06/2022 15:55	24/06/2022 15:55	Medium	Not Started
Support	Admin User	Not Started	DC Toys Ltd	Mr Bill Cooper	new network	24/06/2022 15:54	24/06/2022 15:54	Medium	Not Started
Support	Admin User	Not Started	A US Customer Inc	Mr US Contact	Network Is Slow	23/01/2007 09:58	24/01/2007 09:59	Medium	Not Started

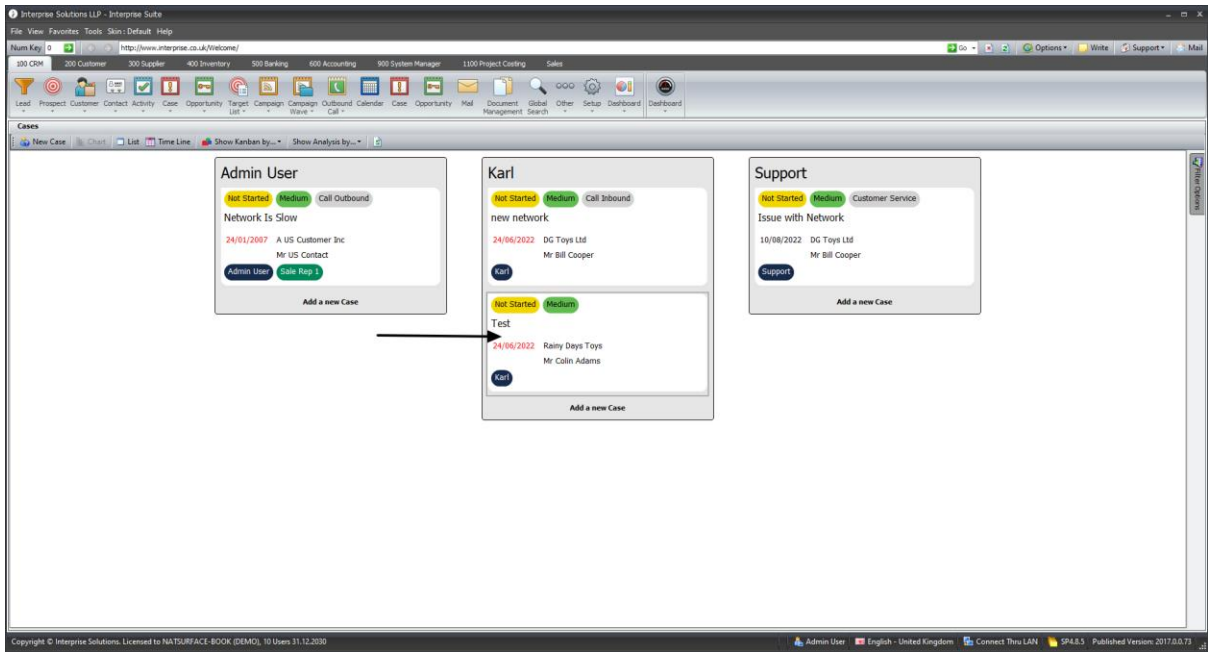
### Kanban By Assigned To

The case can be drag & dropped onto another user.

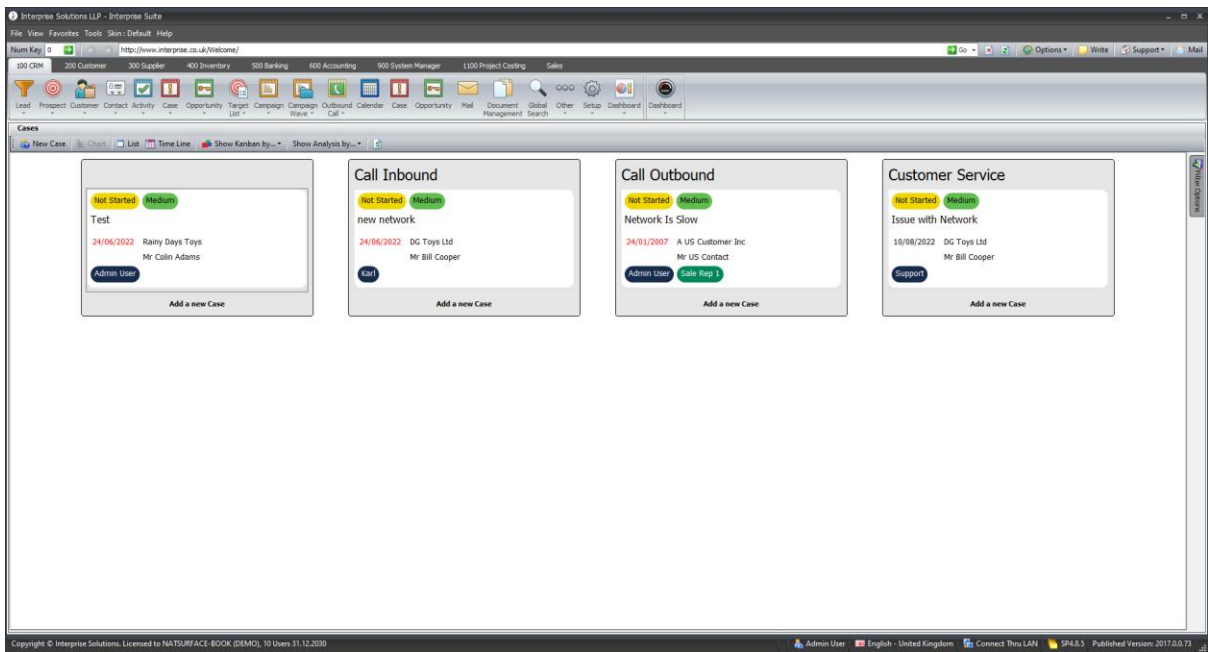


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Below is an example of it grouped by Category



The drag & drop still works.

NB. If grouping by due date the cases cannot be drag & dropped.



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## Opportunities Dashboard by Kanban.

The below is grouped by the Stage of the opportunity

The screenshot shows the Interprise Suite interface with the Opportunities dashboard. On the left, there are summary statistics:

- No. of Opportunities: 4.00
- Average Certainty: 100.000%
- Average Value: £ 18,850.00
- Forecast: £ 75,400.00
- Weighted Forecast: £ 75,400.00
- Weighted Average: £ 18,850.00

The main area features a 'Stage Analysis' donut chart with three segments: 'Another Meeting Required' (12.5%), 'Preliminary Quoted' (25%), and 'Revised Quote/Awaiting Order' (25%). Below the chart is a table of opportunities:

Stage	Team	Assigned To	Status	Est Close Date	Open Date	Customer Name	Contact Name	Opportunity Name	Territory	Priority	Sales Rep	Est Revenue
Preliminary Quo.	Sales Team	Admin User	🔥	31/01/2007	31/01/2007	A French Customer	Mr French Contact	Big Network		Medium	Sale Rep 1	£ 400.00
Another Meeting Required	Sales Team	Admin User	🔥	31/08/2022	01/09/2022	Plastic Power	Mr Mark McCann			Medium		£ 25,000.00
Revised Quote /	Sales Team	Admin User	🔥	01/09/2022	14/07/2022	The Dolls House	Mr Terry Smith	The Dolls House		Medium		£ 50,000.00
Preliminary Quo.	Sales Team	Admin User	🔥	23/01/2007	23/01/2007	Toys International UK Ld	Mr Toy Bay	Toys International UK Ld		Medium		£ 0.00

## Opportunities by Stage

The screenshot shows the Interprise Suite interface with the Opportunities dashboard in Kanban view. The opportunities are grouped into three columns:

- Another Meeting Required:** Contains one card for 'Sales Enquiry' (31/08/2022, Plastic Power, £25,000.00, Mr Mark McCann).
- Preliminary Quoted:** Contains two cards: 'Toys International UK Ld' (23/01/2007, Toys International UK Ld, £0.00, Mr Toy Bay) and 'Big Network' (31/01/2007, A French Customer, £1,000.00, Mr French Contact).
- Revised Quote / Awaiting Order:** Contains one card for 'Big Opportunity' (01/09/2022, The Dolls House, £50,000.00, Mr Terry Smith).

The Opportunity can be drag & dropped onto a new stage.



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Below are the opportunities grouped by Date

The screenshot shows the Interprise Suite interface with the Kanban view selected. The main content area is divided into three columns representing the months of January, August, and September. Each column contains one or more opportunity cards. Each card displays the opportunity's status (e.g., 'Not Started', 'In Progress', 'Completed'), priority (e.g., 'Medium'), and a brief description. For example, in January, there are two cards: one for 'Toys International UK Ltd' with a value of £0.00 and another for 'Big Network' with a value of £1,900.00. In August, there is one card for 'Sales Enquiry' with a value of £25,000.00. In September, there is one card for 'Big Opportunity' with a value of £50,000.00. Each card includes a date, a contact name, and an 'Admin User' button. At the bottom of each column is an 'Add a new Opportunity' button. The interface includes a top navigation bar with various icons and a footer with copyright information.

(NB. If grouping by date the opportunity cannot be drag & dropped).

The screenshot shows the Interprise Suite interface with the Kanban view selected, displaying activities grouped by month. The main content area is divided into five columns representing the months of February 2022, March 2022, May 2022, June 2022, and August 2022. Each column contains one or more activity cards. Each card displays the activity's status (e.g., 'Completed', 'Not Started'), priority (e.g., 'Medium'), and a brief description. For example, in February 2022, there are three cards: 'Call List TP', 'Call List TP', and 'discuss face masks'. In March 2022, there are three cards: 'Call List TP', 'Call List TP', and 'Call List TP'. In May 2022, there are three cards: 'discuss tyre order', 'tyre broken', and 'discuss plastic quote'. In June 2022, there is one card for 'problem with box'. In August 2022, there is one card for 'Call List TP'. Each card includes a date, a contact name, and an 'Admin User' button. At the bottom of each column is an 'Add a new Activity' button. The interface includes a top navigation bar with various icons and a footer with copyright information.

Example Calendar Kanban above.