

StageCraftZ

Kanban boards for any Microsoft Dataverse table.

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Publisher	Betters Agency LLC
Platform	Microsoft Dynamics 365 / Dataverse
Support	support@bettersagency.com
Documentation	https://bettersagency.com/stagecraftz/

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1 Before you start

StageCraftZ installs as a managed solution and runs entirely inside your Dataverse environment. Confirm the following before installing.

Requirement	Detail
Platform	Microsoft Dynamics 365 version 9.1 or later, or a Microsoft Dataverse environment
Client	Unified Interface. The legacy web client is not supported.
Permissions	System Administrator or System Customizer, both to install and to set up each table you want to board
Licensing	No additional Microsoft licence beyond the one your users already hold

StageCraftZ works with Dynamics 365 Sales, Customer Service, Field Service, Project Operations, Power Apps, and any model-driven app built on Dataverse.

2 Install the solution

- 1 **Get it from AppSource.** Open the StageCraftZ listing on Microsoft AppSource and select **Get it now**.
- 2 **Choose the environment.** Select the Dataverse environment to install into, accept the terms, and confirm.
- 3 **Wait for the import.** This normally takes a few minutes. Progress appears in the Power Platform admin centre under **Environments** > [your environment] > **Dynamics 365 apps**.
- 4 **Open the app.** When the status reads *Installed*, open **StageCraftZ** from your app list.

3 What gets installed

Component	Purpose
StageCraftZ app	Model-driven app containing the board and the pipeline settings page
Pipeline	Stores each board definition: name, table, and status column
Pipeline Stage	Stores the lanes for each pipeline: name, colour, type, SLA
User Preference	Stores each user's own card layout, per pipeline
Security roles	StageCraftZ User and StageCraftZ Administrator

Installing StageCraftZ does not modify your existing apps, forms, views, or business data.

4 Assign security roles

Assign these **in addition to** a user's existing roles. They grant access to StageCraftZ's own configuration tables only, never to your business data.

Role	Give it to	What it allows
StageCraftZ User	Anyone who works a board	View boards, drag cards between stages, create records, save a personal card layout
StageCraftZ Administrator	Whoever configures pipelines	Everything above, plus creating and editing pipelines and stages

A user still needs their normal privileges on the underlying records. StageCraftZ never grants access to data a user could not already see, and every read and write is performed as the signed-in user.

5 Finding your way around

The StageCraftZ app has two areas. **Work > Board** is where your team works. **Settings > Pipelines** is where an administrator defines what the boards look like.

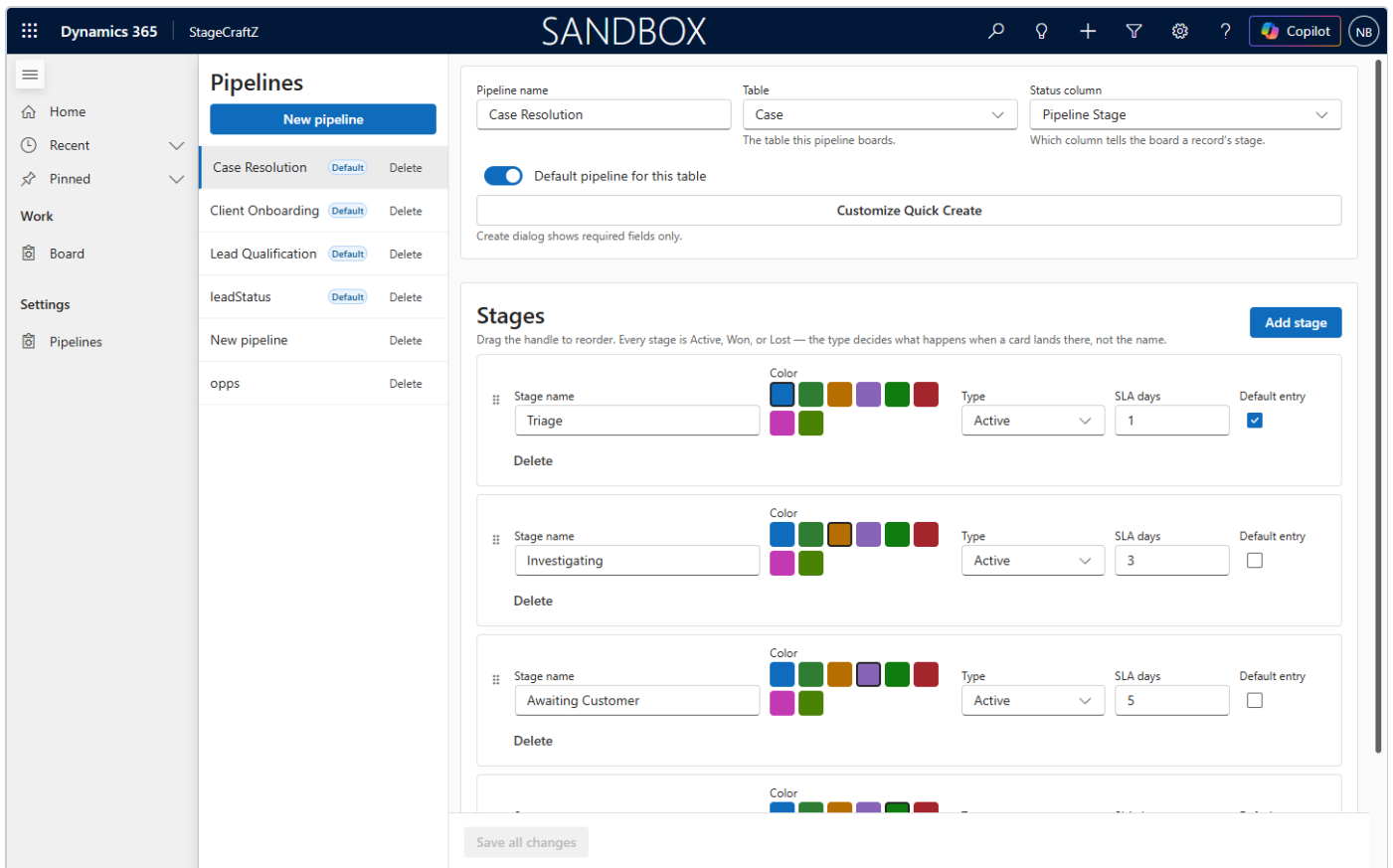


Figure 1. The app navigation. Board is under Work; Pipelines is under Settings. Most users only ever need Board.

6 Create your first pipeline

A *pipeline* is one board: a table, a set of lanes, and the rules for what happens when a card lands in each lane. Go to **Settings > Pipelines** to create one.

- 1 **Create the pipeline.** Select **New pipeline** and name it after the process — *Case Resolution*, *Client Onboarding*, whatever your team calls it.
- 2 **Choose the table.** Open the **Table** list and start typing to search; environments commonly hold several hundred tables. Only tables that can actually host a board are listed.

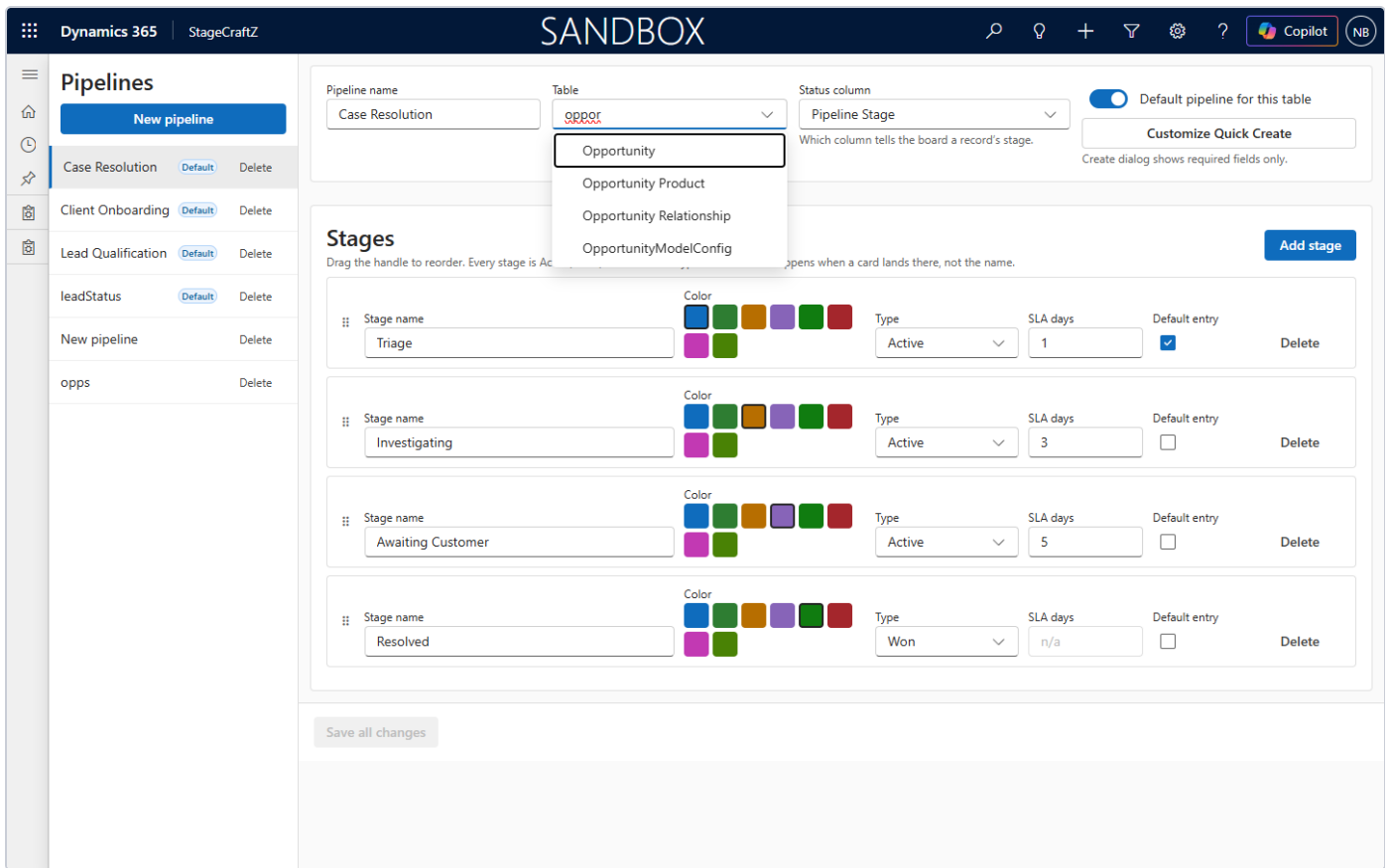


Figure 2. Type to filter the table list. Tables Dataverse marks as non-customisable are excluded, because they cannot accept the columns a board needs.

- 1 **Set up the table.** The first time you board a table the page shows “This table isn't set up for boarding yet” with a **Set up this table** button. Selecting it adds two columns to that table: **Pipeline Stage** (which lane a record is in) and **Board Order** (its position within the lane). No record data is changed. Allow up to a minute.
- 2 **Choose the status column.** This tells the board how to decide which lane a record belongs in.

Option	Use when
StageCraftZ lane lookup	You want lanes entirely your own, independent of anything the table already has. The most flexible choice, and the one to prefer.
A native choice or status column	You want the board to stay in step with a field the table already uses, such as a case's Status Reason. Moving a card updates that field too.

- 3 **Add your lanes.** Select **Add stage** for each column on the board and set its name, colour, type, SLA, and whether it is the default entry lane for new records. Drag the handle at the left of a row to reorder. Select **Save all changes**.

Pipelines

New pipeline

Case Resolution **Default** Delete

Client Onboarding **Default** Delete

Lead Qualification **Default** Delete

leadStatus **Default** Delete

New pipeline Delete

opps Delete

Stages editor

Pipeline name: Case Resolution Table: Case Status column: Pipeline Stage

The table this pipeline boards. Which column tells the board a record's stage.

☒ Default pipeline for this table

Customize Quick Create

Create dialog shows required fields only.

Stages

Drag the handle to reorder. Every stage is Active, Won, or Lost — the type decides what happens when a card lands there, not the name.

Add stage

Stage name	Color	Type	SLA days	Default entry	Delete
Triage	[Color palette]	Active	1	☒	Delete
Investigating	[Color palette]	Active	3	☐	Delete
Awaiting Customer	[Color palette]	Active	5	☐	Delete
Resolved	[Color palette]	Won	n/a	☐	Delete

Save all changes

Figure 3. The Stages editor. Each row is one lane on the board. The pipeline list on the left shows every board in the environment; the *Default* badge marks the one used when no other is chosen for that table.

IMPORTANT

Type, not name, drives behaviour. Only lanes typed *Active* count toward open-pipeline metrics, and dropping a card into a *Won* or *Lost* lane closes the record accordingly. Renaming “Closed Won” to “Delivered” changes nothing — which is exactly the point. **SLA days** is how long a card may sit in that lane before it counts toward *Past SLA*.

Several pipelines on one table

You can create more than one pipeline against the same table, which is useful when different teams work the same records differently. Mark one as **Default pipeline for this table**; users switch between the rest with the selector on the board.

7 Using the board

Go to **Work > Board** and pick a pipeline from the selector at the top right.

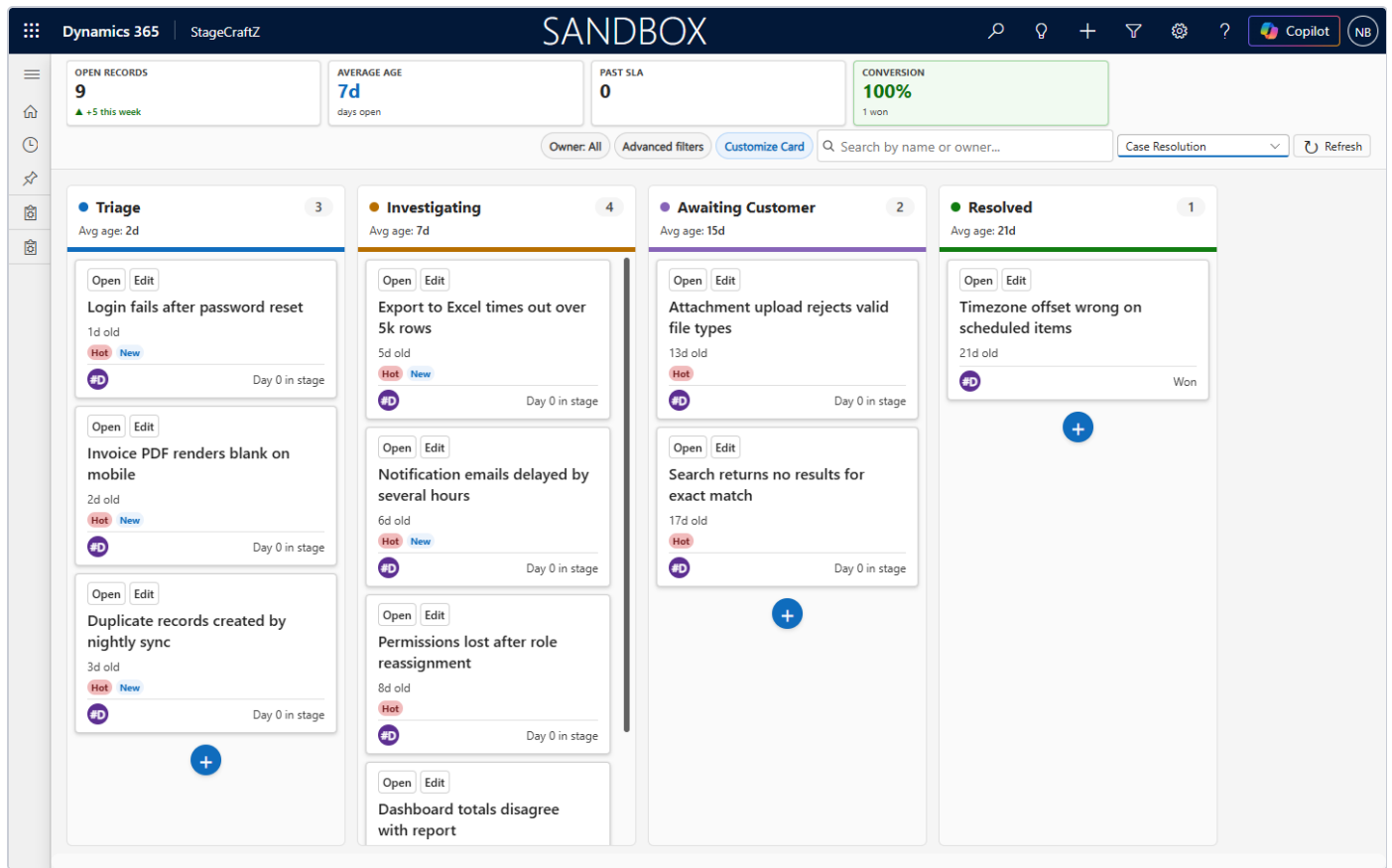


Figure 4. A board. Each column is a lane, each tile a record. The strip along the top summarises the whole board; the toolbar below it holds owner scope, filters, card layout, search, and the pipeline selector.

Reading the KPI strip

Metric	Meaning
Open records	Records sitting in lanes typed <i>Active</i>
Average age	Mean days since those records were created
Past SLA	Cards that have been in a lane longer than that lane's SLA days
Conversion	Share of records in lanes typed <i>Won</i>

Each lane header also carries its own record count and average age, so you can see where work is piling up without reading a single card.

Moving records

Drag a card to another lane and the record updates immediately. Drop it between two cards to set its position by hand, which is useful when priority is not the same as date order.

Keyboard and accessibility

Cards can be moved without a mouse: focus a card and press **Enter** or **Space** to pick it up, use the arrow keys to move it, and press **Escape** to cancel. Every move is announced to screen readers. Lane and field reordering also work from the keyboard.

8 Creating records from the board

Select **+** at the bottom of any lane. The dialog names the lane it will create into, and the new record lands there — no dragging afterwards.

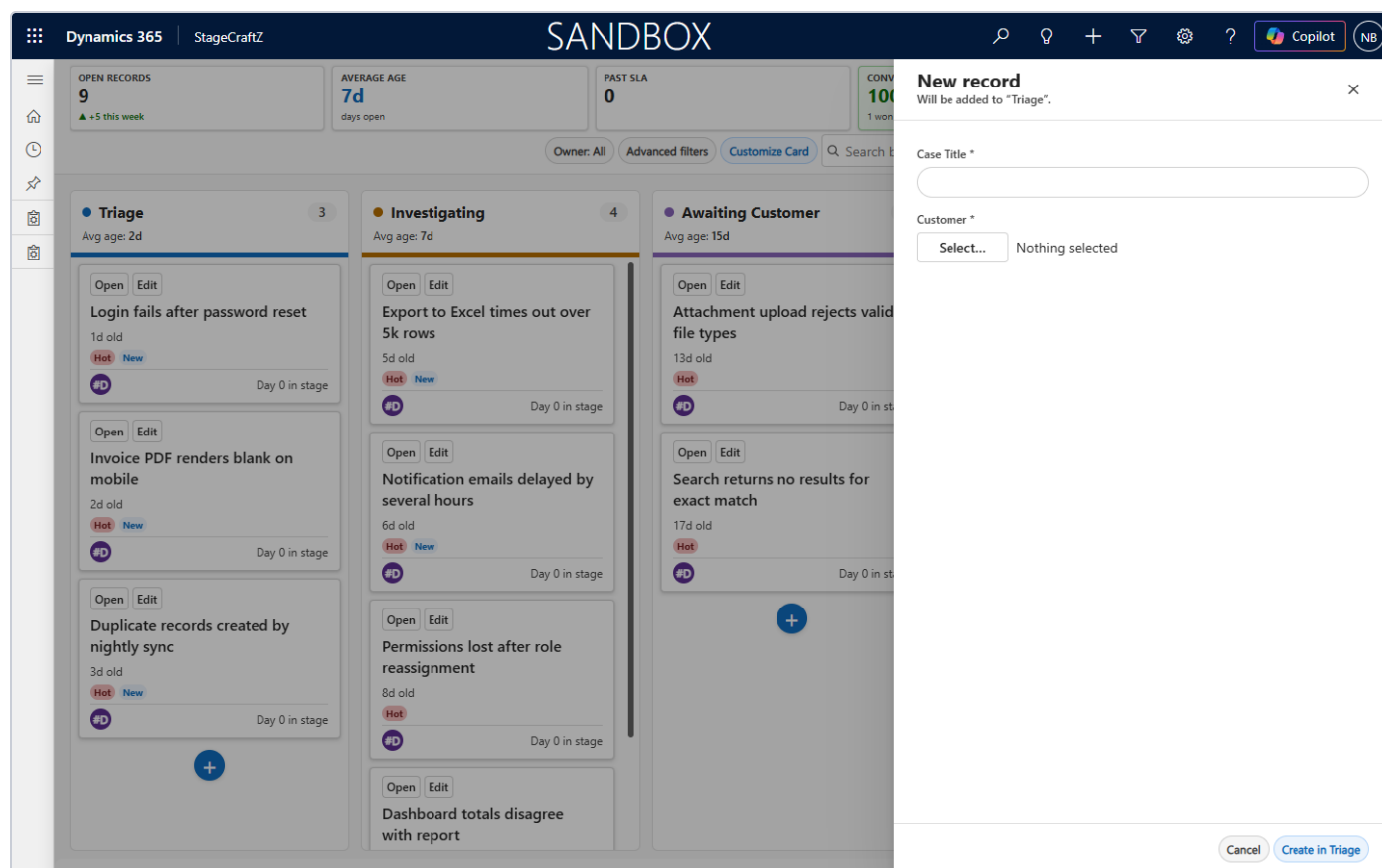


Figure 5. Creating a record directly into a lane. By default the dialog shows only the columns the table requires; section 11 explains how to add more.

9 Searching and filtering

Three tools narrow the board, and they combine:

- **Search** matches record name or owner.
- **Owner** switches between everyone's records and just your own.
- **Advanced filters** builds precise conditions with AND/OR groups.

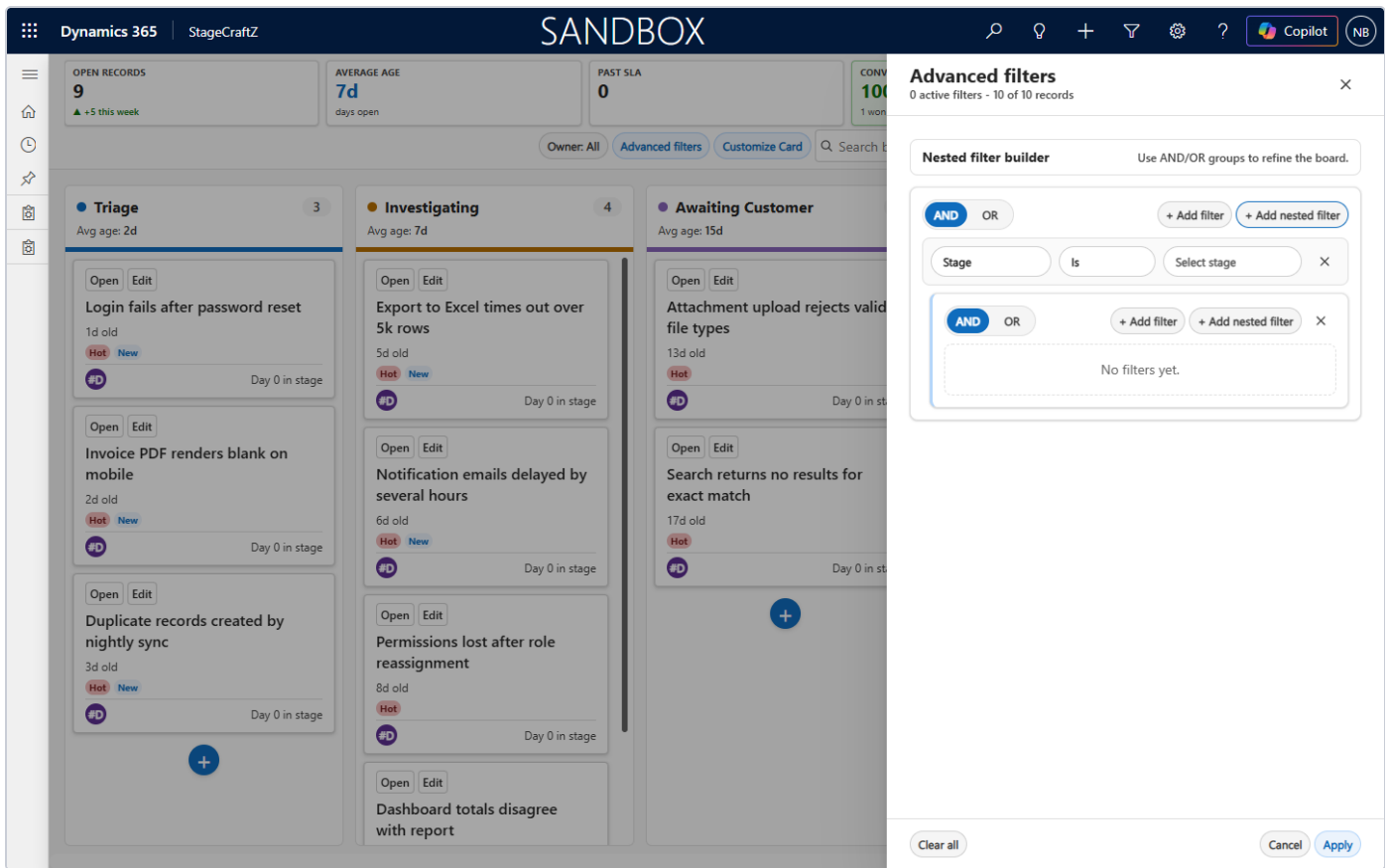


Figure 6. The nested filter builder. Each group is AND or OR, and groups can contain other groups — enough to express conditions a simple filter row cannot. The header shows how many records currently match.

10 Customising your card

Select **Customize Card** to choose what appears on a card. A live preview updates as you work.

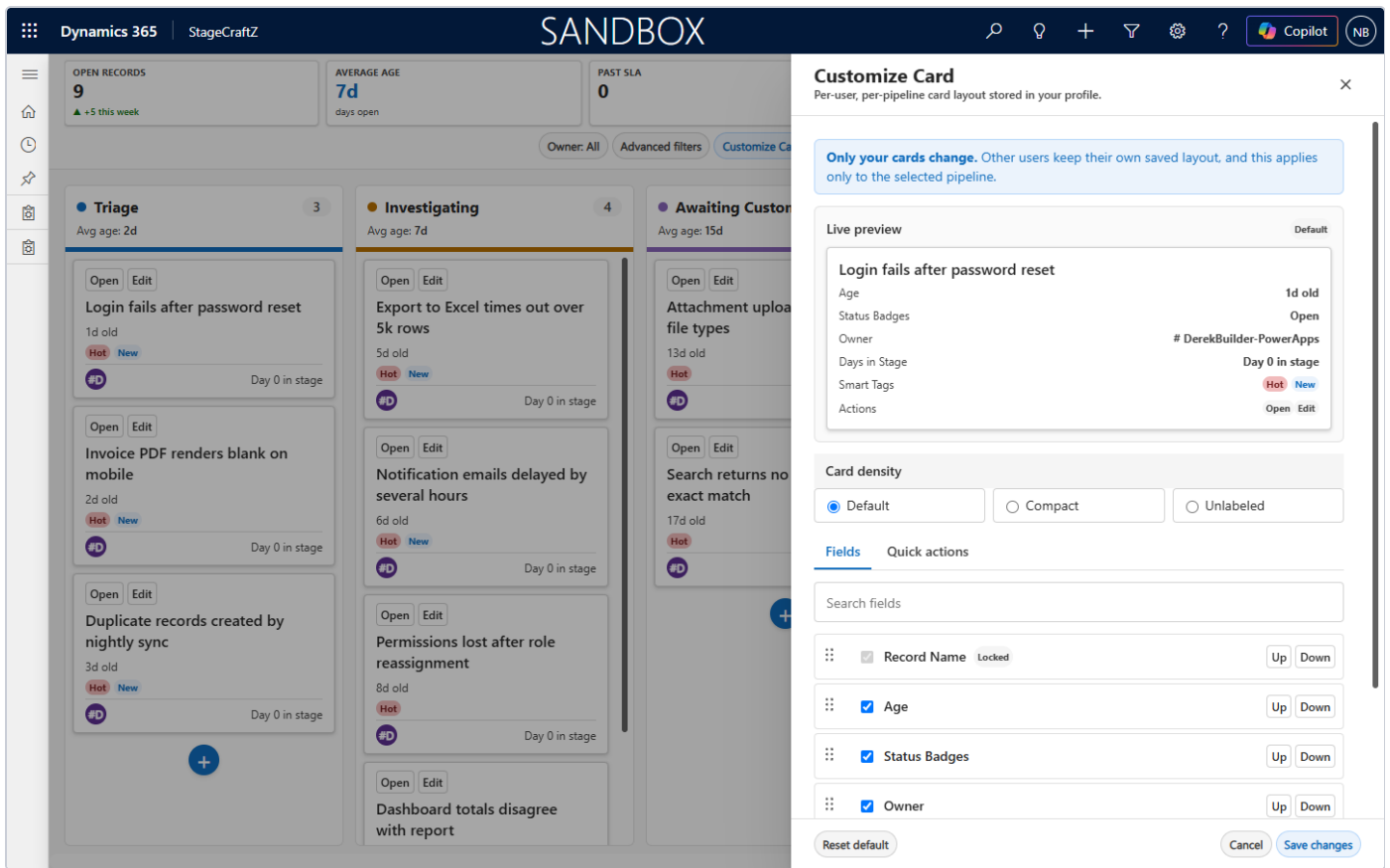


Figure 7. Card customisation. Tick fields to show them, drag the handle (or use Up / Down) to order them, and pick a density. **Default** shows field labels, **Compact** tightens spacing, **Unlabeled** drops labels for the densest view.

THIS IS PERSONAL

Your card layout is stored against your own user profile, per pipeline. Changing it never affects what anyone else sees, and every user can arrange their own. **Reset default** returns to the shipped layout.

Quick actions

The **Quick actions** tab controls the buttons on each card — the shortcuts for opening or editing a record without leaving the board.

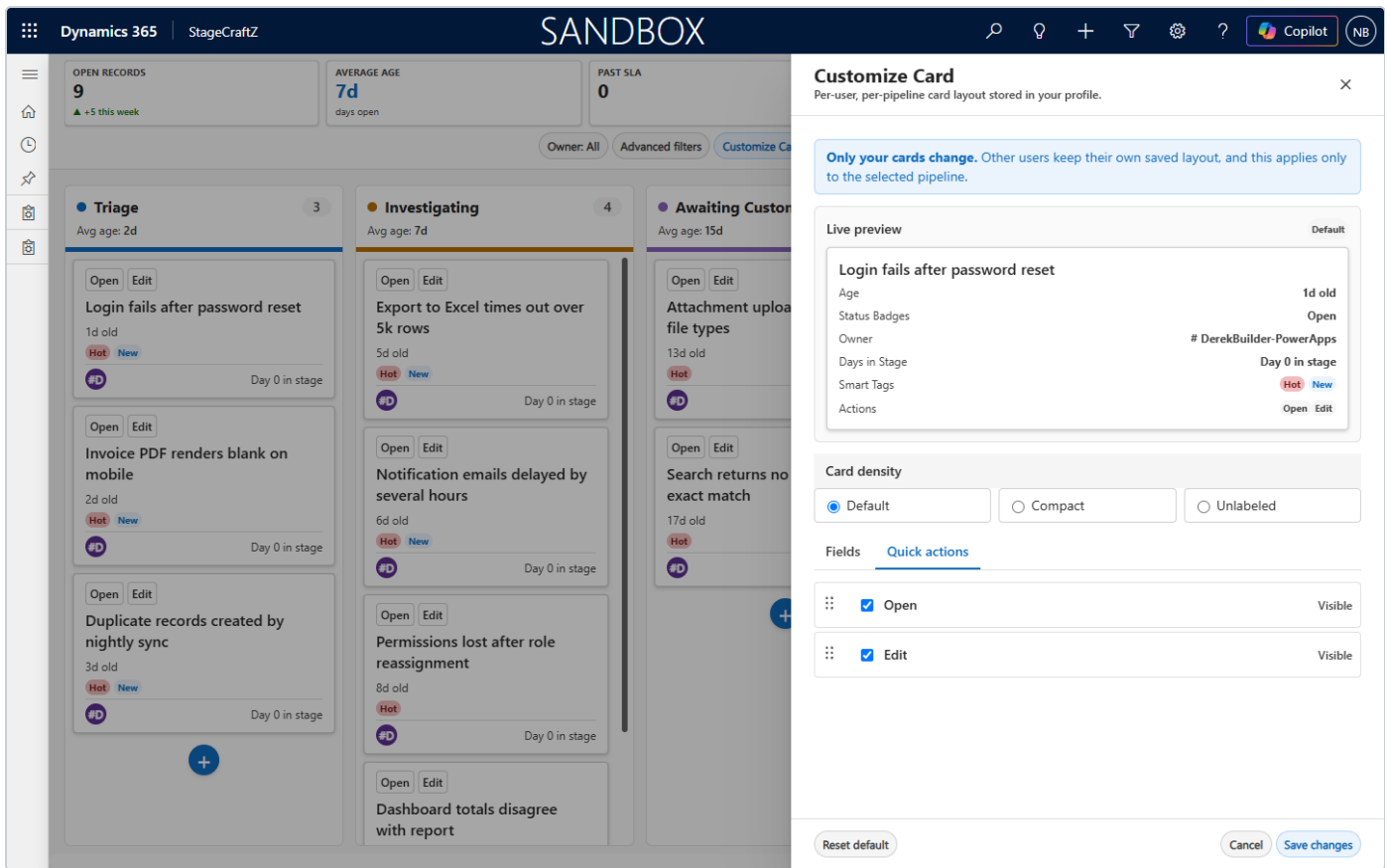


Figure 8. Choose which action buttons appear on every card in this pipeline.

11 Customising the create dialog

By default the board's create dialog shows only the columns your table requires, which keeps it fast. To capture more at creation time, open **Settings > Pipelines**, select the pipeline, and choose **Customize Quick Create**.

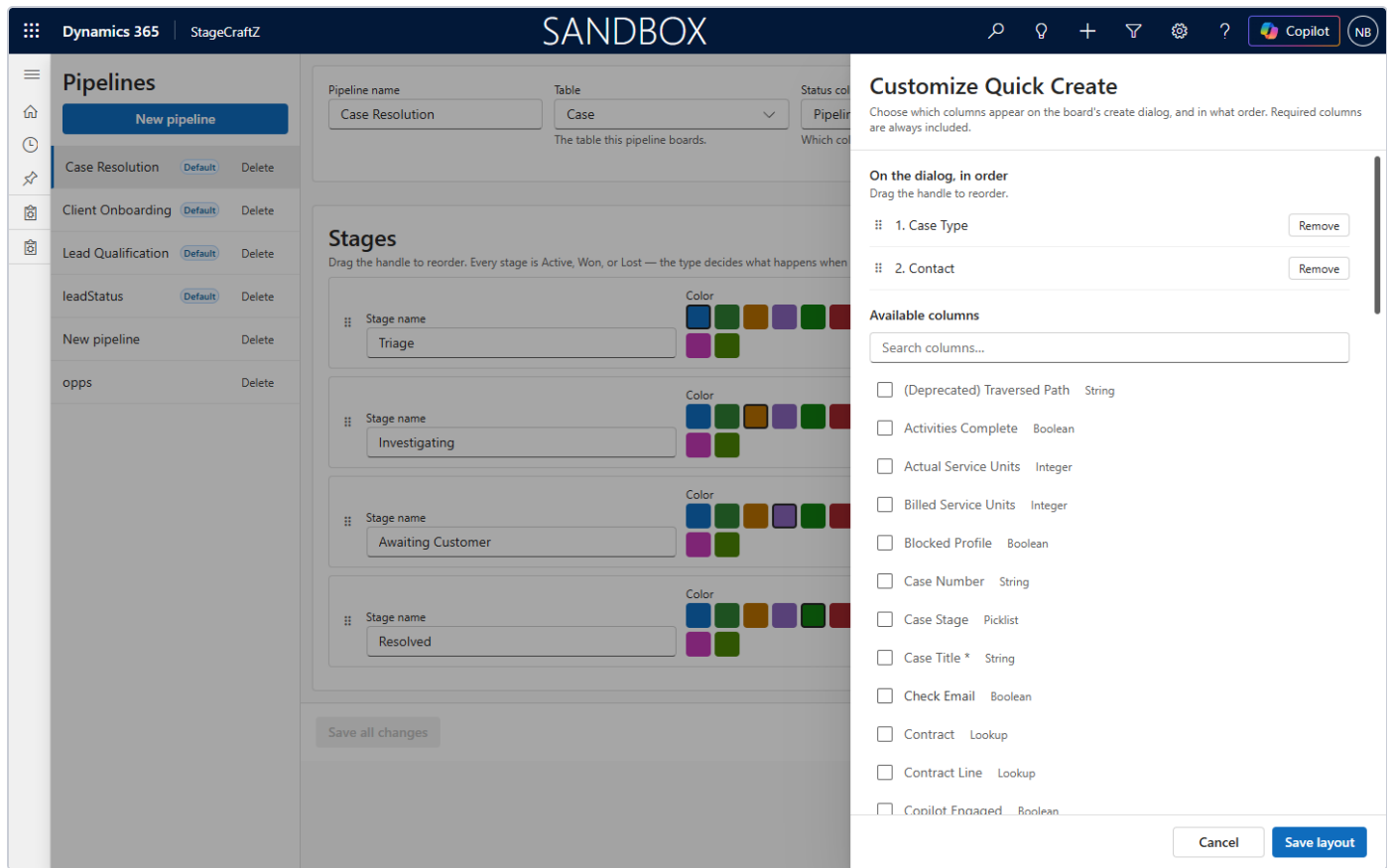


Figure 9. Tick columns to add them, then drag the handle to set the order people fill them in. The chosen columns appear at the top under *On the dialog, in order*.

Required columns are always included whether or not you tick them — without them the dialog could not save. Unlike card layout, this setting is **shared**: it applies to everyone using that pipeline.

12 Adding StageCraftZ to Sales Hub or your own app

StageCraftZ installs its own app, and most teams start there. But people work where their records already are, so you can also place the StageCraftZ pages directly into an app your users open every day. The solution ships two pages you can add:

Page	Put it where
Board	A working area users see daily, for example a <i>Sales</i> or <i>Work</i> group
Pipelines	A settings or administration area — only administrators need it

- 1 **Open the app for editing.** Go to make.powerapps.com, confirm the environment selector at the top right shows the right environment, then select **Apps**. Find the app you want to extend (for example *Sales Hub*), select the ... menu beside it, and choose **Edit**.

- 2 **Add the page.** In the left **Pages** pane select + **Add page**, choose **Custom page**, then **Use an existing page**. Pick **Board** and confirm.
- 3 **Place it in the navigation.** With the page selected, use the **Navigation** pane to move it into the area and group where users will look for it, and give it a title that means something to them.
- 4 **Repeat for the settings page, if you want it here.** Add **Pipelines** the same way. You can skip this and leave pipeline configuration in the StageCraftZ app.
- 5 **Save and publish.** Select **Save**, then **Publish**. An already-open session may need a refresh.
- 6 **Check the security roles.** Hosting the page elsewhere does not change permissions. Users still need **StageCraftZ User**, and anyone configuring pipelines still needs **StageCraftZ Administrator**. See section 4.

BEFORE YOU EDIT A MICROSOFT APP

Sales Hub and the other first-party apps are Microsoft-managed. Editing one creates an unmanaged customisation layer over it. That is supported, but the layer is yours to maintain and can interact with future Microsoft updates to the app. If you would rather not take that on: keep using the StageCraftZ app as installed, or make a copy of Sales Hub (**Save As** in the app designer) and add the pages to your copy.

Adding a page to your app never modifies the StageCraftZ managed solution, and does not affect your ability to update StageCraftZ later.

13 Troubleshooting

Symptom	Resolution
The table I want is not listed	The picker shows only tables that can host a board. Dataverse marks most internal system and configuration tables as non-customisable, and those cannot accept the two columns a board needs.
"This table isn't set up for boarding"	Open Settings > Pipelines , select the pipeline, and use Set up this table .
Cards jump back to another lane	Occurs when the pipeline uses a native choice column, two lanes point at the same value, and the table has not been set up yet. Run Set up this table ; once the lane lookup exists, lanes sharing a value stay distinct.
Manual card order does not persist	A small number of tables will not accept the Board Order column. The board still works and orders cards by creation date.
A user sees an empty board, or cannot drag	Confirm they hold StageCraftZ User in addition to their normal roles, and have read and write access to the underlying records.

A field is missing from the create dialog

The dialog shows required columns plus whatever the administrator added under **Customize Quick Create**. See section 11.

14 Uninstalling

Uninstall StageCraftZ from your environment's solution list. This removes the app, its pages, and the three configuration tables along with their pipeline definitions.

NOTE

The **Pipeline Stage** and **Board Order** columns added to your tables are **not** removed, and neither is the data in them. This is deliberate: those columns live on your tables, and removing them would delete data from records that belong to you. Delete them manually if you want them gone.

15 Data handling and support

StageCraftZ runs entirely inside your Dataverse environment. It sends no business data to Betters Agency or to any third party, requires no external service, and adds no service account to your tenant. All reads and writes go through Microsoft's published APIs as the signed-in user, subject to the security roles you assign.

For support, email support@bettersagency.com. Please include your environment URL, the StageCraftZ version, the pipeline and table involved, and what you expected to happen versus what happened.

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