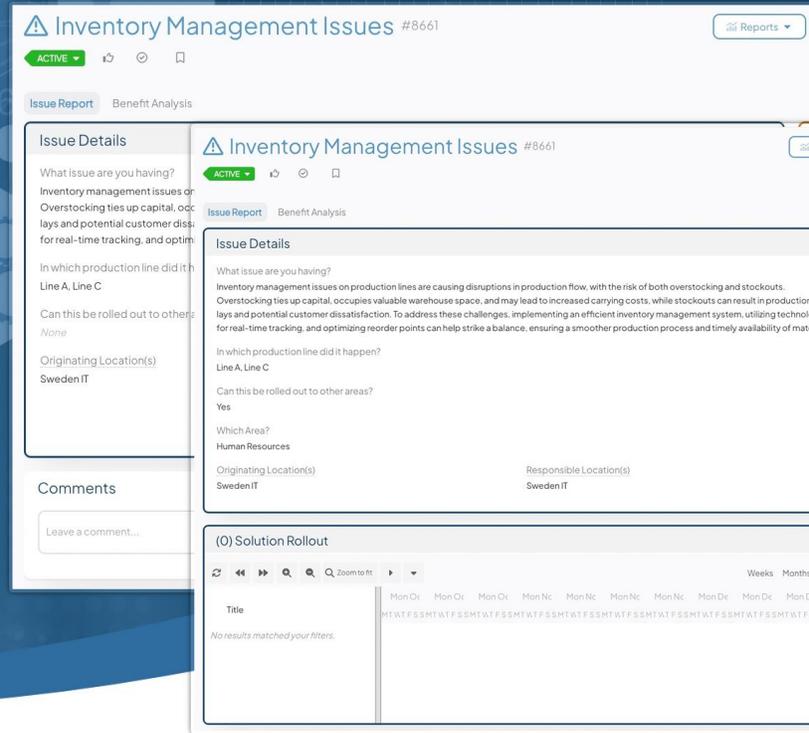


KaiNexus

Smart Templates & Workflow Automation

Attribute, Due Date, & Field Syncing and Conditional Attribute Values, Tabs, & Panels



What Are Smart Templates & Workflow Automation?

Smart Templates & Workflow Automation features allow you to build intelligent, responsive templates in KaiNexus. These tools automate repetitive tasks, dynamically adjust the user interface, and ensure data consistency across related Items. By adding logic, you can create streamlined, context-aware Templates that adapt in real time to your team's needs.

Why Smart Templates & Workflow Automation Matter?

Smart Templates reduce friction, boost efficiency, and create a more intuitive experience for users by eliminating unnecessary clicks and information overload. They ensure that data stays aligned between related Items, surface only what's relevant, and guide your teams through complex processes with minimal manual effort.

With Smart Templates & Workflow Automation, you can:

- Show only the tabs and panels relevant to the current Item or process phase.
- Keep critical data synced between parent and child Items automatically.
- Automate task management and due date alignment to save time.
- Ensure consistent logic and structure across all improvement work.

Key Features

Conditional Tabs and Panels

Dynamically display or hide specific Tabs and Panels on an Item based on Attribute Values. Simplify complex templates by surfacing only the information needed for a given context.

<https://support.kainexus.com/conditional-tabs-and-panels>

Due Date Syncing

Automatically align due dates between parent and child Items. Keep timelines accurate without manual updates when project phases or tasks shift.

<https://support.kainexus.com/due-date-syncing>

Field & Attribute Syncing

Ensure consistency by syncing Fields and Attribute values between related Items. Configure the sync direction to be parent-to-child, child-to-parent, or bi-directional.

<https://support.kainexus.com/field-syncing>

<https://support.kainexus.com/attribute-syncing>

