

User Manual

Aptean Food and Beverage ERP

Document Link

Product Documentation



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Release notes

Article • 1/30/2026 • 1 min read

To view what's new or changed in each release of the Aptean Document Link extension, select the specific release version.

Date	Release version	Description
January 2026	2601.0.0.0	Feature release
November 2025	2502.2.0.0	Stability release
October 2025	2502.1.0.0	Stability release
October 2025	2502.0.0.0	Feature release
July 2025	2501.0.0.0	Feature release
April 2025	1.7.229443.0	Stability release
August 2024	1.6.177666.0	Stability release
August 2024	1.5.175615.0	Stability release
April 2023	1.4.91653.0	Stability release
May 2022	1.3.48465.0	Stability release



2601.0.0.0

Release Note • 1/28/2026 • 1 min read

Enhancements/Modifications

With this release of the Aptean Document Link extension,

- Updates to ensure interoperability with the recent changes in the Aptean Formulation Management extension. For more information, see [Highlights of Formulation Management, version 2601.0.0.0](#).
- Updates to ensure interoperability with the recent changes in the Aptean Non Conformances extension. For more information, see [What's new in Non Conformances, version 2601.0.0.0](#).



2502.2.0.0

Release Note • 11/12/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Document Link extension, the system displays new attachments on the **Attachments** page and the **Attachment Type** field value is set to *Link* or *Storage* based on the existing configuration after upgrading to the next version. This enhancement modifies an earlier fix for the bug ID [#336966](#).



2502.1.0.0

Release Note • 10/31/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
336966	The system fails to display existing attachments on the Attachments page for existing records where the Attachment Type field value was previously set to <i>Link</i> or <i>Storage</i> but is left blank after upgrading to the next version.

 Note

This bug fix has been modified to ensure new attachments are also displayed after upgrading to the next version. For more information, see [version 2502.2.0.0](#).



2502.0.0.0

Release Note • 10/22/2025 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Apteian Compliance Documents and Shop Floor Production extensions. To know more, see [What's new in Compliance Documents, version 2503.0.0.0](#) and [What's new in Shop Floor Production, version 2512.0.0.0](#).



2501.0.0.0

Release Note • 7/30/2025 • 1 min read

Features

With the features added in this release of the Aptean Document Link extension, you can:

- Add the category code for the attachment documents. To know more, see [Attach files](#).
- View the list of the attached document. To know more, see [Manage attached documents](#).
- View the attachments on the **Attachments** FactBox. To know more, see [View attachment information on the FactBox](#).

UI/UX changes

The following UI/UX changes have been made in this release.

- The **Attachments** page has been added.
- The **Category Code** field has been added to the **Attached Documents** page.



1.7.229443.0

Release Note • 4/29/2025 • 1 min read

Enhancements/Modifications

The translation files for the following languages have been updated with standard texts for better readability.

- Chinese (zh_CN)
- Swedish (sv-SE)



1.6.177666.0

Release Note • 8/20/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Document Link extension, the process has been enhanced to manage the *User Group* and *User Group Permission Set* tables. This ensures compatibility with both current and future versions of Business Central, even when these tables are deprecated.

Note

The *User Group* and *User Group Permission Set* tables are deprecated in Business Central, version 25.



1.5.175615.0

Release Note • 8/8/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Document Link extension, modifications have been made to accommodate the following changes:

- Enhanced application interaction: Procedures have been added to enhance the application interaction, improve upgrade tag management, streamline upgrade and installation processes, and provide additional flexibility by managing upgrades on a per-company and per-database basis.
- Application area refresh: Updates have been implemented to improve the application area refresh process by integrating a new procedure into the *Enable* codeunit.
- Improved management of install and upgrade code: The *Install* and *Upgrade* codeunits have been updated to streamline the handling of installation, reinstallation, and upgrade processes, ensuring smoother transitions and minimizing disruptions during these operations.
- Centralized license management procedures: The existing license management codeunit has been modified to use centralized license management procedures, further reducing the need for application-specific adjustments.



1.4.91653.0

Release Note • 4/29/2023 • 1 min read

Enhancements/Modifications

Modifications were made for this extension to work seamlessly with the Aptean Compliance Documents extension. To know more, see [What's new in version 1.7.92887.0](#).



1.3.48465.0

Release Note • 4/29/2023 • 1 min read

Enhancements/Modifications

The enhancements in this release are listed below:

- A localized version of Document Link extension is made available for the Switzerland market with the addition of German language code [de-CH].
- Minor technical changes were made to keep our apps in line with *updated* coding guidelines for Business Central.



Introduction

Article • 2/4/2026 • 1 min read

The Apteian Document Link (DCL) extension enables you to link documents and attachments to Microsoft Dynamics 365 Business Central entities (for example, compliance documents) and store them outside Business Central using Azure Storage.

! Note

Azure Storage is used only for attachments created through the Apteian [Compliance Documents](#) or Apteian [Shop Floor Production \(BC\)](#) extension. Attachments added from other Business Central pages use the standard attachments functionality and are not stored in Azure.



Setup

Article • 12/20/2024 • 1 min read

The following setups are required.

- [Manage permission sets](#)
- [Set up document link](#)



Manage permission sets

Article • 12/20/2024 • 3 min read

Permission sets in Business Central define a user's access level to various features and data within this extension.

We provide the following system permission sets:

- Direct
- Indirect

Direct permission sets

Users with this permission set can perform specific actions directly without requiring additional approvals or workflows. These sets include permissions to read, modify, delete, and create data.

The direct permission set ID for this extension is *DOCUMENTLINKFDW*.

Indirect permission sets

Users with this permission set can perform specific actions. This is used in conjunction with other permission sets to allow you to perform certain actions. These permissions typically involve additional conditions or approvals before the action can be completed.

The indirect permission set ID for this extension is *DOCUMENTLINKBASICFDW*.

User-defined permission sets

In addition to the system permission sets we provide, you can create new permission sets or copy system permission sets and modify or delete access to specific entities according to your requirements. For more information, see [Assign permissions to users and groups](#).

Assign a permission set

1. Select the Search icon , enter **Users**, and then choose the related link.
The **Users** list page opens.
2. Navigate to the username for which you want to assign the permission set and select it.
The **User Card** page opens.
3. On the **User Permission Sets** FastTab, in the **Permission Set** field, enter the valid permission set for this extension.



Document Link

The associated fields are automatically updated based on the entered value. The user has the necessary permissions to use the features of the Aptean Document Link extension, ensuring secure and role-based access.



Set up document link

Article • 4/29/2023 • 3 min read

To link documents in Microsoft Dynamics 365 Business Central to Azure Storage, the correct URLs need to be specified on the **Document Link Setup** page.

1. Select the Search icon , enter **Document Link Setup**, and then choose the related link.

The **Document Link Setup** page opens.

2. In the **BlobStorage Connection Code** field, select the AssistEdit button to select a code.

This specifies the BlobStorage Connection Code which is used to save the synchronization files (see [Blob Storage Connections](#)).

The setup for Document Link is now completed and can be used in combination with for instance the Compliance Documents extension.



Attach files

Article • 7/30/2025 • 8 min read

You can attach documents to source records directly from supported pages using the **Attachments** FactBox.

- On the source document, select the document count on the **Attachments** FactBox to navigate to the **Attached Documents** page.
- Enter the required information in the following fields:

Field	Description
Attach a file	Select the file name of the attachment.
File Type	Specifies the type of the attached file.
File Extension	Specifies the file extension of the attached file.
Category Code	Enter the code to group attachments.
Attached Date	Specifies the date the file was attached.
User	Specifies the user who attached the file.
Flow to Purch. Trx	Select the checkbox if the attachment should flow to purchase transactions.
Flow to Sales Trx	Select the checkbox if the attachment should flow to sales transactions.
Flow to Service Trx	Select the checkbox if the attachment should flow to service transactions.

1. On the action bar, select **Attachments**.
The **Attachments** page opens.



2. In the **Attachment** field, click *Select File*.



A dialog box, **Select a File to Upload** opens.

3. Select **Choose** and select the file.
The **Attachments** page shows information about the file name, file extension, file type, the user who has attached the file and the date/time.



To download the attached file

1. Navigate to the desired line.
2. In the **Attachment** field, select the link to download the attached file.



Alternatively, on the action bar, select **Preview**.



A file (with the same filename) can be linked multiple times to one or more entities.

To delete the attached file

The attached file can be deleted as well.

1. Navigate to the desired line.
2. On the action bar, select **Manage** > **Delete**.



A dialog box appears with the message, **Go ahead and delete?**

3. Select **Yes**.
4. Select **OK** in the **File is deleted** dialog box.

The file is now deleted from Dynamics 365 Business Central and Azure Storage. When deleting a file that is attached to multiple entities and therefore has the same Globally Unique Identifier (GUID), the file will not be deleted from Azure Storage. The file will only be deleted from Azure Storage when the last attachment on Dynamics 365 Business Central is also deleted.



Deployment instructions

Article • 4/29/2023 • 1 min read

To set up the Aptean **Document Link** extension on your Business Central environment, click the corresponding links in the table.

Item	Link
Prerequisites	Click here
App specific instructions	Click here



Manage attached documents

Article • 7/30/2025 • 2 min read

You can use the **Attachments** page to view all attachments across records.

To view attachments, follow these steps:

- 1. Select the Search icon , enter **Attachments**, and then choose the related link.
- 2. The **Attachments** page opens and the system displays the following fields:

Field	Description
Table Name	Displays the name of the table that the attachment is associated with.
Table ID	Displays the ID of the table that the attachment is associated with.
No.	Displays the number of the record that the attachment is associated with.
Attachment Name	Displays the name of the attached file.
File Type	Displays the type of attached file.
File Extension	Displays the extension of the attached file.
Category Code	Displays the code to group attachments using a predefined category.
Attached Date	Displays the date when the file was attached.
User	Displays the user who attached the file.



View attachment information on the FactBox

Article • 7/30/2025 • 1 min read

The **Attachments** FactBox displays the number of attachments in the **Documents** field value. Select the **Documents** field value then navigate to the **Attached Documents** page. To Know more, see [Attach files](#).

You can view the attached documents on the following pages:

- Release Production Order
- Simulated Production Order
- Planned Production Order
- Firm Planned Prod. Order
- Warehouse Shipment
- Warehouse Receipt
- Lot No. Information List
- Lot No. Information Card
- Posted Warehouse Receipt
- Posted Warehouse Receipt List
- Posted Warehouse Shipment
- Posted Warehouse Shipment List

