User Manual
Aptean Food and Beverage ERP

Filter Groups

Product Documentation

aptean

Contents

Release notes
- 1.17.0.0
- 1.16.279883.0
- 1.15.230554.0
- 1.14.191805.0
- 1.13.191701.0
- 1.12.177563.0
- 1.11.175653.0
- 1.10.165155.0
- 1.9.155023.0
- 1.8.147505.0
- 1.7.143092.0
- 1.6.91574.0
- 1.5.69628.0
- 1.4.61092.0
- 1.0.0.0

Introduction

Setup
- Manage permission sets

Filter Groups

Cue Definitions
- Introduction
- Create Cue for a profile
- Set up a color indicator on Cues

Release notes

Article • 6/24/2026 • 1 min read

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

Date	Release version	Description
June 2026	1.17.0.0	Minor release
November 2025	1.16.279883.0	Stability release
April 2025	1.15.230554.0	Stability release
October 2024	1.14.191805.0	Platform release
October 2024	1.13.191701.0	Platform release
August 2024	1.12.177563.0	Stability release
August 2024	1.11.175653.0	Stability release
June 2024	1.10.165155.0	Stability release
April 2024	1.9.155023.0	Stability release
March 2024	1.8.147505.0	Stability release
February 2024	1.7.143092.0	Stability release
April 2023	1.6.91574.0	Stability release
December 2022	1.5.69628.0	Stability release
September 2022	1.4.61092.0	Feature release
August 2020	1.0.0.0	Feature release

1.17.0.0

Release Note • 6/24/2026 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
376396	The system fails to display the correct order counts on route-based dashboard tiles on the Role Center home page on Fridays, causing all tiles to show 0 orders.

1.16.279883.0

Release Note • 11/26/2025 • 1 min read

Resolved issues

The following issues have been resolved in this release.

ID	Description
333268	The system incorrectly repeats the **Cue ID** field value on the **Cue Definitions** page, where the cue ID restarts at 1 from the 16th entry onward and continues repeating for subsequent entries. Additionally, the system opens the wrong cue definition page when you select a cue.
305178	An error occurs when changing the application language on the **My Settings** page because the system incorrectly handling the translation of the **New** and **In Progress** filter values on the **Filter Group Card** page. This incorrect translation causes the filter group to fail and prevents it from functioning as expected.
332543	An error occurs when changing the application language because the system fails to translate the *Completely Shipped* and *Completely Picked* filter values on the **Filter Group Card** page.

1.15.230554.0

Release Note • 4/30/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Filter Group extension,

- The translation file for the Chinese (zh-CN) language has been added.
- The translation file for the Swedish (sv-SE) language has been updated with standard texts for better readability.

1.14.191805.0

Release Note • 10/29/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Filter Group extension, the *Power BI Report Spinner Part* object has been removed from the *FilterGroupsRoleCenterFDW* page to ensure compatibility with Business Central, version 26.

1.13.191701.0

Release Note • 10/28/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Filter Group extension, the *Power BI Report Spinner Part* object has been made obsolete and replaced with *Power BI Embedded Report Part* on the *FilterGroupsRoleCenterFDW* page to ensure compatibility with Business Central, version 26.

1.12.177563.0

Release Note • 8/20/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Filter Group 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.

1.11.175653.0

Release Note • 8/8/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Filter Group 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.

1.10.165155.0

Release Note • 6/7/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Filter Group extension, codeunit changes have been made to address the warnings encountered during pipeline execution when upgrading to Business Central version 24.2.

1.9.155023.0

Release Note • 4/17/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
189957	On the **Filter Group Card** page, the filter groups fail to process the Date Formula as expected.

1.8.147505.0

Release Note • 3/8/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Filter Group extension, the **O365InvoicingRCExtFDW** and **O365SalesActivitiesRCExtFDW** pages have been removed to align with the Business Central version 24 upgrade.

1.7.143092.0

Release Note • 2/14/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Filter Group extension, the **O365InvoicingRCExtFDW** and **O365SalesActivitiesRCExtFDW** pages have been obsoleted to align with the Business Central version 24 upgrade.

1.6.91574.0

Release Note • 4/29/2023 • 1 min read

Resolved Issues

The following issue has been fixed in this release:

ID	Description
110454	On the **Filter Groups** page, an error occurs when one of the **Table No.** field value is left blank.

1.5.69628.0

Release Note • 4/29/2023 • 1 min read

Resolved Issues

The issues that were addressed in this release are listed in the following table:

ID	Description
81773	The alignment of data cues and font size of the heading are not in line with standard Business Central.
78376	In the Dutch localization, the color of the Aptean Food & Beverage ERP Activities data cues is incorrect.

1.4.61092.0

Release Note • 4/29/2023 • 1 min read

Features

It is possible to create User-defined Cues for multiple Profile IDs that reflect on respective Role Center Pages. In addition, you can set up color indicators based on the Threshold of the Cues. For more information, see Cue Definitions.

1.0.0.0

Release Note • 4/3/2023 • 1 min read

Features

The Filter Groups (FGR) extension offers the ability to efficiently use the filtering function.

- You can now set multiple filters on any given table within Microsoft Dynamics 365 Business Central. For more information, see Filter Groups.
- You can now distinguish different types of filter groups. For more information, see Filter Group Types.

Introduction

Article • 4/29/2023 • 1 min read

The Aptean Filter Group (FGR) extension enables multiple filters to be set on tables in Business Central and allows these filter settings to be saved and reused, for example, when using the Status Management extension.

It is possible to set up multiple filters on the field numbers linked to the selected table number in the filter group header. These filter settings will be applied when the filter group is selected, for example, in a status management flow.

Setup

Article • 12/23/2024 • 1 min read

The following setup is required.

- Manage permission sets

Manage permission sets

Article • 12/23/2024 • 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 *FILTERGROUPSFDW*.

Indirect permission sets

Users with this permission set can perform specific actions. This is used in conjunction with other permission sets and typically involves additional conditions or approvals before an action can be completed.

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

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.
   The associated fields are automatically updated based on the entered value. The user has the necessary

permissions to use the features of the Aptean Aptean Filter Group extension, ensuring secure and role-based access.

Filter Groups

Article • 4/29/2023 • 6 min read

Filter Group Types

The Filter Group Types can be used to distinguish different types of filter groups.

1. Select the Search icon , enter **Filter Group Types**, and then choose the related link.
   The **Filter Group Types** page opens.
2. In the **Code** field, enter a desired value.
3. In the **Description** field, enter a description.

The Filter Group Types are now set up.

Filter Groups

The Filter Groups extension enables multiple filters to be set on tables in Business Central and allows these filter settings to be saved and reused, for example, when using the Status Management extension.

It is possible to set up multiple filters on the field numbers linked to the selected table number in the filter group header. These filter settings will be applied when the filter group is selected, for example, in a status management flow.

1. Select the Search icon , enter **Filter Groups**, and then choose the related link.
   The **Filter Groups** page opens.
2. In the **Code** field, enter a value to identify the filter group.
3. In the **Description** field, enter a description.
4. In the **Type** field, select a required value from the lookup table.
5. In the **Table No.** field, select a required value from the lookup table. The **Table No.** specifies the number of the table to which the filter group applies.
   The filter group can contain filters on the fields that are present in the earlier selected table. These filters will be applied when the filter group is used.
6. On the **Lines** FastTab, in the **Field No.** field, select a value from the lookup table.
7. Select any row to select the number of the field to which the filter applies.

8. Select the **OK** button.
   Depending on the field that was selected, the filter can be filled manually or in this case, selected as an option. For fields that hold data, setup date or business data, you can set filters both by selecting data and by typing filter values, and you can use symbols to define advanced filter criteria. For fields of type option, however, you can only set a filter by selecting one or more options from a dropdown.
9. In the **Filter** field, select a value from the lookup table.
10. Select any row to select the type of filter that applies to the field.
11. Select the **OK** button.

The Filter Group is now set up.

Introduction

Article • 4/29/2023 • 1 min read

On the home page of Dynamics 365 Business Central, cues are visible that can serve as shortcuts. With the help of cues, you can find data easily, and potentially use this data to schedule tasks.

Using the **Cue Definitions** page, you can create up to 20 cues for each profile and customize these according to your requirements. You can also use the Dynamics 365 Business Central cue conditions to customize the cue colors based on the threshold values.

This feature lets you control how the home page appears for different profiles and provides you with the flexibility to display different cues on each profile based on the requirements.

Create Cue for a profile

Article • 4/3/2023 • 3 min read

Prerequisites

- A **Filter Group** exists with the fields **Code**, **Description**, and **Table No.** filled in.
- The Filter Group contains lines with the fields Field No. and Filter filled in.

To create a Cue

1. Select the Search icon , enter the text Cue Definitions, and then choose the relevant link.
   The Cue Definitions page opens.
2. Select **New**.
3. In the Profile ID field, choose the profile ID for which you want the cue to be visible.
   Add a new row for each profile. Leave the **Profile ID** field blank to show the cue on every profile available on the **Profiles (Roles)** page.
4. In the Cue ID field, enter a number. Based on this entered number, the cues will be positioned on the role center. The **Cue ID** values need not be entered in a sequential order. For each **Profile ID**, you can enter up to 20 Cue IDs and additional 20 Cue IDs wherein you keep the **Profile ID** field empty.
5. In the Caption field, enter a name that describes the cue briefly.
6. In the Filter Group Code list, select the code from the Filter Groups page to link with the Cue definition. To learn more about the Filter Groups, see here.
7. In the **Drilldown Page ID** field, select the page that should open when you select the cue on the role center.

Note

- If you leave the Drilldown Page ID field blank, the Table No. value that is already entered on the Filter Group Card page is taken as the Drilldown Page ID.
- If the ID value entered does not match with the Table No. value entered in the **Filter Group Card** page, and you select the cue tile, a message appears stating the following: “The table IDs do not match”.

Set up a color indicator on Cues

Article • 4/29/2023 • 3 min read

You can set up color indicators for the cues that change color conditions based on the data values on the cues, which will appear on the Role Center page of the each profile. The indicator appears as a colored bar along the top border of the cue tile.

It provides a visual signal of the status of the cue's activity, which can indicate some conditions to prompt the user to take action.

For example, if a cue displays Sales Orders, you can set up the indicator to appear green (favorable) when total number of Sales Orders is below 10, and appears red (unfavorable) when the total is greater than 20.

You have to specify up to two threshold values that define three ranges of data values (low, middle, and high) to which you can apply a different color (or style).

To set up a color indicator on Cues

1. Select the Search icon , enter the text Cue Definitions, and then choose the relevant link.
   The Cue Definitions page opens.
2. Select New to set up color indicators for a new cue.
3. Fill in the following fields to create a cue for a profile as described in the previous section.
   a. Profile ID
   b. Cue ID
   c. Caption
   d. Filter Group Code
   e. Drilldown Page ID
4. In the Low Range Style dropdown list, select an option for indicating the condition when the Cue value is below the Threshold 1 value.
5. In the Threshold 1 field, enter a number.
6. In the **Middle Range Style** dropdown list, select an option for indicating the condition when the cue value is equal to or greater than the **Threshold 1** value but less than or equal to the **Threshold 2** value.
7. In the Threshold 2 field, enter a number greater than the value of Threshold 1.
8. In the **High Range Style** dropdown list, select an option for indicating the condition when the cue value is greater than the **Threshold 2** value.

Depending on the cue values and the threshold values, the corresponding colors are visible on the cue tiles.

For the **Low Range Style**, **Middle Range Style**, and **High Range Style** fields, the following table lists the colors that correspond to the options available.

Option	Color
None	No color (Same color as the cue tile).
Favorable	Green
Unfavorable	Red
Ambiguous	Yellow
Subordinate	Grey