

User Manual

Aptean Food and Beverage ERP

Status Management

Product Documentation



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Release notes

Article • 7/22/2026 • 1 min read

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

Date	Release version	Description
July 2026	2602.0.0.0	Major release
March 2026	2601.2.0.0	Stability release
February 2026	2601.1.0.0	Stability release
January 2026	2601.0.0.0	Feature release
November 2025	2502.2.0.0	Stability release
October 2025	2502.1.0.0	Stability release
August 2025	2502.0.0.0	Feature release
May 2025	2501.0.0.0	Feature release
April 2025	2401.6.0.0	Stability release
November 2024	2401.5.0.0	Platform release
November 2024	2401.4.0.0	Platform release
September 2024	2401.3.0.0	Stability release
July 2024	2401.2.0.0	Stability release
June 2024	2401.1.0.0	Stability release
April 2024	2401.0.0.0	Feature release
March 2024	2301.3.0.0	Stability release
November 2023	2301.2.0.0	Stability release
November 2023	2301.1.0.0	Stability release
July 2023	1.6.107833.0	Stability release
March 2023	1.5.87869.0	Stability release

October 2022	1.4.63075.0	Feature release
May 2022	1.3.48218.0	Stability release
January 2022	1.2.41743.0	Stability release



2602.0.0.0

Release Note • 7/22/2026 • 1 min read

Features

The Aptean Status Management extension lets businesses track a record's progress through custom status stages (e.g., New, Firm, Released) and restrict actions based on the current status.

- With the features added in this release, the extension introduces integration events that let integrated extensions participate in the Status Management lifecycle — for example, allowing the Aptean EDI extension to synchronize Status Management information when reopening status-managed documents, without changing existing Status Management functionality. To know more, see [What's new in Aptean EDI, version 2603.0.0.0](#).

Resolved issues

The following issue has been resolved in this release.

ID	Description
383440	The system fails to update the Status Description field on production order pages when you change to a Status Management status that maps to the same production order status (for example, <i>Released</i>) as the current status.



2601.2.0.0

Release Note • 3/25/2026 • 1 min read

Enhancements/Modifications

With this release of the Aptean Status Management extension, the translation files for the following languages have been updated with standard texts for better readability.

- Danish (da-DK)
- Swedish (sv-SE)



2601.1.0.0

Release Note • 2/25/2026 • 1 min read

Enhancements/Modifications

With this release of the Aptean Status Management extension, the system supports the character limit up to 2048 from 250 in the **Endpoint Alerts** field on the **Status Management Setup** page, enabling you to configure more comprehensive alert endpoint URLs. This enhancement addresses the issue reported in bug ID #355211.

Resolved issues

The following issues have been resolved in this release.

ID	Description ID
351705	The system becomes unresponsive during the workflow approval process for credit limit changes on the Customer Card page when two approvers are configured at the same sequence level.
355211	The system does not allow to enter more than 250 characters in the Endpoint Alerts field on the Status Management Setup page.
355212	The system incorrectly retains the Filter Group and Status Management Codes field values on the Item Card page when executing the Copy Item action.



2601.0.0.0

Release Note • 1/28/2026 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean Formulation Management extension. To know more, see [Highlights of Formulation Management, version 2601.0.0.0](#).



2502.2.0.0

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

Enhancements/Modifications

With this release of the Aptean Status Management extension, the translation file for the Danish (da-DK) language has been updated with standard texts for better readability.

Resolved issues

The following issue has been resolved in this release.

ID	Description
338651	The system fails to save the current Status field value on the eSignature Entries page.



2502.1.0.0

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

Resolved issues

The following issue has been resolved in this release.

ID	Description
308178	A performance issue occurs on the Sales Order page when updating the Ship-to Code and Bill-to Customer No. fields values.



2502.0.0.0

Release Note • 8/27/2025 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Apteian eSignature extension. To know more, see [Highlights of eSignature, version 2501.0.0.0](#).

Integrations

The Apteian Status Management extension has been integrated with the Apteian [eSignature](#) extension. For more information, see [Integrations](#).



2501.0.0.0

Release Note • 5/21/2025 • 1 min read

Features

With the feature added in this release of the Aptean Status Management extension, the system supports enhanced status control and configuration for production orders. For more information, see [Maintaining status management flows](#) and [Process status management flow](#).

UI/UX changes

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

- The **Change Status Mgmt Status** action has been added to the following pages:
 - Simulated Production Orders
 - Planned Production Orders
 - Firm Planned Prod. Orders
 - Released Production Orders
- The **Status Description** and **Filter Group** fields have been added to the following pages:
 - Simulated Production Orders
 - Planned Production Orders
 - Firm Planned Prod. Orders
 - Released Production Orders
 - Finished Production Orders
- The *Production Order* option has been added to the **Table Name** field on the **Status Management Flows** page.



2401.6.0.0

Release Note • 4/30/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
282595	An error occurs when attempting to issue the trade statement on the Issue Trade Statements page after generating it.



2401.5.0.0

Release Note • 11/1/2024 • 1 min read

Enhancements/Modifications

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



2401.4.0.0

Release Note • 11/1/2024 • 1 min read

Enhancements/Modifications

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



2401.3.0.0

Release Note • 9/20/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Status Management 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.
- Enhancements have been made to update the process within the application to handle the *User Group* and *User Group Permission Set* tables. This change ensures compatibility with current and future versions of Business Central, even when the *User Group* and *User Group Permission Set* tables are deprecated.

! Note

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



2401.2.0.0

Release Note • 7/25/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
213189	A delay occurs in opening the Select Entries page upon executing the Select Entries action on the Item Tracking Lines page associated with a transfer order.



2401.1.0.0

Release Note • 6/10/2024 • 1 min read

Enhancements/Modifications

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



2401.0.0.0

Release Note • 4/17/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Status Management extension, the status management alerts can seamlessly synchronize within the application while adhering to technical requirements by transitioning from **Azure Service Bus** to **HTTP Endpoint**.

UI/UX changes

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

- The **Authentication Type**, **Username**, and **Password** fields are added to the **Status Management Setup** page.
- The **Azure Service Bus URL**, **Topic**, **Time to Live**, and **Number of Retries** fields are removed from the **Status Management Setup** page.



2301.3.0.0

Release Note • 3/7/2024 • 1 min read

Enhancements/Modifications

Curated certain captions and tooltips to remove erroneous spellings and enhance the readability in French version (fr-FR).



2301.2.0.0

Release Note • 11/29/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
154268	Performance issues occur when attempting to fetch the Status Description field value on the following pages: • Customer Card • Customers list • Vendor Card • Vendors list • Item Card • Items list • Purchase and Sales documents



2301.1.0.0

Release Note • 11/1/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
154639	On the Sales Order page, the response time is longer to turn off the Customer Credit Limit is Exceeded toggle even when the Credit Amount field value on the selected Customer Card is empty.



1.6.107833.0

Release Note • 7/10/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
131147	When the AssistEdit button is selected in the Table No. field of the Status Management Flow page, table values are not displayed on the Status Management Table Selection page.



1.5.87869.0

Release Note • 4/3/2023 • 1 min read

Resolved issues

The following issues have been resolved in this release:

ID	Description
89199	Unable to create Sales Orders from Blanket Sales Orders.
98101	The newly created tables were not reflected in the Status Management Table .



1.4.63075.0

Release Note • 4/3/2023 • 1 min read

Enhancements/Modifications

The enhancements in this release are listed below:

- Added tables to set up Status Management Flow (SMF) for Routings, Routings Version, Vendor Records and Lot No. Information Card.
- Added Customer Credit Limit & Customer Overdue Balance fields to Sales Header table to control the Status Management Flow (SMF).
- Minor technical changes were made to keep our apps in line with the *updated* coding guidelines for Business Central.



1.3.48218.0

Release Note • 4/3/2023 • 1 min read

Enhancements/Modifications

The enhancements in this release are listed below:

- A localized version of Status Management 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 the *updated* coding guidelines for Business Central.



1.2.41743.0

Release Note • 4/29/2023 • 1 min read

Resolved issues

The following issues have been resolved in this release:

ID	Description
36248	The Item No. field on the Item Card page cannot be modified when the Status Management extension is active.
34343	Two instances of the Item Template page are opened when creating a new item.
36249	Unable to change the status on existing records without modifying the record when Status Management is active.



Introduction

Article • 5/21/2025 • 3 min read

Though many entities in Microsoft Dynamics 365 Business Central are equipped with status fields, in many cases these provide insufficient support for complex business processes. Let's take the sales order as an example: the order is equipped with the status *Open* or *Released*. In many cases, a workflow between multiple roles exist in getting the order from *Open* status to *Released* status. A check on the customers' credibility, a check on the presence of documentation required to export the goods sold, or the check to see if production capacity exists to fulfill the order, are a few examples of intermediate stages of a sales document, before being 'released' for logistical shipment.

The same applies to important master data records such as Customers, Vendors, Items, Purchase Orders, Production Orders, Lot Nos., and Routings. As master data setup greatly influences how you can use Dynamics 365 Business Central, making sure that new customers are set up correctly before they are used in transactions is of vital importance. It is common that multiple people or roles are involved before new master data are approved for use in transactions.

The difficulty with supporting these intermediate stages of the transaction and/or master data approval is that they can differ substantially between (sub)industries, companies, or even sets of records (e.g. a different workflow applies to approve a purchase item versus a production item). Coming up with best practices and applying them by default is therefore rarely successful. The Aptean Status Management (STM) extension allows flexible definition of various statuses that subsets of business central entities can be in before being released for general use throughout the system. Per record type supported (Customer, Vendor, Item, Sales Header, Purchase Header, Production Order, Lot No. Information, Routing Header, Production BOM, Production BOM version, and Routing Version), subsets can be defined in the form of filter groups (e.g. Purchase items versus Production items or Sales headers of type Order versus type Quote) after which multiple stages can be defined per subset.

Furthermore, per status, you can set up the mandatory fields and the fields that should be locked from previous statuses for further editing. A link with Dynamics 365 Business Central permission sets exists, making it possible to define what users are allowed to promote the record to the next status.

Besides the possibility to assign statuses to the Dynamics 365 Business Central entities defined, functionality in the form of status management alerts, status management logging and a notification system allows the design of fully customized workflows to support the introduction of new master data or the correct handling of purchase – and sales transactions.



Setup

Article • 11/6/2024 • 1 min read

The following setups are required.

- [Manage permission sets](#)
- [Set up status management](#)



Manage permission sets

Article • 11/6/2024 • 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 *STATUSMANAGEMENTFDW*.

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 *STATUSMGTBASICFDW*.

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.



Status Management

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



Set up status management

Article • 2/25/2026 • 5 min read

Alerts

The status management setup must be completed before working with alerts within the Aptean Status Management extension.

Multiple alerts can be created while using the Aptean Status Management extension. These alerts can be used, for example, to send an email via Microsoft Automate or trigger another process in an external system (using HTTP endpoints).

You can configure the URL using the Power Automate's HTTP Request trigger to seamlessly integrate it with the Aptean Status Management extension. Upon completion of this configuration, Business Central will promptly activate the corresponding Power Automate flow whenever an alert is detected. This flow offers flexibility, allowing notifications to be dispatched through various channels.

Additionally, you can enhance navigation efficiency by adding system IDs to URLs, facilitating quick access to customer records, item records, production BOM records, sales headers and purchase headers within the system.

Whenever a status management status code is changed via **Change Mgmt Status** function , the system creates a so-called status management log. Important to notice is that this log record is only created if the standard Microsoft Dynamics 365 Business Central Change log is activated and for the corresponding table (e.g. Purchase header) changes are logged when inserting, modifying, or deleting all, or some fields.

1. Select the Search icon , enter **Status Management Setup** and then choose the related link.

The **Status Management Setup** page opens.

2. Turn on the **Alerts** toggle .

3. Enter **Endpoint Alerts**.

This specifies the URL for the HTTP endpoints to which the status management alerts will be posted. The system supports the character limit up to 2048.

4. In the **Authentication Type** field, select the type of authentication to verify the users from the following options.

- *Basic* - Requires users to provide a username and password for access.
- *Anonymous* - Users can interact with the endpoint to manage alerts without needing authentication credentials such as a username or password.

5. Enter the user credentials in the **Username** and **Password** fields only when the **Authentication Type** is set as *Basic*.

The setup for status management alerts is completed.



Change log

In order to track the change of the status management status (e.g. of a customer), the standard Dynamics 365 Business Central change log needs to be activated.

1. Select the Search icon , enter **Change Log Setup** and then choose the related link.
The **Change Log Setup** page opens.
2. Turn on the **Change Log Activated** toggle.
3. On the action bar, select **Setup > Tables** to open the **Change Log Setup (Table) List** page.
4. Select the **Customer** cell in the **Name** field.
5. In the **Log Insertion** field and choose an option from the field: *Some Fields* or *All Fields*.
6. In the **Log Modification** field and choose an option from the list: *Some Fields* or *All Fields*.
7. In the **Log Deletion** field and choose an option from the list: *Some Fields* or *All Fields*.
8. Select **Close**.

The change log is now activated for the customer table.



Status management flows

Article • 4/29/2023 • 11 min read

In this topic, all the features and functionality of Status Management Flows are explained in the context of introducing a new customer record. The same functionality also applies when introducing Status Management Flows for Items, Production BOMs, Production BOM versions, Purchase headers, Production Orders and Sales headers.

To prepare a status workflow with multiple steps, a Status Management Flow must be created for a specific table. In the following steps, a Status Management Flow is created for the customer table.

Because a status management flow can differ substantially when setting up domestic or foreign customers, multiple flows are created for the customer table.

1. Select the Search icon , enter **Status Management Flows** and then choose the related link.
The **Status Management Flows** page opens.
2. On the action bar, select **New**.
3. Select the AssistEdit button  in the **Table No** field.
4. Select the required **Table No**.
Select the **Table No. 18** with **Table Name** Customer. This specifies the table to which the status management flow is applied.
5. Select **OK**.

Filter groups

Next, the filter group *CUST-DOM* is selected. The filters that are set up on this specific filter group define what customers fall within the group and are assigned this specific Status Management Flow.

1. In the **Filter Group Code** field, select the required code from the drop-down menu.

When setting up multiple Status Management Flows for the same record type, multiple Filter groups are to be used. For reference, see the [Filter Groups](#) user guide. To ensure that the correct flow is assigned to the correct records, the filters set in these filter groups should be mutually exclusive and jointly cover the whole set of customers.

In this example, the Status Management Flow for customers is divided into 2 filter groups:

- CUST-DOM, for domestic customers, with filters Country code = US
- CUST-FOR, for foreign customers, with filters Country code <> US

The use of these filters meets the criteria that they cover the whole customer base and it is not possible that 1 customer is in both groups. These rules should be taken into consideration when designing new Status Management Flows.



Statuses

After setting up the status management status flow header, multiple statuses can be defined. These statuses will be assigned to the records as it moves through the workflow. They represent the various phases the record can be in. A status management flow for the creation of a new customer card will most likely move through phases such as new, commercial check, finance check, released, and blocked.

A notification is given to inform the user that an initial status is automatically inserted.

On the **Status Management Flow** page, on the **Lines** FastTab, the Status with an empty **Code** and **Description** *New Customer* is inserted automatically when the Status Management Flow header is created. As this is the initial status that a new customer record will be assigned, it should not be deleted.

Renaming the **Description** with a value other than *New Customer* is possible. However, while changing the Status of the status management flow to *Certified*, checks are in place to ensure if a status exists where an empty **Code** field and the **Sorting** field '0'.

1. On the **Status Management Flow** page, on the **Lines** FastTab, enter **Code**.
2. Enter **Description**. As in most workflows, these phases are assigned chronologically a sorting order can be defined that indicates which statuses successive to each other.
3. Enter **Sorting Order No**. By indicating that a Status Management Status Code is mandatory, it cannot be skipped by users involved in the execution of the specific Status Management Flow.
4. Select the **Mandatory** checkbox. If the status management status is mandatory, the user cannot change the status management status in a record to a status with a higher sorting order no. without having set this status first.
5. In the **Blocked Value on Record** field, select *All* from the drop-down menu.

The **Blocked value on Record** field indicates the link between the user-defined Status Management Status Code and the already existing Dynamics 365 Business Central status on the record type. In this case, changing a customer record from *Finance* to *Released* will cause the standard Blocked field on the customer card to change from *All* to *None*.

Permission role ID

Permission Role IDs per Status Management Status Code are used to determine the users with specific permission sets that are allowed to change the customer record to a specific Status Management Status Code.

Only users with the *FINANCE* permission ID can change the **Status Management Status Code** field value to *Released* on the **Customer Card** page.

1. On the **Status Management Flow** page, on the **Lines** FastTab, in the **Permission Role ID** field, select the required option from the drop-down menu.



Status Management

It specifies who has permission to set this status management status on a record. When unspecified, everyone is allowed to do so.

2. Select the required **Role ID**.

Email

Per Status Management Status Code, it can be decided in the **Notify by Email** field what email addresses need to be notified when a record changes to the specific Status Management Status Code. Multiple addresses can be set up.

When a customer status is changed to *FINANCE*, the system creates an alert and sends it to the following email addresses, finance@company.com and person@company.com.

On the **Status Management Flow** page, on the **Lines** FastTab, in the **Notify by Email** field, enter the related email address.

Repeat all the steps mentioned above for the required statuses.

Mandatory fields

Usually, different roles are responsible for different fields on a master data card or on an order document. To ensure efficient execution of the Status Management Flow, it is of vital importance that specific fields are filled out while moving to a specific status.

1. On the **Status Management Flow** page, on the action bar, select **Mandatory Fields**.
2. In the **Field. No** field, select the required **No.** from the AssistEdit button
3. Select **OK**.
4. Select the status checkbox (for example **Credit check**) for which the field is mandatory.

Locked fields

To further ensure the reliability of master data it is possible to lock fields for editing when already assigned/approved in a previous status of the Status Management Flow.

1. On the **Status Management Flow** page, on the action bar, select **Locked Fields**.
2. In the **Field. No** field, select the required **No.** from the AssistEdit button
3. Select **OK**.
4. Select the status (for example **Released Customer**) for which the field is mandatory.



Flow status

When changing the status of the flow to *Released*, multiple checks are executed to ensure that the Status Management Flow is according to the required specifications.

Only Status Management Flows that are set to *Certified* are used to apply to records in the system. Whenever a Status Management Flow is set to *Certified*, it is not possible to change its characteristics (such as adding mandatory fields).

Before the Flow Status can be changed to *Certified*, the Priority must be filled.

1. On the **Status Management Flow** page, on the **General** FastTab, enter the priority of the status management flow in the **Priority** field.
The priority of the status management flow determines the precedence. Among all flows that are valid per table, only one flow with the lowest priority number can be executed per record. E.g., if two flows exist on the table *Vendors*, one with the custom filter-group *Domestic* and priority *1* and one with filter group *Vegetables* and priority *2*, and both filter groups are valid for a specific vendor, then only the first flow will be applied.
2. In the **Flow Status** field, select *Certified* from the drop-down menu..

The Status Management Flow is now set up completely.



Process status management flow

Article • 5/21/2025 • 6 min read

To demonstrate how the Status Management Flow is applied, we create a new Customer Card and the same applies for supported tables. In this example, customers that are of type *Domestic* need to undergo a VAT check and for customers that are of type *Foreign*, an additional check at the Customs office is required to see if all documentations are available to export the goods sold to the customers' location.

1. Select the Search icon , enter **Customers**, and then choose the related link.
The **Customers** page opens.
2. On the action bar, select **New**.

Assignment of status management Flow

When a new customer record is created, initially is insufficient information to assign the record to one of the filter groups. Hence the Status Management Filter Group, and Status Management **Status Description** remain empty.

1. On the **Customer Card** page, on the **General** FastTab, enter the **Name**.
Every time a field is entered or changed, the system will check if it applies to any of the Status Management Filter Groups.
The **Filter Group** has now changed to *CUST-FOR* due to the corresponding filter group with Country/Region Code <> US.
2. In the **Country/Region Code** field, select the required code from the drop-down menu.
After filling out the field Country = USA, the system automatically detects the record is aligned with the filters of Filter Group CUST-DOM and applies this Status Management Flow to the Customer Card.
The Filter Group has now changed to CUST-FOR due to the corresponding filter group with Country/Region Code = US.
Also, the Status Management Status Description is filled with the initial status *New Customer* (the line with sorting 0) of the record.
In case multiple Status Management Flows apply, the Status management flow with the highest priority (meaning the lowest number) is applied.

Change status management status

Now the customer card can be promoted to the next Status by **Assign Status Mgmt Status** function.

On the **Customer Card** page, on the action bar, select **Actions > Functions > Change Status Mgmt Status**.

The dropdown opens with all statuses as defined in Status Management Flow CUST-DOM in order of their sorting number. In some cases, statuses are depicted in red. This can have multiple reasons:



The status is preceded by another Status set to Mandatory.

The user initiating the function does not have the Permission Role ID required to move to the next Status.

Mandatory fields

In this case, when you try to change to *Credit Check*. The system checks if all mandatory fields are filled out to move to this stage.

1. Select the required option.
2. Select **OK**.

An error message is produced indicating what additional fields should be filled out.

After filling out the mandatory fields **Address** and **VAT Registration No.**, the customer can be promoted to status *Credit Check*.

Locked fields

In the Status Management Flow that we designed, the financial department must finally check the customer card and see if all important fields are filled out. Only after that can the Customer Card can be released for general use.

An employee from the finance department fills out the required fields for this step:

- Credit limit
- Posting groups, etc.

Because the fields **Name** and **Address** that were registered in the previous Status, are set up as a locked field for the Status *Finance approved*, it is no longer possible to change their value.

On the **Customer Card** page, on the **General** FastTab, enter **Name**.

An error is shown since this field is set up as a locked field when the customer has the status *Finance approved*.

To ensure that only specific people are allowed to assign Statuses such as Released, it is advisable to set up a few specific Permission Role IDs for approving master data and or transactions and assign them only to authorized users.

After registering all the required fields, it is possible to change the status of the customer card to *Released*. Only users that have the Permission Role ID setup on Status Management Status *Released* are allowed to assign this Status.

Based on the **Blocked** field value on the record linked to Status Management Status Code *RELEASED*, the Block field is changed to empty, allowing the use of the customer card in sales transactions.



Status management alerts

Based on the checkmark Alerts in the Status Management Setup, a Status Management alert is created every time a Status Management Status is changed. The Status Management Alerts can be found using the tell me-function.

1. Select the Search icon , enter **Status Management Alerts**, and then choose the related link.
The **Status Management Alerts** page opens.
2. Select **Back**.



Status management alerts and logs

Article • 4/29/2023 • 6 min read

Based on the Alerts toggle on the Status Management Setup page, a status management alert is created every time a Status Management Status is changed. The status management alerts can be found using the tell me-function.

1. Select the Search icon , enter **Status Management Alerts**, and then choose the related link.

The **Status Management Alerts** page opens.

The following fields are available in the Alert:

Field	Description
Source Table No.	Specifies the number of the table in which the status management status was changed and that resulted in this alert.
Primary Key Field 1 Value	Specifies the value of the first primary key for the status management alert.
Previous Status Management Status Code	Specifies the previous status management code that was applied to the record.
New Status Management Status Code	Specifies the new status management code that was applied to the record.
Creation Date and Time	Specifies the date and time when this status management alert was created
User ID	Specifies the ID of the user who was responsible for changing the status management code that resulted in this alert.
Permission Role ID	Specifies the permission role ID that is linked to the new status management code. Only a user with this permission role ID could have set this status.
Send Status	Specifies the status of this line when using an Azure service bus.
Result	Specifies the result text when the send status is Failed.

The alerts are synchronized using Azure Service Bus and can be shared with a wide variety of third-party software and/or notification tools such as Power Automate. The intention is to notify users responsible for the next step in the Status Management Flow. For this purpose, the email addresses set up in the **Notify by email** field for the New Status Management Status are included in the JSON file used for communication. These can be picked up in e.g., Power Automate to be used in notifications.



Status management log

Based on activation of the Dynamics 365 Business Central Change Log for the tables Customer, Item, Production BOM, Production BOM Version, Purchase Header, and Sales Header, the system will create a Status Management Change Log every time a Status Management Status is changed.

From the card page (here: the customer card) the change log can be opened.

1. Select the Search icon , enter **Customers** and then choose the related link.
2. Select the required **No.** to open the **Customer Card** page.
3. On the action bar, select **Related** > **Customer** > **Status Management Log**.

The following information is presented in the **Status Management Log** page:

Field	Description
Previous Status Management Status Code	Specifies the previous status management code that was applied to the record.
New Status Management Status Code	Specifies the new status management code that is applied to the record.
Date and Time	Specifies the date and time that the status management code changed.
Time	Specifies the time that the status management code changed.
User ID	Specifies the ID of the user who was responsible for changing the status management code.

All changes that were made in between the Previous and New Status Management Status Code selected on the above-mentioned fields are seen in the **Change Log Entries** FastTab of the **Status Management Log** page.

Field	Description
Date and Time	Specifies the date and time when this change log entry was created.
Time	Specifies the time when this change log entry was created.
User ID	Specifies the ID of the user who was responsible for this change.
Field Caption	Specifies the field caption of the changed field.



Old Value	Specifies the value that the field had before a user made changes to the field.
New Value	Specifies the value that the field had after a user made changes to the field.
Type of Change	Specifies the type of change made to the field.



Function auto-set status

Article • 4/29/2023 • 3 min read

In some cases, you might want a status to be assigned automatically to a record. In these cases, it is possible to define a Auto-set status for a specific Status Management Flow.

1. Select the Search icon , enter **Status Management Flows** and then choose the related link.

The **Status Management Flows** page opens.

When you add a new customer, it starts with the status *New* by default in the workflow. After you fill in the customer's name and address details on the respective **Customer Card** page, the status automatically gets updated to *SALES* in the Status Management system.

2. Select the required **Table No.** to open the **Status Management Flow** page.

A new Auto-Set Status line can only be added when the Status Management Flow Status isn't *Certified*.

3. On the action bar, select **Related >Auto-Set Status Setup**.

A filter group has been set up for customers that have a name and full address information setup. The filter group is named *CUST-ADDRESS*, representing customers that have the fields **Name**, **Address**, **Country/Region Code**, and **Postal Code** set to a value other than empty.

4. In the **Filter Group Code** field, select the required code from the drop-down menu.

From the Status Management Flow, the Auto-set status can be defined by selecting the created Filter Group and selecting Status Management Status Code, *SALES*.

5. In the Status Management Status **Code** field, select the required code from the drop-down menu.

6. In the **Priority** field, enter the priority of the auto-set status line.

This specifies the priority of the auto-set status line. When a record meets the filter group criteria of multiple lines, the status management status will be changed to the status that is specified for the line with the highest priority (lowest number).

The Auto-Set Status Setup is now completed.

Now, when a customer card is created with all the required fields filled out,the system automatically assigns the Status Management Status Code as *SALES*.



Maintaining status management flows

Article • 5/21/2025 • 9 min read

Often, workflows that exist around introducing master data or managing purchase- or sales transactions may change over time. In general, Status Management Flows are created initially, but altered frequently afterward to cater for specific business needs:

Target groups for specific flows may change:

- Additional steps or statuses may be introduced within a specific Status Management Flow.
- Mandatory fields for a specific status may change.
- Status Management Flows may be phased out or replaced by others.

In all these cases, you want the old Status Management Flow to be replaced by the new SMF with as little disturbance of business as possible. This means that whenever a new record is created, the new Status Management Flows are picked up, and the existing records are reassigned to the new Status Management Flows.

Suppose that in the initial setup, one simple status management Flow existed for all customers. A Filter Group *CUST-ALL* was set up and linked to the Status Management Flow. All customers would pass the same set of statuses:

As time progressed, it was decided that for domestic customers and foreign customers a different set of Statuses and accompanying mandatory fields should be implemented:

- For new domestic customers, an additional step **Request Insurance** needs to be in place.
- For new foreign customers, an additional step **Request Export Documentation** needs to be in place.

Step 1: Define new filter groups

Besides the existing filter group *CUST-ALL*, two additional Filter Groups are needed representing domestic and foreign customers:

- *CUST-DOM* for domestic customers, with filters Country code = US
- *CUST FOR* for foreign customers, with filters Country code <> US

Step 2: Setup new status management flows using copy lines function

Two new Status Management Flows are created using Filter Groups *CUST-DOM* and *CUST-FOR*.

The status management flow with Filter Group *CUST-DOM* is given priority 1 and status management flow with Filter Group *CUST-FOR* is given priority 2. The priority of the already existing *CUST-ALL* status management flow is



set to 3. In case a customer record has fields that match multiple filter groups, the status management flow with the filter group that has the highest priority is assigned to the record.

After creating the status management flow header, the **Copy Lines** function is used to quickly create Status Management Status Codes for the new Status Management Flows based on the existing *CUST-ALL* flow.

1. On the **Status Management Flow** page, on the action bar, select **Actions** > **Copy Lines**.
2. In the **From Filter Group** filter, select the required option from the AssistEdit button .
The **From Filter Group** field specifies from which status management flow (table-filter group combination) the lines should be copied.
The **To Filter Group** field specifies to which status management flow (table-filter group combination) the lines should be copied.
3. Select **OK**

The Status Codes, including Mandatory and Locked Fields, Permission ID, and Mandatory steps are copied.

For the newly created Status Management Flow *CUST-DOM* an additional Status Management Status *Request Insurance* is added with its own **Permission Role ID**, and **Notify by email**.

For the newly created Status Management Flow *CUST-FOR* an additional Status Management Status *Request Export docs* is added with its own **Permission Role ID**, and **Notify by email**.

After the changes are complete, the Flow Status of both Status Management flows is set to Certified. This indicates that they can be used for new customers. Now, whenever a customer is created with Country set to US, the system will automatically apply the *CUST-DOM* Status Management Flow.

Step 3: Apply the new status management flows to existing records using reassign flows function

Besides implementing the Status Management Flow for new customers, it is also a good practice to apply the new Flows to existing records. In our example, all customer cards are currently still equipped with Status Management Flow *CUST-ALL*. For customers still in their approval process, it is necessary to reassign the Status Management Flow to either *CUST-DOM* or *CUST-FOR*.

As we will no longer be using the status management flow *CUST-ALL*, it's Flow Status is set to *Closed*.

Next, the function Reassign Flows are executed from the overview of Status Management Flows and the record type Customer is chosen.

1. On the **Status Management Flow** page, on the action bar, select **Actions** > **Reassign Flows**.
2. Select **OK**.

Each individual customer record is now evaluated based on the new filter groups or flows that have a Flow Status set to Certified.



For records that previously had a filter group different from the new filter group, the initial status *New Customer* is applied. For records that keep their Status Management Flow, the Status code is kept if it still exists.

Note

In many cases, the initial status *New Customer* will cause the Customer Card to be blocked in transactions. To prevent disturbance of business, the function should not be executed during working hours and all steps in this user guide should always be implemented.

Step 4: Update existing records with the correct (possibly new) status using batch update function

In this case, all customer records were changed from Status Management Flow *CUST-ALL* to either *CUST-DOM* or *CUST-FOR* with status *New Customer*.

Multiple records belonging to the same filter group can be updated simultaneously using the **Batch Update** function. When executing the function from Status Management Flow *CUST-DOM* a request page opens with the following options:

1. On the **Status Management Flow** page, on the action bar, click **Actions > Batch Update Status**.

When the **Set Auto Status** toggle is turned on, all records that are linked to the status management flow are re-evaluated and are each assigned the status that is applicable according to the setup on the page Auto-Set Status Setup.

Because no Auto set status has been set up, the function is run with the toggle off. We select Status Management code 'Being Edited' as we want this code to be assigned to all customers with Status Management Flow *CUST-DOM*.

The Status Management Code specifies what should be the new status management status for all records that are linked to the status management flow.

2. In the **Status Management Status Code** field, select the related option from the drop-down menu.
3. Select **OK**.
4. The **Status Management Description** specifies the description of the selected status management status.
5. The **Filter Group Code** specifies the filter group that is linked to the status management flow.
6. The **Filter** specifies which field filters should be applied when executing this function. Setting filters enables to update only the specific records that meet these criteria.

The toggle **Create Status Management Alerts** specifies if status management alerts should be created for each record of which the status will be changed after executing this action. When the functionality is set up to alert users when a record has changed to a specific status, this might result in a large number of alerts for users.



An additional filter is placed on Status Management Status Code = empty to ensure that only customers that are currently assigned this status are changed to new status *RELEASED*. In this case, you could prevent customers that were set to *BLOCKED*, for instance, to be wrongly changed to *RELEASED* in Batch.

7. Select **OK**. A dialog box opens displaying the following message: Status management statuses successfully updated.
8. Select **OK**.

Note

When the Batch Update Status function is executed, there are no checks on mandatory steps that may lay between the old and the new Status Management Status. If this is required, the **Change Status Mgmt Status** function from the **Customer Card** page should be executed per record.

The function Batch Update Status is repeated for Status management Flow *CUST-FOR*, thereby updating all customer records with a new status.

Update multiple existing records with status using change management status function

From the list pages that exist for the supported tables Customer, Item, Production BOM, Production BOM versions, Purchase Orders, Production Orders and Sales Orders it is possible to execute the function Change Mgmt Status action for multiple records simultaneously. This can be helpful when a large set of records must be updated.

When using this function, some rules apply:

- The selected records must all belong to the same Status Management Flow (have the same Filter Group).
- When changing from one Status Management Status to another, the mandatory Statuses in between may not be skipped. If the mandatory steps are skipped for one of the records within the selected set, the routine will stop updating at this specific record.
- All mandatory fields in between the old Status Management Status and the new must be filled. If mandatory fields are still empty for one of the records within the selected set, the routine will stop updating at this specific record.
- All the mandatory field values that are configured on the **Status Management Flow** page cannot be modified when changing from one status to another.
- Restrictions on Permission set ID are similar to that when the function is executed from the card page. Only users that have the Permission Set ID assigned in their user profile are allowed to change to the Status Management Status.
- On the **Customer Card** page, on the action bar, select **Actions > Functions > Change Status Mgmt Status**.
- Select the required option.



- Select **OK**.

Note

Upon executing this action, the system does not allow to change the status from *Simulated* to *Planned* as per the standard flow on the **Simulated Production Order** page. You must follow the standard flow order.



Integration existing dynamics 365 business central functionality with status management

Article • 11/28/2025 • 5 min read

The use of standard Business Central functionality may overlap with the functionality of the Status Management extension. As an example, the functionalities prepayments and approval entries impose specific business rules that impact if the status of a Purchase or Sales Order may be set to *Released*. Status Management does the same, thereby possibly overlapping or extending the standard functionality.

To provide a single and consistent workflow to the end-user, it is wise to take standard functionalities into consideration (if used) when designing or modifying Status Management Flows for Purchase or Sales Orders.

In the steps below, it is described how to achieve this for functionalities Prepayments and Approval request via workflows. Additional information on Prepayments and Approval Requests can be found on the Microsoft Dynamics 365 Business Central documentation.

Incorporate prepayment into status management flows

Assume that for a specific set of customers, prepayment is requested before Sales Orders may be set to *released*. This implies that multiple activities and roles are involved before a sales transaction may be released (create a Sales Order, create a Prepayment Invoice and match a customers' payment with the Prepayment Invoice, Release the Sales Order).

Before a Sales Order can be set to *Released*, the Status Management Status *Pending P* can be set. As prepayment is not required from all customers, the Status is optional (as opposed to the **Mandatory** toggle).

The Status *Pending P* is linked to the Sales Order status option 'Pending prepayment' referring to the status that is assigned automatically whenever a prepayment invoice is posted from the Sales Order.

When a Sales Order is created for a customer with prepayment, it is not possible to directly assign Status Management Status Released.

1. On the **Sales Order** page, on the action bar, select **Actions > Functions > Change Status Mgmt Status**.
2. Select the required **No**.
3. Select **OK**.

A dialog box opens with a message that says there are unposted prepayment amounts on the document.

4. Select **OK**.

The user is forced to comply with the business rule imposed by the Prepayment functionality and first creates and posts a prepayment invoice from the Sales Order. When this is done, the status of the sales order is changed to Pending Prepayment.

5. On the action bar, select **Actions > Posting > Prepayment > Post Prepayment Invoice**.

A dialog box opens asking if you want to post the prepayments?



6. Select **Yes**.

The Status of the Sales Order now changes to *Pending Prepayment*.

Now the Status Management Status Pending Prepayment can be assigned, as its setup matches the current status of the Sales Order. It is the user's responsibility to make sure the Status and the Status Management Status are aligned in this way:

7. On the action bar, select **Actions > Functions > Change Status Mgmt Status**.

8. Select the required option.

9. Select **OK**.

The **Status Description** now changes to *Pending Prepayment*.

Once the payment is received from the customer and matched by the finance department, the status of the Sales Order can be changed. By selecting Status Management Status *Released*, both the Status fields are updated simultaneously.

 Note

The status of the sales order must be manually updated by executing the **Change Status Mgmt Status** action, therefore it is not possible to use the code unit *383 Upd. Pending Prepmt. Sales* in combination with status management flows.

10. On the action bar, select **Actions > Functions > Change Status Mgmt Status**.

11. Select the required option.

12. Select **OK**.

The status changes to **Released**.

Incorporate approval into status management flows

Assume that the Standard Business Central workflow is activated that forces users to first send approval requests before being able to release a Purchase Order. This implies that multiple activities and roles are involved before a purchase transaction may be released (create a Purchase Order, send an approval request, approve or decline the request, release the Purchase Order). To support this way of working via the Status Management extension, the following Status Management Flow is designed:

Before a Purchase order can be set to released, the Status *Pending A* can be set. As in some cases, no approval is required (because the threshold value setup is not reached), the Status is optional (as opposed to the Mandatory toggle).

The Status *Pending A* is linked to the Purchase Order status option 'Pending Approval' referring to the status that is assigned automatically whenever an approval request is sent from the Purchase Order.

When a Purchase Order is created it is not possible to directly assign the Status Management Status 'Released' due to activation of a Workflow.



1. On the Purchase Order page, on the action bar, Select **Actions > Functions > Change Status Mgmt Status**.
2. Select the required option
3. Select **OK**.

A dialog box opens displaying the following message: This document can only be released when the approval process is complete.

4. Select **OK**.

The user is forced to comply with the business rule imposed by the Approval / Workflow functionality and first creates an approval request from the Purchase Order.

When this is done, the status of the Purchase Order is changed to Pending Approval.

5. On the action bar, select **Request Approval > Send Approval Request**.

The **Status** now changes to *Pending Approval*.

Now the Status Management Status *Pending A* can be assigned, as its setup matches the current Status of the Purchase Order. It is the user's responsibility to make sure the Status and the Status Management Status are aligned in a way that the status *Pending Approval* matches the correct Status Management Status.

6. On the action bar, click **Actions > Functions > Change Status Mgmt Status**.
7. Select the required option.
8. Select **OK**.

The Status Management **Status Description** now changes to *Pending Approval*.

Once the transaction has been approved, the status of the Purchase Order is changed automatically into *Released*.

Now the Status Management Status can be changed to *Released* as well. It is the users' responsibility to make sure the Status (Value on Record) for Pending Approval and Released are aligned with the Status Management Status.



Integrations

Article • 10/22/2025 • 1 min read

The Aptean Production Scenarios extension has been integrated with the following extensions:

- [Aptean eSignature](#)
- [Approved Suppliers](#)



Aptean eSignature

Article • 8/27/2025 • 1 min read

The Aptean Status Management extension must be installed to use the Aptean [eSignature](#) extension. The system requires digital signatures for status changes and workflow approvals.



Aptean Approved Suppliers

Article • 10/22/2025 • 1 min read

When the Aptean Status Management extension is used in conjunction with the Aptean [Approved Suppliers](#) extension, you can define, manage, and track the lifecycle of manufacturer approvals using custom status configurations. For more information, see [Integration with Aptean Status Management](#).

