

# DYNAMICS CUES

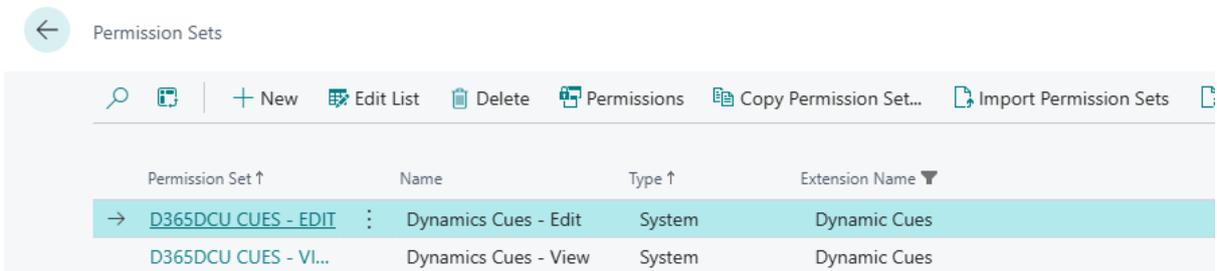
## Documentation for version: 26.3.37.0

Dynamics Cues allows users to create cues and panels for Business Central easily. These can be shown on various Role Centres and in a FactBox on various pages. The system can also be set up for a specific user if that user needs to see different panels to other users. Cues can be different sizes and colours and even have an image on them.

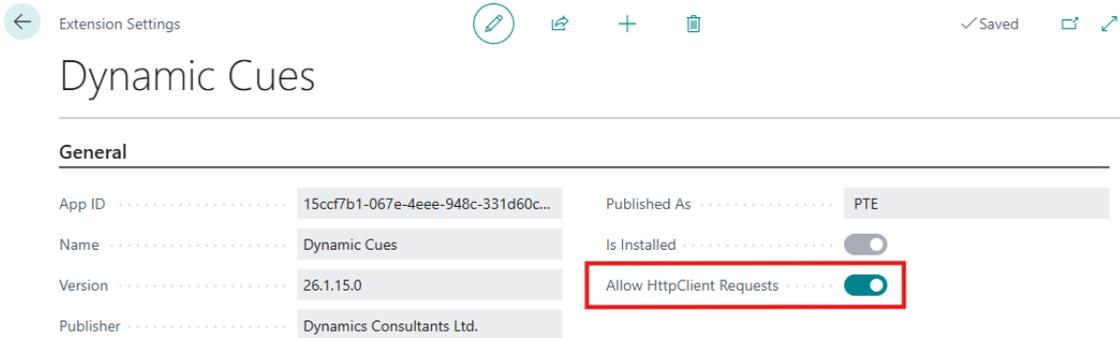


## 1. Setup

Dynamics Cues has two permission sets included with it. Dynamics Cues – Edit and Dynamics Cues – View. The Dynamics Cues – View permission is also added to the standard D365 Basic permission set which most users should already have been granted.



Please note that for cues to work, you need to turn on this setting in the Extension Management, Dynamics Cues app. This allows the app to modify the page directly. We do not make any external calls from this app (unless you create a URL cue and direct it to an external location).



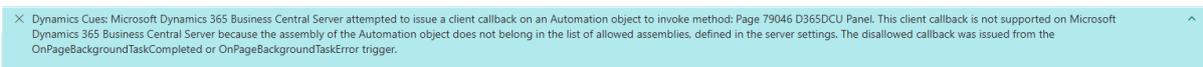
Extension Settings

Dynamic Cues

**General**

App ID	15ccf7b1-067e-4eee-948c-331d60c...	Published As	PTE
Name	Dynamic Cues	Is Installed	<input type="checkbox"/>
Version	26.1.15.0	Allow HttpClient Requests	<input checked="" type="checkbox"/>
Publisher	Dynamics Consultants Ltd.		

If you don't do this, you'll see an error message like the below at the top of your Role Centre.



## 2. Features

Dynamics Cues adds the following features to Business Central:

- Custom Cues can be created do the following:
  - Show information from any table.
  - Run individual reports.
  - Open URLs.
- Custom Panels can be created to hold cues in a user specified order. There is currently no limit for the number of cues on a panel but obviously too many will clutter the page. This is especially relevant on the FactBox panels as the more cues added to the Factbox will move subsequent FactBox down the page where they will not be visible without scrolling down.
- Up to 12 panels can be added to individual Role Centres, either for a specific user or in general for all users.
- Up to 4 panels can be added to the Dynamics FactBox.
- Cues can be created easily, either from the Dynamics Cues List or using the actions in the Dynamics FactBox.
- Cues can be set to automatically update themselves between 1 and 60 minutes.

## 3. Setup

To turn on the Dynamics Cues functionality, please go to the Dynamic Feature Management (using the Business Central Search) and check the Enabled checkbox.

CRONUS UK Ltd. | Sales | Purchasing | Inventory | Posted Documents | Shopify | All Reports |

Dynamic Feature Management: All | + New | Edit List | Related Setup | Related | Fewer options

Feature ↑	Enabled	Extension Name
Base App	<input checked="" type="checkbox"/>	Dynamic Base
Change Log Additions	<input checked="" type="checkbox"/>	Dynamic Base
Dynamic Cues	<input checked="" type="checkbox"/>	Dynamic Cues

**Feature Description**

Dynamic Cues allows users to create panels and cues in Business Central with no coding required.

From this page, you can also click on the Related Setup action here to open the Dynamics Cues Setup page (can also be opened using the Business Central Search).

Dynamic Cues Setup

Related

**General**

Enable Auto Refresh  No. Cues

No. Panels

On this page, there are the following fields:

- Enable Auto Refresh - the option to turn on/off the automatic refreshing of cues
- No. Panels – Shows the number of panels that have been created
- No. Cues – Shows the number of cues that have been created

There are also the following actions:

- Cue List – Opens the Dynamics Cues List page
- Panel List – Opens the Dynamic Panel List page
- Panel Selection – Opens the Dynamic Panel Selection page
- FactBox Selection – Opens the Dynamic FactBox Selection page

## 4. Create a Cue

There are two ways to create a cue.

### 4.1. From Scratch

Open the Dynamics Cues List page and click New

Dynamic Cues List

+ New | Edit List | Delete | Edit | View | Add to Panel | Show All | More options

Code ↑	Caption	Cue Type	Size	No. of Colour Thresholds
AS - OPEN JOBS	AS - Testing In Progress	Count	Normal	1
COM	Comm Job	URL	Normal	0
CUST	Active SaaS Customers	Count	Normal	0
CUST2	Active Customers	Count	Normal	2
D-C WEBSITE	DC Website	URL	Normal	0
DEVOPS	Azure DevOps	URL	Normal	0

This will open the Dynamics Cues Card where you define the cue.

Dynamics Cue Card



✓ Saved  

# CUSTBALLCY

 Copy Cue  Copy Colour Thresholds  Add to Panel | [More options](#)

## General

Code .....	<input type="text" value="CUSTBALLCY"/>	Cue Type .....	<input type="text" value="Sum"/>
Caption .....	<input type="text" value="Customer Balance (LCY)"/>	Refresh Timer .....	<input type="text" value="1"/>
Tooltip .....	<input type="text" value="Shows the total of all customer balances in LCY"/>		

## Lookup

Lookup Table .....	<input type="text" value="Customer"/>	Lookup Field Type .....	<input type="text" value="Decimal"/>
Lookup Table Filter Lines .....	<input type="text" value="1"/>	Use Manual Filter .....	<input checked="" type="checkbox"/>
Lookup Page Override .....	<input type="text"/>	Record Filter .....	<input type="text"/>
Lookup Field .....	<input type="text" value="Balance (LCY)"/>		

## Cue Filters

Dynamics Filters ▾

Current Filter Output .....

```
where(Location Code=const(green))
```

Filter Field	Filter Field Type	Operation	Value	Value 2
→ Location Code	Code	Equals	green	

### 4.1.1. General Section

Populate the new Cue with a code, Caption (the label on the cue), and Tooltip (what will be shown if you hover over the cue).

The Cue Type field dictates what the Cue will show. You have the following options:

- Lookup – Looks up the specific value of a field
- Sum – Totals the value of a specific field
- Count – Counts the number of records
- Average – Averages the value of a specific field
- Min – Finds the minimum value of a field
- Max – Finds the maximum value of a field
- Run Object – Runs a specific object, such as a report
- URL – Opens a web page to the specified URL

The Lookup, Sum, Count, Average, Min and Max are all similar. In this example, we will do a Sum.

Refresh Timer – Specifies how many minutes between refreshes. If set to 0, the cue is not refreshed

### 4.1.2. Lookup Section

The Lookup Section defines the table and fields that the cue is linked to. It is only shown if the Cue Type is one of Lookup, Sum, Count, Average, Min or Max.

- Lookup Table Caption – The caption of the table that is being referenced
- Lookup Table Filter Lines – The number of filters that have been set on the table
- Lookup Page Override Caption – The caption of the page to use. If blank will use the default one
- Lookup Field– the caption of the field that is being referenced
- Lookup Field Type – the type of field that has been referenced
- Use Manual Filter – Advanced use only. Allows user to overwrite the filters and create their own filters. **NB When this is selected, the Cue Filters FastTab is not visible**
- Record Filter – Displays the current filter based on the filter lines set

**Lookup**

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Lookup Table .....	<input type="text" value="Customer"/>	Lookup Field Type .....	<input type="text" value="Decimal"/>
Lookup Table Filter Lines .....	<input type="text" value="1"/>	Use Manual Filter .....	<input type="checkbox"/>
Lookup Page Override .....	<input type="text"/>	Record Filter .....	<input type="text"/>
Lookup Field .....	<input type="text" value="Balance (LCY)"/>		

#### 4.1.3. Run Object

If the Cue Type is set to Run Object, the Lookup section will disappear and the Run Object section will be shown.

**Run Object**

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Run Object Type .....	<input type="text" value="Report"/>	Run Object Show Req... ..	<input type="checkbox"/>
Run Object Caption .....	<input type="text"/>	Run Object Report Pa... ..	<input type="text" value="No"/>

The Run Object Type can be set to either Report or Codeunit. **Please note, Codeunit should only be used with guidance from Dynamics Consultants!**

For reports, the request page can be set to be shown, or the cue can be set with specific report parameters. The report parameters can be set by click on the Run Object Report Params field. This will open the parameters for the report which will be saved for when the report is run. Please note, dates and other fields will not update and will always be set to the date entered originally.

#### 4.1.4. URL

When the Cue Type is URL, the URL section is shown where the web address can be entered.

**URL**

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URL Link .....	<input type="text" value="http://www.bbc.co.uk"/>
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### 4.1.5. Cue Filters

Cue filters are used to filter the table to get the result that you want to see on the cue. Select the field(s) that you want to filter on, the operation e.g. Equals, Less than, Greater than etc. and the value to filter on. Multiple filters can be specified as required. NB. Value 2 is used for the In Between Operation.

#### Cue Filters

Dynamics Filters ▾

Current Filter Output ..... where(Location Code=const(green))

Filter Field	Filter Field Type	Operation	Value	Value 2
→ Location Code	Code	Equals	green	

If the Value Lookup is selected, then a list of constants is displayed. These are used so that it is possible to include dynamic values in your filter such as Current User or Current Date.

#### Filter Constants

🔍 ▾ | + New | 🛠 Edit List | ⋮

↗ ✕

Const ↑

- **Current User** ⋮
- Current User (Guid)
- Current Date
- Current Time
- Current Date/Time
- Current Work Date
- Current Month
- Last Month
- Next Month
- Current Quarter
- Last Quarter
- Next Quarter
- Current Calendar Year
- Current Calendar Year
- Next Calendar Year

OK
Cancel

### 4.1.6. Appearance

This section controls the look of the Cue and the Value displayed on it.

Appearance

<b>Current Value</b>		<b>Preview Value</b>	
Cue Value	<input type="text" value="2,617"/>	Preview Value	<input type="text" value="0"/>
<b>Settings</b>			
Size	<input type="text" value="Normal"/>	<b>Role Center Preview</b>	
Radius	<input type="text" value="0"/>	<b>Colour Preview</b>	
Value Number Rounding	<input type="text"/>		
Value Format String	<input type="text" value="&lt;Sign&gt;&lt;Integer Thousand&gt;"/>	<b>FactBox Preview</b>	
Value Text Wrapper	<input type="text"/>	<b>Colour Preview</b>	
No. of Colour Thresholds	<input type="text" value="5"/>		
<b>Image Management</b>			
Upload Image			
Download Image			
Clear Image			
Image Display Option	<input type="text" value="Contain"/>		
Image Opacity	<input type="text" value="1.00"/>		

4.1.6.1. Current Value

Current Value is used to show you what value the cue would currently show, based on the filter settings above. Can be used to check that the filters are giving you the desired response.

<b>Current Value</b>	
Cue Value	<input type="text" value="2,618"/>

4.1.6.2. Settings

The Settings section can be set to adjust the appearance of the cue, and the value displayed on it.

<b>Settings</b>	
Size	<input type="text" value="Normal"/>
Radius	<input type="text" value="0"/>
Value Number Rounding	<input type="text"/>
Value Format String	<input type="text" value="&lt;Precision,0:0&gt;&lt;Sign&gt;&lt;Integer Thousand"/>
Value Text Wrapper	<input type="text"/>
No. of Colour Thresholds	<input type="text" value="5"/>

- Size – Can be Small, Normal, Wide, Extra-Wide and Widest. Normal is the same size as a standard Business Central Cue. Small is a quarter of the size and 4 can fit in the same space as a normal Cue. Wide, Extra-Wide and Widest are 2, 3, and 4 times the wide respectively.
- Radius – Used for rounding off the corners of Cues. 0 equals a square corner.
- Value Number Rounding – Used to reduce the size of the value displayed to the rounding setting selected, either blank (no effect), One, Thousand or Million. For example, setting this to a Thousand will show 86 for a value of 86,568.93. If this is used in conjunction with the Value Text Wrapper setting, 86,568.93 can be displayed as £86k for example.
- Value Format String – Applies the format string on the value. The lookup will show some standard format strings or the user can enter their own. The format string lookup can be added

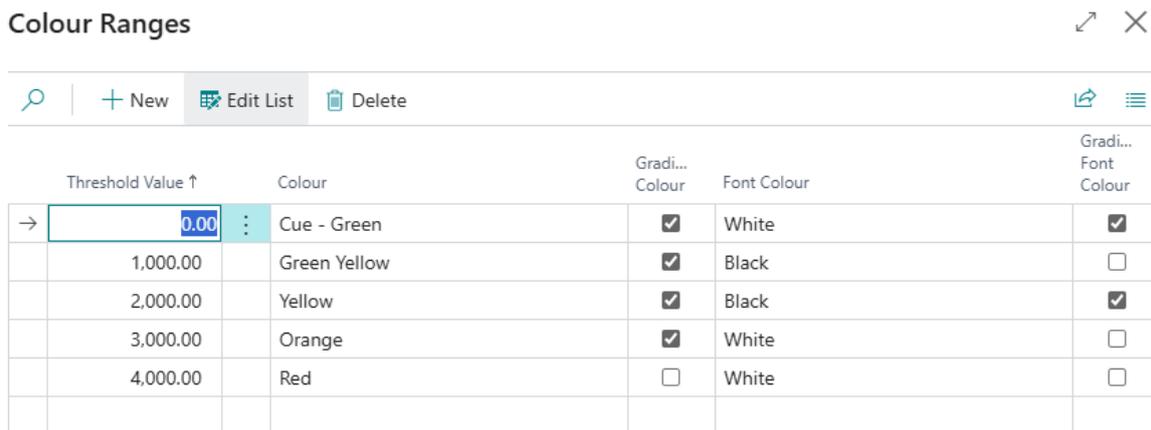
to by adding entries to the Number Format table. For example, using the format string of <Sign> <Integer Thousand> can be used to hide any decimals.

- Value Text Wrapper – Used to add text before and after the value. E.g. £%1K will give you £86K, if the Cue value was 86,568.93 and the Value Number Rounding setting is set to Thousand.
- No. of Colour Thresholds – Shows the number of Colour Thresholds that have been set up for the cue. Please see next section for more detail.

#### 4.1.6.3. Thresholds

The entries in the Colour Threshold section are used to change the colour of the cue background and text, depending on the value the cue is displaying. For example, if the cue is set up as below, if the Threshold value is set to 500, then (as the two Gradient Colour fields are set), then the background colour is halfway between Cue – Green and Green Yellow and the font colour is half way between white and black. If the gradient fields were not set, then the background would be Cue – Green and the text white. You can set as many of these as desired. Please try different values as the colours do not always look as expected, e.g. if you set 0 as Cue – Green and 4,000 as Red with the gradient set, 2,000 doesn't look half way between the colours so setting up multiple colours as below helps.

#### Colour Ranges



Threshold Value ↑	Colour	Gradi... Colour	Font Colour	Gradi... Font Colour
0.00	Cue - Green	<input checked="" type="checkbox"/>	White	<input checked="" type="checkbox"/>
1,000.00	Green Yellow	<input checked="" type="checkbox"/>	Black	<input type="checkbox"/>
2,000.00	Yellow	<input checked="" type="checkbox"/>	Black	<input checked="" type="checkbox"/>
3,000.00	Orange	<input checked="" type="checkbox"/>	White	<input type="checkbox"/>
4,000.00	Red	<input type="checkbox"/>	White	<input type="checkbox"/>

#### 4.1.6.4. Image Management

To display an image on the tile instead of a solid colour, use the Image Management section upload the image. The Image Display Option setting controls how the image is shown on the Cue:

- Contain – will fit the image in the tile proportionally, displaying all of the image.
- Fill – Stretches the image to fill the image. Displays the whole image but may look stretched.
- Cover – Keeps the image proportional but will cut off any of the image that doesn't fit on the Cue.

The Image Opacity is used to set the transparency of the image. If set to 1, then the image is completely opaque and no text will be seen. The lower this number, the more transparent the image will be.

Image Management

Upload Image

Download Image

Clear Image

Image Display Option ..... Contain

Image Opacity ..... 1.00

#### 4.1.6.5. Preview Value

The Preview Value can be used to see what the cue will look like, both on a Role Center page and the Factbox, with various values. Change this and the preview cues should update.

Preview Value

Preview Value ..... 1,500

#### 4.1.6.6. Role Center/Factbox Preview

Shows a preview of how the cue will look when displayed on a Role Center or a Factbox. Useful for tweaking the settings to make the Cue as readable as possible. As you can see from the below, the example will look good on a role center but not so much on a factbox. In this case, if this cue was to be shown on a factbox, then the caption should be shortened so that it doesn't conflict with the value.

Role Center Preview

Colour Preview



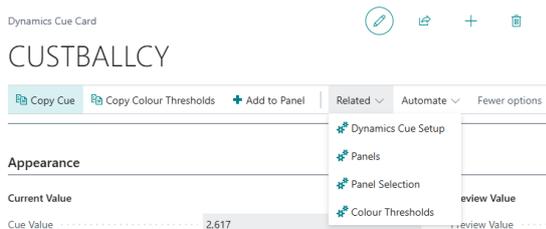
FactBox Preview

Colour Preview



## 4.2. Cue Card Actions

There are various actions on the Cue Card to help with the creation and use of cues.



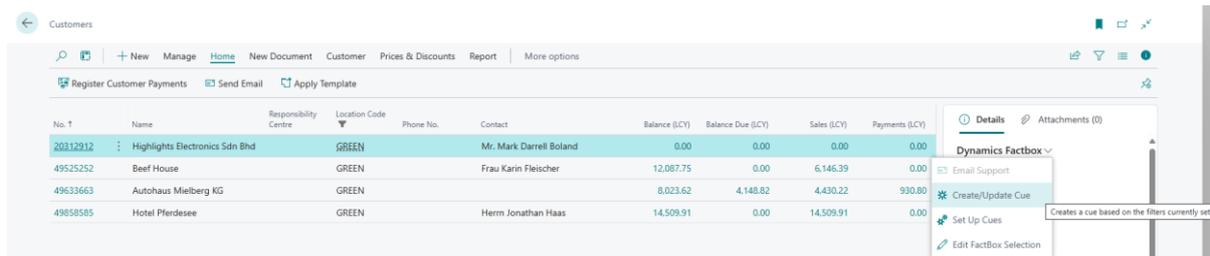
- Copy Cue will create a copy of the current cue as a new cue.
- Copy Colour Threshold can be used to copy another cue's colour thresholds to the current cue.

- Add to Panel is used to select a panel to add this cue to.
- Dynamics Cue Setup, Panels, Panel Selection and Colour Thresholds will navigate to the relevant page.

### 4.3. Quick Create

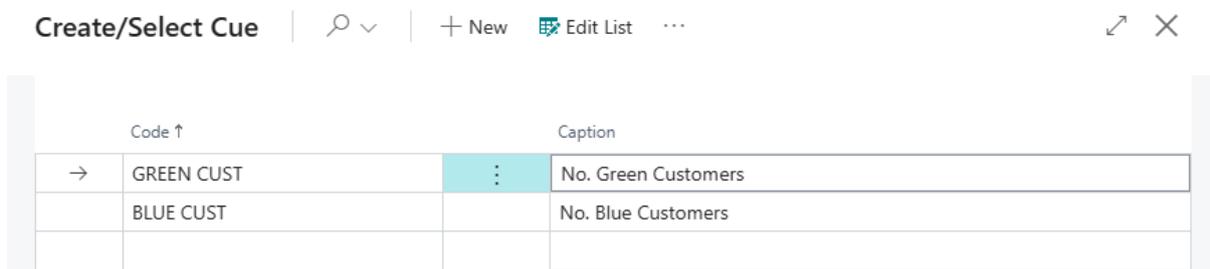
When the page that you are on has the Dynamic Factbox, there is the functionality to quickly create a Cue.

Navigate to a page and set one or more filters on it.

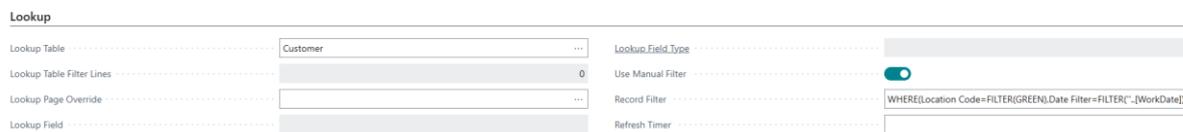


Click on the action dropdown on the Dynamic Factbox and select Create/Update Cue.

On the next page, either select an existing cue (to update) or click on New and create a new cue.



The Cue Card should be opened with the Record Filter already populated.



Set any other fields required such as Refresh Timer and your cue has been created.

## 5. Adding a Cue to a Panel

To see the cue on a page, it needs to be added to a Panel (and then the panel to the page).

This can be done in two ways.

### 5.1. From the Cue Card

On the Cue Card, select the Add to Panel action.

Dynamics Cue Card



✓ Saved  

# CUSTBALLCY

 Copy Cue  Copy Colour Thresholds + Add to Panel | Related ▾ Automate ▾ Fewer options

## General

Code .....	<input type="text" value="CUSTBALLCY"/>	Cue Type .....	<input style="border-bottom: 1px solid #ccc;" type="text" value="Sum"/>
Caption .....	<input type="text" value="Customer Balance (LCY)"/>	Refresh Timer .....	<input type="text" value="1"/>
Tooltip .....	<input type="text" value="Shows the total of all customer balances in LCY"/>		

## Lookup >

## Cue Filters >

## Appearance >

Either create a new Panel or select an existing one and click OK.

### 5.2. From the Panel List

Open up the Dynamics Cues Panel List. The Cue can either be added here directly in a free space or the Dynamics Cues Panel Card can be opened and edited in there.

The Cue will automatically be added to the first free space on the Panel. This can be adjusted later by editing the Panel if required.

 Cue BLUESO has been added to Panel SALES

OK

### 5.3. Panel List

On this page you can change the order of the Cues and place them into groups. The Name will be the name of the panel and the Group will be the name of the group. To place cues together in a group, just give them the same Group name.

Dynamics Cue Panel List

✓ Saved

| + New **Edit List** | More options

Code ↑	Name	Description	No. Cues
→ CUST	Customer Info	Displays information relevant to customers	7

Cues | Delete Line Move Up Move Down Add Cue

Cue Code	Cue Name	Group
→ DC	Test	Dynamics Consultants
TOM1	Tom Test	Dynamics Consultants
CUSTBALLCY	Customer Balance (LCY)	Dynamics Consultants
GREENCUST	No. Green Customers	Customers
BLUECUST	No. Blue Customers	Customers
BBC	-	Customers
TD01	Project Manager	Another Group

### 5.4. Adding a Panel to a Role Center Page

To see a Panel on a Role Centre Page, it needs to be added to that page. To do this, open to Dynamics Cues Panel Selection page.

#### Dynamic Cue Panel Selection

| + New **Edit List**

User Id	RoleCenter Caption	Panel Id 1	Panel Id 2	Panel Id 3	Panel Id 4	Panel Id 5
→	Sales Order Processor	VENDOR				
CHRISC	Sales Order Processor	CUSTOMER				

The User Id field is used to specify if this panel selection is for one particular user. If this panel selection is for all users, then leave this field blank.

In the Role Center Caption, enter the Caption of the page e.g. Sales Order Processor (or the id 9006) to specify that this panel will be shown on. Then on the Panel Id 1 – 12 fields, select which panels are to be shown.

### Dynamic Cue Panel Selection

User Id	RoleCenter Caption	Panel Id 1	Panel Id 2	Panel Id 3	Panel Id 4	Panel Id 5
	Sales Order Processor	VENDOR				
→ CHRISC	Sales Order Processor	CUSTOMER	SALES	...		

To show the panel on your page, the panel needs to be set to visible under Personalisation.

When the Role Center is opened, the panel should be shown as below:

**NB Please note that to see the various panels on the page, the panel's visibility needs to be turned on via the personalisation.**

## 6. Adding a Panel to the Dynamic Factbox

The Panel Selection for the Dynamic Factbox is similar to the panel selection for the Role Centers, but instead of selecting the page that the panels should be added to, the panel selection will be based on

the table shown in the main window e.g. for the Customers page, the table will be Customer, for Sales, the table would be Sales Header etc.

### Dynamic Cue FactBox Selection



 | 
  New | 
  Edit List | 
  Delete



User Id	Table Caption	Panel Id 1	Panel Id 2	Panel Id 3	Panel Id 4
	Customer	CUSTOMER			
→	⋮ Sales Header	SALES	⋮		