



Panels and Cues

User manual

This manual explains how to use assigned panels and how administrators configure profiles, cue tiles, filters and user assignments. Panels show record counts for selected business data and provide access to the matching records.

How the app is organized

- Profile: a reusable panel configuration containing a heading, appearance settings and cue lines.
- Cue: one tile with a caption, count, icon, colour, table, filters and drilldown page.
- Filter: a condition that determines which records a cue counts.
- Assignment: the profiles selected for a user's six panel slots.

Access

Panels Cue User allows everyday panel use. Panels Cue Admin includes user access and adds setup permissions. Ask your Business Central administrator to assign the appropriate permission set. Users also need permission to read the underlying business tables and open the drilldown pages.

Finding setup pages

Administrators can use Business Central search (Tell Me) to find Panel Profiles and Panel Assignments. From Panel Profiles, choose Edit to open a profile card; the list is not edited inline.

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Everyday use and first setup

Using your panels

1. Open your Role Center. The assigned profile heading identifies each panel.
2. Read the count on a cue tile. It represents matching records, not necessarily a monetary total.
3. Select a tile to open its configured page. The cue's filters and selected table key are applied.
4. Return to the Role Center when finished. Refresh or reopen it to update counts and assignments.

Counts can change as company data changes. Your business permissions and security filters affect the records available to you. A zero count can be a valid result.

Showing panel parts

Where the parts are hidden in your Role Center, use the standard Business Central Personalize function to expose the app's panel parts, then finish personalization. Ask your administrator for



help if personalization is restricted or the parts are unavailable. Blank panel assignments collapse automatically.

Administrator quick start

1. Open Panel Profiles and create a profile with a unique code, description and Panel Caption.
2. Add a cue line with a caption and table. Choose a compatible Page Name for drilldown.
3. Open Filter, select the fields and enter the required criteria. Run Test Filter.
4. Choose Preview and review the count, appearance and drilldown.
5. Enable the profile. Open Panel Assignments and select the user by User Name.
6. Assign the profile to a panel slot. Have the user expose the part if needed and refresh the Role Center.

Worked example

To show released sales orders, create a profile called SALES-TEAM and a cue captioned Released sales orders. Select Sales Header as Table Name and Sales Order List as Page Name. Add Document Type = Order and Status = Released using the value lookups. Test the filter and preview the profile before enabling and assigning it.

Compare the result with Sales Order List filtered to the same conditions in the same company and user context. This confirms that the cue represents the intended records.

Creating profiles and cue lines

Create a profile

1. Open Panel Profiles and choose New.
2. Enter Code, Description and Panel Caption. The code cannot be renamed after saving.
3. Choose Tile Size and Font Size. Medium is the default.
4. Add and test cue lines before enabling the profile. New profiles start disabled.
5. Close the card to save, or use Preview to review it.

Panel Caption is the visible heading. If it is blank, the description is used. Disabling a profile prevents its cues from displaying and removes it from the enabled-profile assignment lookup.

Add a cue

1. On the profile card, create a new line in Cues and enter a short, meaningful Caption.
2. Select Table Name using its lookup. The app sets a default list page where one is available.
3. Review Page Name and select a page that uses the same table.
4. Leave Table Key at its primary-key default unless another key is suitable for the filters.
5. Choose Icon and Colour, and enable the cue when it is ready.
6. Add filters, choose Test Filter, and review the whole profile using Preview.

Tables and pages are selected by name. System-range objects are excluded. If there is no appropriate default page, select a compatible page manually. Changing a table can invalidate previous filters or metadata, so review the cue again.

Reorder or hide cues

Select a cue line and choose Move Up or Move Down. Its filters and configuration move with it. Clear Enabled to hide a cue without deleting its setup. Re-enable it to restore it.



Understanding Table Key

Table Key shows the primary key when no alternative has been selected. A chosen alternative key is used for both counting and opening matching records. The key affects access and ordering; it does not replace filters. Check performance using Debug before adopting a different key.

Entering and testing filters

Add filter conditions

1. Select a saved cue line and choose Filter, or select its Filter summary.
2. Create a filter row and use the field lookup to select the table field.
3. Enter a filter value directly, or use its lookup/AssistEdit control.
4. Repeat for other fields, then close Cue Filters.
5. Choose Test Filter. Successful confirms that the conditions evaluate; an error shows the problem to correct.

Conditions on different fields normally apply together. For example, Document Type = Order and Status = Released restrict the cue to released orders. The profile line displays field names and values; it is blank when no filters exist.

Value lookups

- Boolean fields offer Yes and No.
- Option fields offer their defined values.
- Fields with a supported table relation offer related records, such as customers or vendors. Select the required record and confirm the lookup.
- If no suitable lookup is available, enter a valid Business Central filter directly. Cancelling a lookup preserves the previous value.

Direct filter examples

- 10000 — match one code or number on an appropriate field.
- 10000|20000 — match either value.
- 10000..20000 — match a range.
- >0 — match positive numeric values.
- ABC* — match text beginning with ABC where supported.

Use dates and numeric formats appropriate to your Business Central language and field type. Verify the expression with Test Filter. Avoid duplicate rows for the same field unless you have confirmed the resulting behavior; use one combined expression when appropriate.

Available fields

Restricted field types, including GUID, media and BLOB fields, are excluded from field selection. Supported Flow Fields can be filtered using calculated values. Flow Field results can depend on Flow Filters and company setup; compare them with a standard page using the same context.

Changing or removing filters

Selecting a different field clears its previous value. Delete unwanted filter rows, close the list, and preview again. A new cue should not inherit filters from the line above. Test Filter does not confirm that the count is the intended business result; use Preview and drilldown for that check.



Assignments and copying

Assign profiles to a user

1. Open Panel Assignments and create a row.
2. Select User Name. Assignment rows cannot be renamed to another user.
3. Select an enabled profile for each required Panel 1 to Panel 6 slot.
4. Leave unused slots blank. Save, then ask the user to refresh their Role Center.

Each user can have up to six assigned profiles. Unassigned panel content collapses. Assignments are company-specific; review the setup in each company where the app is used.

Add several users

1. Choose Add Users.
2. Select the required users using the standard multi-selection controls.
3. Confirm the selection. Missing assignment rows are created and existing assignments are preserved.
4. Set their profiles manually or use the copy actions.

Copy assignments between users

Copy From User copies one selected source user's six panel slots into the current row. The source must already have an assignment. Copy To User(s) copies the current row to the selected destination users, creating assignment rows where needed.

Copying assignments replaces all six destination slots, including clearing a slot when the source slot is blank. Review the destination users before confirming. Refresh their Role Centers after the change.

Copy cue lines between profiles

1. Open the destination profile and choose Copy From Profile, then select one source profile; or open the source and choose Copy To Profile(s).
2. Select the required destination profiles when using Copy To Profile(s).
3. Confirm and review the reported number of copied lines.
4. Open the target profiles, check their filters and preview them.

Profile copy actions are available on both the list and card. They add cue lines and filters whose line numbers are missing in the destination. Existing line numbers are skipped, even if their captions differ; they are not overwritten. Profile header settings are not copied. Copy From the same profile is rejected; Copy To skips the source itself.

Appearance preview and performance

Tile appearance

Tile Size and Font Size are set on the profile and apply to its cues. Choose Small, Medium or Large independently. Medium preserves the default appearance. Use concise captions and Preview to check combinations before assigning them.

Each cue has an icon and colour. Icons appear in monochrome to the right of the count; the selected colour identifies the tile accent. Long captions can wrap onto multiple lines.



Automatic sizing

Tiles wrap to the available width. Panel height grows or shrinks with its contents, avoiding an internal vertical scrollbar and excess white space. The Role Center page itself can still scroll when the total content exceeds the screen. Unassigned panels collapse.

Preview a profile

1. Select the profile in Panel Profiles or open its card.
2. Choose Preview.
3. Check the heading, enabled cues, counts, colours, icon alignment and tile sizes.
4. Select a cue to verify its drilldown, then return.
5. Close Preview. It does not change your user assignments.

Performance diagnostics

1. Enable Debug on the profile.
2. Refresh the Role Center or reopen Preview.
3. Read the small server-load and individual cue timing details. Client display timing is also shown where available.
4. If one cue is slow, review its table, filters and selected key.
5. Compare several reloads using the same data and filters before and after a key change.
6. Disable Debug when the comparison is complete.

Timings vary with data volume, server load and caching. A different key does not guarantee a faster result. Confirm that the count and drilldown still represent the same records after changing configuration.

Troubleshoot display differences

After changing settings, refresh the Role Center first. If appearance differs by browser or device, compare the same profile and window width. Ask your administrator to check personalization if parts remain hidden.

Demo setup maintenance and troubleshooting

Create demo profiles

1. As an administrator, open Panel Profiles and locate Create Demo Setup in the actions menu.
2. Run it to create example profiles for Sales, Purchasing, Warehouse, Finance, Logistics and Service.
3. Review the cues against your company data and available functionality.
4. Preview the profiles and adjust them for your users.

The action preserves existing profiles and assignments and fills applicable empty panel slots for the current user. Example counts may be zero where no matching company data exists. Existing demo profiles are not automatically overwritten with later changes.

Delete configuration

Deleting a cue removes its filter lines. Deleting a profile removes its cues and their filters. If the profile is assigned, the app asks for confirmation before removing the profile and clearing references to it in user assignments. Declining leaves the setup in place. Use disabling when you want to retain the configuration.



Common problems

- Panel missing: check the assignment in the current company, profile Enabled status, Role Center personalization and permissions; refresh the client.
- Tile missing: check the cue's Enabled setting and profile assignment.
- Unexpected count: compare the selected table and every filter with the standard list in the same company and user context.
- Lookup value not suitable: confirm the field and its relation; enter a valid direct filter and test it if the relation needs context the lookup cannot supply.
- Drilldown table mismatch: choose a Page Name whose underlying table matches Table Name.
- Count differs from the opened list: check whether the standard page adds its own filters or whether data changed between loading and clicking.
- Copy added fewer lines than expected: destination line numbers already exist and are skipped.
- Access denied: have an administrator review both app permissions and underlying business-data permissions.
- Slow panel: enable Debug, identify the slow cue and compare suitable keys and filters.

Version Information

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