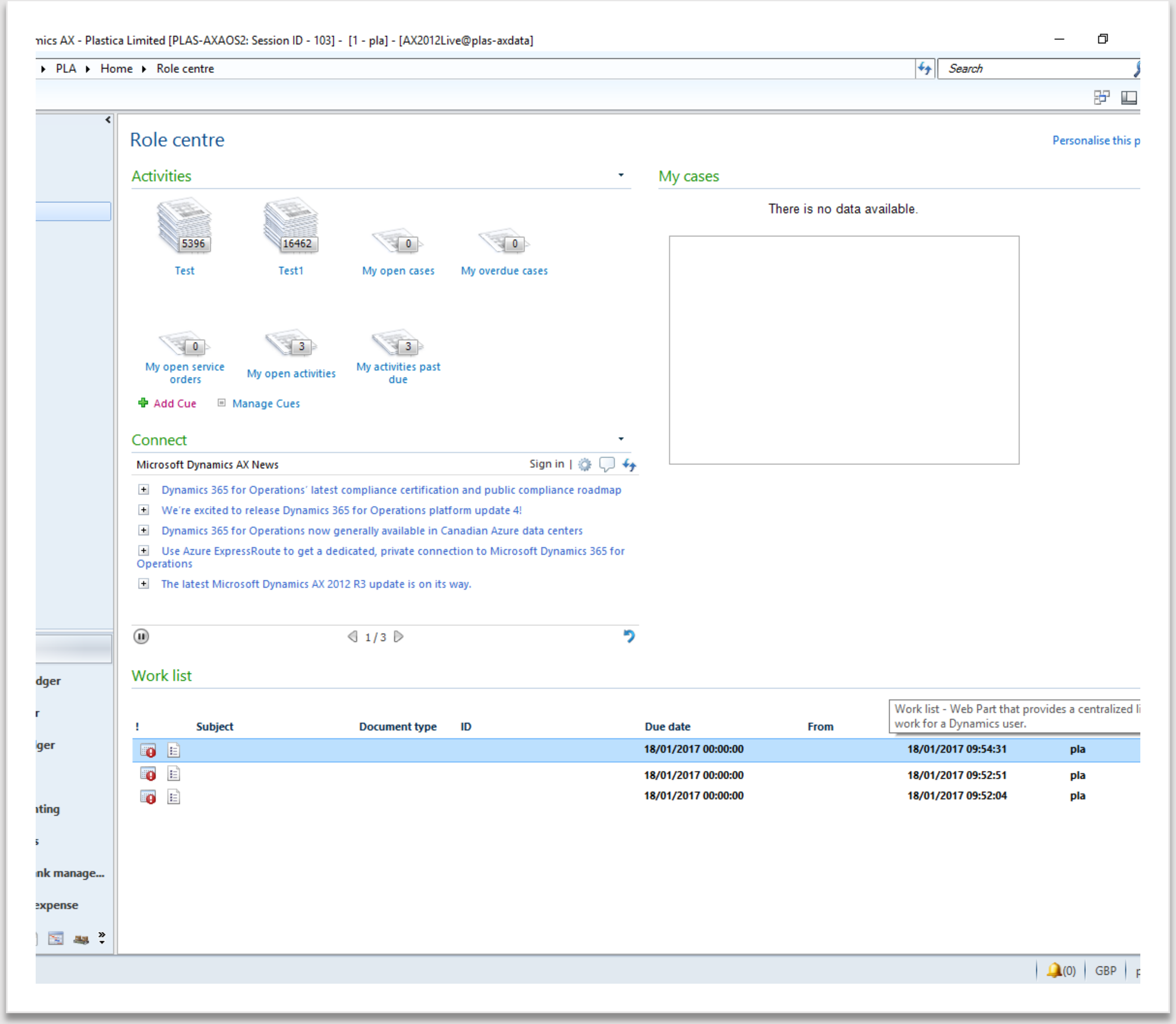
Managing Cues in AX

Cues allow you to quickly organise filtered data into quick preview icons which offer a visual representation of a user's workload and the user's remaining work items, such as sales leads or overdue activities.

View Cues

To View Cues, open AX and navigate to Home > RoleCentre. By default, Cues will be listed under the “Activities” web part.

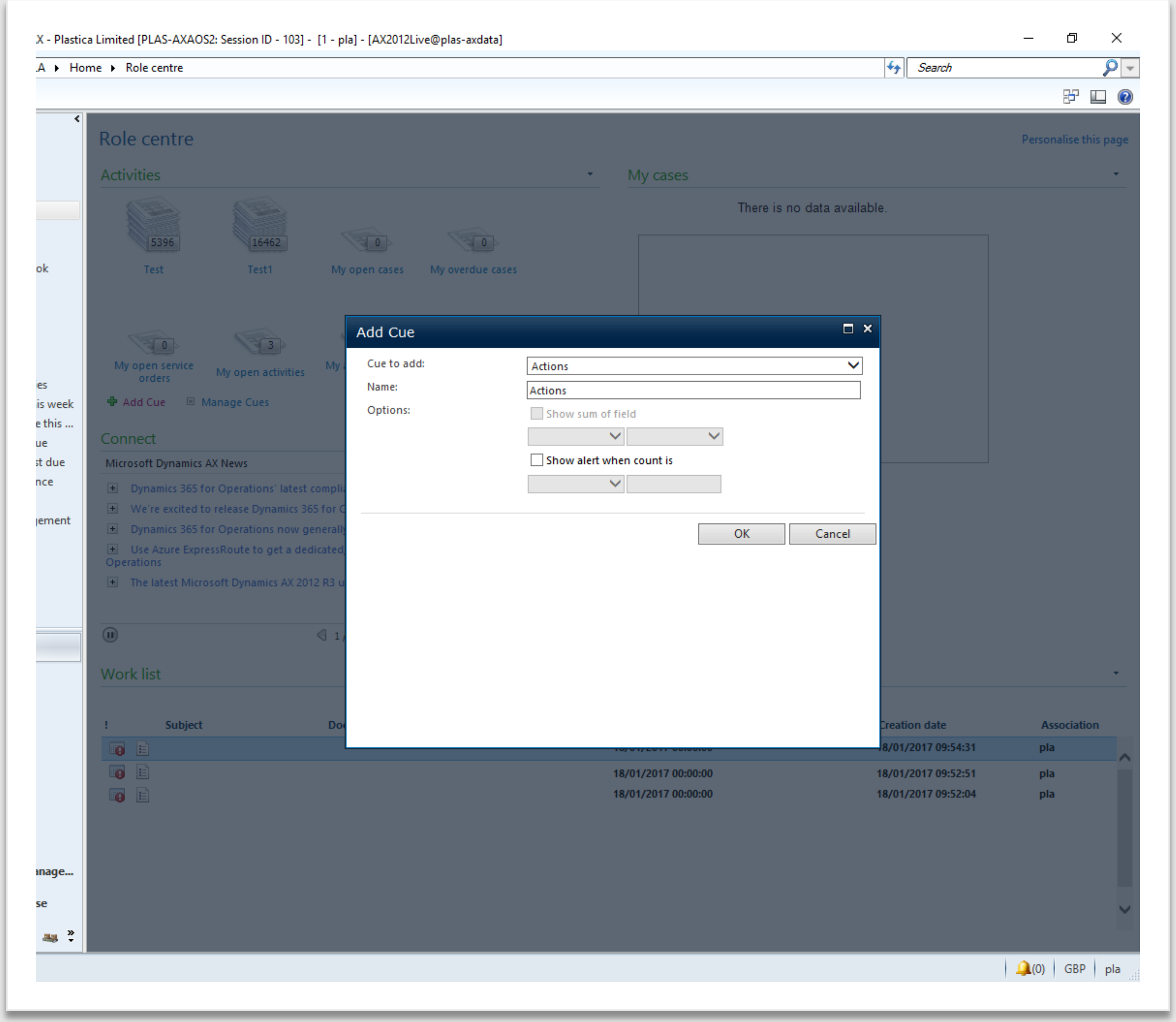


Adding Cues

To add a default Cue to your RoleCentre, click the “add Cue” link and select the desired item from the drop down.

Once selected, you can change the name and setup alerts to notify you when certain criteria is met. Press OK and the Cue should be added to your RoleCentre.

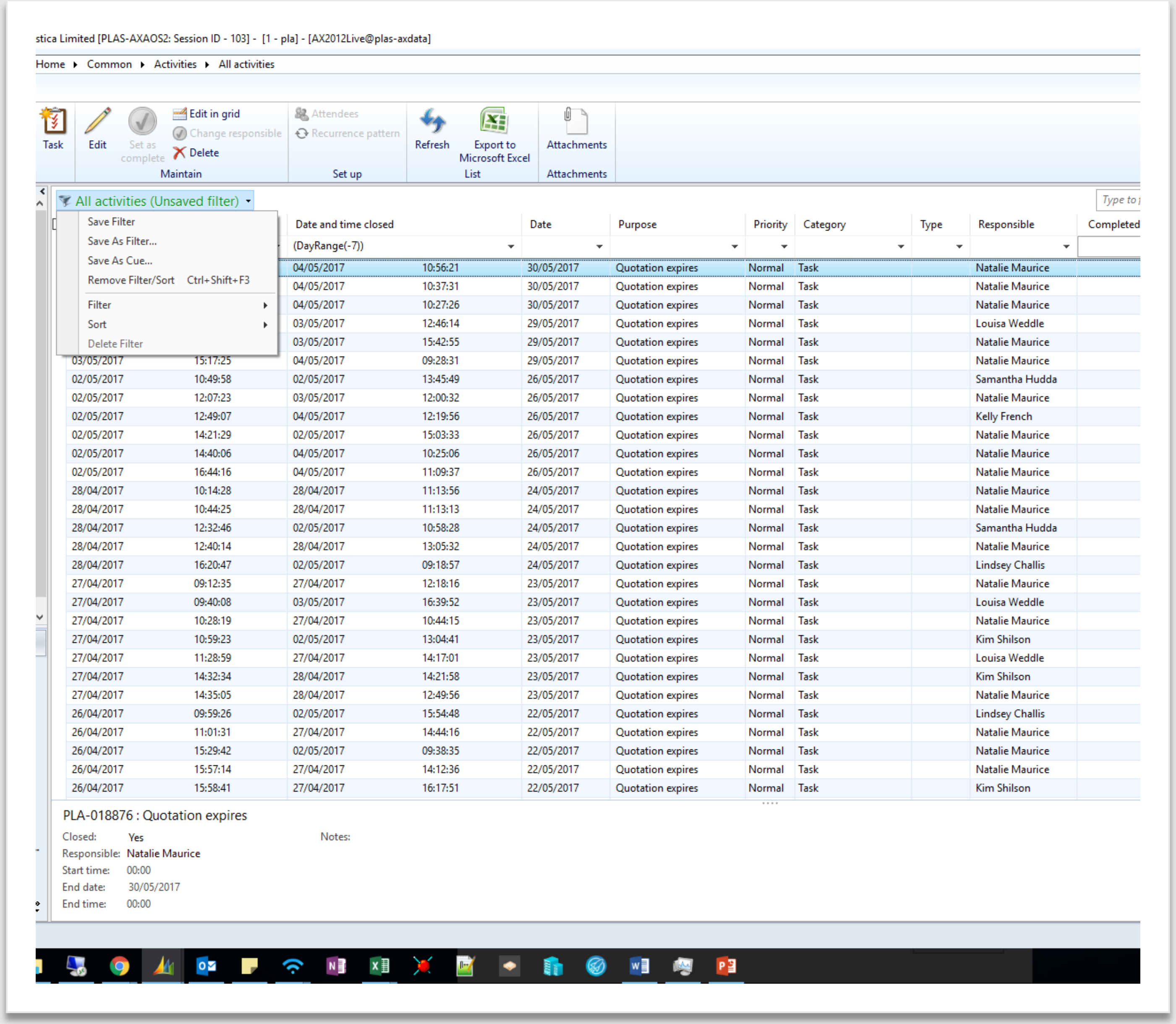
To add a custom Cue to your RoleCentre, click the “Manage Cues” link, ensure the cue is listed, then press OK.



Creating Custom Cues

Custom cues can be created from data that has already been filtered. In this example I want to create a cue for all activities completed in the last week.

After setting up your filters, click the drop down list in the top left and select “Save as Cue”. Give the Cue a name and decide if you'd like it to be viewable by other staff, then click OK. The newly created Cue will now be available for you to add in your RoleCentre.



Deleting / Amending Cues

To delete / amend a cue, go to Organisation Administration > Setup > Role Centre > Edit Cues.

From this screen you can edit the configuration by selecting the cue in question and altering the appropriate fields.

To delete a cue, simply highlight the row and click delete.