

User Manual

Aptean Food and Beverage ERP

Advanced Attributes

Product Documentation



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Manage permission sets
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Advanced Attributes

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Release notes

Article • 4/22/2026 • 3 min read

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

Date	Release version	Description
April 2026	2602.0.0.0	Major release
March 2026	2601.3.0.0	Stability release
February 2026	2601.2.0.0	Stability release
January 2026	2601.1.0.0	Stability release
January 2026	2601.0.0.0	Feature release
November 2025	2513.2.0.0	Stability release
October 2025	2513.1.0.0	Stability release
October 2025	2513.0.0.0	Feature release
September 2025	2512.1.0.0	Stability release
August 2025	2512.0.0.0	Feature release
August 2025	2511.0.0.0	Feature release
July 2025	2510.0.0.0	Feature release
July 2025	2509.1.0.0	Stability release
July 2025	2509.0.0.0	Feature release
July 2025	2508.0.0.0	Feature release
July 2025	2507.1.0.0	Stability release
May 2025	2507.0.0.0	Feature release
May 2025	2506.2.0.0	Stability release
April 2025	2506.1.0.0	Stability release
March 2025	2506.0.0.0	Feature release



March 2025	2505.0.0.0	Feature release
March 2025	2504.1.0.0	Stability release
February 2025	2504.0.0.0	Feature release
February 2025	2503.0.0.0	Feature release
February 2025	2502.1.0.0	Stability release
February 2025	2502.0.0.0	Feature release
February 2025	2501.0.0.0	Feature release
December 2024	2412.4.0.0	Stability release
December 2024	2412.3.0.0	Stability release
December 2024	2412.2.0.0	Stability release
November 2024	2412.1.0.0	Stability release
November 2024	2412.0.0.0	Feature release
November 2024	2411.0.0.0	Feature release
November 2024	2410.7.0.0	Stability release
November 2024	2410.6.0.0	Stability release
November 2024	2410.5.0.0	Stability release
October 2024	2410.4.0.0	Stability release
October 2024	2410.3.0.0	Platform release
October 2024	2410.2.0.0	Platform release
September 2024	2410.1.0.0	Stability release
September 2024	2410.0.0.0	Feature release
September 2024	2409.0.0.0	Feature release
August 2024	2408.2.0.0	Stability release
August 2024	2408.1.0.0	Stability release
August 2024	2408.0.0.0	Feature release



August 2024	2407.3.0.0	Stability release
August 2024	2407.2.0.0	Stability release
August 2024	2407.1.0.0	Stability release
July 2024	2407.0.0.0	Feature release
July 2024	2406.1.0.0	Stability release
July 2024	2406.0.0.0	Feature release
June 2024	2405.0.0.0	Feature release
June 2024	2404.1.0.0	Stability release
June 2024	2404.0.0.0	Feature release
June 2024	2403.5.0.0	Stability release
May 2024	2403.4.0.0	Stability release
May 2024	2403.3.0.0	Stability release
April 2024	2403.2.0.0	Stability release
April 2024	2403.1.0.0	Stability release
April 2024	2403.0.0.0	Feature release
March 2024	2402.3.0.0	Stability release
March 2024	2402.2.0.0	Stability release
March 2024	2402.1.0.0	Stability release
March 2024	2402.0.0.0	Feature release
January 2024	2401.0.0.0	Feature release
December 2023	2302.0.0.0	Feature release
December 2023	2301.7.0.0	Stability release
December 2023	2301.6.0.0	Stability release
December 2023	2301.5.0.0	Stability release
November 2023	2301.4.0.0	Stability release



November 2023	2301.3.0.0	Stability release
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December 2022	2.4.71327.0	Stability release
December 2022	2.3.68845.0	Stability release
November 2022	2.2.65082.0	Stability release
October 2022	2.1.63623.0	Stability release
September 2022	2.0.58246.0	Feature release



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August 2022	1.11.55449.0	Stability release
May 2022	1.11.48964.0	Stability release
April 2022	1.10.46920.0	Stability release



2602.0.0.0

Release Note • 4/22/2026 • 3 min read

Features

With the features added in this release of the Aptean Advanced Attributes extension,

- You can define lot attribute categories such as *Heavy Metals*, *Microbial*, and *Physical* through the **Lot Attribute Categories** page, and assign them to lot attributes using the new **Attribute Category** field on the **Lot Attribute** page, enabling enhanced data organization and filtering capabilities. For more information see [Define lot attribute categories](#)
- You can track the QA testing outcome for lot attributes through the **QA Status** field on the **Lot Attribute Value Selection** page, which is automatically populated when QA test results are linked to a lot attribute and can also be manually set by users. For more information see [View QA status on lot attributes](View-QA status-on-lot-attributes.md)
- You can select only specification-compliant lots for customer orders through the **Spec-Compliant Lot Selection** page, which filters available lots based on customer specification profile criteria with support for **Strict** mode (compliant lots only) and **Show All** mode (with override approval for non-compliant lots), including a **Lot Compliance** FactBox displaying detailed attribute pass/fail comparison. For more information see [Select spec-compliant lots](Select-spec-compliant lots.md).
- You can control when and how the system updates lot attribute values and requirements using the **Target Table** field on the **Lot Attribute Source Mapping** page, replacing the **Trigger** field.
 - When you upgrade to this release, the system automatically updates existing mappings to the new structure: Mappings with **Trigger = On Assign** are updated to use **Target Table = Lot Attribute Value**. Mappings with **Trigger = On Modify** are updated to use **Target Table = Lot Attribute Filter Requirement**.
 - The system supports using data from the **Tracking Specification** page as a source for purchase orders and released production orders.
 - The system supports automatic recalculation of lot attribute values when mapped source fields are modified after the lot number is created from a purchase order or production order.
 - The system supports automatic recalculation of lot attribute requirement values when mapped source fields are updated or modified on sales orders.

For more information, see [Lot attribute source mapping](#).

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean [Simple Factory Wizard](#) extension. To know more, see [What's new in Simple Factory Wizard, version 2601.0.0.0](#).



UI/UX changes

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

- The **Lot Attribute Categories** page has been added.
- The **Attribute Category** field has been added to the **Lot Attribute** page.
- The **QA Status** field has been added to the **Lot Attribute Value Selection** page. T
- The **Spec-Compliant Lot Selection** page has been added.
- The **Lot Compliance FactBox** has been added to the **Spec-Compliant Lot Selection** page.
- The **Trigger** field has been replaced by the **Target Table** field on the **Lot Attribute Source Mapping** page.
- The **Tracking Specification (Table 336)** option has been added to the Source Table ID field on the **Lot Attribute Source Mapping** page.

Resolved issues

The following issue has been resolved in this release.

ID	Description
350556	The system restricts to add, edit, or delete the records on the Lot Attribute Values page. This issue arises only when navigating to the Lot Attribute Values page by selecting Related > Lot No > Attributes action on the Lot No. Information Card page.



2601.3.0.0

Release Note • 3/25/2026 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean Shop Floor Production (BC) extension. To know more, see [What's new in Shop Floor Production \(BC\), version 2601.3.0.0](#).



2601.2.0.0

Release Note • 2/25/2026 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Apteian Shop Floor Production (BC) extension. To know more, see [What's new in Shop Floor Production \(BC\), version 2601.2.0.0](#).



2601.1.0.0

Release Note • 1/28/2026 • 1 min read

Enhancements/Modifications

With this release of the Apteon Advanced Attributes extension, the translation file for the Polish (pl-PL) language has been updated with standard texts for better readability.

Resolved issues

The following issue has been resolved in this release.

ID	Description
326616	The system fails to apply lot attribute inheritance when using the production journal, applying it only when output lots are assigned on the Released Production Order page.



2601.0.0.0

Release Note • 1/28/2026 • 1 min read

Features

With the features added in this release of the Aptean Advanced Attributes extension,

- The lot attribute values can be automatically populated when a lot number is created from a purchase order or production order based on the configurations on the **Lot Attribute Source Mapping** page.
- Lot attribute requirement values can automatically be inserted into sales order lines based on the configurations on the **Lot Attribute Source Mapping** page.
- The system supports multiple source mappings per lot attribute with defined processing order, applying the first valid value found.

For more information, see [Lot attribute source mapping](#).

- This extension has been updated to ensure interoperability with the recent changes in the Aptean Service Provisioning extension. To know more, see [What's new in Service Provisioning, version 2601.0.0.0](#).
- This extension has been updated to ensure interoperability with the recent changes in the Aptean Dynamic Production extension. To know more, see [What's new in Dynamic Production, version 2601.0.0.0](#).
- This extension has been updated to ensure interoperability with the recent changes in the Aptean Formulation Management extension.

Integrations

The Aptean Advanced Attributes extension has been integrated with the Aptean [Backorder Management](#) extension. To know more, see [Integrations](#).

UI/UX changes

The **Lot Attribute Source Mapping** page has been added.



2513.2.0.0

Release Note • 11/26/2025 • 2 min read

Enhancements/Modifications

With this release of the Aptean Advanced Attributes extension, the translation file for the Swedish (sv-SE) language has been updated with standard texts for better readability.

Resolved issues

The following issues have been resolved in this release.

ID	Description
334575	The system incorrectly allows removing a hierarchy code from an item lot attribute template even when the hierarchy code is assigned to an item.
338774	The system displays incorrect values for nested attributes on the Lot Attributes Values page linked to the incoming documents. This issue also occurs on the Lot Attribute Template page associated with the Item Card and Item Category Card pages.
340297	The system incorrectly retains the Variety field value on the Purchase Order page even when the Classification field value is updated. This issue occurs in all the incoming documents.
334431	The system fails to apply hierarchy restrictions in incoming documents when entering values for global lot attributes on the Lot Attribute Values page.
334432	The system fails to filter based on hierarchy templates in outgoing documents when entering values for global lot attributes on the Lot Attribute Filter Requirements page.
334452	The system incorrectly restricts changing the Fixed Value field value on the Lot Attribute Template page associated with items or item category lots.
334786	An error occurs when updating the Value field value for hierarchy attribute on the Lot Attribute Values page associated with purchase orders.
339913	The system incorrectly synchronizes the item's lot attribute template when a hierarchy code is added back to the lot attribute template of the item category.
340161	An error occurs on the Lot Attribute Template page for the hierarchy code selected when the system processes a large amount of data on the Lot Attribute Hierarchy Template page associated to the Item Card page.



2513.1.0.0

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

Resolved issues

The following issue has been resolved in this release.

ID	Description
333184	The system does not prompt to update the source line when a higher quantity is entered in item tracking lines than the quantity specified in the production journal lines or item journal lines. As a result, the Item Tracking Lines page can be closed without any message prompting to adjust the line quantity, which may cause posting errors.



2513.0.0.0

Release Note • 10/22/2025 • 2 min read

Features

With the features added in this release of the Aptean Advanced Attributes extension,

- You can create lot attribute hierarchy templates, define parent-child relation levels, and specify allowed lot attribute values per level. This ensures consistent, hierarchy-driven lot attribute value selection across documents. For more information, see [Set up lot attribute hierarchy templates](#).
- You can apply these lot attribute hierarchy templates to item or item category lots. For more information, see [Apply hierarchy templates to item or item category lots](#).
- When assigning lots in purchase documents and output lines of production orders, the system automatically inherits lot attributes defined in the hierarchy template associated with the item on the **Lot Attribute Values** page. For more information, see [To incoming purchase documents](#) and [Output lines of the production order](#).
- When filtering lots in sales documents, component line of production orders, and transfer orders, the system automatically filters lot attributes as defined in the hierarchy template associated with the item on the **Lot Attribute Filter Requirements** page. For more information, see [To outgoing sales documents](#), [Component lines of the production order](#), and [Assign lot attributes to transfer orders](#).
- When the Aptean [Quality Control](#) (BC) extension is installed, the system displays global lot attribute values on the **Quality Control Checks** and **Posted Quality Control Checks** pages when the related purchase, sales, production, or transfer order lines are associated with one lot. This helps with filtering and sorting quality control checks based on global lot attributes. For more information, see [What's new in Quality Control \(BC\), version 2511.0.0.0](#).

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the:

- Aptean Service Provisioning extension. For more information, see [What's new in Service Provisioning, version 2503.0.0.0](#).
- Aptean Trading Board extension. For more information, see [What's new in Trading Board, version 2503.0.0.0](#).

UI/UX changes

- The **Lot Attribute Hierarchy Templates** list and **Lot Attribute Hierarchy Template** card pages have been added.
- The **Hierarchy Code** field has been added to the **Lot Attribute Template** page.



- The **Level** field has been added to the **Lot Attribute Template**, **Lot Attribute Values**, and **Lot Attribute Filter Requirement** pages.



2512.1.0.0

Release Note • 9/24/2025 • 1 min read

Enhancements/Modifications

With this release of the Apteian Advanced Attributes extension, the translation file for the Swedish (sv-SE) language has been updated with standard texts for better readability.



2512.0.0.0

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. For more information, see [Highlights of version 2501.0.0.0](#).

Integrations

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



2511.0.0.0

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 Grower Return extension. For more information, see [What's new in Grower Return, version 2504.0.0.0](#).



2510.0.0.0

Release Note • 7/30/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
282775	The system fails to retain the price of attached tax lines when a posted sales invoice is corrected using the Correct Financial action. While the corrective credit memo is posted, the newly generated sales invoice automatically fetches updated sales prices, but the associated tax lines are updated with blank values in the Unit Price Excl. VAT and Line Amount Excl. VAT fields.



2509.1.0.0

Release Note • 7/30/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
303982	When the language is set to Dutch, the system incorrectly translates the caption Customer Attributes .



2509.0.0.0

Release Note • 7/30/2025 • 2 min read

Features

With the feature added in this release of the Apteian Advanced Attributes extension, you can define global lot attribute values for trade plan rate lines with the **Item Type** field value set to *All Items* or *Item Category* on the **Trade Plan Rates** page.

Note

This feature is available only when the Apteian [Trade Management](#) extension is installed. For more information, see [What's new in Trade Management, version 2506.0.0.0](#).

Resolved issues

The following issues have been resolved in this release.

ID	Description
305476	The system fails to display the trade plans on the Document Trade Lines page of a purchase order created from an imported manifest via the Manifest page. This issue occurs for trade plans with the Rate Type field value set to <i>Amount per Shipping Unit</i> or <i>Amount per Shipping Container</i> . This issue arises only when the Apteian Global Trade , Apteian Packaging , and Apteian Trade Management extensions are installed.
309885	The system applies the incorrect trade plan rate when global lot attribute values are specified for an item on a released production order. This issue occurs when the item is inherited from the Family Profile page and the Apteian Production Family Profile and Apteian Trade Management extensions are installed.
309881	The system applies the incorrect trade plan rate when global lot attribute values are specified for an item on a sales order created from a sales contract. This issue occurs only when the Apteian Contract Management and Apteian Trade Management extensions are installed.
309529	The system applies the incorrect trade plan rate when global lot attribute values are specified for an item on a purchase order created from a harvest order or commodity receipt. This issue occurs only when the Apteian Commodity Harvest Planning and Apteian Trade Management extensions are installed.



2508.0.0.0

Release Note • 7/30/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Advanced Attributes extension,

- The system does not display the **Lot Attributes** section on the FactBox of the **Inventory Overview** page for users with the indirect permission set.

Note

This enhancement is applicable only when the Aptean [Inventory Overview](#) extension is installed.

- This extension has been updated to ensure interoperability with the recent changes in the Aptean Service Provisioning extension. For more information, see [What's new in Service Provisioning, version 2502.0.0.0](#).



2507.1.0.0

Release Note • 7/2/2025 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean Shop Floor Production (BC) extension. To know more, see [What's new in Shop Floor Production \(BC\), version 2507.2.0.0](#).

Integrations

The Aptean Advanced Attributes extension has been integrated with the Aptean [Shop Floor Production \(BC\)](#) extension. For more information, see [Integrations](#).



2507.0.0.0

Release Note • 5/13/2025 • 2 min read

Features

With the features added in this release of the Aptean Advanced Attributes extension, you can:

- Set up specific tables as lot attributes by selecting the *Lookup* option in the **Type** field on the **Lot Attribute** page. Additionally, you can apply filters to the table using the **Lookup Table Filters** action. For more information, see [Set up lot attributes](#).
- Select the **Copy Lot Attributes** action to copy lot attributes to the **Lot Attribute Template** page of items or item categories, based on the **Copy to Template** field value on the associated **Lot Attribute** page. For more information, see [Set up lot attribute templates for item lots](#) and [Set up lot attribute templates for item category lots](#).
- Update lot attribute templates for items or item categories with lot attributes based on the **Copy to Template** field value on the associated **Lot Attribute** page. For more information, see [Update lot attribute templates](#).

Integrations

The Aptean Advanced Attributes extension has been integrated with the Aptean [Service Provisioning](#) extension. For more information, see [Integrations](#).

UI/UX changes

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

- The **Update Lot Attribute Templates** page has been added.
- The following actions have been added to the **Lot Attribute** page:
 - Lookup Table Filters
 - Update Lot Attribute Templates
- The **Copy Lot Attributes** action has been added to the **Lot Attribute Template** page.
- The following fields have been added to the **Lot Attribute** page.
 - Lookup Table No.
 - Copy to Template



2506.2.0.0

Release Note • 5/7/2025 • 1 min read

Enhancements/Modifications

With this release of the Apteian Advanced Attributes extension, the translation file for the Polish (pl-PL) language has been added.



2506.1.0.0

Release Note • 4/9/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
280743	The system incorrectly displays an error message when filtering for customers using the Filter by Attributes action on the Customers list page. This issue occurs if the No. field value has been changed on the associated Customer Card page.



2506.0.0.0

Release Note • 3/14/2025 • 1 min read

Features

With this release of the Aptean Advanced Attributes extension, the system applies approved supplier and item requirements to purchase contracts, when the Aptean Approved Supplier extension is installed. For more information, see [Highlights of Approved Supplier, version 2501.0.0.0](#).

Integrations

The Aptean Advanced Attributes extension has been integrated with the Aptean [Approved Supplier](#) extension. For more information, see [Integrations](#).



2505.0.0.0

Release Note • 3/14/2025 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Apteian Advanced Pricing extension. To know more, see [What's new in Advanced Pricing, version 2504.0.0.0](#).



2504.1.0.0

Release Note • 3/12/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
264682	An error occurs when modifying field values on the Customer Attribute page if the Language field value is set to <i>French (Belgium)</i> on the My Settings page.



2504.0.0.0

Release Note • 2/26/2025 • 1 min read

Features

With this release of the Aptean Advanced Attributes extension, if you have the Aptean [Order Minimums](#) extension installed, you can apply minimum order requirements to customer and vendor attributes. For more information, see [Highlights of Order Minimums, version 2501.0.0.0](#).

Integrations

The Aptean Advanced Attributes extension has been integrated with the Aptean [Order Minimums](#) extension. For more information, see [Integrations](#).



2503.0.0.0

Release Note • 2/26/2025 • 1 min read

Features

With this release of the Apteian Advanced Attributes extension, if you have the Apteian [Quick Production](#) extension installed, you can configure the system to automatically copy lot attribute requirements from sales orders to production orders and production order components for broken items. For more information, see [What's new in Quick Production, version 2502.0.0.0](#).

Integrations

The Apteian Advanced Attributes extension has been integrated with the Apteian [Quick Production](#) extension. For more information, see [Integrations](#).



2502.1.0.0

Release Note • 2/26/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
261762	The system does not allow entering numeric values or special characters in the Value field value on the Lot Attribute Values page. This issue occurs when the Type field is set to <i>Text</i> on the Lot Attribute page.



2502.0.0.0

Release Note • 2/12/2025 • 1 min read

Features

With this release of the Aptean Advanced Attributes extension, you can:

- Set up minimum and maximum value requirements for lot attributes. For more information, see [Set up lot attributes](#).
- Enter lot attribute values that adhere to the defined minimum and maximum value requirements when assigning lot attributes to lot numbers. For more information, see [Assign lot attributes](#).

UI/UX changes

The **Min. Value** and **Max. Value** fields have been added to the **Lot Attribute** page.

Resolved issues

The following issue has been resolved in this release.

ID	Description
263560	An error occurs when changing the Type field value on the Lot Attribute page and the same lot attribute type is selected.



2501.0.0.0

Release Note • 2/4/2025 • 1 min read

Features

With this release of the Aptean Advanced Attributes extension, you can:

- Set up the priority of allowed lot attribute values to indicate the scale or quality for an item or an item category, ensuring better lot filtering and selection. For more information, see [Set up priority lot attribute values](#).
- View lots on the **Lot No. List** page based on the selected lot attribute value and the corresponding priority setup. For more information, see [Manage the priority of lot attribute values](#).

UI/UX changes

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

- The **Lot Attribute Values Priority** page has been added.
- The **Lot Attributes Values Priority** action has been added to the **Lot Attribute Template** page.
- The **Values Priority Exist** field has been added to the **Lot Attribute Template** page.



2412.4.0.0

Release Note • 12/26/2024 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Apteian Buffer Orders extension. For more information, see [What's new in Buffer Orders, version 2401.4.0.0](#).



2412.3.0.0

Release Note • 12/20/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
236605	The system fails to filter the values in the License Plate No. field on the Item Tracking Lines page based on the lot attributes in the source document line when the Apteau License Plating extension is installed.



2412.2.0.0

Release Note • 12/13/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
246874	The system fails to display lines on the Lot Attribute Values page upon executing the Show Lot Attributes action on the Item Tracking Lines page of a sales credit memo. This issue occurs when inventory exists for the associated item and the sales credit memo is created from a posted sales invoice via the Create Corrective Credit Memo action.



2412.1.0.0

Release Note • 11/29/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
243167	The system incorrectly allows special characters and numerical values in the Fixed Value field on the Lot Attribute Template page when the Type field on the associated Lot Attribute page is set to <i>Text</i> .

Note

After this fix, the system displays an error message if you enter special characters or numerical values in the **Fixed Value** field on the **Lot Attribute Template** page. However, you must manually update existing records to prevent further errors.



2412.0.0.0

Release Note • 11/29/2024 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Apteian Contract Management extension. To know more, see [What's new in Contract Management, version 2404.0.0.0](#).



2411.0.0.0

Release Note • 11/27/2024 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean Commodity Harvest Planning extension. To know more, see [What's new in Commodity Harvest Planning, version 2402.0.0.0](#).



2410.7.0.0

Release Note • 11/20/2024 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Apteian Quality Control (QCA) for Food and Beverage (BC) extension. For more information, see [What's new in Quality Control \(QCA\), version 2406.0.0.0](#).



2410.6.0.0

Release Note • 11/19/2024 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the Aptean Buffer Orders extension. To know more, see [Highlights of Buffer Orders, version 2401.0.0.0](#).




2410.5.0.0

Release Note • 11/7/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
231735	The system takes longer than expected when selecting lot numbers on the Item Tracking - Select Entries page and returning to item tracking lines in a transfer order.

 **Note**

A fix implemented in the previous version [2408.2.0.0](#) addressed an issue in Bug ID #225019, similar to Bug ID #231735. In the current release, this fix has been enhanced to handle larger data volumes.



2410.4.0.0

Release Note • 10/30/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
236603	The system incorrectly opens the Lot Attribute Values page twice when the lot attribute value selected matches multiple lot attribute values.



2410.3.0.0

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

Enhancements/Modifications

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



2410.2.0.0

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

Enhancements/Modifications

The following changes have been made to ensure compatibility with Business Central, version 26.

- The *Whse.-Create Source Document* object has been made obsolete and replaced with *Sales Warehouse Mgt*, *Purchases Warehouse Mgt*, and *Transfer Warehouse Mgt* in the *WhseCreateSourceDocSubsc02FDW* codeunit.
- The *Power BI Report Spinner Part* object has been made obsolete and replaced with *Power BI Embedded Report Part* on the *AdvancedAttrRoleCenterFDW* page.



2410.1.0.0

Release Note • 9/24/2024 • 1 min read

Enhancements/Modifications

The translation files for the Danish (da-DK) language have been updated with standard texts for better readability.



2410.0.0.0

Release Note • 9/18/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Advanced Attributes extension, you can filter by global lot attribute values on the **Filters Lots in stock by Lot Attributes** dialog upon executing the **Filter by Lot Attributes** action on the **Lot No. Information List** page.



2409.0.0.0

Release Note • 9/4/2024 • 1 min read

Enhancements/Modifications

With this release of the Apteon Advanced Attributes extension, the system enables the configuration and management of advanced item attributes directly within the WMS scanner during warehouse receipt and direct put-away processes. To know more, see [What's new in Apteon Warehouse Management System, version 2402.0.0.0](#).

Integrations

The Apteon Advanced Attributes extension is integrated with the Apteon [Warehouse Management System](#) extension.



2408.2.0.0

Release Note • 8/22/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
225019	The system takes longer than expected when selecting lot numbers on the Item Tracking - Select Entries page and returning to item tracking lines in a transfer order.



2408.1.0.0

Release Note • 8/22/2024 • 1 min read

Enhancements/Modifications

With this release of the Apteon Advanced Attributes 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.



2408.0.0.0

Release Note • 8/21/2024 • 2 min read

Features

With this release of the Aptean Advanced Attributes extension, you can:

- View the global lot attributes and their values on the **Assembly BOM** page associated with the item. To know more, see [Visibility of global lot attributes in assembly BOM lines](#).
- View the global lot attributes and their values on the **Assembly Order** and **Posted Assembly Order** pages. To know more, see [Visibility of global lot attributes in assembly documents](#).
- Modify the lot attributes field values only on the header of the assembly order when the Aptean [Advanced Lot Attributes](#) extension is installed.

UI/UX Changes

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

- The global lot attribute 1 to global lot attribute 8 fields are added to the following:
 - Assembly BOM lines of the **Item Card** page
 - Assembly order lines
 - **General** FastTab of the **Assembly Order** page
 - **Posted Assembly Order** page.
- The **Lot Attribute Requirements** FactBox is added to the **Assembly BOM** page associated with the item card.
- The **Lot Attributes** and **Lot Attribute Requirements** FactBoxes are added to the **Assembly Order** page.
- The **Lot Attributes Values on Consumption**, **Lot Attribute Values on Output** and **Posted Lot Attributes Requirements** actions are added to the **Posted Assembly Order** page.



2407.3.0.0

Release Note • 8/20/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Advanced Attributes extension, the fix implemented in version 2407.1.0.0 to address bug ID #223673 has been reverted. For more information, see [What's new in version 2407.1.0.0](#). This enhancement addresses the issue reported in bug ID #228540.



2407.2.0.0

Release Note • 8/12/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Advanced Attributes extension, the following enhancements have been made to improve the integration with other extensions.

- When assigning lot attribute values to lot numbers, the system checks if the assigned value is allowed according to the items' **Lot Attribute Template** page. Previously, the system did this for lot attribute values defined as global on the **Advanced Attribute Setup** page. Now, this is extended for all lot attributes, regardless of whether they are global or not.
- The system displays the fields related to global lot attributes on the **Purchase Lines**, **Sales Lines**, and **Prod. Order Comp. Lines** list pages.
- The error handling for retrieving global lot attribute field values has been enhanced. This enhancement addresses the issue reported in bug ID #216837.

Resolved issues

The following issue has been resolved in this release.

ID	Description
216837	The system displays incorrect data in the fields related to global lot attributes.



2407.1.0.0

Release Note • 8/7/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
223673	The system fails to display the Unit Price Excl. VAT field value on the sales line and the Direct Unit Cost Excl. VAT field value on the purchase line when a global lot attribute value is selected or entered at the line level of the sales and purchase documents.

Note

The fix previously implemented for this reported issue has been reverted in release version 2407.3.0.0. After a comprehensive analysis, it was determined that the reported bug was not an actual defect. The software functions as designed, and no further corrective actions are necessary.



2407.0.0.0

Release Note • 7/30/2024 • 1 min read

Features

With this release of the Aptean Advanced Attributes extension, the system automatically transfers and synchronizes lot attributes between drop shipment documents when a purchase order is created from a sales order, to support the integration with the Aptean Drop Shipment extension. To know more, see [Integration: Aptean Drop Shipment](#).

Integrations

The Aptean Advanced Attributes extension is integrated with the Aptean Drop Shipment extension. To know more, see [Integrations](#).



2406.1.0.0

Release Note • 7/5/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
216561	Permission error occurs upon executing the Carry Out Action Message action on the Requisition Worksheets page if the user has <i>Basic</i> permission sets.



2406.0.0.0

Release Note • 7/4/2024 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the Aptean [Grower Return](#) extension. To know more, see [What's new in version 2401.0.0.0](#).



2405.0.0.0

Release Note • 6/26/2024 • 1 min read

Enhancements/Modifications

With this release of Aptean Advanced Attributes extension, you can view global lot attribute values on the week forecast order lines and day forecast order lines. To know more, see [What's new in version 2401.0.0.0](#).



2404.1.0.0

Release Note • 6/24/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
208614	An error occurs upon executing the Refresh Production Order action on the Released Production Order page. This issues arises when the Order Tracking Policy field is set to <i>Tracking Only</i> or <i>Tracking & Action Msg.</i> on the Planning FastTab of the associated Item Card page.



2404.0.0.0

Release Note • 4/29/2023 • 1 min read

Enhancements/Modifications

This extension has been updated to define the expiration setup based on item attributes in the Apteau [Expiration Management](#) extension.



2403.5.0.0

Release Note • 6/3/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
208943	Performance issues occur, resulting in slower response times experienced by users, which impact the efficiency of warehouse activities, including lot attribute details in the Apteon Mobile Warehouse app.



2403.4.0.0

Release Note • 5/23/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
205536	An error occurs while installing the Aptean Advanced Attributes extension in Business Central.



2403.3.0.0

Release Note • 5/3/2024 • 1 min read

Enhancements/Modifications

The Swedish translation files have been updated from .Xliff to .XLF format and the duplicate language files have been effectively consolidated into standard file for clarity.



2403.2.0.0

Release Note • 4/30/2024 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean [Trading Board](#) extension. To know more, see [What's new in version 2301.6.0.0](#).



2403.1.0.0

Release Note • 4/3/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
187014	An error occurs when creating a sales invoice with Item Type set as <i>G/L Account</i> in Business Central when <i>BASIC</i> permission sets exist for the user.



2403.0.0.0

Release Note • 4/3/2024 • 1 min read

Enhancements/Modifications

Modifications were made for this extension to accommodate the changes in the Aptean [Producer Certification](#) extension. To know more, see [Release Notes](#) of version 2401.1.0.0.



2402.3.0.0

Release Note • 3/28/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
177741	On a Production Order document, on the Lines FastTab, when a Lot is assigned to the component item for the first output line, Global Lot Attributes cannot be selected for the component item of the second output line on the Prod. Order Component page.



2402.2.0.0

Release Note • 3/20/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
181947	An error occurs when changing the Production Order status from <i>Firm Planned</i> to <i>Released</i> if the order contains multiple lines and item tracking is completed for the component item of all lines.



2402.1.0.0

Release Note • 3/20/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
181886	The attribute values for the component line are not correctly populated on the Lot Attribute Requirements FactBox of the Prod. Order Components page when <i>Family</i> is used as the Source Type in the Released Production Order.



2402.0.0.0

Release Note • 3/6/2024 • 1 min read

Features

With the features added in this release of the Aptean Advanced Attributes extension, you can update the Output Lot Attributes based on the **Inheritable** status of the Components.

UI/UX changes

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

- The **Inheritable** field is added on the **Lot Attribute Template** page and the **Lot Attribute Requirements** FactBox of the **Prod. Order Components** page.
- The **Inheritable** toggle is added on the **Lot Attribute** page.
- The **Inherited** field is added on the **Lot Attributes** FastTab of the **Released Production Order** page.
- The **Predecessor** field is added on the **Lot No. Information List** page.
- The **Predecessor Lots** FastTab is added on the **Lot No. Information Card** page with the following fields:
 - **Lot No.**
 - **Size**
 - **Vendor**
- The **Predecessor Lot Attributes** FactBox is added on the **Lot No. Information Card** page with the following fields:
 - **Attribute Name**
 - **Value**



2401.0.0.0

Release Note • 1/10/2024 • 1 min read

Enhancements/Modifications

Modifications were made for this extension to accommodate the changes in the Aptean Quick Production extension. To know more, see [Highlights of version 2401.0.0.0](#).



2302.0.0.0

Release Note • 12/27/2023 • 1 min read

Enhancements/Modifications

Modifications were made for this extension to accommodate the changes in the Aptean Pricing Matrix extension. To know more, see [Highlights of version 2301.0.0.0](#).



2301.7.0.0

Release Note • 12/27/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
160415	When a negative value is entered in the Quantity field on the Inventory Worksheet page and the Process Records action is executed, the Item Type is incorrectly updated as <i>Positive Adjustment</i> on the Item Journals page.



2301.6.0.0

Release Note • 12/13/2023 • 1 min read

Enhancements/Modifications

Modifications were made for this extension to accommodate the changes in the Aptean [Quality Control Assurance](#) extension (2301.0.0.0).



2301.5.0.0

Release Note • 12/4/2023 • 1 min read

Enhancements/Modifications

Modifications were made for this extension to accommodate the changes in the Aptean [Profiles](#) extension. To know more, see [Highlights of version 2301.0.0.0](#).



2301.4.0.0

Release Note • 11/15/2023 • 1 min read

Resolved issues

The following issues have been resolved in this release:

ID	Description
154269	Performance issue occurs when displaying attributes on the Customers list page with the Promoted checkbox selected.
155107	An error occurs while executing the Get Posted Document Lines to Reverse action on the Sales Return Order with multiple license plates in a single lot.



2301.3.0.0

Release Note • 11/8/2023 • 1 min read

Enhancements/Modifications

Modifications were made for this extension to accommodate the changes in the Aptean [Production Family Profile](#) extension. To know more, see [Highlights of version 2301.0.0.0](#).



2301.2.0.0

Release Note • 11/1/2023 • 1 min read

Enhancements/Modifications

Modifications were made for this extension to accommodate the changes in the Aptean [Inventory Overview](#) extension. To know more, see [What's new in version 2302.0.0.0](#).

Resolved issues

The following issues have been resolved in this release:

ID	Description
156302	The performance time for price calculation was longer than expected.
152348	Selection of lot numbers is allowed on the Item Tracking page of a sales order, even when the attributes do not match those specified for the item on the sales order line.



2301.1.0.0

Release Note • 10/17/2023 • 1 min read

Enhancements/Modifications

Modifications were made for this extension to work seamlessly with the Aptean [Global Trade](#) extension. To know more, see [What's new in version 2301.0.0.0](#).



2.18.118927.0

Release Note • 9/22/2023 • 1 min read

Enhancements/Modifications

Modifications were made for this extension to allow the system to perform additional checks before providing access to the user to change the value of global lot attributes on the **Attributes Setup** page.

The system checks the following documents:

- Sales Orders
- Warehouse Shipments
- Purchase Orders
- Purchase Lines
- Purchase Invoices
- Purchase Receipts
- Warehouse Receipts
- Production Orders
- Production BOMs
- Transfer Orders
- Posted Transfer Shipments
- Posted Transfer Receipts



2.17.116167.0

Release Note • 9/6/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
140621	When turning the Blocked toggle on for a global lot attribute that is in use, the system allows it and fails to display the error message.



2.16.111547.0

Release Note • 8/8/2023 • 1 min read

Resolved Issues

The following issue has been resolved in this release:

ID	Description
128211	When posting a Receipt on the Aptean Mobile Warehouse app, in Business Central, if you open the Item Tracking Lines page from the Purchase Order , the Lot Attributes do not appear in the FactBox.



2.15.108078.0

Release Note • 7/12/2023 • 1 min read

Resolved Issues

The following issue has been resolved in this release:

ID	Description
130473	An error is displayed when changing the Item Category Code field on the Item Card page.



2.14.106221.0

Release Note • 6/28/2023 • 1 min read

Enhancements/Modifications

Modifications were made for this extension to accommodate the changes in the Aptean [Trade Management](#) extension. To know more, see [What's new in version 1.19.106410.0](#).



2.13.96407.0

Release Note • 4/29/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
118425	An error occurs while creating a new item tracking line on the Item Tracking Lines page.



2.12.96132.0

Release Note • 4/29/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
115247	The values are not displayed in the Inherited-From Table ID and Inherited-From Key Value fields on the Attributes FastTab of the Vendor and Customer pages.



2.11.95768.0

Release Note • 4/29/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
118422	An error occurs while posting the Warehouse Receipt for an item assigned with Item Bound Packaging.



2.11.95628.0

Release Note • 4/29/2023 • 1 min read

Enhancements/Modifications

Modifications were made for this extension to work seamlessly with the Aptean [Global Trade](#) extension. To know more, see [Highlights of version 1.0.96728.0](#).



2.10.94072.0

Release Note • 4/29/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
114654	In the Advanced Attributes version 2.4.71327.0 , the Lot Attribute Requirement on Shipment table contains information related to lot attributes and is taken from the sales shipment/return shipment lines, the sales shipment/return shipment lines are deleted. When upgrading to Advanced Attributes version 2.8.89048.0 , the system tries to retrieve the deleted sales shipment/return shipment lines on the Lot Attribute Requirement on Shipment table, and an error message appears.



2.10.93563.0

Release Note • 4/29/2023 • 1 min read

Enhancements/Modifications

Modifications were made for this extension to accommodate the changes in the Aptean [Catch Weight](#) extension. To know more, see [What's new in version 3.1.93082.0](#).



2.9.92293.0

Release Note • 5/8/2023 • 1 min read

Enhancements/Modifications

Modifications were made for this extension to accommodate the changes in the following extensions:

- Apteau [Advanced Pricing](#)
To know more, see [What's new in version 1.10.92682.0](#) and [Integrations](#).
- Apteau [License Plating](#)
To know more, see [What's new in version 1.18.92307.0](#) and [Integrations](#).



2.8.89048.0

Release Note • 4/29/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
108329	On the Customer Attributes page, an error occurs while trying to import the Customer Attribute Value Mapping table via RSS.



2.7.86895.0

Release Note • 4/29/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
102701	An error occurs when changing the status of the Released Production Order with a Co-Product item to Finished Production Order, when the Apteau Advanced Attributes extension is used in conjunction with the Apteau Process Manufacturing extension.



2.6.85129.0

Release Note • 4/29/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
100311	The values in the fields on the Lot Attribute Requirements FastTab are not filled correctly when creating a Production BOM or Production BOM Version using the Copy BOM function.



2.6.83610.0

Release Note • 4/29/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
97544	An error occurs when selecting the allowed values for the global lot attribute fields on the document line.



2.5.80385.0

Release Note • 4/29/2023 • 1 min read

Features

With the features added in this release of the Aptean Advanced Attributes extension, you can

- View and assign global lot attributes on the production document lines. For more details, see [Assign lot attributes to the production document](#).
- Prevent the BOM lines from merging in production order when the same item is used with different global lot attribute values. For more details, see [Production BOM and BOM Version documents line](#).
- View the registered lot attribute and their values after posting consumption and output. For more details, see [Visibility of lot attributes and their values on the Item Ledger](#).
- View and assign global lot attributes on the transfer document lines. For more details, see [Assign lot attributes to the transfer order](#).



2.4.71327.0

Release Note • 4/29/2023 • 1 min read

Enhancements/Modifications

Modifications were made for this extension to work seamlessly with the Apteau [Telemetry](#) extension. To know more, see [Highlights of version 1.0.71129.0](#).



2.3.68845.0

Release Note • 4/29/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
83535	The fields are not editable on the Show Lot Attributes page.



2.2.65082.0

Release Note • 4/29/2023 • 1 min read

Enhancements/Modifications

Modifications were made for this extension to work seamlessly with the Aptean [Advanced Lot Attribute](#) extension. To know more, see [Highlights in version 1.0.65177.0](#).



2.1.63623.0

Release Note • 4/29/2023 • 1 min read

Resolved issues

The following issues have been resolved in this release:

ID	Description
52768	The Clear Lot Attributes Filter action is not working on the Lot No. Information List page.
52771	An error message appears when specifying the value ' <i>Blank</i> ' for any lot attribute.
52776	The Clear Lot Attributes Filter action is not working on the Lot No. List page.
69496	An error message appears when assigning multiple lot numbers to the lines on the Item Tracking Lines page.
70265	Due to the validation check, the same date cannot be used for more than one customer/vendor.



2.0.58246.0

Release Note • 4/29/2023 • 1 min read

Features

The features in this release are listed below:

- Item Category Codes are linked to default lot attributes and their values. For more details, see [here](#).
- Copy the lot attributes to the item card and synchronize them when selecting item category code on item.
- Set up Global Lot Attributes. For more details, see [here](#).
- View and assign global lot attributes on the purchase & sales document lines. For more details, see [here](#).
- The global lot attributes are inherited when creating warehouse documents via the sales & purchase order. For more details, see [here](#).
- Copy global lot attributes from document line on the purchase and sales order with the use of copy functionality. For more details, see [here](#).



1.11.55449.0

Release Note • 4/29/2023 • 1 min read

Enhancements/Modifications

Minor technical changes were made to keep our apps in line with the *updated* coding guidelines for Business Central.



1.11.48964.0

Release Note • 4/29/2023 • 1 min read

Enhancements/Modifications

Minor technical changes were made to keep our apps in line with the *updated* coding guidelines for Business Central.



1.10.46920.0

Release Note • 4/29/2023 • 1 min read

Enhancements/Modifications

A localized version of Advanced Attributes extension is made available for the Switzerland market with the addition of German language code [de-CH].

Resolved issues

The following issue has been resolved in this release:

ID	Description
32301	On changing the lot attribute values manually, the changes are not reflected in the audit trail entries.



Introduction

Article • 4/29/2023 • 2 min read

With the Apteon Advanced Attributes (AAT) extension, you can now create and manage custom attributes specific to your industry, domain, or organizational structure. Whether it's capturing additional customer information, tracking unique product specifications, or defining specialized workflow steps, this extension provides the flexibility to adapt software systems to the exact needs of the business.

You can set up user-defined attributes linked to items, vendors, customers, and lots, which can then be accessed in list views and FactBoxes to aid in informed decision-making. Additionally, these attributes can be utilized in Microsoft Power BI for further data analysis. These attributes can be used for information, filtering, and reporting. The item, customer, and vendor attributes are linked directly to the master record and are not stored in history.

You can also store the lot attributes per lot number and use them for specifying lot characteristics. These attributes will be shown on pages where you select a lot number.

With the features available in this extension, you can:

- **Customize your data:** Tailor your items, customers, vendors, and lot attributes to your specific needs.
- **Easily find information:** Use filters and search functions to quickly locate the data you need on list pages.
- **Generate clear reports:** Aggregate your data for reporting purposes that are both valuable and easy to understand.
- **Maximize flexibility:** Group attributes and assign them to different lots to create the most effective system for your needs.



Setup

Article • 7/30/2024 • 1 min read

The following topics explain the required setup.

- [Manage permission sets](#)
- [Set up lot attributes](#)
- [Set up attribute template for item lots](#)
- [Set up attribute template for item category lots](#)



Manage permission sets

Article • 7/23/2024 • 3 min read

Permission sets in Business Central define a user's access level to various features and data within this extension.

We provide the following system permission sets:

- Direct
- Indirect

Direct permission sets

Users with this permission set can perform specific actions directly without requiring additional approvals or workflows. These sets include permissions to read, modify, delete, and create data.

The direct permission set ID for this extension is *ADVANCEDATTRFDW*.

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 *ADVATTRBASICFDW*.

User-defined permission sets

In addition to the system permission sets we provide, you can create new permission sets or copy system permission sets and modify or delete access to specific entities according to your requirements. For more information, see [Assign permissions to users and groups](#).

Assign a permission set



1. Select the Search icon , enter **Users**, and then choose the related link.
The **Users** list page opens.
2. Navigate to the username for which you want to assign the permission set and select it.
The **User Card** page opens.



3. On the **User Permission Sets** FastTab, in the **Permission Set** field, enter the valid permission set for this extension.

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




Set up lot attributes

Article • 4/22/2026 • 2 min read

You can set up lot attributes, such as grade, color, or ripeness, to apply to lots. The lot attributes can have different values. These lot attributes and values are used for reporting purposes.



1. Select the Search icon , enter **Lot Attributes**, and then choose the related link.
The **Lot Attributes** list page opens.
2. Select **New**.
The **Lot Attribute** card page opens.
3. Enter the required information in the following fields:

Field	Description
Name	Enter the name of the lot attribute, for example, <i>Color</i> .
Type	<p>Select the type of the lot attribute. The available options are:</p> <ul style="list-style-type: none"> • Option: You can define lot attribute values for the lot attribute by selecting the Lot Attribute Values action. For example, for the lot attribute, <i>Grade</i>, you can create attribute values such as <i>A</i>, <i>B</i>, and <i>C</i> on the Lot Attribute Values page. • Text: You can enter text values in the Fixed Value field on the Lot Attribute Template page. • Integer: You can enter integer values in the Fixed Value field on the Lot Attribute Template page. • Decimal: You can enter decimal values in the Fixed Value field on the Lot Attribute Template page. • Date: You can enter date values in the Fixed Value field on the Lot Attribute Template page. • Lookup: You can select a specific table in the Lookup Table No. field and apply filters to the selected table to filter the lot attribute to specific values using the Lookup Table Filters action. For example, to filter vendors from a specific country you can select 23 (Vendor) in the Lookup Table No. field and then apply a filter using the Lookup Table Filters action and select <i>AL</i> (Albania) in the Country/Region Code field.
Lookup Table No.	Select the table from which the system must retrieve lot attribute values. You can only select tables that contain one primary key.



	This field is visible only when the Type field value is set to <i>Lookup</i> .
Blocked	Turn on the toggle if the related record is blocked from being posted in a transaction. For example, a lot that is declared defective or a lot that is placed in quarantine.
Promoted	Turn on the toggle if you want the lot attribute to be promoted on the Lot Attributes page.
Copy to Template	<p>Select whether the lot attribute must be copied to items or item categories when using the Copy Lot Attributes action on the Lot Attribute Template page. The available options are:</p> <ul style="list-style-type: none"> • Blank • <i>Item</i> • <i>Item Category</i> <p>This field is visible only when the Type field value is set to <i>Lookup</i> and editable only when the Lookup Table No. field has a value.</p>
Mandatory	Select if entering a value for this lot attribute is mandatory at posting. If set to <i>At Posting</i> , the system checks on an immediate basis whether the value is present for the lot.
Inheritable	Turn on the toggle if the lot attribute must be inherited during the production process. This toggle is visible only when the Type field value is set to <i>Option</i> .
Values	Specifies the lot attribute values defined on the Lot Attribute Values page. This field is visible only when the Type field value is set to <i>Option</i> .
Unit of Measure	Enter the unit of measure of the lot attribute value. This field is visible only when the Type field value is set to <i>Integer</i> or <i>Decimal</i> .
Min. Value	Enter a minimum value requirement for the lot attribute. This field is visible only when the Type field value is set to <i>Integer</i> , <i>Decimal</i> , or <i>Date</i> .
Max. Value	Enter a maximum value requirement for the lot attribute. This field is visible only when the Type field value is set to <i>Integer</i> , <i>Decimal</i> , or <i>Date</i> .



 Note

If the **Type** field value is set to *Lookup*,

- You cannot set up the lot attribute as a global lot attribute.
- The field value cannot be changed when associated items are used in open documents.

The **Lookup Table No.** field value cannot be changed when the lot attribute is in use in lot attribute templates or open documents.

4. You can select the following actions as required:

Action	Description
Lot Attribute Values	Define lot attribute values on the Lot Attributes page. This action is available only when the Type field value is set to <i>Option</i> .
Translations	Define translations for the lot attribute.
Lookup Table Filters	Add filters to the table selected in the Lookup Table No. field to filter the lot attribute to specific values. This action is visible only when the Type field value is set to <i>Lookup</i> . The applied filters cannot be deleted when the lot attribute is in use in lot attribute templates or open documents.
Update Lot Attribute Templates	Update lot attribute templates in items or item categories with lot attributes based on the Copy to Template field value. For more information, see Update lot attribute templates .
Source Mapping	Configure automatic mapping rules that define how and when lot attribute values or lot attribute filter requirements are populated from source documents. For more information, see Lot attribute source mapping .

The lot attribute is set up.




Set up lot attribute templates for item lots

Article • 10/22/2025 • 2 min read

You can set up an attribute template so that every time a lot number of that item is created, a specific set of lot attributes is populated.



1. Select the Search icon , enter **Items**, and then choose the related link.
The **Items** list page opens.
2. Select the **No.** field for any item for which the lot attribute template should be set up.
The **Item Card** page opens.
3. In the **Hierarchy Code** field you can apply a lot attribute hierarchy template. For more information, see [Apply hierarchy templates to item or item category lots](#).
4. On the action bar, select **Item > Lot Attributes Template**.
The **Lot Attribute Template** page opens.
5. Enter the required information in the following fields:

Field	Description
Attribute	Select a lot attribute.
Fixed Value	Select a default lot attribute value for this item. This field is blank if the Allowed Values field value exists. If the Type field value is set to <i>Lookup</i> on the associated Lot Attribute page, the system filters lot attribute values according to the set up. For more information, see Set up lot attributes .
Allowed Values	Specifies the allowed lot attribute values. This field is blank if the Fixed Value field value exists. You can use the Allowed Lot Attribute Values action to define the allowed lot attribute values.
Values Priority Exist	Specifies if a priority for the allowed lot attribute values exist. You can use the Lot Attributes Values Priority action to define the priority for the allowed lot attribute values. For more information, see Set up priority lot attribute values .
Level	Specifies the hierarchy level of the lot attribute in the selected lot attribute hierarchy template. For more information, see Apply hierarchy templates to item or item category lots .



6. Select the **Copy Lot Attributes** action to copy all the lot attributes with the **Copy to Template** field value set to *Item* on the associated **Lot Attribute** page. For more information, see [Set up lot attributes](#).
The lot attribute template is set up.



Set up lot attribute templates for item category lots

Article • 10/22/2025 • 4 min read

You can set up an attribute template so that every time a lot number of that item group is created, a specific set of lot attributes is populated.



1. Select the Search icon , enter **Item Categories**, and then choose the related link. The **Item Categories** page opens.

2. Select an item category for which the lot attribute template should be set up.



3. Select the AssistEdit button .

4. Select **View**.

The **Item Category Card** page opens.

5. On the action bar, select **More options** > **Related** > **Lot Attributes Template**.

The **Lot Attribute Template** page opens.

6. In the **Hierarchy Code** field, you can apply a lot attribute hierarchy template. For more information, see [Apply hierarchy templates to item or item category lots](#).

7. Enter the required information in the following fields:

Field	Description
Attribute	Select a lot attribute.
Fixed Value	Select a default lot attribute value for this item category. This field is blank if the Allowed Values field value exists. If the Type field value is set to <i>Lookup</i> on the associated Lot Attribute page, the system filters lot attribute values according to the set up. For more information, see Set up lot attributes .
Allowed Values	Specifies the allowed lot attribute values. This field is blank if the Fixed Value field value exists. You can use the Allowed Lot Attribute Values action to define the allowed lot attribute values.



Values Priority Exist	Specifies if a priority for the allowed lot attribute values exist. You can use the Lot Attributes Values Priority action to define the priority for the allowed lot attribute values. For more information, see Set up priority lot attribute values .
Level	Specifies the hierarchy level of the lot attribute in the selected lot attribute hierarchy template. For more information, see Apply hierarchy templates to item or item category lots .

8. Select the **Copy Lot Attributes** action to copy all the lot attributes with the **Copy to Template** field value set to *Item Category* on the associated **Lot Attribute** page. For more information, see [Set up lot attributes](#).

The lot attribute template is set up.

 Note

If the lot attribute isn't set with the option type, the user can set only fixed values. It is not allowed for integer, date, decimal, and text type, to set up a list of options or allowed values.



Set up priority lot attribute values

Article • 2/4/2025 • 1 min read

You can define the priority of allowed lot attribute values to indicate the scale or quality for an item or an item category.

For example, if *Banana* is an item, you can set up priorities for allowed lot attribute values (such as, *Yellow* with 1, *Yellow-green* with 2, *Green* with 3, and *Brown* with blank) to indicate quality levels.

To set up priority lot attribute values, follow these steps:

1. On the **Item Card** or **Item Category Card** page, on the action bar, select **Lot Attributes Template**.
The **Lot Attribute Template** page opens.
2. On the **Lot Attribute Template** page, on the action bar, select the **Priority Lot Attribute Values** action.
This action is available only when the allowed lot attribute values are defined.
The **Lot Attributes Values Priority** page opens.
3. Enter the required information in the following fields:

Field	Description
No.	Specifies the item or item category number.
Lot Attribute Value	Specifies the allowed lot attribute value.
Priority	Enter the priority number for the lot attribute value. You can assign the same priority number for more than one lot attribute value to indicate that they are on the same level.

Note

- If you select a lot attribute value for which a priority is assigned as the lot attribute requirement, you cannot choose lots for which a priority is not assigned.
- The priority defined for lot attribute values on an item category level impacts the priority of lot attribute values for associated items. This implies that if the defined values and their priority originate from the item category level, they cannot be overruled on the item level.



Manage lot attribute hierarchy templates

Article • 10/22/2025 • 1 min read

You can create lot attribute hierarchy templates, define parent-child relation levels, and specify allowed lot attribute values per level. For more information, see [Set up lot attribute hierarchy templates](#).

You can apply these lot attribute hierarchy templates to item or item category lots. For more information, see [Apply hierarchy templates to item or item category lots](#).

When you assign lots in purchase documents and output lines of production orders, the system automatically inherits lot attributes defined in the hierarchy template associated with the item on the **Lot Attribute Values** page. For more information, see [To incoming purchase documents](#) and [Output lines of the production order](#).

When the system filters lots in sales documents, component line of production orders, and transfer orders, it automatically filters lot attributes as defined in the hierarchy template associated with the item on the **Lot Attribute Filter Requirements** page. For more information, see [To outgoing sales documents](#), [Component lines of the production order](#), and [Assign lot attributes to transfer orders](#).

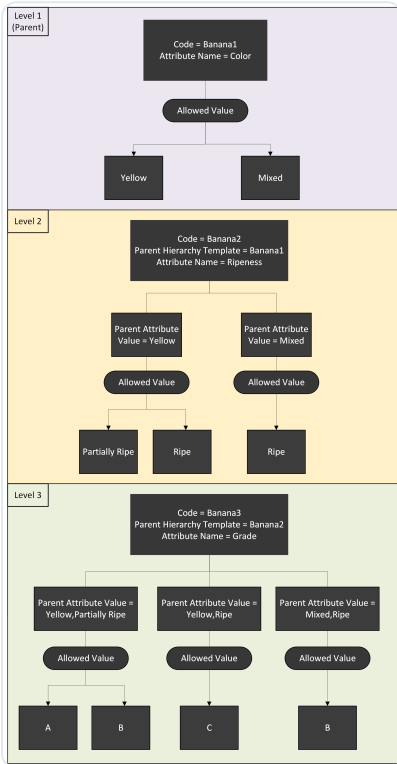


Set up lot attribute hierarchy templates

Article • 10/22/2025 • 3 min read


You can create lot attribute hierarchy templates, define parent-child relation levels, and specify allowed lot attribute values per level.

The following image displays an example of a lot attribute hierarchy.



To set up a lot attribute hierarchy template, follow these steps:



1. Select the Search icon , enter **Lot Attribute Hierarchy Templates**, and then choose the related link. The **Lot Attribute Hierarchy Templates** list page opens.
2. On the action bar, select **New**. The **Lot Attribute Hierarchy Template** card page opens.
3. On the **General** FastTab, enter the required information in the following fields:

Field	Description
Code	Enter a code for this hierarchy template.
Description	Enter a description for this hierarchy template.



Attribute Name	Select the lot attribute you want to define in this hierarchy template. The system only displays lot attributes with the Type field value set to <i>Option</i> .
Parent Hierarchy Template	Select the hierarchy template you want to set as a parent to this hierarchy template. You can leave this field value blank if this hierarchy template is the highest parent level.
Level	Specifies the hierarchy level of this template. This field value is set to 1 if this hierarchy template is the highest parent level.

4. On the **Hierarchy Value Mapping** FastTab, in a new line, enter the required information in the following fields:

Field	Description
Parent Attribute Value	Select a lot attribute value associated with the parent hierarchy template. This field value is set to blank for level 1 (highest parent level) hierarchy templates.
Allowed Value	Select the allowed value associated with the parent lot attribute value.

You can add more lines to define allowed values for parent lot attribute values as required.

The lot attribute hierarchy template is created.

The system arranges the templates on the **Lot Attribute Hierarchy Templates** list page based on the hierarchy for better visibility.



Apply hierarchy templates to item or item category lots

Article • 10/22/2025 • 1 min read

To apply a lot attribute hierarchy template to items or item category lots, follow these steps:

1. On the **Lot Attribute Template** page, in the **Hierarchy Code** field, select the **AssistEdit** button.
The system displays only the highest parent level hierarchy templates on the **Lot Attribute Hierarchy Templates** page.
2. Select the hierarchy template you want to apply to the lot attribute template and then select **OK**.
The system inherits all the attributes and their associated allowed values as defined in the selected hierarchy.
3. On the lot attribute template line with the **Level** field value set to *1*, select the **Fixed Value** field value.
The system updates the values in the **Allowed Values** field for each lot attribute template line that follow in the hierarchy.
Repeat this step to select fixed values for the other lot attribute template lines in ascending order of levels.

Note

- The system automatically applies the hierarchy applied to lots on an item category level to all the items associated with the item category.
- The hierarchy applied to lots on an item level precedes the setup on the item category level.

Then, you can assign lot attribute hierarchy to items or item categories. The system ensures that only allowed lot attribute values are selected for each level as defined in the hierarchy associated with the item in documents.



Update lot attribute templates

Article • 5/14/2025 • 1 min read

You can update lot attribute templates for items or item categories with lot attributes based on the **Copy to Template** field value as follows:

1. Navigate to the **Update Lot Attribute Templates** page.
2. On the **Lot Attributes** FastTab, enter the required information in the following fields:

Field	Description
Copy to Template	Select whether the lot attributes must be copied to items or item categories. The available options are: <i>Item</i> and <i>Item Category</i> .
Lot Attribute Filter	Select the lot attribute you want the system to copy in the lot attribute templates for items or item categories. If this field value is blank, the system copies all lot attributes, based on the Copy to Template field value, for items or item categories.

3. If the **Copy to Template** field value is set to *Item*, add filters on the **Filter: Item** FastTab to specify to which items the system must copy the lot attributes.
If no filters are applied, the system copies the lot attributes to all items.
4. If the **Copy to Template** field value is set to *Item Category*, add filters on the **Filter: Item Category** FastTab to specify to which item categories the system must copy the lot attributes.
If no filters are applied, the system copies the lot attributes to all item categories.
5. Select **OK**.
The system updates the lot attribute templates for items or item categories based on the filters applied.



Define lot attribute categories

Article • 4/22/2026 • 3 min read

Lot attribute categories allow you to group and classify lot attributes into logical categories such as *Heavy Metals*, *Microbial*, and *Physical*. You can assign categories to lot attributes to enable enhanced data organization and filtering capabilities in the profile rules UI.

To define lot attribute categories, follow these steps:



1. Select the Search icon , enter **Lot Attribute Categories**, and then choose the related link.

The **Lot Attribute Categories** page opens.

2. Select **New** to create a new category record.

3. In the **Code** field, enter a unique identifier for the category.

4. In the **Name** field, enter a descriptive name for the category.



5. Select the Search icon , enter **Lot Attributes**, and then choose the related link.

The **Lot Attributes** page opens.

6. Select the lot attribute you want to categorize.

7. In the **Attribute Category** field, select the category to assign to the lot attribute.

Note

You can use the assigned categories to group and filter lot attributes in the profile rules UI.



View QA status on lot attributes

Article • 4/22/2026 • 2 min read

The **QA Status** field on the **Lot Attribute Value Selection** page tracks the QA testing outcome for each lot attribute. It provides a quick indicator of whether a lot attribute has passed quality testing. The field is automatically populated when QA test results are linked to a lot attribute, and can also be manually set by users.

To view and set QA status on lot attributes, follow these steps:



1. Select the Search icon , enter **Items**, and then choose the related link.

The **Item List** page opens.

2. Select the item with lot tracking to view its lot attribute values.

3. Navigate to the lot attribute values for the relevant lot.

The **Lot Attribute Value Selection** page opens.

4. Review the **QA Status** field, which displays the current QA testing outcome for each lot attribute.

Note

When a lot attribute value is populated through QA testing, the **QA Status** field is automatically set based on the QA test result.

5. To manually set the QA status, select the **QA Status** field and choose the appropriate status from the dropdown.

6. Close the page to save your changes.



Select spec-compliant lots

Article • 4/22/2026 • 3 min read

The **Spec-Compliant Lot Selection** page allows you to select only specification-compliant lots for customer orders. It filters available lots based on customer specification profile criteria, displaying lot compliance status with detailed attribute comparison. You can use *Strict* mode to show only compliant lots, or *Show All* mode to view all lots with override approval for non-compliant selections.

To select spec-compliant lots for a sales order, follow these steps:



1. Select the Search icon , enter **Sales Orders**, and then choose the related link.

The **Sales Orders** list page opens.

2. Select the sales order line that requires lot assignment.

3. Select **Item Tracking Lines** to open the item tracking page.

The **Item Tracking Lines** page opens.

4. Select **Spec-Compliant Lot Selection**.

The **Spec-Compliant Lot Selection** page opens, pre-filled with the customer and item from the sales order line.

5. In the **Spec Profile** field, select the customer specification profile to use for filtering.

Note

The system auto-selects the profile using priority logic: *Specific Item > Filter Group > All Items*.

6. In the **Compliance Mode** field, select the filtering mode. The available options are:

- *Strict*: Displays only lots that meet all specification criteria. Available to all users.
- *Show All*: Displays all lots with compliance indicators. Non-compliant lots are marked with warning icons and require override approval. Available to privileged users only.

7. Review the **Lot Compliance** FactBox to view the selected lot's detailed attribute compliance, including required values, actual values, and pass/fail indicators.

8. Select one or more compliant lots and enter the quantity to allocate for each.

Note

The system validates that the total allocated quantity does not exceed the sales order line quantity.

9. If selecting a non-compliant lot in *Show All* mode, confirm the override and enter an override reason when prompted.



 Note

Override approvals are logged with user ID, timestamp, and reason text.

10. Select **OK** to return the selected lots to the sales order line.



Visibility of lot attributes


Article • 6/21/2023 • 4 min read

When a lot number is assigned, you can select it in outgoing documents for item tracking. Lot attributes associated with the lot number are visible in various outgoing documents, providing additional information about the lot. There are several methods available to display these lot attributes.

Set lot attribute to Promoted

A promoted lot attribute is displayed on the **Lot No. List** page for a quick overview of the lots and the attributes that are linked to it. It is possible to show a maximum of five attributes on the **Lot No. List** page. The lot attribute must be configured as promoted before it is displayed on the **Lot No. List** page.



1. Select the Search icon , enter **Lot attributes**, and then choose the related link.
The **Lot Attributes** list page opens.
2. On the action bar, select **Edit List**.
3. Select the **Promoted** checkbox for the lot attribute, which should be promoted.

The selected attribute is now promoted.

Note

You cannot set a promoted attribute as a global lot attribute.

Visibility of lot attributes in outgoing documents

The visibility of previously registered lot attributes is shown in different outgoing documents. The **Lot No. List** page can be opened via the following outgoing documents:

- Sales orders
- Warehouse shipments
- Purchase return orders
- Component lines
- Transfer shipments

In this instruction, the visibility is shown via a sales order.

1. Navigate to the **Item Tracking Lines** page from the **Sales Order** page.



2. On the **Lot No.** field, select the AssistEdit button to open the **Lot No. List** page.

The promoted attributes are shown on the **Lot No. List** page and all the lot attributes are shown in the FactBox pane.

3. Select **OK**.

The lot attributes that are added to the lot number are shown in the FactBox pane also on the **Item Tracking Lines** page.

Visibility of lot attributes in inventory pick document



1. Select the Search icon , enter **Inventory picks**, and then choose the related link.


The **Inventory Picks** list page opens.

2. Select the **No.** field for the required order.

The **Inventory Pick** card page opens.

3. On the **Lines** FastTab, select the AssistEdit button in the **Lot No.** field to open the **Lot No. List** page.

Note

If the **Lot No.** field is not visible in the lines, it is possible to add it by selecting **Settings**  (assets/BC-icons/settings-cog-icon.png) > **Personalize**. The promoted attributes are shown on the **Lot No. List** page and all the lot attributes are shown in the FactBox pane.



Lot attribute source mapping

Article • 4/22/2026 • 6 min read

The lot attribute source mapping feature defines how lot attribute values and lot attribute requirements are automatically populated from business documents. It allows you to link a lot attributes to a specific field in a purchase order, production order, or sales order, so that the system can copy the relevant value without manual input.

Set up automatic inheritance of lot attribute values

Lot attributes are used to store additional information for lot-tracked items, such as supplier details, order references, or production data. By default, these values must be entered manually when a lot number is assigned.

This feature enables you to configure lot attributes, allowing their values to be automatically inherited from the source document, such as a purchase order or production order. Once configured, the system copies values from the selected document into the corresponding lot attributes at the moment the lot number is assigned, reducing manual entry and improving data consistency.

Important

When a sales order is created through the Apteon [Contract Management](#) extension or a released production order is created through the Apteon [Shop Floor Production \(BC\)](#) extension, lot attribute source mapping is not applied. The system does not support automatic inheritance of lot attributes in these scenarios, and values must be reviewed or entered manually if required.

To configure automatic inheritance for a lot attribute, follow these steps:

1. Open the **Lot Attributes** page.
2. Select a lot attribute of a supported type. Automatic inheritance can be configured for the following attribute types:
 - Text
 - Integer
 - Decimal
 - Date
 - Lookup

Note

Option attributes do not support automatic inheritance.



3. On the action bar, select **Source Mapping**. The **Lot Attribute Source Mapping** page opens.
4. Fill in the required field values. Each line represents a mapping rule that directs the system where to pick a value from, when to copy it, and which lot attribute it applies to.

Field	Description
Entry No.	Specifies the processing sequence when multiple mappings exist for the same lot attribute and source document. Lower numbers are processed first.
Lot Attribute ID	Specifies the unique identifier of the lot attribute. This value is system-assigned and is used internally to link the mapping to a specific lot attribute.
Lot Attribute Name	Specifies the name of the lot attribute that receives the value. This helps to identify which attribute is being populated from the source document.
Lot Attribute Type	Specifies the data type of the lot attribute, such as decimal, text, integer or date.
Source Document	Select whether the value should be copied from a purchase, released production, or sales order.
Target Table	Select the required value to define when the system attempts to copy the value. The available options are: <i>Lot Attribute Value</i> : Use this option for purchase and released production orders. The system updates the lot attribute value when the lot number is assigned and whenever the selected field value changes. <i>Lot Attribute Filter Requirement</i> : Use this option for sales orders. The system updates the lot attribute requirement whenever the selected field value changes. This is the only available option for sales orders.
Source Table ID	Specifies the table that provides the source value for the lot attribute. The selected table determines whether the value is taken from the document header or from a document line. The available tables depend on the selected document source: <ul style="list-style-type: none"> • Purchase order: <i>Tables 38 (Purchase Header), 39 (Purchase Line), 336(Tracking Specification)</i>. • Production order: <i>Tables 5405, 5406, 336(Tracking Specification)</i>. • Sales order: <i>Tables 36 (Sales Header) and 37 (Sales Line)</i>.
Source Table Name	Specifies the name of the source table, such as sales line or sales header, to clarify where the value originates.
Source Field ID	Select the field whose value should be copied into the lot attribute. The available fields depend on the selected lot attribute type. For example, when the lot attribute is of type <i>Date</i> , it can only be mapped to a field of type <i>Date</i> .



Source Field Name	Specifies the name of the source field whose value is copied into the lot attribute, such as amount, line no., or order date.
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5. Repeat the steps for other lot attributes, if required.

When a lot number is assigned to a purchase or production document, the configured lot attributes are filled automatically based on the defined mapping. When an item is selected on a sales order line and/or a field value is modified on a sales header or sales line, the lot attribute requirement values are filled automatically based on the defined mappings.

Important

When copying *Date* or *Decimal* values into a *Text* lot attribute, the value is stored using the language and regional settings of the user who creates the lot. This results in displaying values in a different format, which can lead to incorrect results when filtering or searching on lot attribute values.

Automatic lot attribute assignment on purchase and production orders

To automatically assign lot attribute values on purchase and production orders, follow these steps:

1. Create a purchase order or production order.
2. Add a lot-tracked item with a lot attribute template.
3. Open **Item Tracking Lines** page.
4. Assign a new lot number by executing the **Assign Lot No.** action.

The system creates the lot and inserts lot attributes based on the item's lot attribute template. When the lot number is created, the system:

- Skips attributes with fixed values or unsupported types.
- Copies value from mapped source fields based on the document type.
- Evaluates attributes with conditions and copies values from the relevant source tables.
- Stores the values as lot attribute values for the lot.

Note

Lot attributes with fixed values in the item template are not copied from source documents.



Update lot attribute values on modification

When a mapped source field value is modified on a purchase order or production order after a lot has already been assigned, the system automatically updates the corresponding lot attribute values. This applies only when the **Target Table** field value on the **Lot Attribute Source Mapping** page is set to *Lot Attribute Value*.

The system updates only lot attributes that meet the following conditions:

- The value was originally populated through a source mapping.
- An active lot attribute source mapping exists for the modified field.

Multiple source mappings for a lot attribute

If multiple source mappings are configured for the same lot attribute and source document, the system processes them in a defined order to determine which value to assign.

- If multiple source mappings are configured for the same lot attribute and the same source document, the system processes them in the **Entry No.** field value order on the **Lot Attribute Source Mapping** page.
- The system attempts to assign the value using the first mapping.
- If no value is found or the field value is blank, the system continues with the next mapping.
- When a value is assigned, the system stops further processing for that lot attribute.

For example, if a lot attribute is mapped to the requested receipt date from the purchase header in entry 1, and the planned receipt date from the purchase line in entry 2, then:

- If the **Requested Receipt Date** field value is blank in the purchase header, the system attempts to assign the planned receipt date from the purchase line.
- If a value is found, it is applied, and no further mappings are evaluated.

Automatic lot attribute requirement assignment on sales orders

When you add an item to a sales order line or modify any of the sales order fields (header or line) the system automatically applies sales order-related values as lot attribute requirements. These requirements restrict lot selection so that only lots matching the required characteristics can be assigned to the sales line.

Field values such as **Planned Delivery Date** and **Customer City** are inherited from the sales order and enforced during lot assignment.



Automatic creation of lot attribute requirements

When an item is inserted on a sales order line, the system:

- Creates lot attribute requirement records based on the item's lot attribute template.
- Evaluates each applicable lot attribute individually.

The system automatically sets the following values:

- The **Production Date** field value is updated with the planned delivery date from the sales line.
- The **Customer City** field value is updated with the sell-to city from the sales order header.

Update lot attribute requirements on modification

When a mapped source field value is modified on a sales order header or line before a lot is assigned, the system automatically updates the corresponding lot attribute requirement. This applies only when the **Target Table** field on the **Lot Attribute Source Mapping** page is set to *Lot Attribute Filter Requirement*.

The system updates only lot attributes that meet the following conditions:

- The value was originally populated through a source mapping.
- An active lot attribute Filter Requirement source mapping exists for the modified field.

Restrictions after lot assignment

After a lot is assigned to the sales line, it is no longer possible to change the lot attribute requirement values, as they might conflict with the lot attributes of already assigned lots. This is an existing business rule in the Aptean Advanced Attribute extension that also applies to lot attributes that have source mapping set up. If a lot number is already assigned in the tracking of a sales order, and the user would modify a field that is set up as a source mapping, an error is displayed indicating the lot number should be removed from the tracking line.

Important

- Source mapping is not applied when a sales order is created from contracts, quotes, or blanket orders.
- If a lot attribute requirement already contains a value, changes to the source document field automatically update the requirement. This does not apply to fixed values or contracts.



Assign lot attributes to a lot number

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There is a possibility to assign lot numbers to any Item in an incoming or outgoing document for item tracking.

Lot Attributes can be linked to Lot Numbers that provide extra information about the specific lot. The Lot Attributes can be used for reporting purposes.

The item reclassification journal can be used for several reasons, such as performing "system transfers" by reclassifying bin and location codes. When using this journal, it is possible to specify a new lot number in the Item Tracking Lines. This new lot number will take the place of the lot number selected in the Lot No. field. When a new lot number is created or assigned, the Lot Attributes will be copied from the original lot number to the new lot number. When selecting an existing lot number instead of creating a new lot number, the Lot Attributes will not be copied from the original lot to the selected existing lot.

Assign lot numbers

The visibility of previously registered Lot Attributes is shown in different incoming documents. The item tracking can be opened via the following incoming documents:

- Purchase order
- Warehouse receipt
- Production order
- Sales return order
- Incoming transfer order
- Assembly order

In this instruction, it shows the visibility via a Purchase Order.

1. Navigate to the **Item Tracking Lines** page from the **Purchase Order** page. Before it is possible to assign lot attributes to a lot, the lot number has to be assigned to the item.
2. On the action bar, select **Home > Assign Lot No.**
A Lot No. Information Card is generated automatically.

Reuse of lot numbers in the incoming purchase documents

Reuse of already created lot numbers in incoming purchase and sales documents is possible.

Based on the [Global Lot Attribute](#) values on the document line, the system filters the lot numbers and shows only those lot numbers which have matching values.



An error occurs, while entering the non-match values to an existing lot number.

This applies for all incoming documents with lot numbers.

Assign lot attributes

When a lot number is assigned to Item, the Lot Attributes can be assigned to the lot number.

1. For the selected purchase order on the **Item Tracking Lines** page, select **Home > Assign Lot Attributes**. The **Lot Attribute Values** page opens.
2. Select **Attribute** field and select the lot attribute from the list, e.g., "pH" created on the **Lot Attribute** page.
3. In the **Value** field, enter the value based on the selected lot attribute, e.g., "7".

Note

If the minimum and maximum value requirements are defined for a lot attribute, you must enter a value that adheres to the defined requirements. For more information, see [Set up lot attributes](#).

4. Select **OK** to apply the changes.

SOURCE	ITEM TRACKING	UNDEFINED
Purchase Line		
Quantity	15	
Qty. to Handle	15	
Qty. to Invoice	15	

Item Tracking Code	LOTALL	Description	Lot specific tracki...
AYAL...	AYAL...		
SERI...	SERI...		
NO.	SERIAL NO.	LOT NO.	QUANTITY (BASE)
Yes	Yes	LOT-000019	15

ATTRIBUTE NAME	VALUE
pH	7

The assigned lot attributes are shown in the FactBox pane with the added Lot Attributes and values per Lot No. on the **Item Tracking Lines** page.


There are different ways to show the Lot Attributes and add, edit, or delete these. The following topics describes the different ways.



Add or edit lot information on the lot information card

There are different ways to show the Lot Attributes and add, edit, or delete these. The following two topics describe the same. Via the Lot information Card, there is a possibility to go to the Lot Attributes. When there is information for the specific lot, it is possible to register these via the Lot Information Card as a Lot Attribute.




1. Select the Search icon , enter **Purchase Order**, and then choose the related link.
The **Purchase Orders** list page opens.
2. Select the **No.** field for the required purchase order.
The **Purchase Order** card page opens.
3. On the **Lines** FastTab, on the action bar, select **More options**.
The **Line** menu appears.
4. Select **Line > Item Tracking Lines**.
The **Item Tracking Lines** page opens.
5. On the action bar, select **Line > Lot No. Information Card**.
The **Lot No. Information Card** page opens.
6. On the action bar, select **Related > Lot No. > Attributes**.
The **Lot Attribute Values** page opens. It is possible to add, change, and delete lot attributes and values on this page.

Add or edit lot information on the inventory put-away

There are different ways to show the Lot Attributes and add, edit, or delete these. The following topic describes the same.

During the receiving process it is possible to add or edit Lot Attributes. Via the Inventory Put-Away it is possible to go to the Lot Attributes.



1. Select the Search icon , enter **Inventory put-aways**, and then choose the related link.
The **Inventory Put-aways** list page opens.
2. Select the **No.** field for the required record.
The **Inventory Put-away** card page opens.
3. On the **Lines** FastTab, on the action bar, select **More options**.
4. Select **Line > Lot Attributes**.
The **Lot Attribute Values** page opens.
Either delete/edit an already assigned attribute or add a new one.



1. To edit a value for an existing lot attribute, e.g., "pH", enter a new value in the **Value** field, e.g., "6.8".
2. To add a new lot attribute, select **Attribute** and select another lot attribute from the list, e.g., "Grade" created on the **Lot Attribute** page.
3. In the **Value** field, select the value based on the selected lot attribute, e.g., "A".
4. Select **OK** to apply the changes.

The screenshot shows a software interface with a 'Sandbox' title bar. On the left, there is a form with a label 'ood Ingredients BV' and a text input field containing '19'. On the right, a 'Lot Attributes' dialog box is open, highlighted with a red border. The dialog box contains a table with the following data:

ATTRIBUTE NAME	VALUE
pH	6.8