

User Manual

Aptean Food and Beverage ERP

Customer Specification Profile

Product Documentation



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Release notes

Article • 4/22/2026 • 1 min read

To view what's new in each release of the Aptean Customer Specification Profiles extension, select the specific release version.

Date	Release version	Description
April 2026	2601.0.0.0	Initial release



2601.0.0.0

Release Note • 4/22/2026 • 2 min read

Features

With the features added in this release of the Aptean Customer Specification Profiles extension, you can:

- Create and manage customer specification profiles at three scope levels — *All Items*, *Filter Group*, and *Item* with attribute criteria support for all attribute types including *numeric*, *text*, *option*, *boolean*, *date*, and *lookup*. *Activate*, *deactivate*, *copy*, and *validate profiles* in bulk from the profiles list, with active profile counts visible on the **Customer Card**, **Item Card**, and **Sales Orders** pages. For more information, see [Manage specification profiles](#) and [Define attribute criteria](#).
- Enforce lot attribute compliance automatically at every stage of the sales fulfillment process such as sales order entry, warehouse pick, and shipment posting with configurable **Show Error** (blocking) or **Show Warning** (informational) compliance actions per profile. For more information, see [Validate lots on sales orders](#), [Warehouse pick lot validation](#) and [Shipment posting compliance check](#).
- Override compliance failures as an authorized user by entering a mandatory reason, with every override captured on the **Specification Profile Override Log** page, including the stage, user, source document, and attribute failure details. For more information, see [Override permissions and audit log](#).
- Select compliant lots from the Spec-filtered lot selection page, which shows only lots meeting the active customer profile by default and provides real-time attribute-level *Pass/Fail* status for each lot. For more information, see [Spec-filtered lot selection](#).

Integrations

The Aptean Customer Specification Profiles extension has been integrated with the [Aptean Advanced Attributes](#) and the [Aptean Filter Groups](#) extensions. For more information, see [Integrations](#).



Introduction

Article • 4/22/2026 • 1 min read

The Aptean Customer Specification Profiles extension enables you to define and enforce customer-specific product attribute requirements throughout the sales fulfillment process from order entry through lot allocation, picking, and shipment posting.

The key benefits of this extension are:

- Automates lot attribute compliance enforcement across the sales fulfillment process — from order entry through picking and shipment posting.
- Prevents non-compliant lots from reaching regulated customers.
- Supports three profile scope levels — All Items, Filter Group, and Item — with intelligent priority resolution.
- Allows authorized users to override compliance failures with a mandatory reason code and a full audit trail.
- Provides a purpose-built lot selection page showing only compliant lots by default.

Important

To use the Aptean Customer Specification Profiles extension, the [Aptean Advanced Attributes](#) and [Aptean Filter Groups](#) extensions must be installed.



Setup

Article • 4/22/2026 • 1 min read

The following setups are required.

- [Manage permission sets](#)
- [Set up Customer Specification Profiles](#)



Manage Permission sets

Article • 4/22/2026 • 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 *CUS233FDW*.

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 *CUSBASIC233FDW*.

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.



You now have the necessary permissions to use the features of the Apteian Customer Specification Profiles extension, ensuring secure and role-based access.



Set-up-customer-specification-profiles

Article • 4/22/2026 • 2 min read

Use the **Specification Profile Setup** page to configure the number series used for specification profiles.

1. Select the Search icon  , enter **Specification Profile Setup**, and then choose the related link.
The **Specification Profile Setup** page opens.
2. In the **Profile Nos.** field, select the number series used to auto-assign codes when creating new specification profiles.



Manage-specification-profiles

Article • 4/14/2026 • 3 min read

Create a profile

Follow these steps to create a new specification profile:

- 1. Select the Search icon , enter **Customer Specification Profiles**, and then choose the related link, select **New**.
The **Customer Specification Profiles** page opens.
- 2. Select **New** to create a new customer specification profile.
- 3. On the **General** FastTab, enter the required information in the following fields:

Field	Description
Profile No.	Auto-assigned from the number series defined on the Specification Profile Setup page.
Profile Description	A descriptive name for the profile.
Specification Type	Specifies the entity type for the profile. The available options are: <i>Customer</i> : Assigns the profile to a specific customer. <i>Filter Group</i> : Assigns the profile to items that match a saved Aptean Filter Group.
Specification No.	Specifies the number associated with the selected Specification Type . When Specification Type is set to <i>Customer</i> , select the customer number. When set to <i>Filter Group</i> , select the filter group code.
Specification Description	Auto-populated based on the selected Specification No. value. Displays the customer name when Specification Type is <i>Customer</i> , or the filter group description when set to <i>Filter Group</i> .
Compliance Action	Determines how the system responds when a lot fails compliance. The available options are: <i>Show Error</i> : Blocks the lot assignment. The user must select a compliant lot, but authorized users can enter an override reason to proceed. <i>Show Warning</i> : Displays an informational warning and allows the lot to be assigned regardless.

- 4. On the **Item Details** FastTab, enter the required information in the following fields:

Field	Description
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Scope Type	Specifies which items the profile applies to. The available options are: <i>All Items</i> : Applies the profile to every item sold to the customer(priority-3). <i>Filter Group</i> : Applies the profile to items that match a saved Aptean Filter Group(priority 2). <i>Item</i> : Applies the profile to a single specific item for the customer(priority 1).
Scope No.	This field is visible only when the Scope Type field value is set to <i>Filter Group</i> or <i>Item</i> . Select the filter group code or item number to apply the profile.
Variant Code	This field value is optional. It is visible only when the Scope Type field value is set to <i>Item</i> and restricts the profile to a specific item variant.

 Note

When multiple profiles match the same customer and item, the highest-priority scope type profile is used.

5. On the **Attribute Criteria** page, select a new line and add one entry per attribute requirement. Use the AssistEdit button in the **Attribute Filter** field to define the filter expression. For more information, See [Define attribute criteria](#).

The following table describes the actions available on the **Customer Specification Profiles** page.

Action	Available On	Description
Activate	List, Card	Activates the profile and locks criteria for editing.
Deactivate	List, Card	Unlocks the profile for editing. The profile remains in the list.
Copy Profile	List, Card	Creates an inactive duplicate with all header and line data.
Test Validation	Card	Checks for incomplete criteria lines before activation.
Delete	Card	Permanently removes the profile. Only available for inactive profiles.
Override Log	Card (Related menu)	Opens the override log filtered to that profile.

6. Select the **Test Validation** action to check for incomplete criteria lines, then select Activate.

The profile status changes to *Active* and the criteria lines are locked for editing. Active profiles are indicated by the active status on the list.



Define-attribute-criteria

Article • 4/22/2026 • 3 min read

Each specification profile line defines the acceptable values for one attribute on a lot. Use the AssistEdit button in the **Attribute Filter** field to build filter expressions that the system uses to evaluate lot attribute values at compliance check time.

The following sections describe how to define attribute criteria for each supported attribute type.

Decimal (numeric) attributes

Use numeric criteria for attributes such as moisture percentage, potency, pH, viscosity, or concentration.

Criteria Type	Example Expression	Meaning
Between (range)	2 . 4	Value must be between 2 and 4 (inclusive)
Greater than	>95	Value must be greater than 95
Less than or equal to	<=1	Value must be 1 or less
Greater than and less than	>2<<4	Value must be greater than 2 and less than 4
Equal to	98	Value must be exactly 98

The system validates that numeric criteria are logically consistent. A minimum value cannot be greater than the maximum value. The profile cannot be activated until all numeric criteria are valid.

Text attributes

Use text criteria for attributes such as grade, certification status, or descriptive quality indicators.

Criteria Type	Example Expression	Meaning
Contains	@Organic	Value must contain "Organic"
Starts with	@Cert*	Value must start with "Cert"
Exact match	Natural	Value must be exactly "Natural"
Multiple allowed values	Natural\\ Light Gelatin	Value must be "Natural" or "Light Gelatin"



Date attributes

Use date criteria for attributes such as test date, expiry date, or re-test date.

Criteria Type	Example Expression	Meaning
Before	<01/01/2027	Date must be before January 1, 2027
After	>01/01/2025	Date must be after January 1, 2025
Between	01/01/2025..12/31/2026	Date must be within the range

Option attributes

Use option criteria for attributes with a predefined list of allowed values (for example, Grade A, B, C).

Select one or more allowed values from the list in the AssistEdit dialog. Multiple selections are combined using the pipe (|) separator — for example, A|B.

Boolean attributes

Select the required boolean value (Yes or No) from the AssistEdit dialog. For example, set **Gluten-Free** = Yes or **Prop 65 Detected** = No.

Lookup attributes

Lookup attributes reference values from a related table. Select one or more allowed lookup values from the AssistEdit dialog. Multiple selections are combined using the pipe (|) separator.

Industry examples

The following table illustrates attribute criteria for common regulated industries:

Industry	Attribute	Criteria Example	Expression
Nutraceuticals	Moisture	2%–4%	2..4
Nutraceuticals	Active Ingredient Potency	95%–105%	95..105



Customer Specification Profile

Nutraceuticals	Lead	≤ 1 ppm	≤ 1
Nutraceuticals	Gluten-Free	Yes	Yes
Dietary Supplements	Vitamin Purity	$\geq 98\%$	≥ 98
Dietary Supplements	Dissolution Time	≤ 30 min	≤ 30
Cosmetics	pH	5.0–7.0	5..7
Cosmetics	Lead	≤ 10 ppm	≤ 10
Personal Care	Fluoride	1000–1500 ppm	1000..1500
Personal Care	Dermatologist Tested	Yes	Yes



Spec-filtered-lot-selection

Article • 4/22/2026 • 2 min read

The Spec-filtered lot selection page provides a pre-filtered lot selection interface showing only lots that comply with the customer's active specification profile. It replaces manual attribute checks with automated *Pass/Fail* filtering.

Open the page

1. Navigate to the **Sales Order** page.
2. On the action bar, select **Item Tracking Lines**
3. Choose **Select Entries**.
The page opens automatically with the highest-priority active profile applied and compliant lots shown in Strict mode. This page is contextual and cannot be opened directly from search.
4. Navigate to the **Lot No. Information List** page. Open any Lot No.
5. On the **Specification Filter** FastTab, select **Change Specification Profile Filter** action, choose a customer profile, and the lot list is filtered accordingly.
The active filter is shown in the **Specification Filter** field on the list. Select **Clear Specification Profile Filter** to remove the filter and show all lots.

Profile priority

When opening from a sales order, the system automatically resolves the highest-priority active profile for the customer and item:

Priority	Profile Type	Used When
1 (Highest)	Item	Active profile for exact customer + item match.
2	Filter Group	No Item profile; item falls within an active Filter Group profile.
3	All Items	No Item or Filter Group profile; customer has an active All Items profile.

If no active profile exists for the customer and item, the standard lot selection page opens without filtering.

Compliance modes

The following table describes the compliance modes available on the **Spec-filtered Lot Selection** page.



Mode	Access	Behavior
Strict (default)	All users	Displays only lots whose attribute values pass all criteria defined in the active specification profile. Non-compliant lots are hidden from the list entirely. This is the default mode and ensures that users can only select lots that meet the customer's quality requirements.
Show All	Authorized users only	Displays all available lots regardless of compliance status. Non-compliant lots are visually marked with red icons and include failure tooltips showing which attributes failed and why.

To use the **Show All Lots** action, turn on the **Allow Specification Override** toggle on the **User Setup** page.



Warehouse-pick-lot-validation

Article • 4/22/2026 • 2 min read

Specification compliance is enforced during warehouse pick operations at four points: pick creation, auto-allocation, manual lot entry, and pick registration.

Pick creation

Pick creation is never blocked. If pre-assigned lots are non-compliant, a warning is displayed and the pick is created for the supervisor to resolve during picking.

Auto-allocation

The auto-allocation engine (FEFO) skips non-compliant lots. If all available lots are non-compliant, the pick line is created with a blank lot number for manual assignment.

Manual lot entry

Compliance Action	User Type	Behavior
Show Error	Standard user	Error shown. Lot cleared. You must choose a compliant lot.
Show Error	Authorized user	Confirmation dialog. Override reason required. Override logged with the Stage field value updated as <i>Picking</i> .
Show Warning	Any user	Warning shown. Lot accepted.

Previously overridden lots pass silently on re-entry if the profile has not changed.

Pick registration

All lots are re-validated at registration to detect profile or attribute changes since pick creation.

Scenario	Behavior
Lot passes all criteria	Proceeds silently. The lot is registered on the warehouse pick without any user prompts or validation messages.
Lot fails — Show Error, standard user	Registration blocked. Error shown.



Lot fails — Show Error, authorized user	Confirmation dialog. Override reason required. Override logged.
Lot fails — Show Warning	Warning shown. Registration allowed.
Previously overridden, profile unchanged	Passes silently.
Previously overridden, profile changed	Re-validation triggered. New override required.



Shipment-posting-compliance-check

Article • 4/22/2026 • 2 min read

A final compliance re-validation is performed for all lots when a sales shipment is posted. This acts as a safeguard to catch violations introduced after lot assignment — for example, if a profile was updated after picking.

For sales order lines at locations requiring warehouse shipments, validation runs at Warehouse Shipment posting only — not again during sales order posting.

Compliance response at posting

Scenario	Behavior
Lot passes all criteria	The shipment posts silently without any compliance prompts. All lots on the shipment meet the active profile criteria.
Show Error — no prior override, standard user	Posting blocked. Consolidated error listing all failing lots, attributes, actual values, and required criteria.
Show Error — no prior override, authorized user	Confirmation dialog. Override reason required. Override logged with the Stage field value updated as <i>Shipping</i> .
Show Error — prior override, profile unchanged	Passes silently. No re-confirmation required.
Show Error — prior override, profile changed	Re-validation triggered. New override required.
Show Warning	Warning shown. You confirm and post. No override permission required.
Mixed Show Error + Show Warning	Error violations resolved first; warnings shown one at a time after.

Skipped validation

Validation is skipped when no active specification profile exists for the customer and item, or when a lot was previously overridden and the profile has not changed.



Override-permissions-and-audit-log

Article • 4/22/2026 • 8 min read

Override permissions control which users can bypass compliance failures at each stage of the sales fulfillment process. Every override is recorded on the Specification Profile Override Log page for full auditability.

Configure override permissions

Override capability is controlled separately through the **User Setup** page in addition to the permission set.

1. Select the Search icon , enter **User Setup**, and then choose the related link.
The **User Setup** list page opens.
2. Locate the user and enable the override flag:

Field	Description
Allow Specification Override	Allows you to override specification compliance failures at sales order entry, warehouse picking, and shipment posting.

3. Users without this flag enabled receive a hard error with no option to bypass.

Grant override permissions

1. Select the Search icon , enter **User Setup**, and then choose the related link.
The **User Setup** page opens.
2. Locate the user (or create a new line with their User ID).
3. Enable the appropriate override flag(s) based on their role.
4. Close the page. The change takes effect immediately.

Authorized user override workflow

When you have override permission and encounter a compliance failure:

1. A confirmation dialog displays the failing attribute details.
2. You enter a mandatory override reason.
3. The lot or shipment is accepted and the override is recorded on the Specification Profile Override Log page.



Revoke override permissions

Return to User Setup, locate the user, and disable the relevant flag(s).

Specification profile override log

The **Specification Profile Override Log** page records every instance where an authorized user bypassed a compliance failure. Use it to audit all specification deviations across the sales process.

Open the log

Select the Search icon , enter **Specification Profile Override Log**, and then choose the related link. The **Specification Profile Override Log** page opens.

Log fields

The following table describes the fields on the **Specification Profile Override Log** page.

Field	Description
Entry No.	A system-generated, auto-incrementing sequence number that uniquely identifies each override log entry. This value cannot be modified.
Override DateTime	The date and time when the override was recorded in the system. Captured automatically at the moment the user confirms the override.
Override Stage	Sales (lot assignment), Picking (warehouse pick), Shipping (shipment posting), or Lot (lot-level override).
Override User ID	The user who performed the override.
Source Type	The document type (for example, sales order or warehouse pick).
Source Subtype	The subtype classification of the source document. For example, a sales order may have subtypes like Order or Return Order.
Source ID	The document number of the source record, such as the sales order number or warehouse pick number. Use this value to navigate directly to the originating document.



	overridden.
Customer No.	The customer number from the source document. Identifies which customer's specification profile was being enforced at the time of the override.
Item No.	The item number that was being validated against the specification profile's attribute criteria when the compliance failure occurred.
Variant Code	The item variant code, if a specific variant was involved in the compliance check. This field is blank if the item does not use variants or if the profile applies to all variants.
Lot No.	The lot number that failed the compliance check and was overridden. This is the specific lot whose attribute values did not meet the profile's criteria.
Profile No.	The profile code (profile number) of the specification profile that was active and being enforced at the time the override was recorded. Use this to trace which set of criteria the lot failed against.
Compliance Type	The specific type of compliance check that triggered the override, indicating which category of validation rule the lot failed (for example, attribute range check or text match).
Compliance Details	Attribute name, actual value, and required filter (for example, "Moisture: 5.2, required: >2 & <4").
Override Reason	The free-text reason entered by the authorized user when performing the override. This field is mandatory during the override process and serves as the primary audit justification for accepting a non-compliant lot.
Shipment No.	The posted shipment number associated with the override, if the override occurred during shipment posting. This field is blank for overrides that occurred during sales order entry or warehouse picking.
Posting Date	The posting date from the related source document. For shipment overrides, this is the shipment posting date. For sales and picking overrides, this reflects the document's posting date at the time of the override.

Impact on subsequent validations

Override entries are checked during later compliance stages to avoid repeated prompting:

- **Profile unchanged since override:** The lot passes silently at the next validation stage.
- **Profile changed since override:** Re-validation is triggered and a new override reason is required.



Lot-compliance-Factbox

Article • 4/22/2026 • 1 min read

Lot compliance factbox displays a real-time attribute breakdown for the selected lot

Field	Description
Attribute	Displays the name of the lot attribute being evaluated against the specification profile criteria.
Requirement	Displays the required value expression defined in the specification profile's attribute criteria line.
Actual	Displays the lot's actual stored attribute value as recorded in Aptean Advanced Attributes.
Status	Displays the compliance result for the individual attribute: <i>Pass</i> (shown with a green indicator) means the lot's actual value satisfies the requirement, or <i>Fail</i> (shown with a red indicator) means the actual value does not meet the criteria.

Select lots

1. Review available lots and the **Compliance** FactBox for the selected lot.
2. In the **Qty. to Handle** field, enter the quantity per lot. Total cannot exceed the remaining quantity on the sales order line.
3. In the **Show All** mode, selecting a non-compliant lot requires a confirmation and mandatory override reason. The override is logged.
4. Select **OK** to write the lot assignments to item tracking lines.

 **Note**

Closing without selecting **OK** discards all selections.



Integrations

Article • 4/22/2026 • 1 min read

The Aptean Customer Specification Profiles extension has been integrated with the following extensions:

- [Aptean Advanced Attributes](#)
- [Aptean Filter Groups](#)



Integration with Apteian Filter Groups

Article • 4/22/2026 • 1 min read

When the Apteian Customer Specification Profiles extension is used in conjunction with the Apteian [Filter Groups](#) extension, it supports filter group scope profiles. The Apteian Filter Groups extension must be installed before filter group scope profiles can be created.

When you create a specification profile with a filter group scope, you select a saved Apteian Filter Group as the scope number. The profile then applies to all items that match the filter group definition. If the filter group definition is updated, for example, when new items are added to the system that match the filter, the profile coverage updates automatically without requiring any changes to the profile itself.

A preview **FactBox** on the **Customer Specification Profile** card page displays the items currently covered by the selected filter group, allowing you to confirm coverage before activating the profile.

Filter group scope profiles have a lower priority than Item scope profiles but a higher priority than all items scope profiles. When both a filter group profile and an item profile exist for the same customer and item, the item profile takes precedence.

