

# User Manual

# Aptean Food and Beverage ERP

**Expiration Management**

Product Documentation



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# Release notes

Article • 3/25/2026 • 2 min read

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

Date	Release version	Description
March 2026	<a href="#">2601.4.0.0</a>	Stability release
February 2026	<a href="#">2601.3.0.0</a>	Stability release
January 2026	<a href="#">2601.2.0.0</a>	Stability release
January 2026	<a href="#">2601.1.0.0</a>	Stability release
January 2026	<a href="#">2601.0.0.0</a>	Feature release
November 2025	<a href="#">2506.1.0.0</a>	Stability release
October 2025	<a href="#">2506.0.0.0</a>	Feature release
September 2025	<a href="#">2505.2.0.0</a>	Stability release
August 2025	<a href="#">2505.1.0.0</a>	Stability release
August 2025	<a href="#">2505.0.0.0</a>	Feature release
July 2025	<a href="#">2504.4.0.0</a>	Stability release
May 2025	<a href="#">2504.3.0.0</a>	Stability release
May 2025	<a href="#">2504.2.0.0</a>	Stability release
May 2025	<a href="#">2504.1.0.0</a>	Stability release
May 2025	<a href="#">2504.0.0.0</a>	Feature release
April 2025	<a href="#">2503.1.0.0</a>	Stability release
April 2025	<a href="#">2503.0.0.0</a>	Feature release
March 2025	<a href="#">2502.0.0.0</a>	Feature release
March 2025	<a href="#">2501.3.0.0</a>	Stability release
February 2025	<a href="#">2501.2.0.0</a>	Stability release



January 2025	<a href="#">2501.1.0.0</a>	Stability release
January 2025	<a href="#">2501.0.0.0</a>	Feature release
December 2024	<a href="#">2404.4.0.0</a>	Stability release
December 2024	<a href="#">2404.3.0.0</a>	Platform release
December 2024	<a href="#">2404.2.0.0</a>	Stability release
December 2024	<a href="#">2404.1.0.0</a>	Stability release
November 2024	<a href="#">2404.0.0.0</a>	Feature release
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August 2024	<a href="#">2402.7.0.0</a>	Stability release
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July 2024	<a href="#">2402.4.0.0</a>	Stability release
July 2024	<a href="#">2402.3.0.0</a>	Stability release
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May 2024	<a href="#">2401.2.0.0</a>	Stability release



February 2024	<a href="#">2401.1.0.0</a>	Stability release
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February 2023	<a href="#">1.9.79774.0</a>	Feature release
July 2022	<a href="#">1.8.54107.0</a>	Stability release
May 2022	<a href="#">1.8.48230.0</a>	Stability release
February 2022	<a href="#">1.7.43576.0</a>	Stability release



# 2601.4.0.0

Release Note • 3/25/2026 • 1 min read

## Enhancements/Modifications

With this release of the Aptean Expiration Management extension, the system supports longer values in the **Endpoint Alerts** URL field to accommodate full Power Automate trigger URLs. The field length has been increased from 250 to 2048 characters. Previously, URLs exceeding 250 characters were truncated, preventing proper integration. This enhancement addresses the issue reported in bug ID #347513.

## Resolved issues

The following issues have been resolved in this release.

ID	Description
358646	The system fails to update the <b>Production Date</b> and <b>Remark</b> field values on the <b>Lot Origin details</b> page linked to the <b>Lot No. Information Card</b> page after posting an inventory put-away for a released production order. This issue occurs when the <b>Production Date for Output</b> field value equals the starting date on the <b>Item Expiration Setup</b> page.
347513	The system fails to store the complete <b>Endpoint Alerts</b> field value on the <b>Expiration Management Setup</b> page when configuring Power Automate integrations.
361014	A performance issue occurs when posting warehouse shipments on the <b>Warehouse Shipment</b> page, where each order takes several minutes to post, resulting in longer than expected posting times.



# 2601.3.0.0

Release Note • 2/25/2026 • 1 min read

## Enhancements/Modifications

With this release of the Aptean Expiration Management extension, the deprecated *InitFromItemJnlLine* procedure on the *Tracking Specification* record has been replaced with the *InitFromItemJnlLine* procedure from the standard *Item Jnl. Line-Reserve* codeunit in the *ChangeExpirationDateFDW* codeunit to ensure compatibility with Business Central, version 28.

## Resolved issues

The following issue has been resolved in this release.

ID	Description
350310	The system fails to adjust the unit cost when converting from production UOM to base UOM while using production orders and subcontracting functionality with differing units of measure.



# 2601.2.0.0

Release Note • 1/30/2026 • 1 min read

## Resolved issues

The following issue has been resolved in this release.

ID	Description
352381	The system incorrectly selects a lot with a later sales expiration date instead of the lot with the earlier sales expiration date when a value is specified in the <b>Expiration Action Calculation</b> field on the <b>Expiration Setup</b> page.



# 2601.1.0.0

Release Note • 1/28/2026 • 1 min read

## Resolved issues

The following issues have been resolved in this release.

ID	Description
335189	The system incorrectly displays the <b>Minimum Shelf Life Warning</b> field value on the <b>Item Tracking Lines</b> page when the <b>Item Tracking Code Card</b> page has the <b>Strict Expiration Posting</b> toggle turned on, causing the warning to be triggered one day earlier than expected.
340796	An error occurs on the <b>Warehouse Journal</b> page when updating the expiration date. This issue arises when the <b>No. Series</b> field value is left blank on the related <b>Warehouse Journal Batches</b> page.



# 2601.0.0.0

Release Note • 1/28/2026 • 1 min read

## Features

With the feature added in this release of the Aptean Expiration Management extension, you can define a custom caption for the **Lot Production Date** field across multiple pages. This enables you to replace the standard caption with business-specific terminology through the **Expiration Management Setup** page. To know more, see [Set up expiration management](#).

## UI/UX changes

The **Lot Production Date Caption** field has been added to the **Expiration Management Setup** page.



# 2506.1.0.0

Release Note • 11/26/2025 • 1 min read

## Enhancements/Modifications

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

## Resolved issues

The following issue has been resolved in this release.

ID	Description
330531	An error occurs on the <b>Lot No. Information Card</b> page when updating the <b>Change Expiration Date</b> field value if the lot contains inventory with different units of measure on the associated license plate.



# 2506.0.0.0

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

## Resolved issues

The following issue has been resolved in this release.

ID	Description
324374	The system fails to update the <b>Expiration Date</b> field value on the <b>Details</b> screen of the Apteon Mobile Warehouse app. This issue arises when the item expiration setup is configured to vendor production date and the Apteon <a href="#">Mobile Warehouse Registration</a> extension is installed.



# 2505.2.0.0

Release Note • 9/24/2025 • 1 min read

## Enhancements/Modifications

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

## Resolved issues

The following issue has been resolved in this release.

ID	Description
321453	The system incorrectly inherits the <b>Vendor Lot No.</b> and <b>Vendor Production Date</b> field values from the previous line to the next line on the <b>Item Tracking Lines</b> page when executing the <b>Assign Lot No.</b> action. This issue arises when the <b>Expiration Date Calc.</b> field value is set to <i>Vendor Production Date</i> on the <b>Expiration Setup</b> page and when the Aptean <a href="#">Lot Management</a> extension is installed.



# 2505.1.0.0

Release Note • 8/27/2025 • 1 min read

## Enhancements/Modifications

With this release of the Aptean Expiration Management extension:

- The **ReasonCodeChangeExpirationDate** variable has been changed from global variable to protected variable on the **Change Expiration Date** page for supporting customizations related to expiration management.
- The *NoSeriesManagement* codeunit has been replaced with the standard *No. Series* codeunit on the *ChangeExpirationDateFDW* codeunit to ensure compatibility with Business Central, version 27.



# 2505.0.0.0

Release Note • 8/27/2025 • 1 min read

## Features

With the feature added in this release of the Aptean Expiration Management extension, you can modify the **Expiration Date** field value on the **Lot No. Information Card** page for lots across multiple bins and multiple locations, if the locations are non-directed on the **Lot No. Information Card** page.

## Resolved issues

The following issue has been resolved in this release.

ID	Description
301614	The system fails to update the <b>Expiration Date</b> field value for all license plates linked to the same lot on the <b>Detailed Warehouse Ledger Entries</b> page. This issue occurs after executing the <b>Change Expiration Date</b> action on the <b>Lot No. Information Card</b> page when multiple license plates are assigned to the associated lot and when the Aptean <a href="#">Advanced Warehouse Management</a> extension is installed.



# 2504.4.0.0

Release Note • 7/3/2025 • 1 min read

## Features

With the features added in this release of the Apteon Expiration Management extension, the system:

- Automatically updates the **Expiration Date** field value when you enter the **Vendor Production Date** field value on the **Item Tracking Lines** page, for a lot number or if there are multiple item tracking lines associated with the license plate numbers. For more information, see [Manual or automatic expiration date calculation](#).

### Note

This feature addresses the issue reported in bug ID \#291515 and is available only when the Apteon [License Plating](#) extension is installed.

- Allows you to change the item tracking code by selecting the *Change Tracking Setup for Purchase items* option in the **Title** field on the **Assisted Setup** page. For more information, see [Assisted setup to change tracking setup for purchase items](#).

## UI/UX changes

The *Change Tracking Setup for Purchase items* option has been added to the **Title** field on the **Assisted Setup** page.

## Resolved issues

The following issue has been resolved in this release.

ID	Description
291515	The system fails to update the <b>Expiration Date</b> field value for a lot number when entering the <b>Vendor Production Date</b> field value on the <b>Item Tracking Lines</b> page. This issue occurs when the <b>Require Expiration Date Entry</b> toggle on the <b>Item Tracking Code Card</b> page is turned off.



# 2504.3.0.0

Release Note • 5/27/2025 • 1 min read

## Enhancements/Modifications

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



# 2504.2.0.0

Release Note • 5/21/2025 • 1 min read

## Resolved issues

The following issue has been resolved in this release.

ID	Description
290500	The system incorrectly updates the <b>Expiration Date</b> field value with the work date on the <b>Item Tracking Lines</b> page. This issue occurs when assigning a lot and the <b>Expiration Calculation</b> field value is blank on the associated <b>Item Card</b> page.



# 2504.1.0.0

Release Note • 5/7/2025 • 1 min read

## Resolved issues

The following issue has been resolved in this release.

ID	Description
286307	The system displays incorrect translations for the <b>Item Attribute Name</b> and <b>Item Attribute Value</b> fields on the <b>Based On Item Attribute</b> FastTab and the <b>Production Date for Output</b> field on the <b>Based On Item</b> FastTab on the <b>Expiration Setup</b> page. This issue occurs when the <b>Region</b> and <b>Language</b> field values are set to <i>German (Germany)</i> on the <b>My Settings</b> page.



# 2504.0.0.0

Release Note • 5/7/2025 • 1 min read

## Enhancements/Modifications

With this release, when the Aptean Expiration Management extension is used in conjunction with the Aptean Beverage Foundation Management extension, Drink-IT Edition, the shelf-life validation logic has been adjusted to bypass expiration checks when executing the **Correct Financial** action on the **Posted Sales Invoice** page. This ensures that shelf-life date formula validations do not block financial corrections. For more information, see [What's new in version Beverage Foundation Management, version 2502.0.0.0](#).

## Integrations

The Aptean Expiration Management extension has been integrated with the Aptean [Beverage Foundation Management](#) extension, Drink-IT Edition. For more information, see [Integrations](#).



# 2503.1.0.0

Release Note • 4/29/2025 • 1 min read

## Enhancements/Modifications

The translation file for the Swedish (sv-SE) language has been updated with standard texts for better readability.



# 2503.0.0.0

Release Note • 4/23/2025 • 1 min read

## Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean Mobile Warehouse Registration extension. To know more, see [What's new in Mobile Warehouse Registration, version 2508.0.0.0](#).



# 2502.0.0.0

Release Note • 3/12/2025 • 1 min read

## Features

With this release of the Aptean Expiration Management extension, you can modify the **Expiration Date** field value on the **Lot No. Information Card** page for items assigned with advanced warehouse management license plates. For more information, see [Integrations](#).

## Integrations

The Aptean Expiration Management extension has been integrated with the Aptean Beverage [Advanced Warehouse Management](#) extension, Drink-IT Edition.



# 2501.3.0.0

Release Note • 3/5/2025 • 1 min read

## Resolved issues

The following issue has been resolved in this release.

ID	Description
272973	An error occurs while attempting to upgrade this extension.



# 2501.2.0.0

Release Note • 2/14/2025 • 1 min read

## Resolved issues

The following issue has been resolved in this release.

ID	Description
259111	The system incorrectly assigns the expired lots while creating a warehouse pick when the <b>Exclude Sales Expired Lots from FEFO Proposal</b> toggle on the <b>Expiration Management Setup</b> page is turned on.



# 2501.1.0.0

Release Note • 1/27/2025 • 1 min read

## Resolved issues

The following issue has been resolved in this release.

ID	Description
259776	The system incorrectly updates the <b>Expiration Date</b> field with the same value for all lines, even when they have different lot numbers, on the <b>Warehouse Activity Line</b> page. This issue occurs when the <b>Change Expiration Date</b> action is selected on the <b>Lot No. Information List</b> page for a lot number linked to the <b>Warehouse Activity Line</b> page.



# 2501.0.0.0

Release Note • 1/15/2025 • 1 min read

## Features

With this release of the Apteon Expiration Management extension, you can create an alert on the **Expiration Management Alerts** page when changing the expiration date using the **Change Expiration date** action on the **Lot No.Information Card** page. For more information, see [Set up expiration status](#).

## UI/UX changes

The following fields have been added to the **Alerts** FastTab of the **Expiration Management Setup** page.

- Notification Service
- Endpoint Alerts
- Authentication Type
- Username
- Password



# 2404.4.0.0

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

## Enhancements/Modifications

The translation files for the Chinese (zh-CN) language have been updated with standard texts for better readability.



# 2404.3.0.0

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

## Enhancements/Modifications

With this release of the Apteian Expiration Management extension, a condition has been added to trigger the *GetLicense()* procedure in the *GetLicenseManagement06FDW* codeunit, enhancing customization.



# 2404.2.0.0

Release Note • 12/18/2024 • 1 min read

## Enhancements/Modifications

With this release of the Aptean Expiration Management extension, the translation file for the Chinese (zh-CN) language has been added.



# 2404.1.0.0

Release Note • 12/10/2024 • 1 min read

## Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean Process Manufacturing extension. To know more, see [What's new in Process Manufacturing, version 2412.1.0.0](#).



# 2404.0.0.0

Release Note • 11/7/2024 • 1 min read

## Enhancements/Modifications

With this release of the Apteon Expiration Management extension, when you change the expiration date on the **Lot No. Information Card** page using the **Change Expiration Date** functionality, the system will prompt you to confirm whether the updated date should be reflected in the relevant existing warehouse entries (pick and put-away).



# 2403.4.0.0

Release Note • 10/24/2024 • 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 2404.8.0.0](#).



# 2403.3.0.0

Release Note • 10/24/2024 • 1 min read

## Enhancements/Modifications

With this release of the Apteian Expiration Management extension, the *Power BI Report Spinner Part* object has been removed from the *ExpirationMgtRoleCenterFDW* page to ensure compatibility with Business Central, version 26.



# 2403.2.0.0

Release Note • 10/23/2024 • 1 min read

## Enhancements/Modifications

With this release of the Apteian Expiration Management extension, the *Power BI Report Spinner Part* object has been made obsolete and replaced with *Power BI Embedded Report Part* on the *ExpirationMgtRoleCenterFDW* page to ensure compatibility with Business Central, version 26.



# 2403.1.0.0

Release Note • 10/21/2024 • 1 min read

## Resolved issues

The following issue has been resolved in this release.

ID	Description
240357	A performance issue occurs when the system checks for item tracking lines for types other than items in sales and purchase orders. This issue delays the posting process, especially with multiple lines.



# 2403.0.0.0

Release Note • 10/15/2024 • 1 min read

## Enhancements/Modifications

With this release of the Aptean Expiration Management extension, you can use the calculated expiration date of the item and item attribute based on the configuration on the **Expiration Setup** page. Additionally, the system automatically suggests the lot number by considering the expiration date of the item during the pick activity. To know more, see [What's new in Warehouse Management System, version 2404.0.0.0](#).

## Integrations

The Aptean Expiration Management extension is integrated with the Aptean [Warehouse Management System](#) extension.



# 2402.10.0.0

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.



# 2402.9.0.0

Release Note • 9/12/2024 • 1 min read

## Resolved issues

The following issue has been resolved in this release.

ID	Description
229779	The system displays an error message when executing the <b>Change Status</b> action on the <b>Released Production Order</b> page to change the production order status to <i>Finished</i> , as the system incorrectly checked if an associated assembly header exists.



# 2402.8.0.0

Release Note • 8/29/2024 • 1 min read

## Resolved issues

The following issue has been resolved in this release.

ID	Description
219583	A permission error occurs when the system tries to update the lines on the <b>Lot Origin Details</b> FastTab of the <b>Lot No. Information Card</b> page.



# 2402.7.0.0

Release Note • 8/21/2024 • 1 min read

## Enhancements/Modifications

With this release of the Apteon Expiration Management 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.



# 2402.6.0.0

Release Note • 8/20/2024 • 1 min read

## Resolved issues

The following issue has been resolved in this release.

ID	Description
222705, 221598	An error occurs when executing the <b>Change Expiration Date</b> action on the <b>Lot No. Information List</b> page. This issue occurs when attempting to change the expiration date for a lot associated with multiple license plates.



# 2402.5.0.0

Release Note • 7/25/2024 • 1 min read

## Resolved issues

The following issue has been resolved in this release.

ID	Description
216142	An error occurs upon executing the <b>Assign Lot No.</b> action on the <b>Item Tracking Lines</b> page for planning worksheets. This issue arises when the <b>Production Date for Output</b> field value is selected on the <b>Based On Item</b> or <b>Based On Item Attribute</b> FastTab on the <b>Expiration Setup</b> page of the associated item.



# 2402.4.0.0

Release Note • 7/15/2024 • 1 min read

## Resolved issues

The following issue has been resolved in this release.

ID	Description
216218	The system incorrectly splits the <i>Place</i> line on the Apteon Mobile Warehouse app when picking partial quantities from multiple lots if the <b>Pick According to FEFO</b> toggle on the <b>Location Card</b> page is turned on. After changing the lot number for the remaining quantity, the <i>Place</i> line does not match the <i>Take</i> line, causing registration issues.



# 2402.3.0.0

Release Note • 7/9/2024 • 1 min read

## Resolved issues

The following issues have been resolved in this release.

ID	Description
215575	An error occurs when assigning a lot number to an item with an expiration date on the <b>Firm Planned Order, Planned Production Order, or Simulated Production Order</b> page. <b>Note:</b> This fix also resolves an issue that occurs when creating a production order in the Apteon Lot Management extension while working with the Apteon Expiration Management extension in bug ID #216011
215777	An error occurs when creating a warehouse pick after generating a warehouse shipment from a purchase return order, transfer order, or released production order. This issue occurs due to the FEFO inventory setup, which is only available for sales-related documents.



# 2402.2.0.0

Release Note • 6/28/2024 • 1 min read

## Resolved issues

The following issue has been resolved in this release.

ID	Description
215434	Performance issues occur due to the use of the existing inventory FlowFields, causing slowdowns while performing the expiration management activities on the role center.



# 2402.1.0.0

Release Note • 6/25/2024 • 1 min read

## Enhancements/Modifications

The following enhancements have been made in this release.

- The *OnBeforeGetSalesShelfLifeDate* event is added to the *CheckExpirationDateFDW* codeunit to allow custom handling before retrieving the sales shelf life date.
- The *ShowMinimumSalesShelfLifeWarning* procedure in the *CheckExpirationDateFDW* codeunit is updated to ensure that it is accessible as needed, improving the usability and integration with other processes.



# 2402.0.0.0

Release Note • 6/13/2024 • 2 min read

## Features

With this release of the Apteian Expiration Management, you can:

- Define the expiration setup based on item attributes.
- Choose to receive an error if any of the expiration date setups fail such as FEFO, purchase shelf life, and sales shelf life.
- Define the expiration setup for an item based on customer and vendor on the **Expiration Setup** page of the item.
- Use the planned delivery date as the base date for expiration calculations on sales documents such as sales orders, warehouse shipments, and inventory picks.
- Configure to use the document date or vendor production date as the base date for expiration calculations on purchase documents such as purchase orders, warehouse receipts, and inventory put-aways.
- Configure to use the posting date, starting date, ending date, or vendor production date as the base date for expiration calculations for production and assembly orders.

For more information, see [Item Expiration Setup](#).

- Configure the FEFO inventory warning value as a date formula for customers, vendors, items, and item attributes. For more information, see [Item Expiration Setup](#) and [Expiration Management Setup](#).
- View the sales expiration date and expiration action date in the respective fields and the document number in the **Remark** field on the relevant **Lot No. Information Card** page.

## Integrations

You can integrate the Apteian Expiration Management extension with:

- The Apteian [Shop Floor Production](#) extension to use the calculation for the expiration date in the Apteian Shop Floor Production Power App.
- The Apteian [Lot Management](#) extension to use the production date from the **Lot No. Information Card** page which can be used for expiration date calculation.

## UI/UX changes

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



- The **Item Attribute Expiration Setup** page is added.
- The **Item Expiration Setup per Customer** page is removed.
- The **Based on Customer/Vendor**, **Based On Item**, and **Based On Item Attribute** FastTabs are added to the **Expiration Setup** page of the item.
- The **General** FastTab is removed from the **Expiration Setup** page of the item.
- The **Item Attribute Expiration Setup** action is added to the **Expiration Management Setup** page.
- The **Expiration Setup per Customer** action is removed from the **Item Card** page.
- The **Failing Expiration Check** field is added to the **Expiration Management Setup** page.
- The **FEFO Inventory Warning** toggle is modified as a dropdown field.



# 2401.3.0.0

Release Note • 6/5/2024 • 1 min read

## Enhancements/Modifications

The translation files for the Swedish (sv-SE) language have been updated with standard texts for better readability.



# 2401.2.0.0

Release Note • 5/27/2024 • 1 min read

## Resolved issues

The following issue has been resolved in this release.

ID	Description
201507	An error occurs upon registering a pick document in Business Central when the <b>Permission Set</b> is configured as <i>BASIC</i> for the user.



# 2401.1.0.0

Release Note • 2/7/2024 • 1 min read

## Resolved issues

The following issue has been resolved in this release:

ID	Description
173539	Warehouse picks are created for items with expiration dates that exceed the Minimum Sales Shelf Life, even when the <b>Pick According to FEFO</b> toggle on the associated <b>Location Card</b> page is turned on.



# 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 Apteon Lot Management extension. To know more, see [What's new in version 2401.0.0.0](#).



# 2301.1.0.0

Release Note • 10/26/2023 • 1 min read

## Enhancements/Modifications

The translation files have been updated to provide precise translations for field labels, tooltips, and other interface elements, resulting in improved accuracy and an enhanced user experience.



# 1.12.108779.0

Release Note • 7/14/2023 • 1 min read

## Enhancements/Modifications

Modifications were made to this extension to accommodate the changes in the Apteon Lot Management extension. To know more, see the [Release Notes](#) of the Apteon Lot Management extension.



# 1.12.103162.0

Release Note • 6/13/2023 • 1 min read

## Enhancements/Modifications

Modifications were made for this extension to accommodate the changes in the Aptean Lot Management extension (1.24.103469.0). To know more, see [Release Notes](#) of the Aptean Lot Management extension.



# 1.11.97138.0

Release Note • 5/12/2023 • 1 min read

## Enhancements/Modifications

- Modifications were made to seamlessly migrate from the [Interface Management](#) extension to the [Integration Layer](#) extension.
- Dependency on Interface Management extension has been completely removed.



# 1.10.88980.0

Release Note • 4/3/2023 • 1 min read

## Resolved Issues

The following issue has been fixed in this release:

ID	Description
94446	An error occurs when performing the <b>Change Expiration Date</b> function on the <b>Lot No. Information Card</b> page, if there is a discrepancy in the units of measure of the item on the <b>Item Card</b> page and the document.



# 1.9.79774.0

Release Note • 4/3/2023 • 1 min read

## Features

With this release of the Aptean Expiration Management extension, you can access the following cues and navigation menus from the Role Center page for the Business Manager, Shipping and Receiving - Warehouse Management System, Sales Order Processor, and Manufacturing Manager roles:

| Cue |

| --- | --- |

| Expiration Date | ExpDate < 7 Days |

| Expired |

| Sales Exp. Date | SalesExpDate < 7 Days |

| Exp. Action Date | ExpActDate < 7 Days |

| Navigation Menu |

| --- | --- |

| Lot Information | Lot No. Information List |

| Alerts | Expiration Management Alerts |

| Create Expired Expiration Management Alerts |

| Setup | Expiration Management Setup |

| Icon Setup |

| Item Tracking Code |



# 1.8.54107.0

Release Note • 4/3/2023 • 1 min read

## Enhancements/Modifications

Minor technical changes were made to seamlessly work with the [Aptean Advanced Attributes](#) extension.

## Resolved Issues

The following issue has been fixed in this release:

ID	Description
54026	An error occurs when selecting the lot number on the <b>Item Tracking Lines</b> page if the sales document line has lot attribute values.



# 1.8.48230.0

Release Note • 4/3/2023 • 1 min read

## Enhancements/Modifications

The enhancements in this release are listed below:

- A localized version of Expiration Management extension is made available for the Switzerland market with the addition of German language code [de-CH].
- Minor technical changes were made to keep our apps in line with the *updated* coding guidelines for Business Central.



# 1.7.43576.0

Release Note • 4/3/2023 • 1 min read

## Enhancements/Modifications

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



# Introduction

Article • 7/3/2025 • 4 min read

The Aptean Expiration Management (EXM) extension enhances the capabilities of Dynamics 365 Business Central by providing a comprehensive set of features for managing expiration dates and ensuring compliance with inventory requirements.

You can perform the following activities with this extension.

- **Expiration Date Calculation:** The Expiration Management extension allows for the calculation of informative dates related to the expiration date of a lot. This feature enables users to determine the expiration date based on specific criteria, such as production date, shelf life, or other factors. By accurately calculating expiration dates, businesses can effectively manage inventory and reduce waste.
- **FEFO Inventory Requirement:** The module also facilitates compliance with the First-Expired-First-Out (FEFO) inventory requirement. When executing a purchase receipt or sales shipment, the system verifies if the FEFO method is followed. This ensures that items with the earliest expiration dates are picked first during inventory and order fulfillment processes. Additionally, the extension enables the exclusion of lot numbers that do not meet the minimum sales shelf life requirements.
- **Lot Expiration Date Adjustment:** With the Expiration Management extension, users have the ability to modify the expiration date of a lot number. This feature provides flexibility in case adjustments or corrections are necessary due to unforeseen circumstances or changes in inventory conditions.
- **Insight and Reporting:** The module offers valuable insights into expiration-related issues through visual cues and integration with Power BI. For example, users can monitor the quantity or inventory value of lot numbers that will expire within a specific timeframe. This data can be used to make informed decisions and take proactive measures to prevent potential losses.
- **OData-Feeds for Reporting:** Upon installation, the extension automatically generates OData feeds in the Web Services. These feeds can be leveraged for Power BI reporting purposes, specifically for expiration management. By utilizing Power BI's robust reporting capabilities, businesses can gain comprehensive visibility into expiration-related metrics and trends.
- **Proactive Expiration Alerts and Automation:** The module creates expiration alerts, which can be utilized to trigger proactive workflows using Microsoft Power Automate. For instance, the quality manager can receive notifications about upcoming expirations and take appropriate actions in a timely manner. Moreover, expiration alerts can be integrated with external systems using the Azure Service Bus, enabling seamless communication and process automation.
- **Prerequisites and Configuration:** To ensure the extension functions correctly, it is essential to set the item tracking code for the used items. This includes enabling all the lot-specific toggles on the **Item Tracking Code Card**. Additionally, the **Require Expiration Date Entry** toggle must be turned on for the extension to operate properly. Depending on the preferred method for determining expiration dates (automatic or manual), the **Require Expiration Dates** toggle should be adjusted accordingly. For more information, see [Manual or automatic expiration date calculation](#).
- **Lot Number Creation and Expiration Date Calculation:** When creating and posting a lot number during an inbound transaction, the extension automatically calculates the sales expiration date and the expiration action



date. These dates are determined based on the formulas specified in the **Expiration Calculation**, **Minimum Sales Shelf Life**, and **Expiration Action Calculation** fields. Detailed information on setting up item expiration and calculating sales expiration dates can be found in the [Item Expiration Setup](#) and [Calculation of the Sales Expiration Date and Expiration Action Date](#) topics.

By implementing the Expiration Management extension, businesses can effectively manage expiration dates, ensure compliance with inventory requirements, and make data-driven decisions to optimize their operations. The module provides a range of features, including expiration date calculation, FEFO inventory management, lot expiration date adjustment, insights and reporting, proactive alerts and automation, and seamless integration with external systems.



# Setup

Article • 8/2/2024 • 1 min read

The following setups are required.

- [Manage permission sets](#)
- [Set up item expiration](#)
- [Set up expiration management](#)



# Manage permission sets

Article • 10/21/2024 • 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 *EXPIRATIONMGTFDW*.

## Indirect permission sets

Users with this permission set can perform specific actions. This is used in conjunction with other permission sets and typically involves additional conditions or approvals before an action can be completed.

The indirect permission set ID for this extension is *EXPMGTBASICFDW*.


## 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 Apteian Expiration Management extension, ensuring secure and role-based access.



# Set up item expiration

Article • 8/12/2025 • 9 min read

The **Expiration Setup** page for an item includes fields that must be filled to activate checks for FEFO inventory warnings/errors and minimum sales/purchase shelf life. For more information about how these warnings/errors are displayed during inbound and outbound processes, see [Minimum Shelf Life](#) and [FEFO Inventory Warning](#).

To configure the **Expiration Setup** page for an item, follow these steps:



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

The **Items** list page opens.

2. Select the required **No.** to open the **Item Card** page.
3. On the action bar, click **Related > Item > Expiration Setup**.

The **Expiration Setup** page opens.

4. On the **Based on Customer/Vendor** FastTab, fill in the required fields. For more information, see the Expiration Setup per Customer/Vendor topic explained below.
5. On the **Based On Item** FastTab, enter the required information in the following fields:

Field	Description
Minimum Purchase Shelf Life	Enter the value for minimum purchase shelf life with a date formula. For more information, see <a href="#">Minimum Shelf Life</a> .
Minimum Sales Shelf Life	Enter the value for minimum sales shelf life with a date formula. This field is editable only when the <b>Source Type</b> field is set to <i>All Customers</i> and <i>Customers</i> . For more information, see <a href="#">Minimum Shelf Life</a> .
Expiration Action Calculation	Enter the value for expiration action calculation with a date formula. For more information, see <a href="#">Expiration Action Date</a> .
FEFO Inventory Warning	Select the appropriate option for FEFO inventory warning checks in the documents. For more information, see <a href="#">FEFO Inventory Warning</a> .
Production Date for Output	Select the appropriate date option based on which the expiration date should be calculated on production and assembly orders. The available options are blank, <i>Posting Date</i> , <i>Starting Date</i> , <i>Ending Date</i> , and <i>Lot Production Date</i> . The default option is <i>Posting Date</i> . For more information, see <a href="#">Expiration Date</a> .
Expiration Date Calc.	Select the appropriate date option based on which the expiration date should be calculated on purchase documents. The available options are blank, <i>Document</i>



*Date*, and *Vendor Production Date*. For more information, see [Expiration Date](#).

1. On the **Based on Item Attribute** FastTab, you can view the configurations set for associated item attribute values. The fields on this FastTab are non-editable, and the values are inherited from the **Item Attribute Expiration Setup** page for the relevant item attribute value. To set up the configuration for item attribute values, see [Item Attribute Expiration Setup](#).

## Expiration Setup per Customer/Vendor

For each customer/vendor, you can configure a minimum sales/purchase shelf life for an item that overrides the general minimum sales/purchase shelf life set for that item. A warning or an error would appear if the lot used in a sales/purchase transaction has an expiration date that does not meet the customer's/vendor's specified minimum sales/purchase shelf life. For more information, see [Minimum Shelf Life](#) and [FEFO Inventory Warning](#).

To configure that, follow these steps:

1. On the **Based on Customer/Vendor** FastTab, enter the required information in the following fields:

Field	Description
Source Type	Select the required source type for whom you want to configure the expiration setup for the item. <i>Customers</i> – Select this option to configure the setup for a specific customer. <i>All Customers</i> – Select this option to configure the setup for all customers. <i>Vendors</i> – Select this option to configure the setup for a specific vendor. <i>All Vendors</i> – Select this option to configure the setup for all vendors. Blank – Select this option to configure the setup for all the above options.
Source No.	Select the required source number. This value is filtered based on the selected source type. For example, if the <b>Source Type</b> field is set to <i>Customer</i> , this field is filtered with customer numbers. Also, this field is editable only when the <b>Source Type</b> field is set to <i>Customer</i> or <i>Vendor</i> and the <b>Source No.</b> field has a value.
Address Code	Select the required ship-to address code. This field is editable only when the <b>Source No.</b> field has a value. It is an optional field.
Minimum Purchase Shelf Life	Enter the value for minimum purchase shelf life with a date formula. This field is editable only when the <b>Source Type</b> field is set to <i>All Vendors</i> or <i>Vendors</i> . For more information, see <a href="#">Minimum Shelf Life</a> .
Minimum Sales Shelf Life	Enter the value for minimum sales shelf life with a date formula. This field is editable only when the <b>Source Type</b> field is set to <i>All Customers</i> or <i>Customers</i> . For more information, see <a href="#">Minimum Shelf Life</a> .



FEFO Inventory Warning

Select the appropriate option for FEFO inventory warning checks in the documents.  
For more information, see [FEFO Inventory Warning](#).

You can set this configuration for multiple specific customers and vendors. When multiple configurations exist, the system determines the minimum shelf life and FEFO inventory warning values based on the following hierarchy:

## Specific Customer/Vendor with Address Code

The system first checks for a configuration matching the specific customer/vendor and the address code associated with the sales or purchase documents.

## Specific Customer/Vendor without Address Code

If no match is found in the previous step, the system checks for a configuration matching the specific customer/vendor associated with the sales or purchase documents.

## All Customers and All Vendors

If no match is found in the previous steps, the system checks for configurations with the **Source Type** field set to *All Customers* and *All Vendors*.

## Blank Source Type

If no match is found in the previous steps, the system checks for configuration with the blank **Source Type** field.

## Based on Item and Based on Item Attribute FastTabs

- If the configurations mentioned above doesn't exist, the system first checks for configuration on the **Based On Item** FastTab.
- If none of the above configurations exist, the system checks for configuration on the **Based On Item Attribute** FastTab.

For more information, see [Minimum Shelf Life](#) and [FEFO Inventory Warning](#).

The configuration on the **Based On Item** and **Based On Item Attribute** FastTabs applies only to sales and purchase documents.

For sales documents, the system checks configurations with the **Source Type** field set to *Customers* and *All Customers* for the minimum sales shelf life and FEFO inventory warning. For purchase documents, it checks



## Expiration Management

configurations with the **Source Type** field set to *Vendors* and *All Vendors* with the minimum purchase shelf life and FEFO inventory warning.

You can also view and edit the item expiration setup for a specific customer from the **Customer Card** page. To do that, follow these steps:



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

The **Customers** list page opens.

2. Select the required **No.** to open the relevant **Customer Card** page.
3. On the action bar, select **More options** > **Related** > **Customer** > **Item Expiration Setup**.

The **Expiration Setup per Item** page opens, displaying the same information as the **Expiration Setup** page but specific to the relevant customer. This page includes details such as address code, item number, minimum sales shelf life, and FEFO inventory warning. You can edit these details as required, and these changes will be reflected on the relevant **Expiration Setup** page for the relevant items.

Similarly, you can view and edit the item expiration setup for a specific vendor from the **Vendor Card** page.



# Set up expiration management

Article • 1/28/2026 • 12 min read

## General expiration management setup

Before being able to change the expiration date of an existing lot, you must set up a journal template name and a journal batch name. This is essential because the function to change the expiration date uses the Item Reclassification Journal for which a journal template and batch is used.

There can be several general journal templates in Microsoft Dynamics 365 Business Central. Each journal template is represented by a dedicated page with specific functions and the fields that are required to support those functions. For each journal template, it's necessary to set up a journal batch. The **No. Series** field must have a value in the item journal batch. If the **No. Series** field on the journal batch is filled, the posting function in general journals requires that the document number on individual or grouped journal lines are in sequential order. This is done by turning on the **Default Nos** toggle in the **No. Series** list. This will automatically fill the field with the next number in the series.

When changing the expiration date, the set up item journal template name is used. A new item journal batch is automatically created with your own username. This item journal batch name is linked to the earlier mentioned item journal name which is used by the **Change Expiration Date** function. It is important not to add any manual lines in this item reclassification journal name and batch, because they are removed when using the **Change Expiration Date** function.



1. Select the Search icon , enter **Expiration Management Setup** and then choose the related link.

The **Expiration Management Setup** page opens.

2. Click the lookup button in the **Journal Template Name** field.
3. Select the required journal template name used for changing the expiration date.
4. Click the lookup button in the **Journal Batch Name** field.
5. Select the required journal batch name used for changing the expiration date.  
If a location exists that uses directed put-away and pick, which requires that the location uses advanced warehouse functionality, the following setup must be completed as well.
6. Click the lookup button in the **Warehouse Journal Template Name** field.
7. Select the required journal template name used for changing the expiration date when on the location card the **Directed Put-away and Pick** toggle is turned on.
8. Click the lookup button in the **Warehouse Journal Batch Name** field.
9. Select the required journal batch name.  
If a connection between Microsoft Dynamics 365 Business Central and a 3rd party solution or service exists which uses an API to change the expiration date, a reason code must be set up. When using the API "Change



Expiration Date", the "API Reason Code Change Expiration Date" from the **Expiration Management Setup** page will be used.

10. Click the lookup button in the **API Reason Code Change Expiration Date** field.
11. Select the required reason code that is used when the expiration date is changed through an API.
12. Turn on the **Exclude Sales Expired Lots from FEFO Proposal** toggle to exclude lot numbers from FEFO proposals that don't meet the requirements concerning the minimum sales shelf life as set up for the item or customer. See the topic [Exclude lot numbers from FEFO Proposal](#) for more information.
13. In the **Expiration Item Attribute Name** field, select the required item attribute for which you want to configure the expiration setup.

### Note

Only item attributes with the **Type** field set to *Option* on the relevant **Item Attribute** card page can be used.

For more information, see the Item Attribute Expiration Setup topic that is explained below.

1. In the **Lot Production Date Caption** field, enter a custom label for the **Lot Production Date** field. The system replaces the default caption with the entered value. Once configured, the specified caption is consistently displayed across the following pages:

- Planned Production Order
- Firm Planned Production Order
- Released Production Order
- Assembly Production Order

The general setup for expiration management is now completed.

## Item Attribute Expiration Setup

You can set up configurations, such as values for minimum sales and purchase shelf life, FEFO inventory warning, for calculating dates for the expiration and expiration action calculation. To do that, follow these steps:

1. On the **Expiration Management Setup** page, in the **Expiration Item Attribute Name** field, select the required item attribute for which you want to set up configurations related to the minimum shelf life, FEFO inventory warning, and calculation of expiration and expiration action dates.

### Note

Only item attributes with the **Type** field set to *Option* on the relevant **Item Attribute** card page can be used.



1. On the action bar, select **Actions > Item Attribute Expiration Setup**.

The **Item Attribute Expiration Setup** page opens.

2. Enter the required information in the following fields:

Field	Description
Item Attribute Value	Select the required item attribute value for configuring the expiration setup. This field is filtered with item attribute values linked to the item attribute selected in the <b>Expiration Item Attribute Name</b> field on the <b>Expiration Management Setup</b> page.
Minimum Purchase Shelf Life	Enter the value for minimum purchase shelf life with a date formula. For more information, see <a href="#">Minimum Shelf Life</a> .
Minimum Sales Shelf Life	Enter the value for minimum sales shelf life with a date formula. This field is editable only when the <b>Source Type</b> field is set to <i>All Customers</i> and <i>Customers</i> . For more information, see <a href="#">Minimum Shelf Life</a> .
Expiration Action Calculation	Enter the value for expiration action calculation with a date formula. For more information, see <a href="#">Expiration Action Date</a> .
FEFO Inventory Warning	Select the appropriate option for FEFO inventory warning checks in the documents. For more information, see <a href="#">FEFO Inventory Warning</a> .
Production Date for Output	Select the appropriate date option based on which the expiration date should be calculated for production and assembly orders. The available options are blank, <i>Posting Date</i> , <i>Starting Date</i> , <i>Ending Date</i> , and <i>Lot Production Date</i> . The default option is <i>Posting Date</i> . For more information, see <a href="#">Expiration Date</a> .
Expiration Date Calc.	Select the appropriate date option based on which the expiration date should be calculated for purchase documents. The available options are blank, <i>Document Date</i> , and <i>Vendor Production Date</i> . For more information, see <a href="#">Expiration Date</a> .

## Alerts expiration management setup

Multiple alerts can be created in the Expiration Management extension. These alerts can for example be used to send an email with Microsoft Automate or trigger another process in an external system (using Azure Service Bus). Before being able to create alerts, it's necessary to define some additional expiration management settings.



1. Select the Search icon , enter **Expiration Management Setup** and then choose the related link.



The **Expiration Management Setup** page opens.

2. On the **Alerts** FastTab, turn on the **Enable Alerts** toggle.

This will create for example an alert when the expiration date is changed for a certain lot number and when receiving a lot number which didn't meet the FEFO Inventory requirement and/or the minimum purchase shelf life. See the topic [Expiration Management Alerts](#) for more information.

3. Enter the **Azure Service Bus URL**. This specifies the URL for the Expiration Management Alerts Azure function.

4. In the **Notification Service** field, select the type on which the alerts should be sent. The available options are:

- Azure Service Bus
- Http Endpoint

5. In the **Endpoints Alerts** field, enter endpoint alerts value. This field is editable if you have set the **Notification Service** field value as *Http Endpoint*.

6. In the **Authentication Type** field, select the method for authenticating and securing access. The available options are:

- Anonymous: If you select this option, you can request access with any user ID.
- Basic: If you select this option, you can request access only with the provided username and password. This field is editable if you have set the **Notification Service** field value as *Http Endpoint*.

7. In the **Username** field, enter the unique identifier assigned to you for authentication purposes. This is applicable only when *Basic* is selected as an authentication type. This field is editable if you have set the **Notification Service** field value as *Http Endpoint*.

8. In the **Password** field, enter the password. This field is editable if you have set the **Notification Service** field value as *Http Endpoint*.

9. The **Topic** field specifies the topic to which messages are sent. Messages are sent to a topic and delivered to one or more associated subscriptions.

10. The **Time to Live** field specifies the deadline after which content is no longer delivered, or the requested operation is no longer executed.

11. The **Number of Retries** field specifies the number of attempts to send an expiration management alert. After the retries fail, the circuit breaker will start and deliver the expiration management alert. See Aptean [Circuit Breaker](#) for more information. You can select two attributes which will be sent to the alerts.

12. Click the lookup button in the **Expiration Alert Item Attribute 1** field.

13. Select the required **Name**.

14. Click the lookup button in the **Expiration Alert Item Attribute 2** field.

15. Select the required **Name**.

16. The **Last Run Date Expired Alerts** specifies the last date the batch "Create Expired Expiration Management Alerts" has run.

17. In the **Failing Expiration Check** field, select the required option from the following:



- *Icon & Warning* – Select this option to trigger a warning when the minimum shelf life or FEFO inventory warning requirement is not met. This is the default option. Despite the warning, you can still be able to proceed with the process.
- *Icon & Error* - Select this option to trigger an error when the minimum shelf life or FEFO inventory warning requirement is not met. To proceed further in the process, you must resolve the error.  
For more information, see [Minimum Shelf Life](#) and [FEFO Inventory Warning](#).

The Alerts Expiration Management Setup is now completed.

## Icon setup

When using the Minimum Shelf Life Warning or the Inventory FEFO Warning, it is necessary to set up the icons that will be shown on the item tracking lines. When installing the module, default icons are set up. Afterwards the setup can be changed as described below.



1. Select the Search icon , enter **Icon Setup for Expiration Management** and then choose the related link.

The **Icon Setup for Expiration Management** page opens.

2. Click **Warning**.
3. Click **Choose** in the **Select Picture** dialog box.
4. Select an image.  
You can reset all icons to their default image.
5. On the action bar, click **Actions > Set Icons to Default**.
6. Click **Yes** in the dialog box, "**Your icons will be overwritten. Do you want to continue?**"

The icons are now reset to their default image.

The Icon Setup is now completed.



# Manual or automatic expiration date calculation

Article • 10/13/2025 • 5 min read

The expiration date is needed for executing checks concerning the minimum shelf life and FEFO inventory warnings. When creating a lot number in the item tracking Lines, a notification will be triggered when it is required to manually fill the expiration date. When this is not the case and the field Expiration Calculation is filled on the Item Card, the expiration date will be automatically calculated and shown.

## Manually enter an expiration date on the item tracking lines

To inform the user that it is required to fill the expiration date, a notification is shown when entering a new item tracking line. This notification is triggered when the **Require Expiration Dates** toggle is turned on, on the **Item Tracking Code Card** page of the item tracking code selected on the **Item Card** of the used item.



1. Select the Search icon , enter **Item Tracking Codes** and then choose the related link.

The **Item Tracking Codes** page opens.

2. Select the required **Code** to open the **Item Tracking Code Card** page
3. On the action bar, click **Edit** to edit the fields.
4. On the **Misc.** FastTab, the **Use Expiration Dates** toggle must be turned on for the extension to work correctly.

This specifies that items that use this item tracking code can have an expiration date and it enables checks for expiration dates.

5. Turn on the **\*\*Require Expiration Date Entry\*\*** toggle.  
This specifies that items that use this item tracking code must have expiration dates. It will also remind users to manually enter an expiration date when creating a lot number.

### Note

This toggle can only be turned on after turning on the **Use Expiration Dates** toggle.

6. On the **Purchase Order** page, on the **Lines** FastTab, on the action bar, click **Line > Item Tracking Lines**.

The **Item Tracking Lines** page opens.

7. On the action bar, click **Actions > Functions > Assign Lot No.**

The notification shows that it's required to manually enter an expiration date on the item tracking lines when assigning a lot number.



 Note

If the **Require Expiration Date Entry** toggle on the **Item Tracking Code Card** page is turned off, the functionality and notification remains same.

## Automatically calculate an expiration date on the item tracking lines

The **Expiration Date** field value for a lot number is automatically updated when you enter a value in the **Vendor Production Date** field on the **Item Tracking Lines** page and the value for it is calculated based on adding the expiration calculation to the document date when creating a new lot number.

The required setup includes the following steps:

- Enter a date formula in the **Expiration Calculation** field on the relevant **Item Card** page.
- Set the **Expiration Date Calc.** field to *Vendor Production Date* on the relevant **Expiration Setup** page.
- Turn off the **Require Expiration Date Entry** toggle on the relevant **Item Tracking Code Card** page for the item tracking code used for the item.
- The system calculates the **Expiration Date** field value using the formula: *Expiration Date = Vendor Production Date + Expiration Calculation date formula*
- Open the **Item Card**.

The **Expiration Calculation** field must be filled with a date formula, example "365D".

- Open the **Item Tracking Lines** on a **Purchase Order**.
- On the action bar, click **Actions > Functions > Assign Lot No.**

The **Expiration Date** is automatically calculated in the item tracking lines when creating a lot number, based on adding the expiration calculation to the document date.

## Assisted setup to change tracking setup for purchase items

To change the item tracking code follow the steps:

1. Navigate to **Assisted Setup > Change Tracking Setup for Purchase items**.

The **Change Tracking Setup for Purchase items** wizard opens.

2. Follow the instructions in the wizard to update the item tracking code.



The system turns off the **Require Expiration Date Entry** toggle on the **Item Tracking Code Card** page.

 Note

The **Item Tracking Code Wizard** page displays only the items for which the **Require Expiration Date Entry** toggle on the **Item Tracking Code Card** page is currently turned on.



# Calculations

Article • 10/13/2025 • 11 min read

## Expiration Date

The expiration date plays a vital role in ensuring product quality and safety. It serves as a reference point for conducting checks related to minimum shelf life and FEFO inventory warnings.

To calculate the expiration date, ensure the following prerequisites are configured.

- Turn on the **Use Expiration Dates** toggle on the relevant **Item Tracking Code Card** page.
- The **Expiration Calculation** field must contain a date formula on the relevant **Item Card** page. For example, the value in this field should be *25D* if the item's expiration is 25 days.

The expiration date is calculated using the following formula:

Expiration Date = X date + Expiration Calculation

The X date varies for each document type and is determined by the configurations set on the **Expiration Setup** page specific to the relevant item.

### Note

After calculation, the expiration date is displayed in the **Expiration Date** field on the line of the relevant **Item Tracking Lines** page.

## Purchase documents

For purchase documents, such as purchase orders, warehouse receipts, and inventory put-aways, the expiration date is calculated based on the document date or vendor production date. This is determined by the configuration set in the **Expiration Date Calc.** field on the **Expiration Setup** page specific to the relevant item.

The system determines the X date based on the following hierarchy:

- The system first checks for the value in the **Expiration Date Calc.** field on the **Based on Item** FastTab of the [Expiration Setup](#) page of the item.
- If it is left blank, the system then checks for the **Expiration Date Calc.** field on the **Based on Item Attribute** FastTab of the [Expiration Setup](#) page of the item.
- If both fields are left blank, the system considers the document date as the X date for expiration date calculation.



For the newly created lots, you can also change the expiration date even after it is calculated automatically. This option is available only for newly created lots added on the inbound documents such as purchase orders, warehouse receipts, and inventory put-aways.

### Document Date

When the **Expiration Date Calc.** field is set to *Document Date*, the system considers the source document date as the X date for expiration date calculation.

#### Note

According to the standard business central functionality, if the **Require Expiration Date Entry** toggle on the relevant **Item Tracking Code Card** page is turned on for the item, the system will not calculate the expiration date automatically. Instead, it should be manually entered in the **Expiration Date** field on the line of the relevant **Item Tracking Lines** page.

### Vendor Production Date

When the **Expiration Date Calc.** field is set to *Vendor Production Date*, the system considers the vendor production date specified on the item tracking lines as the X date for expiration date calculation. To calculate the expiration date, you should manually enter the vendor production date in the **Vendor Production Date** field on the **Item Tracking Lines** page.

The expiration date is automatically calculated upon entering the vendor production date if the **Require Expiration Date Entry** toggle on the relevant **Item Tracking Code Card** page is turned off.

#### Note

The value in the **Vendor Production Date** field in the item tracking lines is independent of the value in the **Expiration Date** field. Therefore, if the expiration date is manually changed after it has been calculated, the vendor production date will not adjust accordingly.

### Sales documents

For sales documents, such as sales orders, warehouse picks, warehouse shipments, and inventory picks, the system considers the planned delivery date as the X date for expiration date calculation. The date is obtained from the **Planned Delivery Date** field on the relevant sales order line.



## Production/Assembly orders

For production/assembly orders, the expiration date is calculated based on the posting date, starting date, ending date, or lot production date. This is determined by the configuration set in the **Production Date for Output** field on the [Expiration Setup](#) page specific to the relevant item.

The system determines the X date based on the following hierarchy:

- The system first checks for the value in the **Production Date for Output** field on the **Based on Item** FastTab of the [Expiration Setup](#) page of the item.
- If it is left blank, the system then checks for the **Production Date for Output** field on the **Based on Item Attribute** FastTab of the [Expiration Setup](#) page of the item.
- If both fields are left blank, the system considers the posting date as the X date for expiration date calculation.

### Posting Date

When the **Production Date for Output** field is set to *Posting Date*, the system considers the posting date of the production/assembly order as the X date for expiration date calculation.

### Starting Date

When the **Production Date for Output** field is set to *Starting Date*, the system considers the starting date as the X date for expiration date calculation.

For production orders, this date is obtained from the **Starting Date-Time** field of the last routing line associated with the production order. If the order does not have any routing lines, the date is obtained from the **Starting Date-Time** field from the relevant production/assembly order line.

For assembly orders, this date is obtained from the **Starting Date** field of the relevant **Assembly Order** page.

### Ending Date

When the **Production Date for Output** field is set to *Ending Date*, the system considers the ending date as the X date for expiration date calculation.

For production orders, this date is obtained from the **Ending Date-Time** field of the last routing line associated with the production order. If the order does not have any routing lines, the date is obtained from the **Ending Date-Time** field from the relevant production/assembly order line.

For assembly orders, this date is obtained from the **Ending Date** field of the relevant **Assembly Order** page.



## Lot Production Date

When the **Production Date for Output** field is set to *Lot Production Date*, the system considers the lot production date as the X date for expiration date calculation.

To calculate the expiration date, you should manually enter the date in the **Lot Production Date** field on the relevant production/assembly order line. For more information, see [Lot Origin Details](#).

### Note

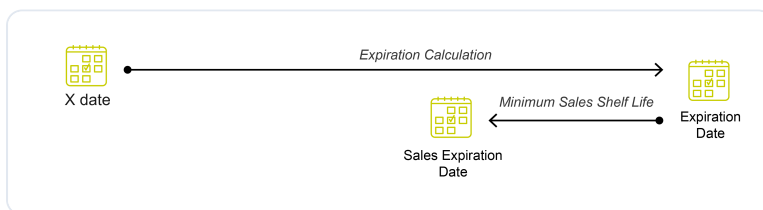
The value in the **Lot Production Date** field in the item tracking lines is independent of the value in the **Expiration Date** field. Therefore, if the expiration date is manually changed after it has been calculated, the lot production date will not adjust accordingly.

## Sales Expiration Date

The sales expiration date indicates the last date by which an item can be sold while meeting minimum shelf life requirements.

It is calculated by subtracting the minimum sales shelf life from the expiration date. The system considers the minimum sales shelf life from the [Expiration Setup](#) page specific to the relevant item based on the hierarchy. For more information, see [Minimum Shelf Life](#).

Sales Expiration Date = Expiration Date – Minimum Sales Shelf Life



### Note

The value for X date varies based on the setup and the type of document for which it is calculated.

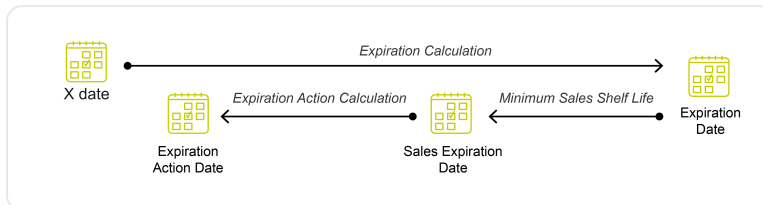
Once the document is posted, you can view this date in the **Sales Expiration Date** field on the relevant **Lot No. Information Card** page.



## Expiration Action Date

The expiration action date indicates the last date an action should be taken before an item becomes unsuitable for sale. It is calculated by subtracting the expiration action calculation from the sales expiration date.

Expiration Action Date = Sales Expiration Date – Expiration Action Calculation



### Note

The value for X date varies based on the setup and the type of document for which it is calculated.

The system determines the expiration action calculation based on the following hierarchy:

- The system first checks for the value in the **Expiration Action Calculation** field on the **Based on Item** FastTab of the [Expiration Setup](#) page of the item.
- If it is left blank, the system then checks for the **Expiration Action Calculation** field on the **Based on Item Attribute** FastTab of the [Expiration Setup](#) page of the item (defined in the expiration management setup).

Once the document is posted, you can view this date in the **Sales Expiration Date** field on the relevant **Lot No. Information Card** page.

### Note

The item reclassification journal can be used for various purposes, such as performing system transfers by reclassifying bin and location codes. When using this journal, you can specify a new lot number in the item tracking lines. If a new lot number is created or assigned, the expiration date, sales expiration date, and expiration action date will be copied from the original lot number to the new lot number. However, if you select an existing lot number instead of creating a new one, these dates will not be copied from the original lot to the selected existing lot.

To view the information on the **Lot No. Information Card** page, follow these steps:





1. Select the Search icon , enter **Lot No. Information List** and then choose the related link.

The **Lot No. Information List** page opens.

2. Select the required **Lot No.** to open the **Lot No. Information Card** page.

The **Expiration Date**, **Sales Expiration Date** and the **Expiration Action Date** fields are shown on the **General FastTab** of the **Lot No. Information Card** page.



# Minimum Shelf Life Warning

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The minimum shelf life refers to the period during which an item remains suitable for sale or use. This period is set for each item to help manage inventory effectively, reduce waste, and comply with regulatory standards.

The minimum shelf life should be set as a date formula on the relevant **Expiration Setup** page for a specific item or on the **Item Attribute Expiration Setup** page. For example, the value should be *25D* if the item's minimum shelf life is 25 days.

When using the minimum shelf life warning, it is necessary to configure the icons that will be displayed on the item tracking line. Default icons are set up when the extension is installed, but this configuration can be modified later. For more information, see [Expiration Management Setup](#).

The system determines the minimum shelf value based on the following hierarchy:

- The system first checks for the value in the **Minimum Purchase Shelf Life** or **Minimum Sales Shelf Life** field on the **Based on Customer/Vendor** FastTab of the [Expiration Setup](#) page of the item. There are specific hierarchies within the **Based on Customer/Vendor** FastTab that the system considers for the minimum shelf life value. For more information, see [Expiration Setup per Customer/Vendor](#).
- If the above configuration does not exist, the system checks for the value in the **Minimum Purchase Shelf Life** or **Minimum Sales Shelf Life** field on the **Based On Item** FastTab of the [Expiration Setup](#) page of the item.
- If it is left blank, the system then checks for the **Minimum Purchase Shelf Life** or **Minimum Sales Shelf Life** field on the **Based On Item Attribute** FastTab of the [Expiration Setup](#) page of the item. This can be defined on the **Item Attribute Expiration Setup** page which can be accessed through the [Expiration Management Setup](#) page.
- If it is also left blank, the system will not perform checks for minimum shelf life.

## Purchase documents

For purchase documents, such as purchase orders, warehouse receipts, and inventory put-aways, the system considers the minimum shelf life value from the **Minimum Purchase Shelf Life** field of the [Expiration Setup](#) page specific to the item or item attribute.

The system triggers a warning or an error when the date obtained by adding the minimum purchase shelf life value to the relevant posting or vendor production date does not fall before the expiration date. This check is performed when assigning a lot on the relevant **Item Tracking Lines** page. The following figure provides information on when the warning/error is triggered during the check to ensure the minimum purchase shelf life requirement is met.





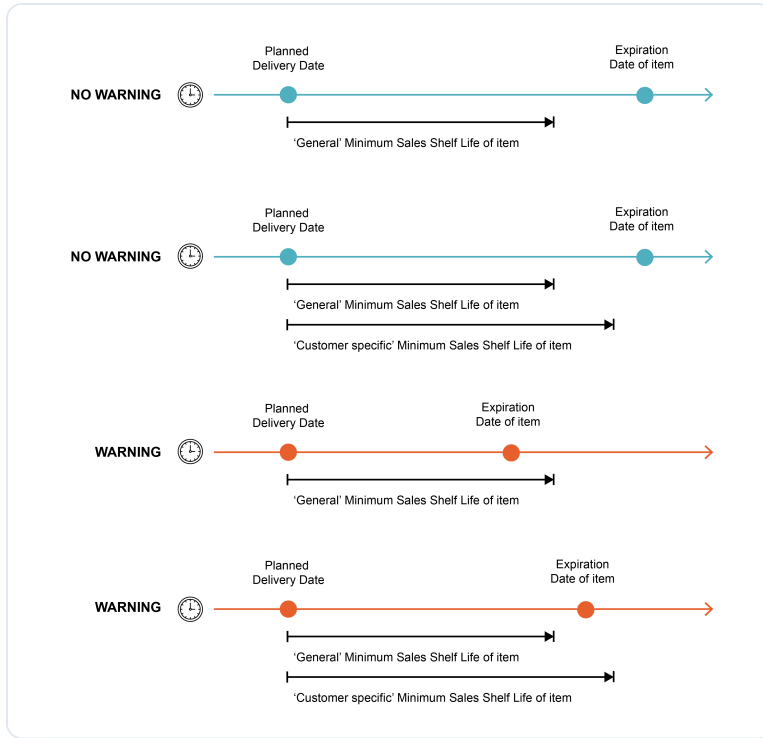
## Sales documents

For sales documents, such as sales orders, warehouse picks, warehouse shipments, and inventory picks, the system considers the minimum shelf life value from the **Minimum Sales Shelf Life** field of the [Expiration Setup](#) page specific to the item.

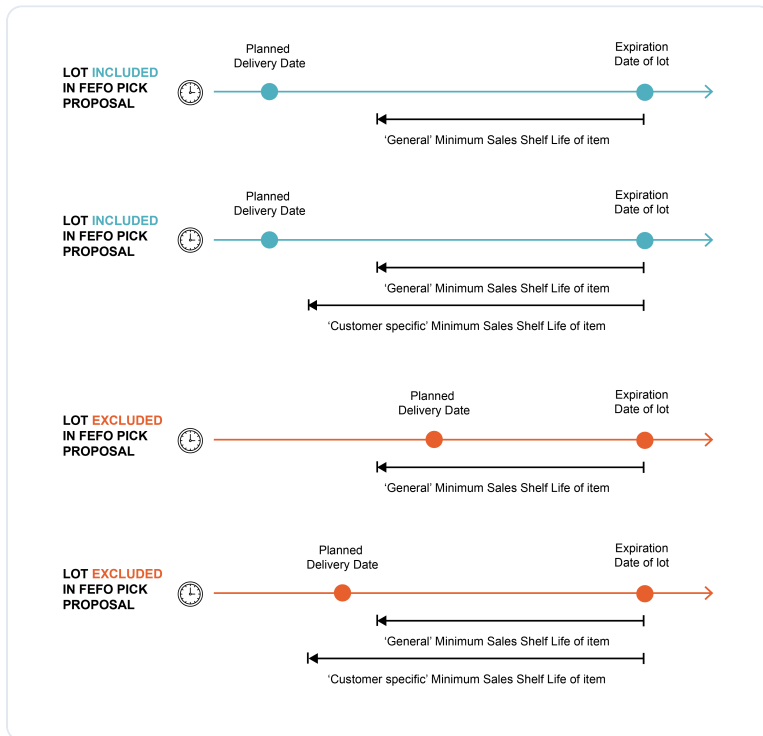
The system triggers a warning or an error when the date obtained by adding the minimum sales shelf life value to the relevant planned delivery date does not fall before the expiration date. This check is performed when selecting a lot on the relevant **Item Tracking Lines** page. The following figure provides information on when the warning/error is triggered during the check to ensure the minimum sales shelf life requirement is met.



# Expiration Management



The following image explains how the system checks concerning the minimum sales shelf life requirement when a lot is assigned.



When the minimum shelf life is not met, warnings/errors are triggered on the relevant **Item Tracking Lines** page, alerting users to take appropriate actions.



## Warning

When the **Failing Expiration Check** field is set to *Icon & Warning* on the **Expiration Management Setup** page, the system displays a warning to indicate that a lot number is received/shipped with an expiration date that does not meet the minimum shelf life requirement.

Also, a notification is displayed informing that one or more item tracking lines have a minimum shelf life warning.

The warnings are only informative, they do not block the process.

## Error

When the **Failing Expiration Check** field is set to *Icon & Error* on the **Expiration Management Setup** page, the system triggers an error to indicate that a lot number is received/shipped with an expiration date that does not meet the minimum shelf life requirement.

When this error occurs, you cannot close the **Item Tracking Lines** page. Also, you cannot post the document if the date determined for expiration calculation is changed after assigning a lot that does not meet the lot expiration date calculation.



# FEFO Inventory Warning

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The FEFO (First Expired, First Out) Inventory Warning enables checks to ensure that inventory is managed based on expiration dates. This value should be configured in the **FEFO Inventory Warning** field on the relevant **Expiration Setup** page specific to the relevant item.

The following options are available:

- *Blank* – The system will search for the next setup based on the hierarchy.
- *Yes* – The system will check for FEFO inventory warnings while assigning or selecting lots.
- *No* – The system will not consider FEFO inventory warnings while assigning or selecting lots.

The system determines the FEFO inventory value based on the following hierarchy:

- The system first checks for the value in the **FEFO Inventory Warning** field on the **Based on Customer/Vendor** FastTab of the [Expiration Setup](#) page of the item. There are specific hierarchies within the **Based on Customer/Vendor** FastTab that the system considers for the **FEFO Inventory Warning** field value. For more information, see [Expiration Setup per Customer/Vendor](#).
- If the above configuration is left blank, the system checks for the value in the **FEFO Inventory Warning** field on the **Based On Item** FastTab of the [Expiration Setup](#) page of the item.
- If the above configuration is left blank, the system then checks for the **FEFO Inventory Warning** field on the **Based On Item Attribute** FastTab of the [Expiration Setup](#) page of the item.
- If it is also left blank, the system will not perform checks for FEFO inventory warning.

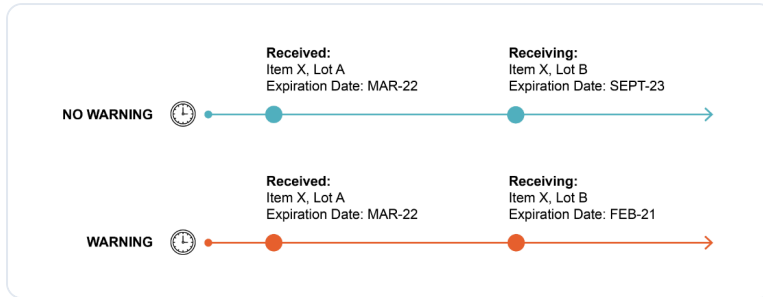
When using the FEFO inventory warning, it is necessary to configure the icons that will be displayed on the item tracking line. Default icons are set up when the extension is installed, but this configuration can be modified later. For more information, see [Expiration Management Setup](#).

## Purchase documents

For purchase documents, such as purchase orders, warehouse receipts, and inventory put-aways, the system verifies if the expiration date of a newly received lot from a vendor is earlier than the expiration date of any previously received lot.

If the check for the FEFO inventory warning condition is not met, the system triggers a warning or an error. This check is performed when assigning a lot on the relevant **Item Tracking Lines** page. The following figure provides information on when the warning/error is triggered during the check to ensure the FEFO inventory warning requirement is met.

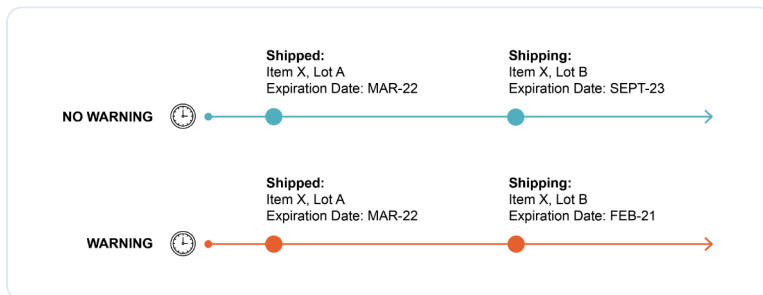




## Sales documents

For sales documents, such as sales orders, warehouse picks, warehouse shipments, and inventory picks, the system verifies if the expiration date of a newly sent lot to a customer is earlier than the expiration date of any previously sent lot to that customer.

If the check for the FEFO inventory warning condition is not met, the system triggers a warning or an error. This check is performed when selecting a lot on the relevant **Item Tracking Lines** page. The following figure provides information on when the warning/error is triggered during the check to ensure the FEFO inventory warning requirement is met.



## Warning

When the **Failing Expiration Check** field is set to *Icon & Warning* on the **Expiration Management Setup** page, the system displays a warning to indicate the expiration date of the new lot is earlier than the expiration date of any previously received/sent lot that does not meet the FEFO inventory requirement. Also, a notification is displayed informing that one or more item tracking lines have the FEFO inventory warning.

The warnings are only informative, they do not block the process.



## Error

When the **Failing Expiration Check** field is set to *Icon & Error* on the **Expiration Management Setup** page, the system triggers an error to indicate that a lot number is received/shipped with an expiration date that does not meet the minimum shelf life requirement.

When this error occurs, you cannot close the **Item Tracking Lines** page. Also, you cannot post the document if the date determined for expiration calculation is changed after assigning a lot that does not meet the lot expiration date calculation.



# Change Expiration Date

Article • 8/27/2025 • 4 min read

Before being able to change the expiration date of an existing lot, it is necessary to set up a journal template name and journal batch name. This is essential because the function to change the expiration date uses the Item Reclassification Journal for which a journal template and batch is used. See [Expiration Management Setup](#) for more information.

You can change the expiration date of an existing lot number. This can also be executed from within an external system using the API "Change Expiration Date". When using this API, the API Reason Code Expiration Date from the Expiration Management Setup page will be used.



1. Select the Search icon , enter **Lot No. Information List** and then choose the related link.

The **Lot No. Information List** page opens.

2. Select the required **Lot No.** to open the **Lot No. Information Card** page.
3. On the action bar, click **Actions > Change Expiration Date**.

The **Change Expiration Date** page opens.

4. Click **New Expiration Date** and select the new expiration date from the calendar.
5. Click **Reason Code** and select the reason for changing the expiration date, example, "API changed Expiration Date".
6. Enter a **Comment** if necessary.
7. Click **OK**.

The **Expiration Date** is changed and updated on the **Lot No. Information Card**.

- You can modify the **Expiration Date** field value on the **Lot No. Information Card** page for lots across multiple bins and multiple locations, if the locations are non-directed on the **Lot No. Information Card** page.
- When reservation entries exist for this lot number, it's not possible to change the expiration date. Clicking the link in the notification will open the specific reservation entries.
- When the lot number is placed on multiple bins and/or locations, it's not possible to change the expiration date. The Bin Contents List shows where the stock is located and will open when clicking on the link in the notification.
- When warehouse entries (pick and put-away) exist, the system will prompt you to confirm whether the updated expiration date should be reflected in the relevant warehouse entries. If you select *Yes*, the expiration date will be updated in the relevant entries. If you select *No*, the date will not be updated.



 Note

When an unplanned output item is added to the released production order line, the system automatically updates the **Lot Production Date** field with the current work date. This occurs when the **Lot Production Date** field value is part of the lot number (when the Apteon Lot Management extension is installed) or the expiration date (when the Apteon Expiration Management extension is installed) field values.



# Exclude lot numbers from FEFO Proposal

Article • 6/13/2024 • 4 min read

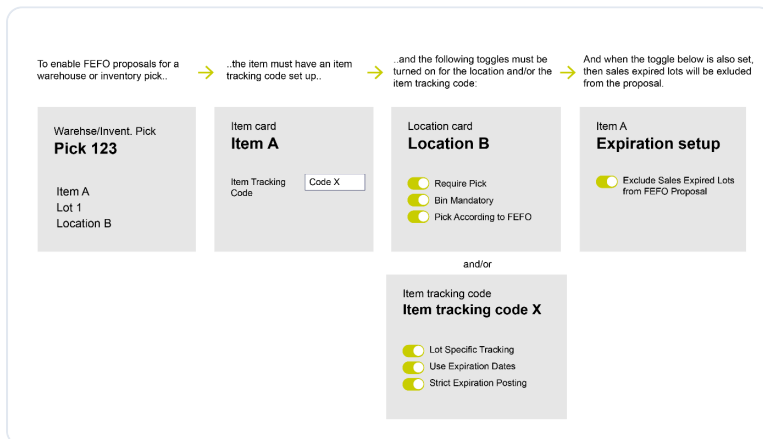
When creating an Inventory Pick or Warehouse Pick for a sales order, Dynamics 365 Business Central offers the possibility to pick items by FEFO. First-Expired-First-Out (FEFO) is a sorting method that ensures that the oldest items, those with the earliest expiration dates, are picked first. This functionality only works when the following criteria are met:

- The item must have a lot number.
- The item must be posted to inventory with an expiration date.
- If the **Pick According to FEFO** toggle on the location card is turned off, the **Lot Specific Tracking** and **Strict Expiration Posting** toggles on the relevant item tracking code setup must be turned on.
- If the **Strict Expiration Posting** toggle on the item tracking code card is turned off, the **Require Pick Bin Mandatory** toggle and **Pick According to FEFO** toggle on the Location Card must be turned on.
- The item can also be configured with the item attribute value on the **Item Attribute Expiration Setup** page.

To know how the expiration date is calculated, see [Expiration Date](#).

The system considers the minimum sales shelf life value based on the hierarchy on the **Expiration Setup** page of the item. To know more about the hierarchy, see [Minimum Shelf Life](#).

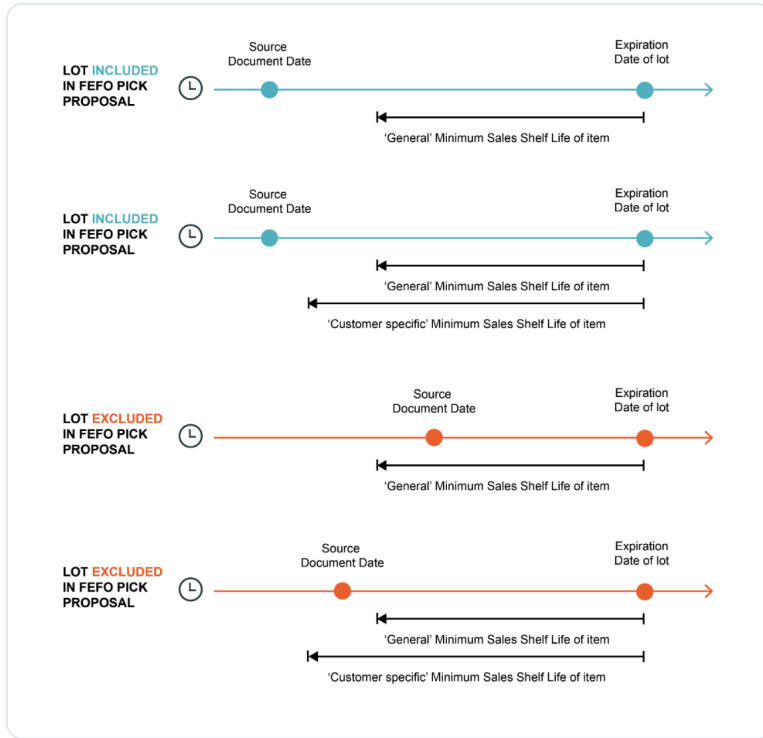
The required settings are shown in the image below:



When the criteria are met, the system will skip lot numbers under certain circumstances when assigning a lot number on the pick line. If the **Exclude Sales Expired Lots from FEFO Proposal** toggle is turned on in the **Expiration Management Setup** page, lot numbers that don't meet the requirements concerning the minimum sales shelf life (set up for the item or item-customer combination) will be excluded. The next figure gives an explanation of how the exclusion of (sales) expired lot numbers from the FEFO proposal works.



# Expiration Management



# Expiration Management Alerts

Article • 12/15/2023 • 6 min read

Multiple alerts are created in the Expiration Management extension. These alerts can for example be used to send an email with Microsoft Power Automate or trigger another process in an external system (using an Azure Service Bus). The following alerts are created:

- When the expiration date is changed for a certain lot number via the function Change Expiration Date.
- When receiving a lot number which didn't meet the FEFO inventory requirement.
- When receiving a lot number which didn't meet the minimum purchase shelf life requirement.
- When manually or automatically executing the batch function Create Expired Expiration Management Alerts and the expiration date expires on the work date.
- When manually or automatically executing the batch function Create Expired Expiration Management Alerts and the expiration action date expires on the work date.

## Batch Create Expiration Management Alerts

Before being able to create alerts, it's necessary to complete the expiration management setup. See [Expiration Management Setup](#) for more information.

The **Last Run Date Expired Alerts** field on the **Expiration Management Setup** page specifies the last date the batch Create Expired Expiration Management Alerts has run. The batch function Create Expired Expiration Management Alerts checks between the "last run date expired alerts" and the work date whether the expiration date or the expiration action date has expired.

When manually or automatically executing the batch function Create Expired Expiration Management Alerts, two alerts can be created per lot number. An alert is created when the expiration date expires on the work date that is used for the batch. Another alert is created when the expiration action date expires on the work date that is used for the batch.



1. Select the Search icon , enter **Create Expired Expiration Management Alerts** and then choose the related link.

The **Create Expired Expiration Management Alerts** page opens.

2. Click **OK** on the **Create Expired Expiration Management Alerts** dialog box to currently create the alerts.

You can schedule a report to run at a specific date and time. Scheduled reports are entered in the job queue and processed at the scheduled time, similar to other jobs. You can schedule a report when you open a report. Choose the Schedule action and enter the information. The report is then added to the job queue and will be run at the specified time. When the report is processed, the item will be removed from the job queue.



## View Expiration Management Alerts

The **Expiration Management Alerts** page helps you monitor and manage various expiration-related alerts for items tracked within the system.



Select the Search icon , enter **Expiration Management Alerts** and then choose the related link.

The **Expiration Management Alerts** list page opens with the following fields.

Field	Description
<b>Creation Date Time</b>	This field records the exact date and time when the alert was created.
<b>Item No.</b>	Specifies the number of the item in the alert.
<b>Item Description</b>	Specifies the description of the item in the alert.
<b>Variant Code</b>	Specifies the variant of the item on the line.
<b>Lot No.</b>	Specifies the lot number if the item carries such a number.
<b>Type</b>	Specifies which type of action the alert is created from.
<b>Document Type</b>	Specifies what type of document was posted to create the alert.
<b>Document No.</b>	Specifies the document number linked to the alert. The document is the voucher that the entry was based on, for example, a receipt.
<b>Vendor No.</b>	Specifies the number of the vendor in the alert.
<b>Name</b>	Specifies the name of the vendor in the alert.
<b>Item Attribute</b>	Specifies the item attribute value of the item, as set up on the Expiration Management page.
<b>Minimum Shelf Life</b>	Specifies the minimum duration set for the item's shelf life during purchase or sale, as set up on the Item Expiration Setup page.
<b>Expiration Date</b>	Specifies the current expiration date of the item carrying the item tracking number. The expiration date is the last date that the item can be used.
<b>New Expiration Date</b>	Specifies the new expiration date of the item carrying the item tracking number. The expiration date is the last date that the item can be used.



<b>Expiration Action Date</b>	Specifies the current expiration action date of the item carrying the item tracking number. The expiration action date is the date that a warning could be given to alert that the expiration date of the lot is approaching.
<b>New Expiration Action Date</b>	Specifies the new expiration action date of the item carrying the item tracking number. The expiration action date is the date that a warning could be given to alert that the expiration date of the lot is approaching.
<b>Reason Code</b>	Specifies the reason for changing the expiration date.
<b>Send Status</b>	Specifies the status of this line when using an Azure service bus.
<b>Result</b>	Specifies the result text when the send status is Failed.



# Audit Trail

Article • 12/15/2023 • 4 min read

The audit trail contains the records that chronologically log the changes made when inserting or changing the expiration dates. It provides a historical record of progression based on a sequence of events and it can be used for multiple purposes. The audit trail records contain details that include information about date, time, user information and type of change.



1. Select the Search icon , enter **Lot No. Information List** and then choose the related link.

The **Lot No. Information List** page opens.

2. Select the required **Lot No.** to open the **Lot No. Information Card** page.

3. On the action bar, click **Related > Lot No. > Audit Trail Entries**.

The **Audit Trail Entries** page opens.

The audit trail records contain details that include date, time, user information and type of change associated with the transaction.

- The column shows the **Date and Time**
- The column shows the **Type of Change**

DATE AND TIME	TYPE OF CHANGE	DATA TYPE	NAME
4/12/2019 2:25 PM	Modification	Field	Comment Change Expiration Date
4/12/2019 2:25 PM	Modification	Field	Reason Code Change Expiration Date
4/12/2019 2:25 PM	Modification	Field	Expiration Action Date
4/12/2019 2:25 PM	Modification	Field	Sales Expiration Date
4/12/2019 2:25 PM	Modification	Field	Expiration Date
4/12/2019 2:23 PM	Modification	Field	Expiration Action Date
4/12/2019 2:23 PM	Modification	Field	Sales Expiration Date
4/12/2019 2:23 PM	Modification	Field	Expiration Date

- The column shows the **Name** of the field that is changed

The audit trail records contain details that include the old value and new value associated with the transaction.



## Expiration Management

OLD VALUE	NEW VALUE
	Manually changed because Expiration Date was en...
	MANUAL
2020-02-01	2020-11-14
2020-02-15	2020-11-28
2020-07-15	2021-04-28
	2020-02-01
	2020-02-15
	2020-07-15

- The column shows the **Old Value**
- The column shows the **New Value**



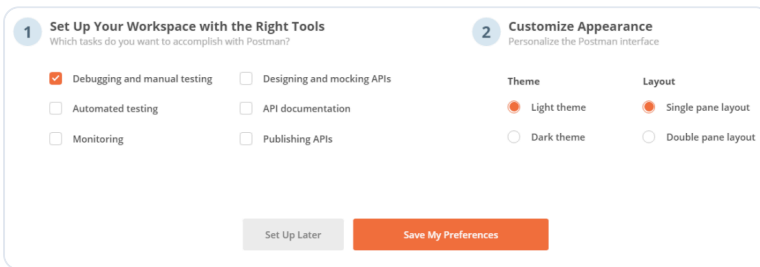
# Postman Instructions to test Aptean Food and Beverage APIs

Article • 4/3/2023 • 14 min read

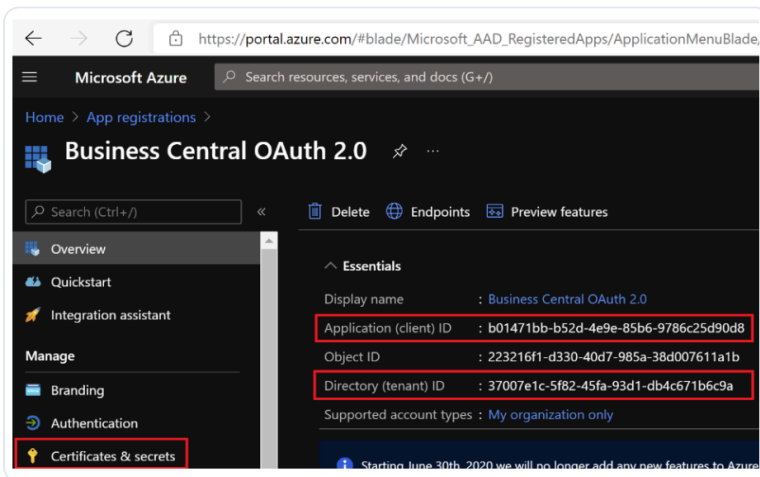
This topic describes the setup and initialization of Postman and the corresponding work instructions to test the released Aptean Food and Beverage APIs on your Business Central environment.

## Prerequisites

1. The latest version of Postman app can be downloaded [here](#).
  - a. Postman account (free or Gmail) must be created.
  - b. Set up Workspace for **Debugging and manual testing**.
  - c. Team creation is not mandatory.



2. Get app registration information to be able to authenticate by using **OAuth** against your Business Central Online environment or create one as described in the Microsoft documentation.
  - a. Create an app registration using the instructions [here](#).
  - b. Setup the app registration using the instructions [here](#).
  - c. Start using **OAuth** in Postman API requests using the instructions [here](#).

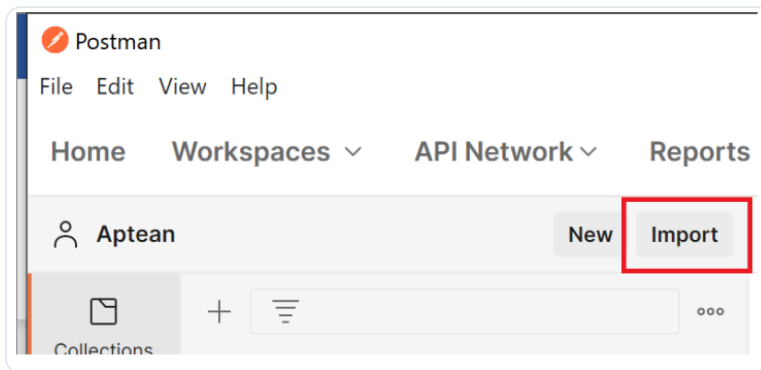



### Important

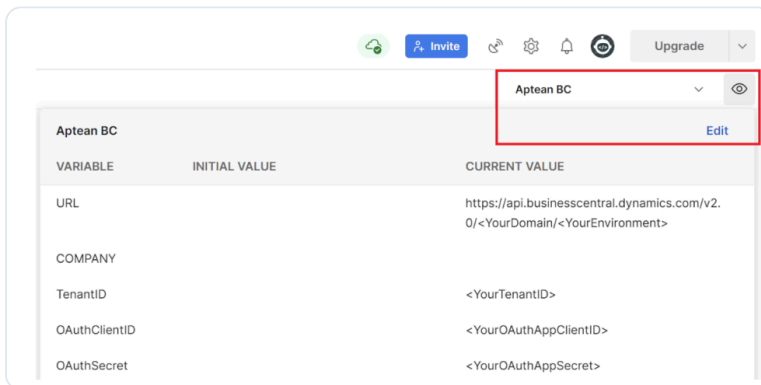
Save the **Client ID**, **Tenant ID** and **Secret** for setup of the Postman environment variables as next steps.

## Import and configure Postman Environment

1. Download the latest version of Postman Aptean BC Environment Variables [here](#).
  - a. Select **Import** and import the **Aptean BC.postman\_environment.json** file.

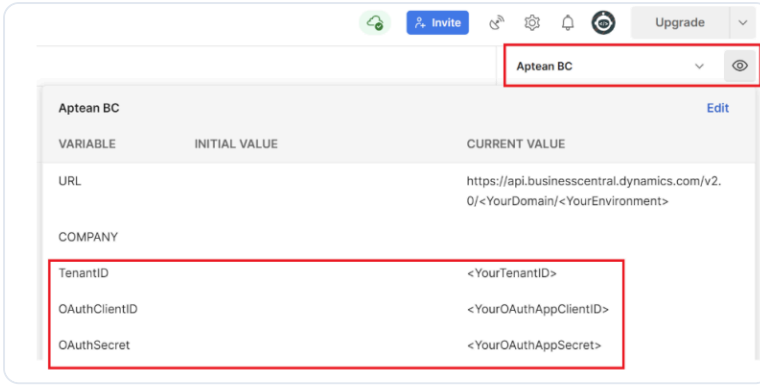


- b. Select the **Aptean BC** environment. Click the Environment quick look icon  and then click **Edit** to set the current values for variables.



- c. Set your **Domain** or **TenantID** and your **Environment name** to be used as current value for URL.
      - d. To be able to use the **OAuth** Authorization, set the earlier saved **TenantID**, **ClientID** and **Secret** of the app registration in the Postman Environment variables.



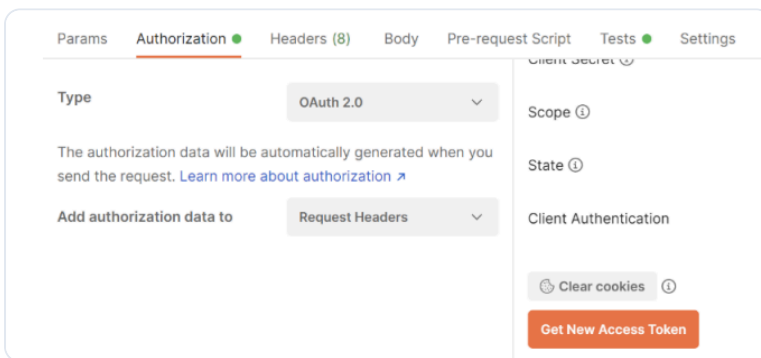


## Note

For all example requests, these will now be used as the default values to authorize by using **OAuth**.



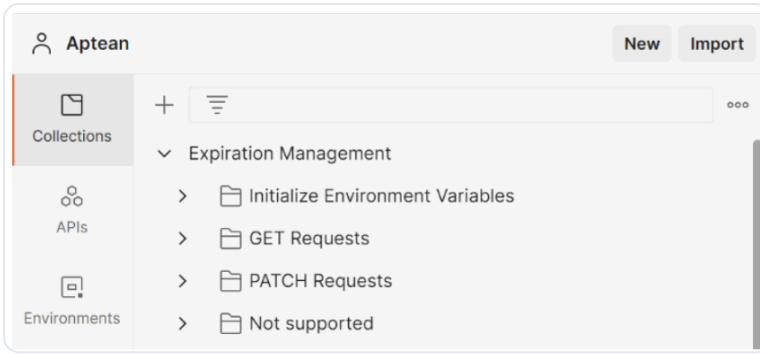
Using the **Get New Access Token** button, the **Bearer Token** should become available to be used in your requests.



## Import Postman Requests Collection

1. Download the latest version of Postman Apteian Expiration Management Requests Collection [here](#).
  - a. **Import** again and import the **Apteian Expiration Management.postman\_collection.json** file. Open **Collections** to find all provided requests.

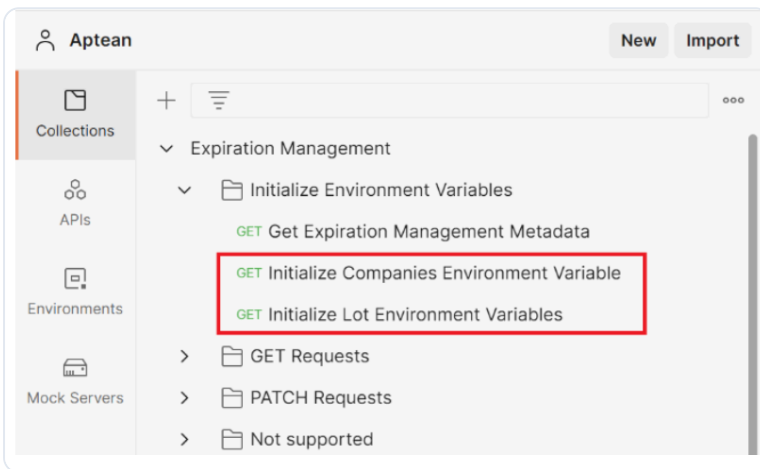




2. Initialize your environment variables by running the **GET Requests**.

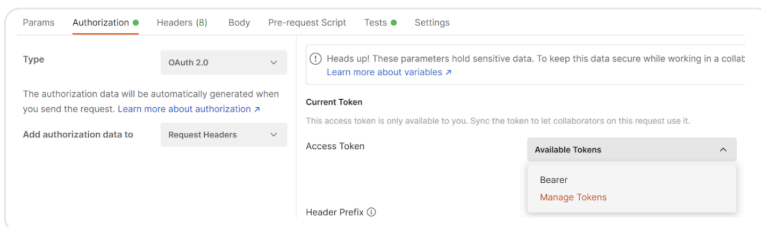
a. Initialize Companies Environment Variables

b. Initialize Lot Environment Variables

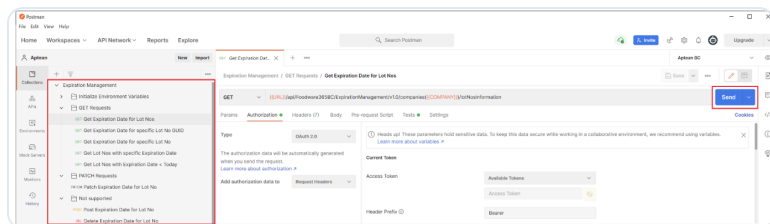


## Important

Make sure to get a (new) **Bearer Token** for authentication as described in the previous steps to be able to send requests.



1. Now it is possible to test all provided requests and see the response messages.



## Important

When a **PATCH**, **POST** or **DELETE** request is sent, some lot environment variables must be re-initialized. In this case first send the **Initialize Lot Environment Variables** request again before proceeding with your tests.



# Integrations

Article • 5/21/2025 • 1 min read

The Aptean Expiration Management extension has been integrated with the following extensions:

- [Aptean Lot Management](#)
- [Aptean Shop Floor Production](#)
- [Aptean Beverage Advanced Warehouse Management](#)
- [Aptean Beverage Foundation Management](#)



# Aptean Lot Management

Article • 5/21/2025 • 1 min read

When the Aptean Expiration Management extension is used in conjunction with the Aptean [Lot Management](#) extension, you can:

- Use the lot production date and vendor production date for expiration calculations.
- Set up the production date or expiration date as date elements on the **Lot No. Profile** page. For more information, see [Manage lot number profiles](#).
- Change the expiration date for lots on the **Lot No. Information Card** page.
- Filter lots by expiration date on the **Lot No. Information List** page. For more information, see [View lot number information on a tablet](#).
- View the expiration details of lots on the **Lot Details** FactBox. For more information, see [View lot details on FactBoxes](#).



# Aptean Shop Floor Production

Article • 5/21/2025 • 1 min read

When the Aptean Expiration Management extension is used in conjunction with the Aptean [Shop Floor Production](#) extension, the system can use the calculation for the expiration date in the Aptean Shop Floor Production Power App. For more information, see [Shop floor production setup](#).



# Aptean Beverage Advanced Warehouse Management

Article • 5/21/2025 • 1 min read

When the Aptean Expiration Management extension is used in conjunction with the Aptean Beverage [Advanced Warehouse Management](#) extension, you can modify the **Expiration Date** field value for items assigned with advanced warehouse management license plates using the **Change Expiration Date** action on the **Lot No. Information Card** page.



# Aptean Beverage Foundation Management

Article • 5/21/2025 • 1 min read

When the Aptean Expiration Management extension is used in conjunction with the Aptean [Beverage Foundation Management](#) extension, Drink-IT Edition, the shelf-life validation logic has been adjusted to bypass expiration checks when executing the **Correct Financial** action on the **Posted Sales Invoice** page. This ensures that shelf-life date formula validations do not block financial corrections. For more information, see [Integration with Aptean Expiration Management](#).

