

# User Manual

# Aptean Food and Beverage ERP

**Lot Management**

Product Documentation



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# Release notes

Article • 3/25/2026 • 3 min read

To view what's new or changed in each release of the Aptean Lot 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>	Platform release
February 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
January 2026	<a href="#">2509.3.0.0</a>	Platform release
November 2025	<a href="#">2509.2.0.0</a>	Stability release
October 2025	<a href="#">2509.1.0.0</a>	Stability release
October 2025	<a href="#">2509.0.0.0</a>	Feature release
September 2025	<a href="#">2508.2.0.0</a>	Stability release
August 2025	<a href="#">2508.1.0.0</a>	Platform release
August 2025	<a href="#">2508.0.0.0</a>	Feature release
August 2025	<a href="#">2507.1.0.0</a>	Stability release
July 2025	<a href="#">2507.0.0.0</a>	Feature release
July 2025	<a href="#">2506.2.0.0</a>	Stability release
July 2025	<a href="#">2506.1.0.0</a>	Stability release
July 2025	<a href="#">2506.0.0.0</a>	Feature release
July 2025	<a href="#">2505.0.0.0</a>	Feature release
June 2025	<a href="#">2504.0.0.0</a>	Feature release
May 2025	<a href="#">2503.1.0.0</a>	Stability release



May 2025	<a href="#">2503.0.0.0</a>	Feature release
May 2025	<a href="#">2502.1.0.0</a>	Stability release
April 2025	<a href="#">2502.0.0.0</a>	Feature release
April 2025	<a href="#">2501.2.0.0</a>	Stability release
March 2025	<a href="#">2501.1.0.0</a>	Stability release
March 2025	<a href="#">2501.0.0.0</a>	Feature release
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April 2023	<a href="#">1.20.93908.0</a>	Stability release
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August 2022	<a href="#">1.8.55203.0</a>	Stability release
July 2022	<a href="#">1.8.53971.0</a>	Feature release
April 2022	<a href="#">1.8.47554.0</a>	Stability release



## Lot Management

April 2022	<a href="#">1.8.47315.0</a>	Feature release
February 2022	<a href="#">1.7.43604.0</a>	Stability release



# 2601.4.0.0

Release Note • 3/25/2026 • 2 min read

## Enhancements/Modifications

With this release of the Aptean Lot Management extension,

- The system ensures that when the **Tracking Status** field value shows as *Incomplete* in a finished production order due to minimum remaining quantity consumption, the **Assigned Lot(s)** field value correctly displays the consumed lot details.
- The system supports enhanced lot number generation using the *Incremental Suffix* and *Document Line No.* options in the **Element** field on the **Lot No. Profile** page.
- You can use the **Lot Increment Per** field value to control the suffix at the document or document line level. The system ensures the next valid suffix by checking existing records and creates lot information during posting to avoid unused numbers.  
Additionally, the system re-evaluates lot number profiles each time it assigns lot numbers, so your changes apply immediately.

## UI/ UX changes

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

- The **Lot Increment Per** field has been added to the **General** FastTab on the **Lot Management Setup** page.
- The *Incremental Suffix* and *Document Line No.* options have been added to the **Element** field on the **Lot No. Profile** page.

## Resolved issues

The following issues have been resolved in this release.

ID	Description
361483	The system fails to update the <b>Lot No.</b> field value based on the recalculated expiration date on the <b>Item Tracking Lines</b> page when the <b>Expiration Date Calc.</b> field value is set to <b>Vendor Production Date</b> on the <b>Expiration Setup</b> page and the <b>Vendor Production Date</b> field value is updated.
357446	The system incorrectly displays the <b>Item Tracking Status</b> field value as <i>Complete</i> and carries forward the previously posted lot number on the <b>Firm Planned Production Order</b> page when copying a



released production order number that has already been posted. This issue also occurs on the **Planned Production Order** page.



# 2601.3.0.0

Release Note • 2/26/2026 • 1 min read

## Enhancements/Modifications

With this release of the Aptean Lot Management extension, the following changes have been made to ensure compatibility with Business Central, version 28.

- The deprecated *InitFromPurchLine* procedure on the *Tracking Specification* record has been replaced with the *InitFromPurchLine* procedure from the standard *Purch. Line-Reserve* codeunit in the *ItemTrackingMgtFDW* codeunit.
- The deprecated *InitFromProdOrderLine* procedure on the *Tracking Specification* record has been replaced with the *InitFromProdOrderLine* procedure from the standard *Prod. Order Line-Reserve* codeunit in the *LotNoProfileMgtFDW* codeunit.



# 2601.2.0.0

Release Note • 2/25/2026 • 1 min read

## Resolved issues

The following issues have been resolved in this release.

ID	Description
344471	The system fails to refresh the <b>Lot No.</b> field value on the <b>Transfer Order</b> and the <b>Warehouse Shipment</b> pages after executing the <b>Undo Shipment</b> action in the posted transfer shipment and deleting the <b>Lot No.</b> field value from the item tracking lines.
354987	The system fails to populate the <b>Vendor Lot No.</b> and <b>Traceability Source Reference</b> field values in the <b>Lot Origin Detail</b> record on the <b>Lot No. Information Card</b> page when producing output with the <b>Copy Prod Lot Details to Origin</b> toggle on the <b>Lot Management Setup</b> page turned on.



# 2601.1.0.0

Release Note • 1/28/2026 • 1 min read

## Enhancements/Modifications

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

## Resolved issues

The following issue has been resolved in this release:

ID	Description
341133	The system incorrectly updates the lot origin details on the <b>Lot Origin Details</b> page when posting multiple item tracking lines.



# 2601.0.0.0

Release Note • 1/28/2026 • 1 min read

## Resolved issues

The following issue has been resolved in this release.

ID	Description
347286	The system incorrectly clears the assigned lot numbers after closing the item tracking page when creating negative consumption entries for lot-tracked items on production orders. As a result, the tracking status incorrectly displays as <i>Incomplete</i> , which prevents posting negative consumption entries from both production order components and the production journal.



# 2509.3.0.0

Release Note • 1/8/2026 • 1 min read

## Enhancements/Modifications

With this release of the Aptean Lot Management extension, the *OnAfterSetItemTrackingBasedOnQty* integration event has been added to the *ItemTrackingMgtFDW* codeunit to allow overwriting the calculation logic and updating the **Item Tracking** field value in the document lines.



# 2509.2.0.0

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

## Enhancements/Modifications

With this release of the Apteian Lot 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
333369	An error occurs on the <b>Firm Planned Prod. Order</b> page when the <b>Source Type</b> field value is set to <i>Family</i> . This issue occurs when the system fails to update the <b>Element</b> field value from the <b>Lot No. Profile</b> page when executing the <b>Assign Lot No.</b> action on the <b>Item Tracking Lines</b> page.



# 2509.1.0.0

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

## Resolved issues

The following issue has been resolved in this release.

ID	Description
325600	The system incorrectly displays a value in the <b>Expired Details</b> field on the <b>Lot Details</b> FactBox of the <b>Item Tracking Lines</b> page even when the associated lots are fully assigned.



# 2509.0.0.0

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

## Features

With the features added in this release of the Aptean Lot Management extension, you can:

- Configure item-level requirements for country of origin tracking to ensure compliance with regulatory and quality standards.
- Create and manage allowed countries of origin by vendor, item, and variant combinations to control valid source locations. For more information, see [Allowed countries of origin](#).
- Automatically populate document-specific allowed countries based on predefined hierarchies to streamline data entry and reduce errors, and track the country of origin through the entire supply chain from receipt to lot information cards for complete traceability. For more information, see [Lot origin details](#).

## UI/UX changes

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

- The **Allowed Countries of Origin** page has been added.
- The **Allowed Countries of Origin** action has been added to the following pages:
  - Item Card
  - Vendor Card
  - Purchase Order
  - The **Require Country of Origin** toggle has been added to the **Item Tracking** FastTab on the following pages:
    - Item Card
    - Item Template



# 2508.2.0.0

Release Note • 9/24/2025 • 2 min read

## Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean EDI extension. To know more, see [What's new in EDI, version 2514.0.0.0](#).

## Resolved issues

The following issues have 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="#">Expiration Management</a> extension is installed.
315595	An error occurs on the <b>Warehouse Receipt</b> page when executing the <b>Get Source Documents</b> action and selecting the purchase return order for an item with negative quantity.
326541	The system fails to clear the <b>Vendor Production Date</b> field value on the <b>Item Tracking Lines</b> page for a purchase order when modifying the <b>Lot No.</b> field value.
325676, 324522, 324271	The system incorrectly updates the <b>Item Tracking</b> field value as <i>Incomplete</i> on the lines of outbound transaction documents even when item tracking is assigned for the total quantity. This issue occurs when the <b>Require Expiration Date Entry</b> toggle on the associated <b>Item Tracking Code Card</b> page is turned on.



# 2508.1.0.0

Release Note • 8/27/2025 • 1 min read

## Enhancements/Modifications

With this release of the Apteon Lot Management extension, the references of the *NoSeriesManagement* codeunit has been removed from the *CreatePSDocFromRecall08FDW* codeunit, to ensure compatibility with Business Central, version 27.



# 2508.0.0.0

Release Note • 8/27/2025 • 1 min read

## Features

With this release of the Aptean Lot Management extension, the system:

- Retains the **Item Tracking** field value as *Incomplete* on the source document lines if a lot or license plate is required but not yet assigned. Further, the system updates the item tracking status to *Complete* only when all required lot and license plate details are entered.
- Requires an expiration date entry when the item tracking code is configured accordingly. It updates the item tracking status to *Complete* only when the lot, license plate, and expiration date values are entered.

For more information, see [Manage item tracking](#).



# 2507.1.0.0

Release Note • 8/27/2025 • 1 min read

## Resolved issues

The following issues have been resolved in this release.

ID	Description
315666	The system incorrectly updates the <b>Expiration Date</b> field values for all lines on the <b>Item Tracking Lines</b> page. This issue occurs when updating the <b>Vendor Production Date</b> field value for a specific lot number on the <b>Item Tracking Lines</b> page.
300821	The system incorrectly displays an error message when the <b>Element</b> field value is set to <i>Work-/Machinecenter Element</i> , and the <b>Value</b> field value is left blank on the <b>Lot No. Profile</b> page.



# 2507.0.0.0

Release Note • 7/30/2025 • 1 min read

## Enhancements/Modifications

With this release of the Aptean Lot Management extension, the system does not display the **Lot Origin Details** section on the FactBox of the **Inventory Overview** page for users with the indirect permission set.

### Note

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



# 2506.2.0.0

Release Note • 7/3/2025 • 1 min read

## Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Apteian Expiration Management extension. To know more, see [What's new in Expiration Management, version 2504.4.0.0](#).



# 2506.1.0.0

Release Note • 7/2/2025 • 1 min read

## Resolved issues

The following issue has been resolved in this release.

ID	Description
302675	The system does not allow to select the existing lot number in the <b>Lot No.</b> field on the <b>Lot No. List</b> page for the outbound transactions. This issue occurs when the <b>Permit Lot Selection for Positive Adjustments</b> toggle on the <b>Lot Management Setup</b> page is turned on.



# 2506.0.0.0

Release Note • 7/2/2025 • 1 min read

## Features

With the feature added in this release of the Apteian Lot Management extension, you can define how the lot number is previewed on the **Shop Floor Production Setup** page. For more information, see [Set up shop floor production](#).

## Integrations

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



# 2505.0.0.0

Release Note • 7/2/2025 • 2 min read

## Features

With the features added in this release of the Aptean Lot Management extension,

- The system resets the number series to the starting number when it has reached the last number if the **Reset No. Series** checkbox is selected on the **Lot No. Profile** card page. For more information, see [Set up lot number element series](#).
- You can export the recall information (consisting of all inbound, outbound, and production transactions) to an Excel document. For more information, see [Export recall information](#).
- You can find existing entries and documents based on the document number and posting date of a document from the **Recall** card page. For more information, see [Create recalls](#).

## Enhancements/Modifications

With this release of the Aptean Lot Management extension, the system excludes negative production and negative consumption when calculating the **Total Qty.** field value on the **Lots** FastTab of the **Recall** card page. Additionally, you can select the **On-Hand Qty.** field value to view the related item ledger entries.

This enhancement addresses the issue reported in bug ID #291987. For more information, see [Create recalls](#).

## UI/UX changes

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

- The **Export** and **Find Entries** actions have been added to the **Recall** card page.
- The **Reset No. Series** checkbox has been added to the **Lot No. Profile** card page.
- The **Remaining Qty.** field has been renamed to **On-Hand Qty.** on the **Lots** FastTab of the **Recall** card page.

## Resolved issues

The following issues have been resolved in this release.

ID	Description
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290151	The system fails to update the <b>Lot No. Filter</b> field value when the <b>Vendor Lot No. Filter</b> field value is entered manually on the <b>Item Tracing</b> page.
291987	The system incorrectly updates the <b>Total Qty.</b> field value on the <b>Lots</b> FastTab of the <b>Recall</b> card page, by including negative production and negative consumption in the calculation.



# 2504.0.0.0

Release Note • 6/4/2025 • 1 min read

## Enhancements/Modifications

With this release of the Apteon Lot Management extension, the dependency on the Apteon [Standard Measurements](#) extension has been removed. Businesses can use the Apteon Lot Management extension independently without requiring the installation of the Apteon Standard Measurements extension.



# 2503.1.0.0

Release Note • 5/21/2025 • 1 min read

## Enhancements/Modifications

With this release of the Aptean Lot Management extension, you can assign slaughter dates on item tracking lines during inventory posting, ensuring accurate traceability from receiving to consumption. For more information, see [Item tracking and lot management](#).

## Integrations

The Aptean Lot Management extension has been integrated with the Aptean [Protein Essentials](#) extension. For more information, see [Integrations](#).

## Resolved issues

The following issue has been fixed in this release.

ID	Description
284600	An error occurs when selecting a value in the <b>Expiration Date</b> field on the <b>Item Tracking Lines</b> page if the associated purchase order number exceeds 10 characters. This issue occurs when the related <b>Lot No. Profile</b> page is configured to include the expiration date.



# 2503.0.0.0

Release Note • 5/21/2025 • 2 min read

## Features

With the features added in this release of the Apteian Lot Management extension, you can use the recall functionality to improve item traceability and support regulatory compliance. For more information, see [Manage recalls](#).

In the event of a product recall, you can take corrective action, track affected items, and generate necessary documents, such as purchase return orders and sales credit memos to communicate efficiently with trading partners.

### Note

This functionality supports compliance with the Food Safety Modernization Act (FSMA) regulations implemented by the U.S. Food and Drug Administration (FDA).

## Integrations

The Apteian Lot Management extension has been integrated with the following extensions:

- Apteian [Claims](#)
- Apteian [Commodity Harvest](#)

For more information, see [Integrations](#).

## UI/UX changes

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

- The **Recalls** list and the **Recall** card pages have been added.
- The **Create Recall** action has been added to the **Item Tracing** page.
- The following fields have been added to the **Lot Management Setup** page.
  - Copy Production Lot Details to Lot Origin Details
  - View Traceability Source Reference
  - Recall Nos.
- The **Traceability Source Reference** field has been added to the following pages:



## Lot Management

- Item Tracking Lines
  - Lot No. Information Card
  - Lot Origin Details
- The **GLN** field has been added to the **Location Card**, **Order Address**, and **Farm** pages.



# 2502.1.0.0

Release Note • 5/7/2025 • 1 min read

## Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Apteian Sublot Management extension. For more information, see [What's new in Sublot Management, version 2401.1.0.0](#).



# 2502.0.0.0

Release Note • 4/9/2025 • 2 min read

## Features

With the features added in this release of the Apteon Lot Management extension, you can generate lot numbers based on the expected receipt date specified in purchase orders, providing greater flexibility in lot number creation.

## Enhancements/Modifications

With this release of the Apteon Lot Management extension, the system evaluates the item tracking status based on the configured overdelivery and underdelivery thresholds. When these thresholds are defined on the **Item Card** page, the system checks the **Qty. to Receive** and **Quantity** field values and updates the **Item Tracking** field value on the **Item Card** page. For more information, see [Create Lot No. with Lot No. Profile](#).

## UI/UX changes

The *Expected Receipt Date* option has been added to the **Use Date** field on the **Lot No. Profile** page.

## Resolved issues

The following issue has been resolved in this release.

ID	Description
262082	An error occurs when posting the item journals for items with the <b>Lot No. Profile</b> field value set to <i>Expiration Date</i> and the <b>Expiration Calculation</b> field value left blank. This issue arises when the <b>Use Expiration Dates</b> and <b>Require Expiration Dates</b> toggles on the <b>Item Tracking Code Card</b> page are turned on, and the <b>Item Tracking Code</b> field on the <b>Item Card</b> page is configured.



# 2501.2.0.0

Release Note • 4/9/2025 • 1 min read

## Features

With the features added in this release of the Apteon Lot Management extension, you can select existing lot numbers for positive transactions on the following pages when the **Permit Lot Selection for Positive Transactions** toggle on the **General** FastTab of the **Lot Management Setup** page is turned on.

- Physical Inventory Journals
- Item Journals
- Release Production Order
- Purchase Order
- Warehouse Receipt

## UI/UX changes

The **Permit Lot Selection for Positive Transactions** toggle has been added to the **General** FastTab of the **Lot Management Setup** page.



# 2501.0.0.0

Release Note • 3/12/2025 • 1 min read

## Resolved issues

The following issue has been resolved in this release.

ID	Description
267221	An error occurs on the <b>Details</b> screen while assigning a lot number on the Aptean Mobile Warehouse app, when the <b>Lot No. Profile</b> field value is set to <i>Expiration Date</i> and the <b>Expiration Calculation</b> field is left blank on the <b>Item Card</b> page. This issue occurs when the Aptean <a href="#">Mobile Warehouse Registration</a> extension is installed.



# 2408.11.0.0

Release Note • 3/7/2025 • 1 min read

## Resolved issues

The following issues have been resolved in this release.

ID	Description
267467, 273119	An error occurs upon executing the <b>Assign Lot No.</b> action on the <b>Item Tracking Lines</b> page. This issue occurs when the <b>Lot No. Profile</b> field is not set to <i>Expiration Date</i> and the <b>Expiration Calculation</b> field is left empty on the <b>Item Card</b> page.
267671	An error occurs upon executing the <b>Create License Plates</b> action on the <b>Item Tracking Lines</b> page. This issue occurs when the <b>Use Date</b> field value is set to <i>Work Date</i> on the <b>Lot No. Profiles</b> page and the Aptean <a href="#">License Plating</a> extension is installed.



# 2408.10.0.0

Release Note • 2/26/2025 • 1 min read

## Resolved issues

The following issues have been resolved in this release.

ID	Description
266721	The system incorrectly displays <i>Multiple Lots</i> in the <b>Assigned Lot(s)</b> field of the sales order line even when a single lot is assigned on the <b>Item Tracking Lines</b> page.
269512	The system incorrectly displays the <b>Expired Inventory</b> field value on the <b>Lot Details</b> FactBox of the <b>Item Tracing</b> page even when the lot is not expired.



# 2408.9.0.0

Release Note • 2/25/2025 • 1 min read

## Resolved issues

The following issue has been resolved in this release.

ID	Description
266168	The system incorrectly assigns the lot number on the <b>Item Tracking Lines</b> page based on the expiration date instead of the work date, despite the configuration on the <b>Lot No. Profile</b> page.



# 2408.8.0.0

Release Note • 2/19/2025 • 1 min read

## Resolved issues

The following issue has been resolved in this release.

ID	Description
264082	An error occurs when posting an item journal line, stating that the line does not have item tracking, even though item tracking is assigned. This issue occurs when the <b>Lot No. Profile</b> page associated with the item is configured with an element for expiration date, and the expiration date is manually selected while assigning a lot on the <b>Item Tracking Lines</b> page.



# 2408.7.0.0

Release Note • 1/29/2025 • 1 min read

## Resolved issues

The following issues have been resolved in this release.

ID	Description
245612	The system fails to update the value in the <b>Expiration Date</b> field in the created Item Tracking lines when using the <b>Assign Lot No.</b> action from the <b>Functions</b> menu.
258182	The system incorrectly assigns the work date instead of the expiration date to the <b>Lot No.</b> field on the <b>Purchase Order</b> page, when the <b>Lot No. Profile</b> field value is set to an expiration date.



# 2408.6.0.0

Release Note • 1/27/2025 • 1 min read

## Enhancements/Modifications

With this release of the Apteon Lot Management extension, it is mandatory to install the Apteon [Standard Measurements](#) extension to ensure compatibility and seamless operation for businesses using the Apteon Lot Management extension.



# 2408.5.0.0

Release Note • 1/23/2025 • 1 min read

## Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Apteian Standard Measurements extension. To know more, see [Highlights of Standard Measurements, version 2501.0.0.0](#).



# 2408.4.0.0

Release Note • 1/7/2025 • 1 min read

## Resolved issues

The following issue has been resolved in this release.

ID	Description
250285	The system incorrectly updates the <b>Item Tracking</b> field value on the <b>Warehouse Receipt</b> page when the associated item is item tracked, and the receipt is generated from the <b>Route Planning Worksheet</b> page.



# 2408.3.0.0

Release Note • 12/27/2024 • 1 min read

## Resolved issues

The following issue has been resolved in this release.

ID	Description
247474	The system incorrectly updates the <b>Item Tracking</b> field value on the <b>Production Journal</b> page for the consumption item when the associated line contains a negative quantity value.



# 2408.2.0.0

Release Note • 12/17/2024 • 1 min read

## Resolved issues

The following issue has been resolved in this release.

ID	Description
239573	<p>The system displays blank values in the following fields on the <b>Warehouse Reclassification Journals</b> page after executing the <b>Item Tracking Lines</b> action and then returning to the page.</p> <ul style="list-style-type: none"><li>• From Zone Code</li><li>• From Bin Code</li><li>• To Zone Code</li><li>• To Bin Code</li><li>• Quantity</li></ul>



# 2408.1.0.0

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](#).



# 2408.0.0.0

Release Note • 12/5/2024 • 1 min read

## Enhancements/Modifications

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



# 2407.0.0.0

Release Note • 11/26/2024 • 1 min read

## Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean Quick Production extension. To know more, see [What's new in Quick Production, version 2403.0.0.0](#)



# 2406.6.0.0

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

## Enhancements/Modifications

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



# 2406.5.0.0

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

## Resolved issues

The following issue has been resolved in this release.

ID	Description
236550	The system incorrectly assigns a lot for the production order routing lines on the <b>Output Journals</b> page when executing the <b>Assign Lot No.</b> action, even though the line has already been assigned a lot. This issue occurs when the production order routing lines are fetched upon executing the <b>Explode Routing</b> or <b>Explode Routing - Multi</b> action.



# 2406.4.0.0

Release Note • 10/17/2024 • 1 min read

## Enhancements/Modifications

With this release of the Aptean Lot Management extension, new parameters and variables have been added to the *LotNoProfileMgtFDW* codeunit, providing more flexibility for customizations related to lot number processing and validation error handling.



# 2406.3.0.0

Release Note • 10/17/2024 • 1 min read

## Resolved issues

The following issue has been resolved in this release.

ID	Description
229844	A performance issue occurs when processing multiple documents with item tracking information, resulting in slower page load times due to unnecessary queuing of item ledger entries.



# 2406.2.0.0

Release Note • 9/19/2024 • 1 min read

## Enhancements/Modifications

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



# 2406.1.0.0

Release Note • 9/18/2024 • 1 min read

## Enhancements/Modifications

With this release of the Aptean Lot Management extension, the **Item Withdrawal Segments** dialog label associated with the **Item Tracing** page has been updated to remove erroneous spelling and enhance readability. This enhancement addresses the issue reported in bug ID #229782.

## Resolved issues

The following issue has been resolved in this release.

ID	Description
229782	The system displays an incorrect spelling of <i>withdrawal</i> on the <b>Item Withdrawal Segments</b> dialog label.



# 2406.0.0.0

Release Note • 9/4/2024 • 1 min read

## Enhancements/Modifications

With this release of the Apteon Lot Management extension, the system generates lot numbers based on predefined profiles, including details like dates and vendor information. The system automatically assigns lot numbers through the WMS scanner or based on a lot number series, if specified. To know more, see [What's new in Apteon Warehouse Management System, version 2402.0.0.0](#).

## Integrations

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



# 2405.2.0.0

Release Note • 8/29/2024 • 1 min read

## Enhancements/Modifications

Modifications have been made to this extension to accommodate the changes made in the Apteon Expiration Management extension. For more information, see [What's new in version 2402.8.0.0](#).



# 2405.1.0.0

Release Note • 8/27/2024 • 1 min read

## Enhancements/Modifications

With this release of the Aptean Lot Management extension, the process has been enhanced to manage the *User Group* and *User Group Permission Set* tables. This ensures compatibility with both current and future versions of Business Central, even when these tables are deprecated.

### Note

The *User Group* and *User Group Permission Set* tables are deprecated in Business Central, version 25.



# 2405.0.0.0

Release Note • 8/20/2024 • 1 min read

## Enhancements/Modifications

This extension has been updated to ensure interoperability with the Aptean Shop Floor Production extension. To know more, see [What's new in version 2404.0.0.0](#).



# 2404.4.0.0

Release Note • 7/17/2024 • 1 min read

## Resolved issues

The following issue has been resolved in this release.

ID	Description
220662	An error occurs when registering the output for a lot-tracked item if the Apteon Lot Management extension is not installed, causing the system to fail to generate the lot number.



# 2404.3.0.0

Release Note • 7/5/2024 • 1 min read

## Resolved issues

The following issue has been resolved in this release.

ID	Description
217040	The system gives a warning message when the obsolete item tracking status functions are used which are replaced by new internal functions.



# 2404.2.0.0

Release Note • 7/3/2024 • 1 min read

## Enhancements/Modifications

This extension has been enhanced to ensure seamless integration with the Aptean Global Trade extension when the **Automatically Assign Lot No. on Purchase Order** field is set to *On Release* on the **Lot Management Setup** page. For more information, see [What's new in version 2401.1.0.0](#).



# 2404.1.0.0

Release Note • 6/27/2024 • 1 min read

## Enhancements/Modifications

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



# 2404.0.0.0

Release Note • 6/12/2024 • 1 min read

## Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Apteau [Expiration Management](#) extension.



# 2403.1.0.0

Release Note • 5/27/2024 • 1 min read

## Resolved issues

The following issues have been resolved in this release:

ID	Description
204137	The system generates the lot number incorrectly on the <b>Item Tracking Lines</b> page when the <b>Work Date</b> value on the <b>My Settings</b> page has a single-digit day value.
205233	The system fails to update the <b>Item Tracking</b> and <b>Assigned Lot</b> field values correctly on the <b>Warehouse Receipt</b> page, when a warehouse receipt is created from a transfer order.



# 2403.0.0.0

Release Note • 5/14/2024 • 1 min read

## Enhancements/Modifications

This extension has been updated to ensure interoperability with the features added in the Apteian Drop Shipment extension. To know more, see [Highlights of version 2401.0.0.0](#).



# 2402.4.0.0

Release Note • 4/30/2024 • 1 min read

## Resolved issues

The following issue has been resolved in this release:

ID	Description
189019	The <b>Grower Vendor Link List</b> page displays the vendor number from a deleted grower record in the <b>Main Vendor</b> field when the deleted grower <b>No.</b> is used again on the <b>Grower</b> page.



# 2402.3.0.0

Release Note • 4/24/2024 • 1 min read

## Resolved issues

The following issue has been resolved in this release:

ID	Description
170062	Performance issues occur during lot assignment when the order contains multiple lines assigned with multiple lots.



# 2402.2.0.0

Release Note • 3/19/2024 • 1 min read

## Enhancements/Modifications

Modifications were made for this extension to accommodate the changes in the Aptean [Shop Floor Production](#) extension. To know more, see What's new in version [2401.6.0.0](#).



# 2402.1.0.0

Release Note • 3/7/2024 • 1 min read

## Enhancements/Modifications

With this release of the Aptean Lot Management extension, the issues arising from the indirect permission set have been effectively resolved to ensure the seamless functionality of the extension.

## Resolved issues

The following issue has been resolved in this release:

ID	Description
180620	An error occurs while executing the fundamental Business Central functionalities when BASIC permission sets exist for the user.



# 2402.0.0.0

Release Note • 3/6/2024 • 1 min read

## Enhancements/Modifications

Modifications were made for this extension to accommodate the changes in the Aptean Fresh Bridge extension. To know more, see [What's new in version 2402.0.0.0](#).



# 2401.4.0.0

Release Note • 2/26/2024 • 1 min read

## Enhancements/Modifications

With this release of the Aptean Lot Management extension, you can navigate to the **Power BI Embedded Report Part** page from the **Power BI Reports** FactBox on the **Lot No. Information Card** page. This is compatible with the BC 24 version.



# 2401.3.0.0

Release Note • 1/17/2024 • 1 min read

## Enhancements/Modifications

Modifications were made to the **Lot Management Setup** page to enhance the efficiency and performance. For more information, see [Lot management setup](#).

## UI/UX changes

The **Disable Item Tracking Info** toggle is added to the **General** FastTab of the **Lot Management Setup** page.

## Resolved issues

The following issue has been resolved in this release:

ID	Description
169118	The <b>Item Tracking</b> and <b>Assigned Lot(s)</b> fields on the <b>Lines</b> FastTab cause performance issues while displaying certain pages.



# 2401.2.0.0

Release Note • 1/12/2024 • 1 min read

## Enhancements/Modifications

Modifications were made for this extension to accommodate the changes in the Aptean [Shop Floor Production](#) extension. To know more, see [Release Notes](#) of versions 2401.1.0.0 and 3.4.137900.0.



# 2401.1.0.0

Release Note • 1/10/2024 • 1 min read

## Enhancements/Modifications

Modifications were made for this extension to accommodate **Lot No.** assignment on the **Output Journal** page based on the **Element** and **Value** configured on the **Lot No. Profile** page.



# 2401.0.0.0

Release Note • 1/10/2024 • 1 min read

## Features

With the features added in this release of the Apteon Lot Management extension, you can

- Assign lot number to the production order in the planned or firm planned state. For more information, see [Create Lot Number](#).
- Use lot production date while assigning lot to released production orders using Lot No. Profile. For more information, see [Lot No. Profiles](#).

These functions work only if the Apteon [Expiration Management](#) extension is installed.

## UI/UX changes

The **Lot No. to Use** and **Lot Production Date** fields are added to the **Planned Production Order** and **Firm Planned Prod. Order** pages.



# 2301.6.0.0

Release Note • 12/4/2023 • 1 min read

## Enhancements/Modifications

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



# 2301.5.0.0

Release Note • 11/29/2023 • 1 min read

## Resolved issues

The following issue has been resolved in this release:

ID	Description
156309	When creating a purchase order via the <b>Subcontracting Worksheets</b> page, the system assigns a lot number to the purchase order resulting in an error.



# 2301.4.0.0

Release Note • 11/1/2023 • 1 min read

## Enhancements/Modifications

With this release of the Aptean Lot Management extension, you can set the vendor production date and vendor lot number on the item tracking lines. For more information, see [Create Lot Number](#).

## UI/UX changes

The **Vendor Production Date** and **Vendor Lot No.** fields are added to the **Item Tracking Lines** page and **Inventory Put-away** document.



# 2301.3.0.0

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

## Resolved issues

The following issues have been resolved in this release:

ID	Description
152182	The space in the <i>Fixed value</i> on the <b>Lot. No Profile</b> page is ignored when inheriting the <b>Lot No.</b> field value on the <b>Item Tracking Lines</b> page.
151971	An error occurs on the <b>Purchase Order</b> page when an <b>Alternate Vendor Address Code</b> is selected for an item with no <b>Item Tracking Code</b> . This issue also occurs when the <b>Country/Region</b> is changed.



# 2301.2.0.0

Release Note • 10/3/2023 • 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.



# 2301.1.0.0

Release Note • 9/28/2023 • 1 min read

## Resolved issues

The following issue has been resolved in this release:

ID	Description
148658	An error occurs while reclassifying an item with lot origin details in the item reclassification journal.



# 1.25.109455.0

Release Note • 7/26/2023 • 1 min read

## Enhancements/Modifications

Modifications were made for this extension to accommodate the changes in the Aptean [Reporting](#) extension. To know more, see [What's new in version 1.12.109504.0](#).



# 1.24.103469.0

Release Note • 6/13/2023 • 2 min read

## Features

With this release of the Aptean Lot Management extension, you can:

- Assign a lot based on the routing lines in the production order using Lot No. Profile. For more information, see [Lot No. Profiles](#).
- Suggest a variable that helps you to name the lot that will be assigned on the **Released Production Order** page. For more information, see [Create Lot No. with Lot No. Profile](#).
- Use lot production date while assigning lot to released production orders using Lot No. Profile. This function works only if the Aptean Expiration Management extension is installed. For more information, see [Lot No. Profiles](#).

## UI/UX Changes

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

- A new *Prod. Order Line Lot No.* option is added in the **Element** field on the **Lot No. Profile** card page.
- A new **Lot No. to Use** and **Lot Production Date** field is added on the relevant **Released Production Order** page.
- A new *Production Date* option is added in the **Use Date** field for the following elements on the **Lot No. Profile** card page:
  - Year Number Long
  - Year Number Short
  - Month Number
  - Week Number
  - Week day Number
  - Day Number
  - Year Code
  - Month Code
  - Week Code
  - Week Day Code
  - Day Code
  - Julian Date
  - Julian Day



For more information, see [Lot No. Profiles](#).



# 1.23.102733.0

Release Note • 6/8/2023 • 1 min read

## Enhancements/Modifications

Modifications were made for this extension to accommodate the changes in the [Advanced Lot Attributes](#) extension. The main objective of the Advanced Lot Attributes extension is to manage a specific set of business rules implemented over the lot attributes functionality provided by the [Aptean Advanced Attributes](#) extension. These business rules apply explicitly to trading and manufacturing companies in the fresh produce industry. In addition, the extension has several extra features made specifically for use in the fresh industry.



# 1.22.101533.0

Release Note • 4/3/2023 • 1 min read

## Enhancements/Modifications

Modifications were made for this extension to accommodate the changes in the Aptean [Mobile Warehouse Registration](#) extension. To know more, [What's new in version 1.21.102188.0](#).



# 1.21.96092.0

Release Note • 5/8/2023 • 1 min read

## Enhancements/Modifications

Modifications were made for this extension to accommodate the changes in the Aptean [Producer Certification](#) extension. To know more, see [Highlights of version 1.0.96375.0](#).



# 1.21.95651.0

Release Note • 5/8/2023 • 1 min read

## Enhancements/Modifications

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



# 1.20.93908.0

Release Note • 5/8/2023 • 1 min read

## Resolved Issues

The issues addressed in this release are listed in the following table:

ID	Description
100874	On the <b>Physical Inventory Journals</b> page, the <b>Item Tracking</b> field populates the term <i>Incomplete</i> even though the values in the <b>Qty. (Calculated)</b> and <b>Qty. (Phys. Inventory)</b> fields are equal.
110544	On the <b>Purchase Return Order, Sales Return Order, Output Journals, and Item Reclassification</b> page, on the <b>Lines</b> FastTab, while assigning lot number values through the <b>Assigned Lot(s)</b> field, the values for an item line in the <b>Location Code, Quantity, and Item Tracking</b> fields get deleted.
113567	On the <b>Purchase Return Order, Sales Return Order, Item Journals, Sales Order, and Proof Order</b> page, on the <b>Lines</b> FastTab, while selecting the multiple lot numbers through the <b>Item Tracking</b> field for an item and clicking the <i>Multiple Lots</i> in the <b>Assigned (Lots)</b> field, an error occurs.



# 1.19.90562.0

Release Note • 5/8/2023 • 1 min read

## Resolved Issues

The issues addressed in this release are listed in the following table:

ID	Description
94881	On the <b>Purchase Order</b> page, the existing <b>Item Tracking</b> line must be deleted before modifying or deleting the purchase lines.
98330	On the <b>Consumption Journals</b> page, an error occurs while selecting an existing Lot No. for the released Production Order.
106338	On the <b>Warehouse Receipt</b> page that is created from Sales Return Order, the <b>Item Tracking</b> and <b>Assigned Lot(s)</b> fields are not being updated.
106405	On the <b>Output Journal</b> page for a Released Production Order, the <b>Create License Plate</b> field is not active for the License Plate tracked items.



# 1.18.88700.0

Release Note • 4/3/2023 • 1 min read

## Resolved issues

The following issue has been resolved in this release:

ID	Description
94305	In the Production process, when you tap the <b>Register output</b> button for the first time on Power Apps, an error occurs on the <b>Output</b> page. However, the output gets posted on the <b>Released Production Order</b> page in Business Central. The error states, <i>You cannot assign new numbers from the number series</i> even though the <b>Manual Nos.</b> checkbox is selected. This is done to accommodate the changes made in the Aptean <a href="#">Shop Floor Production</a> extension. To know more, see <a href="#">What's new in version 1.6.88684.0</a> .



# 1.17.83570.0

Release Note • 4/3/2023 • 1 min read

## Resolved Issues

The following issue has been resolved in this release:

ID	Description
94891	An error message appears when selecting the existing lot number values in the component line for the Released Production Order.



# 1.16.79903.0

Release Note • 4/3/2023 • 1 min read

## Features

With this release of the Aptean Lot Management extension, you can access the **Information > Lot No. Information List** navigation menu from the Role Center page for the following roles:

- Business Manager
- Shipping and Receiving - Warehouse Management System
- Sales Order Processor
- Manufacturing Manager

## Resolved Issues

The following issues are resolved in this release:

ID	Description
93596	When the quantity in the item tracking lines is changed after the lot is assigned/selected, the <b>Item Tracking</b> field on the <b>Production Journal</b> , <b>Consumption Journal</b> , and <b>Output Journal</b> pages is updated to <i>Incomplete</i> on validating the consumption or output quantity.
91472	On the <b>Prod. Order Components</b> page, the <b>Item Tracking</b> field for the component line displays <i>Complete</i> even though the lot number is not assigned on the item tracking lines.
86794	The default sales variant code is being repopulated even after it has been removed from the <b>Variant Code</b> field when the item tracking code is assigned to the sales order line.
89927	When assigning lot number using Lot No. Profile, a zero is additionally added as a character to the day number in the lot number.



# 1.15.74860.0

Release Note • 4/3/2023 • 1 min read

## Enhancements/Modifications

Modifications were made for this extension to accommodate the changes in the Aptean [Catch Weight](#) extension. To know more, see [What's new in version 2.0.75084.0](#).



# 1.14.73202.0

Release Note • 4/3/2023 • 1 min read

## Resolved Issues

The following issues have been resolved in this release:

ID	Description
86492	An error occurs while posting the item journals if it is assigned with the item tracking that has both serial number and lot number.
85603	When a different <b>UoM</b> is assigned to the <b>Production Order</b> , the <b>Lot No.</b> is not updated on the <b>Production Journal</b> page.



# 1.13.70155.0

Release Note • 4/3/2023 • 1 min read

## Features

With the features added in this release of the Aptean Lot Management extension, you can:

- Assign a lot number to the routing lines of multiple production orders using the new **Assign Lot No.** action on the **Output Journals** page. For more information, see [Output Journals](#).
- Delete the assigned item tracking code for the routing lines of multiple production orders using the new **Delete Item Tracking** action on the **Output Journals** page. For more information, see [Output Journals](#).
- Assign the lot number series to the item tracking code with the new **Lot No. Profile** field on the **Item Template** and **Item Tracking Lines** page.
- View the value in the **Lot No. Profile** field on the **Item Tracking Lines** page of the sales order, purchase order, production order, and item journal.
- Edit the **Lot No. Profile** field only when,
  - The **Lot Specific Tracking** toggle is enabled on the relevant **Item Tracking Code Card** page.
  - The **Lot Nos.** field has no value on the **Item Card** page.



# 1.12.69181.0

Release Note • 4/3/2023 • 1 min read

## Resolved Issues

The following issues have been resolved in this release:

ID	Description
81588	An error occurs while accessing the item tracking lines via the "Incomplete" text on the <b>Item Tracking</b> field if a second item tracking line exists on a purchase receipt and the item is a lot and license plate tracked.
70075	The <b>Quantity</b> and <b>Location Code</b> values disappear automatically when clicking the <b>Item Tracking</b> field on the <b>Item Journals</b> Page.



# 1.11.65632.0

Release Note • 5/15/2023 • 1 min read

## Resolved Issues

The following issue has been resolved in this release:

ID	Description
79186	While executing the <b>New Lot No. (F5)</b> function from the Context Menu on the Production page in the Mobile Device, the Lot Number is generated based on the Current Work Date from the Lot Profile instead of the Starting Date and Ending Date. The Starting Date-Time and Ending Date-Time are not populated correctly on the Released Production Order line.



# 1.11.65404.0

Release Note • 5/8/2023 • 1 min read

## Resolved Issues

The following issues have been addressed in this release:

ID	Description
68456	On a <b>Purchase Order</b> , when you close the <b>Item tracking Lines</b> page, the <b>Quantity</b> field disappears and the <b>Item Tracking</b> field changes to <i>Incomplete</i> .
69839	On the <b>Item Journals</b> page, the values in the <b>Location Code</b> , <b>Quantity</b> , and <b>Bin code</b> fields disappear when you choose <b>Incomplete</b> in the <b>Item Tracking</b> field.
68455	On the <b>Transfer Order</b> page, when you create a warehouse shipment after releasing the transfer order, the <b>Item Tracking</b> field and <b>Assigned Lot(s)</b> field in the warehouse shipment lines display incorrect values.
68979	On a <b>Purchase Order</b> , the value in the <b>Location Code</b> and <b>Quantity</b> fields in the purchase order lines disappears when you select <i>Incomplete</i> in the <b>Item Tracking</b> field and close the <b>Item Tracking Lines</b> page.
70141	An error occurs when you assign multiple lot numbers on a <b>Purchase Order</b> and close the <b>Item Tracking Lines</b> page.
68454	The value in the <b>Quantity</b> field disappear when you assign lot numbers on a <b>Purchase Order</b> and <b>Transfer Order</b> .



# 1.10.57810.0

Release Note • 4/3/2023 • 1 min read

## Enhancements/Modifications

Minor technical changes were made to facilitate seamless integration between the Aptean Lot Management extension and the Aptean [Mobile Warehouse Registration](#) extension.



# 1.9.56209.0

Release Note • 4/3/2023 • 1 min read

## Enhancements/Modifications

Minor technical changes were made for this extension to facilitate seamless integration between the following extensions:

- The Apteau [Integration Layer](#) extension.
- The Apteau Foundation Layer extension, where you can add the table values for the dependencies extension on the standard tables.



# 1.9.55815.0

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.



# 1.8.55203.0

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.



# 1.8.53971.0

Release Note • 4/3/2023 • 2 min read

## Features

The new features in this release are listed below:

- You can now get an overview of all the lot numbers linked to a specific vendor lot number using the **Filter by Vendor Lot no.** function on the **Lot No. Information List** page. For more details, see [here](#).
- You can now **Clear Vendor Lot No. filter** using the function on **Lot No. Information List** page.
- You can now use the **Trace** functions on the **Item Tracing** page for all Lot Numbers linked to a specific **Vendor Lot Number**. For more details, see [here](#).
- You now quickly see more details of the lot number of the selected line on the **Lot Details** fact box on the **Item Tracing, Item Tracking, Inventory Pick and Inventory Put-away** pages. For more details, see [here](#).
- The word template linked with the segment is printed or emailed when the segment is logged. The relevant word template will be printed or emailed based on the code and type you select in the **Interaction Template Code** and **Correspondence Type** fields on the **Segment** page.
- The following fields are newly added on the **Interaction Log Entries** page:
  - **Item Ledger Entry No.**
  - **Location Code**
  - **Item No.**
  - **Lot No.**
  - **Source No.**
  - **Source Document No.**
  - **Contact Phone No.**
  - **Contact Email**The details in these fields will flow from the respective fields on the Segment line when the segment is logged.
- A new **Print Word Template** action is added on the **Segment** page under the **Actions > Print** menu. You can use this action to print the word template linked with the segment. To print a word template, you must enter the code in the **Word Template Code** field.
- A new **Print Word Template** action is added on the **Interaction Log Entries** page under the **Actions** menu. You can use this action to print the word template linked with the logged segment.



## Enhancements / Modifications

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



# 1.8.47554.0

Release Note • 5/8/2023 • 1 min read

## Resolved Issues

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



# 1.8.47315.0

Release Note • 4/3/2023 • 1 min read

## Features

Automatic creation or update of the lot number can be performed when the orders are large in number or change frequently. The lot numbering process can be defined as *No Creation*, *Always*, *On Release* or *Per Assigned Lot(s) Field* during Lot Management Setup to automatically assign lot numbers on the Purchase Order. For more information, see [Automatic Lot Numbering](#).

You can create interaction to record the affected customer(s)/Item(s)/Lot(s) in order to notify them of an impending item withdrawal. The **Item Ledger Entry No.**, **Location Code**, **Item No.**, **Lot No.**, **Source No.**, and **Document No.** can be viewed in the segment lines table. For more information, see [Interaction Support for Item Tracing Exercise](#).

You can select the Customer, Shipment, Item Ledger Entry, Item, Lot No. Information, and Location tables along with the standard tables in the **Related Entities** page while creating **Word Templates**. For more information, see [Word Template Support](#).



# 1.7.43604.0

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.

## Resolved Issues

The following issues have been resolved in this release:

ID	Description
37534	Manually created lot numbers are not visible when using the lookup in Assigned Lot(s) on the Purchase Order.
35886	Country of Origin is not inherited when creating Sublot.
35809	The item tracking line is changed to <i>incomplete</i> when multiple lot numbers are used.



# Introduction

Article • 4/3/2023 • 3 min read

The Aptean Lot Management (LMT) extension makes it possible to generate self-built lot numbers via lot number profiles and easily look up a lot number and its associated information on the **Lot No. Information** list.

With lot number profiles it is possible to create a lot number with different elements, such as a date, a vendor element or a document number. By means of a conversion table, it is possible to convert a date to a specific code which can also be used as an element in a lot number.

If a maximum number of characters for a lot number should be allowed, for example, because of working with other external systems, this can be set up.

When opening the **Lot No. Information** list, the page shows detailed information regarding the lot such as item no., variant code, description, quantity in inventory and base unit of measure.

It is possible to use multiple filters on the **Lot No. Information** list to create cross-sectional data or to slice data. After opening the **Lot No. Information** card, several functions can be used. For example, the expiration date or the inspection status can be changed (if the extensions [Expiration Management](#) and [Inspection Status](#) are installed). This is possible both on a desktop and on a tablet.

The factbox that shows the lot location/bin content is visible on the desktop on the **Lot No. Information** list as well as on the **Lot No. Information** card. When using a tablet, the factbox is only visible on the **Lot No. Information** card.

The **Lot Origin Details** provide extra information about the lot number, such as the country of origin where the item has been manufactured, produced, or where an item originally comes from. Other details can be added as well, such as the vendor lot number, production date, grower and certificate number. The **Country of Origin** of a lot number can be assigned manually to the lot number information card, but it is also automatically populated when a receipt is being posted, and when output for a production or assembly order is created.

Insight is given into the item tracking of an item that is lot-tracked in a document without the need to open the **Item Tracking** page. For this purpose, two fields are added various documents throughout Microsoft Dynamics 365 Business Central. The first field, called **Item Tracking**, shows if item tracking is needed for the item entered on the document line, or if the total quantity is (not yet) entered in the item tracking for the document line. When clicking on the field, it will in all cases open the Item Tracking page. The second field, called **Assigned Lot(s)**, shows the lot number if one lot number has been assigned for the document line in the item tracking.



# Setup

Article • 12/27/2024 • 1 min read

The following setups are required.

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



# Manage permission sets

Article • 12/27/2024 • 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 *LOTMANAGEMENTFDW*.

## Indirect permission sets

Users with this permission set can perform specific actions. This is used in conjunction with other permission sets to allow you to perform certain actions. These permissions typically involve additional conditions or approvals before the action can be completed.


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

## 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 Aptean Lot Management extension, ensuring secure and role-based access.




# Set up lot management

Article • 3/25/2026 • 2 min read

You can configure the following setups:



1. Select the Search icon , enter **Lot Management Setup** and then choose the related link. The **Lot Management Setup** page opens.
2. On the **General** FastTab, enter the required information in the following fields:

Field	Description
Max. Length Lot No.	Enter the maximum number of characters allowed for a lot number. For example, <code>_20_</code> .
Disable Item Tracking Info.	<p>Turn on the toggle to hide the visibility of the <b>Item Tracking</b> and <b>Assigned Lot(s)</b> fields on the <b>Lines</b> FastTab of the following pages:</p> <ul style="list-style-type: none"> <li>• Assembly Order</li> <li>• Consumption Journal</li> <li>• Finished Production Order</li> <li>• Firm Planned Production Order</li> <li>• Internal Movement</li> <li>• Item Journal</li> <li>• Item Reclassification Journal</li> <li>• Output Journal</li> <li>• Physical Inventory Journal</li> <li>• Planned Production Order</li> <li>• Production Order Components</li> <li>• Production Journal</li> <li>• Purchase Order</li> <li>• Purchase Return Order</li> <li>• Released Production Order</li> <li>• Sales Order</li> <li>• Sales Return Order</li> <li>• Simulated Production Order</li> </ul>



	<ul style="list-style-type: none"> <li>• Transfer Order</li> <li>• Warehouse Item Journal</li> <li>• Warehouse Receipt</li> <li>• Warehouse Reclassification Journal</li> <li>• Warehouse Shipment</li> </ul>
Permit Lot Selection For Positive Adjustments	Turn on the toggle to select a lot number for positive adjustments.
Copy Production Lot Details to Lot Origin Details	Turn on the toggle if you want the system to copy lot details from production journals to lot origin details upon posting. For more information, see <a href="#">View lot origin details</a> .
View Traceability Source Reference	Turn on the toggle to view the <b>Traceability Source Reference</b> field on the <b>Item Tracking Lines</b> page for output journals, purchase orders, purchase invoices, and production orders. For more information, see <a href="#">Manage item tracking enhancements</a> .

3. In the **Lot Increment Per** field, select one of the following options:

- *Document Line* - Suffixes are unique per line. Each document line maintains its own incremental suffix sequence.
- *Document* - Suffixes are unique across all lines in the document. The incremental suffix number is shared across all lines within the same document.

4. On the **Number Series** FastTab, enter the required information in the following fields:

Field	Description
Grower Nos.	Select the number series code the system must use to automatically assign in the <b>No.</b> field on the <b>Grower</b> page when creating a grower. Alternatively, you can manually enter the grower number if required.
Recall Nos.	Select the number series code the system must use to automatically assign in the <b>No.</b> field on the <b>Recall</b> card page when creating a recall. Alternatively, you manually enter the recall number if required. For more information, see <a href="#">Create recalls</a> .

5. On the **Automatic Lots** FastTab, in the **Automatically Assign Lot No. on Purchase Order** field, select the scenario where the lot number should be assigned automatically for the lot tracked items on purchase orders. The available options are:



## Lot Management

- No Creation
- Always
- On Release
- Per Assigned Lot(s) Field

The lot management setup is complete.




# Set up growers

Article • 5/26/2025 • 2 min read

The information of a grower can be registered in the system, such as the name, certificate number, and address information about the person or company who grows a particular type of crop.

The grower can be assigned as extra information to the lot number. When selecting the grower, it will inherit the certificate number and the country/region code as country of origin.



1. Select the Search icon , enter **Growers**, and then choose the related link.  
The **Growers** list page opens.
2. On the action bar, click **New** to create a new entry on the **Grower** card page.
3. Enter the **Name** of the grower.
4. Enter **Certificate Number**.
5. On the **Address** FastTab, enter the **Address** of the grower.
6. Enter **Address 2**.
7. Click the lookup button in the **Country/Region Code** field.
8. Select and click the required code to choose the country/region of the grower.
9. Click the lookup button in the **City** field.
10. Select and click the required row to choose the city.
11. Click **OK**.  
The grower is now set up completely.




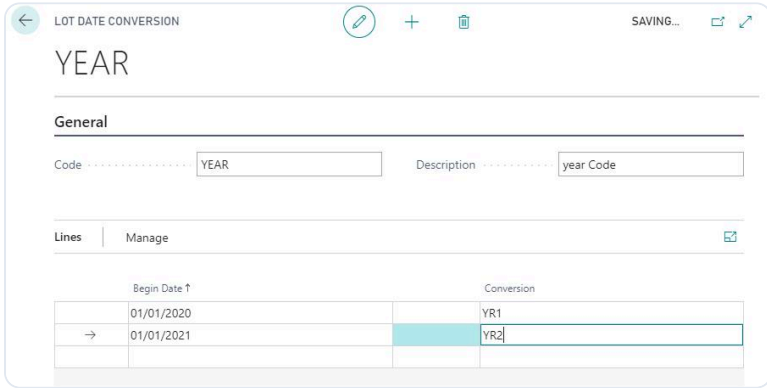
# Set up lot date conversions

Article • 5/26/2025 • 4 min read

A part of a lot number is sometimes based on a converted date. On the Lot Date Conversion page, it is possible to create codes that can be used in a lot number profile to convert a date. For example, the actual date value can be converted to a specific value, such as January (01) converted to an A and February (02) converted to a B.



1. Select the Search icon , enter **Lot Date Conversions** and then choose the related link.  
The **Lot Date Conversions** list page opens.
2. On the action bar, click **New** to create a new entry on the **Lot Date Conversion** card page.
3. Click the **Code** field and enter **Code** of the lot date conversion.
4. Click the **Description** field and enter **Description**.
5. Click the **Begin Date** field to open the calendar and select the starting date.  
This date specifies the starting date of the dates for which the conversion value on the line should be shown in a lot number (instead of the actual date value).
6. Enter **Conversion**. This is the value that should be shown in the lot number (instead of the actual date value).  
Instead of a year code, it is also possible to create a month, week, weekday or day code. You can enter a maximum of 3 characters.



A lot date conversion for a year is now set up.



# Manage lot number profiles

Article • 3/25/2026 • 1 min read

You can manage lot number profiles as follows:

To	See
Set up lot number profiles	<a href="#">Set up lot number profiles</a>
Configure lot number generation based on the expected receipt date	<a href="#">Lot number generation based on expected receipt date configuration.</a>
Use lot elements	<a href="#">Use lot elements</a>

Task	Description
Set up incremental suffix elements	Configure lot number profiles to include an incremental suffix or document line number as an element.




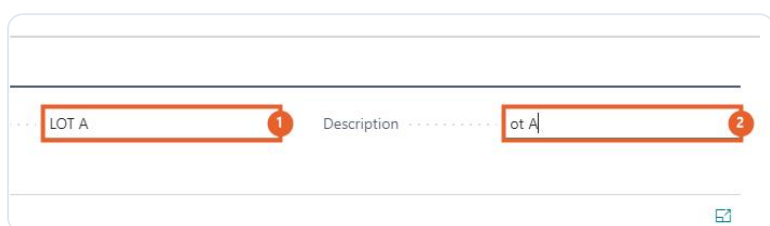
# Set up lot number profiles

Article • 3/25/2026 • 13 min read

On the **Lot No. Profile Setup** page the different elements that are used to generate lot numbers are set up. The order of the lines in the lot number profile determines the order of the values in the lot number.



1. Select the Search icon , enter **Lot No. Profiles** and then choose the related link.
2. On the **Lot No. Profiles** list, on the action bar, click **New** to create a new entry on the **Lot No. Profile** page.
3. Enter **Code**.
4. Enter **Description**.

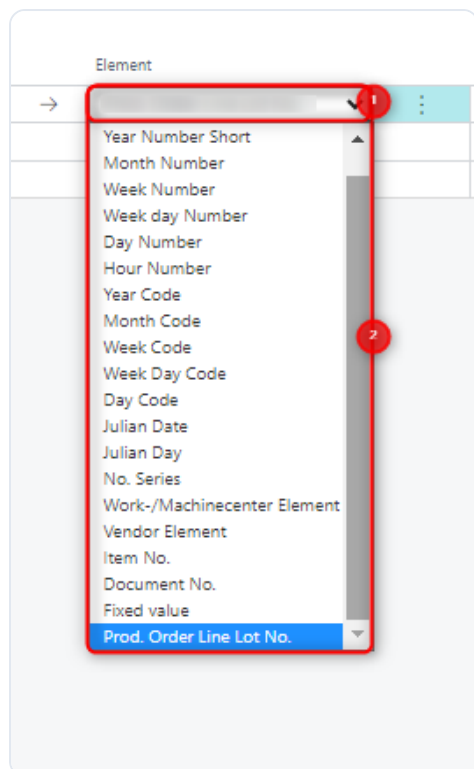


A lot number can consist of different types of elements, which require different settings. In the description below, the different elements are shown with their setting.

## Set up date elements

1. On the **Lot No. Profile** page, on the **Lines** FastTab, click the **Element** field.
2. Select the required option from the dropdown menu.





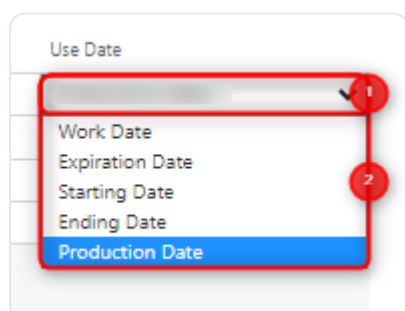
3. Select one of the following options from the list:

- Year Number Long
- Year number Short
- Month Number
- Week Number
- Week Day Number
- Day Number
- Hour Number

When selecting one of the above date element types, the **Use Date** field is mandatory. The **Use Date** field specifies the date that is used for generating the value for the selected element.

4. In the **Use Date** field, select a value from the dropdown.

For the element **Hour Number**, the actual hour of the moment creating the lot number is taken, so it is not possible to enter a use date.



- **Work Date:** This is the work date that is set up in **My settings** at the moment the lot number is created.
- **Expiration Date:** The expiration date is based on the expiration date entered in the item tracking line. If this field is empty and the toggle **Require Expiration Date** is turned off in the item tracking code, the expiration date will be based on the **Expiration Calculation** field on the item card. If this field is empty or the **Require Expiration Date** toggle is turned on, the **Expiration Date** field on the item tracking line needs to be filled manually before assigning a lot number.
- **Starting Date:** The starting date is used from the production order from which the lot number is created. This date can be used together with the ending date if a production order consists of several steps. For example, if the production order exists of a production and packaging step, in most cases the production date will be similar to the starting date and the packaging date will be similar to the ending date. If no starting date is available, because the lot number is created from another document than a production order, then the work date is used here.
- **Ending Date:** The ending date is used from the production order from which the lot number is created. If no ending date is available, the work date is used here.
- **Production Date:** The production date is considered based on the date that is entered in the **Lot Production Date** field on the relevant **Production Order** page. This **Production Date** option is displayed only for the *Year Number Long, Year Number Short, Month Number, Week Number, Weekday Number, Day Number, Year Code, Month Code, Week Code, Weekday Code, Day Code, Julian Date, and Julian Day* elements.

 Note

- This **\_Production Date\_** option is displayed only if the Apteon Expiration Management extension is installed. If the Apteon Expiration Management extension is uninstalled after selecting this option, the **Use Date** field is reset to the **\_Work Date\_** option. - 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.

## Set up date conversion elements

1. Click the **Element** field and select the required option from the dropdown menu.

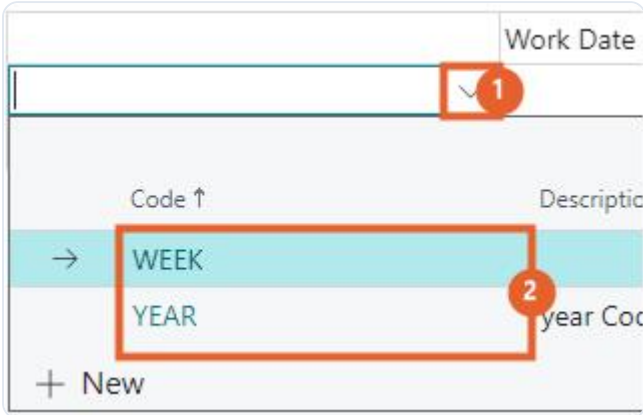
For using a code from the date conversion table, select one of the following options from the list:

- **Year Code**
- **Month Code**
- **Week Code**
- **Week Day Code**
- **Day Code**



When selecting one of the above date codes, both fields **Value** and **Use Date** are mandatory.

2. Click the lookup button in the **Value** field.
3. Select and click the required **Code**. The available date conversion codes are shown. See [Lot Date Conversion](#) for more information about setting up the date conversion codes.



4. In the **Use Date** field, select a value from the dropdown.

## Set up lot elements

One of the parts of the lot number can be lot elements for a vendor, work- or machine center. Such elements are short codes, of up to 4 characters, that specify which work/machine center or vendor is linked to the lot number. These elements can be set up on the work center, machine center or vendor card.

## Set up incremental suffix elements

On the **Lot No. Profile** page, on the **Lines** FastTab, in the **Element** field, select an option. The available options are:

- *Incremental Suffix* - An auto-incrementing number is appended as a suffix. In the **Value** field, specify the zero-padding format: 01 for two digits, 001 for three digits, or 0001 for four digits. The suffix resets based on the **Lot Increment Per** setting on the **Lot Management Setup** page.
- *Document Line No.* - The document line number is appended as a suffix.  
The system validates that the *Incremental Suffix* is the last element in the lot number profile. If this rule is violated, an error message is displayed.

Use the **MoveUp** and **MoveDown** actions to set the processing order of the elements.




 Note

- The **Incremental Suffix** element can only be used as the last element in the lot number profile.
- The **Value** field for Incremental Suffix must be one of: 01, 001, or 0001.
- When the **Assign Lot No.** action is used on the **Item Tracking Lines** page, the system re-reads the lot number profile configuration each time.
- The next available suffix number is determined by querying buffered lot numbers, tracking specification records, and reservation entries.
- The Lot No. information records are created during the posting routine, not during the assign phase.

## Set up work or machine center


In the description below, an example is given of entering an element in a work center. The work instruction for the machine center is the same.



1. Select the Search icon , enter **Work centers**, and then choose the related link.  
The **Work Centers** page opens.
2. Select the required **No.**  
The **Work Center Card** page opens.
3. Click **Show more** on the **General** FastTab.
4. Enter the **Lot No. Element**.  
The lot number element for the work center is now set up.

## Set up vendors



1. Select the Search icon , enter **Vendors** and then choose the related link.  
The **Vendors** list page opens.
2. Select and click the required **No.**  
The **Vendor Card** page opens.
3. Click **Show more** on the **General** FastTab.
4. Enter the **Lot No. Element**.  
The lot number element for the vendor is now set up.



# Lot number generation based on expected receipt date configuration

Article • 7/2/2025 • 3 min read

## Configure the setup

To enable lot number generation based on the expected receipt date, ensure the following setup is configured.

- On the **Lot No. Profile** page, the **Use Date** field value is set to the *Expected Receipt Date*.
- On the **Item Card** page, in the **Lot No. Profile** field, select a lot number profile for which the **Use Date** field value is set to *Expected Receipt Date* on the associated **Lot No. Profile** page.

## Manage lot number scenarios

- If the **Expected Receipt Date** field is configured on the **Lines** FastTab of the **Purchase Order** page and the **Assign Lot No.** action is triggered on the **Item Tracking Lines** page, the system generates the lot number based on the **Expected Receipt Date** field value, and this value is populated in the **Lot No.** field on the **Item Tracking Lines** page.

When the **Source Document** field value is set to *Purchase Order* on the **Create Inventory Put-away/Pick/Movement** and **Create Whse. Receipt** pages, the lot number is generated based on the **Expected Receipt Date** field value.

- On the **Expected Receipt Date** field is not configured on the **Lines** FastTab of the **Purchase Order** page, the system defaults to the **Work Date** field value from the **My Settings** page to generate the lot number. On the **Create Inventory Put-away/Pick/Movement** and **Create Whse. Receipt** pages, if the **Source Document** field is set to any value other than purchase order, the system will generate a lot number based on the **Work Date** field value from the **My Settings** page.

## Set up lot number element series

It is possible to add a created number series from the No. Series Table. For example, it is possible to add a number series that automatically increases (a part of) the lot number when creating it.

1. Click the **Element** field and select the **No. Series** option in the list.
2. Click the **Value** field.
3. Select and click the required number series.



YEAR	Work
lot	✓ 1
Code ↑	Description
→ IJNL-SUB	Sublot Manag
I-LOT	2 lot Numbers
WIJNL-SUB	Whse Reclass !

4. Select the **Reset No. Series** checkbox if you want the system to reset the number series to the starting number when it has reached the last number.



# Use lot elements

Article • 5/26/2025 • 3 min read

Lot elements for vendors, work centers or machine centers are short codes, of up to 4 characters, that specify which work/machine center or vendor is linked to the lot number.

1. Click the **Element** field.
2. Select one of the following options from the dropdown menu:
  - **Work-/Machine center Element**
  - **Vendor Element**
3. When creating the lot number, the element values that are set up on the corresponding Vendor, Machine and/or Work center card are copied to the lot number. See [Set up Lot Elements](#) for more information. If the element is not specified on the Vendor, Work- or Machine center card or the lot no is created when no vendor or work-/machine center is available in the source document, then a fall-back value is required. This fall-back value, of up to 4 characters, must be specified in the "**Value**" field.

## Set up fixed values

It is possible to specify a fixed value that should be part of the lot number. As an example, this fixed value can be used to split different lot elements with a punctuation mark, such as - or /.

1. Click the **Element** field.
2. Select the **Fixed value** option from the dropdown menu.
3. Click the **Value** field and enter **Value**.

YEAR	Work
I-LOT	
WMC	
-	

A lot no. profile with different lot no. element lines is now set up. The profile can now be selected on an item card, so lot numbers will be generated based on this profile. See the topic [Set up Lot No. profile for an Item](#)" for more information.



# Manage lot number creation

Article • 5/26/2025 • 1 min read

You can manage lot number profiles as follows:

To	See
Set up lot number profiles for an item	<a href="#">Set up lot number profile for an item</a>
Create lot numbers	<a href="#">Create lot numbers</a>
Manage underdelivery of lot quantity	<a href="#">Underdelivery of lot quantity</a>
Manage overdelivery of lot quantity	<a href="#">Overdelivery of lot quantity</a>




# Set up lot number profile for an item

Article • 10/22/2025 • 3 min read

It is possible to select a lot number profile on an item card, so lot numbers for this item will be generated based on that profile.



1. Select the Search icon , enter **Items** and then choose the related link.
2. On the **Items** list page, select and click the required **No.** to open the **Item Card** page.
3. On the **Item Tracking** FastTab, click the lookup button in the **Lot No. Profile** field.  
See the topic [Lot No. Profile Setup](#) for more information about creating a lot no. profile.
4. Turn on the **Require Country of Origin** toggle to inherit the **Country of Origin Name** field value on the **Allow Countries of Origin** page associated with the selected vendor when creating a purchase order.
5. In the *Code\** field, select a lot number profile that will be used when assigning lot numbers.

## Note

Lot numbers can be generated based on either a number series or on a lot no. profile, therefore it is only possible specify the field **Lot No. profile** in case the field **Lot Nos.** is empty and vice versa.

Item Tracking	
Item Tracking Code	LOTALL
Lot No. Profile	PROD-LOT
Serial Nos.	
Expiration Calculation	365D
Lot Nos.	

A lot no. profile for this item is now set up.




# Create lot numbers

Article • 3/25/2026 • 5 min read

After setting a lot no. profile for an item, when assigning a lot number, the lot number is generated based on the elements from this lot no. profile.



1. Select the Search icon , enter **Purchase Orders** and then choose the related link.
2. On the **Purchase Orders** list page, on the action bar, click **New** to create a new entry on the **Purchase Order** card page.
3. Click the lookup button in the **Vendor Name** field.
4. Select and click the required vendor name and click **OK**.
5. On the **Lines** FastTab, click the **Type** field and select the option **Item**.
6. Click the **No.** field and select an item number, e.g., "0037", for which you have previously specified a lot no profile.
7. Enter **Quantity**.

For production orders, you can suggest a variable in the **Lot No. to Use** field on the production order line. It helps you to name the lot that will be assigned. The lot is named based on the combination of the value you provide in the **Lot No. to Use** field and the relevant item number.

## Note

This suggestion is considered only when you choose the **\_Prod. Order Line Lot. No.\_** option in the **Element** field on the relevant **Lot No. Profile card** page.

## Note

\* When the lot number profile includes an **Incremental Suffix** or **Document Line No.** element, the system automatically appends the corresponding value to the generated lot number. The **Incremental Suffix** is always the last part of the lot number. The system determines the next available suffix number by checking buffered lot numbers, Tracking Specification records, and Reservation Entries. The scope of the suffix increment is controlled by the **Lot Increment Per** field on the **Lot Management Setup** page.

8. On the action bar, click **Line > Item Tracking Lines**.

The **Item Tracking Lines** page opens.

9. On the action bar, click **Process > Assign Lot No.**

The lot number based on the lot no. profile is now assigned. In this example the lot number is structured as follows:



# Lot Management

Availabl... Serial No.	Serial No.	Availabl... Lot No.	Lot No.	Quantity (Base)	Qty. to Handle (Base)	Qty. to Invoice (Base)	Appl.-from Item Entry
→ Yes	:	Yes	2005008-0037	10	10	10	0

Close

- Year Number Short = 20
- Month Number = 05
- Day Number = 008
- Fixed Value = -
- Item No. = 0037

If the item is derived from a vendor,

10. On the **Vendor Production Date** field, manually enter the date when the vendor produced the item.
11. On the **Vendor Lot No.** field, enter the lot number assigned by the vendor for the item.

When creating an inventory put-away or a warehouse receipt from a purchase order, the **Vendor Production Date** and **Vendor Lot No.** field values on the document lines are automatically filled in from the item tracking lines of the associated purchase order.

Availa... Serial No.	Serial No.	Availa... Lot No.	Lot No.	Vendor Lot No.	Vendor Production Date	Availa... License Plate No.	License Plate No.	Quant
→ Yes	:	Yes	LOT0002	VLOT0002	04/10/2023	Yes	-	

## ! Note

When you post a **Purchase Order** or an **Inventory Put-away** document, the values on the **Vendor Production Date** and **Vendor Lot No.** fields will be saved in the Lot Origin Details of its associated item.



# Underdelivery of lot quantity

Article • 5/26/2025 • 1 min read

When the **Allow % Underdelivery** field is configured on the **Item Card** page, the system allows you to receive a quantity less than the value specified in the **Quantity** field on the **Purchase Order** page. The **Qty. to Receive** field value is updated based on the configured underdelivery threshold, within the permitted underdelivery percentage.

The underdelivery is considered valid only if the **Underdelivery** checkbox is selected and the received quantity falls within the allowed range.

If the value in the **Qty. to Receive** field on the **Purchase Order** page is updated based on the threshold configured in the **Allow % Underdelivery** field on the **Warehouse** FastTab of the **Item Card** page, the **Item Tracking** field value will be updated to *Completed* on the **Purchase Order** page.



# Overdelivery of lot quantity

Article • 5/26/2025 • 1 min read

When the **Allow % Overdelivery** field is configured on the **Item Card** page, the system allows you to receive a quantity greater than the value specified in the **Quantity** field on the **Purchase Order** page. The **Qty. to Receive** field value is updated based on the configured overdelivery threshold, within the permitted overdelivery percentage. The received quantity must fall within the allowed range.

If the value in the **Qty. to Receive** field on the **Purchase Order** page is updated based on the threshold configured in the **Allow % Overdelivery** field on the **Item Card** page, the **Item Tracking** field value will be updated to *Completed* on the **Purchase Order** page.



# Manage automatic creation of lot numbers

Article • 5/26/2025 • 1 min read

To set up the automatic creation of lot numbers, see [Set up automatic creation of lot numbers](#).

To automatically create lot numbers on purchase orders, see [Manage the automatic creation of lot numbers on purchase orders](#).




# Set up automatic creation of lot numbers

Article • 8/27/2025 • 3 min read

When purchase orders are large in number, or have a lot of lines, it can be labor intensive to manually create the item tracking information. Automatic creation of the lot number is preferred in such scenario. The Aptean Food and Beverage Lot Management extension allows you to automate this process by means of a setup field on the **Lot Management Setup** page.



1. Select the Search icon , enter **Lot Management Setup** and then choose the related link.
2. On the **Lot Management Setup** page, on the **Automatic Lots** FastTab, click the dropdown menu in the **Automatically Assign Lot No. on Purchase Order** field.

The following table describes the four options on the dropdown menu.

Option	Description
No Creation	Specifies that lot numbers will not be assigned automatically under any case.
Always	Specifies that a lot number automatically created either on pressing Assigned Lot(s) or on release.
On Release	Specifies that a lot number is automatically created on release of the purchase order.
Per Assigned Lot(s) Field	Specifies that a lot number is automatically created when the user clicks on the field and no Lots are assigned.

## To enable automatic creation of lot numbers

1. On the **Item Card** page, on the **Item Tracking** FastTab, click the dropdown menu in the **Item Tracking Code** field.
2. On the **Select-Item Tracking Codes** page, on the action bar, click **Edit** to open the **Item Tracking Code Card**.
3. On the **Lot No.** FastTab, turn on the **Lot Purchase Tracking** toggle. This field specifies that the inbound purchase document lines requires a lot number.

When using automatic lot number creation, the system checks the configuration of the **Item Tracking Code** page to determine whether additional tracking details are required before the line can be considered complete.


- If the **Lot Specific Tracking** or **License Plate Specific Tracking** toggle is turned on, the system updates the item tracking status to *Complete* for the automatically created lot only when all required values are assigned.
- If the **Require Expiration Date Entry** toggle is turned on, the expiration date must be entered manually, even if a lot number is created automatically.



# Manage the automatic creation of lot numbers on purchase orders

Article • 5/26/2025 • 3 min read



1. Select the Search icon , enter **Purchase Orders** and then choose the related link.
2. On the **Purchase Orders** list page, on the action bar, click **New**.
3. On the **Purchase Order** page and fill in the necessary details.
4. On the **Lines** FastTab, in the **Type** field, choose **Item**, enter **Description**, **Quantity**, **Unit of Measure Code** and **Direct Unit Cost Excl. VAT**.
  - If the **Automatically Assign Lot No. on Purchase Order** field on the **Lot Management Setup** page is set to *No Creation*, the **Item Tracking** field on the **Purchase Order** page is set as *Incomplete* and the **Assigned Lot(s)** field remains empty.  
You can click the **Assigned Lot(s)** field to open the **Item Tracking Lines** page to create the lot number(s) manually.
  - If the **Automatically Assign Lot No. on Purchase Order** field on the **Lot Management Setup** page is set to *Always*, the **Item Tracking** field on the **Purchase Order** page is set as *Complete* and the **Assigned Lot(s)** field is filled with the newly created lot number. This change is observed irrespective of the status of the document.
  - If the **Automatically Assign Lot No. on Purchase Order** field on the **Lot Management Setup** page is set to *On Release*, the **Item Tracking** field on the **Purchase Order** page is set as *Complete* and the **Assigned Lot(s)** field is filled with the newly created lot number. This change is observed only when the document is released.
  - If the **Automatically Assign Lot No. on Purchase Order** field on the **Lot Management Setup** page is set to *Per Assigned Lot(s) Field*, the **Item Tracking** field on the **Purchase Order** page is set as *Complete* and the **Assigned Lot(s)** field is filled with the newly created lot number only for the specific line that is selected.
5. On the action bar, click **Release > Release**.



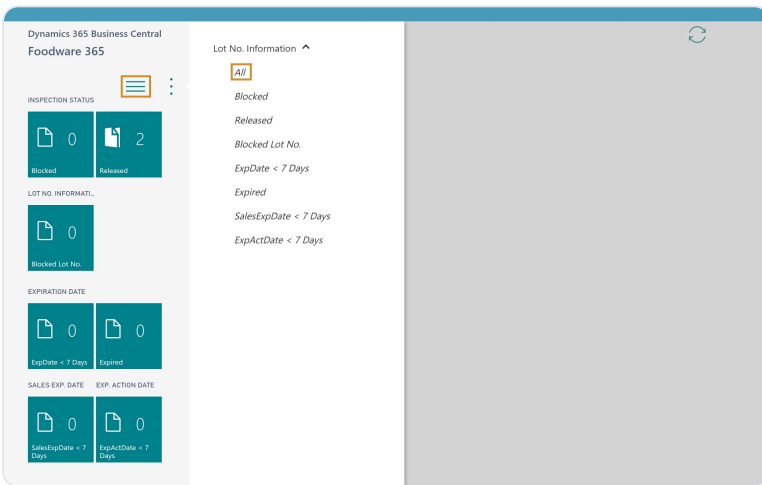
# View lot number information on a tablet

Article • 5/21/2025 • 11 min read

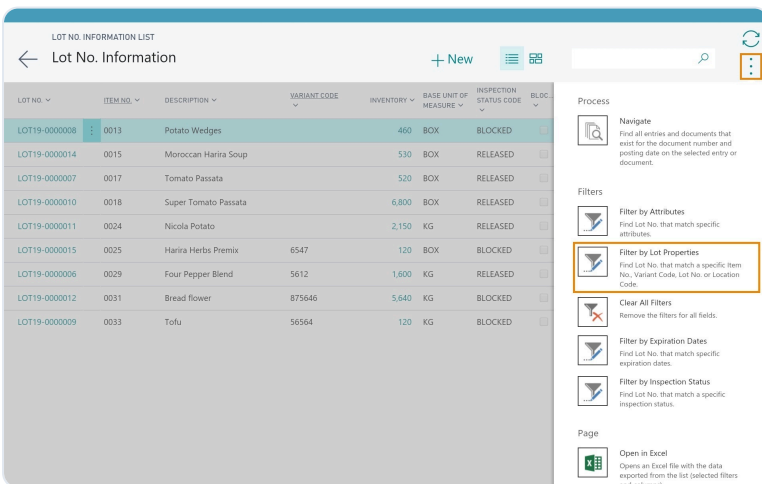
## Filter on Lot Properties

The filter **Lot Properties** only applies when the Lot No. Information list is opened on a tablet. When using a desktop, the filters can be set via the standard filter pane.

1. Open Microsoft Dynamics 365 Business Central on a tablet with the role center lot management.
2. On the action bar, click **All** to open the **Lot No. Information List** page.



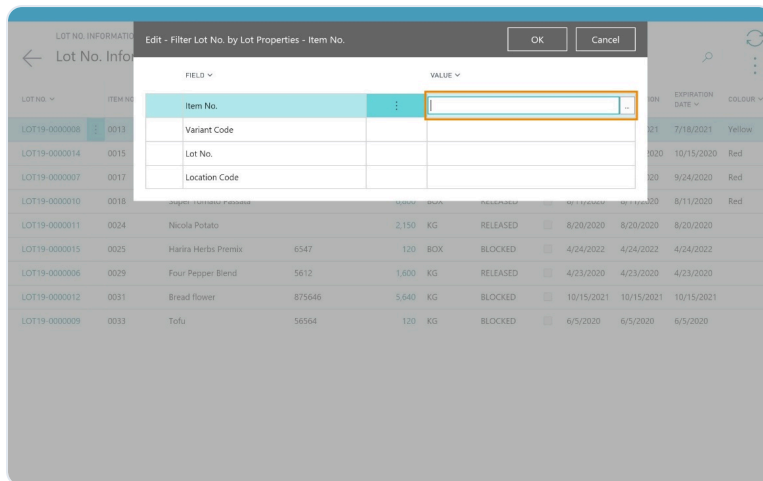
3. On the action bar, click **Filter by Lot Properties**. If other FW365 extensions are installed, such as [Expiration Management](#) or [Inspection Status](#), you can also filter on the **Expiration Dates** and **Inspection Status**. On a desktop, this can be done via the standard filter pane.



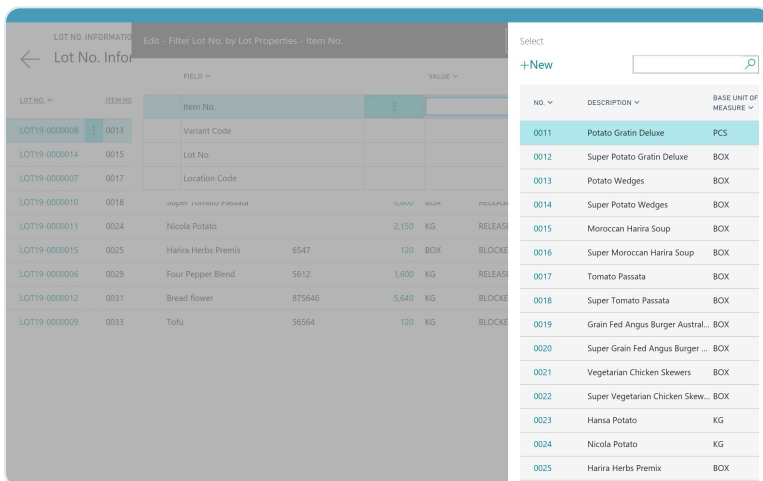
The filter includes a filter on **Item No.**, **Variant Code**, **Lot No.** and **Location Code**.



# Lot Management

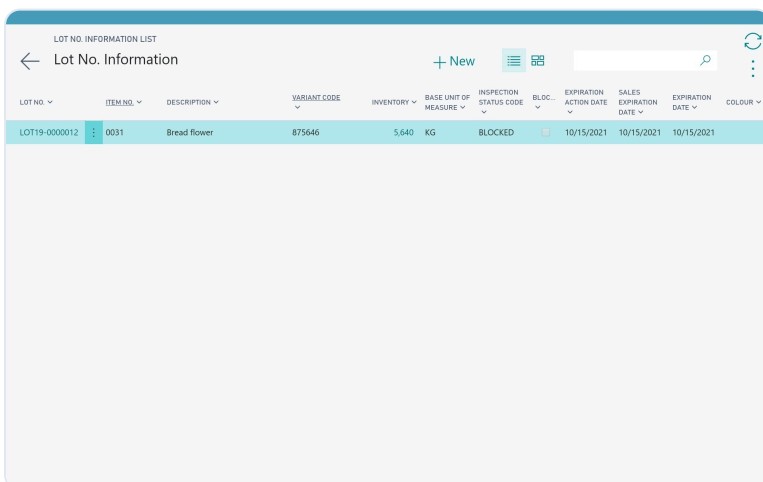


1. Click the **Value** field for the **Item No.** field.



2. Select the **Item No.** based on which the list should be filtered.

3. Click **OK**.



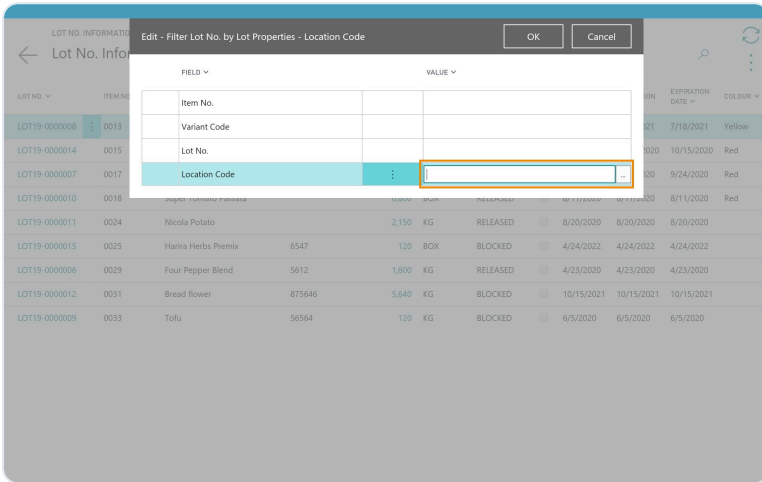
The **Lot No. Information List** is now filtered. The functionality works similarly for the filters on **Variant Code** and **Lot No.**



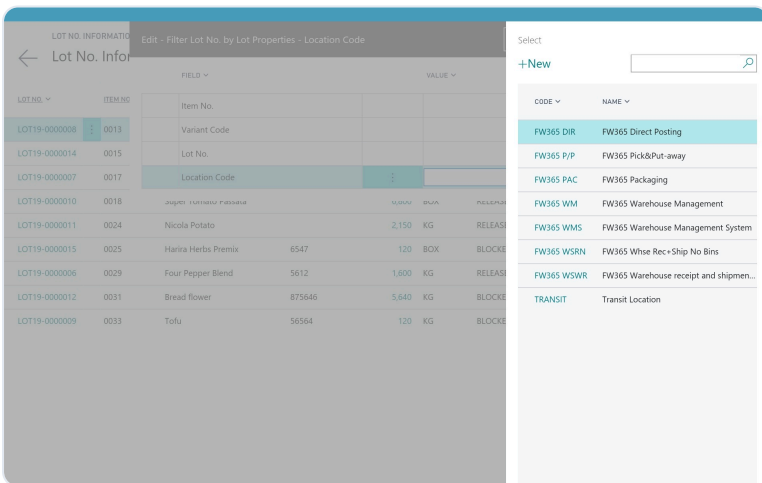
## Filter on Location Code

The **Lot No. Information List** includes a filter on the **Location Code** field. The **Inventory** field is a calculated field, which makes the **Location Code** a "Flow Filter". This makes it possible to view the inventory of a Lot No. only from a specific warehouse. When adding a filter on Location Code, the **Inventory** field is left empty for the lot numbers that don't have inventory on the filtered location instead of reducing the number of displayed records.

1. Click the **Value** field for the **Location Code** field



2. Select the **Location Code** on which the list should be filtered.



3. Click **OK**.



LOT NO. INFORMATION LIST

← Lot No. Information + New

LOT NO.	ITEM NO.	DESCRIPTION	VARIANT CODE	INVENTORY	BASE UNIT OF MEASURE	INSPECTION STATUS CODE	BLOC.	EXPIRATION ACTION DATE	SALES EXPIRATION DATE	EXPIRATION DATE	COLOUR
LOT19-000008	0013	Potato Wedges		0	BOX	BLOCKED		7/18/2021	7/18/2021	7/18/2021	Yellow
LOT19-000014	0015	Moroccan Harira Soup		0	BOX	RELEASED		10/15/2020	10/15/2020	10/15/2020	Red
LOT19-000007	0017	Tomato Passata		0	BOX	RELEASED		9/24/2020	9/24/2020	9/24/2020	Red
LOT19-000010	0018	Super Tomato Passata		0	BOX	RELEASED		8/11/2020	8/11/2020	8/11/2020	Red
LOT19-000011	0024	Nicola Potato		0	KG	RELEASED		8/20/2020	8/20/2020	8/20/2020	
LOT19-000015	0025	Harira Herbs Premix	6547	0	BOX	BLOCKED		4/24/2022	4/24/2022	4/24/2022	
LOT19-000006	0029	Four Pepper Blend	5612	0	KG	RELEASED		4/23/2020	4/23/2020	4/23/2020	
LOT19-000012	0031	Bread flower	875646	5,640	KG	BLOCKED		10/15/2021	10/15/2021	10/15/2021	
LOT19-000009	0033	Tofu	56564	120	KG	BLOCKED		6/5/2020	6/5/2020	6/5/2020	

The **Lot No. Information List** is now filtered. The **Inventory** field is left empty for the lot numbers that don't have inventory on the filtered location.

## Delete All Filters

There is a function available on the tablet to remove all filters on the **Lot No. Information List**.

1. On the action bar, click **Clear All Filters**.

LOT NO. INFORMATION LIST

← Lot No. Information + New

LOT NO.	ITEM NO.	DESCRIPTION	VARIANT CODE	INVENTORY	BASE UNIT OF MEASURE	INSPECTION STATUS CODE	BLOC.
LOT19-000008	0013	Potato Wedges		460	BOX	BLOCKED	
LOT19-000014	0015	Moroccan Harira Soup		530	BOX	RELEASED	
LOT19-000007	0017	Tomato Passata		520	BOX	RELEASED	
LOT19-000010	0018	Super Tomato Passata		6,800	BOX	RELEASED	
LOT19-000011	0024	Nicola Potato		2,150	KG	RELEASED	
LOT19-000015	0025	Harira Herbs Premix	6547	120	BOX	BLOCKED	
LOT19-000006	0029	Four Pepper Blend	5612	1,600	KG	RELEASED	
LOT19-000012	0031	Bread flower	875646	5,640	KG	BLOCKED	
LOT19-000009	0033	Tofu	56564	120	KG	BLOCKED	

**Process**

- Navigate**  
Find all entries and documents that exist for the document number and posting date on the selected entry or document.
- Filters**
  - Filter by Attributes**  
Find Lot No. that match specific attributes.
  - Filter by Lot Properties**  
Find Lot No. that match a specific Item No., Variant Code, Lot No. or Location Code.
  - Clear All Filters**  
Remove the filters for all fields.
  - Filter by Expiration Dates**  
Find Lot No. that match specific expiration dates.
  - Filter by Inspection Status**  
Find Lot No. that match a specific inspection status.
- Page**
  - Open in Excel**  
Opens an Excel file with the data exported from the list (selected filters and columns).




# Filter by vendor lot number

Article • 5/26/2025 • 2 min read

To get an overview of all the lot numbers linked to a specific vendor lot number:



1. Select the Search icon , enter **Lot No. Information List**, and then click the related link.
2. On the **Lot No. Information List** page, on the action bar, select **Filter**.
3. Click **Filter by Vendor Lot No.**  
The **Lot Origin Details** page opens.
4. Select the required **Vendor Lot No.**
5. Click **OK**.
6. The **Lot No. Information List** page now shows only the lot numbers linked to the filtered Vendor Lot No.  
A pipeline separates the lot numbers if multiple lot numbers are linked to the selected Vendor Lot No.

## To clear the Vendor Lot no. filter

On the **Lot No. Information List** page, on the action bar, select **Filters > Clear Vendor Lot No. filter**.

The filter on **Lot No.** is cleared.




# View lot origin details

Article • 10/22/2025 • 11 min read

To view origin details of lots after posting a document, 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 **Lot No.** field of the relevant record.  
The **Lot No. Information Card** page opens.
3. On the **Lot Origin Details** FastTab, you can view the origin details of lots that have been posted in the following fields:

Field	Description
Vendor Lot No.	Specifies the lot number that is supplied by the vendor.
Production Date	Specifies the original production date of the items in this lot.
Grower	Specifies the grower that has originally produced the items in this lot.
Country of Origin	Specifies the country where the item was manufactured, produced, or originally sourced. This value is automatically updated from the <b>Country of Origin</b> field on the <b>Allowed Countries of Origin</b> page associated with the selected vendor when creating a purchase order. For more information, see <a href="#">Manage the country of origin</a> .
Certificate Number	Specifies the certificate number associated with the grower to indicate that the grower meets certain requirements, for example, a fairtrade certificate.
Field Identification	Specifies the identification number of the production location where the lot number was originally produced.
Remark	Specifies additional information related to the lot origin.
Traceability Source Reference	<p>Specifies traceability information of the source, such as an address, URL, GLN, or phone number. This often represents the physical location that created the vendor lot number.</p> <ul style="list-style-type: none"> <li>• This field is visible only when the <b>View Traceability Source Reference</b> toggle on the <b>Lot Management Setup</b> page is turned on.</li> <li>• The system inherits this field value from the <b>Traceability Source Reference</b> field value on the <b>Item Tracking Lines</b> page of the associated document. For more information, see <a href="#">Manage item tracking enhancements</a>.</li> </ul>



- For production journals, if the **Copy Production Lot Details to Lot Origin Details** toggle on the **Lot Management Setup** page is turned on and the **Traceability Source Reference** field value is blank on the item tracking lines, the system inherits the **GLN** field value from the associated location. For more information, see [Add the Global Location Number](#).
- If the **GLN** field value is blank, the system inherits information from the **Location Card** page, such as the location name and address.

Additionally, the system displays the lot origin information on the **Lot Origin Details** page.

## Manage the country of origin


The Country of Origin of a lot number can be assigned manually to the **Lot Number Information** card, but it is also automatically populated when a receipt is being posted, and when output for a production or assembly order is created. The Country of Origin is also copied to the **Lot Number Information** card when a new subplot is created by using the Aptean Food & Beverage [Sublot Management](#) extension.

## The purchase process

The information about the Country of Origin is automatically added to the lot number when a lot-tracked item is being received due to a purchase.

The Country of Origin is automatically added to the Lot Origin Details when a new lot number is created during the purchase process, or an existing Lot No. Information Card is selected which doesn't contain a Lot Origin Detail. The Country of Origin is assigned when the purchase order is posted for receipt, an inventory put-away is registered or when a warehouse receipt is posted.



1. Select the Search icon , enter **Purchase Orders** and then choose the related link.
2. On the **Purchase Orders** list page, on the action bar, click **New** to create a new entry.
3. In the **Vendor Name** field, select and click the required vendor number.
4. Click **OK**.

The Country/Region in the purchase header defines which country of origin will be added automatically to the Lot Origin Details when the **Lot No. Information Card** is created.



Buy-from

Address ..... 699 Bailey Avenue

Address 2 .....

City ..... Buffalo ...

Post Code ..... US-AL 35242 ...

Country/Region ..... US

Contact No. .... CT990014 ...

Phone No. ....

Mobile Phone No. ....

Email .....

When changing the Country/Region Code in the purchase order and lot numbers have been selected in the purchase lines that contain a different Country of Origin, a message occurs. This mentions that when the selected **Country/Region** differs from at least one of the **Country of Origin** fields of the assigned lot(s), the country of origin field(s) on the Lot No. Information card(s) should be checked and updated manually if necessary.

### The production/assembly process

The information about the Country of Origin is automatically added to the lot number when during the production and assembly process output is being posted for a lot-tracked item.

The Country of Origin is automatically added to the Lot Origin Details when a new lot number (which doesn't have a Lot No. Information Card) is created when posting the output.

In this case, the Output Journal will be used as an example for posting production output.



- 1. Select the Search icon , enter **Output Journals** and then choose the related link.

When posting the production output, the country of origin derives from the **Location Code** that is selected on the line.

DEFAULT

Post/Print Line Prod. Order Open in Excel Actions Related Fewer options

Description	Run Time	Location Code	Cap. Unit of Measure Code	Output Quantity
COOKER001	0	APT PAC1	MINUTES	10





# Manage item tracking

Article • 8/27/2025 • 15 min read

Insight is given into the item tracking of an item that is lot-tracked in a document without the need to open the **Item Tracking** page. For this purpose, two fields are added various documents throughout Microsoft Dynamics 365 Business Central and will be explained in the upcoming chapters.

The fields are shown in the following documents:

- Purchase Order
- Purchase Return Order
- Sales Order
- Sales Return Order
- Transfer Order
- Warehouse Shipment
- Warehouse Receipt
- Item Journal
- Item Reclassification Journal
- Warehouse Item Journal
- Warehouse Reclassification Journal
- Physical Inventory Journal
- Production Journal
- Production Order Line
- Output Journal
- Consumption Journal
- Production Order Components
- Assembly Order
- Internal Movement

The **Item Tracking** field shows if item tracking is needed for the item entered on the document line, or if the total quantity is (not yet) entered in the item tracking for the document line. When selecting the field, it will in all cases open the **Item Tracking** page.

The **Item Tracking** field shows one of the following options:

- *Not Required*: When tracking is not required, which is the case when no item has been selected or when the item is not set up with an item tracking code.



- *Incomplete*: When the total quantity is not fully assigned in item tracking lines, or when a required lot, license plate, or expiration date is missing.
- *Complete*: When the total quantity is fully assigned and all required values (lot, license plate, and, if applicable, expiration date) are defined.


## Conditions that affect the item tracking status

The **Item Tracking** field status also depends on the configuration of the **Item Tracking Code Card** page. The following toggles on the **Item Tracking Code Card** page influence whether the system updates the status as *Complete*.

- **Lot Specific Tracking**: If this toggle is turned on, the system updates the status to *Complete* only when the lot is assigned.
- **License Plate Specific Tracking**: If this toggle is turned on, the system updates the status to *Complete* only when the license plate is assigned.
- **Require Expiration Date Entry**: If this toggle is turned on, the system updates the status to *Complete* only when the **Expiration Date** field value is entered manually on the **Item Tracking Lines** page.
- **Use Expiration Dates (without Require Expiration Date Entry)**: If only this toggle is turned on, and the **Require Expiration Date Entry** toggle is turned off, the system automatically assigns the expiration date at posting. In this case, the expiration date is not considered when updating the status on the document line.

In this case, a Purchase Order will be used as an example.



1. Select the Search icon  , enter **Purchase Orders** and then choose the related link.
2. On the **Purchase Orders** list page, on the action bar, select **New** to create a new entry on the **Purchase Order** card page.
3. Select and select the required **No.** to choose a vendor.
4. Select **OK**.
5. On the **Lines** FastTab, select the **Type** field and select the option **Item**.
6. In the **No.** field, select the dropdown menu, select and select the required **No.** to choose an item.
7. Enter **Quantity**.

When a line is entered that contains a lot-tracked item, the field **Item Tracking** is automatically changed to **Incomplete**.



12/1/2020

Options Order Fewer options

Tax Area Code	Tax Group Code	Line Amount Excl. VAT	Item Tracking	Assigned Lot(s)	Qty
		308.26	Incomplete		
		308.26	Total Excl. VAT (USD)		

8. Select the **Item Tracking** field to open the **Item Tracking Lines** page.

9. Enter **Lot No.**

Qty. to Handle 0

Qty. to Invoice 0

Item Tracking Code NO WHSE. Description

Availa... Serial No.	Serial No.	Availa... Lot No.	Lot No.	Quantity (Base)	Qty. to Handle (Base)
→ Yes		Yes	LOT001 ... ..	0	0

10. Enter **Quantity (Base)**.

Availa... Lot No.	Lot No.	Quantity (Base)	Qty. to Handle (Base)	Qty. to Invoice (Base)	Appl.-from Item Entry
Yes	LOT001	10	0	0	0

Close

11. In the **Traceability Source Reference** field, enter traceability information of the source, such as an address, URL, GLN, or phone number. This often represents the physical location that created the vendor lot number.

**Note**

This field is visible only for incoming documents.



12. Select **Close**.

13. The **Item Tracking** field still displays *Incomplete*, because the item tracking hasn't been defined completely.

Tax Area Code	Tax Group Code	Line Amount Excl. VAT	Item Tracking	Assigned Lot(s)	Qty
		308.26	Incomplete	LOT001	
		308.26	Total Excl. VAT (USD)		

The **Assigned Lot(s)** field now shows that lot number LOT001 that has been selected in the **Item Tracking Lines**. When no lot number has been assigned and when selecting on the empty **Assigned Lot(s)** field, the item tracking page would be opened as well.

When selecting on LOT001, the **Lot No. Information Card** page opens directly because only one lot number has been selected in the item tracking for the document line. If at this time, the **Lot No. Information Card** doesn't exist for the entered lot number, the card will be created immediately.

When this action is executed for a purchase, assembly, or production order line, the **Country Of Origin**, is added directly to the **Lot Origin Details**. The behavior is the same when selecting on the assist button in the **Lot No.** field in the **Item Tracking Lines** and **Inventory Put-Away**.

Vendor Lot No.	Production Date	Grower	Country Of Origin	Certificate Number
			US	

14. Select **Close** to return to the **Purchase Order** page.

15. Select the **Item Tracking** field to open the **Item Tracking Lines** page.

16. On the action bar, select **Actions > Functions > Assign Lot No.**



to Invoice	0	20				
Tracking Code	NO WHSE.	Description	No WI			
Availa... Serial No.	Serial No.	Availa... Lot No.	Lot No.	Quantity (Base)	Qty. to Handle (Base)	Qty. t
Yes		Yes	LOT001	10	10	
Yes	:	Yes	LOT010 ...	10	10	

17. Select the look up button in the **Lot No.** field.

18. Select **Close** to return to the **Item Tracking Lines** page.  
The item tracking is now completely assigned.

Availa... Lot No.	Lot No.	Quantity (Base)	Qty. to Handle (Base)	Qty. to Invoice (Base)	Appl.-from Item Entry
Yes	LOT001	10	10	10	0
Yes	LOT010 ...	10	10	10	0

**Close**

19. Select **Close**.

The **Item Tracking** field has changed to "Complete", because the item tracking has been defined for the complete quantity.

Tax Area Code	Tax Group Code	Line Amount Excl. VAT	Item Tracking	Assigned Lot(s)	Qt
		308.26	Complete	Multiple Lots	

308.26    Total Excl. VAT (USD) .....

The **Assigned Lot(s)** field shows Multiple Lot Nos, because multiple lots are assigned in the item tracking. When selecting the **Assigned Lot(s)** field, the **Lot No. Information List** opens with a filter on the lot numbers that are selected in the Item Tracking Lines in the document line.



## Lot Management

Tax Group Code	Line Amount Excl. VAT	Item Tracking	Assigned Lot(s)	Qty. to Receive
	308.26	Complete	Multiple Lots	
Total Excl. VAT (USD)				308.26

20. Select **OK**.




# Manage the Item Tracing page

Article • 5/21/2025 • 3 min read

To use the Trace functions on the Item Tracing page for all lot numbers linked to a specific vendor lot number,



1. Select the Search icon , enter **Item Tracing**, and then click the related link.  
The **Item Tracing** page opens.
2. On the **General** FastTab, in the **Vendor Lot No. Filter** field, click the lookup button to choose a value for the **Vendor Lot No. Filter**.  
The **Lot Origin Details** page opens.
3. Select the required **Vendor Lot No.**.
4. Click **OK**.  
The selected vendor lot number is used as a filter on the Lot Origin Details table. On the **Item Tracing** page, on the **General** FastTab, the **Lot No. Filter** field is filled with the lot number(s) of the lines that apply to this vendor lot number filter.  
The **Lot Nos.** are separated with a pipeline if multiple lot numbers apply to the **Vendor Lot No. Filter**.
5. You can also use the standard **Trace** functions on the **Item Tracing** page.  
You can trace where a lot or serial number assigned to the item was used, such as finding which lot a defective component came from or finding all the customers who received items containing the defective component.
6. Select the **Create Recall** action to create a recall with the item tracing filters.  
This is an alternative way to create recalls, if you want to use the item tracing with zero on your recall criteria and then convert the results of the item tracing to a permanent recall. For more information about recalls, see [Create recalls](#).




# Allowed countries of origin

Article • 10/22/2025 • 3 min read

You can set up allowed country of origin restrictions to control which countries or regions can be used as the source for items from specific vendors or sources, ensuring compliance with sourcing requirements.

To set up an allowed country of origin 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 desired item. The **Item Card** page opens.
3. On the action bar, select **Related > Item > Allowed Countries of Origin**.  
The **Allowed Countries of Origin** page opens.
4. Enter the required information in the following fields:

Field	Description
Source No.	Select the vendor or source number to which the allowed country of origin rule applies.
Vendor Name	Displays the name of the vendor based on the value selected in the <b>Source No.</b> field.
Country/Region Code	Select the code for the country or region that is allowed as the country of origin.
Country of Origin Name	Displays the full country or region name based on the selected <b>Country/Region Code</b> field value.
Default	Select the checkbox whether this country of origin is the default for the selected source and item. Only one default is allowed per combination.

To set up an allowed country of origin for a vendor, follow these steps:

1. Select the Search icon, enter **Vendors**, and then choose the related link.  
The **Vendors** page opens.
2. Select the required **No.** to open the relevant **Vendor Card** page.  
The **Item Card** page opens.
3. On the action bar, select **Related > Vendor > Allowed Countries of Origin**.  
The **Allowed Countries of Origin** page opens.
4. Enter the required information in the following fields:



Field	Description
Item No.	Select the item number for which the country of origin restriction applies.
Item Description	Displays the description of the item based on the value selected in the <b>Item No.</b> field.
Country/Region Code	Select the code for the country or region that is allowed as the country of origin for the item.
Country of Origin Name	Displays the full country or region name based on the Country/Region Code.
Variant Code	Specifies the variant of the item (if applicable) for which the country-of-origin restriction applies.
Default	Select the checkbox to set this country of origin as the default for the selected source and item. Only one default is allowed per combination.

To set up an allowed country of origin for a purchase order, follow these steps:

1. Select the Search icon, enter **Purchase Orders**, and then choose the related link.  
The **Purchase Orders** page opens
2. On the **Lines** FastTab, select **Line > Allowed Countries of Origin**.  
The **Allowed Countries of Origin** page opens.
3. Enter the required information in the following fields:

Field	Description
Country/Region Code	Select the code for the allowed country or region of origin for the purchase order line item.
Country of Origin Name	Displays the full country or region name corresponding to the selected code.
Default	Select whether this country of origin should be set as the default for the order line.



# Manage recalls

Article • 5/21/2025 • 1 min read

The system provides comprehensive item traceability to support effective recall management and regulatory compliance. In the event of a product recall, you can take corrective action, track affected items, and generate necessary documents, such as purchase return orders and sales credit memos to communicate efficiently with trading partners.

The system supports the entire recall process, from initial identification to documentation and audit readiness. Whether you're responding to a contamination incident or preparing for an audit for the Food Safety Modernization Act (FSMA), the recall functionality helps you maintain traceability and meet regulatory standards.

## Note

This functionality supports compliance with FSMA regulations implemented by the U.S. Food and Drug Administration (FDA).



# Manage traceability information

Article • 5/21/2025 • 1 min read

To manage traceability information of the source, you can:

- Turn on the **View Traceability Source Reference** toggle on the **Lot Management Setup** page, to view the **Traceability Source Reference** field on the **Item Tracking Lines** page for output journals, purchase orders, purchase invoices, and production orders.  
Turn on the **Copy Production Lot Details to Lot Origin Details** toggle if you want the system to copy lot details from production journals to lot origin details upon posting.  
For more information, see [Set up lot management](#).
- Enter traceability information of the source in the **Traceability Source Reference** field on the **Item Tracking Lines** page. For more information, see [Manage item tracking enhancements](#).
- View traceability information of the source in the **Traceability Source Reference** field on the **Lot Origin Details** FastTab of the **Lot No. Information Card** page after posting a document. For more information, see [View lot origin details](#).



# Add the Global Location Number

Article • 5/21/2025 • 1 min read

You can add a valid 13-digit Global Location Number (GLN) in the **GLN** field on locations, order addresses, and farms.

## Note

This field can be added via personalization.

The **GLN** field is available on the:

- **Address & Contact** FastTab of the **Location Card** page.
- **General** FastTab of the **Order Address** page.
- **General** FastTab of the **Farm** page.

## Note

This page is visible only when the Aptean [Commodity Harvest Planning](#) extension is installed.




# Create recalls

Article • 7/2/2025 • 3 min read

You can create recalls to track items in cases of affected products and generate necessary documents, such as purchase return orders and sales credit memos for the item. Additionally, you can change the inspection status for an item on a lot level to prevent further distribution or usage of the item.

To create a recall, follow these steps:



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

Field	Description
No.	Specifies the recall number assigned automatically based on the number series defined in the <b>Recall Nos.</b> field on the <b>Lot Management Setup</b> page. Alternatively, you can manually enter the recall number, if required.
Description	Enter a description for the recall document.
Document Date	Specifies the creation date of the recall document. You can manually change the date, if required.
Return Reason	Select the reason for the recall of items from the <b>Return Reasons</b> list page.
Status	Specifies the status of the recall document: <b>_Open_</b> , <b>_In progress_</b> , and <b>_Closed_</b> . You can use the <b>Change Status</b> action to change the status of the recall.
Item No. Filter	Select an item number to filter the recall trace calculation.
Variant Filter	Select an item variant code to filter the recall trace calculation.
Lot No. Filter	Select a lot number to filter the recall trace calculation.
License Plate Filter	Select a license plate number to filter the recall trace calculation.
Vendor Lot No. Filter	Select a vendor lot number to filter the recall trace calculation.
Serial No. Filter	Select a serial number to filter the recall trace calculation.



Show Components Option	Select whether the system must display the components of the traced item. The available options are <i>_Item-tracked Only_</i> and <i>_All_</i> .
Trace Method	Specifies the trace method. This field value is set to <i>_Origin -&gt; Usage_</i> .

**Note**

You must set at least one filter to proceed with the calculation.

- On the action bar, select **Calculate** to calculate the recall information based on the selected filter(s).  
The system:
  - Updates the **Status** field value from *Open* to *In progress*.
  - Calculates and updates the lines on the **Orders** and **Lots** FastTab.
  - Updates the item tracking information for the recall on the **Recall Item Trace** page.
- Select the **Create Withdrawal Segments** action to create item withdrawal segments with the recall tracing details.
- Select the **Recall Item Trace** action to open the **Recall Item Trace** page and view the item tracing information for the recall. For more information, see [Manage recall item trace](#).
- Select the **Export** action to export the recall information to an Excel document. For more information, see [Export recall information](#).
- Select the **Find Entries** action to find existing entries and documents based on the document number and posting date of a document.
- On the **Orders** FastTab, you can view information about the posted purchase and sales orders that contain an item in the following fields.

**Note**

The system combines items with the same document number, item number, variant code, and source unit of measure to one line.

Field	Description
Source Type	Specifies whether the source is a customer or vendor.
Source No.	Specifies the number of the source customer or vendor.
Source Name	Specifies the name of the source document the item is traced from.



Source Email	Specifies the email address of the source customer or vendor. You can select this value to draft an email to the customer or vendor.
Source Phone No.	Specifies the phone number of the source customer or vendor. You can select this value to dial the customer or vendor.
Document No.	Specifies the source document number the item is traced from.
Invoice No.	Specifies the invoice number associated with the document.
Ext. Document No.	Specifies the external document number.
Posting Date	Specifies the date when the traced item was posted.
Item No.	Specifies the number of the traced item.
Item Description	Specifies the description of the traced item.
Lot No.	Specifies the traced lot number. You can select this value to view the <b>Lot No. Information Card</b> page. If there are multiple lots associated with the order line, this field value is set to <code>_MULTIPLE_</code> and you can view the <b>Lot No. Information List</b> page when you select it.
Quantity	Specifies the quantity of the traced item in the line. In cases of multiple lots, the system displays the total quantity of the item.
Base Unit of Measure	Specifies the base unit of measure of the item.
Source Unit of Measure	Specifies the source unit of measure of the item.

10. Select order lines and then select the following actions to generate necessary documents:

Action	Description
Create Purchase Claims	Create a purchase claim for the orders selected. This field is available only when the Aptean <a href="#">Claims</a> extension is installed.
Create Sales Claims	Create a sales claim for the orders selected. This field is available only when the Aptean <a href="#">Claims</a> extension is installed.
Create Purchase Return	Create a purchase return order for the orders selected.
Create Purchase Credit Memo	Create a purchase credit memo for the orders selected.
Create Sales Return	Create a sales return order for the orders selected.
Create Sales Credit Memo	Create a sales credit memo for the orders selected.



Show Document	View the related document.
---------------	----------------------------

The system creates the relevant document with the item details.

11. On the **Lots** FastTab, you can view information about all the lots that contain an item in the following fields:

ⓘ Note

The system combines lots with the same lot number, item number, variant code, location, and base unit of measure to one line.

Field	Description
Item No.	Specifies the number of the traced item.
Description	Specifies the description of the traced item.
Location	Specifies the location of the traced item.
Lot No.	Specifies the traced lot number.
Variant Code	Specifies the traced variant code of the item.
Total Qty.	Specifies the total quantity of the traced item in the lot.
On-Hand Qty.	Specifies the quantity of the traced item in the lot that has not been processed yet. You can select this field value to view the related item ledger entries.
Base Unit of Measure	Specifies the base unit of measure of the item.
Inspection Status	Specifies the inspection status of the item.

12. On the action bar, select the **Change Inspection Status** action to change the inspection status of the selected lots. For example, from *CHECKED* to *BLOCKED*.

ⓘ Note

The **Inspection Status** field and the **Change Inspection Status** action are visible only when the Apteon [Inspection Status](#) extension is installed.

You can view additional information about the recalls on the **Recalls Information** FactBox. For more information, see [Additional information on the FactBox](#).



# Manage recall item trace

Article • 5/21/2025 • 1 min read

To view the recall item trace information on lot levels,

- On the **Recall** card page, on the action bar, select **Recall Item Trace**.  
The **Recall Item Trace** page opens.

You can view recall item trace information in the following fields:

Field	Description
Description	Specifies the description of the document associated with the item.
Serial No.	Species the serial number of the traced document.
Lot No.	Specifies the lot number of the traced item.
License Plate No.	Specifies the license plate number of the traced item.
Item No.	Specifies the traced item number.
Item Description	Specifies the description of the traced item.
Variant Code	Specifies the variant code of the traced item.
Location Code	Specifies the location of the traced item.
Quantity	Specifies the quantity of the traced item in the document.
Remaining Quantity	Specifies the remaining quantity that has not been processed.
Already Traced	Specifies whether additional transaction history for the line has already been traced by other lines.
Vendor Lot No.	Specifies the associated vendor lot number.
Production Date	Specifies the associated production date.
Traceability Source Reference	Specifies traceability information of the source, such as an address, URL, GLN, or phone number. This often represents the physical location that created the vendor lot number.



 Note

- By default, the system displays the recall item trace information in the advanced view. You can select the **Show Simplified View** action to view a simplified version of the information. The system combines information based on the lot number, variant code, location code, and document number. - When in simplified view, you can select the **Show Advanced View** action to switch back to the advanced view.



# Export recall information

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To export the recall information to an Excel document, follow these steps:

1. On the **Recall** card page, on the action bar, select **Export**.

The system displays a confirmation message.

2. Select **Yes**.

The system exports the recall information to a .xlsx file stored locally. The exported file includes three worksheets, you can view all inbound transactions on the **Receipts** worksheet, outbound transactions on the **Shipments** worksheet, and production transactions on the **Transformations** worksheet.

## Note

The data on the exported Excel document aligns with FSMA regulatory requirements.

## See also

- [Receipts worksheet](#)
- [Shipments worksheet](#)
- [Transformations worksheet](#)



# Receipts worksheet

Article • 7/2/2025 • 3 min read

On the **Receipts** worksheet of the exported Excel document, you can view all inbound transactions in the following fields:

Field	Description
Lot No.	Specifies the lot number associated with the item.
Vendor Lot No.	Specifies the vendor lot number associated with the item.
Quantity	Specifies the total quantity of the item in this lot.
Unit of Measure	Specifies the unit used to measure the item.
Item Description	Specifies the description of the item.
Item Category Description	Specifies the description of the associated item category.
Previous Source Name	Specifies the name associated with the source vendor. This value is derived from the buy-from details of the posted purchase document.
Previous Source Phone No.	Specifies the phone number associated with the source vendor. This value is derived from the buy-from details of the posted purchase document.
Previous Source Address	Specifies the address associated with the source vendor. This value is derived from the buy-from details of the posted purchase document.
Previous Source City	Specifies the city associated with the source vendor. This value is derived from the buy-from details of the posted purchase document.
Previous County/State/Region	Specifies the county, state, or region associated with the source vendor. This value is derived from the buy-from details of the posted purchase document.
Previous Source Zip/Postal	Specifies the zip or postal code associated with the source vendor. This value is derived from the buy-from details of the posted purchase document.
Previous Source Country	Specifies the country associated with the source vendor. This value is derived from the buy-from details of the posted purchase document.
Receipt Source Location Name	Specifies the location associated with the ship-to details of the location.
Receipt Source Phone No.	Specifies the phone number associated with the ship-to details of the location.
Receipt Source Address	Specifies the address associated with the ship-to details of the location.



Receipt Source City	Specifies the city associated with the ship-to details of the location.
Receipt County/State/Region	Specifies the county, state, or region associated with the ship-to details of the location.
Receipt Source Zip/Postal	Specifies the zip or postal code associated with the ship-to details of the location.
Receipt Source Country	Specifies the country associated with the ship-to details of the location.
Receipt Date	Specifies the posting date of receipt derived from item ledger entries.
Traceability Source Reference	Specifies the traceability information of the source, such as an address, URL, GLN, or phone number. This value is derived from the lot origin details.
Reference Document Type	Specifies the type of source document the lot originated from.
Reference Document No.	Specifies the number of the source document.
Reference Document Type 2	Specifies the type of document the lot is posted in.
Reference Document No. 2	Specifies the number of the posted document.



# Shipments worksheet

Article • 7/2/2025 • 3 min read

On the **Shipments** worksheet of the exported Excel document, you can view all outbound transactions in the following fields:

Field	Description
Lot No.	Specifies the lot number associated with the item.
Vendor Lot No.	Specifies the vendor lot number associated with the item.
Quantity	Specifies the total quantity of the item in this lot.
Unit of Measure	Specifies the unit used to measure the item.
Item Description	Specifies the description of the item.
Item Category Description	Specifies the description of the associated item category.
Previous Source Name	Specifies the name associated with the source customer. This value is derived from the associated location.
Previous Source Phone No.	Specifies the phone number associated with the source customer. This value is derived from the associated location.
Previous Source Address	Specifies the address associated with the source customer. This value is derived from the associated location.
Previous Source City	Specifies the city associated with the source customer. This value is derived from the associated location.
Previous County/State/Region	Specifies the county, state, or region associated with the source customer. This value is derived from the associated location.
Previous Source Zip/Postal	Specifies the zip or postal code associated with the source customer. This value is derived from the associated location.
Previous Source Country	Specifies the country associated with the source customer. This value is derived from the associated location.
Receipt Source Location Name	Specifies the location associated with the ship-to customer. This value is derived from the ship-to details of the posted sales document.
Receipt Source Phone No.	Specifies the phone number associated with the ship-to customer. This value is derived from the ship-to details of the posted sales document.



Receipt Source Address	Specifies the address associated with the ship-to customer. This value is derived from the ship-to details of the posted sales document.
Receipt Source City	Specifies the city associated with the ship-to customer. This value is derived from the ship-to details of the posted sales document.
Receipt County/State/Region	Specifies the county, state, or region associated with the ship-to customer. This value is derived from the ship-to details of the posted sales document.
Receipt Source Zip/Postal	Specifies the zip or postal code associated with the ship-to customer. This value is derived from the ship-to details of the posted sales document.
Receipt Source Country	Specifies the country associated with the ship-to customer. This value is derived from the ship-to details of the posted sales document.
Receipt Date	Specifies the posting date of shipment derived from item ledger entries.
Traceability Source Reference	Specifies the traceability information of the source, such as an address, URL, GLN, or phone number. This value is derived from the lot origin details.
Reference Document Type	Specifies the type of source document the lot originated from.
Reference Document No.	Specifies the number of the source document.
Reference Document Type 2	Specifies the type of document the lot is posted in.
Reference Document No. 2	Specifies the number of the posted document.



# Transformations worksheet

Article • 7/2/2025 • 2 min read

On the **Transformations** worksheet of the exported Excel document, you can view all production transactions, including input and output details, in the following fields:

Field	Description
Lot Code of Input	Specifies the lot number associated with the input item.
Traceability Lot Code of Input	Specifies the vendor lot number associated with the input item.
Product Description of Input	Specifies the product description of the input item.
Item Category Description of Input	Specifies the item category description of the input item.
Quantity of Input	Specifies the quantity of the input item consumed.
Unit of Measure of Input	Specifies the unit used to measure the input item.
Lot Code of Output	Specifies the lot number associated with the output item.
New Traceability Lot Code	Specifies the vendor lot number associated with the output item.
Product Description of Output	Specifies the product description of the output item.
Item Category Description of Output	Specifies the item category description of the output item.
Quantity of Output	Specifies the quantity of the output item produced.
Unit of Measure of Output	Specifies the unit used to measure the output item.
Transformation Source Location Name	Specifies the location associated with the production order.
Transformation Source Phone No.	Specifies the phone number associated with the location.
Transformation Source Address	Specifies the address associated with the location.
Transformation Source City	Specifies the city associated with the location.
Transformation Source County/State/Region	Specifies the county, state, or region associated with the location.
Transformation Source Zip/Postal	Specifies the zip or postal code associated with the location.
Transformation Source Country	Specifies the country associated with the location.



Transformation Date	Specifies the posting date of the output item derived from the item ledger entries.
Traceability Source Reference	Specifies the traceability information of the source, such as an address, URL, GLN, or phone number associated with the output item.
Reference Document Type	Specifies the type of document the data is derived from.
Reference Document No.	Specifies the number of the document the data is derived from.



## Additional information on the FactBox

Article • 5/21/2025 • 2 min read

You can view additional information about the recalls on the **Recalls Information** FactBox of the **Recall** card page in the following fields:

Field	Description
<b>Related Entries</b>	
Customers	Specifies the number of associated customers.
Vendors	Specifies the number of associated vendors.
<b>Quantities</b>	
Received Quantity	Specifies the total quantity received.
Sold Quantity	Specifies the total quantity sold.
Purchase Returned Quantity	Specifies the total quantity returned to vendors.
Sales Returned Quantity	Specifies the total quantity returned from customers.
Physical Journal Quantity	Specifies the total quantity in physical journal.
Remaining Quantity	Specifies the remaining quantity that has not been processed yet.
<b>Purchase Documents</b>	
Posted Purchase Receipts	Specifies the number of associated posted purchase return shipments.
Posted Purchase Invoices	Specifies the number of associated posted purchase invoices.
Posted Purchase Return Shipments	Specifies the number of associated posted purchase return shipments.
Posted Purchase Credit Memos	Specifies the number of associated posted purchase credit memos.
<b>Sales Documents</b>	
Posted Sales Shipments	Specifies the number of associated shipped sales orders.
Posted Sales Invoices	Specifies the number of associated posted sales invoices.
Posted Sales Returns Receipts	Specifies the number of associated posted sales return receipts.
Posted Sales Credit Memos	Specifies the number of posted sales credit memos.



 Note

You can select the values in the **Related Entities, Purchase Documents, and Sales Documents** groups to open the related documents.




# Record interaction support

Article • 5/26/2025 • 3 min read

You can create an interaction to record the affected customer(s)/Item(s)/Lot(s) to notify them of an impending item withdrawal.



1. Select the Search icon , enter **Item Tracing** and then choose the related link.
2. On the **General** FastTab, enter the **Item Filter** field with the appropriate **Item No.**
3. Enter the **Lot No. Filter** field with the appropriate **Lot No.**
4. In the action bar, select **Process > Trace**.  
Various customers/shipments are displayed in the lines.
5. In the action bar, select **Actions > Functions > Create Withdrawal Segments**.  
The **Item Withdrawal Segments** page is opened.
6. On the **Options** FastTab, enter **Description** with the description of the traced item.
7. Enter **Interaction Template** with the interaction template code of the interaction involving the segment.
8. Click **OK** to create the interaction.
9. Click **Yes** to open the interaction.  
The **Segment** page is opened. The entries with the **Source Type Customer** are populated in the lines of the **Segment** page.  
The **Item Ledger Entry No.**, **Location Code**, **Item No.**, **Lot No.**, **Source No.**, **Document No.**, **Contact Phone No.**, and **Contact Email** can be viewed in the segment lines table. The details in these fields will flow to the relevant interaction log entry when clicking the **Log** action on the action bar.

## Note

If none of the entries contain the **Source Type Customer**, you'll see the following error *No interaction has been created*.




# Create a Word template

Article • 5/26/2025 • 3 min read

You can define a standard communication template when contacting customers of an item withdrawal.



1. Select the Search icon , enter **Word Templates** and then choose the related link.
2. Select and click the required **Code** to select the appropriate record associated with the 'Interaction Merge Data' type.
3. In the action bar, click **New > Create** a template to open the **Create a Word Template** page.
4. Click **Interaction Merge Data**.
5. Click **Next**.
6. Click **Add a related entity (simple)**.
7. On the **Related Entity** page, click the **Name** field and choose the required **ID** based on the **Object Caption**. Customer, shipment, item ledger entry, Item, Lot No. Information, Location tables are made available along with the standard tables.
8. Click **OK** on the **Selected related entity for the Word template** page.
9. Click **OK** on the **Related Entity** page.
10. Repeat steps 7 through 9 to add more **Related Entities**.
11. Click **Next** on the **Create a Word Template** page.
12. Click **Download** a blank template to download the blank template containing all the fields of the selected tables. A .zip file with the word and excel document will be downloaded. Extract the files and open the word document.
13. In the word document, on the menu bar, click **Mailings > Insert Merge Field** to see all the fields present in the document.
14. Select the required field and click **Insert** to include the table in the document.
15. Save the document.
16. On the **Create a Word Template** page, click **Next**.
17. Click **Upload the template**.
18. Click **Choose** and select the saved word document.  
The document will be included as a new word template in the **Word Templates** page.



# View lot details on FactBoxes

Article • 5/21/2025 • 1 min read

You can now quickly see more details of the lot number of the selected line on the **Item Tracing**, **Item Tracking**, **Inventory Pick** and **Inventory Put-away** pages.

On the **Lot Details** fact box, you can see the following fields: **Item No.**, **Variant Code**, **Lot No.**, **Description**, **Certificate Number**, **Blocked**, **Inspection Status Code** (if ISS is installed), **Expiration Action Date**, **Sales Expiration Date**, **Expiration Date**, **Inventory** and **Expired Inventory**.

With this, you can gain insight into the lot details of a specific lot number. The same fact box is also available in the **Item Tracking**, **Item Tracking Summary**, **Inv. Pick Subform** and **Inv. Put-away Subform** pages.



# Manage output journals

Article • 5/21/2025 • 2 min read


On the **Output Journals** page, you can assign the lot number and delete the item tracking code for the applicable routing lines of multiple released production orders.

## Prerequisites

- On the relevant **Item Card** page, the following fields must be filled in:
  1. The **Item Tracking Code** field
  2. Either the **Lot Nos.** or **Lot No. Profile** field
- On the relevant **Item Tracking Code Card** page, the **Lot Specific Tracking** toggle should be enabled.

## To assign the lot number and delete the item tracking code for released production orders



1. Select the Search icon , enter **Output Journals**, and then choose the related link.  
The **Output Journals** page opens.
2. In the **Order No.** field, enter the relevant production order number.
3. On the action bar, select **Process > Explode Routing**.  
The routing lines for the selected production order are displayed.
4. On the action bar, select **Actions > Functions >**
  - **Assign Lot No.** – Select this action to assign the lot number to the applicable routing lines.
  - **Delete Item Tracking** – Select this action to delete the item tracking code that is assigned for the applicable routing lines.



# Integrations

Article • 7/2/2025 • 1 min read

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

- [Aptean Claims](#)
- [Aptean Commodity Harvest Planning](#)
- [Aptean Expiration Management](#)
- [Aptean Inspection Status](#)
- [Aptean License Plating](#)
- [Aptean Protein Essentials](#)
- [Aptean Shop Floor Production \(BC\)](#)



# Aptean Claims

Article • 5/21/2025 • 1 min read

When the Aptean Lot Management extension is used in conjunction with the Aptean [Claims](#) extension, you can create purchase or sales claims directly from the **Recall** card page. For more information, see [Create recalls](#).



# Aptean Commodity Harvest Planning

Article • 5/21/2025 • 1 min read

When the Aptean Lot Management extension is used in conjunction with the Aptean [Commodity Harvest Planning](#) extension, the system displays the **GLN** field on the **Farm** page. For more information, see [Add the Global Location Number](#).



# Aptean Expiration Management

Article • 5/21/2025 • 1 min read

When the Aptean Lot Management extension is used in conjunction with the Aptean [Expiration 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 Inspection Status

Article • 5/21/2025 • 1 min read

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

- Change the inspection status for lots on the **Lot No. Information Card** page.
- Filter lots by inspection status on the **Lot No. Information List** page. For more information, see [View lot number information on a tablet](#).
- View the inspection status code on the **Lot Details** FactBox. For more information, see [View lot details on FactBoxes](#).
- Change the inspection status for lots directly from the **Recall** card page. For more information, see [Create recalls](#).



# Aptean License Plating

Article • 5/21/2025 • 1 min read

When the Aptean Lot Management extension is used in conjunction with the Aptean [License Plating](#) extension, the system ensures the lot management functionality works with license plate tracked items.



# Aptean Protein Essentials

Article • 5/21/2025 • 1 min read

The Aptean Lot Management extension must be installed to use the Aptean [Protein Essentials](#) extension.



# Aptean Shop Floor Production (BC)

Article • 7/2/2025 • 1 min read

When the Aptean Lot Management extension is used in conjunction with the Aptean [Shop Floor Production \(BC\)](#) extension, you can define how the lot number is previewed on the **Shop Floor Production Setup** page. For more information, see [Set up shop floor production](#).

