

# User Manual

# Aptean Food and Beverage ERP

**Non Conformances**

Product Documentation



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## Non Conformances

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# Release notes

Article • 7/22/2026 • 1 min read

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

| Date           | Release version            | Description       |
|----------------|----------------------------|-------------------|
| July 2026      | <a href="#">2602.0.0.0</a> | Major release     |
| June 2026      | <a href="#">2601.4.0.0</a> | Minor release     |
| May 2026       | <a href="#">2601.3.0.0</a> | Minor release     |
| February 2026  | <a href="#">2601.2.0.0</a> | Stability release |
| February 2026  | <a href="#">2601.1.0.0</a> | Platform release  |
| January 2026   | <a href="#">2601.0.0.0</a> | Feature release   |
| November 2025  | <a href="#">2504.1.0.0</a> | Stability release |
| October 2025   | <a href="#">2504.0.0.0</a> | Feature release   |
| October 2025   | <a href="#">2503.2.0.0</a> | Stability release |
| September 2025 | <a href="#">2503.1.0.0</a> | Stability release |
| August 2025    | <a href="#">2503.0.0.0</a> | Feature release   |
| August 2025    | <a href="#">2502.3.0.0</a> | Stability release |
| July 2025      | <a href="#">2502.2.0.0</a> | Platform release  |
| July 2025      | <a href="#">2502.1.0.0</a> | Stability release |
| June 2025      | <a href="#">2502.0.0.0</a> | Feature release   |
| May 2025       | <a href="#">2501.3.0.0</a> | Stability release |
| April 2025     | <a href="#">2501.2.0.0</a> | Stability release |
| March 2025     | <a href="#">2501.1.0.0</a> | Stability release |
| February 2025  | <a href="#">2501.0.0.0</a> | Feature release   |
| October 2024   | <a href="#">2401.5.0.0</a> | Platform release  |

## Non Conformances

|                |                               |                   |
|----------------|-------------------------------|-------------------|
| October 2024   | <a href="#">2401.4.0.0</a>    | Platform release  |
| October 2024   | <a href="#">2401.3.0.0</a>    | Stability release |
| August 2024    | <a href="#">2401.2.0.0</a>    | Stability release |
| June 2024      | <a href="#">2401.1.0.0</a>    | Stability release |
| May 2024       | <a href="#">2401.0.0.0</a>    | Feature release   |
| April 2024     | <a href="#">2301.3.0.0</a>    | Stability release |
| November 2023  | <a href="#">2301.2.0.0</a>    | Stability release |
| November 2023  | <a href="#">2301.1.0.0</a>    | Stability release |
| September 2023 | <a href="#">1.10.115183.0</a> | Stability release |
| February 2023  | <a href="#">1.10.80266.0</a>  | Feature release   |
| November 2022  | <a href="#">1.9.68274.0</a>   | Stability release |
| May 2022       | <a href="#">1.8.48754.0</a>   | Stability release |



# 2602.0.0.0

Release Note • 7/22/2026 • 2 min read

## Features

With the features added in this release of the Aptean Non Conformances extension,

- You can link an existing posted quality control check to a non-conformance by using the **Link Posted Quality Control Check** action on the **Customer Non-Conformance**, **Vendor Non-Conformance**, and **Internal Non-Conformance** pages. This complements the existing **Link Quality Control Check** action, which lists only open checks, so a failed or completed check can be referenced as evidence on the non-conformance. For more information, see [Integration with quality control](#).
- Capture and retain root cause details for a non-conformance using the new **Root Cause Description** field, available on the **Customer Non-Conformance**, **Internal Non-Conformance**, and **Vendor Non-Conformance** pages, and their corresponding **Closed** pages.
- Indicate the effectiveness of a corrective action using the new **Effective** field on the **Vendor Non-Conformance** page.

## UI/UX changes

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

- The **Link Posted Quality Control Check** action has been added to the **Customer Non-Conformance**, **Vendor Non-Conformance**, and **Internal Non-Conformance** pages.
- The **Root Cause Description** field has been added to the following pages:
  - Customer Non-Conformance
  - Closed Customer Non-Conformance
  - Internal Non-Conformance
  - Closed Internal Non-Conformance
  - Vendor Non-Conformance
  - Closed Vendor Non-Conformance
- The **Effective** field has been added to the **Vendor Non-Conformance** page.



# 2601.4.0.0

Release Note • 6/24/2026 • 1 min read

## Resolved issues

The following issue has been resolved in this release.

| ID     | Description                                                                                                                                                                                                                                                                  |
|--------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 376338 | An issue occurs when creating a purchase credit memo or purchase return order from a vendor non-conformance line because the system uses the original quantity from the posted purchase receipt instead of the modified quantity entered on the <b>Non-Conformance</b> page. |



# 2601.3.0.0

Release Note • 5/27/2026 • 2 min read

## Enhancements/Modifications

With this release of the Aptean Non-Conformances extension, you can print records from the **Customer Non-Conformance** page, similar to vendor non-conformance, and configure separate reports for sales and purchases on the **Non-Conformance Setup** page.

## UI/UX changes

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

- The **Print** action has been added to the **Reports** group on the **Customer Non-Conformance** page.
- The **Sales Report ID** field has been added and the **Report ID** field has been renamed as **Purchase Report ID** on the **Non-Conformance Setup** page.

## Resolved issues

The following issues have been resolved in this release.

| ID     | Description                                                                                                                                                                                                                                                                                                                                                             |
|--------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 371520 | The system incorrectly updates the <b>Due Date</b> field value in the NC Planner task of a synced non-conformance action to one day earlier than the <b>Deadline</b> field value defined on the <b>NC Actions</b> page, resulting in a mismatch between the planner task due date and the expected deadline value.                                                      |
| 369659 | The system fails to refresh the planner when switching between Microsoft Teams channels associated with Non-Conformance documents. This issue occurs after the <b>Status</b> field value on the <b>Non-Conformances</b> page is updated from <i>New</i> to <i>In Progress</i> , resulting in the planner from the previously opened channel continuing to be displayed. |



# 2601.2.0.0

Release Note • 2/25/2026 • 1 min read

## Enhancements/Modifications

With this release of the Aptean Non-Conformances extension, the references of deprecated *Document Attachment Factbox* part has been removed in the following to ensure compatibility with Business Central, version 28.

- DocumentAttachSubscr09FDW
- CustomerNCClosedFDW
- CustomerNCFDW
- CustomerNCListClosedFDW
- CustomerNCListFDW
- InternalNCClosedFDW
- InternalNCFDW
- InternalNCListClosedFDW
- InternalNCListFDW
- VendorNCClosedFDW
- VendorNCFDW
- VendorNCListClosedFDW
- VendorNCListFDW

## Resolved issues

The following issue has been resolved in this release.

| ID     | Description                                                                                                                                                                                     |
|--------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 344587 | The system fails to load planner tasks in Microsoft Teams after they are created from the <b>Non Conformances</b> page, although the tasks are successfully generated and available in planner. |



# 2601.1.0.0

Release Note • 2/11/2026 • 1 min read

## Enhancements/Modifications

With this release of the Aptean Non Conformances extension, the *Document Attachment Factbox* caption has been renamed to *Doc. Attachment List Factbox* in the following codeunits to ensure compatibility with Business Central, version 28.

- DocumentAttachSubscr09FDW
- CustomerNCClosedFDW
- CustomerNCFDW
- CustomerNCListClosedFDW
- CustomerNCListFDW
- InternalNCClosedFDW
- InternalNCFDW
- InternalNCListClosedFDW
- InternalNCListFDW
- VendorNCClosedFDW
- VendorNCFDW
- VendorNCListClosedFDW
- VendorNCListFDW



# 2601.0.0.0

Release Note • 1/28/2026 • 2 min read

## Features

With the features added in this release of the Aptean Non Conformances extension,

- You can track the location where a non-conformance originated by using the **Origin Location Code** field value on the **Non-Conformances** page. This field is available on the **Location Card** page and is editable while the non-conformance is not in a *Closed* status.
- You can classify incidents that require formal corrective and preventive action (CAPA) processes by selecting the **CAPA** checkbox on non-conformance categories. For more information, see [Create non-conformances with CAPA category](#).
- You can add comments to non-conformance lines and assign severity codes to categorize the criticality of non-conformances. For more information, see [Add severity codes and line comments](#).
- You can create and track follow-up actions for non-conformances, specifying action types as either *Corrective* or *Preventive*. For more information, see [Create and track follow-up actions](#).
- You can specify the date of purchase for customer non-conformances and track origin location codes for all non-conformances. For more information, see [Add purchase dates and origin locations](#).
- All non-conformance pages have been modified to support CAPA category functionality. For more information, see [Create non-conformances with CAPA category](#).
- You can configure severity codes for non-conformances to classify incidents by severity level. For more information, see [Configure severity codes](#).

## UI/UX changes

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

- The following pages have been added:
  - NC Severity Codes
  - NC Follow Up Actions
- The **CAPA** field has been added to the **NC Category** page.
- The **Origin Location Code**, **Category Code**, **Source Type**, and **Source No.** fields have been added to the **General** FastTab of the **Customer Non-Conformance**, **Internal Non-Conformance**, and **Vendor Non-Conformance** pages.



## Non Conformances

- The **Date of Purchase** field has been added to the **Customer Non-Conformance** page.
- The **Severity Code** field has been added to the **Customer Non-Conformance**, **Internal Non-Conformance**, and **Vendor Non-Conformance** pages.
- The **NC Line Comment** field has been added to the **Non-Conformance** page.
- The **Action Type** field has been added to the **Non-Conformance Actions** page.
- The **Date of Purchase** field has been added to the **Customer Non-Conformance** page.



# 2504.1.0.0

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

## Enhancements/Modifications

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

## Resolved issues

The following issues have been resolved in this release.

| ID     | Description                                                                                                                                                                                                                                                                                                                                                                                                   |
|--------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 300694 | The system fails to open the <b>Lot No. Information Card</b> page when selecting the <b>Lot No.</b> field value in the non-conformance lines on the <b>Customer Non-Conformance</b> , <b>Vendor Non-Conformance</b> , and <b>Internal Non-Conformance</b> pages.                                                                                                                                              |
| 337350 | The system incorrectly displays the layout for non-conformance line details on the <b>Closed Vendor Non-Conformance</b> , <b>Closed Customer Non-Conformance</b> , and <b>Closed Internal Non-Conformance</b> pages, resulting in missing or improperly formatted information. Additionally, the system fails to display all non-conformance documents correctly on the <b>Lot No. Information Card</b> page. |



# 2504.0.0.0

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

## Features

With the features added in this release of the Aptean Non Conformances extension, you can:

- Create and link claims directly from non-conformance records for improved traceability and streamlined issue resolution. For more information, see [Customer Non-Conformance](#).
- Create a sales credit memo, sales order, or sales claim directly from the **Customer Non-Conformance** page. For more information, see [Customer Non-Conformance](#).
- Create a purchase credit memo, purchase return order, or purchase claim directly from the **Vendor Non-Conformance** page. For more information, see [Vendor Non-Conformances](#).
- Track the severity and comments on the **Customer Non-Conformance** and **Vendor Non-Conformance** pages for better traceability, reporting, and management of non-conformance issues.
- Track the purchase date on the **Vendor Non-Conformance** page.

## UI/UX changes

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

- The **Select - Non-Conformance Severity Code** page has been added.
- The following actions have been added to the **Vendor Non-Conformance** page.
  - Create Purchase Credit Memo
  - Create Purchase Return Order
  - Create Purchase Claim
- The following actions have been added to the **Customer Non-Conformance** page.
  - Create Sales Credit Memo
  - Create Sales Order
  - Create Sales Claim
- The **Create Sales Claim** action has been added to the **Customer Non-Conformance** page.
- The **Create Purchase Claim** action has been added to the **Vendor Non-Conformance** page.
- The **Location Code** field has been added to the **Customer Non-Conformance** page.
- The following fields have been added to the **Customer Non-Conformance** and **Closed Customer Non-Conformance** pages.



## Non Conformances

- Severity Code
  - Comment
  - Date of Purchase
- The following fields have been added to the **Vendor Non-Conformance** and **Closed Vendor Non-Conformances** pages.
    - Severity Code
    - Comment



# 2503.2.0.0

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

## Resolved issues

The following issue has been resolved in this release.

| ID             | Description                                                                                                                                                                                                                                                                                    |
|----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 326037, 334238 | The system fails to update the values selected in the <b>Category</b> field on the <b>Customer Non-Conformance</b> , <b>Vendor Non-Conformance</b> , and <b>Internal Non-Conformance</b> pages when selecting a non-conformance category on the <b>Select - Non-Conformance Category</b> page. |



# 2503.1.0.0

Release Note • 9/24/2025 • 1 min read

## Resolved issues

The following issue has been resolved in this release.

| ID     | Description                                                                                                                                                                                                                                                                                                                                                           |
|--------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 321462 | The system fails to populate the <b>Lot No.</b> field value when executing the <b>Get Posted Documents to Reverse</b> action on the <b>Vendor Non-Conformance</b> page. This issue occurs when the <b>Document Type Filter</b> field value is set to <i>Posted Invoice</i> or <i>Posted Credit Memo</i> on the associated <b>Posted Purchase Document Lines</b> page. |



# 2503.0.0.0

Release Note • 8/27/2025 • 2 min read

## Features

With the features added in this release of the Aptean Non Conformances extension, you can:

- Create and link quality control checks directly from non-conformance documents to streamline quality management workflows. To know more, see [Manage e-signatures](#).
- Manage corrective and preventive processes with FactBoxes and visual deadline indicators. You can also view comprehensive quality control information, like linked records, open days, and updated tracking on the **Additional Information** FactBox. To know more, see [View comment information on the FactBox](#).

## Enhancements/Modifications

With this release of the Aptean Non Conformances extension, the **Food Safety Issue** toggle has been renamed to **Product Safety Issue** on the **Customer Non-Conformances**, **Vendor Non-Conformances**, and **Internal Non-Conformances** page, ensuring consistency and improving the overall user experience.

## Integrations

The Aptean Non Conformances extension has been integrated with the following extensions.

- Aptean [eSignature](#)
- Aptean [Quality Control](#)

## UI/UX Changes

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

- The following actions have been added to the **Customer Non-Conformance**, **Vendor Non-Conformance**, and **Internal Non-Conformance** pages.
  - Create Quality Control Check
  - Link Quality Control Check
  - Open Quality Control Check
  - Open Posted Quality Control Check



- The following actions have been added to the **Quality Control Check** page.
  - Create Customer Non-Conformance Documents
  - Create Vendor Non-Conformance Documents
  - Create Internal Non-Conformance Documents
- The **Create Quality Control Check** and **Link Quality Control Check** actions have been added to the following pages.
  - Customer Non-Conformance Documents
  - Vendor Non-Conformance Documents
  - Internal Non-Conformance Documents
- The **Create Quality Control Check** action has been added to the **Lines** FastTab on the following pages.
  - Customer Non-Conformance Documents
  - Vendor Non-Conformance Documents
  - Internal Non-Conformance Documents
- The **CAPA Actions** FactBox has been added to the following pages.
  - Customer Non-Conformance
  - Vendor Non-Conformance
  - Internal Non-Conformance
- The **Quality Control Checks** FactBox has been added to the **Internal Non-Conformance** page.
- The **Additional Information** FactBox has been added to the following pages:
  - Customer Non-Conformance
  - Vendor Non-Conformance
  - Internal Non-Conformance
- The **CAPA** checkbox has been added to the **Non-Conformance Categories** page.
- The **Food Safety Issue** toggle has been renamed to **Product Safety Issue** on the following pages.
  - Customer Non-Conformance
  - Vendor Non-Conformance
  - Internal Non-Conformance



# 2502.3.0.0

Release Note • 8/27/2025 • 1 min read

## Resolved issues

The following issues have been resolved in this release.

| ID     | Description                                                                                                                                                                                                                                                                                            |
|--------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 314408 | The system fails to update the <b>Lot No.</b> field value on the <b>Non-Conformance Lines</b> FastTab of the <b>Customer Non-Conformance</b> page. The issue occurs when the <b>Document Type Filter</b> field value is set to <i>Posted Cr. Memos</i> on the <b>Posted Sales Document Lines</b> page. |
| 312091 | The system fails to update the <b>Lot No.</b> field value on the <b>Non-Conformance Lines</b> FastTab of the <b>Customer Non-Conformance</b> page. The issue occurs when the <b>Document Type Filter</b> field value is set to <i>Posted Invoices</i> on the <b>Posted Sales Document Lines</b> page.  |
| 317783 | An error occurs when executing the <b>Change Status</b> action on the <b>Customer Non-Conformance</b> page.                                                                                                                                                                                            |



# 2502.2.0.0

Release Note • 7/30/2025 • 1 min read

## Enhancements/Modifications

With this release of the Aptean Non Conformances extension, the old *GetNewAccessTokenByAuthorizationCode* procedure has been removed to ensure compatibility with Business Central, version 27.



# 2502.1.0.0

Release Note • 7/30/2025 • 1 min read

## Enhancements/Modifications

With this release of the Aptean Non Conformances extension, the *NoSeriesManagement* codeunit has been replaced with the standard *No. Series* codeunit in the *NCHeaderFDW* table and the *AccessToken* variable has been changed from *SecretText* to *Text* to ensure compatibility with Business Central, version 27.

## Resolved issues

The following issue has been resolved in this release.

| ID     | Description                                                                                                                                                                                                                    |
|--------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 301039 | The system fails to display a space between the message text and the channel name in the notification on Microsoft Teams when a new channel is created under the Teams ID configured on the <b>Non-Conformance Setup</b> page. |



# 2502.0.0.0

Release Note • 6/4/2025 • 1 min read

## Features

With the features added in this release of the Aptean Non Conformances extension, the system displays notifications on Microsoft Teams when the **Change Status** action is executed on the **Customer Non-Conformance**, **Vendor Non-Conformance**, and **Internal Non-Conformances** pages. For more information, see [Customer Non Conformance](#), [Vendor Non-Conformances](#), and [Internal Non-Conformances](#).



# 2501.3.0.0

Release Note • 5/27/2025 • 1 min read

## Enhancements/Modifications

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



# 2501.2.0.0

Release Note • 4/28/2025 • 1 min read

## Enhancements/Modifications

The translation file for the French (fr-FR) language has been updated with standard texts for better readability.



# 2501.1.0.0

Release Note • 3/12/2025 • 1 min read

## Enhancements/Modifications

With this release of the Aptean Non Conformances extension, you can enter the user principal name in the **Non-Conformance User ID** field on the **User Setup** page. The system validates this value when processing the non-conformance records. If the field is empty, the system considers the email ID in the **E-mail** field on the **User Setup** page. This enhancement addresses the issue reported in bug ID #272124.

## UI/UX changes

The **Non-Conformance User ID** field has been added on the **User Setup** page.

## Resolved issues

The following issue has been resolved in this release.

| ID     | Description                                                                                                                                                                                                                        |
|--------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 272124 | An error occurs when changing the status to <i>In Progress</i> on the <b>Internal Non-Conformance</b> page if the <b>E-Mail</b> field value contains an email ID instead of the user principal name on the <b>User Setup</b> page. |



# 2501.0.0.0

Release Note • 2/25/2025 • 1 min read

## Features

With this release of the Aptean Non-Conformances extension, you can define the **County** field value on the **Customer Non-Conformance** and **Vendor Non-Conformance** pages to capture state, province, or county details, ensuring improved address accuracy.

## Enhancements/Modifications

The posted document mapping on the **Vendor Non-Conformance** page retrieves the **Direct Unit Cost** field value from purchase documents, replacing the previously mapped **Unit Price** field value. This update ensures more accurate cost representation.

## UI/UX changes

- The **County** field has been added to the **Customer Information** FastTab on the **Customer Non-Conformance** page and the **Vendor Information** FastTab on the **Vendor Non-Conformance** page.
- The **Unit Price** field has been renamed to **Direct Unit Cost** field on the **Vendor Non-Conformance** page.

## Resolved issues

The following issue has been resolved in this release.

| ID     | Description                                                                                                                                                                                                                                                                                             |
|--------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 258814 | The system fails to execute the <b>Get Posted Lines to Reverse</b> action on the <b>Vendor Non-Conformance</b> page, causing the <b>Unit Price</b> field value to remain blank on the lines of the <b>Non-Conformance</b> page, even though the original posted purchase invoice contains a unit price. |



# 2401.5.0.0

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

## Enhancements/Modifications

The *Power BI Report Spinner Part* object has been removed from the *NonConformancesRoleCenterFDW* page to ensure compatibility with Business Central, version 26.



# 2401.4.0.0

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

## Enhancements/Modifications

The *Power BI Report Spinner Part* object is obsolete and has been replaced with *Power BI Embedded Report Part* on the *NonConformancesRoleCenterFDW* page to ensure compatibility with Business Central, version 26.



# 2401.3.0.0

Release Note • 10/7/2024 • 1 min read

## Resolved issues

The following issue has been resolved in this release.

| ID     | Description                                                                                                                                                                                                                                                                                                                  |
|--------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 236031 | The system displays an incorrect label for the <b>Non-Conformance Line Amount</b> field in Dutch. Additionally, the system displays incorrect tooltips in Dutch for the <i>Invoice Discount %</i> , <i>Line Discount Amount</i> , and <i>Non-Conformance Line Amount</i> fields on the <b>Customer Non-Conformance</b> page. |



# 2401.2.0.0

Release Note • 8/13/2024 • 1 min read

## Enhancements/Modifications

With this release of the Aptean Non Conformances extension, modifications are made to accommodate the following changes:

- Enhanced application interaction: Procedures have been added to enhance the application interaction, improve upgrade tag management, streamline upgrade and installation processes, and provide additional flexibility by managing upgrades on a per-company and per-database basis.
- Application area refresh: Updates have been implemented to improve the application area refresh process by integrating a new procedure into the *Enable* codeunit.
- Improved management of install and upgrade code: The *Install* and *Upgrade* codeunits have been updated to streamline the handling of installation, reinstallation, and upgrade processes, ensuring smoother transitions and minimizing disruptions during these operations.
- Centralized license management procedures: The existing license management codeunit has been modified to use centralized license management procedures, further reducing the need for application-specific adjustments.
- Enhancements have been made to update the process within the application to handle the *User Group* and *User Group Permission Set* tables. This change ensures compatibility with current and future versions of Business Central, even when the *User Group* and *User Group Permission Set* tables are deprecated.

### ! Note

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



# 2401.1.0.0

Release Note • 6/19/2024 • 1 min read

## Resolved issues

The following issue has been resolved in this release.

| ID     | Description                                                                                                                                                                                                                           |
|--------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 214046 | Upon installing the Aptean Non-Conformances extension, an error message appears when opening attachments from the posted purchase invoice, posted sales invoice, posted purchase credit memo, and posted sales credit memo documents. |



# 2401.0.0.0

Release Note • 5/29/2024 • 1 min read

## Features

With this release of the Aptean Non-Conformances extension, you can view attachments on the following pages:

- Customer Non-Conformances list
- Customer Non-Conformance card
- Closed Customer Non-Conformances list
- Closed Customer Non-Conformance card
- Vendor Non-Conformances list
- Vendor Non-Conformance card
- Closed Vendor Non-Conformances list
- Closed Vendor Non-Conformance card
- Internal Non-Conformances list
- Internal Non-Conformance card
- Closed Internal Non-Conformances list
- Closed Internal Non-Conformance card

## UI/UX changes

The **Attachments** tab is added to the FacBox pane of the following pages:

- Customer Non-Conformances list
- Customer Non-Conformance card
- Closed Customer Non-Conformances list
- Closed Customer Non-Conformance card
- Vendor Non-Conformances list
- Vendor Non-Conformance card
- Closed Vendor Non-Conformances list
- Closed Vendor Non-Conformance card
- Internal Non-Conformances list
- Internal Non-Conformance card
- Closed Internal Non-Conformances list



Non Conformances

- Closed Internal Non-Conformance card



# 2301.3.0.0

Release Note • 4/30/2024 • 1 min read

## Resolved issues

The following issue has been resolved in this release:

| ID     | Description                                                                                        |
|--------|----------------------------------------------------------------------------------------------------|
| 195903 | The Dutch translation files have been enhanced and updated from .Xliff to .XLF format for clarity. |



# 2301.2.0.0

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

## Resolved issues

The following issue has been fixed in this release:

| ID     | Description                                                                                                                                                                               |
|--------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 156197 | An error occurs when opening a Microsoft Teams channel, specifically created for the customer or vendor whose name ends with a period, preventing access to the linked SharePoint folder. |



# 2301.1.0.0

Release Note • 11/1/2023 • 1 min read

## Enhancements/Modifications

Modifications were made to enhance the automation API for internal and external use, streamline pipelines, improve data classification, and enhance permissions for NCF setup via the Automation API.



# 1.10.115183.0

Release Note • 9/1/2023 • 1 min read

## Enhancements/Modifications

The translation file for the Swedish language code (sv-SE) has been updated to provide precise translations for field labels, tooltips, and other interface elements, resulting in improved accuracy and an enhanced user experience.



# 1.10.80266.0

Release Note • 4/6/2023 • 1 min read

## Features

With this release of the Aptean Non Conformances extension, you can access the following cues and navigation menus from the Role Center page for the Business Manager and Sales Order Processor roles:

| Cue                            |
|--------------------------------|
| Non-Conformances               |
| Open Vendor Non-Conformances   |
| Open Internal Non-Conformances |
| Open Follow Up Actions         |
| Open Customer Non-Conformances |

| Navigation menu                  |
|----------------------------------|
| Non-Conformances                 |
| Vendor Non-Conformances          |
| Internal Non-Conformances        |
| Closed Non-Conformances          |
| Closed Vendor Non-Conformances   |
| Closed Internal Non-Conformances |
| Customer Non-Conformances        |
| Closed Customer Non-Conformances |



# 1.9.68274.0

Release Note • 4/6/2023 • 1 min read

## Resolved issues

The following issue has been fixed in this release:

| ID    | Description                                                                                                    |
|-------|----------------------------------------------------------------------------------------------------------------|
| 78077 | The <b>Non-conformance No.</b> field is missing on the <b>Your Open Follow Up Actions</b> data cues list page. |



# 1.8.48754.0

Release Note • 4/6/2023 • 1 min read

## Enhancements/Modifications

The enhancements in this release are listed below:

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



# Introduction

Article • 5/27/2025 • 1 min read

The Aptean Non Conformances (NCF) extension enables you to receive, document, categorize, follow up, and process customer non-conformances.

Non-Conformances can be linked to Customers and also to Consumers, which don't need to be set up in Microsoft Dynamics 365 Business Central. You can conveniently record non conformances directly from Microsoft Outlook and effortlessly transform an incoming email into a non-conformance. Subsequently, your team members are promptly notified via Teams and are delegated tasks in a designated SharePoint folder. This facilitates the prompt resolution of any customer concerns, ensuring that top-notch customer service is provided.

In addition to utilizing original source documents, non-related data can also be incorporated as comments on non-conformance lines, making the process incredibly versatile.

The non-conformance reference can be added to several sales documents to explain why a specific sales document was created. It also tracks if the non-conformance follow-up is done properly.



# Setup

Article • 12/27/2024 • 1 min read

The following setups are required.

- [Manage permission sets](#)
- [Set up non-conformance](#)



# 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 *NONCONFORMANCESFDW*.

## 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 *NONCONFBASICFDW*.

## 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.



## Non Conformances

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



# Set up non-conformance

Article • 9/29/2025 • 8 min read

When you configure non-conformance settings, you can specify the non-conformance number series and add communication methods for the Outlook add-in (email) and the API. If you define these communication methods, they are automatically populated in the non-conformance when it is received via Outlook (e-mail) or the API.

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

| Field                                 | Description                                                                                                                                                                           |
|---------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Customer Non-Conformance Nos.         | Select a number series from the list for customer non-conformances.                                                                                                                   |
| Vendor Non-Conformance Nos.           | Select a number series from the list for vendor non-conformances.                                                                                                                     |
| Internal Non-Conformance Nos.         | Select a number series for internal non-conformances. You can also select a contact person who reported the issue and the company contact number to identify the appropriate contact. |
| Contact No. Internal Non-Conformances | Select the contact number used for registering internal non-conformances.                                                                                                             |
| Communication Method Email            | Select the communication method used when non-conformances are created automatically from the Outlook add-in.                                                                         |
| Communication Method API              | Select the communication method used when non-conformances are created automatically via the API.                                                                                     |

The non-conformance number series and communication methods for Outlook (e-mail) and the API are set up.

3. On the **Microsoft Teams** FastTab, enter the required information in the following fields to configure Microsoft Teams and create tasks in Microsoft Planner.

| Field                 | Description                                                                                                                                                                                                                                                                                                                       |
|-----------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Teams Synchronization | Turn on this toggle to enable Microsoft Teams integration for non-conformances. You must create a group in Teams for customer, vendor, and internal non-conformances. You can retrieve the Group ID and Tenant ID in Microsoft Teams. For more information about retrieving the IDs, see <a href="#">Group ID and Tenant ID</a> . |
| Group Id Customer     | Enter the Microsoft Teams Group ID for customer non-conformances.                                                                                                                                                                                                                                                                 |



|                   |                                                                                                                                                                       |
|-------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Group Id Vendor   | Enter the Microsoft Teams Group ID for vendor non-conformances.                                                                                                       |
| Group Id Internal | Enter the Microsoft Teams Group ID for internal non-conformances.                                                                                                     |
| Tenant Id         | Enter the name or ID of your tenant.                                                                                                                                  |
| Client Id         | Enter the registered application's Client ID from Microsoft Azure.                                                                                                    |
| Client Secret     | Enter the the value of a created (API access) Key in your Registrered App associated with the Azure application.                                                      |
| Reply Url         | Enter the Reply URL configured in Azure. This is the endpoint where Azure AD sends the authentication response, including the token, after successful authentication. |

4. On the **Report** FastTab, in the **Report ID** field, select an ID to specify which report to use when printing a non-conformance.

When you choose **Reports > Print** action on the **Customer Non-Conformances**, **Vendor Non-Conformances**, or **Internal Non-Conformances** page, the system uses the report ID selected in this field to generate the printout.

#### Note

There is no default or preassigned report ID for printing non-conformances. However, you can create a custom report as a PTE, link it to this field, and print it.

## Authenticate/Re-Authenticate

The Teams synchronization is used to synchronize Non-Conformances with the Teams app and the Planner app by using the permissions and tokens created in the authentication process.

When the synchronization is not executed for a long time, it expires. After expiration, it is necessary to use the function (re)authenticate to synchronize.

1. On the **Non-Conformance Setup** page, on the action bar, select **New > (Re-) Authenticate**.
2. On the Login screen, enter the credentials for the (delegated) admin account with permissions to authenticate. Next, grant permissions to enable user authentication to Microsoft Graph using the OAuth token generated during this authentication procedure.
3. After a successful login, accept the necessary permissions shown in the permission requests screen:



The Teams synchronization is enabled for the company and its users.



## Group ID and Tenant ID in Microsoft Teams

The group and tenant IDs are necessary to determine in which team the follow-up actions must be synchronized.

1. Select the team in which the follow-up actions are to be synchronized.
2. Click **More options** > **Get link to team**.



The tenant ID is shown in the link.



You can copy the ID and paste this in the non-conformance setup.

The group ID is shown in the link.



You can copy the ID and paste this in the non-conformance setup.

### Important

Only put the ID in the setup field and not the complete URL.

For each non-conformance type (customer, vendor and internal), a different group can be created in Microsoft Teams by creating separate teams per type and setup the group ID for each individual team.



# Non-Conformance Communication Methods

Article • 4/6/2023 • 2 min read

Non-conformance communication methods are used to register the way non-conformances are received or sent. In the non-conformance setup, you can select a communication method for mail and API. However, before they can be used, communication methods need to be set up.

1. Select the Search icon  , enter **Non-Conformance Communication Methods**, and then choose the related link.  
The **Non-Conformance Communication Methods** list page opens.
2. On the action bar, select **New**.
3. In the **Code** field, enter the value.
4. In the **Description** field, enter the explanatory text.

The non-conformance communication method is now set up.



# Non Conformance Categories

Article • 4/6/2023 • 2 min read

Non-conformance categories and subcategories are used to categorize a non-conformance. Unlimited non-conformance categories and subcategories can be created.

Examples of categories are:

- Product Quality
- Product Safety
- Packaging

Examples of subcategories for Product Quality are:

- Smell
- Taste
- Color

The non-conformance category can be linked in a non-conformance with or without a non-conformance subcategory.

1. Select the Search icon , enter **Non-Conformance Categories**, and then choose the related link.

The **Non-Conformance Categories** page opens.

2. On the action bar, select **New** to create a new entry.

3. In the **Code** field, enter the value.

4. In the **Description** field, enter an explanatory text.

A non-conformance category is now created.

Add a non-conformance subcategory to the non-conformance category. But, it is not mandatory to add subcategories to a category.

5. On the **Subcategories** FastTab, in the **Code** field, enter the value.

6. In the **Description** field, enter an explanatory text.

7. Click the Back button.

A non-conformance category with non-conformance subcategories is now set up.



# Non Conformance Reasons

Article • 4/6/2023 • 2 min read

Non-conformance reasons and subreasons are used to categorize the non-conformance after investigation from the perspective of quality assurance. Unlimited non-conformance reasons and subreasons can be created.

Examples of reasons are:

- Human Failure
- Machine Failure

Examples of subreasons for Machine Failure are:

- Machine failure
- Not correct machine setup
- Lack of maintenance

The non-conformance reason can be linked in a non-conformance with or without a non-conformance subreason.

1. Select the Search icon , enter **Non-Conformance Reasons**, and then choose the related link.

The **Non-Conformance Reasons** page opens.

2. On the action bar, select **New** to create a new entry.

3. In the **Code** field, enter the value.

4. In the **Description** field, enter an explanatory text.

A non-conformance reason is now created.

Add a Non-Conformance Subreason to a Non-Conformance Reason. But, it is not mandatory to add Subreasons to a Reason.

5. On the **Subreasons** FastTab, in the **Code** field, enter the value.

6. In the **Description** field, enter an explanatory text.

7. Click the Back button.

A non-conformance reason with linked non-conformance subreasons is now set up.



# Customer Non-Conformance

Article • 2/10/2026 • 10 min read

Customer non-conformances enable you to register a non-conformance for a customer or a consumer. Specifying the item(s) to which the non-conformances relate, can be done by manually entering the items on the non-conformance lines. It is also possible to retrieve the items (incl. quantities, prices, etc.) from a source document.

## Customer Non-Conformance with Line Manually Added

The following instruction describes how to create a customer non-conformance for a known customer and by entering the non-conformances lines manually.

1. Select the Search icon , enter **Customer Non-Conformances**, and then choose the related link.  
The **Customer Non-Conformances** page opens.
2. On the action bar, select **New** to create a new entry.
3. On the **General** FastTab, in the **Communication Method** field, select a code from the list.
4. In the **Category** field, select the category to which the non-conformance belongs according to the customer's information.  
When needed, a subcategory can be linked.
5. In the **Subcategory** field, select a more detailed level of Category to which the non-conformance belongs.
6. Turn on the **Food Safety Issue** toggle, if the non-conformance is a risk to public health. This can be used for reporting purposes.
7. In the **Related Non-Conformance No.** field, click the AssistEdit button to select a No. from the list.
8. If a non-conformance is created as a result of (or in relation to) another non-conformance, select a Related Non-Conformance from the **Non-Conformance** page and click **OK**.
9. On the **Comment** FastTab, in the **Comment** field, enter a comment. In this text area, the actual non-conformance can be described.
10. In the **Root Cause Description** field, enter a comment. In this text area, the actual root cause of the non-conformance can be described.
11. On the **Customer Information** FastTab, in the **Source No** field, select the customer number who communicated the non-conformance.
12. In the **County** field, enter the state, province, or county details.
13. On the **Non-Conformance Lines** FastTab, in the **Item No.** field, select the item to which the non-conformance applies.
14. In the **Quantity** field, enter the quantity.  
The last step is to change the status of the non-conformance from *Open* to *In Progress*.

15. On the action bar, select **Change Status**.

A dialog box appears with the status-options: *Open*, *In Progress*, and *Closed*.

16. Select the new status, *In Progress* and click **OK**.

On the **Non-Conformance Setup** page, if the **Teams Synchronization** toggle is turned on and there are follow up actions, the Teams URL is filled after changing the status.

17. In the **Severity Code** field, select the severity of the non-conformance to indicate whether it is minor, major, or critical.

18. In the **Comment** field, enter any additional notes or observations about the non-conformance for better context and tracking.

### Note

When the **Status** field value is set to *In Progress*, the system displays notifications on Microsoft Teams when the **Change Status** action is executed.

## Customer Non-Conformance via Get Posted Document To Reverse

This functionality enables the creation of non-conformances based on posted sales documents. All the relevant data is copied from the source document line to the non-conformance line and can be modified if needed.

1. On the **Customer Non-Conformance** card page, on the action bar, select **Get Posted Document To Reverse**. The **Posted Sales Document Lines** window opens.

2. In the **Document Type Filter** field, select a document.

Now the non-conformance lines are filled with the data from the source document. Also source document, source document no. and source document line no. are added to the non-conformance line.

The last step is to change the status of the non-conformance from *Open* to **In Progress**.

3. On the action bar, select **Change Status**.

A dialog box appears with the status-options: *Open*, *In Progress*, and *Closed*.

4. Select the new status, **In Progress** and click **OK**.

### Note

The **Location Code** field value is inherited from the source document when the **Get Posted Document Lines to Reverse** action is executed. This field is non-editable, and the inherited value automatically flows to the documents created from the **Non-Conformance** page. When you create non-conformance lines manually, the **Location Code** field is editable and provides a listing all locations except the *In-Transit* location.



## Customer Non-Conformance from Consumer

You can make non-conformances without having a customer registered in Dynamics 365 Business Central. It is even possible to register a non-conformance from a consumer and register the data from a consumer that is needed to properly follow up the non-conformance.

It is not needed to add a specific item to the non-conformance, as you can add a free description on the non-conformance line.

1. Select the Search icon , enter **Customer Non-Conformances**, and then choose the related link.  
The **Customer Non-Conformances** page opens.
2. On the action bar, select **New** to create a new entry.
3. On the **General** FastTab, fill in the necessary fields.
4. On the **Comment** FastTab, in the **Comment** field, enter a comment. In this text area, the actual non-conformance can be described.
5. In the **Root Cause Description** field, enter a comment. In this text area, the actual root cause of the non-conformance can be described.
6. On the **Consumer Information** FastTab, turn on the **Consumer Non-Conformance** toggle.
7. Fill in the remaining fields.
8. On the **Non-Conformance Lines** FastTab, in the **Description** field, enter the text.
9. In the **Quantity** field, enter the value.
10. In the **Unit Price** field, enter the price.  
The last step is to change the status of the non-conformance from *Open* to **In Progress**.
11. On the action bar, select **Change Status**.  
A dialog box appears with the status-options: *Open*, *In Progress*, and *Closed*.
12. Select the new status, *In Progress* and click **OK**.
13. Click the Back button.

When you execute **Create Purchase Credit Memo**, **Create Purchase Return Order**, or **Create Purchase Claim** action, the system creates the corresponding document for the lines you've selected. For example, when you execute the **Create Purchase Claim** action, the system not only creates the claim but also automatically links it to the selected non-conformance.

### Note

The **Create Purchase Claim** action is available only when the Aptean [Claims](#) extension is installed.



## Create non-conformances with CAPA category

To create a non-conformance with a CAPA category, follow these steps:

1. Select the Search icon , enter **Non-Conformances**, and then choose the related link.  
The **Non-Conformances** page opens.
2. Open the non-conformance record for which you want to create follow-up actions.
3. Select **New** to create a new non-conformance record. The appropriate non-conformance page opens based on the source type (**Customer Non-Conformance**, **Internal Non-Conformance**, or **Vendor Non-Conformance**).
4. On the **General** FastTab, in the **Category Code** field, select a category that has the **CAPA** checkbox selected.
5. In the **Source Type** field, select the source type (Customer, Internal, or Vendor).
6. In the **Source No.** field, enter or select the source number.
7. For customer non-conformances, in the **Date of Purchase** field, enter the date when the items were purchased by the consumer.
8. In the **Origin Location Code** field, select the location where the non-conformance occurred or is related to.
9. Fill in additional standard fields as needed, such as **Description**, **Item No.**, **Lot No.**, and other relevant information.

## Use CAPA categories

All non-conformance pages support the use of CAPA categories. When creating non-conformances with a category that has the **CAPA** checkbox selected, you can leverage enhanced tracking and management capabilities.

For detailed procedures on creating non-conformances with CAPA categories, configuring severity codes, creating follow-up actions with action types, and adding purchase dates and origin locations, refer to the respective sections in this documentation.

## Add severity codes and line comments

To add a severity code to a non-conformance, follow these steps:

1. Open the **Customer Non-Conformance** page.
2. Select the non-conformance record for which you want to create follow-up actions.
3. In the **Severity Code** field, select the appropriate severity level.



 **Note**

Severity codes can be configured on the **Non-Conformance Severity Code** page.

To add comments to non-conformance lines, follow these steps:

4. On the **Customer Non-Conformance** page, navigate to the **Non-Conformances Lines** FastTab.
5. Select the line to which you want to add a comment.
6. In the **Comment** field, enter general text information relating to the line.

## Add purchase dates and origin locations

To add a date of purchase to a customer non-conformance, follow these steps:

1. Open the **Customer Non-Conformance** page.
2. In the **Date of Purchase** field, enter the date when the items were purchased by the consumer.

To add an origin location code to a non-conformance, follow these steps:

3. Open the non-conformance page (**Customer Non-Conformance**, **Internal Non-Conformance**, or **Vendor Non-Conformance**).
4. In the **Origin Location Code** field, select the location where the non-conformance occurred or is related to.



# Vendor Non-Conformances

Article • 10/22/2025 • 5 min read

You can create a non-conformance for a vendor. In the non-conformance line, items, quantities, and prices can be retrieved from a posted purchase document or entered manually. There is also the option to enter the item description manually on the non-conformance line.

If a vendor non-conformance is created, you can create a report that can be sent to the vendor.

## Vendor Non-Conformance with Line Manually Added

The following instruction describes how to create a vendor non-conformance for a known vendor and by entering the non-conformance lines manually.

1. Select the Search icon , enter **Vendor Non-Conformances**, and then choose the related link.  
The **Vendor Non-Conformances** page opens.
  2. On the action bar, select **New** to create a new entry.
  3. On the **General** FastTab, in the **Communication Method** field, select a code from the list.
  4. In the **Category** field, select the category to which the non-conformance belongs according to the customer's information.  
When needed, a subcategory can be linked.
  5. In the **Subcategory** field, select a more detailed level of Category to which the non-conformance belongs.
  6. Turn on the **Food Safety Issue** toggle if the non-conformance is a risk to public health. This can be used for reporting purposes.
  7. In the **Related Non-Conformance No.** field, click the AssistEdit button to select a No. from the list.
  8. If a non-conformance is created as a result of (or in relation to) another non-conformance, select a Related Non-Conformance from the **Non-Conformance** page and click **OK**.
  9. On the **Comment** FastTab, in the **Comment** field, enter a comment. In this text area, the actual non-conformance can be described.
  10. In the **Root Cause Description** field, enter a comment. In this text area, the actual root cause of the non-conformance can be described.
  11. On the **Vendor Information** FastTab, in the **Source No** field, select the vendor number who communicated the non-conformance.
  12. On the **Customer Information** FastTab, in the **County** field, enter the state, province, or county details.
  13. On the **Non-Conformance Lines** FastTab, in the **Item No.** field, select the item to which the non-conformance applies.
  14. In the **Quantity** field, enter the quantity.
- The last step is to change the status of the non-conformance from *Open* to *In Progress*.

15. On the action bar, select **Change Status**.

A dialog box appears with the status-options: *Open*, *In Progress*, and *Closed*.

16. Select the new status, *In Progress* and click **OK**.

On the **Non-Conformance Setup** page, if the **Teams Synchronization** toggle is turned on and there are follow up actions, the Teams URL is filled after changing the status.

### Note

When the **Status** field value is set to *In Progress*, the system displays notifications on Microsoft Teams when the **Change Status** action is executed.

17. In the **Severity** field, select the severity of the non-conformance to indicate whether it is minor, major, or critical.
18. In the **Comment** field, enter any additional notes or observations about the non-conformance for better context and tracking.
19. In the **Date of Purchase** field, enter the date when the product was originally purchased to help track warranty and lifecycle information.

## Vendor Non-Conformance via Get Posted Document To Reverse

This functionality enables the creation of non-conformances based on posted purchase documents. All the relevant data is copied from the source document line to the vendor non-conformance line and can be modified if needed.

1. On the **Vendor Non-Conformance** card page, on the action bar, select **Get Posted Document To Reverse**.  
The **Posted Purchase Document Lines** window opens.
2. In the **Document Type Filter** field and select a document, e.g., "Posted Receipts".  
Now the non-conformance lines are filled with data from the source document. Also, source document, source document no. and source document line no. are added to the non-conformance line.  
The last step is to change the status of the non-conformance from *Open* to *In Progress*.
3. On the action bar, select **Change Status**.  
A dialog box appears with the status-options: *Open*, *In Progress*, and *Closed*.
4. Select the new status, *In Progress* and click **OK**.



# Internal Non-Conformances

Article • 6/4/2025 • 3 min read

If an employee reports a non-conformance, you can capture this as an internal non-conformance. In the internal non-conformance, there is the option to enter the item description manually on the non-conformance line.

1. Select the Search icon , enter **Internal Non-Conformances**, and then choose the related link.  
The **Internal Non-Conformances** page opens.
2. On the action bar, select **New** to create a new entry.
3. On the **General** FastTab, in the **Category** field, select the category to which the non-conformance belongs.
4. In the **Subcategory** field, select a more detailed level of Category to which the non-conformance belongs.
5. In the **Contact** field, select the name of the contact and click **OK**.  
The employee that reported the non-conformance can be linked to the internal non-conformance as a contact. The contacts from the company that is selected in the non-conformance setup are shown.
6. Turn on the **Food Safety Issue** toggle if the non-conformance is a risk to public health. This can be used for reporting purposes.
7. In the **Related Non-Conformance No.** field, click the AssistEdit button to select a No. from the list.
8. Select the non-conformance related to this non-conformance and click **OK** to close the **Non-Conformances** page.
9. On the **Comment** FastTab, in the **Comment** field, enter a comment. In this text area, the actual non-conformance can be described.
10. In the **Root Cause Description** field, enter a comment. In this text area, the actual root cause of the non-conformance can be described.
11. On the **Non-Conformance Lines** FastTab, in the **Item No.** field, select the item to which the non-conformance applies.
12. In the **Quantity** field, enter a value.
13. On the action bar, select **Change Status**. A dialog box appears with the status-options: *Open*, *In Progress*, and *Closed*.
14. Select the new status, **In Progress**, and click **OK**.

On the **Non-Conformance Setup** page, if **Teams Synchronization** toggle is turned on and there are follow up actions, the Teams URL will be filled after changing the status.

## Note

When the **Status** field value is set to *In Progress*, the system displays notifications on Microsoft Teams when the **Change Status** action is executed.



# Add Non-Conformance Reference to Documents

Article • 4/6/2023 • 1 min read

This functionality enables to add a non-conformance reference to several documents.

Supported documents are:

- Sales Return Order
- Sales Credit Memos
- Purchase Return Order
- Purchase Credit Memos
- Open a sales or purchase return order, or a sales or purchase credit memo.
- On the **Invoice Details** FastTab, in the **Non-Conformance No.** field, click the AssistEdit button.  
The **Non-Conformances** page opens.
- Select the non-conformance that needs to be linked to the document.
- Click **OK**.  
Customer non-conformances can be linked to sales documents, vendor non-conformance can be linked to purchase documents.

The non-conformance is now linked to the document.



# Add Non-Conformance Reason to a Non-Conformance

Article • 4/6/2023 • 2 min read

When a non-conformance is investigated and the cause is known, a non-conformance reason and subreason can be registered. The description below shows how to register a reason and subreason for a customer non-conformance.

1. Select the Search icon , enter **Customer Non-Conformances**, and then choose the related link.  
The **Customer Non-Conformances** list page opens.
2. Select the desired **No.**  
The **Customer Non-Conformance** page opens.
3. On the **General** FastTab, in the **Reason** field, select the code for the reason of non-conformance, as indicated by internal staff.  
When needed, a subreason can be registered.
4. In the **Subreason** field, select a more detailed level of the Reason.

The non-conformance reason and subreason are now linked to the customer non-conformance.



# Non Conformance Actions

Article • 4/6/2023 • 2 min read

This functionality enables to set up non-conformance actions which can be linked to non-conformance categories and subcategories.

Non-conformance actions are specific tasks that need to be executed in the follow up of a customer, vendor or internal non-conformance.

When Microsoft Dynamics 365 Business Central is synchronized with Microsoft Office 365 Planner integrated into Microsoft Office 365 Teams the actions will be shown as Tasks in Planner.

1. Select the Search icon , enter **Non-Conformance Actions**, and then choose the related link.  
The **Non-Conformance Actions** page opens.
2. On the action bar, select **New**.
3. In the **Code** field, enter the code.
4. In the **Description** field, enter an explanatory text.
5. Click the Back button to save and close the page.



# Non Conformance Category Actions

Article • 4/6/2023 • 3 min read

You can register default follow up actions per category, subcategory code and non-conformance type.

1. Select the Search icon  , enter **Non-Conformance Category Actions**, and then choose the related link.  
The **Non-Conformance Category Actions** page opens.
2. In the **Category Code** field, select the Non-conformance category code to which the action is linked.
3. In the **Subcategory Code** field, select a more detailed level of the Category Code.
4. In the **Action Code** field ,select the name or reference number of the action that will be generated when following up on the related non-conformances.
5. In the **Responsible** field, select the User ID of the person.  
This is the person that is responsible for carrying out the non-conformance action. If Microsoft Teams synchronization is available, this person gets a notification and will see the action in Microsoft Planner.
6. In the **Deadline** field, enter the value.  
This is the deadline for carrying out the non-conformance action. The deadline can be entered using date formulas such as 2w (2 weeks) or 3D (3 days).
7. Select the **Return Required** checkbox.  
If executing the follow-up action should involve creating a sales or purchase return order, then turn on the **Return Required** checkbox. If no sales or purchase return order is created when closing the non-conformance, a warning is shown.
8. Select the **Credit Memo Required** checkbox.  
If executing the follow-up action should involve creating a sales or purchase credit memo, then select the **Credit Memo Required** checkbox. If no sales or purchase credit memo is created when closing the non-conformance, a warning is shown.



# Create and track follow-up actions

Article • 2/2/2026 • 1 min read

To create follow-up actions for a non-conformance, follow these steps:

- 1. Open the **Non-Conformances** page.
- 2. Select the non-conformance record for which you want to create follow-up actions.
- 3. Select **Create NC Follow Up Actions** on the action bar.  
The **NC Follow Up Actions** page opens.
- 4. Select **New** to add a new action line.
- 5. Enter the required information in the following fields:

| Field                 | Description                                                                                                                                                                                                                                                                                                                      |
|-----------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| NC Source Type        | Specifies the source type of the action.                                                                                                                                                                                                                                                                                         |
| NC No.                | Specifies the non-conformance number.                                                                                                                                                                                                                                                                                            |
| NC Action             | Specifies the name or reference number of the action that should be taken when following up on the non-conformance.                                                                                                                                                                                                              |
| NC Action Type        | Specifies the type of action that should be taken when following up on the non-conformance. The available options are: <i>Corrective</i> : Actions that address the immediate problem and <i>Preventive</i> : Actions that prevent similar problems from occurring                                                               |
| NC Action Description | Specifies the description of the action that should be taken when following up on the non-conformance.                                                                                                                                                                                                                           |
| Responsible           | Specifies the person responsible for carrying out the non-conformance action.                                                                                                                                                                                                                                                    |
| Deadline              | Specifies the deadline for carrying out the non-conformance action.                                                                                                                                                                                                                                                              |
| Status                | Specifies the status of the non-conformance. Actions are initially created with status <i>New</i> , but can be manually changed to <i>In Progress</i> or <i>Closed</i> . In case, teams synchronization is set up on the <b>Non-Conformance Setup</b> page, the status <i>Synchronized with Teams</i> is assigned automatically. |
| Return Required       | Specifies if following up on the non-conformance should involve creating a sales return order.                                                                                                                                                                                                                                   |
| Credit Memo Required  | Specifies if following up on the non-conformance should involve a credit memo.                                                                                                                                                                                                                                                   |



# Configure severity codes

Article • 2/2/2026 • 2 min read

To configure severity codes, follow these steps:

1. Select the Search icon  , enter **NC Severity Codes**, and then choose the related link.  
The **NC Severity Codes** page opens.
2. Select **New**.
3. In the **Code** field, enter a unique code for the severity level.
4. In the **Description** field, enter a description of the severity level.



# Customer Non-Conformance via Outlook add-in

Article • 4/6/2023 • 3 min read

You can create a customer non-conformance from an e-mail received in Microsoft Office 365 Outlook.

The sender of the e-mail needs to be set up as a contact of a customer in Microsoft Dynamics 365 Business Central.

To create a non-conformance via Outlook, the Microsoft Dynamics 365 Business Central Outlook add-in is used, which can be set up via the assisted setup *Set up your Business Inbox in Outlook* in the company that needs to be connected. See Microsoft Docs for more information: [Using Dynamics 365 Business Central as your Business Inbox in Outlook](#).

1. Open Microsoft Office 365 Outlook.
2. Click received e-mail in Microsoft Office 365 Outlook.
3. Click **Business Central**. The customer is automatically recognized as the sender of the e-mail is linked as a contact to this customer.
4. On the action bar, select **New > Non-Conformance**.
5. In the **Category** field, click the AssistEdit button to select the desired code.
6. In the **Subcategory** field, click the AssistEdit button to select the desired code.  
By navigating through the customer non-conformance you can add or modify relevant data. The customer data is automatically inserted as the e-mail sender is recognized as a contact.
7. In the **Document No.** field, enter a value.
8. On the Non-Conformance Lines FastTab, fill in the necessary fields.
9. In the **Item No.**, select the desired **No.**
10. In the **Quantity** field, enter the value.
11. In the **Unit Price** field, enter the value.

The customer non-conformance is now added in Microsoft Dynamics 365 Business Central (with status **Open**) and can be looked up and further processed.

12. Select the Search icon , enter **Customer Non-Conformances**, and then choose the related link.  
The **Customer Non-Conformances** list page opens.
13. Select the desired **No.** from the list.  
The **Customer Non-Conformance** page opens.  
The document no. is the same as was added in the e-mail. Other data can be checked, modified or added. The customer non-conformance status can be set to **In Progress**.
14. On the action bar, select **Change Status**  
A dialog box appears with the status-options: *Open, In Progress, and Closed*.
15. Select the new status, **In Progress** and click **OK**.



# Follow up Non-Conformances in Microsoft Office 365 Planner integrated into Teams

Article • 4/6/2023 • 4 min read

You can plan and follow up on customer, vendor and internal non-conformance actions using the power of Microsoft Office 365 Planner.

This app uses Microsoft Office 365 Planner integrated into Microsoft Office 365 Teams and needs additional installation & setup. To get help with the installation please contact your local Aptean for Food & Beverage reseller.

See Microsoft Docs for more information:

- Microsoft Office 365 Planner: <https://docs.microsoft.com/en-us/graph/planner-concept-overview>
- Microsoft Office 365 Teams: <https://docs.microsoft.com/en-us/microsoftteams/teams-overview>

After installation of Office 365 Teams, the synchronization with Microsoft Office 365 Teams needs to be set up in Microsoft Dynamics 365 Business Central.

1. Select the Search icon , enter **Non-Conformance Setup**, and then choose the related link.
2. On the **Microsoft Teams** FastTab, fill in the **Group Id**, **Client Id**, **Client Secret** and **Reply Url** fields and turn on the **Teams Synchronization** toggle. To get help with the installation please contact your local Aptean for Food & Beverage reseller.
3. Click the Back button.

When the status of a non-conformance is changed from *Open* to *In Progress*, non-conformance actions will be created and synchronized with Microsoft Office 365 Planner integrated into Microsoft Office 365 Teams. It is important that you are also added as a team member to the specific team for non-conformances in Teams in addition being a user in Dynamics 365 Business Central. If you are not added to the team, an error message will be displayed after changing the status.

The description below shows synchronization with Teams for a customer non-conformance.

4. Open a Non-Conformance record that has status *Open*.
5. On the **Customer Non-Conformance** page, on the action bar, select **Change Status**.  
A dialog box appears with the status-options: *Open*, *In Progress*, and *Closed*.
6. Select the new status, *In Progress* and click **OK**.  
The non-conformance actions that were set up earlier for this type of non-conformance and specified category/subcategory are shown.  
You can add or adjust follow-up actions as desired.
7. Click **Close**.



On the **Non-Conformance Setup** page, if **Teams Synchronization** toggle is turned on and there are follow up actions, the Teams URL will be filled after changing the status.

Users that are set up as "**responsible**" for the created actions, will receive a notification of the action they need to execute.

## Microsoft Office 365 Teams

1. Go to Microsoft Office 365 Teams.

2. Select the link that matches the created Customer Non-Conformance.

The Microsoft Office 365 Planner app is automatically integrated to Microsoft Office 365 Teams. You can download the Office 365 Planner as an app on a device, such as a phone or tablet. You can see the tasks in the app.

The view needs to be changed to see the Microsoft Office 365 Planner Tasks.

3. On the action bar, select **Planner**.

This enables you to choose how to organize your task.

4. Select **Choose** how to organize your tasks.

5. Select **Group by Bucket > Bucket**.

See the generated Microsoft Office 365 Planner tasks. Now the tasks can be followed up.

See [Microsoft Docs](#) for more information about working with Microsoft Planner.



# Set Non-Conformance to Closed

Article • 10/22/2025 • 4 min read

When all non-conformance follow-up actions have been executed, the status of the non-conformance can be set to *closed*.

You can change the status of the follow-up actions and of the non-conformance itself. If the follow-up actions are synchronized with Microsoft Teams, the status in Dynamics 365 Business Central is *Synchronised with Teams* and the status of the non-conformance action can be tracked in Teams. If the follow-up actions are not synchronized with Teams, you can adjust the status of the follow-up actions on the Non-Conformance Actions page. When all follow-up actions have been completed, the non-conformance can be closed.

The description below shows how to close a customer non-conformance.

1. Select the Search icon , enter **Customer Non-Conformances**, and then choose the related link.  
The **Customer Non-Conformances** list page opens.
2. Select the desired **No**.

## Non-Conformance Actions

1. On the **Customer Non-Conformance** page, on the action bar, select **Create Follow Up Actions**.  
The **Non-Conformance Actions** page opens.
2. In the **Status** field, select an option. If the action is synchronized with Microsoft Teams, the status automatically changes to *Synchronised with Teams*.
3. Select **Close** to close the page.

## Non-conformance

1. On the **Customer Non-Conformance** page, on the action bar, select **Change Status**.  
The **Choose a new status** dialog box appears.
2. Select **Closed** and click **OK** to close the dialog box.

The status of the customer non-conformance changes to *Closed*.

## Closed Non-Conformances

1. Select the Search icon , enter **Closed Customer Non-Conformances**, and then choose the related link.  
The **Closed Customer Non-Conformances** page opens.



The **Closed Customer Non-Conformances** page shows the closed non-conformances. There is a page for closed customer, vendor and internal non-conformances.

When you execute **Create Purchase Credit Memo**, **Create Purchase Return Order**, or **Create Purchase Claim** action, the system creates the corresponding document for the lines you've selected. For example, when you execute the **Create Purchase Claim** action, the system not only creates the claim but also automatically links it to the selected non-conformance.



# Non Conformance shown in Lot No. Information List

Article • 4/6/2023 • 2 min read

You can see which non-conformances are linked to a specific lot in the Lot No. Information list.

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 desired **Lot No.**  
The **Lot No. Information Card** page.
3. On the action bar, select **Related > Lot No. > Non-Conformances**.

All non-conformances that are linked to this lot no. are shown. After selecting a non-conformance no., the non-conformance is shown.



# Manage eSignature

Article • 8/27/2024 • 1 min read

When the Aptean eSignature extension is installed, you can manage status change through an enhanced e-signature workflow.

To sign the document, follow these steps:

1. Navigate to the **Vendor Non-Conformance** page.
2. On the action bar, select **Change Status Mgmt Status**. The **Status Mgmt. Description** field is updated with the description of the selected code.  
If the selected code does not have a value in the **eSignature User Group** field on the **Status Management Flow** page, the **Pending Change Status To** field value is not displayed.
3. Select **OK** to confirm. The **Pending Change Status To** field displays the description from the selected status line.
4. Select the **Pending Change Status To** field value to navigate to the **eSignature Request Entries** page.
5. Sign the document to complete the status change.
6. On the action bar, select **Related > Status Management Log**. The **Status Management Log** page opens. On the **Approved / Rejected** FastTab, you can view the information of the status after changing the **Status Mgmt. Description** field value.

| Field Name             | Description                                                      |
|------------------------|------------------------------------------------------------------|
| Entry No.              | Specifies the unique entry number for the approval or rejection. |
| From Status            | Specifies the original status before the action.                 |
| To Status              | Specifies the new status after the action.                       |
| eSignature User Group  | Specifies the user group authorized to provide an eSignature.    |
| User ID                | Specifies the ID of the user who performed the action.           |
| Signing Authority      | Specifies the person name authorized to approve or reject.       |
| Status                 | Specifies the current status of the request.                     |
| Signed Date and Time   | Specifies the date and time when the request is signed.          |
| Key                    | Specifies the unique identifier for the signature record.        |
| Comment                | Specifies the remarks provided during approval or rejection.     |
| Delegated From User ID | Specifies the ID of the user who delegated the task.             |



# View comment information on the FactBox

Article • 8/28/2024 • 2 min read

You can view comprehensive quality control and Corrective and Preventive Action (CAPA) information through dedicated FactBoxes that provide real-time visibility into non-conformance records, status tracking, and associated quality control checks.

## View the CAPA checkbox

To view the **CAPA** checkbox, select the **CAPA Actions** FactBox on the **Vendor Non-Conformance** page.

! Note

When the **Deadline** field value exceeds the configured date on the **Vendor Non-Conformance** page, the system updates the **Code** and **Status** field values in red color on the FactBox.

## View the Additional Information FactBox

On the **Additional Information** FactBox, you can view comprehensive tracking information for non-conformance records.

| Field                   | Description                                                         |
|-------------------------|---------------------------------------------------------------------|
| Related Non-Conformance | Displays the linked non-conformance record ID along with its status |
| Days Open               | Displays the number of days the record remained open                |
| Days Since Last Update  | Displays the number of days since the record was last updated       |

## View the Quality Control Check FactBox

The system displays the **Quality Control Check** FactBox in the associated non-conformance documents when you create or link quality control checks by executing the **Create Quality Control Check** and **Link Quality Control Check** actions. On the **Quality Control Check** page, the field values associated with the non-conformance document are automatically updated.

You can view quality control and non-conformance information through FactBoxes on the following pages:

- Customer Non-Conformance



Non Conformances

- Vendor Non-Conformance
- Internal Non-Conformance



# Deployment Instructions

Article • 4/6/2023 • 1 min read

To set up the Aptean **Non Conformances** extension on your Business Central environment, click [here](#).



# Postman Instructions to test Aptean Food and Beverage APIs

Article • 4/6/2023 • 14 min read

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

## Prerequisites

1. The latest version of Postman app can be downloaded [here](#).
  - a. Postman account (free or Gmail) must be created.
  - b. Set up Workspace for **Debugging and manual testing**.
  - c. Team creation is not mandatory.
2. Get app registration information to be able to authenticate by using **OAuth** against your Business Central Online environment or create one as described in the Microsoft documentation.
  - a. Create an app registration using the instructions [here](#).
  - b. Setup the app registration using the instructions [here](#).
  - c. Start using **OAuth** in Postman API requests using the instructions [here](#).

### Important

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

## Import and configure Postman Environment

1. Download the latest version of Postman Aptean BC Environment Variables [here](#).
  - a. Select **Import** and import the **Aptean BC.postman\_environment.json** file.
  - b. Select the **Aptean BC** environment. Click the Environment quick look icon  and then click **Edit** to set the current values for variables.



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

### Note

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

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

## Import Postman Requests Collection

1. Download the latest version of Postman Aptean Non Conformances Requests Collection [here](#).
  - a. **Import** again and import the **Aptean Non Conformances.postman\_collection.json** file. Open **Collections** to find all provided requests.
2. Initialize your environment variables by running the **GET Requests**.
  - a. **Initialize Companies Environment Variables**
  - b. **Initialize Lot Environment Variables**

### Important

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

Now you can test all provided requests and see the response messages.



 Note

The customer used for testing should have some non-conformances available.



# Integrations

Article • 8/27/2025 • 1 min read

The Aptean Non Conformances extension has been integrated with the following extensions:

- [Aptean eSignature](#)
- [Aptean Quality Control](#)



# Aptean e-signature

Article • 8/27/2024 • 1 min read

When the Aptean Non Conformances extension is used in conjunction with the Aptean [eSignature](#) extension, the system requires digital signatures during non-conformance resolution and corrective action processes. For more information, see [Manage eSignature](#).



# Aptean Quality Control

Article • 8/27/2024 • 1 min read

When the Aptean Non Conformances extension is used in conjunction with the Aptean [Quality Control](#) extension, you can link quality control checks directly from non-conformance documents to streamline quality management workflows.

