

User Manual

Aptean Food and Beverage ERP

Over and Under Delivery

Product Documentation



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Release notes

Article • 3/25/2026 • 2 min read

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

Date	Release version	Description
March 2026	2601.3.0.0	Stability release
February 2026	2601.2.0.0	Platform release
February 2026	2601.1.0.0	Stability release
January 2026	2601.0.0.0	Feature release
November 2025	2507.2.0.0	Stability release
November 2025	2507.1.0.0	Stability release
November 2025	2507.0.0.0	Feature release
October 2025	2506.2.0.0	Stability release
September 2025	2506.1.0.0	Stability release
September 2025	2506.0.0.0	Feature release
August 2025	2505.0.0.0	Feature release
August 2025	2504.1.0.0	Stability release
July 2025	2504.0.0.0	Feature release
July 2025	2503.0.0.0	Feature release
July 2025	2502.1.0.0	Stability release
July 2025	2502.0.0.0	Feature release
May 2025	2501.5.0.0	Stability release
May 2025	2501.4.0.0	Stability release
April 2025	2501.3.0.0	Stability release
March 2025	2501.2.0.0	Stability release



Over and Under Delivery

February 2025	2501.1.0.0	Stability release
February 2025	2501.0.0.0	Feature release
February 2025	2406.13.0.0	Stability release
January 2025	2406.12.0.0	Stability release
January 2025	2406.11.0.0	Stability release
December 2024	2406.10.0.0	Stability release
November 2024	2406.9.0.0	Stability release
November 2024	2406.8.0.0	Stability release
November 2024	2406.7.0.0	Stability release
November 2024	2406.6.0.0	Stability release
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September 2024	2406.3.0.0	Stability release
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September 2024	2406.1.0.0	Platform release
September 2024	2406.0.0.0	Feature release
September 2024	2405.0.0.0	Feature release
August 2024	2404.2.0.0	Stability release
August 2024	2404.1.0.0	Stability release
June 2024	2404.0.0.0	Feature release
May 2024	2403.1.0.0	Stability release
April 2024	2403.0.0.0	Feature release
April 2024	2402.1.0.0	Stability release
April 2024	2402.0.0.0	Feature release
March 2024	2401.2.0.0	Stability release



Over and Under Delivery

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February 2024	2401.0.0.0	Feature release
February 2024	2301.12.0.0	Stability release
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May 2022	1.9.47953.0	Stability release



2601.3.0.0

Release Note • 3/25/2026 • 1 min read

Enhancements/Modifications

With this release of the Aptean Over Under Delivery extension,

- This extension has been updated to ensure interoperability with the recent changes in the Aptean Catch Weight extension. To know more, see [What's new in Catch Weight, version 2601.3.0.0](#).
- The system bypasses the under-delivery error for purchase orders and sales orders when the **Skip Under Delivery Prepayment Error Check** toggle is turned on, even if the purchase or sales line is under-delivered. This allows the user to proceed with posting the invoice. For more information, see [Underdelivery](#).

UI/UX changes

The **Skip Under Delivery Prepayment Error Check** toggle has been added to the **Over & Underdelivery Setup** page.

See also

- [Known issues](#) - Lists current issues and their status.



2601.2.0.0

Release Note • 2/26/2026 • 1 min read

Enhancements/Modifications

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

- The *OnAfterInitFromPurchLine* event subscriber in the *TrackingSpecSubscr24FDW* codeunit has been moved from the tracking specification table to the *Purch. Line-Reserve* codeunit.
- The *OnAfterInitFromSalesLine* event subscriber in the *TrackingSpecSubscr24FDW* codeunit has been moved from the tracking specification table to the *Sales Line-Reserve* codeunit.
- The *OnBeforeSalesLineModify* event subscriber in the *WhsePostShipmentSubscr24FDW* codeunit has been moved from the *Whse.-Post Shipment* codeunit to the *Sales Whse. Post Shipment* codeunit, and the invoice parameter has been removed from the procedure signature.



2601.1.0.0

Release Note • 2/25/2026 • 1 min read

Resolved issues

The following issues have been resolved in this release.

ID	Description
353375	<ul style="list-style-type: none">• The system fails to update the Outstanding Quantity field value on the Sales Order page when a warehouse pick is posted with a quantity of 0. Additionally, the system incorrectly allows the creation of additional warehouse shipments for the same source documents.• An error occurs when another user opens the second warehouse shipment after the source document is deleted by posting the first shipment (<i>Ship & Invoice</i>).
342838	The system incorrectly translates the error messages and tooltips on the Sales Order and Over Under Delivery Setup pages, when the language is set to Dutch (nl-NL).



2601.0.0.0

Release Note • 1/28/2026 • 1 min read

Features

With this release of the Aptean Over Under Delivery extension, the system enforces controlled prepayment settlement for both over-delivered and under-delivered purchase and sales orders by restricting invoice posting when prepayment coverage is insufficient or prepayments remain, and by requiring additional prepayment invoices or prepayment credit memos to fully settle the prepayment before invoicing can be completed or the order can be deleted.

Resolved issues

The following issue has been resolved in this release.

ID	Description
347481	The system displays an error when the Under Delivery checkbox is selected in the warehouse pick take lines, even when the Set Outstanding Lines to Under Delivery field value is configured as <i>Unlimited</i> on the Over & Under Delivery Setup page. This prevents the marking partial picks as under delivery for items with 0% allowed under delivery, blocking expected warehouse management operations.

See also

- [Known issues](#) - Lists current issues and their status.



2507.2.0.0

Release Note • 11/28/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
330604	The system fails to select the Underdelivery checkbox on the Warehouse Shipment page even though the Underdelivery checkbox is selected on the related Warehouse Pick page when the Qty. to Handle field value is set to 0. This issue occurs when the Aptean Production Over Pick extension is installed.



2507.1.0.0

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

Enhancements/Modifications

With this release of the Aptean Over Under Delivery 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
333940	The system fails to display an error when executing the Set Outstanding Lines as Underdelivery action on the Sales Order page when the value entered in the Qty. to Ship field is less than the value defined in the Allowed Underdelivery % field. This issue occurs when the Set Outstanding Lines to Underdelivery Rule field value is set to <i>Unlimited</i> on the Over & Underdelivery Setup page.
329648	An error occurs on the Sales Order page while selecting the Underdelivery checkbox for an entry after running the Requisition Worksheet page with the same item which is non-lot tracked. This issue also occurs when executing the Move to New Order action on the Backorder Management List page.



2507.0.0.0

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

Features

With the feature added in this release of the Aptean Over Under Delivery extension, the over and under delivery tolerances configured for an item are automatically applied to the related drop shipment documents.

Integration

The Aptean Over Under Delivery extension has been integrated with the Aptean [Drop Shipment](#) extension. For more information, see [Integrations](#).



2506.2.0.0

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

Resolved issues

The following issue has been resolved in this release.

ID	Description
323095	The system incorrectly updates the Qty. to Handle (Base) field value during quantity conversion between units of measure on the Warehouse Pick page, resulting in inconsistent quantities across the take and pick license plates on the Warehouse Entries page.



2506.1.0.0

Release Note • 9/24/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
209012	The system incorrectly updates the outstanding quantity for packaging items on the Purchase Order page when increasing the Qty. to Receive field value for the associated food items. This issue occurs only when the Aptean Packaging extension is installed.



2506.0.0.0

Release Note • 9/24/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Over Under Delivery extension, the *OnBeforeCheckWhseActivLineIsEmpty* event subscriber on the *WhseActivityRegisterSubcr24FDW* codeunit has been removed for better warehouse management system handling and to restrict the system from automatically setting the quantities to zero during warehouse activity registration.



2505.0.0.0

Release Note • 8/27/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Over Under Delivery extension, the system recalculates packaging lines and improves packaging accuracy for both item-bound and order-bound lines, including handling unexpected items on purchase orders when this extension is used in conjunction with the Aptean Packaging extension. For more information, see [What's new in Packaging, version 2506.0.0.0](#).

Integrations

The Aptean Over Under Delivery extension has been integrated with the Aptean [Packaging](#) extension. For more information, see [Integrations](#).



2504.1.0.0

Release Note • 8/27/2025 • 1 min read

Resolved issues

The following issues have been resolved in this release.

ID	Description
314915	An error occurs when executing the Undo Shipment action on the Lines FastTab of the Posted Sales Shipment page. This issue occurs when the Underdelivery checkbox is selected on the Warehouse Pick page.
307818	An error occurs when posting items on the Warehouse Receipt page if the Base Unit of Measure field value on the Item Card page differs from the Unit of Measure Code field value on the Purchase Order page with the Underdelivery Allowed toggle on the Vendor Card page turned on.



2504.0.0.0

Release Note • 7/30/2025 • 1 min read

Enhancements/Modifications

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



2503.0.0.0

Release Note • 7/30/2025 • 1 min read

Features

With the feature added in this release of the Aptean Over Under Delivery extension, the system displays overdelivery and underdelivery fields on the **Item Template**, **Customer Template** and **Vendor Template** pages.

UI/UX changes

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

- The following fields have been added to the **Item Template** page:
 - Allowed % Underdelivery
 - Allowed % Overdelivery
- The following fields have been added to the **Customer Template** page:
 - Underdelivery Allowed
 - Requires Underdelivery Reason Code
 - Overdelivery Allowed
 - Requires Overdelivery Reason Code
- The following fields have been added to the **Vendor Template** page:
 - Underdelivery Allowed
 - Overdelivery Allowed



2502.1.0.0

Release Note • 7/30/2025 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean Catch Weight extension. To know more, see [What's new in Catch Weight, version 2505.1.0.0](#).

Resolved issues

The following issue has been resolved in this release.

ID	Description
289883	The system fails to display underdelivered items from posted shipment lines with the Underdelivery checkbox selected and the Quantity field value set to 0, when using the ShipmentVarianceOUD web service.



2502.0.0.0

Release Note • 7/2/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Over Under Delivery extension, you can configure the **Underdelivery** toggle on the **Receipt** module of the Aptean WMS scanner to specify whether the activity involves over or underdelivery. To know more, see [What's new in Warehouse Management System, version 1.11.245550.0](#).



2501.5.0.0

Release Note • 5/21/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Over Under Delivery extension, the system does not enforce a limit on

- The **Allowed Overdelivery %** field value on the **Item Card** page.
- The **Allowed Overdelivery %** field value of the purchase and sales lines.

You can directly enter a quantity greater than the ordered quantity on the following pages:

- Purchase Order
- Sales Order
- Warehouse Receipt
- Warehouse Shipment
- Inventory Put-away
- Inventory Pick
- Warehouse Pick

For more information see, [Overdelivery](#) and [Set up over under delivery](#).



2501.4.0.0

Release Note • 5/7/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
285788	The system incorrectly considers the warehouse shipment lines that are fully picked and displays an error when selecting OK on the Set Outstanding Lines As Underdelivery page.



2501.3.0.0

Release Note • 4/23/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Over Under Delivery extension, the system displays a confirmation message for each line when posting a warehouse shipment involving license plate-tracked items with underdelivery. After confirmation, the system proceeds to post the shipment.



2501.2.0.0

Release Note • 3/13/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
257095	An error occurs when posting an inventory put-away if the Underdelivery checkbox is selected for multiple lines on the Inventory Put-away page, each containing the same item with different lots assigned.



2501.1.0.0

Release Note • 2/27/2025 • 1 min read

Enhancements/Modifications

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

Integrations

The Apteian Over Under Delivery extension has been integrated with the Apteian [EDI](#) extension.

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



2501.0.0.0

Release Note • 2/12/2025 • 1 min read

Features

With this release of the Aptean Over Under Delivery extension, the system automatically deletes warehouse receipts and inventory put-aways after partially invoicing a purchase order when the **Underdelivery** checkbox in the purchase order line is selected. This updates the **Underdelivery** checkbox and **Receipt Variance** field value on the associated posted purchase receipt, posted warehouse receipt, and posted inventory put-away documents.



2406.13.0.0

Release Note • 2/5/2025 • 1 min read

Enhancements/Modifications

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



2406.12.0.0

Release Note • 1/29/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
259610	An error occurs when trying to register a warehouse pick marked as underdelivery with the Qty. to Handle field set to 0. The error message states, " <i>Qty. to Ship must not be greater than 0 units</i> " on the warehouse shipment line, even though the quantity to ship for the line is 0.



2406.11.0.0

Release Note • 1/29/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
259135	An error occurs upon executing the Set Outstanding Lines as Under Delivery action on the Sales Order page.



2406.10.0.0

Release Note • 12/4/2024 • 1 min read

Resolved issues

The following issues have been resolved in this release.

ID	Description
241122	The system incorrectly updates the Underdelivery toggle in the warehouse shipment line for non-lot tracked items upon executing the Set Outstanding Line as Underdelivery action on the Warehouse Shipment page. This issue occurs when the Quantity to Ship field value does not match the Qty. Picked field value on the Warehouse Shipment page. Additionally, the system does not display the expected error message.
241356	The system incorrectly updates the Quantity (Base) field value on the Item Tracking Lines page using the variance in the non-base unit of measure from the Purch. Unit of Measure field, instead of converting it to the base unit of measure.



2406.9.0.0

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

Resolved issues

The following issue has been resolved in this release.

ID	Description
244041	An error occurs upon executing the Post > Receive action on the Inventory Put-away page when the quantity of the selected item is split and different lots are assigned to each line.



2406.8.0.0

Release Note • 11/14/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
241769	An error occurs upon executing the Register Pick action on the Warehouse Pick page when attempting to register the remaining quantity to pick after initially registering partial quantity. Additionally, the system incorrectly updates the Quantity field value on the Warehouse Shipment page with the partially registered quantity when a warehouse pick for the partial quantity is initially created. This issue occurs when the Require Pick toggle on the Warehouse FastTab of the associated Location card page is turned off.



2406.7.0.0

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

Resolved issues

The following issue has been resolved in this release.

ID	Description
242778	An error occurs on the Warehouse Receipt page when trying to post the warehouse receipt after updating the quantity in the associated item tracking lines. This issue arises when the purchase unit of measure is different from the base unit of measure.



2406.6.0.0

Release Note • 11/1/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
242350	An error occurs on the Warehouse Shipment page upon executing the Set Outstanding Lines as Underdelivery action during a partial shipment.



2406.5.0.0

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

Resolved issues

The following issue has been resolved in this release.

ID	Description
238770	An error occurs upon executing the Set Outstanding Lines as Underdelivery action on the Warehouse Shipment page, causing the system to fail in selecting the Underdelivery checkbox on the relevant warehouse shipment lines. This issue arises when the associated warehouse pick has been partially shipped.



2406.4.0.0

Release Note • 10/14/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Over Under Delivery extension, you can view the remaining quantity in the **Receipt Variance** field on the **Purchase Order Archive** page after partially receiving items in a purchase order with underdelivery functionality. Additionally, the system automatically selects the **Underdelivery** checkbox on the **Purchase Order Archive** page for the corresponding record. This enhancement addresses the issue reported in bug ID #233259.

UI/UX changes

The **Underdelivery** checkbox and the **Receipt Variance** field have been added to the lines of the **Purchase Order Archive** page.



2406.3.0.0

Release Note • 9/27/2024 • 1 min read

Enhancements/Modifications

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



2406.2.0.0

Release Note • 9/16/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
232098	An error occurs when processing a blanket purchase order with a negative quantity for a G/L account. This issue arises when Underdelivery Allowed and/or Overdelivery Allowed toggles are set to <i>Yes</i> on the Receiving FastTab of the Vendor Card , resulting in incorrect ledger entries.



2406.1.0.0

Release Note • 9/5/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Over Under Delivery extension, the *OnBeforeDeleteUnderDeliveredWhseShptLine* procedure has been added to the *WhseActOverUnderDelivery24FDW* codeunit to enhance customization during the deletion of warehouse shipment line. Additionally, the *UpdateSalesLineFromWarehouseShipmentLine* and *IsOverUnderDelivReasonCodeRequiredOnWhseShptLine* procedures in the *WhseActOverUnderDelivery24FDW* codeunit are changed from internal to global to support customization.



2406.0.0.0

Release Note • 9/4/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Over Under Delivery extension, the system supports flexibility in handling quantities that deviate from the ordered amount for both inbound receiving and outbound shipping in the WMS scanner. To know more, see [What's new in Aptean Warehouse Management System, version 2402.0.0.0](#).

Integrations

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



2405.0.0.0

Release Note • 9/3/2024 • 1 min read

Features

With this release of the Aptean Over Under Delivery extension, you can:

- Create a purchase order line for items that are received unexpectedly during a warehouse receipt from the **Warehouse Receipt** page.
- Identify the lines that are added from warehouse receipts as unexpected items on the purchase order.

For more information, see [Add unexpected items to purchase order](#).

UI/UX changes

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

- The **Add Unexpected Item** action is added to the lines of the **Warehouse Receipt** page.
- The **Unexpected Item From Whse. Receipt** checkbox is added to the lines of the following pages:
 - Purchase Order
 - Posted Purchase Receipt
 - Purchase Invoice
 - Posted Purchase Invoice

Note

This checkbox is only visible when personalized.

- The **Unexpected Item** checkbox is added to the lines of the following pages:
 - Warehouse Receipt
 - Posted Warehouse Receipt



2404.2.0.0

Release Note • 8/29/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
227211	The system fails to delete the lines for which the Underdelivery checkbox is selected upon executing the Post and Print action on the Warehouse Shipment page.



2404.1.0.0

Release Note • 8/20/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Over and Under Delivery extension, modifications have been made to accommodate the following changes:

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

! Note

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



2404.0.0.0

Release Note • 6/5/2024 • 1 min read

Enhancements/Modifications

The Overdelivery functionality maintains the quantity in the item tracking lines using a value in the **Qty. to Handle** or **Qty. to Receive** field on the **Purchase Order** or **Warehouse Receipt** page when posting the document (reference Ticket No. 204140).



2403.1.0.0

Release Note • 5/30/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
174369	The Qty. to Ship field value is incorrectly updated on a sales order when the lot number for the item is assigned via the Trading Board page and the Overdelivery or Underdelivery checkbox is selected on the Lines FastTab of the Sales Order page.



2403.0.0.0

Release Note • 4/17/2024 • 1 min read

Enhancements/Modifications

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



2402.1.0.0

Release Note • 4/5/2024 • 1 min read

Enhancements/Modifications

Modifications were implemented in this extension to address the error encountered when adjusting the **Quantity to Receive** field for an item with an assigned lot using the **Set Outstanding Lines As Underdelivery** action. This ensures synchronization of item tracking with the new received quantity.



2402.0.0.0

Release Note • 4/3/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Over Under Delivery extension, you can directly change the values in the Quantity fields on the **Item Tracking Lines** page by changing the value in the **Qty. to Receive** field on the **Purchase Order** or **Warehouse Receipt** page. This feature is available for both Overdelivery and Underdelivery. To know more, see [Overdelivery](#) and [Underdelivery](#).



2401.2.0.0

Release Note • 3/20/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
174369	The Quantity to Ship field is updated with a wrong value for an item having allowed Overdelivery and Underdelivery on the Lines FastTab of the Sales Order page. This occurs when the Lot No. for the Item is assigned on the Trading Board page.



2401.1.0.0

Release Note • 3/7/2024 • 1 min read

Enhancements/Modifications

With this release of the Apteau Over Under Delivery extension, certain captions and tooltips have been curated to remove erroneous spellings and enhance the readability in French version (fr-FR).



2401.0.0.0

Release Note • 2/26/2024 • 1 min read

Enhancements/Modifications

Modifications were made for this extension to accommodate the changes in the Aptean Contract Management extension. To know more, see [What's new in version 2401.0.0.0](#).



2301.12.0.0

Release Note • 2/21/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
177698	While performing a Warehouse Pick activity, the checks do not occur for Over or Under delivery, resulting in a deadlock scenario that leads to a performance issue.



2301.11.0.0

Release Note • 2/7/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
174995	When releasing the Purchase Order , the system encounters a deadlock, preventing successful completion of the other transactions which use the same database resource.



2301.10.0.0

Release Note • 1/24/2024 • 1 min read

Resolved issues

The following issues have been resolved in this release:

ID	Description
161462	An error occurs while performing an Over Pick for an already registered Warehouse Pick.
166282	An error occurs while performing a partial Warehouse Pick activity with Over Delivery for the remaining quantity on the Aptean Mobile Warehouse Registration extension.



2301.9.0.0

Release Note • 1/12/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
160938	When multiple users attempt to register the Pick simultaneously using the Aptean Mobile Warehouse Registration application, it triggers a deadlock scenario where both users try to update shared data concurrently, resulting in an error stating <i>The activity was deadlocked with another user. Please retry the activity.</i>



2301.8.0.0

Release Note • 1/10/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
167241	After creating the Warehouse Shipment and Pick with zero quantity for a Sales Order with the item's Allowed % Underdelivery set to 100, the Sales Order still appears on the Shop Floor Activities page.



2301.7.0.0

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

Resolved issues

The following issue has been resolved in this release:

ID	Description
160421	Unable to register the Warehouse Picks when the Underdelivery checkbox is selected on the warehouse pick lines.



2301.6.0.0

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

Resolved issues

The following issues have been resolved in this release:

ID	Description
153155	On the Sales and Purchase Order pages, the Completely Shipped and Completely Received fields are not updated correctly when performing the Set Outstanding Lines as Underdelivery action.
159744	When performing the Set Outstanding Lines As Underdelivery action to update the Underdelivery checkbox on the Sales and Purchase Order pages, the corresponding Warehouse Shipments and Warehouse Receipts are not created.



2301.5.0.0

Release Note • 12/5/2023 • 1 min read

Enhancements/Modifications

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



2301.4.0.0

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

Resolved issues

The following issue has been resolved in this release:

ID	Description
157418	An error occurs when registering the pick document for which the Qty. to Ship is 0 and the Underdelivery checkbox is selected on the associated Warehouse Shipment.



2301.3.0.0

Release Note • 11/21/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
160528	An error occurs when attempting to select the Underdelivery checkbox on the purchase order line that has an outstanding quantity and assigned item tracking.



2301.2.0.0

Release Note • 11/1/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
153146	On the Purchase Order page, the system doesn't allow the execution of the Set Outstanding Lines as Underdelivery function if the purchase order contains line items with Type G/L Account .



2301.1.0.0

Release Note • 9/16/2024 • 1 min read

Enhancements/Modifications

Modifications were made to this extension to work in conjunction with the Apteau [Weigh Scale](#) extension. You can now assign a preferred system of measurements as default to specific locations and directly retrieve measurements from electronic scales into Business Central. For more information, see [Highlights of version 2301.0.0.0](#).



1.21.112490.0

Release Note • 8/9/2023 • 1 min read

Features

The following features were added in this release of the Aptean Over and Under Delivery extension:

- Hide Business Central's standard over-receiving fields to prevent users from confusing them with those provided by this extension. For more information, see [Hide standard over-receipt fields](#).
- Choose to respect the value set in the **Allowed % Underdelivery** field when using the Set Outstanding Lines to Under Delivery action. For more information, see [Setup](#).
- When posting a purchase order, it will be deleted if there are no outstanding quantities on any of the purchase lines.
- Underdelivery is not allowed for lines in a sales, purchase or return order if the line has:
 - A reserved quantity greater than the quantity to ship/receive
 - Item tracking has been created for the original quantity



1.21.112420.0

Release Note • 12/5/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
139013	If the Qty. to Handle field on the Lines FastTab of the Warehouse Pick page has a decimal value, an error occurs while performing the Register Pick action.



1.20.110144.0

Release Note • 7/26/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
132906	An error occurs while selecting the item number on the Purchase document lines when the Aptean Over Under Delivery extension status is set to <i>Invalid</i> on the Subscription Overview page.



1.19.108304.0

Release Note • 7/12/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
125294	An error occurs when executing the Undo Receipt function on the Posted Purchase Receipt page.



1.18.106026.0

Release Note • 6/27/2023 • 1 min read

Enhancements/Modifications

Modifications were made for this extension to accommodate the changes in the Aptean [Mobile Warehouse Registration](#) extension. To know more, see [What's new in version 1.23.106042.0](#).



1.17.96064.0

Release Note • 5/8/2023 • 1 min read

UI/UX Changes

In this release, the **Over & Underdelivery Reason Code** page has been renamed to **Over & Underdelivery Reason Codes**.



1.16.92525.0

Release Note • 12/5/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
110864	While searching, the Set Outstanding Lines As Underdelivery page is displayed in the Report and Analysis section.



1.15.86894.0

Release Note • 12/5/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
94447	While posting the Warehouse Receipt with the Underdelivery toggle enabled, the order is not reported as completely received and it is still displayed on the Shop Floor Activities page.



1.14.83512.0

Release Note • 12/5/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
93238	An error message is displayed while posting a partial purchase invoice.



1.13.66067.0

Release Note • 12/5/2023 • 1 min read

Resolved issues

The following issues have been resolved in this release:

ID	Description
72641	An error occurs if the value entered in the Qty. to Receive field on the Warehouse Receipt is higher than the Quantity received from the Purchase Order. But, the entered Qty. to Receive value is within 50% of the value entered in the Allowed % Underdelivery and Allowed % Overdelivery fields on the Item Card.
81902	When selecting the Set Outstanding Lines as Underdelivery function, the system does not update the Outstanding Amount on the Sales Order, and Purchase Order.
74803	The Warehouse Receipt page closes due to an error while entering decimal values in the Qty. to Receive field. The Warehouse receipts cannot be posted for the quantities entered in decimal values.



1.12.64169.0

Release Note • 5/8/2023 • 1 min read

Enhancements/Modifications

Minor technical changes were made for Aptean Over & Under Delivery extension to work seamlessly with the Aptean Advanced Lot Attribute extension. The Aptean Advanced Lot Attribute extension helps you to manage a specific set of business rules implemented over the lot attributes functionality.



1.11.62427.0

Release Note • 12/5/2023 • 1 min read

Enhancements/Modifications

Minor technical changes were made for Apteau Over & Under Delivery extension to accommodate the **Unlimited Overdelivery** toggle added on the Apteau Weighbridge Receipting extension. This helps you in accepting the unlimited overdelivery of the items received at the Weighbridge. Previously, the Over & Under Delivery extension could accept only 100% overdelivery of items. The Apteau Weighbridge Receipting extension calculates the weight of the received items internally by recording the weights of the loaded and unloaded trucks.



1.11.58592.0

Release Note • 12/5/2023 • 1 min read

Features

With the features included in this release of Aptean Over & Under Delivery extension, you can

- Add the Over & Underdelivery Reason Codes for document lines having over or underdelivery. For more details, [see here](#).
- Customize whether the Over & Underdelivery Reason Code is required for each customer. If the Over & Underdelivery Reason Code is set as mandatory on the customer card, the system throws an error when posting the sales order/warehouse shipment. For more details, [see here](#).
- Set document lines having zero quantity to underdelivery. For more details, [see here](#).
- Set outstanding document lines to underdelivery, with the introduction of an action button. For more details, [see here](#).

Resolved issues

The following issues have been resolved in this release:

ID	Description
46952	Underdelivery Set in Warehouse Shipment Line does not result in Sales Line updates, when warehouse pick is deleted or partially registered.
46954	Sales Order does not delete upon Post Invoice despite all lines having zero outstanding quantity.
50382	Underdelivery Boolean updates multiple Pick lines yet Variance does not update and lines do not delete on 'Register'.



1.10.50899.0

Release Note • 12/5/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
54935	Cannot match Item tracking when over receiving and auto-assigning lot numbers through Mobile Warehouse Registration.



1.9.47953.0

Release Note • 4/3/2023 • 1 min read

Enhancements/Modifications

The enhancements in this release are listed below:

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



Introduction

Article • 4/3/2023 • 2 min read

In the current version of Microsoft Dynamics 365 Business Central, it is not possible to receive or ship more or less than the specified quantity in an order. It allows you to use Over-receipt codes to receive in a quantity of goods which is higher than the ordered quantity on a Purchase Order. The Aptean Over Under Delivery (OUD) extension makes it possible to receive or ship more or less than the original ordered quantity.

Registering Overdelivery and Underdelivery is possible on the following document types:

- Purchase Order (Line type = Item)
- Warehouse Receipt for Purchase Order
- Inventory Put-Away for Purchase Order
- Sales Order (Line type = Item)
- Warehouse Shipment for Sales Order
- Inventory Pick for Sales Order
- Warehouse Pick for Sales Order

The purchase and sales lines created from drop shipments and special orders, are not supported.

In case of underdelivery, it is possible to mark a purchase receipt or sales shipment as complete, with the remaining outstanding quantity being set to zero after posting the purchase order. An example of underdelivery is when a bulk supplier only delivers 998 kg while the company ordered 1000 kg. In this case the employee can register the 998 kg and the remaining quantity is set to zero after posting.

The price and discount are determined on the original quantity. For example, if a volume discount exists at 1000 kg, the price in the previous example will be determined whilst taking into account the volume discount, even though only 998 kg was delivered.

In the case of overdelivery, it is possible to register more than the original quantity, without increasing the quantity. For example, if a supplier delivers 1002 kg instead of the agreed 1000 kg, then the employee can register the 1002 kg without changing the order.

The Odata-feeds that can be used for Underdelivery and Overdelivery are automatically created in the Web Services when installing the extension. They can be used for Power BI reporting regarding underdelivery and overdelivery.



Setup

Article • 11/12/2024 • 1 min read

The following setup are required.

- [Manage permission sets](#)
- [Set up over under delivery](#)
- [Over & Underdelivery Reason Codes](#)



Manage permission sets

Article • 11/12/2024 • 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 *OVERUNDERDELIVERYFDW*.

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 *OVERUNDERDELBASICFDW*.

User-defined permission sets

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

Assign a permission set



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



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

The associated fields are automatically updated based on the entered value.

The user has the necessary permissions to use the features of the Aptean Over Under Delivery extension, ensuring secure and role-based access.



Set up over under delivery


Article • 7/30/2025 • 12 min read

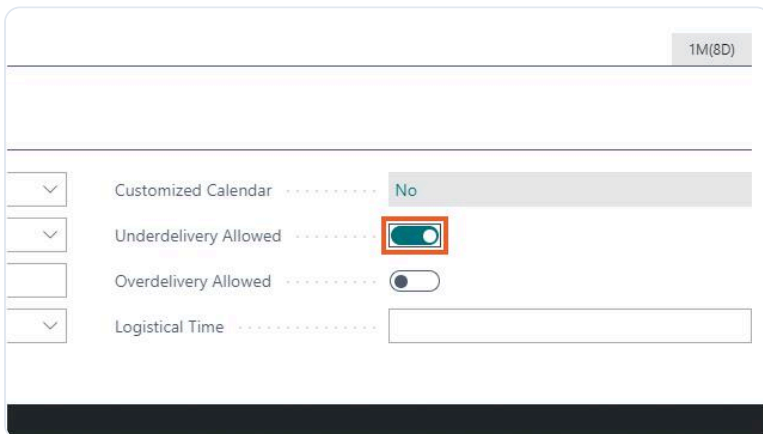
Before being able to post an underdelivery and/or overdelivery, you need to configure some settings.

Enable underdelivery or overdelivery per vendor/customer

It is possible to define per vendor/customer if underdelivery and overdelivery are allowed. When turning the underdelivery and overdelivery toggle on, the system will check the allowed percentages of underdelivery and overdelivery per item and copy these percentages to the order lines. When turning the underdelivery and overdelivery toggle off for the vendor or customer, the system will ignore the allowed percentages of underdelivery and overdelivery per item and will show percentages of 0% on the order lines. However, it is always possible to overrule these percentages in the order. An example of enabling underdelivery and overdelivery for a vendor is in the description below.



1. Select the Search icon , enter **Vendors**, and then choose the related link.
The **Vendors** list page opens.
2. Select the desired **No**.
The **Vendor Card** page opens.
3. On the **Receiving** FastTab, turn on the **Underdelivery Allowed** toggle.



If the toggle is turned off, the allowed percentage of underdelivery is set to 0% on each order line when creating a purchase order for this vendor. If the toggle is turned on, the allowed percentage of underdelivery is copied from the item setup to the order line.

4. Turn on the **Overdelivery Allowed** toggle.



The screenshot shows a configuration form for a vendor. At the top right, there is a tab labeled '1M(8D)'. Below it, there are four rows of configuration options, each with a dropdown arrow on the left and a field on the right:

- Row 1: 'Customized Calendar' with a dropdown arrow and a field containing the text 'No'.
- Row 2: 'Underdelivery Allowed' with a dropdown arrow and a toggle switch that is currently turned off.
- Row 3: 'Overdelivery Allowed' with a dropdown arrow and a toggle switch that is currently turned on. This toggle switch is highlighted with a red rectangular box.
- Row 4: 'Logistical Time' with a dropdown arrow and an empty text input field.

If the toggle is turned off, the allowed percentage of overdelivery is set to 0% on each order line when creating a purchase order for this vendor. If the toggle is turned on, the allowed percentage of overdelivery is copied from the item setup to the order line.

Note

The system inherits the **Underdelivery Allowed** and **Overdelivery Allowed** field values on the **Vendor Template** page from the **Vendor Card** page. Additionally, you can manually select the field values.

Set the allowed percentage underdelivery and overdelivery per item

It is possible to define the allowed percentage of underdelivery and overdelivery per item. These percentages are copied to the order line (if the vendor/customer is set to allow underdelivery and overdelivery). If the percentages are not entered, 0% underdelivery or overdelivery will be allowed on the order line. However, it is always possible to overrule these percentages in the order.



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

The **Items** list page opens.

2. Select the desired **No**.

The **Item Card** page opens.

3. On the **Warehouse** FastTab, in the **Allowed % Underdelivery** and **Allowed % Overdelivery** fields, enter the values.

The value must be greater than zero. There is no maximum limit for the **Allowed Overdelivery %** field, providing flexibility in receiving or shipping quantities that exceed the ordered amount.

The allowed percentages for underdelivery and overdelivery are set up.

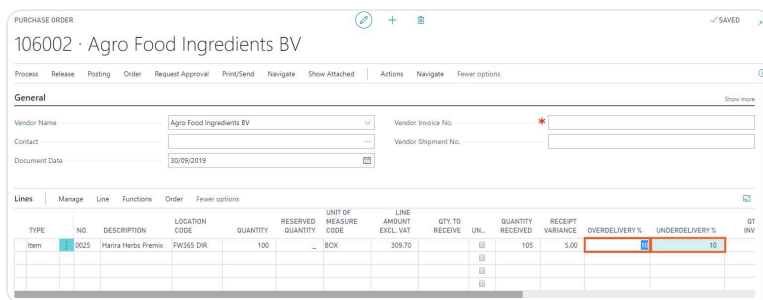


Note

The **Allowed % Underdelivery** and **Allowed % Overdelivery** fields are extended on the **Item Template** page. These fields specify the acceptable percentage of quantity variance allowed during purchase receipt or sales shipment.

Underdelivery and overdelivery percentage in order lines


The allowed underdelivery and overdelivery percentages are shown in the order lines. These fields are invisible by default but can be added using the **Personalise** or **Design** function.



Respect the allowed underdelivery value when setting outstanding lines to underdelivery

You can choose to respect the value set in the [Allowed % Underdelivery](#) field when using the [Set Outstanding Lines to Under Delivery](#) action.



1. Select the Search icon , enter **over & underdelivery setup**, and then choose the related link. The **Over & Underdelivery Setup** page opens.
2. On the **General** FastTab, select *Respect Allowed Percentages* from the **Set Outstanding Lines to Underdelivery** Rule dropdown list.
Now, when you execute the **Set Outstanding Lines to Underdelivery** action on a sales/purchase order or warehouse shipment/receipt, only the lines for which the underdelivery amount falls within the allowed rate will have the **Underdelivery** field selected. If no applicable lines are found, a message will indicate that "No valid lines exist for this action to work."
If you select the **Underdelivery** field on a line that is not valid, an error will be displayed.



 Note

If the **Set Outstanding Lines to Underdelivery Rule** field is set to `_Unlimited_`, the Allowed % Underdelivery value will be ignored when considering outstanding lines as underdeliveries.

Hide standard over-receipt fields

Business Central's standard over-receiving fields can be hidden to prevent users from confusing them with those provided by this extension.



1. Select the Search icon , enter **over & underdelivery setup**, and then choose the related link. The **Over & Underdelivery Setup** page opens.

2. On the **General** FastTab, turn off the **Hide Standard Over-Receipt Fields** toggle.

Select **Yes** on the dialog which appears to accept the following changes:

- The **Over-Receipt Codes** page is made read-only, the **Default** checkbox is cleared for all codes, and over-receipt codes cannot be deleted.
- The **Over-Receipt Code** field is cleared on all items/vendors and hidden in the following locations:
 - On the **Inventory** FastTab on the **Item Card** page
 - On the **Receiving** FastTab on the **Vendor Card** page
- The **Over-Receipt Code** and **Over-Receipt Quantity** fields are hidden from the **Lines** FastTab on the **Purchase Order** and **Warehouse Receipt** page.



Over & underdelivery reason codes


Article • 7/30/2025 • 4 min read

The Over & Underdelivery Reason Code page lets you assign reason codes to an instance of overdelivery or underdelivery in the document line. The Over & Underdelivery Reason Code is required on the Sales Order and Sales Shipment lines.

Setup

To set up reason codes to be used in document lines, follow these steps:




1. Select the Search icon , enter **Over & Underdelivery Reason Codes**, and then choose the related link.
2. In the **Code** field, enter a value.
3. in the **Description** field, enter an explanatory text.
4. In the **Usage** field, select an option from the list: *Overdelivery*, *Underdelivery*, or *Both*.

Customers

You can set up the mandatory requirement of reason code for underdelivery and overdelivery of shipments for each customer. To do so, follow these steps:



1. Select the Search icon , enter **Customers**, and then choose the related link.
The **Customers** list page opens.
2. Select the desired **No.**
The **Customer Card** page opens.
3. On the **Shipping** FastTab, turn on the **Underdelivery Allowed** toggle.
This automatically turns on the **Requires Underdelivery Reason Code** toggle but you can manually disable it.
4. Repeat the above step for overdelivery.



 Note

When **Underdelivery Allowed** and **Overdelivery Allowed** toggles are turned off, you can't turn on the Requires Under/Over Delivery Reason code toggles.

If you turn on the Require Over or Under Delivery Reason code toggle, you need to enter the reason code before posting the documents(Sales Order, Sales Shipment). If not, then the Reason code is optional for you to add.

The system inherits the **Underdelivery Allowed**, **Requires Underdelivery Reason Code**, **Overdelivery Allowed**, and **Requires Overdelivery Reason Code** field values on the **Customer Template** page from the **Customer Card** page. Additionally, you can manually select the field values.



Overdelivery and underdelivery reason codes visibility

Article • 4/3/2023 • 1 min read

The Overdelivery and Underdelivery Reason Codes are visible on the following pages:

- Posted Sales Shipment
- Sales Invoice
- Posted Sales Invoice
- Item Ledger Entries



Overdelivery

Article • 1/28/2026 • 8 min read

The overdelivery functionality enables the receipt or shipment of more than the ordered quantity, to any positive value without increasing the original order quantity.

Registering more than the ordered quantity without increasing the original quantity is possible in the following documents:

- Purchase Order
- Sales Order
- Warehouse Receipt
- Warehouse Shipment
- Inventory Put-away
- Inventory Pick
- Warehouse Pick

The instructions for all these documents are the same. The description below gives an example of registering overdelivery in a warehouse receipt.



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

The **Warehouse Receipts** list page opens.

2. Select the desired **No.**

The **Warehouse Receipt** page opens.

Assign Lot No.

1. On the **Lines** FastTab, in the **Qty. to Receive** field, enter a value.

In this case, the quantity to receive must be greater than the original quantity. Furthermore, the system checks if the entered quantity to receive is lower than the calculated maximum allowed overdelivery, otherwise an error is shown.

2. On the action bar, select **Line > Item Tracking Lines**.

The **Item Tracking Lines** page opens

3. Select **Home > Assign Lot No.**

The lot number is assigned to the quantity entered in the Quantity to Receive.

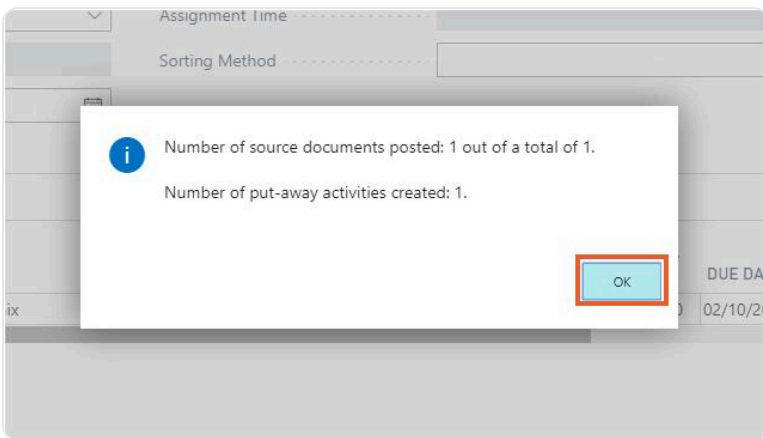
4. Select **Close** .



When you perform an overdelivery on a **Purchase Order** or **Warehouse Receipt** by changing the value in the **Qty. to Receive** field on the **Lines** FastTab with a quantity more than the original, the Overdelivery value is updated in the **Quantity (Base)**, **Qty. to Handle (Base)**, and **Qty. to Invoice (Base)** fields on the **Item Tracking Lines** page. You can perform this action when there is only one item tracking line. In case there are multiple tracking lines, an error will occur while changing the value in the **Qty. to Receive** field.

Post warehouse receipt

1. On the action bar, select **Post Receipt** .
2. Select **Yes** in the confirmation dialog box.
3. Click **OK**.




The warehouse receipt containing the overdelivery is now posted.

Show quantity in order

In the order you can see whether overdelivery has taken place. In the description below, an example is given of showing the quantity in a purchase order.



1. Select the Search icon  , select **Purchase Orders**, and then choose the related link.
The **Purchase Orders** list page opens.
2. Select the desired **No**.
The **Purchase Order** page opens.

After posting, the Quantity remains equal to the originally entered quantity. In a receipt document, the **Receipt Variance** field shows the difference between the Quantity Received and the Quantity, if it is a sales document, it is the **Shipment Variance** field.



Add unexpected items to purchase order

You can account for items that arrive unexpectedly during a warehouse receipt. When an unexpected item is recorded, the system automatically creates a line in the relevant purchase order.

Follow these steps to add an unexpected item.

1. Open the relevant **Warehouse Receipt** page.
2. Choose the warehouse receipt line that is related to the purchase order for which you want to add an unexpected item.

Note

Only lines associated with purchase orders can be selected.

3. On the **Lines** FastTab, select **Line > Add Unexpected Item**.

Note

This action can be executed only when the **Overdelivery Allowed** toggle on the associated **Vendor Card** page is turned on.

The **Add Unexpected Item** page opens.

4. Fill in the fields as follows:

Field	Description
Purchase Order No.	Specifies the purchase order number associated with the warehouse receipt line. This field is non-editable.
Item No.	Select the item number that you want to add as an unexpected item.
Item Description	Specifies the description of the selected item. This value is automatically populated based on the selected item.
Unit Of Measure	Specifies the unit of measure of the item. This field is automatically updated with the base unit of measure for the selected item, but you can modify it if needed.
Qty. To Receive	Enter the quantity of the item that you want to receive.

1. Select **OK**.



The system automatically performs the following:

- Reopens the relevant purchase order and adds a new line for the unexpected item.
- Releases the purchase order again after the line is added.
- Adds a new line for the unexpected item in the warehouse receipt using the **Get Source Document** function.

 Note

The **Unexpected Item** checkbox is automatically selected for warehouse receipt lines that are created using the **Add Unexpected Item** action.

To view the unexpected item added to the purchase order line, follow these steps.

1. Open the relevant **Purchase Order** page.
2. On the **Lines** FastTab, you can view the newly created line for the unexpected item.

 Note

The **Unexpected Item From Whse. Receipt** checkbox is automatically selected for purchase order lines that are created from the warehouse receipt. This checkbox is only visible when personalized.

You can also view the unexpected item lines on the posted documents, such as **Posted Purchase Invoice** and **Posted Warehouse Receipt** pages.

When a purchase or sales order is over-delivered and the value of the received or shipped quantities exceeds the amount covered by posted prepayments, direct invoice posting is not permitted. In this case, additional prepayment invoices must be posted to fully cover the value of the delivered or shipped quantities. Invoice posting becomes available only after prepayment coverage is complete.

 Note

If the invoiced prepayment amount is less than the value of the received or shipped goods, the system displays an error message and does not allow the document to be invoiced directly. In this case, the remaining prepayment must first be posted before the document can be invoiced.

 Note

The system throws an error when shipment lines with over-delivered quantities exist and the extra prepayment invoice is not posted while creating a consolidated sales invoice via the **Combine Sales Shipment** page. The error displays the Sales Order No., Shipment No., and Line No. for the lines where extra prepayment invoices must be posted before the invoice can be created.



Underdelivery

Article • 1/28/2026 • 7 min read

Using the underdelivery function, you can mark the order as complete, so that when the order is posted, the remaining quantity is set to zero, and the order is completely posted.

Registering less than the ordered quantity without decreasing the original quantity is possible in the following documents:

- Purchase Order
- Sales Order
- Warehouse Receipt
- Warehouse Shipment
- Inventory Put-away
- Inventory Pick
- Warehouse Pick

The instructions for all these documents are the same. The description below gives an example of registering underdelivery in a warehouse receipt.



1. Select the Search icon , select **Warehouse Receipts**, and then choose the related link.

The **Warehouse Receipts** list page opens.

2. Select the desired **No.**

The **Warehouse Receipt** page opens.

3. On the **Lines** FastTab, in the **Qty. To Receive** field, enter a value.

In this case, the quantity to receive must be lower than the original quantity.

4. Select the **Underdelivery** checkbox.

Underdelivery is not allowed if the line item has a reserved quantity greater than the quantity to ship/receive. It is also not allowed if item tracking is already created in the document for the original quantity.

You can also use the [Set Outstanding Lines to Underdelivery](#) action to do this automatically for all document lines.

Note

By default, the [Allowed % Underdelivery](#) value is ignored. You can choose to respect this value by [enabling it in the setup](#).



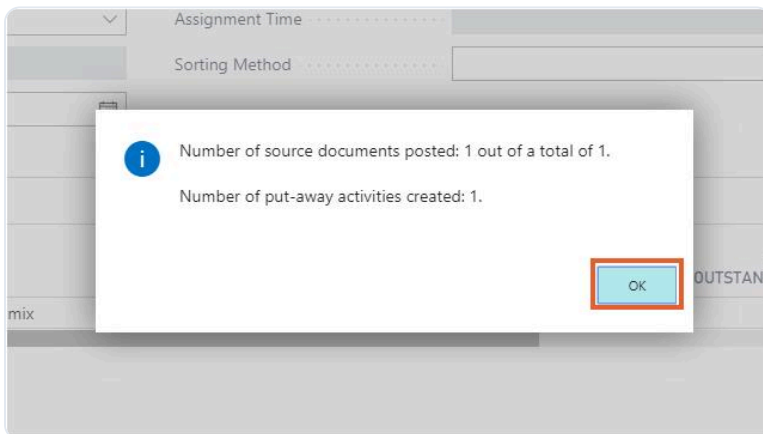
Assign Lot No.

1. On the action bar, select **Line > Item Tracking Lines**.
The **Item Tracking Lines** page opens
2. Select **Home > Assign Lot No.**
The lot number is assigned to the quantity entered in the **Quantity to Receive**.
3. Select **Close**.

When you perform an underdelivery on a **Purchase Order** or **Warehouse Receipt** by changing the value in the **Qty. to Receive** field on the **Lines** FastTab with a quantity less than the original and then select the **Underdelivery** checkbox, the value is updated in the **Quantity (Base)** and **Qty. to Handle (Base)** fields on the **Item Tracking Lines** page. You can perform this action when there is only one item tracking line. In case there are multiple tracking lines, an error will occur while changing the value in the **Qty. to Receive** field.

Post warehouse receipt

1. On the action bar, select **Posting > Post Receipt** on the **Warehouse Receipt** page.
2. Click **Yes** in the confirmation dialog box, "Do you want to post the receipt?"
3. Click **OK** in the information dialog box.



Note


The system displays a confirmation message for each line when posting a warehouse shipment involving license plate-tracked items with underdelivery. After confirmation, the system proceeds to post the shipment.



Show quantity in order

In the order, you can see whether underdelivery has taken place. In the description below, an example is given of showing the quantity in a purchase order.



1. Select the Search icon , select **Purchase Orders**, and then choose the related link.

The **Purchase Orders** list page opens.

2. Select the desired **No.**

The **Purchase Order** page opens.

After posting an order containing an underdelivery, the Quantity remains equal to the originally entered quantity. In a receipt document, the **Receipt Variance** field shows the difference between the Quantity Received and the Quantity, if it is a sales document, the field name is **Shipment Variance**.

When you partially post the purchase order and the **Underdelivery** checkbox is selected in the purchase order line, the system automatically deletes the related warehouse receipts and inventory put-aways. This also updates the **Underdelivery** checkbox and **Receipt Variance** field on the associated posted purchase receipt, posted warehouse receipt, and posted inventory put-away documents.

After posting a warehouse document with underdelivery, the **Underdelivery** checkbox is selected in the order. If a new warehouse document must be created, due to an extra receipt, it is necessary to clear the **Underdelivery** checkbox so that the quantity to receive/ship is automatically filled with the outstanding quantity. After this, the order must be released again. From that moment, a new warehouse document can be created.

When a purchase order or sales order is under-delivered and no outstanding quantity remains, direct invoice posting is not permitted if a prepayment amount is still open. In this case, the invoice must be created manually based on the received or shipped quantities. After the invoice is posted, the remaining prepayment amount can be cleared by posting a prepayment credit memo from the order. The order cannot be deleted until all prepayment amounts are fully cleared.

Note

If an under-delivery results in a remaining prepayment amount, the system displays an error message and does not allow the purchase order or sales order to be invoiced directly. The remaining prepayment must be cleared by posting an invoice using the corresponding receipt or shipment lines, followed by posting the prepayment credit memo.



 Note

If the **Skip Under Delivery Prepayment Error Check** toggle is turned on, the under-delivery error for purchase orders and sales orders will be bypassed.



Post document with zero quantity

Article • 4/3/2023 • 1 min read

You can post a warehouse shipment/receipt or register a pick document with zero quantity when underdelivery is enabled and Allowed Underdelivery % is set to 100.

When you post a warehouse shipment/receipt or register a pick with zero quantity and enable underdelivery and there is only one shipment/receipt/pick line, the system deletes the document. When multiple warehouse shipment/receipt/pick lines exist, the system deletes the line(s) with zero quantity. The outstanding quantity is automatically set to zero on successful posting.



Set outstanding lines to underdelivery

Article • 4/3/2023 • 1 min read

Instead of manually selecting the **Underdelivery** field for each line on the warehouse shipment/receipt or purchase/sales order, you can use the **Set Outstanding Lines to Underdelivery** action to automatically update the relevant fields on valid lines.

Underdelivery is determined by the following formula:

- For warehouse shipments and sales orders, if $Quantity > Qty. to Ship + Qty. Shipped$
- For warehouse receipts and purchase orders, if $Quantity > Qty. to Receive + Qty. Received$
- On the **Warehouse Shipment/Receipt** or **Purchase/Sales Order** page, go to **Home > Set Outstanding Lines to Underdelivery**.
- Select **Yes** on the dialog which appears.

If the **Required Underdelivery Reason Code** toggle is turned on for the customer, a dialog will ask you to select an OUD Reason Code for all lines without a code.

The **Underdelivery** field is selected on all valid lines which are displayed. Any lines that are hidden by filters will not be updated by this action.

If no applicable lines are found, a message will indicate that "No valid lines exist for this action to work."

Note

By default, the [Allowed % Underdelivery](#) value is ignored. You can choose to respect this value by [enabling it in the setup](#).



Integrations

Article • 3/25/2026 • 1 min read

The Aptean Over Under Delivery extension has been integrated with the following extensions:

- [Aptean EDI](#)
- [Aptean Packaging](#)
- [Aptean Drop Shipment](#)
- [Aptean Catch Weight](#)
- [Aptean Combine Shipments per Period](#)



Aptean EDI

Article • 2/27/2025 • 1 min read

When the Aptean Over Under Delivery extension is used in conjunction with the Aptean [EDI](#) extension, the system automatically selects the **Under Delivery** checkbox in the warehouse shipment lines if the shipped quantity is less than the order quantity. This happens after processing the inbound file through Aptean EDI 945, Aptean EDI 945 Inventory Pick, Aptean EDI 945 Level 4, and Aptean EDI 945 Sales Order ports.



Aptean Drop Shipment

Article • 11/26/2025 • 1 min read

When the Aptean Over Under Delivery extension is used in conjunction with the Aptean [Drop Shipment](#) extension, the over and under delivery tolerances configured for an item are automatically applied to the related drop shipment documents.



Aptean Catch Weight

Article • 3/25/2026 • 1 min read

When the Aptean Over and Under Delivery extension is used in conjunction with the Aptean [Catch Weight](#) extension, the system recalculates the **Prepmt. Line Amount** field for catch weight items based on the actual weight quantity received or shipped when quantities are over-delivered or under-delivered compared to the original order quantity.



Aptean Combine Shipments per Period

Article • 3/25/2026 • 1 min read

When the Aptean Over and Under Delivery extension is used in conjunction with the Aptean [Combine Shipments per Period](#) extension, the system throws an error for over-delivered shipment lines if the extra prepayment invoice is not posted when creating a consolidated sales invoice via the **Combine Shipment By** page.



Known issues

Article • 3/25/2026 • 1 min read

The table below lists known issues identified across releases. We are actively investigating and resolving them as part of our commitment to continuous improvement.

ID	Description	Status	Found in version	Fixed in version
349188	The system incorrectly updates the Prepmt Line Amount Excl. VAT field value on the Sales Order page by reflecting only invoice discount changes instead of recalculating the value based on the Prepayment % field.	Under investigation	2601.0.0.0	
365459	The system throws an Error when posting a second prepayment invoice with multiple lines in a combination of Over and Under Delivery for Purchase/Sales line scenarios	Under investigation	2601.0.0.0	

