

User Manual

Aptean Food and Beverage ERP

Production Family Profile

Product Documentation



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Release notes

Article • 5/27/2026 • 1 min read

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

Date	Release version	Description
May 2026	2501.3.0.0	Minor release
February 2026	2501.2.0.0	Stability release
January 2026	2501.1.0.0	Stability release
July 2025	2501.0.0.0	Feature release
May 2025	2301.5.0.0	Stability release
March 2025	2301.4.0.0	Stability release
August 2024	2301.3.0.0	Stability release
June 2024	2301.2.0.0	Stability release
March 2024	2301.1.0.0	Stability release
November 2023	2301.0.0.0	Initial release



2501.3.0.0

Release Note • 5/27/2026 • 1 min read

Enhancements/Modifications

With this release of the Aptean Production Family Profile extension, you can use new options to calculate production order line quantities and component requirements when using family profiles.

With this enhancement, you can:

- Choose between two quantity methods for calculating production order line quantities: **Output %** and **Qty. per Family**. For more information, see [Create production document with family](#).
- Define editable component quantities on the **Family** page to accurately represent input requirements. For more information, see [Create family Component lines](#).
- Select a routing assignment method to control how routing references are shared across production order lines. For more information, see [Create a family profile](#).
- Configure company-wide default values for new family profiles using the **Production Family Profiles Setup** page. For more information, see [Production Family Profiles Setup](#).

UI/UX changes

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

- The **Production Family Profiles Setup** page has been added.
- The **Quantity Method** and **Routing Assignment** fields have been added to the **Family Profile** page.
- The **Quantity Method** and **Routing Assignment** fields have been added to the **Family Profile** list page as hidden columns.



2501.2.0.0

Release Note • 2/25/2026 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
343077	An error occurs on the Released Production Order page when using a family that has a Sort Order field value as <i>0</i> on the Family Profile page . This issue results in the production order line being inserted with a Line No. field value as <i>0</i> .



2501.1.0.0

Release Note • 1/28/2026 • 1 min read

Enhancements/Modifications

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



2501.0.0.0

Release Note • 7/30/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
309885	The system applies the incorrect trade plan rate when global lot attribute values are specified for an item on a released production order. This issue occurs when the item is inherited from the Family Profile page and the Aptean Trade Management and Aptean Advanced Attributes extensions are installed.



2301.5.0.0

Release Note • 5/7/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Production Family Profile extension, the translation file for the Polish (pl-PL) language has been added.



2301.4.0.0

Release Note • 3/26/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
266805	The system incorrectly updates the values in the Starting Date-Time and Ending Date-Time fields on the Schedule FastTab of the Released Production Order page when executing the Refresh Production Order action. This issue occurs when the Source Type field value is set to <i>Item</i> on the Released Production Order page.



2301.3.0.0

Release Note • 8/21/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Production Family Profile 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.



2301.2.0.0

Release Note • 6/27/2024 • 1 min read

Enhancements/Modifications

The translation files for the following languages have been updated with standard texts for better readability.

- Dutch (nl-NL)
- Swedish (sv-SE)



2301.1.0.0

Release Note • 3/20/2024 • 1 min read

Enhancements/Modifications

Modifications were made for this extension to accommodate the changes in the Aptean [Advanced Attributes](#) extension. To know more, see [Release Notes](#) of version 2402.2.0.0.



2301.0.0.0

Release Note • 11/8/2023 • 1 min read

Features

With the features added in this release of the Aptean Production Family Profile extension, you can:

- Create family profile and assign it to an existing family. For more information, see [Create a family profile](#) and [Create family profile assignment](#).
- Use the source type as *Family* to create a Production Order.
- Copy the Items on the Family **Component Lines** to the Family **Profile Component Lines**.
- Add attributes to the items added on the Lines and Component Lines on the Family and Family Profile pages. For more information, see [Aptean Advanced Attributes integration into families](#).
- Create production document with attributes in Families.



Introduction

Article • 11/8/2023 • 1 min read

The Aptean Production Family Profile (PFP) extension offers a structured approach to handling your products and services for effective inventory management. By leveraging families, you can efficiently organize, analyze, and control their product offerings, leading to more effective decision-making and streamlined operational processes. Grouping products into families further enables you to efficiently manage a range of products that have similar properties or are part of a broader category.

You can use families to determine the expected outputs from graded raw materials. The associated family profiles determine the ratios that emerge from the production process, that can be changed over the seasons. For example, when a grading process expects that the output for ungraded lemon will result in three types:

- Lemon 1
- Lemon 2
- Waste

The family record would reflect the result along with the share of raw material and capacity costs for each type of Lemon.

When you create grading production documents in Dynamic 365 Business Central, other than Item or Sales Header you can choose the Source Type as *Family*.



Setup

Article • 12/23/2024 • 1 min read

The following setup is required.

- [Manage permission sets](#)



Manage permission sets

Article • 12/23/2024 • 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 *PRODFAMILYPROF98FDW*.

Indirect permission sets

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

The indirect permission set ID for this extension is *PRODFAPROFBASIC98FDW*.

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 Production Family Profile extension, ensuring secure and role-based access.



Set up production family profiles

Article • 5/27/2026 • 1 min read

The **Production Family Profiles Setup** page allows you to configure company-wide default values that are applied when new family profile records are created. This ensures consistent configuration without requiring manual selection on every profile.

To configure the setup:

1. Select the Search icon, enter **Production Family Profiles Setup**, and then choose the related link.
2. On the **Production Family Profiles Setup** page, enter the required information in the following fields.

Field	Description
Default Quantity Method	Specifies the default quantity method assigned to new family profiles. Options: Output % or Qty. per Family
Default Routing Assignment	Specifies the default routing assignment method for new family profiles. Options: Per Line or Shared

 **Note**

If the setup page is not configured, the system uses backward-compatible defaults: Output % for the quantity method and Per Line for the routing assignment.



Create a family profile

Article • 5/27/2026 • 2 min read

You can set up a family profile to view, create, and edit the family profile records and the related lines. You cannot make any changes in the Family or Family Profiles when the Family is certified. To learn more about creating a Family, see [Create a family](#).

Follow the below steps to create a **Family Profile**:

1. On the **Family** page, on the action bar, choose **Actions > Family Profiles**.
2. On the **Family Profile** list page, fill in the required fields.
Choose the required **Family No.** (a code field containing alpha or alphanumeric values) to access the **Family Profile Card** page. Alternatively, choose **Edit** on the action bar to open the **Family Profile Card** page.
3. On the **Family Profile Card** page, on the **Lines** FastTab, in the **Output %** field, enter a value.
The **Output %** for each item can only be 0 or greater and the sum of **Output %** of all items must be equal to 100. You cannot turn on the **Certified** toggle before the sum of **Output %** is 100.

Note

When the **Output %** is 0, the **Block for Production** checkbox is selected by default. You can also change the **Sort Order** of the Item on the **Lines** FastTab by choosing the **Move Up** and **Move Down** buttons.

When you delete or rename a Family Profile, it will perform the same action for all the associated records.

Routing Assignment

On the **Routing Assignment** field, select **Per Line** to assign each production order line a routing reference number equal to its own line number.

Select **Shared** if you want all production order lines to share a single routing reference, in which case the routing reference number is set to 0.

Note

The **Quantity Method** and **Routing Assignment** fields are also available on the **Family Profile** list page as a hidden column. You can add it to the list view using personalization.



Create family component lines

Article • 5/27/2026 • 2 min read

You can add items to the **Component Lines** FastTab on the **Family** page. Follow the below steps to create the family component lines:

- 1. On the **Component Lines** FastTab, in the **Item No.** field, choose an item.
- 2. Follow the process to add multiple items to the Family Profile Component Lines.

You can add, delete, or modify the family lines with associated profiles. The following process occurs once you choose one of the actions:

Action	Process
Add family lines	When you accept the confirmation message, all linked profiles are uncertified and then the new family lines get added. When the process is complete, you can certify all the profiles.
Delete family lines	When you accept the confirmation message, all linked profiles are uncertified and then the family lines get removed from every profile. When the process is complete, you can certify all the profiles.
Modify family lines	After accepting the confirmation message, all linked profiles are uncertified and then the family lines get modified in every profile. When the process is complete, you can certify all the profiles.

ⓘ Note

When you delete a family with associated profiles, all the linked profiles are uncertified and then deleted along with all the associated records.

- 3. When you create family component lines, the **Quantity** field is editable and accepts decimal values. This allows you to define precise input requirements per component for the family profile.



Create family profile component lines

Article • 11/8/2023 • 1 min read

Follow the below steps to create the family profile component lines:

- 1. On the **Profile Component Lines** FastTab, in the **Item No.** field, choose an item.
- 2. Follow the process to add multiple items to the Family Profile Component Lines.

 **Note**

To directly copy the items from the **Family Component Line** to the **Family Profile Component Line** FastTab, select **Actions > Copy** on the **Family Profile** page.

You can delete or rename the family profiles. The following process occurs once you choose one of the actions:

Action	Process
Delete a Profile	When you delete a Family Profile, the associated profile lines, profile component lines, and profile assignments will be deleted.
Rename a Profile	When you rename a Family Profile, the linked records including profile lines, profile component lines, and profile assignments are renamed.



Create family profile assignment

Article • 11/8/2023 • 1 min read

The Family Profile Assignment page enables you to make a family profile active and enable it for a due date.

Follow the below steps to create a family profile assignment:

1. On the **Family** page, on the action bar, choose **Actions** > **Family Profile Assignments**.
2. On the **Family Profile Assignments** list page, in the **Date From** field, choose a valid date.
3. In the **Profile Code** field, choose a Family.



Create production document with family

Article • 5/27/2026 • 5 min read

While creating a production document, you can choose the Source Type as Family. Prior to creating the production document, turn on the **Certified** toggle on the **Family Profile** and **Family** pages.

Follow the below steps to create a Released Production Order with Family:

1. Select the Search icon , enter **Released Production Orders**, and then choose the related link.
2. On the **Released Production Orders** list page, choose **New** on the action bar.
3. On the **Released Production Order** page, on the **General** FastTab, fill in the required fields.
4. In the **Source Type** field, choose *Family*.
5. In the **Source No.** field, choose a certified **Family** that gets displayed.
6. On the action bar, choose **Home > Refresh Production Order**.

The following checks occur before the Production Order lines get created:

Checks	Production Order Lines
Family has no assigned profiles or, Family has profiles, but none are assigned	The Family Lines will be created.
Family has profiles and an assigned date	The Items from the profile are retrieved and reflected.

The Items are listed on the **Lines** FastTab in ascending order based on the **Sort Order** specified on the **Lines** FastTab on the **Family Profile** page.

! Note

When you assign a due date to a **Family Profile**, it is selected and will be active till the assigned date from the date of creation.

The quantities of the Items on the **Lines** FastTab are based on the **Output %** on the **Lines** FastTab of the **Family Profile** page.

The equation for the above calculation works as follows:

If the Quantity = 120 (B) in the Released Production Order and the Output% for Items on Family Profile for a Family are as follows:

- Item 01, Output % 60 (A1), sort order 2
- Item 02, Output % 30 (A2), sort order 1



- Item 03, Output % 10 (A3), sort order 3

Formula: $(C) = (B) * (Ax) / 100$

Qty. per Family

This method allows the user to specify the number of family runs on the production order header. Each family profile line defines a fixed output quantity per run using the **Qty. per Family** field on the **Lines** FastTab of the **Family Profile Card** page.

The quantities of the Items on the **Lines** FastTab are based on the **Qty. per Family** value.

The equation for the above calculation works as follows:

If the Quantity = 10 (B) in the Released Production Order (representing the number of family runs) and the **Qty. per Family** for Items on the **Family Profile** page for a family are as follows:

- Item 01, Qty. per Family 1 (A1), Unit of Measure BOX, Sort Order 2
- Item 02, Qty. per Family 6 (A2), Unit of Measure BAG, Sort Order 1
- Item 03, Qty. per Family 2 (A3), Unit of Measure LBS, Sort Order 3

Formula: $(C) = (B) \times (Ax)$

Item	Qty. per Family (Ax)	No. of Family Runs (B)	Line Quantity (C)	Unit of Measure
Item 01	1	10	10	BOX
Item 02	6	10	60	BAG
Item 03	2	10	20	LBS

Note

Unlike the **Output %** method, the **Qty. per Family** method does not require all lines to use the same unit of measure. Each line can have an independent unit of measure code, enabling mixed-UOM output families. Each non-blocked line must have a **Qty. per Family** value greater than 0 before the profile can be certified.

Production order line quantity warning

When manually edit the **Quantity** field value on any production order line, the grossed-up component quantity may become inaccurate, and cost reallocation performed by the Aptean Production Cost Apportionment extension at order finish may be based on incorrect proportions.



To prevent this, the system displays a warning message when you change the **Quantity** field value on the production order line if any production order component in the same order has cost apportionment enabled. The warning does not block the change, it informs you of the potential impact on cost reallocation.

Note

This warning only appears when the Aptean Production Cost Apportionment extension is installed and at least one component on the production order has cost apportionment enabled. If the extension is not installed, no warning is shown.



Create production document component lines

Article • 11/8/2023 • 1 min read

When the Component Lines exist for a production document, it is created on the first Production Line. You can find the same on the **Lines** FastTab, by choosing **Line > Components**.

Once you create the production document, the **Production Component Lines** are created based on the following checks:

Checks	Actions
If the Family Profile matches with the assigned due date on the production document	The existing Family Profile Component Lines for the selected profile will reflect on the Production Order Component lines.
When the Family Profile Component Line doesn't exist	The existing Family Component Lines will reflect on the Production Order Component lines.

To learn more about **Production Order Component** lines, see [Component lines of the production order](#).



Aptean Advanced Attributes integration into families

Article • 11/8/2023 • 2 min read

You can add attributes into the Family Lines, Family Component Lines, Family Profile Lines, and Family Profile Component Lines. This can be done by using the Aptean Production Family Profile extension in conjunction with the Aptean [Advanced Attributes](#) extension.

Attributes in families

The integration with the Aptean Advanced Attributes extension enables you to create Family Lines with lot attributes. The integration further allows you to create the Family **Component Lines** with lot attributes. To learn more about lot attributes, see [Lot attributes](#).

Attributes in family profiles

The Aptean Advanced Attributes extension is integrated with **Family Profiles**. This integration copies the lot attributes in the Family **Lines** to the Family Profile **Lines**. The integration also enables you to add lot attributes to the items on the Family Profile **Component Lines**.

The items and the attributes added to the Family Component Lines and Family Profile Component Lines appear on the **Components-Lot Attribute Requirements** FactBox of the respective pages. To learn more, see [Editable FactBox](#).

Attributes in families with production document

When you install Aptean Advanced Attributes extension, you can create a Production Order through Family in the output and components by integrating the lot attributes.

To learn more about assigning lot attributes on the production documents, see [Assign lot attribute to the production document](#).

