

User Manual

Aptean Food and

Beverage ERP

Inventory Overview

Product Documentation



Contents

Release notes	.....
2505.3.0.0	.....
2505.2.0.0	.....
2505.1.0.0	.....
2505.0.0.0	.....
2504.1.0.0	.....
2504.0.0.0	.....
2503.0.0.0	.....
2502.7.0.0	.....
2502.6.0.0	.....
2502.5.0.0	.....
2502.4.0.0	.....
2502.3.0.0	.....
2502.2.0.0	.....
2502.1.0.0	.....
2502.0.0.0	.....
2501.0.0.0	.....
2404.1.0.0	.....
2404.0.0.0	.....
2403.1.0.0	.....
2403.0.0.0	.....
2402.0.0.0	.....
2401.8.0.0	.....
2401.7.0.0	.....
2401.6.0.0	.....
2401.5.0.0	.....
2401.4.0.0	.....
2401.3.0.0	.....
2401.2.0.0	.....
2401.1.0.0	.....
2401.0.0.0	.....
2304.4.0.0	.....



Inventory Overview

2304.3.0.0	.....
2304.2.0.0	.....
2304.1.0.0	.....
2304.0.0.0	.....
2303.0.0.0	.....
2302.1.0.0	.....
2302.0.0.0	.....
2301.3.0.0	.....
2301.2.0.0	.....
2301.1.0.0	.....
1.5.112266.0	.....
1.4.110828.0	.....
1.4.110401.0	.....
1.3.107321.0	.....
1.2.96595.0	.....
1.2.95403.0	.....
1.1.68981.0	.....
1.0.57497.0	.....
1.0.56363.0	.....
Introduction	.....
Setup	.....
Manage permission sets	.....
Manage the Inventory overview page	.....
Inventory projected availability setup	.....
Inventory projected availability	.....
Accessing the trading board	.....
Access the item inventory overview	.....
Cut functionality in sales order	.....
Redistribution worksheet	.....
Integrations	.....
Aptean Essentials	.....
Aptean Protein Essentials	.....
Aptean POD Integration Connector	.....
Aptean Service Provisioning	.....



Release notes

Article • 11/26/2025 • 2 min read

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

Date	Release version	Description
November 2025	2505.3.0.0	Stability release
October 2025	2505.2.0.0	Stability release
August 2025	2505.1.0.0	Platform release
July 2025	2505.0.0.0	Feature release
July 2025	2504.1.0.0	Stability release
July 2025	2504.0.0.0	Feature release
July 2025	2503.0.0.0	Feature release
June 2025	2502.7.0.0	Stability release
May 2025	2502.6.0.0	Stability release
May 2025	2502.5.0.0	Stability release
February 2025	2502.4.0.0	Stability release
February 2025	2502.3.0.0	Stability release
February 2025	2502.2.0.0	Stability release
January 2025	2502.1.0.0	Stability release
January 2025	2502.0.0.0	Feature release
January 2025	2501.0.0.0	Feature release
December 2024	2404.1.0.0	Stability release
November 2024	2404.0.0.0	Feature release
November 2024	2403.1.0.0	Stability release
November 2024	2403.0.0.0	Feature release



Inventory Overview

October 2024	2402.0.0.0	Feature release
October 2024	2401.8.0.0	Stability release
September 2024	2401.7.0.0	Stability release
August 2024	2401.6.0.0	Stability release
August 2024	2401.5.0.0	Stability release
August 2024	2401.4.0.0	Stability release
July 2024	2401.3.0.0	Stability release
May 2024	2401.2.0.0	Stability release
April 2024	2401.1.0.0	Stability release
April 2024	2401.0.0.0	Feature release
March 2024	2304.4.0.0	Stability release
March 2024	2304.3.0.0	Stability release
February 2024	2304.2.0.0	Stability release
December 2023	2304.1.0.0	Stability release
December 2023	2304.0.0.0	Feature release
December 2023	2303.0.0.0	Feature release
December 2023	2302.1.0.0	Stability release
December 2023	2302.1.0.0	Stability release
November 2023	2302.0.0.0	Feature release
October 2023	2301.3.0.0	Stability release
October 2023	2301.2.0.0	Stability release
October 2023	2301.1.0.0	Stability release
August 2023	1.5.112266.0	Stability release
July 2023	1.4.110828.0	Stability release
July 2023	1.4.110401.0	Feature release



Inventory Overview

July 2023	1.3.107321.0	Stability release
May 2023	1.2.96595.0	Stability release
April 2023	1.2.95403.0	Stability release
December 2022	1.1.68981.0	Stability release
August 2022	1.0.57497.0	Stability release
August 2022	1.0.56363.0	Initial release



2505.3.0.0

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

Enhancements/Modifications

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



2505.2.0.0

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

Enhancements/Modifications

With this release of the Aptean Inventory Overview extension, the vendor related information has been removed from the **Inventory Overview** page, ensuring consistency and improving overall user experience. This enhancement addresses the issue reported in bug ID #330429.

UI/UX changes

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

- The **Vendor Filter** field has been removed from the **General** FastTab of the **Inventory Overview** page.
- The **Vendor No.** and **Vendor Name** fields have been removed from the **Inventory Overview** page.
- The **Vendor Details** group has been removed from the FactBox on the **Inventory Overview** page.

Resolved issues

The following issues have been resolved in this release.

ID	Description
311164	An error occurs when attempting to create or release a sales order. Additionally, an error occurs when accessing previously created sales orders.
330429	A performance issue occurs when updating the warehouse location on the Inventory Overview page. This issue arises due to code related defects in the vendor related fields on the Inventory Overview page.



2505.1.0.0

Release Note • 8/27/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Inventory Overview extension, the *ItemUOMInformationFactbox65FDW* page and all its dependencies (extensions, permissions, and translations) have been removed as part of a code cleanup activity.



2505.0.0.0

Release Note • 7/30/2025 • 1 min read

Features

With the feature added in this release, you can use the **Item Purchaser Filter** field to filter items based on item purchasers on the **Inventory Overview** page. For more information, see [Manage the Inventory Overview page](#). Further, you must install the Aptean [Essentials](#) extension to use the Aptean Inventory Overview extension.

Integrations

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

UI/UX changes

The **Item Purchaser Filter** field has been added to the **General** FastTab of the **Inventory Overview** page.



2504.1.0.0

Release Note • 7/30/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
305798	The system fails to display the Vendor No. and Vendor Name field values on the Inventory Overview page when the license plates are moved between bins.



2504.0.0.0

Release Note • 7/30/2025 • 1 min read

Features

With the feature added in this release of the Aptean Inventory Overview extension, you can filter items based on their service provisioning type on the **Inventory Overview** page. Additionally, you can transfer the ownership by shipping items to third-party customers and receiving items from third-party vendors. For more information, see [Integration with Aptean Service Provisioning](#).

Note

This feature is available only when the Aptean [Service Provisioning](#) extension is installed.

Integrations

The Aptean Inventory Overview extension has been integrated with the Aptean [Service Provisioning](#) extension. For more information, see [Integrations](#).

UI/UX changes

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

- The **Transfer Ownership** field has been added to the **Inventory Overview** page.
- The **Service Provisioning Filter** field has been added to the **General** FastTab of the **Inventory Overview** page.
- The **Service Provisioning Type** field has been added to the **Inventory Details – Quantity** FactBox of the **Inventory Overview** page.

Note

These fields are visible only when the Aptean [Service Provisioning](#) extension is installed.



2503.0.0.0

Release Note • 7/2/2025 • 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 [Highlights of POD Integration Connector, version 2501.0.0.0](#).

Integrations

The Aptean Inventory Overview extension has been integrated with the Aptean [POD Integration Connector](#). To know more, see [Integrations](#).



2502.7.0.0

Release Note • 6/4/2025 • 1 min read

Resolved issues

The following issues have been resolved in this release.

ID	Description
284152	The system incorrectly updates the Expected field value on the Inventory Projected Availability page. This issue occurs because the system uses the Quantity field value instead of the Remaining Quantity field value on the Released Production Orders page, and the Quantity field value instead of the Quantity to Assemble field value on the Assembly Order page when calculating the expected availability.
287545	The system incorrectly displays values in the Vendor No. and Vendor Name fields for items that are not linked to any vendor on the Inventory Overview page. This issue occurs when the Post action is executed on the Item Journals page.



2502.6.0.0

Release Note • 5/21/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
291531	The system incorrectly copies the Vendor and Purchase Receipt No. fields values on the Inventory Overview page from the first record when these fields values are blank. This issue occurs upon executing the Refresh Overview action on the Inventory Overview page.



2502.5.0.0

Release Note • 5/12/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Inventory Overview extension,

- The translation file for the Chinese (zh-CN) language has been added.
- The translation file for the Swedish (sv-SE) language has been updated for better readability.



2502.4.0.0

Release Note • 2/26/2025 • 1 min read

Resolved issues

The following issues have been resolved in this release.

ID	Description
260368	The system fails to update the vendor information for the entries on the Inventory Overview page.
259618	The system incorrectly displays the Gross/Committed Requirement field value on the Inventory Projected Availability page by including inventory quantities from finished production orders.



2502.3.0.0

Release Note • 2/12/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Inventory Overview extension, the system retrieves the expiration date from the **Lot No. Information Card** page instead of the warehouse entries to enhance the performance of the **Inventory Overview** page.



2502.2.0.0

Release Note • 2/6/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Inventory Overview extension, you can track items when their availability is below the safety stock level by turning on the **Over Committed By Safety Stock** toggle on the **Inventory Projected Availability** page. To know more, see [Inventory projected availability setup](#).

Note

- You can turn on the **Over Committed By Safety Stock** toggle only when the **Overcommitted Only** toggle is turned on.
- When running the **Inventory Projected Availability** report with the **Group by Location** and **Overcommitted Compared to Safety Stock** toggles turned on, the system displays item/location lines only if available inventory falls below the safety stock quantity in the SKU settings. If the SKU setting is empty or doesn't exist, the system compares the available inventory to the safety stock quantity in the item settings.

UI/UX changes

The **Over Committed By Safety Stock** toggle and the **Safety Stock Quantity** field have been added to the **Inventory Projected Availability** page.



2502.1.0.0

Release Note • 1/27/2025 • 1 min read

Enhancements/Modifications

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



2502.0.0.0

Release Note • 1/23/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Inventory Overview extension, the **Item Details - Quantity** FactBox on the **Item Units of Measure** page has been removed from this extension and added to the Aptean Standard Measurements extension, where it has been renamed to **Item UOM Information**. To know more, see [Highlights of Standard Measurements, version 2501.0.0.0](#).

UI/UX changes

The **Item Details - Quantity** FactBox has been removed from the **Item Units of Measure** page.



2501.0.0.0

Release Note • 1/6/2025 • 1 min read

Enhancements/Modifications

With this release, the Aptean Inventory Overview extension has been updated to display only the most recent expiration date and its associated **Quantity** field value on the **Inventory Overview** page when you execute the **Change Expiration Date** action on the **Lot No. Information Card** page.



2404.1.0.0

Release Note • 12/24/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
256657	The system incorrectly opens the License Plate No. Information Card page instead of the License Plate Card page when a license plate number is selected on the Inventory Overview page.



2404.0.0.0

Release Note • 11/29/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Inventory Overview extension, you can manage and filter inventory data by license plates and apply the license plate filter according to the feature control settings. To know more, see [What's new in Advanced Warehouse Management, version 2407.0.0.0](#).

Integrations

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



2403.1.0.0

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

Enhancements/Modifications

With this release of the Aptean Inventory Overview extension, the system has been optimized to enhance the performance of the **InventoryOverview65FDW** report. The filtering procedures are executed more efficiently when the lot number and location filters are not applied. These improvements result in faster report generation, reduced database load, and more responsive experience when working with the report. This enhancement addresses the issue reported in bug ID #244097.



2403.0.0.0

Release Note • 11/5/2024 • 1 min read

Enhancements/Modifications

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



2402.0.0.0

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

Enhancements/Modifications

With this release of the Aptean Inventory Overview extension, you can execute the **Refresh Overview** action on the **Inventory Overview** page only when any one of the filter fields has a value. If no filters are selected, the system prompts you to choose at least one filter before refreshing.



2401.8.0.0

Release Note • 10/22/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
239754	A performance issue occurs when executing the Refresh Overview action on the Inventory Overview page, leading to extended loading times.



2401.7.0.0

Release Note • 9/4/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
224686	An error occurs when entering a letter followed by an asterisk (*) in the Bin Filter field on the General FastTab of the Inventory Overview page. This issue arises if any location code on the Locations page begins with the specified letter.



2401.6.0.0

Release Note • 8/21/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Inventory Overview extension, modifications have been made to accommodate the following changes:

- Procedures have been added to the *Upgrade* codeunit to automatically assign the necessary basic permission sets to all users and groups, enhancing the efficiency of permission management. This automation streamlines the installation and upgrade processes by reducing the manual configuration, thereby improving security and overall efficiency in the deployment of the extension.

 Note

This release has been implemented in correlation with the enhancement made in version [2401.2.0.0](#).

- 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.



2401.5.0.0

Release Note • 8/19/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Inventory Overview extension, you can:

- View additional vendor details on the **Vendor Details** FactBox. When selecting a value in the **Item Filter** field, the FactBox displays the **Vendor No.**, **Vendor Name**, and **Buy-from Address** field information, which is retrieved from the related purchase order.
- Select a vendor number in the **Vendor Filter** field on the **Inventory Projected Availability** page. The **Vendor Number** filter displays only the corresponding records when a specific vendor number is applied. If this field is left blank, no filtering is applied, allowing all records to be shown.
- View a **Item Description** column on the **Inventory Projected Availability** page. This column has been added to provide a quick link to the filtered item list.

UI/UX changes

The **Vendor Details** FactBox, **Item Description** column and **Vendor Filter** field have been added on the **Inventory Projected Availability** page.



2401.4.0.0

Release Note • 8/6/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
222936	A timeout error occurs while updating the Aptean Inventory Overview extension.



2401.3.0.0

Release Note • 7/11/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
212978	The system does not function as expected when both the Aptean Beverage extensions and Aptean Inventory Overview extension are installed. This issue arises upon executing the Cut Order Quantity action on the Lines FastTab of the Sales Order page.



2401.2.0.0

Release Note • 5/27/2024 • 1 min read

Enhancements/Modifications

Modifications were made for the Aptean Inventory Overview extension to accommodate the following changes:

- Procedures were 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 were 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 were 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 was modified to use centralized license management procedures, further reducing the need for application-specific adjustments.



2401.1.0.0

Release Note • 4/30/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
196790	Performance issue occurs on the Inventory Overview page while opening the Sales Order Subform page.



2401.0.0.0

Release Note • 4/30/2024 • 1 min read

Features

With this release of the Aptean Inventory Overview extension, you can filter inventory availability by week and include forecast and requisition lines for better inventory management.

UI/UX changes

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

- The **Inventory Projected Availability** action is added to the **Planning Worksheets** and **Requisition Worksheets** pages.
- The **Period Type** and **Period Projected** fields are added to the **Projection Selection** FastTab of the **Inventory Projected Availability** page.
- The **Include Period Projection Columns**, **Only Show Period Availability Projection**, **Include Requisition Lines** and **Include Demand Production Forecast Entries** toggles and the **Demand Forecast Name**, **Include Forecast starting from Period Projected** fields are added to the **Other Options** FastTab of the **Inventory Projected Availability** page.
- The **Availability Date** field is added to the **Inventory Document Type** page.
- The **Include Daily Projection Columns** toggle is removed from the **Other Options** FastTab of the **Inventory Projected Availability** page.



2304.4.0.0

Release Note • 3/20/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
184102	The Gross/Committed Requirement and Expected fields on the Inventory Projected Availability page are incorrectly updated after posting the Transfer Order with the transit location for Ship and Receive.



2304.3.0.0

Release Note • 3/6/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
176790	When the Method is set to <i>Equally</i> or <i>Proportionally</i> on the Allocate Dialog card page, the dialogue box on the Redistribution Worksheet page displayed an incorrect quantity when the Allocate action for a New Order Quantity with the Locked checkbox selected was executed.



2304.2.0.0

Release Note • 2/21/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
177286	After performing the Next Column action, the Available flow field on the Inventory Projected Availability page fails to present the details of associated documents on the Inventory Document Type page.



2304.1.0.0

Release Note • 12/27/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
165814	While receiving a Purchase Order or shipping a Sales Order without creating an Invoice, the Gross/Committed Requirement and Expected fields do not get updated on the Inventory Projected Availability page.

165814|While receiving a Purchase Order or shipping a Sales Order without creating an Invoice, the **Gross/Committed Requirement** and **Expected** fields do not get updated on the **Inventory Projected Availability** page.|



2304.0.0.0

Release Note • 12/27/2023 • 1 min read

With the features added in this release of the Aptean Inventory Overview extension, you can:

- Set aside a specific quantity of items on the **Sales Order** page by using the Cut functionality. To know more, see [Cut functionality in Sales Order](#).
- Cut the order lines when falling short on inventories for an item on multiple Sales Orders. To know more, see [Redistribution Worksheet](#).

UI/UX changes

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

- The **Cut Reason Code Required** toggle and **Default Cut Reason Code** field are added on the **Sales & Receivables Setup** page.
- The **Redistribution Worksheet** function is added on the **Item** and the **Inventory Projected Availability** pages.



2303.0.0.0

Release Note • 12/27/2023 • 1 min read

Enhancements/Modifications

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



2302.1.0.0

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

Resolved issues

The following issue has been resolved in this release:

ID	Description
162541	Curated the Physical Inventory field caption and tooltip to remove erroneous spellings and for better readability.



2302.0.0.0

Release Note • 11/1/2023 • 1 min read

Features

With the features added in this release of the Aptean Inventory Overview extension, you can:

- Set up filters to search items to check their availability and projected availability. To learn more, see [Inventory projected availability setup](#).
- Search specific item or group of items to check their available and projected availability. To learn more about more, see [Inventory projected availability](#).
- Access the **Trading Board** page from the **Inventory Projected Availability** page. To learn more, see [Access the trading board](#).
- Access the item **Inventory Overview** page from the **Inventory Projected Availability** page. To learn more, see [Access the item inventory overview](#).



2301.3.0.0

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

Enhancements/Modifications

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



2301.2.0.0

Release Note • 10/12/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
151290	The Quantity field on the Inventory Overview page displays an incorrect value. Additionally, the response time is longer while executing the Refresh Overview function.



2301.1.0.0

Release Note • 10/3/2023 • 1 min read

Enhancements/Modifications

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



1.5.112266.0

Release Note • 8/9/2023 • 1 min read

Resolved issues

The following issues have been resolved in this release:

ID	Description
135350	<ul style="list-style-type: none">• An error occurs when loading the Inventory Overview page if an Item has multiple units of measure.• On the License Plate Overview page, items with multiple units of measure are not displayed.



1.4.110828.0

Release Note • 7/26/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
135656	It is possible to input random value in the Filter fields on the Inventory Overview page.



1.4.110401.0

Release Note • 7/26/2023 • 1 min read

Features

With the feature added in this release of the Aptean Inventory Overview extension, you can view the **Inventory Details- Quantity** FactBox on the **Inventory Overview** page is populated when a catch weight item is displayed based on the applied filters. The value of the **Quantity (KG)** field on the **Inventory Details- Quantity** FactBox is inherited from the Catch Weight Setup. For more information, see [Catch Weight](#).

UI/UX changes

The **Inventory Details – Quantity** FactBox is added on the **Inventory Overview** page. To know more, see [Inventory overview](#) page.



1.3.107321.0

Release Note • 7/6/2023 • 1 min read

Enhancements/Modifications

Added extensibility options to this extension to accommodate additional fields on the pages.



1.2.96595.0

Release Note • 5/8/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
98309	On refreshing the Inventory Overview page after posting the Item Journal, the system displays both positive and negative adjustments with expiration date.



1.2.95403.0

Release Note • 4/29/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
115326	The Bin Code field on the Inventory Overview page displays a code for inventory received at a location without bins instead of displaying a blank value.



1.1.68981.0

Release Note • 4/3/2023 • 1 min read

Resolved issues

The following issues have been resolved in this release:

ID	Description
85030	The Unit of Measure Filter field on the Inventory Overview page displays the Item Units of Measure table instead of the Units of Measure table.
69722	The string length in some fields on the Inventory Overview page does not match the Business Central and Aptean standards.



1.0.57497.0

Release Note • 4/3/2023 • 1 min read

Enhancements/Modifications

The name of the App is updated from Aptean Inventory Overview to Aptean Inventory Overview for Food and Beverage.



1.0.56363.0

Release Note • 4/3/2023 • 1 min read

Features

With the features added in this release of the Aptean Inventory Overview extension, you can:

- View the details of the current inventory and bins.
- Apply filters on the Inventory Overview page to see specific data.
- View the relationship between the base unit of measure and another(selected) unit of measure on the **Item Unit of Measure Information** FactBox. For more information, see [Item Unit of Measure Information](#).



Introduction

Article • 7/30/2025 • 1 min read

The Aptean Inventory Overview (IOV) extension enhances visibility and control over inventory by providing real-time data and projected inventory insights. You can trace lots, reallocate inventory, and prioritize orders to make faster, more informed decisions.

This extension includes **Inventory Overview**, **Inventory Projected Availability**, and **Redistribution Worksheet** pages that provides a comprehensive view of current inventory positions and projected availability based on open orders and forecasts. You can filter data, drill into transactions, and access key insights directly from pages like the **Item Card** or **Sales Lines** page.

The key benefits of using this extension are:

- Gain real-time visibility: Monitor current stock and projected availability.
- Make smarter allocation decisions: Identify where inventory is needed most and reallocate proactively to prevent stockouts, overcommitments, and lot-level availability gaps.
- Enable cross-functional collaboration: Provide procurement, planning, and operations teams shared access to inventory insights when they need them most.

Important

To use the Aptean Inventory Overview extension, the Aptean [Essentials](#) extension must be installed.



Setup

Article • 8/6/2024 • 1 min read

The following setup is required.

[Manage permission sets](#)



Manage permission sets

Article • 11/5/2024 • 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 *INVENTORYOVERVIEWFDW*.

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 *INVOVERVIEWBASICFDW*.

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 Inventory Overview extension, ensuring secure and role-based access.



Manage the Inventory overview page

Article • 7/30/2025 • 7 min read

You can open the **Inventory Overview** page in the following ways:



- Select the Search icon , enter **Inventory Overview**, and then choose the related link.
- On the **Item Card** page, on the action bar, select **Related > Warehouse > Inventory Overview**. The system automatically applies the item filter based on the selected item.
- On the **Stockkeeping Unit Card** page, on the action bar, select **Related > Warehouse > Inventory Overview**. The system automatically applies the item, variant, and location filters based on the stockkeeping unit information.

To view and manage the **Inventory Overview** page, follow these steps:

1. On the **General** FastTab, select one or more values in one or more of the following fields to apply filters to the item records.

Field	Description
Item Filter	Select items to filter the records by.
Variant Filter	Select item variants to filter the records by. Before selecting this field value, ensure to select a value in the Item Filter field.
Unit of Measure Filter	Select units of measure to filter the records by.
Item Category Filter	Select item categories to filter the records by.
Location Filter	Select locations to filter the records by.
Bin Filter	Select bins to filter the records by.
Lot Filter	Select lots to filter the records by.
Package Filter	Select packages to filter the records by. This field is visible only when the Aptean Packaging extension is installed.
Inspection Status Filter	Select inspection statuses to filter the records by. This field is visible only when the Aptean Inspection Status extension is installed.
Vendor Filter	Select vendors to filter the records by.
Service Provisioning Filter	Select a service provisioning type to filter the records by. The available options are: <i>Own</i> and <i>Third-Party</i> .



	This field is visible only when the Aptean Service Provisioning extension is installed.
Item Purchaser Filter	Select item purchasers to filter the records by. For more information, see Manage item purchasers .

2. On the action bar, select **Refresh Overview** to apply the selected filters.

The system displays the relevant item lines and the related information in the following fields:

Field	Description
Item No.	Specifies the number of the item.
Variant Code	Specifies the variant of the item.
Item Description	Specifies the description of the item or the variant.
Unit of Measure Code	Specifies how each unit of the item is measured.
Lot No.	Specifies the lot number associated with the item. You can select this value to open the relevant Lot No. Information Card page.
Blocked Lot No.	Specifies whether the lot is blocked from being posted in transactions.
Expiration Date	Specifies the expiration date associated with the lot.
Serial No.	Specifies the serial number associated with the item.
Package No.	Specifies the package number associated with the item. This field is visible only when the Aptean Packaging extension is installed.
Location Code	Specifies the location where the inventory is present. You can select this value to open the relevant Location Card page.
Bin Code	Specifies the bin where the item is present.
Quantity	Specifies the quantity of inventory of the item expressed in the unit of measure code. The system inherits this value from the associated item ledger entries.
Quantity (Base)	Specifies the quantity of inventory expressed in the base unit of measure of the item.
Inspection Status	Specifies the current inspection status of the item, variant, and lot. This field is visible only when the Aptean Inspection Status extension is installed.
Vendor No.	Specifies the vendor number associated with the item.
Vendor Name	Specifies the vendor name associated with the item.

3. Select the required item lines and then select any of the following actions as required:



Action	Description
Item Tracking Entries	Open the Item Tracking Entries page to view serial or lot numbers that are assigned to items.
Item Tracing	Open the Item Tracing page to view where a lot or serial number assigned to the item was used. For example, to find which lot a defective component came from or to find all the customers who have received item containing a defective component.
Transfer Ownership	Open the Transfer Ownership page to move inventory by shipping items to third-party customers and receiving items from third-party vendors. For more information see, Transfer the ownership of items . This action is visible only when the Aptean Service Provisioning extension is installed.

View additional details on the FactBox

On the **Item Attributes** FactBox, you can view the item attribute values of the selected item.

On the **Item Details – Quantity** FactBox, you can view the following information:

Field	Description
Item No.	Specifies the number of the selected item.
Variant Code	Specifies the variant of the selected item.
Location Code	Specifies the location code in which the inventory is present.
Lot No.	Specifies the lot number associated with the item.
Package	Specifies the package number associated with the item. This field is visible only when the Aptean Packaging extension is installed.
Quantity (Base)	Specifies the quantity of inventory expressed in the base unit of measure of the selected item.
Quantity (UOM)	Specifies the quantity of the inventory expressed in the catch weight unit of measure for the selected item. The system uses the Unit of Measure Code field value on the Catch Weight Setup page. For more information, see Set up catch weight . This field is available only when the Aptean Catch Weight extension is installed.



Service Provisioning Type	Specifies whether the service provisioning of the item is classified as own or third-party. This field is available only when the Aptean Service Provisioning extension is installed.
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On the **Lot Attributes** FactBox, you can view the lot attribute values of the selected item.

On the **Lot Origin Details** FactBox, you can view the following information:

Field	Description
Vendor Lot No.	Specifies the lot number that is supplied by the vendor of the selected item.
Production Date	Specifies the original production date of the items in the lot of the selected item.
Grower	Specifies the grower that has originally produced the item in the lot.
Country of Origin	Specifies the country where the item has been manufactured, produced, or where it originated from.
Certificate Number	Specifies the certificate number provided by the grower that indicates that they meet certain requirements, such as a fairtrade certificate.
Field Identification	Specifies the identification number of the production location where the lot number was originally produced.
Remark	Specifies additional information related to the lot origins.

On the **Vendor Details** FactBox, you can view the following information:

Field	Description
Vendor No.	Specifies the number of the vendor who delivered the selected item.
Vendor Name	Specifies the name of the vendor who delivered the selected item.
Buy-from Address	Specifies the address of the vendor who delivered the selected item.



Inventory projected availability setup

Article • 2/6/2025 • 5 min read

The Aptean Inventory Overview extension enables you to check the availability of inventory for a specific item or a group of items. You can set up the criteria for searching the items on the **Inventory Projected Availability** request page.

Follow the below steps to set up the **Inventory Projected Availability** request page:



1. Select the Search icon  , enter **Inventory Projected Availability** and then choose the related link.
2. On the **Inventory Projected Availability** page, in the **Use default values from** field, choose *Last used options and filters*.
This enables you to save the options and filters for future use.
3. On the **Locations** FastTab, choose a value in the **Location** field.
You can choose multiple locations in the **Location** field. In case you leave the field blank, all the locations will be selected by default.
4. On the **Projection Selection** FastTab, fill in the required fields.

Field	Description
Starting Date	Specifies the beginning date from which the projected availability calculations are displayed.
Period Type	Specifies the time period for inventory projections. Choose between day and week to determine the projection interval.
Period Projected	Specifies the period projected used as a filter for calculating inventory availability.
Unit Of Measure	Specifies the standard unit of measurement used to quantify the quantity of an item in inventory.

The conversions are done based on the value selected in the **Unit of Measure** field.

5. On the **Other Options** FastTab, turn on the following toggles based on your requirement:

Toggle	Action
Items With Activity Only	To include items that has an inventory, expected value, or committed value.



Overcommitted Only	To include items with more committed quantity than the actual available quantity.
Over Committed By Safety Stock	To track the item availability when it is below the safety stock level. You can turn on this toggle only when the Overcommitted Only toggle is turned on.
Group By Location	To view the item details on all locations.
Include Period Projection Columns	To view the item details for the projected periods.
Exclude Blocked Lots	To exclude the lot information in the physical inventory that is blocked on the Lot No. Information Card page.
Only Show Period Availability Projection	To show the availability projections organized by periods.
Include Requisition Lines	To include the requisition lines in the projected availability calculation.
Include Demand Production Forecast Entries	To include the forecasted production demand in projected availability calculations for effective inventory planning.
Demand Forecast Name	Specifies the demand forecast for projecting inventory availability. Choose from the dropdown list to predict inventory item demand over time.
Include Forecast starting from Period Projected	To include forecasted data starting from the projected period onward.

 **Note**

The **Demand Forecast Name** and **Include Forecast starting from Period Projected** fields are accessed only when the **Include Demand Production Forecast Entries** toggle is enabled.

1. On the **Lot Attribute** FastTab, add the filters for the **Lot Attributes** and the respective **Values**.
2. On the **Filter: Item** FastTab, add the filter for the fields available on the **Item Card**.
The **No.** and **Description** fields are available by default. However, you can add more filters by selecting **Filter**.
3. In the **Filter totals by** field, choose a filter to display the projected availability totals based on the following criteria:
 - Bin Filter
 - Component Forecast
 - Customer No. Filter
 - Date Filter



- Drop Shipment Filter
- Entry Type Filter
- Global Dimension 1 Code
- Global Dimension 2 Code
- License Plate No. Filter
- Location Filter

4. Select **OK**.

You can alternatively open the **Inventory Projected Availability** page,

- On the **Planning Worksheets** page, on the action bar, select **More options > Reports** and select **Inventory Projected Availability**.
- On the **Requisition Worksheets** page, on the action bar, select **AssistEdit > Reports > Inventory Projected Availability**.



Inventory projected availability

Article • 10/30/2023 • 2 min read

Once the request page is set up, you can check the inventory and the projected availability of an item or a group of items on the **Inventory Projected Availability** page. After running the report, the conversion of data for the items occurs on the Inventory Projected Availability **Entries** FastTab based on the values that you choose on the **Inventory Projected Availability** request page.

You can find the summary of data for all the projected dates on the **Entries** FastTab in the following fields:

- **Item No.**
- **Unit of Measure**
- **Location**
- **Physical Inventory**
- **Committed/Gross Requirement**
- **Expected**
- **Available**

The fields on the **Entries** FastTab reflect the **Committed**, **Expected**, and **Available** values of the items based on the above fields for the projected period.

This extension further enables you to check the item availability by applying the following filters:

- Event
- Period
- Variant
- Location
- Lot
- BOM Level
- Unit of Measure

To do so, on the **Entries** FastTab, choose **Availability > Item Availability by**. A new page will open with the item availability data based on the selected filter.

Note

You can perform new calculations in the fields on the **Entries** FastTab by changing the filters. To do so, choose the **Calculate** action on the action bar to open the **Inventory Projected Availability** request page.



To navigate further into the respective inventory list pages and check the **Inventory Document Types**, click the value in the fields on the **Entries** FastTab.

 **Note**

The available quantity through the projected timeline is calculated with the quantity present in the Physical Inventory – Committed/Gross + Expected.

The **Inventory Projected Availability** page can also be accessed from the following pages:

Page	Action
<ul style="list-style-type: none">• Item Card• Item List	On the action bar, choose Related > Availability > Inventory Projected Availability .
<ul style="list-style-type: none">• Purchase documents• Sales documents• Transfer documents• Production documents	On the Lines FastTab, choose Line > Item Availability by > Inventory Projected Availability .



Accessing the trading board

Article • 10/30/2023 • 1 min read

The Aptean **Trading Board** extension enables you to view both expected and received inventory on the level of lot numbers per location. You can directly access the **Trading Board Request** page from the **Inventory Projected Availability** page by choosing [Trading Board](#) on the action bar.

Note

Once you open the **Trading Board** page from the **Inventory Projected Availability** page, the values for **Location Code**, **Available From**, **Item No.**, and the **Trading Unit of Measure** fields get copied from the **Inventory Projected Availability** page. In case there are multiple locations for the **Inventory Projected Availability**, they would not be copied to this page.



Access the item inventory overview

Article • 10/30/2023 • 1 min read

The Aptean **Inventory Overview** extension further enables you to check the inventory information for multiple locations. You can do that by choosing **Inventory Overview** on the action bar on the **Inventory Projected Availability** page.

Note

Once you open the **Inventory Overview** page from the **Inventory Projected Availability** page, the values for **Location Code** and **Item No.** fields get copied from the **Inventory Projected Availability** page. In case there are multiple locations, they would get copied too.



Cut functionality in sales order

Article • 12/27/2023 • 1 min read

When you create a Sales Order and release it, the Cut functionality can be used to set aside a specific quantity of the order by maintaining the traceability of the **Original Quantity** and the **Cut Reason**. This functionality can be helpful in situations like lack of inventory, change of demand, or change in priority of orders for a specific product.

Follow the below steps to use the Cut functionality:

1. On the **Sales Order** page, on the **Lines** FastTab, choose **Line > Cut Order Quantity**.
The **Cut Quantity** page opens.
2. In the **Cut Quantity** field, enter a value that you want to keep aside.
3. In the **Reason Code** field, choose an option.
4. Click **OK**.

Note

You can also choose the **Reason Code** or make it mandatory by turning on the **Cut Reason Code Required** toggle and then choosing a value in the **Default Cut Reason Code** field on the **General** FastTab of the **Sales & Receivables Setup** page.

1. On the **Sales Order** page, on the action bar, choose **Home > Post**.

Once you post the Sales Order, you can view the posted records on the **Lines** FastTab of the **Sales Invoice** page.



Redistribution worksheet

Article • 12/27/2023 • 4 min read

You can use the **Redistribution Worksheet** feature to cut the order lines when falling short of inventories for an item on multiple Sales Orders. Follow the below steps:



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

The **Redistribution Worksheet** request page opens.

Note

You can also access the **Redistribution Worksheet** page from the

- **Item Card** page by choosing **Related > Availability > Redistribution Worksheet** on the action bar.
- **Inventory Projected Availability** page by choosing **Redistribution > Redistribution Worksheet** on the **Entries** FastTab.

1. Fill in the required fields and then click **OK**.

The **Redistribution Worksheet** page opens with the values entered in all the fields on the **Redistribution Worksheet** request page.

Note

Choose a value in the **Cut Reason Code** field if you have not chosen a value in the **Default Cut Reason Code** field on the **General** FastTab of the **Sales & Receivables Setup** page.

1. On the **Redistribution Worksheet** page, on the **Lines** FastTab, in the **Substitute Item** field, enter a value.

You can add the substitute item from the list when you want to use it instead of the original item.

2. In the **New Order Quantity** field, enter a new value, if required.

The **Changed** checkbox is automatically selected on changing the values in the **Substitute Item** and **New Order Quantity** fields.

Note

You cannot add a value for the new quantity that is greater than the original quantity.

1. On the action bar, click **Apply**.



You can also use the **Allocation** action on the action bar to allocate the quantity in the **New Order Quantity** field based on the quantities specified in the **Current Order Quantity** field. Follow the below steps to use this feature:

1. On the **Redistribution Worksheet** page, on the **Line** action bar, choose **Allocate**.

The **Allocate Dialog** page opens.

2. In the **Total New Quantity** field, enter a value to specify the total number of units that are to be sold.

3. In the **Method** field, choose one of the following options:

- *Proportionally* – The system gradually allocates the total new quantity using proportion. The proportion is calculated based on the current sales line quantities.
- *Equally* – The system divides the quantity equally between the current sales line quantities, excluding the locked lines.

Note

If the new quantity is greater than the original quantity, then the new quantity will be accepted as the original quantity.

1. Click **OK**.

2. On the **Redistribution Worksheet** page, on the **Lines** FastTab, select **Apply**.

Note

In case, the **Picked/Shipped** and **Locked** checkboxes are selected for a line, changes cannot be made in the **Substitute Item** and the **New Order Quantity** fields. You can also lock a specific line by choosing the **Lock/Unlock** action to stop the allocation of new values.



Integrations

Article • 7/30/2025 • 1 min read

The Aptean Inventory Overview extension has been integrated with the following extensions:

- [Aptean Essentials](#)
- [Aptean Protein Essentials](#)
- [Aptean POD Integration Connector](#)
- [Aptean Service Provisioning](#)



Aptean Essentials

Article • 7/30/2025 • 1 min read

The Aptean [Essentials](#) extension must be installed to use the Aptean Inventory Overview extension. Additionally, you can use the **Item Purchaser Filter** field to filter items based on item purchasers on the **Inventory Overview** page. For more information, see [Manage the Inventory Overview page](#).



Aptean Protein Essentials

Article • 6/10/2025 • 1 min read

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



Aptean POD Integration Connector

Article • 7/2/2025 • 1 min read

When the Aptean Inventory Overview extension is used in conjunction with the Aptean [POD Integration Connector](#), you gain real-time visibility into inventory availability during the proof of delivery process. This ensures that the delivered quantities match the available stock and allows accurate inventory updates based on delivery confirmations.



Aptean Service Provisioning

Article • 7/30/2025 • 1 min read

When the Aptean Inventory Overview extension is used in conjunction with the Aptean [Service Provisioning](#) extension, you can filter items based on their service provisioning type on the **Inventory Overview** page and view the service provisioning type applied on the **Item Details – Quantity** FactBox. For more information, see [Manage the Inventory Overview page](#).

Additionally, you can transfer ownership by shipping items to third-party customers and receiving items from third-party vendors. For more information, see [Transfer the ownership of items](#).

