

User Manual

Aptean Food and

Beverage ERP

Packaging

Product Documentation



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Release notes

Article • 11/28/2025 • 2 min read

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

Date	Release version	Description
November 2025	2508.2.0.0	Stability release
November 2025	2508.1.0.0	Stability release
November 2025	2508.0.0.0	Feature release
October 2025	2507.1.0.0	Stability release
September 2025	2507.0.0.0	Feature release
September 2025	2506.1.0.0	Stability release
August 2025	2506.0.0.0	Feature release
July 2025	2505.1.0.0	Stability release
July 2025	2505.0.0.0	Feature release
June 2025	2504.0.0.0	Feature release
May 2025	2503.5.0.0	Stability release
April 2025	2503.4.0.0	Stability release
March 2025	2503.3.0.0	Stability release
March 2025	2503.2.0.0	Stability release
March 2025	2503.1.0.0	Stability release
March 2025	2503.0.0.0	Feature release
March 2025	2502.2.0.0	Stability release
February 2025	2502.1.0.0	Stability release
February 2025	2502.0.0.0	Feature release
February 2025	2501.2.0.0	Stability release



January 2025	2501.1.0.0	Stability release
January 2025	2501.0.0.0	Feature release
December 2024	2408.2.0.0	Stability release
December 2024	2408.1.0.0	Stability release
December 2024	2408.0.0.0	Feature release
December 2024	2407.4.0.0	Stability release
November 2024	2407.3.0.0	Stability release
November 2024	2407.2.0.0	Stability release
November 2024	2407.1.0.0	Stability release
October 2024	2407.0.0.0	Feature release
October 2024	2406.3.0.0	Platform release
October 2024	2406.2.0.0	Platform release
October 2024	2406.1.0.0	Stability release
October 2024	2406.0.0.0	Feature release
September 2024	2405.2.0.0	Platform release
September 2024	2405.1.0.0	Stability release
September 2024	2405.0.0.0	Feature release
August 2024	2404.1.0.0	Stability release
August 2024	2404.0.0.0	Feature release
August 2024	2403.4.0.0	Stability release
July 2024	2403.3.0.0	Stability release
July 2024	2403.2.0.0	Stability release
July 2024	2403.1.0.0	Stability release
June 2024	2403.0.0.0	Feature release
June 2024	2402.0.0.0	Feature release



June 2024	2401.1.0.0	Stability release
June 2024	2401.0.0.0	Feature release
April 2024	2302.3.0.0	Stability release
April 2024	2302.2.0.0	Stability release
March 2024	2302.1.0.0	Stability release
December 2023	2302.0.0.0	Feature release
November 2023	2301.4.0.0	Stability release
October 2023	2301.3.0.0	Stability release
October 2023	2301.2.0.0	Stability release
September 2023	2301.1.0.0	Stability release
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August 2022	1.9.56385.0	Stability release
August 2022	1.9.55757.0	Stability release
July 2022	1.9.53930.0	Stability release
May 2022	1.8.49023.0	Stability release



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May 2022	1.7.47551.0	Stability release
March 2022	1.6.45155.0	Stability release



2508.2.0.0

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

Resolved issues

The following issue has been resolved in this release.

ID	Description
341693	An error occurs on the Sales Credit Memo page when posting a credit memo that includes order-bound packaging information.



2508.1.0.0

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

Enhancements/Modifications

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

Resolved issues

The following issue has been resolved in this release.

ID	Description
335121	An error occurs when accessing the Default Packaging page from the Customer Card page for customers without any default packaging configured. The page fails to load instead of opening a blank Default Packaging page that allows new records to be created.



2508.0.0.0

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

Features

With the feature added in this release of the Aptean Packaging extension, you can view consolidated packaging balances across multiple customers and vendors that belong to the same consolidated account. For more information, see [View consolidated packaging balances](#).

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean Over Under Delivery extension. For more information, see [What's new in Over Under Delivery, version 2507.0.0.0](#).



2507.1.0.0

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

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean EDI extension. For more information, see [What's new in EDI, version 2515.0.0.0](#).

Resolved issues

The following issues have been resolved in this release.

ID	Description
296134	A performance issue occurs when calculating packaging per order or per item on the Sales Order page using shipping container and shipping unit values.
312010	An error occurs when attempting to delete a sales order after executing the Undo Shipment action to correct the posted quantity. This issue arises when the Type field value is set to <i>Item Bound</i> on the Default Packaging page associated with the items on the sales order.



2507.0.0.0

Release Note • 9/24/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Packaging extension, when the Aptean [Advanced Pricing](#) extension is installed, the system sets the **Invoice Hold Status** field value to *Hold – Pricing* for packaging lines with the **Allow Packaging Recalculation** checkbox selected when the associated sales order lines are put on hold on the **Sales Order** page. For more information, see [Integration with Aptean Advanced Pricing](#).

Integrations

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



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 Over Under Delivery extension is installed.



2506.0.0.0

Release Note • 8/27/2025 • 2 min read

Features

With the features added in this release of the Aptean Packaging extension, you can manage packaging lines more effectively during the prepayment process on sales and purchase orders. Additionally, the system:

- Automatically generates packaging lines before posting prepayment invoices.
- Prompts for confirmation when packaging is involved.
- Updates packaging lines based on item line changes.

For more information, see [Use the prepayment functionality with packaging processes](#).

Enhancements/Modifications

With this release of the Aptean Packaging extension, when the [Aptean Over Under Delivery](#) extension is installed, the system applies underdelivery functionality across sales, purchase, and warehouse documents. The packaging lines are automatically recalculated and updated when the **Underdelivery** checkbox is selected for the main items on the related pages, ensuring accurate quantities and consistent handling of both item-bound and order-bound lines. These functionalities apply to direct shipments, warehouse shipments, inventory picks and put-aways, and unexpected items added during warehouse receipt processing, streamlining packaging management throughout the supply chain. For more information, see [Calculate Packaging Per](#) and [Packaging calculation with over under delivery](#).

When the Aptean [Grower Return](#) extension is installed, the system automatically generates lines for packaging items when creating a purchase invoice from the **Settlement** page and posts them when the purchase invoice is posted. For more information, see [What's new in Grower Return, version 2504.0.0.0](#).

Integrations

The Aptean Packaging extension has been integrated with the following extensions:

- Aptean [Over Under Delivery](#)
- Aptean [Grower Return](#)

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



UI/UX changes

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

- The **Create Packaging Lines** action has been added to the **Sales Order** and **Purchase Order** pages.
- The **Prepayment Confirmation** toggle has been added to the **Packaging Setup** page.



2505.1.0.0

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 EDI extension. For more information, see [What's new in EDI, version 2512.0.0.0](#).



2505.0.0.0

Release Note • 7/30/2025 • 2 min read

Features

With the features added in this release of the Aptean Packaging extension,

- You can define multiple trade plan rates for multiple shipping containers when the **Trade Rate Setup** field value is set to *Specific* and the **Use in Sales** and/or **Use in Purchase** toggles on the **Trade Plan** page are turned on. This prevents setting up multiple trade plans to define trade plan rates per shipping container. For more information, see [Set up trade plan rates for specific sources](#).
- The system supports allocating packaging costs per shipping container for items with the **Type** field value set to *Order Bound* on the **Default Packaging** page by calculating the **Eligible Base** field value on the **Document Trade Lines** page based on the trade plan set up. The system dynamically updates the eligible base when quantity requirements change. Additionally, previous restrictions on the logistical setup of the location have been removed. For more information, [Manage the document trade lines](#).
- You can set up trade plan rates for periodic costs to calculate packaging costs per shipping container based on actual or expected packaging quantity. For more information, see [Set up trade plan rates for periodic costs](#).
- You can set up trade plan rates for production costs to calculate packaging costs per shipping container. The system applies the relevant trade plan rate, calculates the eligible base, and posts capacity ledger entries to record packaging costs. For more information, see [Set up trade plan rates for production costs](#) and [Manage production costs defined per shipping container](#).

Note

These features are available only when the Aptean [Trade Management](#) extension is installed. For more information, see [What's new in Trade Management, version 2506.0.0.0](#).

Resolved issues

The following issue has been resolved in this release.

ID	Description
305476	The system fails to display the trade plans on the Document Trade Lines page of a purchase order created from an imported manifest via the Manifest page. This issue occurs for trade plans with the Rate Type field value set to <i>Amount per Shipping Unit</i> or <i>Amount per Shipping Container</i> .



This issue arises only when the Aptean [Global Trade](#), Aptean [Advanced Attributes](#), and Aptean [Trade Management](#) extensions are installed.



2504.0.0.0

Release Note • 6/4/2025 • 1 min read

Features

With the features added in this release of the Aptean Packaging extension, the drop shipment workflows have been enhanced to support synchronized packaging transactions between linked sales and purchase orders. The system automatically creates, updates, recalculates, or deletes packaging lines based on changes in drop shipment scenarios. These enhancements ensure consistency of packaging data across documents and support bidirectional updates, whether a sales order is created from a purchase order or vice versa. For more information, see [Synchronizing packaging transactions in drop shipments](#).

Integrations

The Aptean Packaging extension has been integrated with the Aptean [Drop Shipment](#) extension. To know more, see [Integrations](#).



2503.5.0.0

Release Note • 5/8/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Packaging extension, the translation files have been added for the following languages:

- Polish (pl-PL)
- Chinese (zh-CN)



2503.4.0.0

Release Note • 4/29/2025 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean EDI extension. To know more, see [What's new in EDI, version 2507.0.0.0](#).



2503.3.0.0

Release Note • 3/26/2025 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean EDI extension. To know more, see [What's new in EDI, version 2506.0.0.0](#).



2503.2.0.0

Release Note • 3/13/2025 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean EDI extension. To know more, see [What's new in EDI, version 2505.0.0.0](#).



2503.1.0.0

Release Note • 3/12/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Packaging extension, the tooltip for the **Round Order Bound Shipping Containers** Per field on the **Packaging Setup** page has been updated to clarify that this functionality applies only to sales documents.



2503.0.0.0

Release Note • 3/12/2025 • 1 min read

Features

With this release of the Aptean Packaging extension, you can generate a payload that includes package details such as mandatory shipping container during AIP events when the [Aptean Platform Integration](#) connector is used in conjunction with the Aptean Packaging extension.

Integrations

The Aptean Packaging extension has been integrated with the [Aptean Integration Platform](#) connector.



2502.2.0.0

Release Note • 3/12/2025 • 2 min read

Enhancements/Modifications

With this release of the Aptean Packaging extension, the system displays error messages in the following scenarios to ensure better handling of packaging items.

- When the **Order Tracking Policy** field value is changed from *None* to *Tracking Only* or *Tracking & Action Msg.* on the **Item Card** page for packaging items.
- When packaging items with the **Order Tracking Policy** field value set to *Tracking Only* or *Tracking & Action Msg.* are selected on the **Packaging Types** page.
- When creating packaging items on the **Packaging Types** page and selecting items with the **Order Tracking Policy** field value set to *Tracking Only* or *Tracking & Action Msg.* on the **Config. Template Header** page.

This enhancement addresses the issue reported in bug ID #257301.

Important

If the **Order Tracking Policy** field value was set to *Tracking Only* or *Tracking & Action Msg.* for packaging items before this release, you must manually update the field value to *None*.

Resolved issues

The following issue has been resolved in this release.

ID	Description
257301	The system fails to post transfer orders containing packaging items with the Order Tracking Policy field value set to <i>Tracking Only</i> or <i>Tracking & Action Msg.</i> on the Item Card page.



2502.1.0.0

Release Note • 2/26/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
266606	The system does not display all source documents on the Packaging page linked to the warehouse receipt when executing the Packaging action from the Warehouse Receipt page. Instead, it only shows the last selected source document when multiple source documents are selected.



2502.0.0.0

Release Note • 2/25/2025 • 1 min read

Features

With this release of the Aptean Packaging extension, you can access the **Default Packaging** page records directly from the **Customer Card** and **Vendor Card** pages. For more information, see [Set up customers/vendors](#).

UI/UX changes

The **Default Packaging** action has been added to the **Customer Card** and **Vendor Card** pages.



2501.2.0.0

Release Note • 2/14/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Packaging extension, the system calculates the quantity field values for packaging in a transfer order when receiving items, provided the **Packaging Calculation** field is set to *Manual* on the **Packaging Setup** page.

- When the transfer order is fully posted, the system updates the **Quantity** field on the **Posted Warehouse Receipts** page.
- When the transfer order is partially posted, the system updates the **Quantity Received** field on the **Transfer Order** page.



2501.1.0.0

Release Note • 1/29/2025 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean EDI extension which has been refactored to handle packaging efficiently through the Aptean EDI 810 port. To know more, see [What's new in EDI, version 2501.0.0.0](#).



2501.0.0.0

Release Note • 1/7/2025 • 1 min read

Features

With the features added in this release of the Aptean Packaging extension,

- You can use the **Related Drop Shipment Doc No.** field on the **Packaging Transaction** page to synchronize packaging transactions in drop shipment scenarios. This field supports one-to-one, one-to-many, and many-to-one relationships between sales and purchase orders to ensure accurate synchronization of packaging details. To know more, see [Synchronizing packaging transactions in drop shipments](#).
- The system automatically populates the **Related Drop Shipment Doc No.** field value when all lines in a document are marked as drop shipment and linked to the same document. If the field value is not automatically populated, you can manually enter a valid document number.
- You can navigate to the related sales or purchase orders by selecting the value in the **Related Drop Shipment Doc No.** field, improving efficiency.
- Prevent invalid inputs in the **Related Drop Shipment Doc No.** field value by displaying a list of valid documents for selection.

Note

These features apply only when the **Packaging Calculation Method** field on the **Packaging Transaction** page is set to *Manual*.

UI/UX changes

The **Related Drop Shipment Doc No.** field has been added to the **Packaging Transaction** page.



2408.2.0.0

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

Resolved issues

The following issue has been resolved in this release.

ID	Description
254548	An error occurs when selecting the License Plate No. field on the Inventory Movement page, created via the Create Consolidated Production Movement action, for a released order containing a component item that has the default packaging setup.



2408.1.0.0

Release Note • 12/18/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
239852, 239225	The system displays an incorrect value in the Quantity To Post field on the Order Bound Packaging FastTab of the Packaging page for non-posted lines in partially received warehouse receipts. Additionally, the system displays an incorrect value in the Quantity Posted field on the Order Bound Packaging FastTab of the Packaging page when the warehouse receipt is created from a sales return order and is partially received.



2408.0.0.0

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

Enhancements/Modifications

With this release of the Aptean Packaging extension, the system transfers package-related information from the **Transfer Order** page to the associated **Posted Transfer Receipt** and **Posted Transfer Shipment** pages.



2407.4.0.0

Release Note • 12/11/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
238769	An error occurs upon updating the default packaging values in Excel by executing the Edit in Excel action on the Default Packaging page associated with the item.



2407.3.0.0

Release Note • 11/21/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
243958	The system incorrectly adds packaging items to the lines of the Sales Contract and Purchase Contract pages upon executing the Release action.



2407.2.0.0

Release Note • 11/19/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
236111	The system incorrectly updates the Quantity To Post field on the Order Bound Packaging FastTab of the Packaging page associated with the warehouse receipt. This issue occurs when the Packaging Calculation Method field is set as <i>On Release</i> on the Packaging Setup page.



2407.1.0.0

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

Enhancements/Modifications

This extension has been updated to ensure interoperability with the Aptean EDI extension. To know more, see [What's new in Aptean EDI, version 2408.0.0.0](#).



2407.0.0.0

Release Note • 10/25/2024 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean Trade Management extension. To know more, see [What's new in Trade Management, version 2412.0.0.0](#).



2406.3.0.0

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

Enhancements/Modifications

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



2406.2.0.0

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

Enhancements/Modifications

The following changes have been made to ensure compatibility with Business Central, version 26.

- The *Whse.-Create Source Document* object has been replaced with *Transfer Warehouse Mgt* in the *PostPackagingTransferFDW* codeunit.
- The *Power BI Report Spinner Part* object is obsolete and has been replaced with *Power BI Embedded Report Part* on the *PackagingRoleCenterFDW* page.



2406.1.0.0

Release Note • 10/15/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
229835	The system incorrectly updates the Quantity field on the sales line after posting the sales order. This issue occurs when the Quantity To Post field on the Packaging Transaction page associated with the sales order is manually changed from the value inherited from the Quantity Per Packaging field.



2406.0.0.0

Release Note • 10/1/2024 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the Aptean [Trade Management](#) extension, to accomodate the integration with the Aptean [Transport](#) extension. To know more, see [What's new in Trade Management, version 2411.0.0.0](#).



2405.2.0.0

Release Note • 9/24/2024 • 1 min read

Enhancements/Modifications

The *OnBeforePostSourceDocument* event has been replaced with *OnPostSourceDocumentAfterGetWhseShptHeader* event in the *Whse.-PostShipment* codeunit to ensure the successful posting of warehouse shipments. This update has been implemented due to the deprecation of the *OnBeforePostSourceDocument* event in Business Central, version 25.



2405.1.0.0

Release Note • 9/23/2024 • 1 min read

Enhancements/Modifications

This extension has been updated to support the addition of the **Exclude Packaging from Transport** toggle to the Aptean Transport extension. To know more, see [What's new in Aptean Transport, version 2404.5.0.0](#).



2405.0.0.0

Release Note • 9/4/2024 • 1 min read

Features

With this release of the Aptean Packaging extension, you can edit the description of the packaging type on the **Packaging Types** page, even if there are existing packaging entries for the relevant packaging type. For more information, see [Packaging Types](#).

Enhancements/Modifications

The following enhancements have been made in this release.

- The description of the error message has been updated for the scenario when executing the **Recalculate Packaging** action on the **Packaging Transaction** page if the relevant sales order does not include any items.
- The system does not update sales order lines with packaging types that have the **Quantity To Post** field value of **0** on the **Packaging Transaction** page when shipping the sales order. This applies even if the item has only order-bound packaging.



2404.1.0.0

Release Note • 8/21/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Packaging 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 • 8/20/2024 • 1 min read

Enhancements/Modifications

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



2403.4.0.0

Release Note • 8/7/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
210104	Performance issue occurs when posting a purchase receipt or sales shipment with multiple lines, causing delays and blocking other operations. This issue occurs because the <i>OnRunOnBeforeFinalizePosting</i> event makes recursive calls to the base application objects.



2403.3.0.0

Release Note • 7/19/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
219514	The system fails to display the license plate information on the Purchase - Invoice report upon executing the Post and Print action on the Purchase Order page. This issue occurs when the Calculate Packaging Per field is set to <i>Order</i> on the Packaging Setup page.



2403.2.0.0

Release Note • 7/17/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
220888	The system fails to display a customer specific packaging on the PO Details screen of the Aptean Shop Floor Production Power App when a released production order is created from the sales order.

Note

The fix for this bug has been implemented in correlation with bug IDs #209053 and #216449 in the Aptean Shop Floor Production Power App version [3.20.170859.0](#).



2403.1.0.0

Release Note • 7/3/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
210099	The system fails to calculate the item-bound packaging correctly on the Inventory Put-away and Inventory Pick pages when multiple lots are assigned to an item.



2403.0.0.0

Release Note • 6/26/2024 • 1 min read

Enhancements/Modifications

With this release of Aptean Packaging extension, you can view the **Shipping Unit Packaging Code** and **Shipping Container Packaging Code** fields on the harvest order lines, week forecasts, and day forecasts. To know more, see [What's new in version 2401.0.0.0](#).



2402.0.0.0

Release Note • 6/25/2024 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean Trade Management extension. To know more, see [What's new in version 2407.0.0.0](#).



2401.1.0.0

Release Note • 6/18/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
199647	Permission errors occur while performing production activities in the Aptean Shop Floor Production Power App when users have <i>Basic</i> permission sets for the integrated Aptean Packaging extension.



2401.0.0.0

Release Note • 6/13/2024 • 3 min read

Features

With this release of the Aptean Packaging extension, you can:

- Determine whether the location specified in the header or line should be considered for packaging calculations.
- Perform packaging calculations even in the case of partial receipts or shipments.
- Determine whether the packaging items should be added to the orders automatically when releasing the document or when the receipt/shipment is posted.
- Determine whether order bound shipping containers should be calculated across all order lines or per individual order line.
- Determine the sequence of operations, such as summing and rounding off, when calculating packaging quantity for combined order bound.

For more information, see [Packaging Setup](#) and [Packaging calculations](#).

- Perform packaging calculations only for the lines present on the warehouse documents. For more information, [Inbound warehouse transactions](#) and [Outbound warehouse transactions](#).
- Determine whether the responsibility for managing the packaging type lies with the customer or shipping agent, and compute the packaging balances for them. For more information, see [Packaging Setup for Customer/Vendor](#).
- View the responsible individual for managing the packaging type that has an entry on the **Packaging Entries** and **Packaging Specification Entries** pages.
- View the packaging balances for specific shipping agents.

For more information, see [Packaging Entries](#).

- Change the responsibility type and person of the packaging entries. For more information, see [Correct Packaging Entries](#).

Enhancements/Modifications

For existing entries on the **Packaging Entries** and **Packaging Specification Entries** pages, the **Responsibility Type** field will be automatically set to *Customer* or *Vendor* and the **Responsibility Code** field will be updated with the respective customer or vendor number.



UI/UX changes

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

- The **Packaging Setup** page is added.
- The **Packaging Balance** action is added to the **Shipping Agents** page.
- The **Correct Packaging Entries** action is added to the **Packaging Entries** page of the customer, vendor, and shipping agent.
- The **Add Packaging** action is added to the lines of the following pages:
 - **Sales Order**
 - **Purchase Order**
 - **Transfer Order**
- The **Packaging Setup** action is added to the Role Center page.
- The **Handling** field is added to the following pages:
 - **Packaging Types**
 - **Packaging Entries**
 - **Packaging Specification Entries**
- The **Responsible Shipping Units Balance** and **Responsible Shipping Container Balance** fields are added to the following pages:
 - **Packaging** (of the customer)
 - **Packaging** (of the vendor)
- The **Units** and **Container** fields are added to the **Shipping and Payment** FastTab of the following pages:
 - **Purchase Order**
 - **Purchase Invoice**
 - **Purchase Order Archive**
 - **Purchase Return Order**
 - **Purchase Credit Memo**
 - **Purchase Return Order Archive**
- The **Units** and **Container** fields are added to the **Shipping and Billing** FastTab of the following pages:
 - **Sales Order**
 - **Sales Invoice**
 - **Sales Order Archive**
 - **Sales Return Order**



- **Sales Credit Memo**
- **Sales Return Order Archive**
- The **Allow Packaging ReCalculation** and **Packaging Calculated** fields are added to the lines of the following pages:
 - **Purchase Order**
 - **Purchase Return Order**
 - **Purchase Credit Memo**
 - **Purchase Invoice**
 - **Sales Credit Memo**
 - **Sales Invoice**
 - **Sales Order**
 - **Sales Return Order**
 - **Transfer Order**
- The **Round order Bound Shipping Containers Per** field is added to the **Packaging** page of the customer and shipping agent.
- The **Responsibility Type** and **Responsibility Code** fields are added to the following pages:
 - **Packaging Entries**
 - **Packaging Specification Entries**
 - **Packaging Balance** (of the customer)
 - **Packaging Balance** (of the vendor)
 - **Packaging Balance** (of the shipping agent)
- The **Order Reference Line No.** field is added to the **Packaging** page of the warehouse shipments, warehouse receipts, inventory put-aways, and inventory picks.



2302.3.0.0

Release Note • 4/30/2024 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean EDI extension. To know more, see [What's new in version 2402.2.0.0](#).



2302.2.0.0

Release Note • 4/16/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
189945	Unable to open the sales order while selecting a Location with no value in the Packaging Code field on the Packaging Transaction page associated with it and closing it. This also occurs with the Sales Return Orders, Purchase Return Orders, and Transfer Orders.



2302.1.0.0

Release Note • 3/7/2024 • 1 min read

Enhancements/Modifications

Curated certain captions and tooltips to remove erroneous spellings and enhance the readability in French version (fr-FR).

Resolved issues

The following issue has been resolved in this release:

ID	Description
180631	An error occurs while entering the quantity on the Sales Order page due to an indirect permission set.



2302.0.0.0

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

Enhancements/Modifications

Modifications were made for this extension to accommodate the changes in the Aptean Transport extension. To know more, see [What's new in version 2302.0.0.0](#).



2301.4.0.0

Release Note • 11/9/2023 • 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.



2301.3.0.0

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

Enhancements/Modifications

Modifications were made for this extension to accommodate the changes in the following extensions:

- Aptean [Reporting](#)
- Aptean [Global Trade](#)

To know more, see [What's new in version 2301.0.0.0](#) of the Reporting and [What's new in version 2301.0.0.0](#) of the Global Trade extensions.



2301.2.0.0

Release Note • 10/4/2023 • 1 min read

Enhancements/Modifications

Modifications were made for this extension to accommodate the changes in the Aptean [Trade Management](#) extension. To know more, see [What's new in version 2301.1.0.0](#).



2301.1.0.0

Release Note • 9/28/2023 • 1 min read

Enhancements/Modifications

Modifications were made to this extension to work in conjunction with the Aptean **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.



1.18.114737.0

Release Note • 8/28/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
142680	When a Posted Sales Invoice is canceled, the system creates additional lines for packaging items on the Posted Sales Credit Memo .



1.17.112413.0

Release Note • 8/9/2023 • 1 min read

Resolved issues

The following issue has been addressed in this release:

ID	Description
137566	When you close the Packaging Location Setup Wizard without clicking Finish , the Packaging Location field remains empty on the Warehouse FastTab on the Location Card page.



1.16.110465.0

Release Note • 7/26/2023 • 1 min read

Enhancements/Modifications

Modifications were made for this extension to accommodate the changes in the Aptean [Trade Management](#) extension. To know more, see [What's new in version 1.22.110783.0](#).



1.15.108401.0

Release Note • 7/12/2023 • 1 min read

Resolved issues

The following issue has been addressed in this release:

ID	Description
127612	When a Posted Sales Invoice is canceled, the system creates additional lines for packaging items on the Posted Sales Credit Memo .



1.14.104672.0

Release Note • 6/26/2023 • 1 min read

Resolved issues

The following issues have been resolved in this release:

ID	Description
122690	<ul style="list-style-type: none">• The packaging location and the inventory posting setup are created before finishing the Packaging Location Setup Wizard.• An error message occurs while finishing the Packaging Location Setup Wizard rather than during the initial creation of the packaging location if the packaging location already exists in the Register Packaging Setup.



1.13.95616.0

Release Note • 5/8/2023 • 1 min read

Enhancements/Modification

Modifications were made for this extension to accommodate the changes in the Aptean [Global Trade](#) extension. The Aptean Global Trade extension simplifies the management of shared manifest information from multiple suppliers. It imports Excel or CSV files into Business Central to create transaction documents and helps in reducing costs, preventing duplication, and minimizing errors.



1.12.92850.0

Release Note • 4/29/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
111658	An error occurs when attempting to select the Item Tracking Code field on the Item Tracking FastTab on the Item Template page.



1.11.87640.0

Release Note • 4/3/2023 • 1 min read

Resolved issues

The following issue has been addressed in this release:

ID	Description
104064	When entering a value in the Quantity To Post field without a value in the Packaging Code field on the Order Bound Packaging FastTab on the Packaging Transaction page of a Sales Order, an error occurs stating that the <i>Packaging Type does not exist</i> . On clicking OK , the Sales Order becomes non-editable.



1.10.81364.0

Release Note • 4/29/2023 • 1 min read

Enhancements/Modifications

The Item Cross Reference table has been renamed to Item Reference concerning the changes made in the Business Central version 22.



1.9.77182.0

Release Note • 4/3/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
93038	In the Dutch(BE) and Dutch(NL) versions of the Aptean Packaging extension, the captions have different translations.



1.9.58321.0

Release Note • 4/3/2023 • 1 min read

Enhancements/Modifications

Minor technical changes were made to handle localization specific test errors on test apps.



1.9.56385.0

Release Note • 4/3/2023 • 1 min read

Enhancements/Modifications

Minor technical changes were made

- To seamlessly work with the Aptean [Integration Layer](#) extension.
- To seamlessly work with the Aptean Foundation Layer extension. This extension holds all the standard table values for its dependent extensions.



1.9.55757.0

Release Note • 4/3/2023 • 1 min read

Resolved issues

The following issues have been resolved in this release:

ID	Description
39404	Some of the packing codes added to the Item Card are not displayed on the Packaging Transaction page in the sales document.
55242	Some of the packing codes added to the Item Card are not displayed on the Packaging Transaction page in the purchase document.



1.9.53930.0

Release Note • 4/3/2023 • 1 min read

Enhancements/Modifications

Minor technical changes were made

- To keep our apps in line with *updated* coding guidelines for Business Central.
- To seamlessly work with the Aptean [Reporting](#) extension, which provides easy-to-read Sales and Manufacturing reports. These reports can be printed or saved as a file.



1.8.49023.0

Release Note • 4/3/2023 • 1 min read

Enhancements/Modifications

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



1.7.47551.0

Release Note • 4/3/2023 • 1 min read

Enhancements/Modifications

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



1.6.45155.0

Release Note • 4/3/2023 • 1 min read

Enhancements

A localized version of Packaging extension is made available for the Switzerland market with the addition of German language code [de-CH].



Introduction

Article • 4/3/2023 • 1 min read

The Aptean Packaging (PAC) extension seamlessly integrates with Business Central order entry processes to provide a consistent way of registering returnable packaging items. With this extension you can:

- Define casks, pallets, and other packaging items that were shipped or received, regardless of the order type or location.
- Keep track of stock levels and values by linking Packaging Types to Items.
- Set up default packaging that automatically calculates for specific transactions.
- Choose between Item bound, and Order bound packaging, and make changes at a transactional level.
- As transactions are posted, a separate administration of packaging entries is created, providing a real-time overview of outstanding packaging balances at either customer or vendor level. The extension automatically creates OData-feeds in the Web Services, making it easy to access all necessary information.

 **Note**

The packaging calculation only works if the quantity to ship is specified in the order.



Setup

Article • 2/5/2025 • 1 min read

The following setups are required.

- [Manage permission sets](#)
- [Set up packaging](#)
- [Set up packaging types](#)
- [Register packaging setup](#)
- [Set up packaging locations](#)
- [Set up customers/vendors](#)



Manage permission sets

Article • 8/22/2024 • 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 *PACKAGINGFDW*.

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 *PACKAGINGBASICFDW*.

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 Packaging extension, ensuring secure and role-based access.



Set up packaging

Article • 8/27/2025 • 5 min read

Before working with packaging some setup is required. This setup determines the packaging items and the packaging locations that will be used.

On the **Packaging Setup** page, you can determine configurations based on which the packaging calculations are performed.

To configure the **Packaging Setup** page, follow these steps:



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

The **Packaging Setup** page opens.

2. On the **General** FastTab, fill in the fields as follows:

Field	Description
Packaging Location by	<p>Select the option from which the location should be considered for packaging calculations.</p> <p><i>Document Header</i> – The packaging location configured on the Location Card page of the location specified in the order header is used for packaging calculations for the items in the order lines. This is the default option.</p> <p><i>Document Line</i> - The packaging location configured on the Location Card page of the location specified in the order line is used for packaging calculations for the items in the order lines. This is the default option.</p> <p>This functionality is applicable to the following documents:</p> <ul style="list-style-type: none"> • Purchase orders • Purchase invoices • Purchase return orders • Purchase credit memos • Sales orders • Sales invoices • Sales return orders • Sales credit memos <p>For more information, see Packaging calculations.</p>
Packaging Calculation Method	<p>Select the appropriate option.</p> <p><i>Manual</i> – The Packaging calculations are initiated when the packaging page is</p>



	<p>manually opened from the order. The lines for packaging items are added to the order upon posting the receipt or shipment.</p> <p><i>On Release</i> - The packaging calculations are initiated and the lines for packaging items are added to the order when the order is released.</p> <p>For more information, see Packaging calculations.</p>
<p>Calculate Packaging Per</p>	<p>Select the option based on which the packaging calculations should be handled when multiple items share the same packaging type and packaging location. This field is editable only when the Packaging Calculation Method field is set to <i>On Release</i>.</p> <p><i>Order</i> - The packaging calculations are performed when the order is released and the lines for packaging items are added to the order below the already existing lines. If multiple items in the order have the same packaging type and same packaging location, the quantity for the relevant packaging item is consolidated and presented as a single line.</p> <p><i>Item</i> – Packaging calculations are performed when the order is released and the lines for packaging items are added below each order line for which it is calculated. Even when multiple items in the order have the same packaging type and same packaging location, the packaging items are calculated separately, and their lines are added individually below each corresponding order line.</p> <p>For more information, see Packaging calculations.</p>
<p>Allow Recalculate Packaging</p>	<p>Turn on this toggle to automatically select the Allow Packaging Recalculation checkbox for each order line, which determines whether the quantity of the relevant packaging items should be automatically updated when the quantity of non-packaging items in the order is modified. The Allow Packaging Recalculation checkbox is available on the documents, such as sales orders, sales invoices, sales return orders, sales credit memos, purchase orders, purchase invoices, purchase return orders, purchase credit memos, and transfer orders. This toggle is editable only when the Packaging Calculation Method field is set to <i>On Release</i>.</p> <p>For more information, see Packaging calculations.</p>
<p>Round Order Bound Shipping Containers Per</p>	<p>Select the option that determines the sequence of operations, such as summing and rounding off, when calculating packaging quantity for combined order bound if multiple items within the order share the same packaging type and same packaging location. This field is editable only when the Packaging Calculation Method field is set to <i>On Release</i> and Calculate Packaging Per field is set to <i>Order</i>. This functionality works only</p>



	<p>for sales documents, such as sales orders, sales invoices, sales return orders, and sales credit memos.</p> <p><i>Order</i> – The calculated quantity for order bound packaging items is first summed across all order lines and then rounded off to the next whole integer.</p> <p><i>Order Line</i> – The quantity for order bound packaging items is calculated per line, rounded off to the next whole integer, and then these quantities are summed across all lines.</p> <p>For more information, see Packaging calculations.</p>
Prepayment Confirmation	Turn on this toggle if you want the system to display a confirmation message when the Post Prepayment Invoice action is executed for sales or purchase orders. For more information, see Packaging calculation with over under delivery .



Set up packaging types

Article • 3/12/2025 • 4 min read

You can link packaging types to an item number in order to manage stock levels and stock values for packaging. The system will create order lines and item ledger entries for transactions in which the packaging type is used. If no item is linked, the system will only register the packaging type code within transactions, without keeping stock of the packaging item.

An important condition for the items that are used as packaging is that these items have no item tracking code.



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

The **Packaging Types** page opens.

2. On the action bar, select **New**.
3. In the **Code** field, enter the required code of the packaging.
4. In the **Description** field, enter the required description of the packaging.

 **Note**

You can edit this value even if there are existing packaging entries for the packaging type.

The items linked to a packaging type are kept in inventory.

5. In the **Item No.** field, select the required item number linked to the packaging type from the drop-down menu.
6. In the **Shipping Type** field, select the required options from the drop-down menu. The related options are:

- **Shipping Container:** A Shipping Container is, for example, a pallet that contains stacked trade items such as cases or crates. The shipping containers are shipped as individual logistics units.
- **Shipping Unit:** A Shipping Unit is a transport item used to ship small quantities of one or more items such as cases, crates, or trays.

7. In the **Handling** field, select the handling type for the packaging item such as *Deposit* or *Lost*.

The packaging type is now set up.

 **Note**

In the case of partial transactions, if the value is changed in the second or upcoming transaction, the system considers the present value when the document is posted.



Setup wizard to create item for packaging types

You can create a packaging item using a function if the type of item for packaging does not already exist.

 Note

You cannot create packaging items for items with the **Order Tracking Policy** field value set to *Tracking Only* or *Tracking & Action Msg.* on the **Item Card** or the **Config. Template Header** page.

1. On the **Packaging Types** page, on the action bar, select **New** and enter the required code.
2. On the action bar, select **Actions > Create item for Packaging type**.

The item templates are shown on the **Item Templates** page, and you can set up an item template dedicated to packaging items.



Register packaging setup

Article • 2/5/2025 • 3 min read

To enable the automatic calculation of packaging for inbound and outbound transactions, you need to select specific checkboxes for each location. You can select these checkboxes when registering packaging. However, if packaging is registered with a scanner or another extension, you can clear the checkbox to avoid double registration of packaging.



1. Select the Search icon , enter **Register Packaging Setup**, and then choose the related link.
The **Register Packaging Setup** page opens.
2. In the **Location Code** field, select the required location from the drop-down menu.
3. Select the **Inbound Transactions** checkbox to register the packaging for the inbound transaction automatically.

When the **Inbound Transactions** checkbox is selected, (purchase orders, incoming transfer orders, and sales return orders) on a specific location, packaging will be automatically calculated when opening the packaging screen and the item bound packaging will be automatically posted on the receipt. It works similarly for outbound transactions.

4. Select the **Outbound Transactions** checkbox to register the packaging for outbound transactions automatically.
The register packaging setup is now complete.

Note

Deleting the location in the **Packaging Location** field on the **Location Card** page does not completely remove it. To completely delete it, you must also delete the location from the **Register Packaging Setup** and the **Locations** page.



Set up packaging locations

Article • 2/5/2025 • 3 min read

The Packaging Location must be linked to a location. The packaging location is used for automatic packaging postings.

Note

Ensure that a Direct Posting location is selected as the **Packaging Location** on the **Location Card** page. To know more about posting, see [Set Up Posting Groups](#).

Setup wizard to create packaging locations and register packaging setup

If the packaging location is empty on the **Locations** page, Dynamics 365 Business Central has a setup wizard that can assist in setting up a packaging location and defining the setup of incoming and outgoing transactions.

1. Open the **Locations** page, on the action bar, select **New**.
The **Location Card** page opens.
2. In the **Code** field, enter the required code.
3. On the action bar, select **Create Packaging Location**.
4. On the **Packaging Location Setup Wizard** page, complete the required setups.
After finishing the setup wizard, the packaging location is set up.

Note

The linked packing location is shown in the **Packaging Location** field under the **Warehouse** FastTab on the **Location Card** page.

Link packaging location to a location



1. Select the Search icon , enter **Locations**, and then choose the required option.
2. On the **Locations** page, in the **Code** field, select the required code.
The **Location Card** page.
3. On the **Warehouse** FastTab, in the **Packaging Location** field, select the required location from the drop-down menu.



 **Important**

The packaging location should be set as a direct posting location.



Set up customers/vendors

Article • 2/5/2025 • 4 min read

You can configure packaging setup for customers and vendors, which involves defining consolidation accounts and determining responsibility for handling shipping units and containers to calculate packaging balances. The following procedure describes how to perform this activity.



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

The **Customers** list page opens.

2. Select the required **No.**.

The **Customer Card** page opens.

3. On the action bar, select **Related > Customer** and select the following actions as required:

- **Packaging Setup:** Opens the **Packaging** page for the specific customer.
- **Default Packaging:** Opens the **Default Packaging** page for the specific customer.

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

Field	Description
Consolidation Account	<p>Enter the name of a group of customers/vendors that collectively report outstanding packaging balances. This account groups customers/vendors reporting on outstanding packaging balances together and then used for all packaging transactions. When a customer is also set up as a vendor, the same consolidation code is used on both master data cards to consolidate both packaging accounts.</p> <p>To ensure accurate accounting for multiple customers/vendors reporting packaging under the same reference account number, it is essential to configure all customer/vendor cards with an identical code as the consolidation account.</p>
Round order Bound Shipping Containers Per	<p>Select the option that determines the sequence of operations, such as summing and rounding off, when calculating packaging quantity for combined order bound if multiple items within the order share the same packaging type and same packaging location. This field is editable only when the Packaging Calculation Method field is set to <i>On Release</i> and Calculate Packaging Per field is set to <i>Order</i>. This functionality</p>



works only for sales documents, such as sales orders, sales invoices, sales return orders, and sales credit memos.

Order – The calculated quantity for the packaging item is summed first and then rounded off.

Order Line – The calculated quantity for the packaging item is rounded off first and then summed.

If this field is left blank, the option selected in the **Round Order Bound Shipping Containers Per** field on the **Packaging Setup** page will be considered for this customer.

5. On the **Responsibility** for FastTab, enter the required information in the following fields:

Field	Description
Shipping Units	Select the entity responsible for shipping packaging units for this document. The available options are: <i>Customer</i> , <i>Shipping Agent</i> , and blank. This selection is utilized to compute the packaging balances for either the customer or the shipping agent. The field is set to <i>Customer</i> by default.
Shipping Container	Select the entity responsible for shipping packaging containers for this document. The available options are: <i>Customer</i> , <i>Shipping Agent</i> , and blank. This selection is utilized to compute the packaging balances for either the customer or the shipping agent. The field is set to <i>Customer</i> by default.

 **Note**

The values in the **Responsible Shipping Units Balance** and **Responsible Shipping Container Balance** fields are automatically populated in the respective fields on the **Sales Order/Purchase Order** page when the specific customer/vendor is selected.

Similarly, you can configure this setup for a vendor on the **Vendor Card** page as well.



Default and Mandatory Packaging

Article • 4/3/2023 • 5 min read

You can define a mandatory shipping container on the ship-to address to meet specific customer requirements. Once selected, no other shipping containers can be registered for the customer.

To set up the default packaging of an item, you can specify the quantity per packaging on the **Item Card**. This setup is considered when placing orders with a particular vendor, as well as customer-specific setup in sales orders. The packaging quantities are automatically calculated when transactions for the specific items are entered. The packaging can be **Item bound** or **Order bound**.

Item Bound Packaging is an inherent part of the item definition and is shipped/received with the purchase/sales item by default. It cannot be changed within a transaction if it is linked to an item.

Order Bound Packaging is more flexible, as users can change the quantities and types shipped/received on a transactional level, except for mandatory shipping containers.

Default Packaging



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

The **Items** page opens.

2. Select the required **No.** to open the **Item Card** page.

3. On the action bar, select **Item > Default Packaging**.

4. On the **Default Packaging** page, on the action bar, select **New**.

5. In the **Type** field, select the required option from the drop-down menu.

6. In the **Packaging Code** field, select the type of packaging from the drop-down menu.

7. In the **Quantity Packaging** field, enter the related quantity.

You can select default packaging for a specific vendor or customer.

During a transaction, the system determines which packaging is used for the *Shipping Container* and *Shipping Unit* types. Firstly, the system checks if the combination of item packaging, customer/vendor, and address is available. If so, this type of packaging is used. If not, the system checks whether the combination of packaging and vendor/customer is present. In the absence of the combination of packaging and vendor/customer, the packaging set up for just the item is used. This hierarchy of packaging is also applied when enforcing shipping containers when picking for SSCC customers via the handheld device.

8. In the **Source Type** field, select the required source type from the drop-down menu.

9. In the **Source No.** field, select the number of the customer/vendor from the drop-down menu.

10. In the **Ship-to/Order Address** field, enter the related address.

The Default item packaging is now set up.



Mandatory Packaging

Sometimes customers require a specific shipping container for all items, regardless of the item being shipped. To enforce this requirement, you can define a mandatory shipping container on the customer's ship-to address. Once a mandatory shipping container is selected, no other shipping containers can be used for transactions involving this customer.



1. Select the Search icon  , enter **Customers**, and then choose the related link.
The Customers page opens.
2. Select the required **No.** to open the **Customer Card** page.
3. On the action bar, select **Related > Customer > Ship-to Addresses**.
4. On the **Ship-to Address List** page, in the **Code** field, select the required code.
The **Ship-to Address** page opens.
5. On the **General FastTab**, in the **Mandatory Shipping Container** field, select which shipping container is mandatory for this customer ship-to address from the drop-down menu.

The mandatory shipping container is now set up.

In a transaction, the system will always suggest the shipping container if it is set up as mandatory. Any other shipping containers that are set up on the item/customer level are omitted from the calculation.



Inbound Transactions

Article • 6/13/2024 • 8 min read

During a transaction, the default item packaging may or may not have been calculated in advance, depending on the **Inbound Transactions** checkbox on the [Register Packaging Setup](#) page. See [Register Packaging Setup](#) for more information. Packaging can also be registered manually on every inbound transaction. On the following inbound transactions, you can register the packaging:

- Purchase Order
- Warehouse Receipt
- Purchase Invoice
- Sales Return Order
- Sales Credit Memo

When item packaging is set up for document lines, the system displays default packaging and automatically calculates packaging quantity. The following segments will concentrate on packaging management while utilizing the **Create document** and **Correct document** functions, followed by an overview of packaging registration during diverse transactions, including inbound transactions that are directly posted and inbound warehouse transactions that are not directly posted (e.g., warehouse receipt and inventory put away).

Functions to create documents

The following functions help you create the inbound transaction documents:

- **Function Copy documents from various order types:** When executing the **Copy documents** function, if a document with packaging lines that were automatically added through the packaging module is selected, the system will not duplicate these lines in the new document. This is done to prevent the packaging from being added twice. It is recommended that the user verifies the packaging calculations by navigating to **Order > Packaging** and posting them. Once this is done, the order lines will be automatically inserted.
- **Function Get posted document lines to reverse from various order types:** When the **Get Posted Document Lines to Reverse** functions are executed, the system will not copy the automatically added packaging lines to the new document. This is done to prevent the packaging from being added twice. It is recommended that the user verifies the packaging calculations by navigating to **Order > Packaging** and posting them. Once this is done, the order lines will be automatically inserted.

Functions to correct documents

You must manually undo the shipment of the linked packaging line when undoing the shipment of a purchased or produced item with linked packaging. It is not done automatically.



When shipment lines for packaging items are undone, the packaging administration (packaging entries and packaging specification) is not updated automatically, and the user needs to do it manually.

Function Correct on purchase invoice

When executing the **Correct Purchase Invoice** function, the system will first create a credit memo in which trading items and packaging items are reversed. Afterwards, the system will recreate the purchase invoice header, but will omit packaging lines that were created by the system in the original transaction. This is done to prevent the packaging from being added twice when the corrective purchase invoice is posted.

Function Corrective credit memo

When executing the **Corrective Credit Memo** function from the sales invoice, the system will create a credit memo in which trading items are reversed. Lines for packaging item(s) are copied as well. The lines must be deleted before posting the corrective credit memo, otherwise the packaging lines will be registered twice.

Direct posted inbound transactions

Packaging can be registered in all transactions. After registration, a real-time overview of outstanding packaging balances per customer is shown in the packaging entries. If an item is linked to a packaging type, an item ledger entry is also created for this item when posting an inbound transaction.

Calculation for packaging lines

In inbound transactions, a user can perform different actions that can affect the created packaging lines. These actions only have an effect when packaging lines are automatically calculated instead of manually added (i.e., when the **Inbound Transactions** checkbox is selected on the **Register Packaging Setup** page).

The work instructions for all direct posted inbound transactions are the same. You can register the packaging in the Purchase Orders with the following steps:



1. Select the Search icon , enter **Purchase Orders** and choose the related link.
The **Purchase Orders** page opens.
2. Select **New** on the action bar of the **Purchase Orders** page to create a new entry.
3. On the **General** FastTab, in the **Vendor No.** field, select the vendor number.
4. On the **Shipping and Payment** FastTab, in the **Units** and **Container** fields, the values are inherited from the respective fields of the **Packaging** setup of the selected vendor. You can modify the value even after it is inherited. These fields are also available on the following pages:



- Purchase Invoice
- Purchase Order Archive
- Sales Return Order
- Sales Credit Memo
- Sales Return Order Archive

 Note

Ensure the shipping **Agent** field on the **Shipping and Payment** FastTab has a value if either of the above fields has a value assigned as *Shipping Agent*. Also, in the case of partial transactions, if the values of the **Units** and **Container** fields are changed in the second or upcoming transaction, the system considers the present value when the document is posted.

1. On the **Lines** FastTab, enter the desired values in the **No.**, **Quantity**, and **Qty. to Receive** fields.

 Note

The **Qty. to Receive** field must be filled to view the packaging calculation.

After this step, this process continues in the packaging calculations topic. You can perform packaging calculations when the document is released or posted. For more information, see [Packaging calculations](#).

Inbound Warehouse transactions

Depending on the **Inbound Transactions** checkbox on the **Register Packaging Setup** page, the default packaging is automatically calculated in inbound warehouse receipts based on the **Quantity to Receive** field. For more information, see [Register Packaging Setup](#). You can add or change the outbound order packaging. When the location requires a warehouse receipt the system calculates the default packaging in the warehouse receipt and not in the purchase order.

It is important to know that default packaging in orders with a warehouse receipt is only calculated in the warehouse receipt and not in the order itself.



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

The **Warehouse Receipts** page opens.

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



The **Warehouse Receipt** page opens.

3. In the **No.** field, enter the related number of the warehouse receipt.
4. In the **Location Code** field, select the related code for the location.
5. On the action bar, select **Prepare > Get Source Documents**.

The **Source Documents** page opens.

6. Select the purchase order document(s).

After this step, this process continues in the packaging calculations topic. You can perform packaging calculations when the document is released or posted. For more information, see [Packaging calculations](#).



Outbound Transactions

Article • 6/13/2024 • 8 min read

Depending on the **Outbound Transactions** checkbox on the [Register Packaging Setup](#) page, the default item packaging may or may not have been calculated in advance. For more information, see [Register Packaging Setup](#). Packaging can be registered manually on every outbound transaction. On the following outbound transactions, you can register the packaging:

- Sales Order
- Warehouse Shipment
- Purchase Return Order
- Sales Invoice
- Purchase Credit Memo

When item packaging is configured for document lines, the system displays default packaging and automatically calculates packaging quantity. Sections ahead will cover packaging management while using Create and Correct document functions, and later parts will demonstrate how packaging is recorded during various transactions, including outbound transactions that are directly posted and outbound warehouse transactions that are not directly posted (e.g., warehouse shipment and inventory pick).

Functions to create documents

The following functions help you create the inbound transaction documents:

- **Function Copy documents from various order types:** When executing the **Copy documents** function, if a document with packaging lines that were automatically added through the packaging module is selected, the system will not duplicate these lines in the new document. This is done to prevent the packaging from being added twice. It is recommended that the user verifies the packaging calculations by navigating to **Order > Packaging** and posting them. Once this is done, the order lines will be automatically inserted.
- **Function Get posted document lines to reverse from various order types:** When the **Get Posted Document Lines to Reverse** functions are executed, the system will not copy the automatically added packaging lines to the new document. This is done to prevent the packaging from being added twice. It is recommended that the user verifies the packaging calculations by navigating to **Order > Packaging** and posting them. Once this is done, the order lines will be automatically inserted.

Functions to correct documents

You must manually undo the shipment of the linked packaging line when undoing the shipment of a purchased or produced item with linked packaging. It is not done automatically.



When shipment lines for packaging items are undone, the packaging administration (packaging entries and packaging specification) is not updated automatically, and the user needs to do it manually.

Function Correct on the sales invoice

When executing the **Correct Sales Invoice** function, the system will first create a credit memo in which trading items and packaging items are reversed. Afterwards, the system will recreate the purchase invoice header but will omit packaging lines that were created by the system in the original transaction. This is done to prevent the packaging from being added twice when the corrective purchase invoice is posted.

Function Corrective credit memo

When executing the **Corrective Credit Memo** function from the sales invoice, the system will create a credit memo in which trading items are reversed. Lines for packaging items are omitted. This is done to prevent the packaging from being added twice when the corrective credit memo is posted.

Directly posted outbound transactions

Packaging can be registered in all transactions. After registration, a real-time overview of outstanding packaging balances per customer is shown in the packaging entries.

Calculation for packaging lines

In outbound transactions, a user can perform different actions that can affect the created packaging lines. These actions only have an effect when packaging lines are automatically calculated instead of manually added (i.e., when the **Outbound Transactions** checkbox is selected on the **Register Packaging Setup** page).

The work instructions for all the directly posted outbound transactions are the same. You can register the packaging in the sales order with the following steps:



1. Select the Search icon , enter **Sales orders** and choose the related link.
The **Sales Orders** page opens.
2. Select **New** to open the **Sales Order** card page and create a new entry.
3. On the **General** FastTab, in the **Customer No.** field, select the customer number.
4. On the **Shipping and Billing** FastTab, in the **Units** and **Container** fields, the values are inherited from the respective fields of the **Packaging** setup page of the selected customer. You can modify the value even after it is inherited. These fields are also available on the following pages:



- Purchase Return Order
- Purchase Credit Memo
- Purchase Return Order Archive
- Sales Order
- Sales Invoice
- Sales Order Archive

 Note

Ensure the shipping **Agent** field on the **Shipping and Billing** FastTab has a value if either of the above fields has a value assigned as *Shipping Agent*. Also, in the case of partial transactions, if the values of the **Units** and **Container** fields are changed in the second or upcoming transaction, the system considers the present value when the document is posted.

1. On the **Lines** FastTab, enter the desired values in the **No.**, **Quantity**, and **Qty. to Ship** fields.

 Note

The **Qty. to Ship** field must be filled to view the packaging calculation.

After this step, this process continues in the Packaging calculations topic. You can perform packaging calculations when the document is released or posted. For more information, see [Packaging calculations](#).

Outbound warehouse transactions

Depending on the **Outbound Transactions** checkbox on the **Register Packaging Setup** page, the default packaging is automatically calculated in outbound warehouse shipments based on the **Quantity to Ship** field. For more information, see [Register Packaging Setup](#). You can add or change the outbound order packaging. When the location requires a warehouse shipment the system calculates the default packaging in the warehouse shipment and not in the sales order.

The work instructions for all outbound warehouse transactions are the same. You can register the packaging in the Warehouse Shipment with the following steps:



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

The **Warehouse Shipments** page opens.

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



The **Warehouse Shipment** page opens.

3. In the **No.** field, enter the related number of the warehouse shipment.
4. In the **Location Code** field, select the related code for the location.
5. On the action bar, select **Prepare > Get Source Documents**.

The **Source Documents** page opens.

6. Select the sales order document(s).

After this step, this process continues in the packaging calculations topic. You can perform packaging calculations when the document is released or posted. For more information, see [Packaging calculations](#).



Packaging calculations

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Performing packaging calculations for items in the source documents can be done either when the document is released or posted, depending on the configuration in the **Packaging Calculation Method** field on the [Packaging Setup](#) page.

The calculation is based on the following formula:

Required quantity of the packaging type = Quantity of the item / **Quantity Per Packaging** (obtained from the **Default Packaging** page for the respective item).

The system determines the location for calculation based on the option selected in the **Packaging Location by** field on the [Packaging Setup](#) page. The packaging location should be configured on the relevant **Location Card** page of the item. If it is not configured, the **Default Packaging Location** field value on the **Inventory Setup** page is considered. Also, the relevant packaging location must be made an entry on the **Register Packaging Setup** page.

Packaging calculation methods

Manual

When the **Packaging Calculation Method** field on the [Packaging Setup](#) page is set to *Manual*, the packaging calculations are performed, and the packaging lines are added to the lines only when the document is posted. Also, you can view the calculated quantities for packaging items on the [Packaging Transaction](#) page, before posting the document. The following procedures describe how to perform this activity.

Here, we are using a purchase order as an example. This procedure is a continuation of the process explained in the Calculation for packaging lines section. For more information, refer to the sections on [Inbound Transactions](#) and [Outbound Transactions](#).

1. Open the [Purchase Order](#) page.
2. Perform the steps explained in the [Calculation for packaging lines](#) section.
3. On the action bar, select **Order > Packaging** to view the calculation for packaging.

The [Packaging Transaction](#) page opens.

Note

To open the [Packaging Transaction](#) page from the [Sales Return Order](#) page, select **Related > Return Order > Packaging** on the action bar.



Upon opening the **Packaging Transaction** page, if the packaging type is linked to the item(s) in the order, the system automatically performs packaging calculations for both order and item levels. The required quantity for each packaging type is displayed in the **Quantity To Post** field on the **Order Bound Packaging** and **Item Bound Packaging** FastTabs.

The fields on the **Order Bound Packaging** FastTab are editable, whereas the fields on the **Item Bound Packaging** FastTab are not.

If modifications are made to the order, such as adding a new item or modifying item quantities, the calculations on the **Item Bound Packaging** FastTab are automatically updated upon reopening the **Packaging Transaction** page. However, the calculations for the **Order Bound Packaging** FastTab can be updated by manually selecting the **Recalculate Packaging** action.

The system performs the calculation according to the packaging calculation formula mentioned above.

Note

The **Quantity Per Packaging** field value is sourced from the *Item Bound* type for item bound packaging calculations and the *Order Bound* type for order bound packaging calculations.

If multiple items in the document have the same packaging type and location, the system calculates the required quantity of packaging type individually for each item. The outcomes are then summed, and the total is rounded off to the next whole integer. This function is applicable only for order bound packaging.

For example, consider the following scenario:

Items and packaging details

- Item A has a packaging location X and the Quantity per Packaging for the packaging type P is 3.
- Item B has a packaging location Y and the Quantity per Packaging for the packaging type L is 7.
- Item C has a packaging location Y and the Quantity per Packaging for the packaging type L is 10.

Purchase Order quantities

- Item A = 20
- Item B = 25
- Item C = 22

Packaging calculation

1. For item A, the required quantity of packaging type P = $20/3 = 6.6 = 7$ (Rounded off to the next whole integer).



2. For items B & C,

- Required quantity of packaging type L for item B = $25/7 = 3.5$
- Required quantity of packaging type L for item C = $27/10 = 2.2$

The system sums the outcome quantities since Items B and C have the same packaging type L and packaging location Y.

Total required quantity of packaging type L = $3.5 + 2.2 = 5.7 = 6$ (Rounded off to the next whole integer)

This calculation works similarly for both order bound packaging and item bound packaging. However, consolidating the quantity for packaging types when multiple items share the same packaging type and packaging location is performed only for order bound packaging.

Furthermore, if the document has multiple lines, only the lines with values in the **Qty. to Receive** field are considered for packaging calculations. The relevant lines for packaging items are added to the document upon posting.

This functionality is applicable even in the case of partial receipts for documents such as purchase orders and sales return orders. Initially, the packaging calculation is performed only for the quantity in the **Qty. to Receive** field during the first partial receipt, and the relevant lines for packaging items are added to the original document upon posting the warehouse document. Subsequently, the packaging calculation can be performed again for the subsequent quantity in the **Qty. to Receive** field, and the relevant lines will be added to the original document when it is posted again.

1. Select **Close** on the **Packaging Transaction** page.

A summarized view of added packaging (packaging types and quantities) is available in the **Total Packaging** Factbox. This Factbox is available on all document types to which packages can be added.

1. On the **Purchase Order** page, on the action bar, select **Post**.

After posting, the packaging items calculated on the **Packaging Transaction** page are added to the order lines. Additionally, the relevant packaging types and quantities are registered on the [Packaging Entries](#) page.

On Release

When the **Packaging Calculation Method** field on the **Packaging Setup** page is set to **On Release**, the packaging calculations are performed, and the packaging lines are added to the lines when the document is released. The following procedures describe how to perform this activity.

Here we have taken a sales order as an example. This procedure is a continuation of the process explained in the Calculation for packaging lines section. For more information, refer to the sections on [Inbound Transactions](#) and [Outbound Transactions](#).

1. Open the **Sales Order** page.

2. Perform the steps explained in the [Calculation for packaging lines](#) section.



3. On the action bar, select **Home > Release**.

The system checks for the packaging type that is linked to the item(s) in the order and performs packaging calculations for both order and item levels based on the above-mentioned packaging calculation formula.

Note

In this scenario, the **Packaging** action is disabled in the document, preventing access to the **Packaging Transaction** page. If you want to manually add packaging items to the sales, purchase, or transfer order lines, select **Line > Add Packaging** on the action bar.

The packaging calculations for the *On Release* packaging calculation method work similarly to the Manual packaging calculation method, with the following additional features:

Calculate Packaging Per

If multiple items in the document have the same packaging type and packaging location, you can determine whether the system should calculate and consolidate the required quantity of packaging type for Order Bound Packaging. This function works based on the configuration in the **Calculate Packaging Per** field on the [Packaging Setup](#) page.

- When this field is set to *Order*, the packaging calculations for order bound packaging for the relevant items are consolidated and presented as a single line if it meets the criteria specified above. This consolidated line is presented above all the lines of packaging items.
- When this field is set to *Item*, the packaging calculations for order bound packaging are performed and presented separately for each item, regardless of whether they meet the criteria specified above. These individual lines for packaging items are grouped under the respective items that they are associated with.

Note

The system supports underdelivery functionality for packaging lines when the **Packaging Calculation Method** field value is set to *On Release* and when the **Calculate Packaging Per** field value is set to *Item* or *Order*. Additionally, this functionality is available only when the Aptean [Over Under Delivery](#) extension is installed, the **Allow Recalculate Packaging** toggle is turned on, and the **Allow Packaging ReCalculation** checkbox is selected on the **Packaging Setup** page.

Round Order Bound Shipping Container Per

The Round Order Bound Shipping Container Per function determines the sequence of operations, such as summing and rounding off while the system performs the packaging calculations if the **Calculate Packaging Per** field is set to *Order*. This function works based on the configuration in the **Round Order Bound Shipping Containers Per** field on



the [Packaging Setup](#) page for customers. If this is left blank, the value in the **Round Order Bound Shipping Containers Per** field on the [Packaging Setup](#) page is considered. This Round Order Bound Shipping Per functionality applies only to the sales documents.

- When this field is set to *Order*, the system calculates the required quantity of packaging type individually for each item that meets the above criteria. The outcomes are summed first, and then the total is rounded off to the next whole integer. This process works similarly to the example provided in the *Manual* packaging calculation method.
- When this field is set to *Order Line*, the system calculates the required quantity of packaging type individually for each item that meets the above criteria. Each item's outcome is individually rounded off first to the next whole integer and then the rounded values are summed. For example, consider the following scenario:

Items and packaging details

- Item A has a packaging location X and the Quantity per Packaging for the packaging type P is 3.
- Item B has a packaging location Y and the Quantity per Packaging for the packaging type L is 7.
- Item C has a packaging location Y and the Quantity per Packaging for the packaging type L is 10.

Purchase Order quantities

- Item A = 20
- Item B = 25
- Item C = 22

Packaging calculation

1. For item A, the required quantity of packaging type P = $20/3 = 6.6 = 7$ (Rounded off to the next whole integer).
2. For items B & C,
 - Required quantity of packaging type L for item B = $25/7 = 3.5 = 4$ (Rounded off to the next whole integer).
 - Required quantity of packaging type L for item C = $27/10 = 2.2 = 3$ (Rounded off to the next whole integer).

The system first rounds off the outcome quantities individually since Items B and C have the same packaging type L and packaging location Y. Then the values are summed.

Total required quantity of packaging type L = $4 + 3 = 7$.

Once the document is released, the packaging calculations are performed, and the packaging lines are added to the document lines.

You can also adjust the quantity required for packaging types as needed.



Additionally, the following checkboxes on the lines indicate statuses and enable the process of packaging calculations.

Checkbox	Description
Allow Packaging ReCalculation	<p>Select the checkbox to allow the system to recalculate the quantity for the packaging item whenever there is a change in the quantity of the items, location, or any other factor affecting the packaging calculations. This checkbox is editable only for lines containing packaging items.</p> <p>This checkbox is automatically checked when the Allow Recalculate Packaging toggle is turned on and it is automatically cleared when that toggle is turned off. Subsequently, you can manually select or clear the checkbox as needed.</p>
Packaging Calculated	<p>Specifies whether packaging calculations are performed for the item in the line. This checkbox is selected even for items that have no configuration for packaging types, as packaging calculations are still performed for these items. This function is applicable only for lines containing food items and it cannot be manually edited.</p>
Automated Packaging	<p>Specifies whether the line for the packaging item is automatically generated when the packaging calculations are performed. This checkbox is cleared for the packaging items in the lines that are added manually.</p> <p>This function is applicable only for lines containing packaging items and it cannot be manually edited.</p>

1. On the action bar, select **Home > Release** to release the document.

After releasing the document, the calculated packaging items are added to the order lines.

If you reopen the document and change or clear the location determined for calculation, the system will automatically delete the lines of relevant packaging items.

 **Note**

The packaging items and quantities on the order lines are registered on the **Packaging Entries** page only after the document is posted. For more information, see [Packaging Entries](#).

Packaging calculation with over under delivery

- When the **Underdelivery** checkbox is selected for the item line on the **Sales Order** and **Warehouse Pick** pages for both direct posting and warehouse locations and then the documents are posted, the associated packaging lines (both item-bound and order-bound) are recalculated along with the updated **Underdelivery** checkbox.



Additionally, the associated **Outstanding Quantity** and **Qty. to Ship** field values are set to *0*. This functionality works similarly for purchase orders also.

Note

- When the **Qty. to Ship** field value is manually set to empty/blank and the **Underdelivery** checkbox is selected for the sales line on the **Sales Order** page, the system recalculates the quantity on the packaging lines to the actual quantity. Additionally, the **Shipment Variance** field value is recalculated.
- For order-bound packaging lines, the **Underdelivery** checkbox is selected only when the shipment is complete. For order-bound packaging lines, the **Underdelivery** checkbox is selected only when the shipment is complete and there are multiple main items linked to the same default order-bound packaging item. In such cases, the **Underdelivery** checkbox is selected only if at least one of the main item lines has this checkbox selected.

- When the **Underdelivery** checkbox is selected for the item line on the **Inventory Pick** page and the **Qty. to Handle** field value is updated during the pick and put-away process on the **Sales Order** page and then posted, the associated packaging lines (both item-bound and order-bound) are recalculated along with the updated **Underdelivery** checkbox. Additionally, the associated **Outstanding Quantity** field value is set to *0* after posting.
- When the unexpected item is added to the purchase order via the **Add Unexpected Item** action for a selected line with the **Underdelivery** checkbox selected on the **Warehouse Receipt** page, the associated packaging lines are recalculated along with the updated **Underdelivery** checkbox and added to the **Warehouse Receipt** and **Purchase Order** pages. Additionally, the associated **Outstanding Quantity** field value is set to *0* after posting.
- When the **Set Outstanding Lines to Underdelivery Rule** field value is set to *Unlimited* on the **Over & Underdelivery Setup** page, the system allows underdelivery for any required value in the **Qty. to Ship** field ignoring the associated **Allowed Underdelivery %** field value that is already defined for the item.
- When the **Set Outstanding Lines to Underdelivery Rule** field value is set to *Respect Allowed Percentages* on the **Over & Underdelivery Setup** page, the system does not consider the **Allowed Underdelivery %** field value for the packaging lines as it is system generated.
- You must provide the **Over & Underdelivery Reason Code** field value for the main item line on the **Purchase Order** or **Sales Order** page, if not the system displays an error message.



Packaging in Transfer Order

Article • 2/14/2025 • 2 min read

Packaging can be registered manually on every **Transfer Order**. If an inbound warehouse transaction is needed, packaging must be registered separately in the transfer order. The warehouse transactions packaging is registered separately in,

- Inventory Put Away
- Warehouse Receipt

You can register the packaging in the transfer order along with the warehouse shipment or warehouse receipt by following these steps:

1. Open a transfer order and fill in the necessary fields.
2. On the **Lines** FastTab, in the **Item No.** and **Quantity** fields, enter the required number and quantity of the item.
3. On the action bar, select **Related > Order > Packaging**.

The **Packaging Transaction - Transfer Order** page opens.

You can view the Order Bound Packaging and Item Bound Packaging records on the **Packaging Transaction** page. When packaging is linked to the item(s) in the order, the system will automatically calculate and show the packaging type and quantities.

The quantities and types of the Order Bound Packaging can be changed. You cannot change the Item Bound Packaging.

4. Select **Close**.
5. On the **Transfer Order** page, on the action bar, select **Posting > Post**.

6. Select **Ship**.

After shipping the transfer order, the packaging that is selected on the **Packaging** page is shown on the Transfer Lines.

7. On the **Transfer Order** page, on the action bar, select **Create Whse. Receipt**.

The Packaging is not added to the Warehouse Shipment because the packaging is placed in a location that is on direct booking.

8. In the **Qty. to Receive** field, enter the required value.
9. Select **Post Receipt**.

If the **Packaging Calculation** field is set to **Manual** on the **Packaging Setup** page, the system updates the **Quantity** field value on the **Posted Warehouse Receipts** page when the order is fully posted. When it is partially posted, the system updates the **Quantity Received** field on the **Transfer Order** page.

The system transfers package-related information, such as packaging calculated, packaging transaction type, and non-packaging item reference number, from the **Transfer Order** page to the associated **Posted Transfer Receipt** and **Posted Transfer Shipment** pages.



Packaging Balance

Article • 6/13/2024 • 3 min read

You can view the packaging balances for specific shipping agents, customers, and vendors for the packaging types that are managed by them. To do so, follow these steps:



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

The **Shipping Agents** page opens.

2. Select the shipping agent for whom you want to view the packaging balance.
3. On the action bar, select **Shipping Agent > Packaging Balance**.

The **Packaging Balance** page opens for the selected shipping agent.

You can view the outstanding packaging balance for all packaging types managed by the selected shipping agent. This list is filtered from the **Packaging Entries** page based on the values in the **Responsibility Type** and **Responsibility Code** fields.

Similarly, you can view the packaging balances for specific customers and vendors by selecting **Related > Customer** or **Vendor > Packaging Balance** on the respective **Customer Card** and **Vendor Card** pages. If a customer has a positive balance, it means that they have received more of the packaging type than they have returned. On the other hand, if a vendor has a positive balance, it means that they have returned less of the packaging type than they have supplied.

Correct Balance

In certain scenarios, discrepancies may arise where a customer, vendor, or shipping agent reports different outstanding packaging quantities compared to what is displayed in your packaging administration. To rectify this, adjustments can be made to the packaging administration, thereby adjusting the packaging entries. These adjustments only affect the packaging administration and do not impact the item ledger entries. Consequently, the stock levels for the packaging items remain unaffected by these adjustments. To do so, follow these steps:

1. On the action bar, select **Correct Balance**.

The confirmation dialog box appears.

2. In the **New Quantity** field, enter the desired total outstanding balance for the packaging type.
3. Select **Yes**.

A notification appears indicating the quantity added to the outstanding balance. Furthermore, an entry will be created on the **Packaging Entries** page for the specific packaging type, detailing the relevant shipping agent and



Packaging

document type as *Correction*.



View consolidated packaging balances

Article • 11/26/2025 • 3 min read

You can view the total packaging balance for all customers and vendors associated with a consolidated account.

1. Navigate to the **Customer Card** or **Vendor Card** page.

2. Select the **Packaging Balance** action.

The **Packaging Balance** page opens.

3. Select the **Balance per Consolidated Account** action.

The **Packaging Balance by Consolidated Account** page opens and displays consolidated packaging information.

4. The **Packaging Balance by Consolidated Account** page displays the following information:

Field	Description
Packaging Code	Specifies the code that identifies the packaging type.
Packaging Description	Specifies the description of the packaging type.
Consolidation Account	Specifies the consolidated account associated with the packaging entries.
Customer Balance	Specifies the total quantity of packaging received by all customers in the consolidated account. The system calculates this value by summing packaging entries where the Responsibility Center field value is set to <i>Customer</i> . You can select this field to view the filtered packaging entries.
Vendor Balance	Specifies the total quantity of packaging sent by all vendors in the consolidated account. The system displays this value with an opposite sign compared to the Quantity field in packaging entries. The system calculates this value by summing packaging entries where the Responsibility Center field value is set to <i>Vendor</i> . You can select this field to view the filtered packaging entries.
Total Balance	Specifies the net packaging balance for the consolidated account. The system calculates this value as customer balance + vendor balance. You can select this field to view the filtered packaging entries.

Note

The **Balance per Consolidated Account** action is not available when you open the **Packaging Balance** page from a shipping agent.

When multiple customers and vendors belong to the same consolidated account:

- Vendor X sends 10 CHEP pallets



- Vendor Y sends 15 CHEP pallets
- Customer Z receives 5 CHEP pallets
- Customer A receives 10 CHEP pallets

The system displays the following values for the CHEP packaging line:

- Customer Balance: 15 ($5 + 10$)
- Vendor Balance: -25 ($-(10 + 15)$)
- Total Balance: -10 ($15 - 25$)

Configure consolidated account validation

The system validates consolidated account configuration on the **Default Packaging** page to ensure that shipping units and shipping containers are properly configured when using consolidated accounts.

The system displays an error message in the following scenarios:

- You enter a value in the **Consolidation Account** field when both the **Shipping Units** and **Shipping Container** field values are set to *Shipping Agent* or left blank.
- You change the **Shipping Units** field value to *Shipping Agent* or clear the field when the **Shipping Container** field value is set to *Shipping Agent* or blank and the **Consolidation Account** field contains a value.
- You change the **Shipping Container** field value to *Shipping Agent* or clear the field when the **Shipping Units** field value is set to *Shipping Agent* or blank and the **Consolidation Account** field contains a value.



Packaging Entries

Article • 6/13/2024 • 4 min read

A separate administration of packaging entries is created as transactions containing packaging items are posted. These packaging entries are created only from purchase and sales orders. To access these entries:



Select the Search icon  , enter **Packaging Entries**, and then choose the related link.

The **Packaging Entries** page opens.

The **Packaging Entries** page will provide an overview of outstanding packaging balances at either the customer or vendor (group) level or for the shipping agent. On this page, you can observe the responsible individual for managing the packaging type. This information is displayed in the **Responsibility Type** and **Responsibility Code** fields for each specific entry. For instance, if the **Responsibility Type** field is designated as *Customer*, then the **Responsibility Code** field will display the customer number.

Correct Packaging Entries

In specific scenarios, you may need to change the responsible individual for packaging entries due to reasons such as shifts in responsibilities, or the need for more accurate tracking of packaging management. In such instances, you have the option to alter them by assigning a different responsibility type and person.

The following procedures describe how to perform this activity.

1. Open the **Packaging Balance** page from the relevant **Customer Card**, **Vendor Card**, or **Shipping Agents** page associated with the individual whose responsibility you want to change.
2. In the **Balance** field, select the value for the relevant packaging type.

The **Packaging Entries** page opens and displays the existing packaging entries related to the responsible person.

3. Select an entry for which you want to change the responsibility.
4. On the action bar, select **Correct Packaging Entries**.

A dialog box appears.

5. In the **Responsibility Type** field, select the relevant type for the new responsible individual.

However, there are certain restrictions depending on the current responsible type:

- If a vendor is currently responsible, you can reassign it to another vendor or a shipping agent.
- If a customer is currently responsible, you can reassign it to another customer or a shipping agent.
- If a shipping agent is currently responsible, you have the flexibility to reassign the responsibility to another shipping agent, or either a customer or vendor.



6. In the **Responsibility Code** field, select the code of the new responsible person.

 Note

This value corresponds to the selection made in the **Responsibility Type** field. For example, if the **Responsibility Type** field is set to *Customer*, the **Responsibility Code** field relates to the customer number.

1. Select **Yes**.

The responsible type and person are successfully updated for the relevant packaging entry.

Furthermore, a negative adjustment entry will be created on the **Packaging Entries** page of the previous responsible person, while a new entry with a positive adjustment will be created on the **Packaging Entries** page of the new responsible person, along with all other relevant information.

 Note

The entries for which the responsible type and person have already been changed cannot be modified again, and the entries that are created with negative adjustments due to the change in responsibility cannot be modified. Also, the entries with document type as *Correction* cannot be changed. However, the entries that are created with a positive adjustment due to the change in responsibility can be modified.



Packaging Specification

Article • 6/13/2024 • 2 min read

The **Packaging Specification** page displays the correlation between the order line containing the trading item and the order line containing the packaging item. This correlation is particularly relevant when using specific EDI message types.

Furthermore, the **Packaging Specification** page also lists the entries for packaging types that are not linked to an item number. To view that,



Select the Search icon  , enter **Packaging Specification**, and then choose the related link.

The **Packaging Specification** page opens.

The **Packaging Specification** page facilitates the observation of the relationship between the trading item and the packaging item by presenting information in the **Document Line No.** and **Source Packaging Line No.** fields.

On this page, you can observe the responsible individual for managing the packaging type. This information is displayed in the **Responsibility Type** and **Responsibility Code** fields for each specific entry. For instance, if the **Responsibility Type** field is designated as *Customer*, then the **Responsibility Code** field will display the customer number.



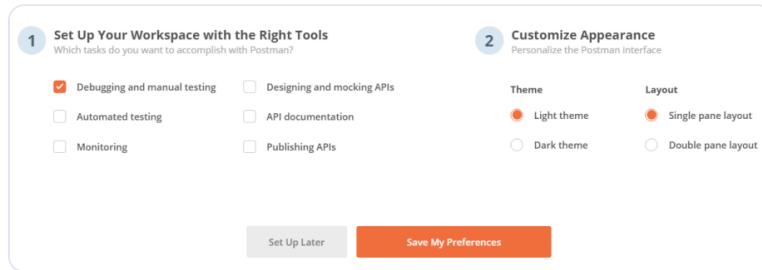
Postman Instructions to test Aptean Food and Beverage APIs

Article • 4/3/2023 • 14 min read

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

Prerequisites

1. The latest version of the Postman app can be downloaded [here](#).
 - a. Postman account (free or Gmail) must be created.
 - b. Set up Workspace for **Debugging and manual testing**.
 - c. Team creation is not mandatory.



2. Get app registration information to be able to authenticate by using **OAuth** against your Business Central Online environment or create one as described in the Microsoft documentation.
 - a. Create an app registration using the instructions [here](#).
 - b. Set up the app registration using the instructions [here](#).
 - c. Start using **OAuth** in Postman API requests using the instructions [here](#).

Important

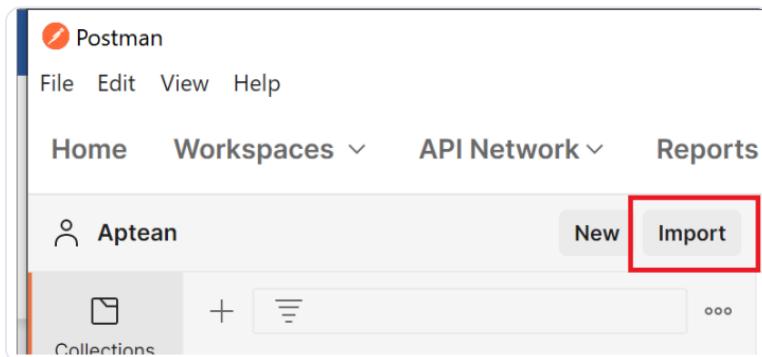
Save the **ClientID**, **TenantID**, and **Secret** for setup of the Postman environment variables as the next steps.



Import and configure Postman Environment

1. Download the latest version of Postman Aptean BC Environment Variables [here](#).

a. Select **Import** and import the **Aptean BC.postman_environment.json** file.



b. Select the **Aptean BC** environment. Click the Environment quick look icon and then click **Edit** to set the current values for variables.

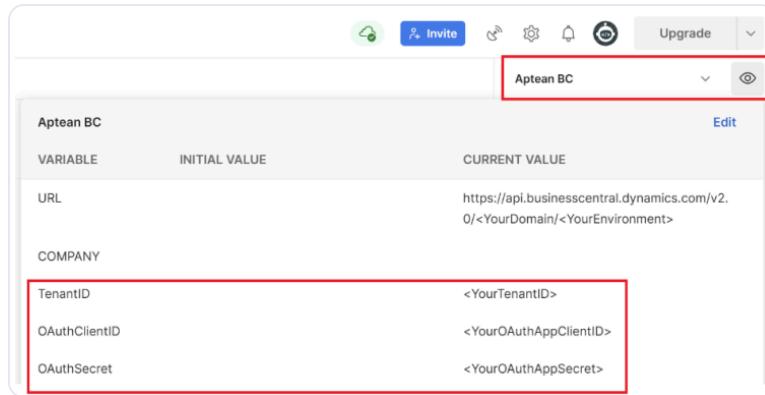
 and then click **Edit** to set the

VARIABLE	INITIAL VALUE	CURRENT VALUE
URL	https://api.businesscentral.dynamics.com/v2.0/<YourDomain/<YourEnvironment>	
COMPANY		
TenantID	<YourTenantID>	
OAuthClientID	<YourOAuthAppClientID>	
OAuthSecret	<YourOAuthAppSecret>	

c. Set your **Domain** or **TenantID** and your **Environment name** to be used as the current value for the URL.

d. To be able to use the **OAuth** Authorization, set the earlier saved **TenantID**, **ClientID**, and **Secret** of the app registration in the Postman Environment variables.





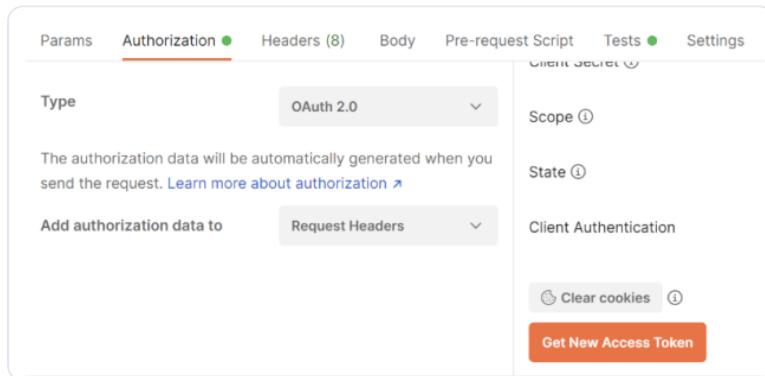
VARIABLE	INITIAL VALUE	CURRENT VALUE
URL		https://api.businesscentral.dynamics.com/v2.0/<YourDomain/<YourEnvironment>
COMPANY		
TenantID		<YourTenantID>
OAuthClientId		<YourOAuthAppClientId>
OAuthSecret		<YourOAuthAppSecret>

Note

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



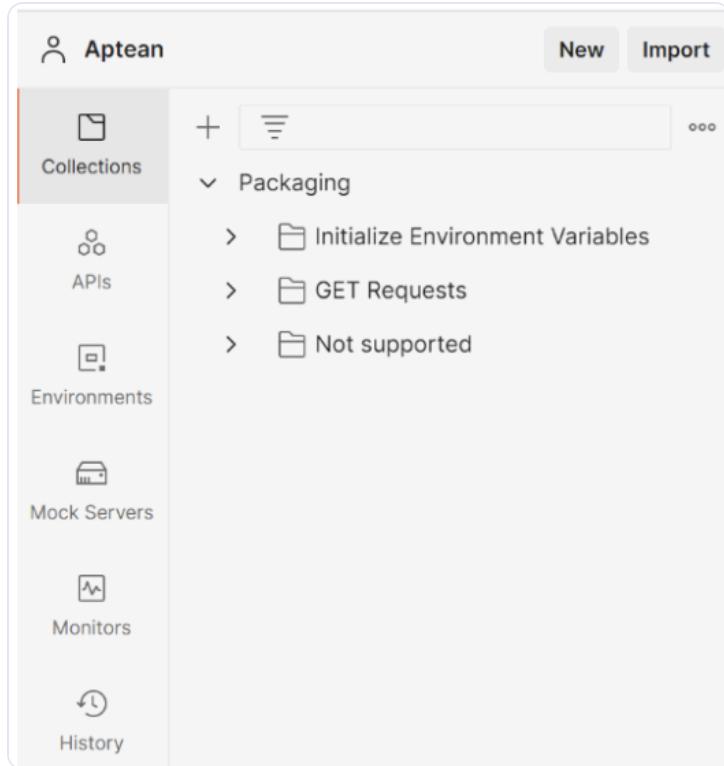
Using the **Get New Access Token** button, the **Bearer Token** should become available to be used in your requests.



Import Postman Requests Collection

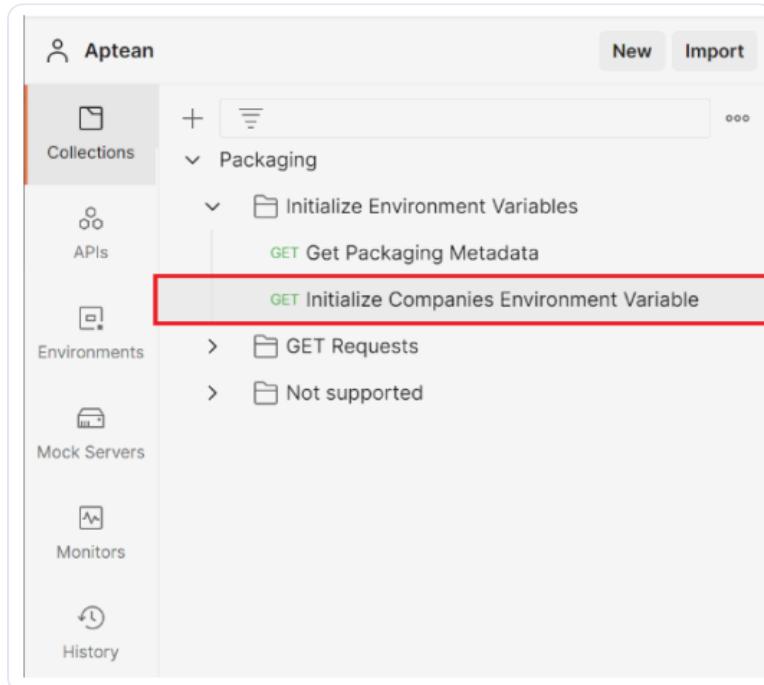
1. Download the latest version of the Postman Aptean Packaging Requests Collection [here](#).
 - a. Import again and import the **Aptean Packaging.postman_collection.json** file. Open **Collections** to find all provided requests.





2. Initialize your environment variables by running the **GET Requests**.

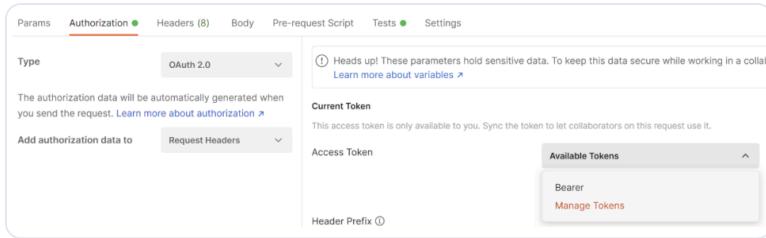
a. Initialize Companies Environment Variables



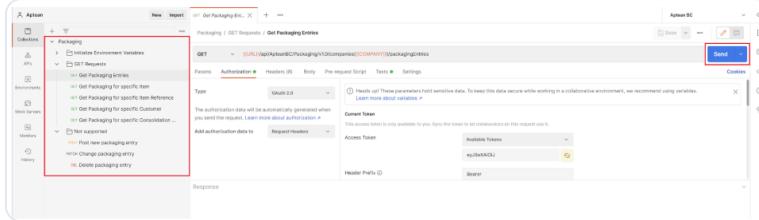
Important

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





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



Synchronizing packaging transactions in drop shipments

Article • 6/4/2025 • 4 min read

Packaging transactions in drop shipment scenarios ensure accurate synchronization of packaging details between sales and purchase orders. The **Related Drop Shipment Doc No.** field on the **Packaging Transaction** page links packaging transactions between two documents.

Packaging synchronization supports various scenarios, including:

- One-to-one relationships: A single sales order is linked to a single purchase order, ensuring seamless synchronization of packaging transactions between two documents.
- One-to-many relationships: A single sales order is linked to multiple purchase orders. In such cases, packaging details must be accurately associated with the correct purchase order.
- Many-to-one relationships: Multiple sales orders are linked to a single purchase order. This ensures that updates to packaging transactions on the purchase order are synchronized with all related sales orders.

The following functionalities are available when synchronizing packaging transactions in drop shipments.

- When the **Calculate Packaging Per** field value is set to *Item* or *Order*, the **Packaging Calculation** field value is set to *On Release* on the **Packaging Setup** page, and the **Drop Shipment** action is executed on a sales order line level:
 - The system creates packaging line items for the corresponding sales lines and updates the same on the corresponding purchase order.
 - The system updates the **Drop Shipment** checkbox and **Purchase Order No.** field value on packaging lines in purchase orders created from sales orders using the **Drop Shipment** action on the **Sales Order** page.

Note

This functionality is bidirectional. It also applies when a sales order is created from a purchase order via the **Drop Shipment** action.

- Packaging line quantities are recalculated based on the following conditions:
 - When the **Allow Recalculate Packaging** toggle on the **Packaging Setup** page is turned on, the system updates quantity on the corresponding packaging lines purchase order or sales order.
 - If sales packaging lines are deleted, the system deletes the corresponding packaging lines from the linked purchase order or sales order.



 Note

If the **Drop Shipment** checkbox is cleared, the sales lines will not flow to the purchase order, and posting the purchase order will not be possible.

- The system ensures that packaging lines are recalculated and remain accurate for drop shipment scenarios only when the **Drop Shipment** checkbox is selected.
 - If the sales order is released or reopened and the **Drop Shipment** checkbox is cleared, the system updates the **Source Type** field value as *Customer* as priority for packaging lines on the **Default Packaging** page and updates the corresponding purchase order.
 - If the sales order is released or reopened and the **Drop Shipment** checkbox is selected, the system updates the **Source Type** field value as blank or *Vendor* for packaging lines on the **Default Packaging** page and updates the corresponding purchase order.

 Note

This functionality is bidirectional. It also applies when a sales order is created from a purchase order via the **Drop Shipment** action.

- You can add new packaging lines to a selected purchase order line by using the **Add Packaging** action on the **Sales Order** page. The newly added packaging lines are automatically reflected in the related purchase order.
- You can add new packaging lines to a selected purchase order line can be created by using the **Add Packaging** action on the **Purchase Order** page. The newly added packaging lines are automatically reflected in the related sales order.

When you select the **Recalculate Packaging** action, the system updates packaging transactions to reflect changes in quantities or document relationships and removes obsolete transactions to maintain data accuracy.

You can select the **Related Drop Shipment Doc No.** field value to navigate directly to the corresponding sales or purchase order, eliminating the need for manual searches.

Error handling and notifications

- If the **Related Drop Shipment Doc No.** field is left blank during manual entry, the system prompts you to provide the required value.

 Note

This error does not occur if the document includes drop and non-drop shipment lines.



- When converting a standard line to a drop shipment, the system replaces existing packaging transactions and notifies you to review and update the transactions.

Posting and synchronization

Packaging transactions are synchronized at key stages:

- Before posting: Ensures sales and purchase orders reflect correct packaging information before posting.
- During manual updates: Any manual changes to packaging details are reflected across related documents.
- During shipment or receipt posting: Updates made to the packaging on the sales documents are synchronized with the purchase documents, and vice versa.



Use the prepayment functionality with packaging processes

Article • 8/27/2025 • 2 min read

You can manage packaging lines more accurately during sales and purchase processes using the prepayment functionality. The available features are:

- The system generates packaging lines for the associated item lines before posting the prepayment invoice when you execute the **Create Packaging Lines** action on the **Sales Order** or **Purchase Order** page.

 Note

The **Create Packaging Lines** action is available only when the **Calculate Packaging Per** field value is set to **On Release** on the **Packaging Setup** page.

- The system displays a confirmation message related to packaging lines when the **Actions > Posting > Prepayment > Post Prepayment Invoice** action is executed for the item line associated with packaging items on the **Sales Order** or **Purchase Order** page. On the confirmation message,
 - If you select **Yes**, the associated packaging lines will be added and posted.
 - If you select **No**, only the existing item line will be posted.

 Note

This feature is available only when the **Prepayment Confirmation** toggle on the **Packaging Setup** page is turned on.

- The system updates the **Quantity** field value for the packaging lines when updating the associated sales line **Quantity** field value.

 Note

The system merges only **order-bound** packaging line items.

- The system displays an error message if there are no sales lines or quantity associated with sales lines on the **Sales Order** or **Purchase Order** page.



Integrations

Article • 9/24/2025 • 1 min read

The Aptean Packaging extension has been integrated with the following extensions:

- [Aptean Advanced Pricing](#)
- [Aptean Integration Platform](#)
- [Aptean Drop Shipment](#)
- [Aptean Over Under Delivery](#)
- [Aptean Grower Return](#)



Aptean Advanced Pricing

Article • 9/24/2025 • 1 min read

When the Aptean Packaging extension is used in conjunction with the Aptean [Advanced Pricing](#) extension, the system sets the **Invoice Hold Status** field value to *Hold – Pricing* for packaging lines with the **Allow Packaging Recalculation** checkbox selected when the associated sales order lines are put on hold on the **Sales Order** page. For more information, see [Place a hold on sales order lines for pricing](#).



Aptean Integration Platform

Article • 3/12/2025 • 1 min read

When the Aptean Packaging extension is used in conjunction with the [Aptean Integration Platform](#) connector, you can generate a payload that includes package details such as mandatory shipping container during AIP events.



Aptean Drop Shipment

Article • 6/4/2025 • 1 min read

When the Aptean Packaging extension is used in conjunction with the Aptean [Drop Shipment](#) extension, the system automatically creates, updates, recalculates, and deletes packaging lines during the drop shipment process. To know more, see [Synchronizing packaging transactions in drop shipments](#).



Aptean Over Under Delivery

Article • 8/27/2025 • 1 min read

When the Aptean Packaging extension is used in conjunction with the Aptean [Over Under Delivery](#) extension, the system recalculates packaging lines and sets the **Outstanding Quantity** field value to *0* when the **Underdelivery** checkbox is selected and posted on the **Sales Order**, **Warehouse Shipment**, **Inventory Pick**, **Inventory Put-away**, and **Warehouse Receipt** pages.

This improves packaging accuracy for both item-bound and order-bound lines, including handling unexpected items on purchase orders. For order-bound packaging lines, the **Underdelivery** checkbox is selected only upon complete shipment. To know more, see [Packaging calculation with over under delivery](#).



Aptean Grower Return

Article • 8/27/2025 • 1 min read

When the Aptean Packaging extension is used in conjunction with the Aptean [Grower Return](#) extension, the system automatically generates lines for packaging items when creating a purchase invoice from the **Settlement** page and posts them when the purchase invoice is posted. For more information, see [Post a settlement](#).

