

User Manual

Aptean Food and Beverage ERP

Buffer Orders

Product Documentation



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Release notes

Article • 2/25/2026 • 1 min read

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

Date	Release version	Description
February 2026	2401.9.0.0	Platform release
July 2025	2401.8.0.0	Stability release
January 2025	2401.7.0.0	Stability release
January 2025	2401.6.0.0	Stability release
January 2025	2401.5.0.0	Stability release
December 2024	2401.4.0.0	Stability release
December 2024	2401.3.0.0	Stability release
November 2024	2401.2.0.0	Stability release
November 2024	2401.1.0.0	Stability release
November 2024	2401.0.0.0	Initial release



2401.9.0.0

Release Note • 2/25/2026 • 1 min read

Enhancements/Modifications

With this release of the Aptean Buffer Order extension, changes have been made to ensure compatibility with Business Central, version 28.

The *CreateSalesOrder156FDW* and *CreateTransferOrder156FDW* codeunits have been updated to use the *InitFromSalesLine* and *InitFromTransLine* procedures from the standard *Sales Line-Reserve* and *Transfer Line-Reserve* codeunits respectively, instead of calling them directly on the *Tracking Specification* record. In BC28, Microsoft relocated these procedures from the *Tracking Specification* table to their respective *Reserve* codeunits. These changes ensure that the create sales order and create transfer order functionality continues to correctly initialize tracking specifications when creating reservation entries for buffer order lines.



2401.8.0.0

Release Note • 7/2/2025 • 1 min read

Enhancements/Modifications

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



2401.7.0.0

Release Note • 1/29/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
252977	The system fails to decrease the value in the Quantity field on the Sales Order or Transfer Order page when the Adjust Qty. On field is set to <i>Free Inventory</i> on the Adjust Quantity per Lot page.



2401.6.0.0

Release Note • 1/17/2025 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Apteian Trading Board extension. For more information, see [What's new in Trading Board, version 2403.2.0.0](#).

Resolved issues

The following issues have been resolved in this release.

ID	Description
250919	The system incorrectly allows changing the Item No. field value on the Lines FastTab of the Buffer Order page when a sales or transfer order is created.
250931	The system fails to create a sales or transfer order when the Create Sales Order and Create Transfer Order actions are selected on the Buffer Order page, respectively.
250922	The system incorrectly allows changing the Location Code field value on the Buffer Order page when lots are assigned to the item tracking lines.
250891	The system fails to remove the link between a sales order and a buffer order when the lots assigned are changed in the Item Tracking Lines page of the sales order.

 **Note**

These issues occur only when the Apteian [Trading Board](#) extension is installed.



2401.5.0.0

Release Note • 1/15/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
250420	The system incorrectly displays an error message when creating a buffer order from the Purchase Order page, if the purchase order lines have packaging items.



2401.4.0.0

Release Note • 12/23/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Buffer Orders extension,

- You can view the **Combine Lots** field on the **Trading Board** page when navigating to it from the buffer order header.

! Note

This field is visible only when the **Advanced View** action is selected and the Aptean [Trading Board](#) extension is installed.

- This extension has been updated to ensure interoperability with the recent changes in the Aptean Trading Board extension. For more information, see [What's new in Trading Board, version 2403.1.0.0](#).

Resolved issues

The following issues have been resolved in this release.

ID	Description
250497	The system incorrectly displays the Combine Lots field when navigating to the Trading Board page from a buffer order line.
250496	The system fails to update the remaining lines in the Quantity and Trading Unit of Measure fields on the Trading Board page if one of the lines is manually updated when navigating from a buffer order line.

! Note

These issues occur when the Aptean [Trading Board](#) extension is installed.



2401.3.0.0

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

Resolved issues

The following issue has been resolved in this release.

ID	Description
250424	An error occurs upon entering a negative value in the Qty. to Adjust field on the Adjust Quantity per Lot page for sales and transfer orders. This issue arises when the Adjust Qty. on field on the Adjust Quantity per Lot page is set to <i>Free Inventory</i> and the associated buffer order is created from a purchase order without receiving lots.



2401.2.0.0

Release Note • 11/28/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
250884	The system fails to remove the Document Line No. field from the Linked Document FactBox on the Trading Board page after executing the Calculate action for the second time. Additionally, the FactBox description incorrectly states, <i>This view is linked with Buffer Line</i> instead of referencing the header. This issue occurs upon executing the Open and Calculate Trading Board action on the Lines FastTab of the Buffer Order page.



2401.1.0.0

Release Note • 11/22/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
250128	An error occurs when installing the Aptean Buffer Orders extension, preventing its installation and usage.



2401.0.0.0

Release Note • 11/20/2024 • 2 min read

Features

With this release of the Aptean Buffer Orders extension, you can:

- Set up number series for buffer orders. For more information, see [Set up buffer orders](#).
- Create buffer orders to reserve item quantities for a customer, customer price group, or location. For more information, see [Create a buffer order](#).
- Manage buffer order status according to your requirements. For more information, see [Manage buffer order status](#).
- Create sales or transfer orders from buffer orders. For more information, see [Create a sales or transfer order from a buffer order](#).
- Create buffer orders directly from purchase orders or purchase order lines. For more information, see [Create a buffer order from a purchase order](#).
- Adjust item quantities from the **Sales Order** page, manage the deletion, and undo shipment of item quantities for a sales order created from a buffer order. For more information, see [Manage sales orders](#).
- Adjust item quantities from the **Transfer Order** page, manage the deletion, and undo shipment of item quantities for a transfer order created from a buffer order. For more information, see [Manage transfer orders](#).

Integrations

The Aptean Buffer Orders extension has been integrated with the following extensions:

- Aptean [Advanced Attributes](#)
- Aptean [Lot Management](#)
- Aptean [Trading Board](#)

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



Introduction

Article • 11/20/2024 • 1 min read

The Aptean Buffer Orders (BUF) extension helps you manage inventory effectively. You can create buffer orders to set aside item quantities for specific purposes. For example, you can buffer inventory in advance for a customer or customer group and then create a sales order from the buffer order when needed. Additionally, you can buffer inventory for a location and create a transfer order from the buffer order to move the inventory.

The key benefits of using the Aptean Buffer Orders extension are:

- Flexible reservations: Buffer item quantities and adjust them dynamically based on changing business needs.
- Order fulfillment: Use the buffered inventory for upcoming transactions, ensuring timely deliveries and reducing risks of stock shortages.
- Increased efficiency: Create sales or transfer orders directly from buffer orders. Additionally, you can create buffer orders from purchase orders, simplifying your workflow.



Setup

Article • 11/20/2024 • 1 min read

The following setups are required.

- [Manage permission sets](#)
- [Set up buffer orders](#)



Manage permission sets

Article • 2/20/2025 • 3 min read

Permission sets in Business Central define a user's access level to various features and data within the system.

Business Central offers two types of 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 *BUFFERORDER156FDW*.

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 *BUFORDERBASIC156FDW*.

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.



Buffer Orders

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



Set up buffer orders

Article • 11/20/2024 • 2 min read

You must define the number series for buffer orders, so the system can assign numbers based on the number series when creating them.

The following procedure outlines how to set up number series for buffer orders.

1. Select the Search icon  , enter **Buffer Order Setup**, and then choose the related link.
The **Buffer Order Setup** page opens.
2. On the **General** FastTab, in the **Buffer Order Nos.** field, select the number series code for buffer orders.
The number series is set up.



Manage buffer orders

Article • 11/20/2024 • 1 min read

You can view buffer orders and create a buffer order from the **Buffer Orders** page. Further, you can open a buffer order, add buffer order lines, and create a sales or a transfer order for the inventory when required.

See also

- [Create a buffer order](#)
- [Manage buffer order stauts](#)
- [View buffer order details on the FactBox](#)
- [Create a sales or transfer order from a buffer order](#)



Create a buffer order

Article • 11/20/2024 • 2 min read

The following procedure outlines how to create a buffer order.

- 1. Select the Search icon , enter **Buffer Orders**, and then choose the related link.
The **Buffer Orders** list page opens.
- 2. On the action bar, select **New**.
The **Buffer Order** card page opens.
- 3. On the **General** FastTab, enter the required information in the following fields:

Field	Description
No.	Specifies the buffer order number. This value is automatically generated based on the number series set up on the Buffer Order Setup page. For more information, see Set up buffer orders . You can manually change it as required.
Document Date	Enter or select the buffer order creation date. The system displays the current work date by default, but you can manually change it if required.
Reservation Date	Specifies the date for reserving the items in this buffer order. The system displays the current work date by default, but you can manually change it as required.
Assigned User ID	Select the user ID of the person who is responsible for the buffer order.
Status	Select the status of the buffer order. The field value is <i>Draft</i> by default. The available options are: <i>Draft</i> , <i>Active</i> , or <i>Closed</i> . For more information, see Manage buffer order status .

- 4. Select a value from one of the following fields based on the purpose of creating this buffer order.

Field	Description
Customer Price Group Code	Select the customer price group for whom you want to create the buffer order. The system uses this value when creating a sales order.
Customer No.	Select the customer for whom you want to create the buffer order. The system uses this value when creating a sales order.
Transfer-from Code	Select the location from which you want to transfer items. The system uses this value when creating a transfer order.



 Note

You cannot edit this selection after assigning a lot on the item tracking line for a buffer order line.

5. Enter the required information in the following fields:

Field	Description
Customer Name	Specifies the name of the customer selected. This field value is visible only when the Customer No. field value is selected.
Ship-to Code	Select the ship-to address associated with the selected customer. This field is editable only when the Customer No. field value is selected.
Transfer-from Name	Specifies the name of the selected location. This field value is visible only when the Transfer-from Code field value is selected.

6. On the **Lines** FastTab, you can add buffer order lines. Enter the required information in the following fields:

Field	Description
Item No.	Select the item for which you want to reserve the item quantity.
Item Description	Specifies the description of the selected item.
Global Lot Attributes	Specifies the global lot attributes (one to eight) requirement of this item as defined on the Advanced Attribute Setup page. You cannot edit the global lot attributes assigned at the item level. You can add global lot attributes that are not defined at the item level and edit them at the buffer order level. You cannot edit these fields after assigning a lot on the item tracking line. This field is available only when the Aptean Advanced Attributes extension is installed.
Location Code	Specifies the location to use when creating a sales or transfer order. If you have selected a value in the Customer Price Group Code or the Customer No. field on the General FastTab, you must select the location. If you have selected a value in the Transfer from field, the system displays the specified location.
Qty. Reserved	Enter the quantity of the item that you want to reserve. For sales orders, you cannot reduce this quantity to less than the sum of the Qty. on Sales Order (Base) and Qty. Shipped (Base) field values. For transfer orders, you cannot reduce this quantity to less than the sum of the Qty. on Transfer Order (Base) and Qty. Transferred (Base) field values.



	If you want to adjust the reserved quantity after assigning a lot on the item tracking line, ensure you change the Quantity (Base) field value on the Item Tracking Lines page first and then change the Qty. Reserved field value on the BufferOrder page.
Qty. Reserved (Base)	Specifies the reserved quantity expressed in the item's base unit of measure.
Unit of Measure	Specifies the unit of measure associated with the item. The field value is the item's sales unit of measure or base unit of measure by default, but you can manually change this value as required. You cannot change this value if the buffer order was created from a purchase order.
Qty. to Assign	Enter the quantity you want to assign to the sales or transfer order. This value cannot exceed the Qty. Reserved field value.
Reservation Date	Specifies the reservation date for the item. The field displays the date selected in the Reservation Date field value on the General FastTab, but you can manually change it as required.
Assigned Lots	Specifies the lots assigned to the item. You can select the field value to view the information of the lots. This field is visible only when the Aptean Lot Management extension is installed.
Outstanding Qty.	Specifies the remaining quantity of the item in the buffer order line.
Qty. on Sales Order (Base)	Specifies the item quantity in sales orders created from this buffer order. Select the value to view the relevant reservation entries.
Qty. on Transfer Order (Base)	Specifies the item quantity in transfer orders created from this buffer order. Select the value to view the relevant reservation entries.
Qty. Shipped (Base)	Specifies the item quantity shipped from the linked sales order defined in the base unit of measure. Select the value to view the relevant item ledger entries. If the Aptean Over Under Delivery extension is installed and additional quantities are shipped as an overdelivery via a sales order created from a buffer order, the system updates the Qty. Shipped (Base) field value with the additional quantity shipped.
Qty. Transferred (Base)	Specifies the quantity transferred from linked transfer orders defined in the base unit of measure. Select the value to view the relevant item ledger entries.
Purchase Order No.	Specifies the purchase order from which this buffer order was created. This field is visible only when the buffer order is created from a purchase order and visible only when personalized.



7. On the **Lines** FastTab, select the **Item Tracking Lines** action to view and assign a lot for the selected item quantities.

If you have specified global lot attributes, the system displays lots that meet the global lot attribute requirements.

Note

You cannot delete a buffer order or a buffer order line if some quantity is assigned to sales or transfer order (if the **Qty. on Sales Order (Base)** or **Qty. to Transfer Order (Base)** field value exists).



Manage buffer order status

Article • 11/20/2024 • 1 min read

You can manage the buffer order status with the **Status** field value on the **General** FastTab of the **Buffer Order** page.

When you create a buffer order, the **Status** field is set to *Draft* by default. You can change the buffer order status as required. The available options are:

- *Draft*: You can update the necessary details for the buffer order in this status.
- *Active*: You can change the status to *Active* after updating the mandatory details. You can create sales or transfer orders only with this status.
- *Closed*: After assigning the item quantities, you can close the buffer order. Any outstanding item quantities will no longer be buffered and will be released into the inventory, and the lots are unassigned.

Note

You can change the status of a buffer order to *Draft* to reopen it. In this case, the item quantities will contain blank values.



View buffer order details on the FactBox

Article • 11/20/2024 • 2 min read

You can view the following information on the **Buffer Order Details** section of the FactBox of the **Buffer Orders** page.

Field	Description
Sales Orders	Specifies the number of sales orders linked to this buffer order. Select the value to view the relevant reservation entries.
Transfer Orders	Specifies the number of transfer orders linked to this buffer order. Select the value to view the relevant reservation entries.
Posted Sales Shipments	Specifies the number of posted sales shipments linked to this buffer order. Select the value to view the relevant item ledger entries.
Posted Transfer Documents	Specifies the number of posted transfer documents linked to this buffer order. Select the value to view the relevant item ledger entries.

You can view the following information on the **Buffer Order Line Details** section of the FactBox of the **Buffer Order** page.

Field	Description
Sales Orders	Specifies the number of sales orders linked to the selected buffer order line. Select the value to view the relevant reservation entries.
Transfer Orders	Specifies the number of transfer orders linked to the selected buffer order line. Select the value to view the relevant reservation entries.
Posted Sales Shipments	Specifies the number of posted sales shipments linked to the selected buffer order line. Select the value to view the relevant item ledger entries.
Posted Transfer Documents	Specifies the number of posted transfer documents linked to the selected buffer order line. Select the value to view the relevant item ledger entries.
Lot Attribute Requirements	You can view the lot attributes assigned to the item. You can also add and edit lot attributes at the buffer order level. You cannot edit these fields after assigning a lot on the item tracking line. These fields are visible only when the Aptean Advanced Attributes extension is installed.



Create a sales or transfer order from a buffer order

Article • 11/20/2024 • 2 min read

You can create a sales or transfer order from a buffer order. Ensure the **Qty. to Assign** field value is entered and the lots are assigned for the item quantity.

! Note

- If you do not have enough inventory to meet the demand for the items, the system displays a confirmation message to notify you about it on the **Item Tracking Lines** page of the buffer order.
- You can create a sales or transfer order from a buffer order without receiving the inventory of item quantities.

The following procedure outlines how to create a sales order from a buffer order when you have selected the **Customer No.** field value on the **General** FastTab of the **Buffer Order** page.

1. On the action bar, select **Create Sales Order**.
The system creates a sales order for the selected customer and the item quantities specified in the buffer order lines and displays a confirmation message.
2. Select **Yes** to open the sales order.
The **Sales Order** page opens.

The following procedure outlines how to create a sales order from a buffer order when you have selected the **Customer Price Group Code** field value on the **General** FastTab of the **Buffer Order** page.

3. On the action bar, select **Create Sales Order**.
The **Customers** dialog opens with a list of all the customers in the selected customer price group.
4. Select the required customer and then select **OK**.
The system creates a sales order for the selected customer and the item quantities specified in the buffer order lines and displays a confirmation message.
5. Select **Yes** to open the sales order.
The **Sales Order** page opens.

The following procedure outlines how to create a transfer order from the **Buffer Order** page.

6. On the action bar, select **Create Transfer Order**.
The **Select Transfer Order Location** dialog opens.
7. Enter the required information in the following fields:

Field	Description
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Transfer-from Code	Specifies the location from which the items are transferred from. This field inherits the Transfer-from Code field value set up on the General FastTab of the Buffer Order page.
Transfer-to Code	Select the location to which you want to transfer the items to. If you have turned on the Direct Transfer toggle, you must select a direct location value.
In-Transit Code	Select the in-transit location for the transfer order, such as a shipping agent. This field is not editable if you have turned on the Direct Transfer toggle.
Direct Transfer	Turn on the toggle if you want the transfer order to use a direct location instead of an in-transit location. This field is not editable if you have selected a value in the In-Transit Code field.

8. Select **OK**.

The system creates a transfer order for the selected location and the item quantities specified in the buffer order lines and displays a confirmation message.

9. Select **Yes** to open the transfer order.

The **Transfer Order** page opens.



Create a buffer order from a purchase order

Article • 11/20/2024 • 2 min read

You can buffer inventory directly from a purchase order for potential sales or transfer orders. The lot information assigned to the purchase order lines is applied to the buffer order lines. You create buffer orders from purchase orders or specific purchase order lines.

The following procedure outlines how to create a buffer order from a purchase order.

- 1. Open the relevant **Purchase Order** page.

! Note

Ensure all item quantities on the purchase order lines are assigned to a lot on the **Item Tracking Lines** page.

- 2. On the action bar, select **Actions > Functions > Create Buffer Order**.
The **Create Buffer Order** dialog opens.
If a buffer order has already been created from the purchase order, the system displays a confirmation message to notify you about it.
- 3. Select a value from one of the following fields based on the purpose of creating this buffer order.

Field	Description
Customer Price Group Code	Select the customer price group for whom you want to create the buffer order. The system uses this value when creating a sales order.
Customer No.	Select the customer for whom you want to create the buffer order. The system uses this value when creating a sales order.
Transfer-from Code	Select the location from which you want to transfer items. The system uses this value when creating a transfer order. This field is visible only if there is one purchase order line on the purchase order or if all the purchase order lines are associated with the same location. The system inherits the field value from the purchase order line(s), but you can override it, if required.

- 4. Select **OK**.
The system creates the buffer order and displays a confirmation message.
- 5. Select **Yes** to open the buffer order.
The **Buffer Order** page opens. For more information, see [Manage buffer orders](#).



The following procedure outlines how to create a buffer order from purchase order lines.

6. Open the relevant **Purchase Order** page.
7. On the **Lines** FastTab, select the required purchase order lines for which you want to create the buffer order.

Note

Ensure all item quantities on the purchase order lines are assigned to a lot on the **Item Tracking Lines** page.

8. On the action bar, select **Functions > Create Buffer Order**.

The **Create Buffer Order** page opens.

If a buffer order is already created for the purchase order lines, the system displays a confirmation message to notify you about the same.

9. Select a value from one of the following fields based on the purpose of creating this buffer order.

Field	Description
Customer Price Group Code	Select the customer price group for whom you want to create the buffer order. The system uses this value when creating a sales order.
Customer No.	Select the customer for whom you want to create the buffer order. The system uses this value when creating a sales order.
Transfer-from Code	Select the location from which you want to transfer items. The system uses this value when creating a transfer order. This field is visible only if there is one purchase order line on the purchase order or if all the purchase order lines are associated with the same location. The system inherits the field value from the purchase order line(s), but you can override it if required.

10. Select **OK**.

The system creates the buffer order and displays a confirmation message.

11. Select **Yes** to open the buffer order.

The **Buffer Order** page opens. For more information, see [Manage buffer orders](#).

Note

If the Aptean [License Plating](#) extension is installed, and a purchase order line contains a license plate tracked item and location, the system uses the license plate number selected in the **License Plate No. Non-License Plate Tracked Location** field (for example, *COMMONLP*) on the **General** FastTab of the **License Plating Setup** page, when creating a buffer order.



Manage the trading board

Article • 11/20/2024 • 1 min read

If the Aptean [Trading Board](#) extension is installed, you can perform the following:

See also

- [Create a buffer order from the trading board](#)
- [Link the trading board to a buffer order](#)
- [Assign item quantities to a buffer order](#)
- [Open and calculate the trading board from the buffer order header](#)
- [Open and calculate the trading board from buffer order lines](#)



Create a buffer order from the trading board

Article • 11/20/2024 • 1 min read

You can create a buffer order that is linked to the trading board directly from the trading board.

The following procedure outlines how to create a buffer order from the trading board.

1. On the **Trading Board** page, on the action bar, select **New Document > Buffer Order**.
The **New Buffer Order** page opens.
2. On the **General** FastTab, select a value from one of the following fields based on the purpose of creating this buffer order.

Field	Description
Customer Price Group Code	Select the customer price group for whom you want to create the buffer order. The system uses this value when creating a sales order.
Customer No.	Select the customer for whom you want to create the buffer order. The system uses this value when creating a sales order.
Transfer-from Code	Select the location from which you want to transfer items. The system uses this value when creating a transfer order.

3. Enter the required information in the following fields:

Field	Description
Assigned User ID	Select the user who is responsible for this buffer order.
Customer Name	Specifies the name of the customer selected. This field value is visible only when the Customer No. field value is selected.
Ship-to Code	Select the ship-to address associated with the selected customer. This field is editable only when the Customer No. field value is selected.
Transfer-from Name	Specifies the name of the selected location. This field value is visible only when the Transfer-from Code field value is selected.
Status	Specifies the status of the buffer order. The available options are: <i>Draft</i> , <i>Active</i> , or <i>Closed</i> . The system displays <i>Draft</i> by default.

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



Field	Description
Document Date	Select the buffer order creation date. The system displays the current work date by default.
Reservation Date	Select the date for reserving the items in this buffer order. The system displays the current work date by default.

5. Select **OK**.

The buffer order is created and linked to the trading board. For more information, see [Manage buffer orders](#).



Link the trading board to a buffer order

Article • 11/20/2024 • 1 min read

You can link the trading board to an already existing buffer order.

The following procedure outlines how to link the trading board to a buffer order.

1. On the action bar, select **Select Document** > **Buffer Order**.

The **Buffer Orders** page opens.

2. Select the buffer order you want to link the trading board to and then select **OK**.

The buffer order is linked and the **Linked Document** section of the FactBox on the **Trading Board** page displays information about the linked buffer order.

3. In the **Qty. on Buffer Order (Base)** field on the **Entries** FastTab of the **Trading Board** page, you can view how many units of item in a lot are allocated on the tracking lines of the linked buffer order for the specified location in the base unit of measure of the item.

Note

You can view this field only when the **Advanced View** action is selected.



Assign item quantities to a buffer order

Article • 11/20/2024 • 1 min read

After linking a buffer order to the trading board, you can enter the **Quantity** and **Unit Price** field values and assign the item quantities and unit price entered to the lines of the respective linked buffer order, along with the allocated lots.

Select any of the following actions on the **Trading Board** page.

Action	Description
Assign	Assign the quantities entered on the trading board entries to the lines of the linked buffer order.
Assign & Close	Assign the quantities entered on the trading board entries to the lines of the linked buffer order and close the trading board.

ⓘ Note

- You can assign quantities for items that are blocked.
- When you assign item quantities, the quantities available in the associated lot are reduced.



Open and calculate the trading board from the buffer order header

Article • 11/20/2024 • 1 min read

You can access the trading board from the buffer order header to view the availability of items based on the values specified and assign quantities to the buffer order.

The following procedure outlines how to open and calculate the trading board from a buffer order.

1. Open the relevant **Buffer Order** page.
2. On the action bar, select **Actions > Open and Calculate Trading Board**.
This action is available only when the **Status** field is set to *Draft*.
The **Trading Board Filter** page opens.
3. You can edit the filters as required and then select **OK**.
The trading board entries are displayed on the **Entries** FastTab of the **Trading Board** page.
4. You can enter the item quantity in the **Quantity** field and select the **Assign** or **Assign and Close** action to assign the quantities to the linked buffer order.
The item quantities are updated and buffered on the linked buffer order.



Open and calculate the trading board from buffer order lines

Article • 11/20/2024 • 2 min read

You can access the trading board from a buffer order line to see the availability of a specific item based on the location and global lot attributes specified.

Ensure that the **Item No.** field value of the buffer order line is selected, and the **Status** field on the buffer order header is set to *Draft*.

The following procedure outlines how to open and calculate the trading board from an assembly order line.

1. Open the relevant **Buffer Order** page.
2. On the **Lines** FastTab, select the buffer order line, and then select the **Open and Calculate Trading Board** action. The **Trading Board** page opens, and the system calculates the availability of the item based on the values in the buffer order line.
3. On the **Entries** FastTab, in the **Quantity** field, enter the number of items to buffer. This value cannot exceed the **Available Quantity (Base)** field value.
4. Select the **Assign** or **Assign and Close** action to assign the quantities to the linked buffer order line. The item quantities are updated and buffered on the linked buffer order line. If multiple lot numbers are selected, all the quantities will be added to the same buffer order line.

Note

You can also use the **Calculate** action on the **Trading Board** page again. In that case, the buffer order number is kept as the linked document, but the link with the line number is lost.



Manage sales orders

Article • 11/20/2024 • 1 min read

For sales orders created from buffer orders, you can perform the following:

- [Adjust item quantities](#)
- [Manage deletion](#)
- [Undo shipment of item quantities](#)



Adjust item quantities

Article • 11/20/2024 • 2 min read

You can assign item quantities to a sales order from the related buffer order or unassign item quantities on a sales order back to the related buffer order directly from the **Sales Order** page. Additionally, you can buffer more item quantities from the inventory or release buffered item quantities to the inventory directly from the **Sales Order** page. The changes in item quantities are adjusted in the sales order and the related buffer order accordingly.

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Note

You cannot adjust item quantities if the related buffer order's **Status** field value is set to *Closed*.

The following procedure outlines how to adjust item quantities.

1. Open the relevant **Sales Order** page.
2. Select a sales order line and then select **Functions > Adjust Quantity**.
The **Adjust Quantity per Lot** page opens.
3. Enter the required information in the following fields:

Field	Description
Lot No.	Specifies the lot number to which the item quantities are assigned.
Outstanding Quantity	Specifies the remaining quantity of the item in the buffer order line.
Total Available Qty.	Specifies the total available quantity of the item in the specified lot. This field is visible only when personalized.
Qty. Reserved on Buffer Order	Specifies the quantity currently reserved on the related buffer order. This field is visible only when personalized.
Rem. Qty. on Buffer Order	Specifies the remaining buffered quantity on the buffer order. This field is visible only when personalized.
Adjust Qty. on	Select from where you want to adjust the item quantities. The available options are: • <i>Buffer Order</i>: You can assign item quantities to a sales order from the related buffer order or unassign item quantities on a sales order back to the related buffer order. • <i>Free Inventory</i>: You can buffer more item quantities from the inventory or release buffered item quantities to the inventory.



Qty. to Adjust	Enter the item quantities you want to increase or decrease according to your selection in the Adjust Qty. on field. You can enter a positive value to increase item quantities or a negative value to decrease item quantities. If you have selected <i>Buffer Order</i> on the Adjust Qty. on field, this value cannot exceed the Rem. Qty. on Buffer Order field value. If you have selected <i>Free Inventory</i> on the Adjust Qty. on field, this value cannot exceed the Total Available Qty. field value.
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4. Select **Close**.

The system displays a confirmation message.

5. Select **Yes**.

If you have selected *Buffer Order* in the **Adjust Qty. on** field, the **Quantity** field value on the sales order line is updated. The **Outstanding Qty.** and **Qty. on Sales Order (Base)** field values are updated on the related buffer order. Additionally, the item tracking lines are updated accordingly.

If you have selected *Free Inventory* on the **Adjust Qty. on** field, the **Quantity** field value on the sales order line is updated. The **Qty. Reserved** and **Qty. on Sales Order (Base)** field values are updated on the related buffer order. Additionally, the item tracking lines are updated accordingly.

 Note

You can follow the above procedure to adjust item quantities to and from free inventory for sales orders unrelated to a buffer order.



Manage deletion

Article • 11/20/2024 • 1 min read

If you attempt to delete a sales order, sales order lines, or item tracking lines, the system displays a confirmation message notifying you that it was created from a buffer order. Based on the status of the related buffer order, the system performs one of the following actions:

- If the status of the buffer order is *Active*, the item quantities are reassigned to the buffer order. The system updates the **Qty. on Sales Order (Base)** and **Outstanding Qty.** field values on the **Buffer Order** page.
- If the status of the buffer order is *Closed*, you cannot delete the sales order, sales order lines, or item tracking lines.



Undo shipment of item quantities

Article • 11/20/2024 • 1 min read

If you undo the shipment of item quantities for a sales order created from a buffer order, the relevant item quantities are reassigned to the buffer order. The system updates the **Qty. Shipped (Base)** and **Qty. on Sales Order (Base)** field values on the **Buffer Order** page.



Manage transfer orders

Article • 11/20/2024 • 1 min read

For transfer orders created from buffer orders, you can perform the following:

- [Adjust item quantities](#)
- [Manage deletion](#)
- [Undo shipment of item quantities](#)



Adjust item quantities

Article • 11/20/2024 • 2 min read

You can assign item quantities to a transfer order from the related buffer order or unassign item quantities on a transfer order back to the related buffer order directly from the **Transfer Order** page. Additionally, you can buffer more item quantities from the inventory or release buffered item quantities to the inventory directly from the **Transfer Order** page. The changes in item quantities are adjusted in the transfer order and the related buffer order accordingly.

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Note

You cannot adjust item quantities if the related buffer order's **Status** field value is set to *Closed*.

The following procedure outlines how to adjust item quantities.

1. Open the relevant **Transfer Order** page.
2. Select a transfer order line and then select **Functions > Adjust Quantity**.
The **Adjust Quantity per Lot** page opens.
3. Enter the required information in the following fields:

Field	Description
Lot No.	Specifies the lot number to which the item quantities are assigned.
Outstanding Quantity	Specifies the remaining quantity of the item in the buffer order line.
Total Available Qty.	Specifies the total available quantity of the item in the specified lot. This field is visible only when personalized.
Qty. Reserved on Buffer Order	Specifies the quantity currently reserved on the related buffer order. This field is visible only when personalized.
Rem. Qty. on Buffer Order	Specifies the remaining buffered quantity on the buffer order. This field is visible only when personalized.



Adjust Qty. on	Select from where you want to adjust the item quantities. The available options are: • <i>Buffer Order</i>: You can assign item quantities to a transfer order from the related buffer order or unassign item quantities on a transfer order back to the related buffer order. • <i>Free Inventory</i>: You can buffer more item quantities from the inventory or release buffered item quantities to the inventory.
Qty. to Adjust	Enter the item quantities you want to increase or decrease according to your selection in the Adjust Qty. on field. You can enter a positive value to increase item quantities or a negative value to decrease item quantities. If you have selected <i>Buffer Order</i> on the Adjust Qty. on field, this value cannot exceed the Rem. Qty. on Buffer Order field value. If you have selected <i>Free Inventory</i> on the Adjust Qty. on field, this value cannot exceed the Total Available Qty. field value.

4. Select **Close**.

The system displays a confirmation message.

5. Select **Yes**.

If you have selected *Buffer Order* in the **Adjust Qty. on** field, the **Quantity** field value on the transfer order line is updated. The **Outstanding Qty.** and **Qty. on transfer Order (Base)** field values are updated on the related buffer order. Additionally, the item tracking lines are updated accordingly.

If you have selected *Free Inventory* on the **Adjust Qty. on** field, the **Quantity** field value on the transfer order line is updated. The **Qty. Reserved** and **Qty. on Transfer Order (Base)** field values are updated on the related buffer order. Additionally, the item tracking lines are updated accordingly.

Note

You can follow the above procedure to adjust item quantities to and from free inventory for transfer orders unrelated to a buffer order.



Manage deletion

Article • 11/20/2024 • 1 min read

If you attempt to delete a transfer order, transfer order lines, or item tracking lines, the system displays a confirmation message notifying you that it was created from a buffer order. Based on the status of the related buffer order, the system performs one of the following actions:

- If the status of the buffer order is *Active*, the item quantities are reassigned to the buffer order. The system updates the **Qty. on Transfer Order (Base)** and **Outstanding Qty.** field values on the **Buffer Order** page.
- If the status of the buffer order is *Closed*, you cannot delete the transfer order, transfer order lines, or item tracking lines.



Undo shipment of item quantities

Article • 11/20/2024 • 1 min read

If you undo the shipment of item quantities for a sales order created from a buffer order, the relevant item quantities are reassigned to the buffer order. The system updates the **Qty. Transferred (Base)** and **Qty. on Transfer Order (Base)** field values on the **Buffer Order** page.



Integrations

Article • 11/20/2024 • 1 min read

Changes are made to the Aptean Buffer Orders extension to support the following extensions:

- [Aptean Advanced Attributes](#)
- [Aptean Lot Management](#)
- [Aptean Trading Board](#)



Aptean Advanced Attributes

Article • 11/20/2024 • 1 min read

When the Aptean Buffer Orders extension is used in conjunction with the Aptean [Advanced Attributes](#) extension, you can view global lot attributes assigned at an item level on the **Buffer Order** page. You can also add and edit lot attributes at the buffer order level. For more information, see [Create a buffer order](#).

Additionally, you can view lot attributes assigned at an item level and add and edit lot attributes at the buffer order level on the FactBox of the **Buffer Order** page. For more information, see [View details on the FactBox](#).



Aptean Lot Management

Article • 11/20/2024 • 1 min read

When the Aptean Buffer Orders extension is used in conjunction with the Aptean [Lot Management](#), you can view the lots assigned to the item in the **Assigned Lots** field on the buffer order line of the **Buffer Order** page. For more information, see [Create a buffer order](#).



Aptean Trading Board

Article • 11/20/2024 • 1 min read

When the Aptean Buffer Orders extension is used in conjunction with the Aptean [Trading Board](#) extension, you can create a buffer order from the trading board, link the trading board to a buffer order, assign item quantities to a buffer order from the trading board, and open and calculate the trading board from the buffer order header or lines. For more information, see [Manage the trading board](#).

