

# User Manual

# Aptean Food and

# Beverage ERP

## Trading Board

Product Documentation



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## Trading Board

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# Release notes

Article • 10/22/2025 • 1 min read

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

Date	Release version	Description
October 2025	<a href="#">2503.0.0</a>	Feature release
August 2025	<a href="#">2502.1.0</a>	Stability release
July 2025	<a href="#">2502.0.0</a>	Feature release
May 2025	<a href="#">2501.2.0</a>	Stability release
February 2025	<a href="#">2501.1.0</a>	Platform release
January 2025	<a href="#">2501.0.0</a>	Feature release
January 2025	<a href="#">2403.4.0</a>	Stability release
January 2025	<a href="#">2403.3.0</a>	Stability release
January 2025	<a href="#">2403.2.0</a>	Stability release
December 2024	<a href="#">2403.1.0</a>	Stability release
December 2024	<a href="#">2403.0.0</a>	Feature release
November 2024	<a href="#">2402.1.0</a>	Stability release
November 2024	<a href="#">2402.0.0</a>	Feature release
September 2024	<a href="#">2401.0.0</a>	Feature release
May 2024	<a href="#">2301.8.0</a>	Stability release
May 2024	<a href="#">2301.7.0</a>	Stability release
April 2024	<a href="#">2301.6.0</a>	Stability release
January 2024	<a href="#">2301.5.0</a>	Stability release
January 2024	<a href="#">2301.4.0</a>	Stability release
January 2024	<a href="#">2301.3.0</a>	Stability release



December 2023	<a href="#"><u>2301.2.0.0</u></a>	Stability release
November 2023	<a href="#"><u>2301.1.0.0</u></a>	Stability release
July 2023	<a href="#"><u>2.2.110139.0</u></a>	Stability release
July 2023	<a href="#"><u>2.1.108435.0</u></a>	Stability release
March 2023	<a href="#"><u>2.0.82398.0</u></a>	Feature release
November 2022	<a href="#"><u>1.0.66835.0</u></a>	Feature release



# 2503.0.0.0

Release Note • 10/22/2025 • 2 min read

## Features

With the features added in this release of the Aptean Trading Board extension,

- The system identifies conflicts between the supply and demand of items based on quantity and availability date parameters. This improves visibility and prevents inventory allocation mismatches. For more information, see [Manage demand lines](#).
- The dependency on the Aptean [Fresh Bridge](#) and Aptean [Foundation Layer Fresh](#) extensions has been removed. This update allows you to install the Aptean Trading Board extension without requiring other Aptean Fresh extensions. Additionally, all relevant fields from the Aptean Fresh extensions have been transferred to the Aptean Trading Board extension.

To ensure that existing field customizations remain unaffected, you can manually apply this change by turning on the **Remove Fresh Dependency Feature** toggle on the **Trading Board Setup** page to remove the dependencies immediately, or the system will automatically apply this change when updating to Business Central, version 29.

## UI/UX changes

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

- The **Demand Lines** FastTab has been added to the **Trading Board** page.
- The **Calculation Type** field has been added to the **Trading Board Setup** and the **Trading Board Filters** pages.
- The **Conflict** field has been added to the **Entries** FastTab on the **Trading Board** page.
- The **Remove Fresh Dependency Feature** toggle has been added to the **Trading Board Setup** page.



# 2502.1.0.0

Release Note • 8/27/2025 • 1 min read

## Enhancements/Modifications

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



# 2502.0.0.0

Release Note • 7/2/2025 • 1 min read

## Features

With the features added in this release of the Aptean Trading Board extension, you can:

- Create and manage a push list of items, lots, or locations that are prioritized for sale. For more information, see [Manage the push list](#).
- Use the trading board to view items available from the push list and add them to sales orders directly. For more information, see [Open and calculate the trading board from sales order lines](#).
- View and manage items on the push list from the trading board. For more information, see [Manage the push list from the trading board](#).

## UI/UX changes

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

- The **Push List** page has been added.
- The following actions have been added to the **Trading Board** page.
  - Add to Push List
  - Open the Push List
- The **Push List Code** field has been added to the **Push List** FastTab of the **Trading Board Filter** page and the **Filters** FastTab of the **Trading Board** page.



# 2501.2.0.0

Release Note • 5/7/2025 • 1 min read

## Enhancements/Modifications

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

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

## Resolved issues

The following issue has been resolved in this release.

ID	Description
292113	An error occurs when attempting to open the sales order from the <b>Sales Orders</b> list page.



# 2501.1.0.0

Release Note • 2/4/2025 • 1 min read

## Enhancements/Modifications

With this release of the Aptean Trading Board extension, the *AssignLotByFIFO67FDW* codeunit has been made obsolete, and all the events have been migrated to the newly added *AssignByFIFO67FDW* codeunit. This enhancement improves customization and automation by providing public procedures for automatic lot assignment using the FIFO method, for example, when importing sales orders.



# 2501.0.0.0

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 Fresh Bridge extension. To know more, see [What's new in Fresh Bridge, version 2501.0.0.0](#).



# 2403.4.0.0

Release Note • 1/27/2025 • 1 min read

## Enhancements/Modifications

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



# 2403.3.0.0

Release Note • 1/23/2025 • 1 min read

## Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean Standard Measurements extension. To know more, see [Highlights of Standard Measurements, version 2501.0.0.0](#).



# 2403.2.0.0

Release Note • 1/15/2025 • 2 min read

## Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean Buffer Orders extension. To know more, see [What's new in Buffer Orders, version 2401.6.0.0](#).

## Resolved issues

The following issues have been resolved in this release.

ID	Description
251147	An error occurs upon executing the <b>Assign</b> action multiple times on the <b>Trading Board</b> page when assigning quantity to a buffer order.
251171	The system displays incorrect value in the <b>Available Quantity (Base)</b> field on the <b>Trading Board</b> page when item tracking lines are deleted on the associated sales or transfer order created from a buffer order.
250928	The system incorrectly displays details of the linked buffer order in the <b>Linked Document</b> section of the FactBox on the <b>Trading Board</b> page even when the linked buffer order is deleted.
252981	The system fails to inherit the <b>Shipment Date</b> field value on the <b>Reservation Entries</b> page for sales orders created from a buffer order.
251165	The system incorrectly opens the trading board upon executing the <b>Open and Calculate Trading Board</b> action on the <b>Buffer Order</b> page when the <b>Status</b> field is set to <i>Active</i> .
250926	The system fails to update the <b>Trading Board</b> page with the global lot attributes field values upon executing the <b>Open and Calculate Trading Board</b> action on the <b>Buffer Order</b> page.

### Note

These issues occur only when the Aptean [Buffer Orders](#) extension is installed.



# 2403.1.0.0

Release Note • 12/23/2024 • 2 min read

## Enhancements/Modifications

With this release of the Aptean Trading Board extension,

- You can view how many units of an 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, in the **Qty. on Buffer Order (Base)** field on the **Trading Board** page. For more information, see [Use the trading board](#). This enhancement addresses the issue reported in bug ID #250495.

### Note

This field is only visible when the **Advanced View** action is executed and the Aptean [Buffer Order](#) extension is installed.

- This extension has been updated to ensure interoperability with the recent changes in the Aptean Buffer Orders extension. For more information, see [What's new in Buffer Orders, version 2401.4.0.0](#).

## UI/UX changes

The **Qty. on Buffer Order (Base)** field has been added to the **Trading Board** page.

## Resolved issues

The following issues have been resolved in this release.

ID	Description
250494	The system fails to combine the lots in the <b>Assigned Lot(s)</b> field on the <b>Buffer Order</b> page upon executing the <b>Assign</b> action on the <b>Trading Board</b> page.
252978	The system fails to display the trading board entries based on the value selected in the <b>Expand View by Item/Location</b> field on the <b>Trading Board Filter</b> page.



 Note

These issues occur when the Aptean [Buffer Order](#) extension is installed.



# 2403.0.0.0

Release Note • 12/4/2024 • 3 min read

## Features

With this release of the Aptean Trading Board extension, you can:

- Create an assembly order and link it to the trading board from the **Trading Board** page. To know more, see [Create an assembly order from the trading board](#).
- Link the trading board to an existing assembly order. To know more, see [Link the trading board to existing documents](#).
- Open and calculate the trading board from the assembly order header and lines. To know more, see [Open and calculate the trading board from assembly order header](#) and [Open and calculate the trading board from assembly order lines](#).
- Combine trading board lines by item number, location code, trading unit of measure code, unit price, and global lot attributes when assigned to an outbound document. To know more, see [Set up the trading board](#).
- Determine on which date the lot is assigned based on FIFO. To know more, see [Set up the trading board](#).
- Calculate the trading board and assign lots by FIFO automatically from sales and transfer orders. To know more see, [Calculate the trading board and assign lots by FIFO automatically from documents](#).
- Set up the historic price calculation formula and determine whether the system must display it based on the item or lot-level. To know more, see [Set up the trading board](#).
- Perform the following on the **Trading Board** page.
  - View the minimum, maximum, and average sales price per trading board line calculated based on the historic price setup.
  - View additional item description of the available inventory.
  - Expand each trading board entry to view detailed lot-level information.
  - Recalculate available inventory based on selected filters.

To know more, see [Use the trading board](#).

## Enhancements/Modifications

With the enhancements made in this release, you can:

- Run a trading board calculation without selecting the **Location Code** field value on the **Location** FastTab of the **Trading Board Filter** page.
- Edit filters directly on the **Filters** FastTab of the **Trading Board** page.



To know more, see [Use the trading board](#).

## UI/UX changes

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

- The **Assign FIFO** action has been added to the **Trading Board Setup** page.
- The following actions have been added to the **Trading Board** page.
  - Recalculate
  - Assembly Order
- The **Open and Calculate** action has been added to the **Assembly Order** page.
- The **Calculate and Assign by FIFO** action has been added to the header and the **Lines** FastTab of the **Sales Order** and **Transfer Order** pages.
- The **Open and Calculate Trading Board** action has been renamed to **Open and Calculate** on the **Sales Order**, **Transfer Order**, and **Production Order** pages.
- The following fields have been added to the **Trading Board Setup** page.
  - Expand View by Item/Location
  - Combine Lots
  - Calculation Formula
  - Show By
  - Assign FIFO
- The following fields have been added to the **Trading Board** page.
  - Description 2
  - Combine Lots
  - Min. Sales Price
  - Max. Sales Price
  - Average Sales Price
- The following fields have been added to the **Linked Document** section of the FactBox on the **Trading Board** page.
  - Assembly Item
  - Assembly BOM
  - Assembled Quantity
  - Quantity to Assemble
  - Assembly Document Status



## Trading Board

- Quantity to Consume
- Unit Price
- Applied Unit Price
- Applied Price UOM Code

- The fields on the **Filters** FastTab of the **Trading Board** page have been made editable.



# 2402.1.0.0

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 <b>Document Line No.</b> field from the <b>Linked Document</b> FactBox on the <b>Trading Board</b> page after executing the <b>Calculate</b> 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 <b>Open and Calculate Trading Board</b> action on the <b>Lines</b> FastTab of the <b>Buffer Order</b> page.



# 2402.0.0.0

Release Note • 11/20/2024 • 1 min read

## Features

With this release of 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 [Highlights of Buffer Orders, version 2401.0.0.0](#).

## Integrations

The Aptean Trading Board extension has been integrated with the Aptean [Buffer Orders](#) extension. For more information, see [Integration with Aptean Buffer Orders](#).



# 2401.0.0.0

Release Note • 9/18/2024 • 1 min read

## Enhancements/Modifications

With this release of the Aptean Trading Board extension, additional validations have been added to ensure that the system allows the addition of only non-global lot attribute filters on the **Lot Attribute** FastTab of the **Trading Board Filter** page.



# 2301.8.0.0

Release Note • 5/27/2024 • 1 min read

## Enhancements/Modifications

Modifications were made for the Aptean Trading Board extension to accommodate the following changes:

- Procedures were added to enhance the application interaction, improve upgrade tag management, streamline upgrade and installation processes, and provide additional flexibility by managing upgrades on a **per-company** and **per-database** basis.
- Application Area Refresh: Updates were implemented to improve the application area refresh process by integrating a new procedure into the **Enable** codeunit.
- Improved Management of Install and Upgrade Code: The **Install** and **Upgrade** codeunits were updated to streamline the handling of installation, reinstallation, and upgrade processes, ensuring smoother transitions and minimizing disruptions during these operations.
- Centralized License Management Procedures: The existing license management codeunit was modified to use centralized license management procedures, further reducing the need for application-specific adjustments.



# 2301.7.0.0

Release Note • 5/8/2024 • 1 min read

## Enhancements/Modifications

The Swedish translation files have been updated with standard texts for better readability.



# 2301.6.0.0

Release Note • 4/30/2024 • 1 min read

## Resolved issues

The following issue has been resolved in this release:

ID	Description
153506	Performance issue occurs while executing the <b>Assign</b> and <b>Assign &amp; Close</b> actions on the <b>Trading Board</b> page.



# 2301.5.0.0

Release Note • 1/29/2024 • 1 min read

## Enhancements/Modifications

Modifications were made for this extension to accommodate the changes in the Aptean Fresh Bridge extension. To know more, see [What's new in version 2401.2.0.0](#).



# 2301.4.0.0

Release Note • 1/19/2024 • 1 min read

## Enhancements/Modifications

Modifications were made for this extension to accommodate the changes in the Aptean Fresh Bridge extension. To know more, see [What's new in version 2401.1.0.0](#).



# 2301.3.0.0

Release Note • 1/17/2024 • 1 min read

## Enhancements/Modifications

Improvements have been made to the performance of the **Calculate** function on the **Trading Board** page. These enhancements enable efficient calculation of available inventory by considering selected filters on the **Trading Board Filter** page.



# 2301.2.0.0

Release Note • 12/5/2023 • 1 min read

## Enhancements/Modifications

With this release of the Aptean Trading Board extension, you can apply the following filters when calculating the trading board:

- Filter on Customer Profile if the Aptean [Profiles](#) extension is installed.
- Filter on Grower if the Aptean [Lot Management](#) extension is installed.
- Filter on Producer Certificate if Aptean [Producer Certification](#) extension is installed.

For more information, see [Trading Board Filter](#) page and [Filter trading board based on growers and certification](#).

## UI/UX changes

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

- The **Customer Profile** FastTab is added to the **Trading Board Filter** page along with the **Profile No.** field.
- The **External Filter** FastTab is added to the **Trading Board Filter** page along with the **External Filter** field.
- The **Grower** FastTab is added to the **Filter Page**, which is navigated through the **External Filter** field, along with the **No.** field.
- The **Producer Certificate** FastTab is added to the **Filter Page**, which is navigated through the **External Filter** field, along with the **Certification Code** and **Certification No.** fields.



# 2301.1.0.0

Release Note • 11/3/2023 • 1 min read

## Enhancements/Modifications

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

## Resolved issues

The following issue has been resolved in this release:

ID	Description
155720	Unable to enter the Lot No. manually on the Item Tracking Lines of the Sales Return Order.



# 2.2.110139.0

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

## Resolved issues

The following issue has been resolved in this release:

ID	Description
134624	An error occurs on the <b>Item Tracking Lines</b> page when a <b>Lot No.</b> is reused on multiple lines of the document.



# 2.1.108435.0

Release Note • 7/12/2023 • 1 min read

## Resolved issues

The following issue has been fixed in this release:

ID	Description
130558	The Unit Price is calculated without the Line Discount % when a lot number is assigned.



# 2.0.82398.0

Release Note • 6/13/2023 • 1 min read

## Features

You can perform the following activities with the features included in this release:

- Create and Update transfer orders from the **Trading Board** page
- Create and Update production orders from the **Trading Board** page
- Open and calculate trading board from transfer order header and line level
- Open and calculate trading board from production order line and component line
- View information on the underlying transactions that make up the balance shown in the quantity fields by using the drill-down when in advance view
- Set up and modify the Trading Unit of Measure for items to use it on the Trading Board based on your preference



# 1.0.66835.0

Release Note • 6/13/2023 • 1 min read

## Features

You can perform the following activities with the features included in this release:

- Add eight global lot attribute value IDs on the Lot No. Information table
- View the global and non-global lot attributes with their values on the FactBox on the **Trading Board** page
- Calculate lot availability to enable or disable the Available for Trading Board toggle on all lot numbers
- Restrict the reuse of existing lot numbers in incoming documents like purchase and sales return orders when the Aptean Trading Board extension is installed
- View the trading units of measure, such as the purchase unit of measure, sales unit of measure, and the base unit of measure on the **Trading Board** page
- Calculate the available inventory based on the filters set on the **Trading Board** page
- Create and update existing sales orders from the **Trading Board** page
- Open and calculate trading board from sales order header and line level
- Define the pricing strategy on the **Trading Board Setup** page
- Integrate Trading board with Aptean Advanced Pricing extension
- Register the Trading board price when updating an existing sales order line
- View the issues encountered when assigning a trading board line to a sales line with an error description



# Introduction

Article • 10/22/2025 • 1 min read

With the Aptean Trading Board (TRB) extension, you can view both expected and received inventory on the level of lot numbers per location. You can directly create new documents, update existing documents, and assign lot numbers to them with price from the **Trading Board** page. Alternatively, you can open the trading board from an existing document's header and lines.



# Setup

Article • 12/4/2024 • 1 min read

The following setups are required.

- [Manage permission sets](#)
- [Set up the trading board](#)
- [Manage pricing](#)
- [Manage lot numbers](#)



# Manage permission sets

Article • 8/14/2024 • 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 *TRADINGBOARD67FDW*.

## Indirect permission sets

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

The indirect permission set ID for this extension is *TRDGBOARDBASIC67FDW*.

## 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 Trading Board extension, ensuring secure and role-based access.



# Set up the trading board

Article • 10/22/2025 • 4 min read

The following procedure outlines how to configure default setups.



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

The **Trading Board Setup** page opens.

2. On the **General** FastTab, enter the required information in the following fields:

Field	Description
Pricing Strategy	Select the default pricing strategy in trading board entries. The available options are: <i>Price calculation</i> or <i>Manual</i> . For more information, see <a href="#">Manage pricing</a> .
Production Order Status	<p>Select the default production order status for new production orders created via the <b>Trading Board</b> page. The available options are:</p> <ul style="list-style-type: none"> <li>• <i>Planned</i></li> <li>• <i>Firm Planned</i></li> <li>• <i>Released</i></li> </ul>
Expand View by Item/Location	<p>Select how to calculate and arrange trading board entries on the <b>Trading Board</b> page by default. The available options are:</p> <ul style="list-style-type: none"> <li>• <i>Standard</i></li> <li>• <i>Item No. &amp; Location Code</i></li> <li>• <i>Location Code &amp; Item No.</i></li> </ul>
Combine Lots	<p>Select whether the trading board lines are combined by item number, location code, trading unit of measure code, unit price, and global lot attributes when assigned to an outbound document. The available options are:</p> <ul style="list-style-type: none"> <li>• <i>Uncombine</i></li> <li>• <i>Try to Combine</i></li> </ul>
Calculation Type	<p>Select the calculation type to apply to trading board entries by default. The available options are:</p>



	<ul style="list-style-type: none"> <li>• <b>Blank:</b> The trading board displays available quantities.</li> <li>• <b>Conflict:</b> The trading board displays quantity or availability date conflicts between trading board entries and the related demand lines.</li> </ul> <p>For more information, see <a href="#">Manage demand lines</a>.</p>
<b>Historical Price</b>	
Calculation Formula	<p>Enter a negative time period value (days, weeks, months, or years) to calculate the minimum/maximum and average sales price for an item or lot. For example, -2M. This field is visible only when the <b>Expand View by Item/Location</b> field is set as <i>Item No. &amp; Location Code</i> or <i>Location Code &amp; Item No.</i></p> <p>The system considers prices from the related sales orders, sales invoices, posted sales orders, and posted sales invoices for the historic price calculation.</p>
Show By	<p>Select whether the system must display historic price calculation for trading board lines based on the item or lot level. The available options are:</p> <ul style="list-style-type: none"> <li>• <i>Item No.</i></li> <li>• <i>Lot No.</i></li> </ul> <p>This field is visible only when the <b>Expand View by Item/Location</b> field is set as <i>Item No. &amp; Location Code</i> or <i>Location Code &amp; Item No.</i></p>
<b>FIFO Assignment</b>	
Assign FIFO	<p>Select the date on which the lot is assigned based on FIFO. The available options are:</p> <ul style="list-style-type: none"> <li>• <i>Blank</i></li> <li>• <i>Lot Creation Date</i></li> <li>• <i>Lot Receipt Date</i></li> </ul>
<b>Feature Update</b>	
Remove Fresh Dependency Feature	<p>Turn on the toggle to manually remove dependencies with other Aptean Fresh extensions, such as the Aptean <a href="#">Fresh Bridge</a> extension. This allows you to install the Aptean Trading Board extension without requiring other Aptean Fresh extensions and all relevant fields from the Aptean Fresh extensions will be transferred to the Aptean Trading</p>



Board extension. Otherwise, the system will automatically apply this change when updating to Business Central, version 29.

3. On the action bar, select **Update Lot. No Information** to update lot number information. This is a one-time task to be done after installing the Aptean Trading Board extension. For more information, see [Manage lot numbers](#).



# Manage pricing

Article • 4/3/2023 • 2 min read

## Set up pricing

Based on the business model of the company using the trading board, different business rules concerning different pricing methods might exist. One company might use the standard Business Central price list functionality and another company might register sales prices per sales line manually. Depending on the strategy, price registration via the trading board should or should not be possible. To support this, it is possible to define a pricing strategy in the **Pricing Strategy** field on the **Trading Board Setup** page.

The available options are:

- **Manual:** This means the unit price on the trading board lines is always copied to the sales lines even when empty. In the background, a price list price or a unit price exists on the item. This option also implies that the **Unit Price** field on the trading board is editable.
- **Price calculation:** This means the unit price on the trading board lines is always ignored. The system will always pick up the unit price for the sales line from the sale price list, or item card or leave it blank when no price is found. This option implies that the **Unit Price** field on the trading board is not editable.

## Working with prices on the trading board

The pricing strategy defined on the **Trading Board Setup** page is visible on the trading board line. When set to **Manual**, the **Unit Price** field is editable. However, it is possible to change the pricing strategy to **Sales price calculation** for a particular trading board line. This will empty the **Unit Price** field and make it non editable. On creating the sales line, the system will retrieve a sales price according to the logic of the price calculation method on the sales line.

Along the same logic, it is possible to overrule the **Pricing Strategy** from **Price calculation** to **Manual** on the trading board. This implies that on creation of the sales line, the price as registered on the trading board will be used (even if it is 0), which will overrule the sales price logic of the price calculation method.



# Manage lot numbers

Article • 6/5/2025 • 3 min read

The system calculates and displays available inventory and lots on the **Trading Board** page. The system only displays lots that are currently available for use. This ensures faster performance and a focused user experience, as only actionable data is presented. The lots that are not available for use are not visible on the trading board. For example, when a purchase order is received, the associated lots are used to sell and ship items to the customer, these lot numbers are no longer calculated for or visible on the trading board.

The **Available for Trading Board** toggle on the **Lot No. Information Card** page must be turned on for the system to include a lot number in the trading board calculation. The system turns on the **Available for Trading Board** toggle for all lot numbers entering the system (via purchase, production orders, or other sources), after calculating the availability of the lots.

## Important

When the Aptean Trading Board extension is first installed, the trading board does not include existing lot numbers in the trading board calculation because the **Available for Trading Board** toggle is turned off for existing lot numbers by default. To include these lot numbers in the trading board calculation, you must execute the **Update Lot. No Information** action on the **Trading Board Setup** page.

To calculate the availability of lots, follow these steps:



1. Select the Search icon , enter **Calculate Lot Availability**, and then choose the related link.

The **Calculate Lot Availability** report page opens.

2. You can add filters, as required, to calculate the availability of specific lots.

> **[!NOTE]**

> It is recommended to run the calculation without filters so all lot numbers are calculated.

3. Select **OK**.

The system turns on the **Available for Trading Board** toggle for the lot numbers that meet any one of the following requirements:

- Open item ledger entries exist.
- Purchase lines exist with a positive remaining quantity.
- Sales return order lines exist with a positive remaining quantity.
- Released production order lines exist with a positive remaining quantity.
- Assembly order lines exist with a positive quantity.



 Note

- You can create a job queue entry to run the **Calculate Lot Availability** report automatically, ensuring lot availability is calculated periodically according to your business requirements.
- The object ID of the **Calculate Lot Availability** report is 71159726. For more information about creating job queue entries, see [Use job queues to schedule tasks](#).



# Use the trading board

Article • 10/22/2025 • 11 min read

You can view available stock based on lot numbers per location and plan transactions with documents like sales, transfer, production, or assembly orders.

The following procedure outlines how to use the trading board.



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

The **Trading Board** page opens.

2. On the action bar, select **Calculate**.

The **Trading Board Filter** page opens.

3. Select the following filters as required.

Filter	Description
Expand View by Item/Location	<p>Select how to calculate and arrange trading board entries on the <b>Trading Board</b> page. The available options are:</p> <ul style="list-style-type: none"> <li>• <i>Standard</i></li> <li>• <i>Item No. &amp; Location Code</i></li> <li>• <i>Location Code &amp; Item No.</i></li> </ul> <p>By default, the system displays the value set up on the <b>Trading Board Setup</b> page.</p>
Calculation Type	<p>Specifies the calculation type to apply to trading board entries. The default value is derived from the <b>Trading Board Setup</b> page, but you can change it if required.</p> <p>The available options are:</p> <ul style="list-style-type: none"> <li>• <i>Blank</i>: The trading board only displays available quantities.</li> <li>• <i>Conflict</i>: The trading board displays quantity or availability date conflicts between trading board entries and the related demand lines.</li> </ul> <p>For more information, see <a href="#">Manage demand lines</a>.</p>
Location	
Location Code	Select a location.
Push List	



Push List Code	Select the push list code to view items available from the push list. For more information, see <a href="#">Manage the push list</a> .
Customer Profile	
Profile No.	Enter a profile number. The system filters and displays lot numbers related to the specified profile based on the configured inclusions and exclusions. This field is visible only when the Aptean <a href="#">Profiles</a> extension is installed.
External Filter	Select the filters based on growers and certification. For more information, see <a href="#">Filter the trading board based on growers and certification</a> .
Lot	Select global lot attribute filters. The global lot attributes are set up on the <a href="#">Advanced Attribute Setup</a> page.
Date	
Available From	Select the availability from date. The lots which are expected in the selected date range will be displayed on the <b>Trading Board</b> page. Additionally, the lots that are received in inventory and do not have availability date are always shown.
Available To	Select the availability to date. The lots which are expected in the selected date range will be displayed on the <b>Trading Board</b> page. Additionally, the lots that are received in inventory and do not have availability date are always shown.
Lot Attribute	Select the lot attribute filters.
Trading Unit of Measure	
Trading Unit of Measure	Select a trading unit of measure: <i>Base Unit of Measure</i> , <i>Purchase Unit of Measure</i> , or <i>Sales Unit of Measure</i> . For more information, see <a href="#">Filter the trading board based on growers and certification</a> .
Filter: Item	Select item-related filters. Additionally, you can add filters as necessary.
Filter: Lot No. Information	Select lot number related filters. Additionally, you can add filters as necessary.

 **Note**

The system displays the *Last used options and filters* option in the **Use default values from** field by default, specifying that the system applies previously used options and filters to the **Trading Board Filter** page.

**4. Select OK.**

The trading board entries are displayed on the **Entries** FastTab of the **Trading Board** page.



By default, you can view the following fields in the **Simple view**.

Field	Description
Item No.	Item number of the lot number defined when calculating the trading board.
Description	Specifies a default text to describe the item.
Lot No.	Specifies the code for the number series that will be used to assign numbers to the lot number of the available inventory.
Location Code	Specifies the location code for the displayed quantities.
Global Attributes	Global lot attributes 1 to 8 with their corresponding values.
Availability Date	Specifies the date when the lot number is available.
Available Quantity (Base)	<p>Specifies the quantity available which is to be used in the base unit of measure. This value is calculated as:</p> $\text{Available Quantity (Base)} = \{\text{Inventory (Base)} + \text{Qty. on Purchase Order (Base)} + \text{Qty. on Sales Return Order (Base)} + \text{Qty. on Production Order (Base)} + \text{Qty. on Assembly Order (Base)} + \text{Qty. on Inbound Transfer (Base)}\} - \{\text{Qty. on Sales Order (Base)} + \text{Qty. on Prod. Component (Base)} + \text{Qty. on Asm. Component (Base)} + \text{Qty. on Purchase Return Order (Base)} + \text{Qty. on Outbound Transfer (Base)}\}$
Base Unit of Measure Code	Specifies the base unit used to measure the item, such as piece, box, or pallet. The base unit of measure also serves as the conversion basis for alternate units of measure.
Quantity	Enter the item quantities you want to assign to the linked document in the trading unit of measure on a lot level. This field value cannot exceed the value on the <b>Available Quantity (Base)</b> field.
Unit Price	Enter the unit price you want to use in the trading unit of measure on a lot level. This field is editable only when the <b>Pricing Strategy</b> field on the <b>General</b> FastTab of the <b>Trading Board Setup</b> page is set to <i>Manual</i> .
Description 2	Specifies the additional item description of the available inventory.
Min. Sales Price	Specifies the minimum sales price of the trading board line displayed in the base unit of measure based on the historic price setup.
Max. Sales Price	Specifies the maximum sales price of the trading board line displayed in the base unit of measure based on the historic price setup.



Avg. Sales Price	Specifies the average sales price of the trading board line displayed in the base unit of measure based on the historic price setup.
Frozen	Indicates if the price is frozen. It is available only when the extension Aptean <a href="#">Advanced Pricing</a> extension is installed. For more information, see <a href="#">Integration of Trading Board with Aptean Advanced Pricing extension</a> .
Conflict	Specifies whether there is a quantity or an availability date conflict with the existing demand lines. For more information, see <a href="#">Manage conflict calculations</a> .
Error	Specifies if an error occurred when assigning the lot number to a document. For more information, see <a href="#">Error handling in the trading board</a> .

5. On the action bar, select **Advanced view** to view the following additional fields:

Field	Description
Available Quantity (Sales)	Specifies the quantity available calculated to the sales unit of measure.
Sales Unit of Measure Code	Specifies the sales unit of measure code associated with the item.
Available Quantity (Purchase)	Specifies the quantity available calculated to the purchase unit of measure.
Purchase Unit of Measure Code	Specifies the purchase unit of measure code associated with the item
Inventory (Base)	Specifies the remaining quantity in inventory in the base unit of measure.
Qty. on Purchase Order (Base)	Specifies the quantity to be received in purchase lines in the base unit of measure for this lot on this location.
Qty. on Sales Return (Base)	Specifies the quantity to be received in sales return lines in the base unit of measure for this lot on this location.
Qty. on Production Order (Base)	Specifies the remaining quantity in Production lines in the base unit of measure for this lot on this location.
Qty. on Assembly Order (Base)	Specifies the remaining quantity in Assembly lines in the base unit of measure for this lot on this location.
Qty. on Inbound Transfer (Base)	Specifies the quantity to be received in transfer lines in the base unit of measure for this lot on this location.



Qty. on Sales Order (Base)	Specifies the quantity to be shipped in sales lines in the base unit of measure for this lot on this location.
Qty. on Prod. Component (Base)	Specifies the remaining quantity in component lines in the base unit of measure for this lot on this location.
Qty. on Asm. Component (Base)	Specifies the remaining quantity in assembly lines in the base unit of measure for this lot on this location.
Qty. on Purchase Return Order (Base)	Specifies the quantity to be shipped in purchase return lines in the base unit of measure for this lot on this location.
Qty. on Outbound Transfer (Base)	Specifies the quantity to be shipped in transfer lines in the base unit of measure for this lot on this location.
Qty. on Buffer Order (Base)	Specifies how many units of an 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.
Source No.	Specifies the Vendor No. for the lot number.
Source Name.	Specifies the Vendor Name for the Vendor No.
Document No.	Specifies the purchase order number.
Pricing Strategy	Specifies the pricing strategy defaulted from <b>Trading Board Setup</b> page. For more information, see <a href="#">Integration of Trading Board with Aptean Advanced Pricing extension</a> .
Trading Unit of Measure Code	Specifies the trading unit of measure code in the sales unit associated with the item.
Error Text	Specifies the error text produced when assigning lot to document line. For more information, see <a href="#">Error handling in the trading board</a> .
Combine Lots	<p>Specifies whether this trading board line is combined by item number, location code, trading unit of measure code, unit price, and global lot attributes when assigned to an outbound document. The available options are:</p> <ul style="list-style-type: none"> <li>• <i>Uncombine</i></li> <li>• <i>Try to Combine</i></li> </ul> <p>For more information, see <a href="#">Set up the trading board</a>. If you set the <b>Pricing Strategy</b> field to <i>Manual</i> or make changes to the <b>Trading Unit of Measure Code</b> field, the system changes the <b>Combine Lots</b> field value of the line to <i>Uncombine</i>.</p>



6. On the **Demand Lines** FastTab, you can view details about the conflicts between the selected trading board entry and the demand lines related to corresponding outgoing documents.

You can edit the quantity and/or dates on documents linked to specific trading board entries to resolve the conflict and ensure that all demands are fulfilled. For more information, see [Manage conflict calculations](#).

 **Note**

- On the **Filters** FastTab of the **Trading Board** page, you can edit the filters as required.
- On the action bar, select **Calculate > Recalculate** to recalculate the trading board entries based on the filters selected.

You can add entries to the push list and open the push list directly from the trading board. For more information, see [Manage the push list from the trading board](#).

You can link the trading board to existing sales, transfer, production, or assembly orders. For more information, see [Link the trading board to existing documents](#).

Additionally, you can create sales, transfer, production, or assembly orders and link the trading board to the documents created. For more information, see [Create and link documents from the trading board](#).

After linking a document 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 document. For more information, see [Assign quantities to linked documents](#).



# View details on the FactBox

Article • 12/4/2024 • 3 min read

You can view additional details on the FactBox of the **Trading Board** page.

On the **Lot Attributes** section of the FactBox, you can view all the non-global lot attributes followed by the global lot attributes arranged in an alphabetical order, with the attribute name and value based on the lot.

On the **Item Details** section of the FactBox, you can view the following details:

Field	Description
Item No.	Specifies the item number of the selected trading board entry.
Availability	Specifies how many base units of the item in the selected trading board entry are available on the work date across all locations.
Base Unit of Measure	Specifies the base unit of measure of the item.
Item Unit Price	Specifies the unit price of the item.

On the **Linked Document** section of the FactBox, you can view the following details of the linked document.

Field	Description
Document	Specifies the document number of the linked document.
Sell-to Customer No.	Specifies the customer number on the linked document.
Sell-to Customer Name	Specifies the customer's name on the linked document.
Location Code	Specifies the location of the linked document.
Currency Code	Specifies the currency code of the linked document.
Posting Date	Specifies the posting date of the linked document.
Order Date	Specifies the order date of the linked document.
Shipment Date	Specifies the shipment date of the linked document.
Status	Specifies the status of the linked document.
Transfer-from Code	Specifies the transfer-from code of the linked document.
Transfer-to Code	Specifies the transfer-to code of the linked document.



Transfer Document Status	Specifies the document status of the linked document.
Receipt Date	Specifies the receipt date of the linked document
Warehouse Activities	Specifies if transport order lines exist for the linked document.
Transport Activities	Specifies if warehouse activity lines exist for the linked document.
Document Line No.	Specifies the document line number.
Due Date	Specifies the due date of the linked document.
Starting Date	Specifies the starting date of the linked document.
Produced Item	Specifies the item that will be created.
Produced Quantity	Specifies the quantity of the item that will be created.
Quantity	Specifies the quantity of the linked document.
Assembly Item	Specifies the number and description of the assembled item.
Assembly BOM	Specifies whether the assembly item has associated assembly BOMs.
Quantity to Assemble	Specifies the quantity to assemble on the linked document.
Unit of Measure	Specifies the unit of measure of the linked document.
Assembly Document Status	Specifies the document status of the linked assembly order.
Quantity to Consume	Specifies how many units of the assembly component you want to post as consumed when you post the assembly order.
Unit Price	Specifies the unit price on the linked document.
Applied Unit Price	Specifies the applied unit price of the linked document.
Applied Price UOM Code	Specifies the unit of measure used to measure the applied unit price of the linked document.



# Filter the trading board based on growers and certification

Article • 12/5/2023 • 1 min read

You can filter the lot numbers that are associated with the specific growers and certificates using the Trading Board Filter function. To perform this function, follow these steps:

1. Open the **Trading Board Filter** request page.
2. On the **External Filter** FastTab, select the value in the **External Filter** field.

The **Filter Page** opens.

3. On the **Grower** FastTab, in the **No.** field, enter the grower number(s).
4. On the **Producer Certificate** FastTab, in the **Certification Code** field, enter the code for certification(s).
  - > [!NOTE]
    - > If the **Certification No.** field is left blank, the system considers all the certification numbers associated with the specified certification code(s).
5. In the **Certification No.** field, enter the certification number(s).

Note: Only certification numbers associated with the specified certification code can be selected.

6. Select **OK**.

Lot numbers that are associated with the specified growers, certification codes, and certification numbers will be filtered and presented on the **Trading Board** page.



# Understand the trading unit of measure

Article • 4/3/2023 • 2 min read

The trading board provides the option to initially set the Trading Unit of Measure with any of the following options such as the sales unit of measure, purchase unit of measure, or base unit of measure. The option can be set in the page opened when initially calculating the trading board and is saved in follow up search queries. When setting the value to option sales unit of measure (typical setup for sales agents), all trading board lines will have the Trading Unit of measure set to the sales unit of measure of the item. This also means that the quantity the sales agent registers to be allocated is interpreted in the sales unit of measure.

After calculating the trading board in a specific trading unit of measure, it is possible to change it afterwards. The trading unit of measure as selected will be copied to the document line on execution of any of the assign functions. This applies to all documents that can be created or updated from the trading board.

When the trading board is opened from a line level of the document, changing the Trading Unit of Measure in one entry will change the Trading Unit of Measure for all entries for the line. Changing the trading unit of measure after registering the quantity on the trading board line will result in an automatic recalculation.



# Manage demand lines

Article • 10/22/2025 • 2 min read

The system identifies conflict between the supply and demand of items based on quantity and availability parameters. This improves visibility and prevents inventory allocation mismatches.

The system compares the quantity and availability dates for items in the trading board entries on the [Trading Board](#) page with the corresponding values in the following demand documents:

- Sales Order
- Purchase Return Order
- Transfer Order
- Production Consumption
- Assembly Consumption

For example, if a trading board line has a quantity of *900 KG* for an item, but the total demand for the same item across multiple documents (such as a sales order for *315 KG* and a production consumption line for *600 KG*) is *915 KG*, the system identifies this as a quantity conflict because the demand exceeds the available supply.

Similarly, if a trading board line has a quantity of *900 KG* for an item and the availability date of *10/5/2025*, but a sales order for the same quantity of the item is going to be shipped on *10/3/2025*, the system identifies it as an availability date conflict because the demand date precedes the available date.

You can edit the quantity and/or availability dates on documents linked to specific trading board entries to fix the conflict and ensure that all demands are fulfilled.



# Set up demand lines

Article • 10/22/2025 • 1 min read

You can set up the system to perform conflict calculations by default in the **Calculation Type** field on the **Trading Board Setup** page. For more information, see [Set up the trading board](#).



# Manage conflict calculations

Article • 10/22/2025 • 3 min read

You can apply the conflict calculation type when calculating the trading board in the **Calculation Type** field on the **Trading Board Filter** page. For more information, see [Use the trading board](#).

The system compares the quantity and availability dates for items in the trading board entries with the corresponding values in demand documents and displays *Conflict* in the **Conflict** field on the **Entries** FastTab of the **Trading Board** page.

On the **Demand Lines** FastTab, you can view details about the conflicts between the selected trading board entry and the demand lines related to corresponding outgoing documents in the following fields:

Field	Description
Conflict	Specifies whether the demand line has a quantity or availability date conflict, meaning that the demand cannot be fulfilled.
Table ID	Specifies the table ID associated with the demand line.
Document Type	<p>Specifies the document type associated with the demand line. The following outgoing documents are applicable:</p> <ul style="list-style-type: none"> <li>• Sales Order</li> <li>• Purchase Return Order</li> <li>• Transfer Order</li> <li>• Production Consumption</li> <li>• Assembly Consumption</li> </ul>
Document No.	Specifies the document number associated with the demand line. You can select this value to open the document.
Item No.	Specifies the item number associated with the demand line.
Description	Specifies the description of the item in the demand line. You can select this field value to view details of the item.
Variant Code	Specifies the variant code associated with the item in the demand line.
Location Code	Specifies the location code associated with the demand line.



Quantity (Base)	Specifies the quantity for the demand expressed in the base unit of measure. If this field value is red in color, there is a quantity conflict, meaning that the available quantity of the item in the specified lot and location is insufficient to fulfill all demand lines.
Shipment Date	Specifies the shipment date for the demand. If this value is red in color, there is a date conflict, meaning that the expected receipt date of the lot number is later than the shipment date of the demand line.

On the action bar, select **Advanced View** to view the following additional fields:

Field	Description
Document Line No.	Specifies the document line number associated with the demand line.
Lot No.	Specifies the lot number associated with the demand line.
Base Unit of Measure Code	Specifies the base unit of measure associated with the item in the demand line.
Available Quantity (Purchase)	Specifies the available quantity expressed in the purchase unit of measure of the item.
Purchase Unit of Measure Code	Specifies the purchase unit of measure code associated with the item in the demand line.
Available Quantity (Sales)	Specifies the available quantity expressed in the sales unit of measure of the item.
Sales Unit of Measure Code	Specifies the sales unit of measure code associated with the item in the demand line.
Expected Receipt Date	Specifies the expected receipt date for the demand.
Created By	Specifies the user who created the demand.

You can edit the quantity and/or availability dates on the trading board entries to resolve the conflict and ensure that all demands are fulfilled.



# Manage the push list

Article • 7/2/2025 • 4 min read

You can create and manage a push list of items, lots, or locations that are prioritized for sale. For example, if you want to sell items from an aged stock at a subsidized price, you can add those items to the push list to indicate that they are prioritized for the sales process.

To add an item or lot to the push list manually, follow these steps:



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

The **Push List** page opens.

2. On the action bar, select **New** to add a new line and then enter the required information in the following fields:

Field	Description
Item No.	Select an item to add to the push list entry.
Description	Specifies the description of the selected item. The system displays this field value when the <b>Item No.</b> field value is selected.
Variant Code	Select the variant of the item to add to the push list entry. This field is editable only when the <b>Item No.</b> field value exists.
Location Code	Select the location to add to the push list entry.
Lot No.	Select the lot number to add to the push list entry.
Code	Specifies the push list entry code. The system automatically sets this field value to <i>DEFAULT</i> .
Line No.	Specifies the push list line number.
Start Date	Select the date from which the push list entry is applicable.
End Date	Select the date until which push list entry is applicable. The system automatically deletes the push list entry when the work date exceeds the end date when running the <b>Calculate Lot Availability</b> report. For more information, see <a href="#">Manage lot numbers</a> .
Comments	Enter additional comments to the push list entry.



 Note

You must select a value in at least one of the following fields: > - Item No.

- > - Location Code
- > - Lot No.

The push list entry is created.

Further, you can use the trading board to view items available from the push list and add them to sales orders directly. For more information, see [Open and calculate the trading board from sales order lines](#).

## Manage the push list from the trading board

Select the required entries and then execute the **Add to Push List** action to add items from the **Trading Board** page to the push list. The system adds the selected entries to the **Push List** page.

You can view the push list directly from the **Trading Board** page by executing the **Open the Push List** action.



# Link the trading board to existing documents

Article • 12/4/2024 • 1 min read

You can link trading board entries to existing documents from the **Trading Board** page.

The following procedure outlines how to link trading board entries to existing documents.

1. Open the **Trading Board** page.
2. On the action bar, select **Select Document** and then select the following actions as required.

Action	Description
Sales Order	Open the <b>Sales List – Order</b> page to view a list of sales orders that can be linked to the trading board.
Transfer Order	Open the <b>Transfer Orders</b> page to view a list of transfer orders that can be linked to the trading board.
Production Order	Open the <b>Prod. Order Line List</b> page to view a list of production orders that can be linked to the trading board.
Assembly Order	Open the <b>Assembly Orders</b> page to view a list of production orders that can be linked to the trading board.

3. Select the documents you want to link the trading board with and then select **OK**.

The trading board is linked to the selected documents.



# Create and link documents from the trading board

Article • 4/3/2023 • 1 min read

Besides giving insights into the availability of inventory, the trading board also supports initiating commercial and logistical transactions. It is possible to create and update documents from the trading board page directly.

## See also

- [Create a sales order from the trading board](#)
- [Create a transfer order from the trading board](#)
- [Create a production order from the trading board](#)



# Create a sales order from the trading board

Article • 4/3/2023 • 2 min read

You can perform the following actions after calculating the available inventory based on the filters applied on the **Trading Board Filter** page.

1. On the **Trading Board** page, on the action bar, select **New Document > Sales Order**. Alternatively, click **Alt+1** to create a sales order.
2. In the **Sell-to Customer No.** field, select the customer number.

 **Note**

Other fields on the **Sales Order** page such as **Sell-to Customer Name**, **Salesperson Code**, **Bill-to Customer No**, **Bill-to Customer Name**, **Ship-to Code**, **Ship-to Name**, **Shipping Agent Code**, and **Shipment Method Code** are now filled with standard information from the customer card.

3. In the **Requested Delivery Date** field, select the date on which the customer has asked for the order to be delivered.
4. In the **Shipment Date** field, select the date on which the items on the document will be shipped.
5. Select **OK**.

The sales order is created for the customer and attached as a linked document on the trading board.

The **Linked Document** FactBox displays the following information:

Field	description
Document	Specifies the document number of the linked sales order header.
Sell-to Customer No.	Specifies the customer number on the linked sales order header.
Sell-to Customer Name	Specifies the customer's name on the linked sales order header.
Location Code	Specifies the location of the linked sales order header.
Currency Code	Specifies the currency code of the linked sales order header.
Posting Date	Specifies the posting date of the linked sales order header.
Order Date	Specifies the order date of the linked sales order header.
Shipment Date	Specifies the shipment date of the linked sales order header.
Status	Specifies the status of the linked sales order header.



Warehouse Activities	Specifies if transport order lines exist for the sales order.
Transport Activities	Specifies if warehouse activity lines exist for the sales order.

 Note

These fields are displayed in the FactBox only when values exist for it.



# Create a transfer order from the trading board

Article • 4/3/2023 • 2 min read

You can perform the following actions after calculating the available inventory based on the filters applied on the **Trading Board Filter** page. You can transfer inventory items between locations by creating transfer orders to complete your sales order.

To create a transfer order from the trading board:

1. On the **Trading Board** page, on the action bar, select **New Document > Transfer Order**. Alternatively, select **Alt+3** to create a transfer order.
2. On the **General** FastTab, in the **Transfer-from Code** field, select the location from which the transfer order is shipped.
3. In the **Transfer-to Code** field, select the location the transfer order is received on.
  - > **[!NOTE]**
  - > - In case a transfer route is set up for the Transfer-to and Transfer-from code combination, the In-Transit and Shipping agent codes default from the **Transfer route specification** page.
  - > - On the **Transfer from** FastTab, the **Shipment Date** field is filled with the current working date.
  - > - On the **Receipt Date** FastTab, the **Receipt Date** field is filled with the current working date. In case a transfer route is setup for the combination of Transfer-to and Transfer-from code, and the shipping agent the Shipping agent service code has a default shipping time setup, this date formula is used to calculate the receipt date based on the shipping date.
4. Select **OK**.

The transfer order is created from the trading board as a **Linked** document and the **FactBox** is updated.



# Create a production order from the trading board

Article • 4/3/2023 • 2 min read

The trading board allows you to create a production order when you need to plan production activities for an existing stock. The Production order created is for the Output item and the allocation you perform from the trading board will result in a component line. You can perform the following actions after calculating the available inventory based on the filters applied on the **Trading Board Filter** page.

To create a production order from the trading board:

1. On the **Trading Board** page, on the action bar, select **New Document > Production Order**.  
Alternatively, select **Alt+7** to create a production order.
2. On the **General** FastTab, in the **Status** field, select the status of the production order.  
By default, the status is based on the **Production Order Status** option selected on the **Trading Board Setup** page.
3. In the **Source Type** field, select **Item**.
4. In the **Source No.** field, select the item to be produced.
  - > **[!NOTE]**
  - > The **Description** and **Unit of Measure** fields are populated based on the source number selected.
5. In the **Quantity** field, enter the number of items planned for production.
  - > **[!NOTE]**
  - > By default, the **Due Date** field is filled with the current work date. The date can be changed and represents the date the output is available for outgoing order types like e.g. sales orders.
6. On the **Scheduling** FastTab, in the **Scheduling Direction** field, select **Backward/Forward** for the scheduling to be refreshed backward or forward.
7. In the **Create Inbound Request** field, turn on the toggle to create an inbound request when calculating and updating the production order.
8. On the **Posting** FastTab, in the **Location Code** field, use the dropdown menu to select the location.
9. Select **OK**.  
A production order is created from the trading board and attached as a linked document. Subsequently, the FactBox is updated with its values from the linked document.
10. Based on setup of the selected output item, the system will automatically populate a production BOM and/or routing and refresh the production order to create routing and component lines.



# Create an assembly order from the trading board

Article • 12/4/2024 • 2 min read

The following procedure outlines how to create an assembly order from the trading board and link it to the trading board.

1. On the **Trading Board** page, on the action bar, select **New Document > Assembly Order**.

Alternatively, select the Alt+5 keyboard shortcut to create an assembly order.

The **New Assembly Order** page opens.

2. On the **General** FastTab, enter the required information in the following fields:

Field	Description
Item No.	Select the number of the item that is being assembled with the assembly order.
Description	Specifies the description of the assembly item.
Quantity	Enter how many units of the assembly item are to be assembled with the assembly order.
Quantity to Assemble	Enter how many of the assembly item units are to be partially posted. This field value must not exceed the <b>Quantity</b> field value.
Unit of Measure Code	Select how each unit of item or resource is measured.
Due Date	Select or enter the date when the assembled item is due to be available for use.
Assembly BOM	Specifies whether an assembly BOM is linked to the assembly item.

3. On the **Posting** FastTab, in the **Location Code** field, select the location to which you want to post the output of the assembly item.

4. Select **OK**.

The assembly order is created and linked to the trading board.



# Open and calculate the trading board from documents

Article • 4/3/2023 • 1 min read

You can access the trading board from documents and view the availability of item based on the location and global lot attributes specified.

## See also

- [Open and calculate the trading board from sales order header](#)
- [Open and calculate the trading board from sales order lines](#)
- [Open and calculate the trading board from transfer order header](#)
- [Open and calculate the trading board from transfer order lines](#)
- [Open and calculate the trading board from production order lines](#)
- [Open and calculate trading board from the production order component lines](#)



# Open and calculate the trading board from sales order header

Article • 4/3/2023 • 2 min read

To open the trading board from a sales order header:

1. Go to the required sales order.
2. On the action bar, select **Actions > Functions > Open and Calculate Trading Board**.  
Or  
Alternatively, you can use **Alt+W**.

The **Trading Board Filter** request page opens with the **Location**, **Availability To**, and **Profile No.** fields populated based on the sales order.

- The **Location** field is automatically filled from the corresponding field on the sales order header.
- The **Availability To** field is automatically filled from the shipment date on the sales order header.
- The **Profile No.** is automatically filled from the corresponding field on the sales order header. This field is visible only when the [Aptean Profiles](#) extension is installed.

You can change the values of the **Location**, **Availability To**, and **Profile No.** fields, and add additional filters with values on the **Trading Board Filter** request page.

Once a profile is selected on the **Trading Board Filter** request page, setting specific filters for global lot attributes, growers, and certificates is no longer possible, as the profile already defines the inclusions and exclusions for these elements.

## Note

For profiles, initially, the profiles associated with the customer are displayed. You can access the complete list of profiles by clearing the filter.

Subsequently, you can use the Assign actions to assign the trading board entries that have quantities to the lines of the linked sales document. For more information, see [Assign actions](#).



# Open and calculate the trading board from sales order lines

Article • 7/2/2025 • 3 min read

In some cases, you may want to quickly see the availability of a specific item or sales line. It is possible to open the trading board from a sales line.

1. Go to the required sales order.
2. Select the sales order line.
3. On the **Lines** FastTab, on the action bar, select **Line > Functions > Open and Calculate Trading Board** to calculate the entries based on the values of the sales order line.

Alternatively, you can use **Ctrl+Alt+W**.

The system opens the **Trading Board** page and executes the **Calculate** action automatically based on the following sales line fields as filters.

Filter	Description
Item No.	This is the item number in the sales order line.
Location Code	This is the location code in the sales order line.
Availability Date To	This is the shipment date in the sales order line.
Global lot attributes	These are the global lot attribute values of the item.

## Note

- You can view the items available from the push list by adding a filter in the **Push List Code** field. For more information, see [Manage the push list](#).
- You cannot calculate the trading board from the sales order line when the sales order is in *Released* status. Also, you cannot execute the **Open and Calculate Trading Board** action when the sales line has a quantity shipped or when present in a logistical document.

4. On the **Entries** FastTab, in the **Quantity** field, enter the number of items to be sold.
  - > [!NOTE]
  - > The value should not exceed the available quantity.
5. In the **Unit Price** field, enter the price per trading unit of measure based on the currency of the linked document. Whether the **Unit Price** field is editable is determined by the pricing strategy setup on the **Trading Board Setup** page. For more information, see [Pricing on the Trading Board](#).
6. Use the assign actions to assign the trading board entries that have quantities to the line of the linked sales document. For more information, see [Assign actions](#). In the case where multiple lot numbers are selected, all the



quantities will be added on the same sales order line.

The FactBox now displays the linked sales order number and line number when you select the trading board entry.

 Note

You can also use the **Calculate** function again. In that case, the sales order number is kept as the linked document, but the link with the line number is lost.



# Open and calculate the trading board from transfer order header

Article • 4/3/2023 • 1 min read

To open and calculate the trading board from a transfer order header:

1. Go to the required transfer order.
2. On the action bar, select **Actions > Functions > Open and Calculate Trading Board**. Alternatively, you can use **Alt+W**.

The Trading Board Filter request page opens with the Location and Availability To fields populated based on the transfer order. The Location field is automatically filled from the corresponding **Transfer-from Code** field on the transfer order header. The Availability To field is automatically filled from the shipment date on the transfer order.

## Note

You can change the values of the **Location**, and **Availability To** fields, and add additional filters with values on the **Trading Board Filter** request page.

Subsequently, you can use the Assign actions to assign the trading board entries that have quantities to the lines of the linked transfer order. For more information, see [Assign actions](#).



# Open and calculate the trading board from transfer order lines

Article • 4/3/2023 • 2 min read

You can quickly access the trading board from a transfer order line to see the availability of the specific item, taking into consideration the registered global lot attributes and location as registered on the transfer line. This enables you to update the transfer order line whenever required.

To open and calculate trading board from transfer order line:

1. Go to the required transfer order.
2. Select the transfer order line.
3. On the **Lines** FastTab, select **Functions > Open and Calculate Trading Board**. Alternatively, you can use **Ctrl+Alt+W**.

The trading board calculates the availability of the item based on the values of the document line.

## Note

You cannot calculate the trading board from the transfer order line when the transfer order is in Released state, when warehouse documents (warehouse pick, inventory pick) exist or when registered warehouse documents exist.

4. On the **Entries** FastTab, in the **Quantity** field, enter the number of items you want to transfer.

## Note

The value should not exceed the available quantity.

5. Use the **Assign** actions to assign the trading board entries that have quantities to the line of the linked transfer order. For more information, see [Assign actions](#). When multiple lot numbers are selected, all the quantities will be added on the same transfer order line.

When you select the trading board entry, the **Linked Document** FactBox displays the information from the linked transfer order including the transfer order number and line number.

## Note

If you use the **Calculate** function from the **Trading Board** page, the recently used transfer order number is kept as the linked document, but the link with the line number is lost.



# Open and calculate the trading board from production order lines

Article • 4/3/2023 • 1 min read

You can open the trading board from a production order line which enables you to add component lines to it.

To open the trading board from the production order line:

1. Go to the required production order.
2. Select the production order line.
3. On the **Lines** FastTab, select **Functions > Open and Calculate Trading Board** to open the **Trading Board** page.

The **Trading Board Filter** request page opens with the **Location** and **Availability To** fields populated based on the production order. The **Location** field is automatically filled with the location from the production order line and the **Availability To** field is automatically filled from the starting date from the production order line.

## Note

You can change the values of the **Location**, and **Availability To** fields, and add additional filters with values on the **Trading Board Filter** request page. Use the assign actions to assign the trading board entries that have quantities to the line of the linked document. For more information, see [Assign actions](#). The FactBox now displays the linked production order number and line number when you select the trading board entry.



# Open and calculate trading board from the production order component lines

Article • 4/3/2023 • 1 min read

You can open the trading board directly from the Planned, Firm planned and Released Production Order component line. The component lines will be created based on the BOM setup after refreshing the production order using the **Refresh Production Order** function.

To open and calculate trading board from the production order component line:

1. Go to the required **Released Production Order**.
2. On the **Lines** FastTab, select the required item.
3. On the action bar, select **Line > Components**.
4. Select the component line and select **Actions > Functions > Open and Calculate Trading Board**. Alternatively, select **Ctrl+Alt+W**.

## Note

This function is not available if the remaining quantity on the component line is less than the expected quantity. Also, it's not available when warehouse documents (warehouse pick, inventory pick) exist or when registered warehouse documents exist. Subsequently, you can use the Assign actions to assign the trading board entries that have quantities to the lines of the linked production order component line and add reservation entries. For more information, see [Assign actions](#).



# Open and calculate the trading board from assembly order header

Article • 12/4/2024 • 1 min read

You can access the trading board from the assembly order header to view the availability of items based on the location and global lot attributes specified.

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

1. Open the relevant **Assembly Order** page.
2. On the action bar, select **Actions > Functions > Trading Board > Open and Calculate**.  
Alternatively, select the Alt + W keyboard shortcut.

The **Trading Board Filter** page opens, with the **Location**, **Availability To**, and **Profile No.** fields populated based on the sales order.

3. You can change the values of the **Location**, **Availability To**, and **Profile No.** fields, and add additional filters on the **Trading Board Filter** page.
4. Select **OK**.

The trading board entries are displayed on the **Entries** FastTab of the **Trading Board** page.

Subsequently, you can use the **Assign** action to assign the trading board entries that have quantities to the lines of the linked assembly order. For more information, see [Assign quantities to linked documents](#).



# Open and calculate the trading board from assembly order lines

Article • 12/4/2024 • 2 min read

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

Ensure that the **Consumed Quantity** field value of the assembly order line is set to *0* and the **Status** field on the assembly order header is not updated to *Released*.

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

1. Open the relevant **Assembly Order** page.
2. On the **Lines** FastTab, select the assembly order line,
3. On the action bar, select **Functions > Open and Calculate Trading Board**.

The **Trading Board** page opens, and the system calculates the availability of the item based on the values in the assembly order line.

This action cannot be selected if the remaining quantity on the buffer order line is less than the expected quantity. Additionally, it is unavailable when warehouse documents (warehouse pick, inventory pick) exist or when registered warehouse documents exist.

4. On the **Entries** FastTab, in the **Quantity** field, enter the number of items to assemble.

This value cannot exceed the **Available Quantity** field value.

5. Use the assign actions to assign the trading board entries with quantities to the line of the linked assembly order. For more information, see [Assign quantities to linked documents](#).

The assembly order lines are updated with the item quantities. If multiple lot numbers are selected, all the quantities will be added to the same assembly order line.

## Note

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



# Assign quantities to linked documents

Article • 12/4/2024 • 2 min read

After linking a document 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 document. The allocated lots are also copied to the sales, transfer, production, or assembly order lines.

Ensure that you have linked the trading board to a document.

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 document.
Assign & Release	Assign the quantities entered on the trading board entries to the lines of the linked document and release it.
Assign & Close	Assign the quantities entered on the trading board entries to the lines of the linked document and close the trading board.
Assign, Release & Close	Assign the quantities entered on the trading board entries to the lines of the linked document, release it, 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.
- If the **Combine Lots** field value on the **Trading Board Setup** page is set to *Try to Combine*, the system combines the trading board lines by item number, location code, trading unit of measure code, unit price, and global lot attributes when assigned to an outbound document. For more information, see [Set up the trading board](#).



# Calculate the trading board and assign lots by FIFO automatically from documents

Article • 4/12/2024 • 1 min read

You can calculate the trading board and assign lots by FIFO automatically from sales orders, sales order lines, transfer orders, and transfer order lines. The date on which the lot is assigned depends on the **Assign FIFO** field value of the **Trading Board Setup** page. For more information, see [Set up the trading board](#).

 **Note**

You cannot assign lots by FIFO automatically for partial quantity.

To calculate the trading board and assign lots by FIFO,

- On the **Sales Order** or **Transfer Order** page, on the action bar, select **Actions > Functions > Trading Board > Calculate and Assign by FIFO**.  
The **Trading Board** page opens with the lots assigned.

You can make changes to the lot assignment if required and use the **Assign** action to assign the trading board entries that have quantities to the lines of the linked sales or transfer order. For more information, see [Assign quantities to linked documents](#).



# Understand information stored on the lot level

Article • 4/3/2023 • 1 min read

The trading board requires swift calculation and visibility of various lot number characteristics. As a result, some fields were added to the lot level. Hence, the user has more information while working with the trading board.

## Lot attribute values on lot level

In purchase and sales return order documents, all the global lot attribute value ID's are copied from the document line to the Lot No. Information table. These values were already available to the user via the Aptean Advanced Attributes extension but were stored in a different table. To ensure the performance of the trading board, the lot attribute values are now stored directly on the lot level.

## Vendor Information on lot level

On assigning a lot number in a purchase order/quote/invoice, the value in the **Vendor No.** field is copied from the purchase document to the **Source No.** field on the Lot No. Information table. Upon creating a sub lot from the original lot, the **Source No.** is copied from the original lot to the Lot No. Information table.

Similarly, the purchase order number is copied from the purchase document to the **Source Document No.** field on the Lot No. Information table.



# Manage the reuse of lot numbers in incoming documents

Article • 10/22/2025 • 2 min read

You cannot reuse existing lot numbers in incoming transactions. This rule applies to incoming documents, such as purchase orders and sales return orders, but also less common incoming transactions like sales orders with a negative quantity.

Instead, you must create new lot numbers by using the Business Central functionality for assigning lot numbers during inbound transactions. For more information, see [To assign serial or lot numbers during an inbound transaction](#). This check ensures accurate tracking and traceability.

This rule does not apply in the following conditions:

- Consumption journal lines with a negative value in the **Quantity** field on the **Consumption Journals** page. This implies that the system allows the reuse of lot numbers for all types of consumption posting.
- Positive adjustment item journal lines with the **Entry Type** field value set as *Positive Adjmt.* and a positive value in the **Quantity** field on the **Item Journals** page. This implies that the system allows the reuse of lot numbers for all positive corrections.
- Negative adjustment item journal lines with the **Entry Type** field value set as *Negative Adjmt.* and a negative value in the **Quantity** field on the **Item Journals** page. This implies that the system allows the reuse of lot numbers for all negative corrections.



# Integrations

Article • 11/20/2024 • 1 min read

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

- [Aptean Advanced Pricing](#)
- [Aptean Buffer Orders](#)



# Aptean Advanced Pricing

Article • 4/3/2023 • 2 min read

In case the [Aptean Advanced Pricing](#) extension is installed and the customer is set with the Price calculation Method as *Advanced Pricing*, it is no longer possible to manually overrule the unit price on a sales line. The user has to execute the **Manual Price** function on the **Applied Sales Price and Discount** page to overrule a price retrieved from the pricing table. Once done, the unit price is flagged as *Frozen*. This functionality is integrated into the trading board.

When the trading board is used to create a sales line for a customer set with the price calculation method as *Advanced Pricing* and the trading board pricing strategy is set with the option *Manual*, the system will apply the manual price and flag the **Frozen** toggle on the sales line just as when a user would do this manually. In case the trading board is reopened for the specific sales line (also see [Pricing on the Trading Board](#)), the **Frozen** toggle is also turned on in the trading board to indicate that the price cannot be changed. In case a new price has to be registered, the user must first unfreeze the sales price (once again via the **Applied Sales Price and Discounts** page) before it can be updated via the trading board.



# Aptean Buffer Orders

Article • 12/23/2024 • 1 min read

When the Aptean Trading Board extension is used in conjunction with the Aptean [Buffer Orders](#) 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](#).

Additionally, you can view the **Qty. on Buffer Order (Base)** field on the **Trading Board** page to view how many units of an 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. For more information, see [Use the trading board](#).



# Error handling in the trading board

Article • 4/3/2023 • 1 min read

An error may occur when the sales line is created from the trading board using any of the Assign functions. These errors can come from Business Central, Trading Board extension or other extensions that are associated with the Trading Board extension. A good example would be the allocation of a lot number with an inspection status unfit for sales. When trying to assign the lot number in the tracking line of a sales order manually, an error is presented to the user. Trading board users do not have visibility of the sales or tracking line while assigning but can still encounter problem/error.

To indicate that issues were encountered while assigning the trading board line to a sales line, the **Error** checkbox is visible on the trading board. For trading board lines that could not be converted into sales lines, the **Error** checkbox is selected, and the **Error text** field (in the *Advanced* view of the page) displays a brief description of the issue encountered.



# Keyboard Shortcuts

Article • 4/3/2023 • 2 min read

This image provides an overview of the shortcut key combinations that you can use when you're working with Trading Board.

