AP Commerce Inc.

Container Management

Table of Contents

Installation & Setup

The Container Management app is installed per company. To enable and initialize the app, use the Assisted Setup Wizard.

Setup the Container Management App

1. Choose the 🔎 icon that opens the **Tell Me** feature, enter **"User"** and click on the related link to open the **Users** list.
2. On the Users list, click on the user that will perform the Container Management setup and open the User Card page.
3. On the **User Card** page, go to the **User Permission Sets** tab, add the **Container Management** permission set for this user.

4. Go back to the Home Page, click the **Setup & Extensions** dropdown

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menu.

5. Click the **Assisted Setup**.

6. Click the **Set up Container Management** link.

7. This will launch the wizard for setup process.

8. On the **Customer Details** page, customer information will default to the current company information.

9. Review and modify customer information if needed.

10. Click **Next.**

11. On the **Number Series** step, select a **No. Series** for **Container Nos.** and **Posted Container Nos.** If left blank, a **No. Series** of **"P-CON"** and **"P-CON+"** will be created and inserted into the No. Series fields by the setup wizard.

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CONTAINER MANAGEMENT SETUP WIZARD ↗ ✕

⚙

NUMBER SERIES

Please choose No. Series for Container No. Leaving it empty will create default No.
Series.

Container Nos. · · · · · · · · · · · · · · · P-CON ⌄

Posted Container Nos. · · · · · · · · · · · P-CON+ ⌄

Back   **Next**   Finish

12. Click **Next**.
13. On **All Done** page, Click **Finish** to complete setup.

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CONTAINER MANAGEMENT SETUP WIZARD

↗ ✕

✓

ALL DONE

Click on Finish to initialize the app. Thank you for choosing the Container app!

Back   Next   **Finish**

14. After setup wizard is closed, a confirmation window will pop up to connect to the external service Stripe.com for subscription synchronization. Please choose **Allow Always** and then click **OK**.

CONTAINER MANAGEMENT SETUP WIZARD

✓

ALL DONE

Click on Finish to initialize the app. Thank you for choosing the Container app!

ⓘ The extension 'Container Management by AP Commerce' is making a request to an external service. Do you want to allow this request?

◉ Allow Always

◯ Allow Once

◯ Block Always

◯ Block Once

OK   Cancel
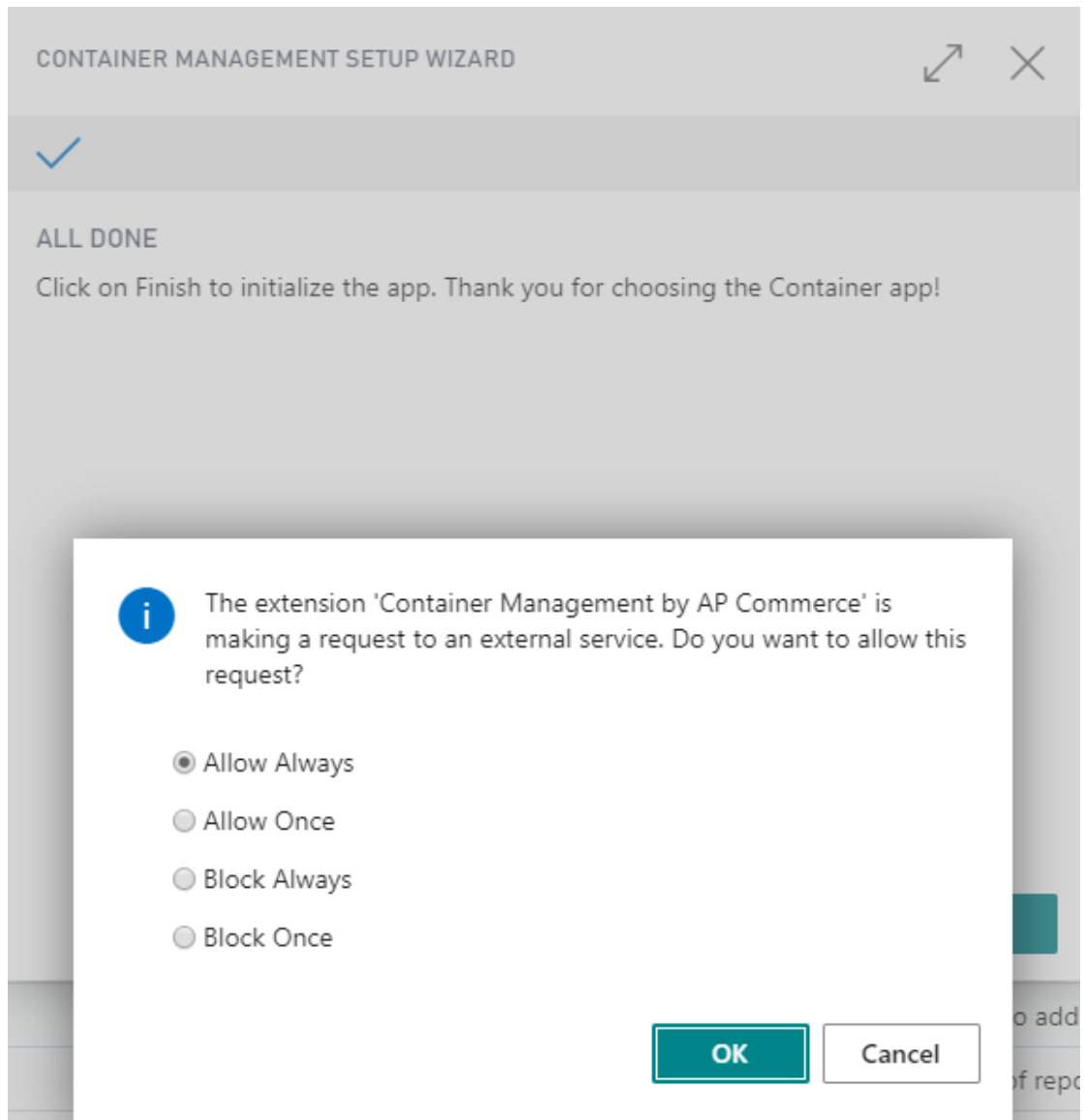
Modify the Container Management Setup

1. Choose the 🔎 icon that opens the **Tell Me** feature, enter "container setup". Select the **Container Management Setup** link to open the setup page.

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TELL ME WHAT YOU WANT TO DO

Container Management

Go to Pages and Tasks

> Container Management Setup   Administration

> Container Management Subscription Setup   Administration

Didn't find what you were looking for? Try exploring

2. On the **Container Management Setup** page, users may change Container Nos./Posted Container Nos. if needed.

← CONTAINER MANAGEMENT SETUP   ✎   +   🗑   ✓SAVED

0

Number Series

Container Nos. · · · · · · · P-CON   Posted Container Nos. · · · P-CON+

Setup the Container Management Subscription

1. Choose the 🔍 icon that opens the **Tell Me** feature, enter "container setup". Select the **Container Management Subscription Setup** link to open the setup page.

TELL ME WHAT YOU WANT TO DO

Container Manage

Go to Pages and Tasks

> Container Management Setup   Administration

> Container Management Subscription Setup   Administration

Didn't find what you were looking for? Try exploring

2. The **Container Management Subscription Setup** contains two fast tabs:

General

Users may modify contact/subscription information in the **General**

tab.

Subscription Info

This section will show subscription status and subscription period information. These fields will be automatically updated by app provider.

Subscription

Subscription Status

On **Container Management Subscription Setup** page, Subscription Info section, subscription Status field has the following values:

- **Evaluation**: This means the app is in a trial period. The Container Management app has a 15-day trial period. The period starts counting the day the app has been installed.
- **Active**: This means the app is authorized for use in the current company. Your subscription is within the effective period. The Container Management app can be subscribed to yearly. The status will change to **Active** after payment has been received. The "Current Period Start/Current Period End" fields will be automatically renewed to 1- year period after payment has been verified.
- **Past Due**: This means the app is not within a valid period. Once the trial period has expired, and no subscription has been created or the

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payment has failed after processing, the app function will be blocked, and the **Status** value will be changed to **Past Due**.

- **Canceled**: This means the app was subscribed using card payment, but the subscription has been canceled manually by the users. The **Status** value will be changed to **Canceled** at the end of the current effective period. Users can create a subscription again per the above instructions on how to use the app.
- **Unpaid**: This means the payment renewal has failed. The app function will be blocked, and the **Status** will change to **Unpaid**.
- **Blocked**: When new companies are created through copy company function, the Container Management app will be automatically installed, and **Status** will be set to **Blocked**. Users must run **Set up Container Management** from **Assisted Setup** to register the current company as a new customer before starting use.

When the trial period has ended, **Status** will be changed from **Evaluation** to **Active** temporarily for users to process their payment. If the payment has not been made within a couple of hours, then the **Status** will be changed to **Past Due**.

Create subscription by credit card payment

1. Choose the 🔍 icon that opens the **Tell Me** feature, enter "container setup", select the **Container Management Subscription Setup** link to open the setup page.
2. On **Container Management Setup** page, click the **Actions** dropdown menu.

← ✎ + 🗑 ✓ SAVED 🔖 ⧉ ⤢

Container Management Subscription Setup

> ✕ Thank you for trying out the Container Management app. Your trial period expires in 1 day(s). You have to create subscription after trial period expired. ∧

Actions

▭ Create Subscription   📇 Create Subscription Manually   ✕ Cancel Subscription   ⚓

General

Name	APC Test	Post Code	W2 8HG
Address	5 The Ring	Country/Region Code	GB
Address 2	Westminster	Phone No.	0666-666-6666
City	London	Email	red@apcommerce.com
County			

Subscription Info

Status	Evaluation	Current Period Start	2/27/2020 12:10 AM
Last Synchronized	2/27/2020 12:16 AM	Current Period End	2/28/2020 12:10 AM

3. Click **Create Subscription** to launch the wizard for this process.

CREATE SUBSCRIPTION TO CONTAINER

CUSTOMER DETAILS

Provide your company details

|	
Name	APC Test
Address	5 The Ring
Address 2	Westminster
City	London
County	
Post Code	W2 8HG
Country/Region Code	GB
Phone No.	0666-666-6666
Email	red@apcommerce.com

Back   **Next**   Finish

4. The wizard will automatically import the data from the Company Information. You can modify or confirm the payment information, and then click **Next**.

5. Enter **Credit Card information**. Please enter card number, expiration month/year, and CVC code.

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CREATE SUBSCRIPTION TO CONTAINER

⚙
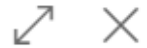
CREDIT CARD DETAILS

Please fill in your credit card details below. Your credit card will be charged $179 USD yearly at every period start. They will be safely stored with our payment provider Stripe. No credit card information will be stored in Microsoft Dynamics 365 Business Central.

4242 4242 4242 4242   12 / 25 666

Back   **Next**   Finish

6. Click **Next**.
7. Click **Finish** to create the subscription and close the wizard.

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CREATE SUBSCRIPTION TO CONTAINER ⤢ ✕

✓

ALL DONE

Click on Finish to create your subscription. Thank you for choosing the Container app!

| Back | Next | Finish |

8. The **Container Management Subscription Setup** page will be updated with the renewed subscription message. The subscription status will automatically update when current period ends.

Container Management Subscription Setup

✕ Thank you for subscription to the Container Management app. Your subscription will be charged and start automatically after trial period expired.

Actions

⬚ Create Subscription   ⬚ Create Subscription Manually   ✕ Cancel Subscription

General

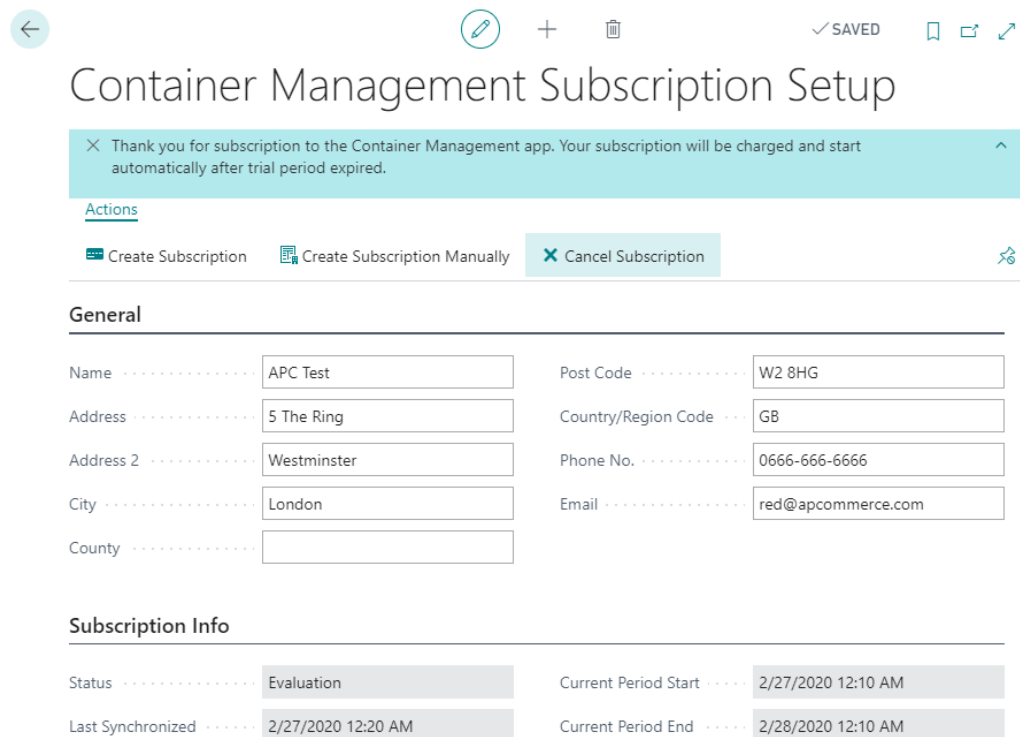|			
Name	APC Test	Post Code	W2 8HG
Address	5 The Ring	Country/Region Code	GB
Address 2	Westminster	Phone No.	0666-666-6666
City	London	Email	red@apcommerce.com
County			

Subscription Info

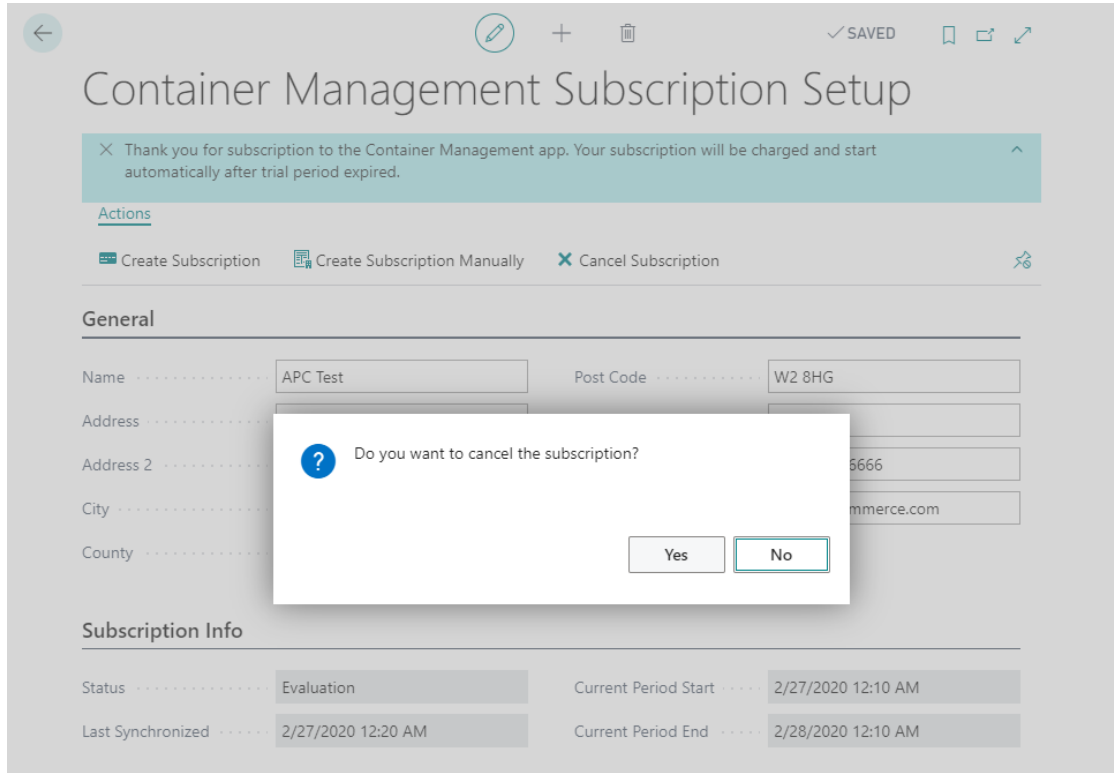|			
Status	Evaluation	Current Period Start	2/27/2020 12:10 AM
Last Synchronized	2/27/2020 12:20 AM	Current Period End	2/28/2020 12:10 AM

Create subscription manually

1. On Container **Management Subscription Setup** page, click the **Action** dropdown menu.
2. Click **Create Subscription Manually**.

Container Management Subscription Setup

✕ Thank you for trying out the Container Management app. Your trial period expires in 1 day(s). You have to create subscription after trial period expired.

Actions

⬚ Create Subscription   ⬚ Create Subscription Manually   ✕ Cancel Subscription

General

Name	APC Test	Post Code	W2 8HG
Address	5 The Ring	Country/Region Code	GB
Address 2	Westminster	Phone No.	0666-666-6666
City	London	Email	red@apcommerce.com
County			

Subscription Info

Status	Evaluation	Current Period Start	2/27/2020 12:10 AM
Last Synchronized	2/27/2020 12:22 AM	Current Period End	2/28/2020 12:10 AM

3. A new page will be open with browser that links to http://www.apcommerce.com/contact-us/. Please enter contact information and app name in the **"Write a Message"** text box then clicks **Submit**. After processing has been completed, the applicant will receive an invoice through e-mail from AP Commerce Inc.

4. After payment has been remitted on the invoice, the subscription will be automatically activated, and the **Status** on the **Container Management Subscription Setup** page will be changed into **Active**.

Cancel the subscription if using card payment

1. On the **Container Management Subscription Setup** page, click the **Actions** dropdown menu.

2. Click **Cancel Subscription.**

3. Click **Yes** when confirmation window popups.

4. After canceling the process, the subscription **Status** will stay **Active/Evaluation** till the current subscription period has ended. When the user opens the **Container Management Subscription Setup** page, users will have a warning message on the header of the page to remind them that the subscription has been canceled. The **Status** on the setup page will change to **Canceled** after the current subscription has ended.

← ✎ + 🗑 ✓SAVED 🔖 ⬈ ↗

Container Management Subscription Setup

✕ Thank you for subscription to the Container Management app. Your subscription will be charged and start automatically after trial period expired. ⌃

Actions

⌨ Create Subscription   📇 Create Subscription Manually   ✕ Cancel Subscription   ⚐

General

Name	APC Test	Post Code	W2 8HG
Address			
Address 2			6666
City			mmerce.com
County			

> ⓘ   Subscription will be cancelled after current period end.
>
>   **OK**

Subscription Info

Status	Evaluation	Current Period Start	2/27/2020 12:10 AM
Last Synchronized	2/27/2020 12:20 AM	Current Period End	2/28/2020 12:10 AM

← ✎ + 🗑 ✓SAVED 🔖 ⬈ ↗

Container Management Subscription Setup

✕ Thank you for trying out the Container Management app. Your trial period expires in 1 day(s). You have to create subscription after trial period expired. ⌃

Actions

⌨ Create Subscription   📇 Create Subscription Manually   ✕ Cancel Subscription   ⚐

General

Name	APC Test	Post Code	W2 8HG
Address	5 The Ring	Country/Region Code	GB
Address 2	Westminster	Phone No.	0666-666-6666
City	London	Email	red@apcommerce.com
County			

Subscription Info

Status	Evaluation	Current Period Start	2/27/2020 12:10 AM
Last Synchronized	2/27/2020 12:22 AM	Current Period End	2/28/2020 12:10 AM

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User Scenarios

Vendors may ship multiple orders within a container, and the same item might be included in more than one orders. To management receiving items for above scenario, user needs to open each purchase order separately to complete receiving process, which is time consuming and ineffectiveness. This app is built to help Business Central users managing container information and receiving items for multiple orders in one worksheet. ※Appendix A is the instruction about "How to create purchase order".

Below are the key functions for this app:

Receive container

1. Choose the 🔍 icon that opens the **Tell Me** feature, enter "container", and then choose the **Containers** link to open the container list page.
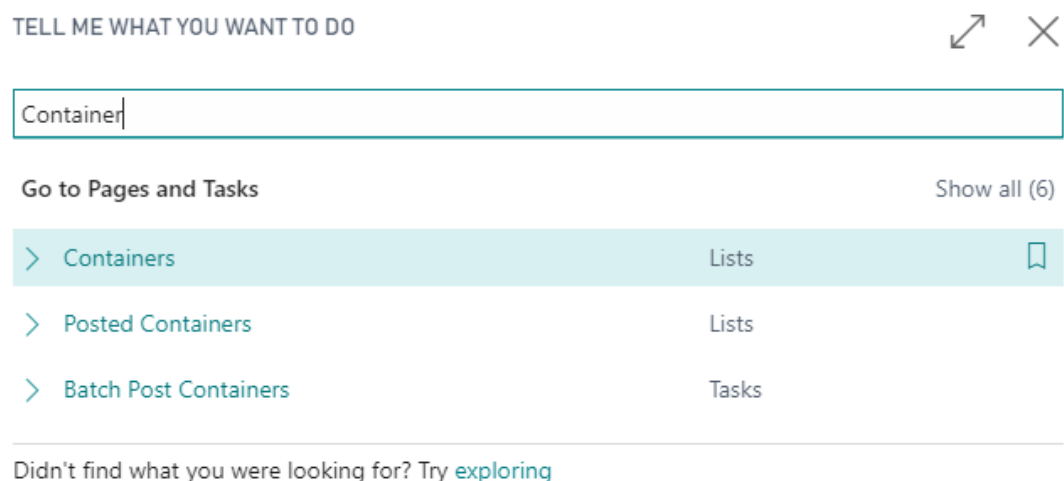
2. Click **New** to create a container document.
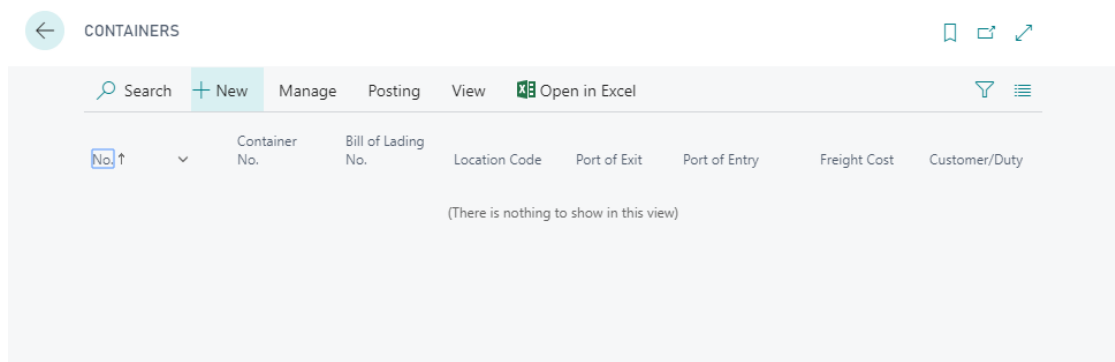
3. The **Container** card page contains two fast tabs:
   General

Users may fill container information in the **General** tab.

Fields with asterisk sign are mandatory.

Line

This section allows users to input the items to be received in the container, or import items from the purchase line. Please notice only **Items** can be manage in this worksheet, Resources or G/L accounts are not supported in this app.

4. Use **Get Purchase Lines** to import data into **Line** section.

5. User can select multi-rows at one time. Click on the assist dropdown menu, then click **Select More**.

	Document No. ↑		Line No. ↑	Type ▼	No.	Description	Unit of Measure Code	Location Code	Quantity	Quantity Received	Outstanding Quantity ▼
✓	PO00002	⋮	10000	Item	1896-S	ATHENS Desk	PCS	MAIN	50	0	50
✓	PO00002		20000	Item	1900-S	PARIS Guest Chair, black	PCS	MAIN	100	0	100
○	PO00002		30000	Item	1906-S	ATHENS Mobile Pedestal	PCS	MAIN	200	0	200
✓	PO00003		10000	Item	1908-S	Blue armless swivel chair	PCS	MAIN	300	0	300
→ ✓	PO00003	⋮	20000	Item	1920-S	ANTWERP Conference Table	PCS	MAIN	350	0	350
○	PO00003		30000	Item	1925-W	Conference Bundle 1-6	PCS	MAIN	400	0	400

OK   Cancel

6. Click **OK**.

← CONTAINER   ✓ SAVED

CON000001

📄 Post Container   🔍 Get Purchase Lines

General

Container No.	APCCON00001	Port of Entry	
Bill of Lading No.	APCCON0001	Freight Cost	0
Expected Receipt Date	2/27/2020	Customer/Duty	0
Location Code	MAIN	Posting Date	2/27/2020
Port of Exit		Document Date	2/27/2020

Lines | Manage

📄 New Line   ✖ Delete Line   📄 View Document

	Source No.	No.	Description	Unit of Measure Code	Original Quantity	Outstanding Quantity
	PO00002	1896-S	ATHENS Desk	PCS	50	50
	PO00002	1900-S	PARIS Guest Chair, black	PCS	100	100
→	PO00003 ⋮	1908-S	Blue armless swivel chair	PCS	300	300
	PO00003	1920-S	ANTWERP Conference Table	PCS	350	350

7. Click **Manage** dropdown menu on the line section, then click **View Document** to navigate the source purchase order.

Lines | Manage

📄 New Line   ✖ Delete Line   📄 View Document

	Source No.	Source Line No.	No.	Description	Unit of Measure Code	Original Quantity
	PO00002		10000	1896-S	ATHENS Desk	PCS	50
	PO00002		20000	1900-S	PARIS Guest Chair, black	PCS	100
→	PO00003 ⋮		10000	1908-S	Blue armless swivel chair	PCS	300
	PO00003		20000	1920-S	ANTWERP Conference Table	PCS	350

8. On the line section, the "Original Quantity" will display the quantity on the purchase order. Users can do **Partial receive** or **Over receive** by entering less or more quantity on the "Qty. to Receive" fields.

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Source No.		No.	Description	Unit of Measure Code	Original Quantity	Outstanding Quantity	Qty. to Receive ⌄	Warehouse Outstanding Quantity
PO00002		1896-S	ATHENS Desk	PCS	50	50	0	0.00
PO00002		1900-S	PARIS Guest Chair, black	PCS	100	100	0	0.00
→ PO00003	⋮	1908-S	Blue armless swivel chair	PCS	300	300	0	0.00
PO00003		1920-S	ANTWERP Conference Table	PCS	350	350	0	0.00

Post & Batch Post

Post Single Container Document

Post container will update Qty. to Receive on the purchase order lines and post receipt simultaneously.

Users can use the button **"Post Container"** on the container card page and container list page to execute posting.

CONTAINERS

🔍 Search   ＋ New   Manage   Posting   View   ☒ Open in Excel

📋 Post   📋 Post Batch...

No. ↑		Container No.	Bill of Lading No.	Location Code	Port of Exit	Port of Entry	Freight Cost	Customer/Duty
CON000001	⋮	APCCON00...	APCCON0001	MAIN			0	0

CONTAINER   ✓ SAVED

CON000001

📋 Post Container   🔍 Get Purchase Lines

General

Container No. · · · · · · · ·	APCCON00001	Port of Entry · · · · · · · ·	
Bill of Lading No. · · · · · ·	APCCON0001	Freight Cost · · · · · · · ·	0
Expected Receipt Date · ·	2/27/2020	Customer/Duty · · · · · · ·	0
Location Code · · · · · · · ·	MAIN	Posting Date · · · · · · · · ·	2/27/2020
Port of Exit · · · · · · · ·		Document Date · · · · · · ·	2/27/2020

Lines   Manage

➕ New Line   ✖ Delete Line   📄 View Document

Source No.		No.	Description	Unit of Measure Code	Original Quantity	Outstanding Quantity
→ PO00002	⋮	1896-S	ATHENS Desk	PCS	50	50
PO00002		1900-S	PARIS Guest Chair, black	PCS	100	100
PO00003		1908-S	Blue armless swivel chair	PCS	300	300
PO00003		1920-S	ANTWERP Conference Table	PCS	350	350

Post partial receive

For example, on Container card CON000001, enter basic information on the General section.

To do the partial receive, assign Qty. to Receive less than Original Quantity, as the first two lines on the screenshot (PO00002, Item 1896-S & 1900-S).

Post over receive

To do the over receive, assign Qty. to Receive more than Original Quantity, as the last two lines on the screenshot (PO00003, Item 1908-S & 1920-S).

Update purchase documents

On the purchase order, the Qty. to Receive by default will equal to the Quantity value. When posting receive from the purchase order, the Qty. to Receive will be restricted to be equal or less than Quantity value.

When posting receive from the Container documents, if Container documents have over received lines, the Container function will update the Quantity on the Purchase Order after posting.

Below example displaying when post receive from the Container documents,

the Quantity Received on the Purchase Orders will be updated to be consistent with the Received Qty. in the Posted Container Lines.

Take below example, Item 1908-S on purchase order PO00003 has Quantity equals 300, after posting container CON000001, the Quantity changed from 300 to 350. On the same purchase order, Item 1920-S has changed from 350 to 400.

PO00003 has Qty. to Receive = 300 for Item 1908-S and Qty. to Receive = 350 for Item 1920-S.

Post Received Qty. = 350 for Item 1908-S and Received Qty. = 400 for Item 1920-S on the Container document.

The Item 1908-S on PO00003 has been updated with Quantity & Quantity Received = 350. The Item 1920-S has been updated with Quantity & Quantity Received = 400.

Batch Post on multiple Container documents

Use **"Batch Post..."** to do the batch posting. Click on **"Post Batch..."** button on the container list page or execute it directly by choosing the **"Batch Receive Containers"** link in the Tell Me feature.

Posted Container

1. Choose the 🔍 icon that opens the **Tell Me** feature, enter "Posted Containers", and then choose the **Posted Containers** link to open the container list page.

2. Select a Posted Container Number.

3.Press **"View Purchase Receipts"** on the List/Card page to open related **"Posted Purchase Receipts"**.

← POSTED CONTAINER   ✏️ + 🗑️   ⬈ ˌ

PCON000001

View

📤 View Purchase Receips

General

No.	PCON000001	Port of Entry	
Container No.	APCCON00001	Freight Cost	0
Bill of Lading No.	APCCON0001	Customer/Duty	0
Expected Receipt Date	2/27/2020	Container Doc. No.	CON000001
Location Code	MAIN	Posting Date	2/27/2020
Port of Exit		Document Date	2/27/2020

Lines

Source No.		Source Line No.	No.	Description	Unit of Measure Code	Origin Quantity	Outstanding Quantity	Received Qty.	Purch. Rcpt. No.
→ PO00002	⋮	10000	1896-S	ATHENS Desk	PCS	50	50	10	PRCT00002
PO00002		20000	1900-S	PARIS Guest Chair, black	PCS	100	100	20	PRCT00002
PO00003		10000	1908-S	Blue armless swivel chair	PCS	300	300	350	PRCT00003
PO00003		20000	1920-S	ANTWERP Conference Table	PCS	350	350	400	PRCT00003

← POSTED PURCHASE RECEIPTS

🔍 Search   Manage   Print/Send   Receipt   📊 Open in Excel | More options

No.	Buy-from Vendor No.	Buy-from Vendor Name	Location Code	No. Printed	Container No. ▼	Container Doc. No. ▼
PRCT00003	30000	Graphic Design Institute	MAIN	0	APCCON00001	CON000001
PRCT00002	30000	Graphic Design Institute	MAIN	0	APCCON00001	CON000001

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Appendix

Appendix A: How to create purchase order.

Choose the 🔎 icon that opens the **Tell Me** feature, enter "Purchase Orders", and then choose the **Purchase Orders** link to open the purchase order list page.

Click "New" on the list page tool bar, to create new order.

Make sure the fields with start sign be filled properly.

PURCHASE ORDER

PO00001

Process   Release   Posting   Order   Request Approval   Print/Send   Navigate | More options

General   Show less

Vendor No.		Due Date	
Vendor Name ✱		Vendor Invoice No. ✱	
BUY-FROM		Purchaser Code	
Address		No. of Archived Versions	0
Address 2		Order Date	3/8/2020
City		Quote No.	
Post Code		Vendor Order No.	
Country/Region		Vendor Shipment No.	
Contact No.		Alternate Vendor Address Co...	
Contact		Responsibility Center	
Document Date	3/8/2020	Assigned User ID	
Posting Date	3/8/2020	Status	Open

Since the function is use to receive the items from the container.

In purchase line, select "Item" from the type option values.

Also, make sure the field wit start sign be filled properly.

Lines   Manage   More options

Type		No.	Description	Location Code	Bi
→ Item ∨		✱			

Option Values

Comment

G/L Account

→ **Item**

Fixed Asset

Charge (Item)

Select from full list

Sub ...   al Excl. VAT (

Lines   Manage   More options

Type	No.	Description	Location Code	Bin Code	Quantity	Reserved Quantity	Unit of Measure Code
→ Item	1896-S	ATHENS Desk			✱ 50		PCS