

# Container Management


## Table of Contents

Installation & Setup.....	2
Setup the Container Management App.....	2
Modify the Container Management Setup.....	6
Setup the Container Management Subscription .....	7
Subscription .....	8
Create subscription by credit card payment.....	9
Create subscription manually .....	14
Cancel the subscription if using card payment .....	15
User Scenarios .....	18
Receive container.....	18
Post & Batch Post .....	21
Posted Container.....	24
Appendix.....	27
Appendix A: How to create purchase order. ....	27

# 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.

PERMISSION SET LOOKUP

Role ID ↑	Name	Extension Name	Scope ↑
D365PREM MFG. EDIT	Dyn. 365 Create manufacturing		System
D365PREM MFG. VIEW	Dyn. 365 View manufacturing		System
D365PREM SMG. EDIT	D365 Service Management Edit		System
D365PREM SMG. SETUP	D365 Service Management Setup		System
D365PREM SMG. VIEW	D365 Service Management View		System
INTELLIGENT CLOUD	D365 Intelligent Cloud		System
MERGE DUPLICATES	D365 Merge Duplicates		System
SECURITY	Dynamics 365 User setup		System
SUPER	This role has all permissions.		System
TEST TOOL	Test Tool		System
TROUBLESHOOT TOOLS	Troubleshoot Tools		System
INTELLIGENTCLOUDBASE	Intelligent Cloud Base	Intelligent Cloud Base	Tenant
MSWALLETSTANDARD	MSWallet Permissions	Microsoft Pay Payments	Tenant
LATE PAYMENT PREDICT	Late payment prediction	Late Payment Prediction	Tenant
PAYPALSTANDARD	PayPalStandard Permissions	PayPal Payments Standard	Tenant
PAYPALSTANDARDREAD	PayPalStandard Read Permission	PayPal Payments Standard	Tenant
ANONYM. DATA SHARER	Anonymous Data Sharer	_Exclude_AnonymizedDataSharing_	Tenant
INTELLIGENTCLOUDBC	Intelligent Cloud Business Cen	Business Central Intelligent Cloud	Tenant
→ CONTAINER MANAGEMENT	Container Management	Container Management	Tenant
ESSENTIALBUSINESSHEA	Essential Business Headlines	Essential Business Headlines	Tenant
SYNC BASE	Sync Base	_Exclude_SyncBaseApp_	Tenant
SALESANDINVENTORYFOR	Sales And Inventory Forecast	Sales and Inventory Forecast	Tenant

OK Cancel

User Card

Change Web Service Key Effective Permissions More options

Change Web Service Key Effective Permissions

Office 365 Authentication >

User Groups Manage

Code ↑	Name	Company Name ↑
→		APC Test

User Permission Sets Manage

New Line Delete Line Permissions

Permission Set ↑	Description	Company ↑	Extension Name	Permission Scope
CONTAINER MANAGEMENT	Container Management		Container Management	Tenant
SUPER	This role has all permissions.			System

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

menu.

5. Click the **Assisted Setup**.
6. Click the **Set up Container Management** link.

APC Test | Finance | Cash Management | Sales | Purchasing | **Setup & Extensions** | Intelligent Cloud Insights | ≡

Assisted Setup: All | Search | Open in Excel | More options

Name	Completed	Help	Video	Group	Translated Name
Set up Cloud Migration	<input type="checkbox"/>	—	—	Get started with Dynamics ...	Set up Cloud Migration
<b>Set up Container Management</b>	<input type="checkbox"/>	—	—	<b>Container App</b>	<b>Set up Container Management</b>
Set up my company	<input type="checkbox"/>	—	—	Get started with Dynamics ...	Set up my company
Set up approval workflows	<input type="checkbox"/>	—	Watch	Customize settings to fit y...	Set up approval workflows
Set up email	<input type="checkbox"/>	Read	Watch	Customize settings to fit y...	Set up email
Set up your Business Inbox in Outlook	<input type="checkbox"/>	Read	Watch	Customize settings to fit y...	Set up your Business Inbox in Outlook
Migrate business data	<input type="checkbox"/>	Read	Watch	Get started with Dynamics ...	Migrate business data
Set up email logging	<input type="checkbox"/>	—	Watch	Customize settings to fit y...	Set up email logging
Set up an item approval workflow	<input type="checkbox"/>	—	—	Install extensions to add fe...	Set up an item approval workflow
Set up a customer approval workflow	<input type="checkbox"/>	—	—	Customize settings to fit y...	Set up a customer approval workflow
Set up a payment approval workflow	<input type="checkbox"/>	—	—	Install extensions to add fe...	Set up a payment approval workflow
Set up Dynamics 365 Sales connection	<input type="checkbox"/>	—	Watch	Install extensions to add fe...	Set up Dynamics 365 Sales connection
Set up cash flow forecast	<input type="checkbox"/>	Read	—	Get the most out of report...	Set up cash flow forecast
Set up VAT	<input type="checkbox"/>	Read	—	Install extensions to add fe...	Set up VAT
Set up reporting data	<input type="checkbox"/>	—	—	Install extensions to add fe...	Set up reporting data
Invite External Accountant	<input type="checkbox"/>	—	—	Install extensions to add fe...	Invite External Accountant

7. This will launch the wizard for setup process.
8. On the **Customer Details** page, customer information will default to the current company information.

CONTAINER MANAGEMENT SETUP WIZARD

**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
Coupon Code	

Back Next Finish

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.

## 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.

## CONTAINER MANAGEMENT SETUP WIZARD

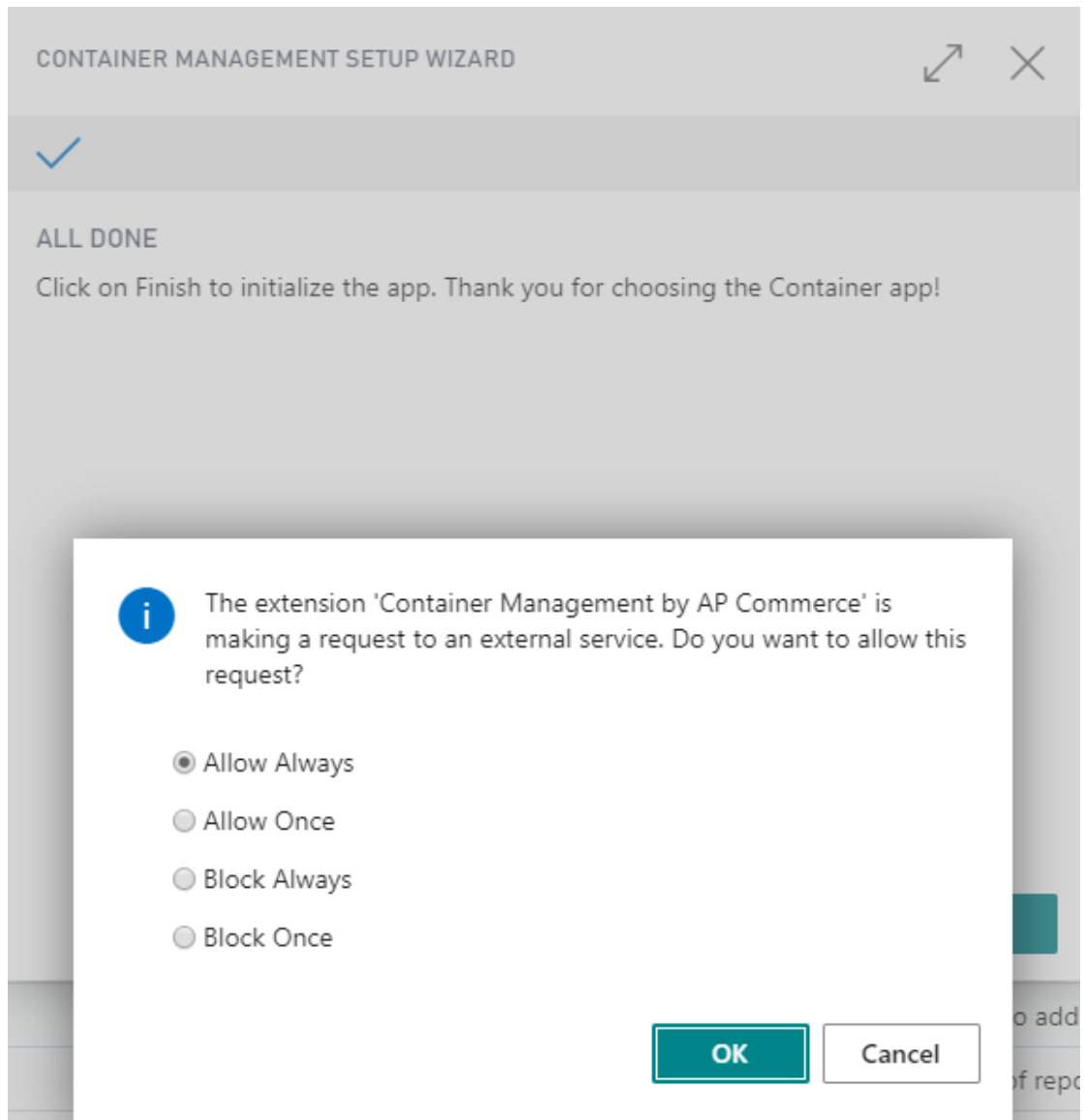


## ALL DONE


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**.



## 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.

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](#)



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

← CONTAINER MANAGEMENT SETUP  +  ✓ SAVED   


0

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Number Series

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

## Setup the Container Management Subscription

- 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](#)

- 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.

←
✎ + 🗑
✓ 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

---

#### 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

## 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




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 .....	<input type="text" value="APC Test"/>	Post Code .....	<input type="text" value="W2 8HG"/>
Address .....	<input type="text" value="5 The Ring"/>	Country/Region Code ...	<input type="text" value="GB"/>
Address 2 .....	<input type="text" value="Westminster"/>	Phone No. ....	<input type="text" value="0666-666-6666"/>
City .....	<input type="text" value="London"/>	Email .....	<input type="text" value="red@apcommerce.com"/>
County .....	<input type="text"/>		

### Subscription Info

Status .....	<input type="text" value="Evaluation"/>	Current Period Start .....	<input type="text" value="2/27/2020 12:10 AM"/>
Last Synchronized .....	<input type="text" value="2/27/2020 12:16 AM"/>	Current Period End .....	<input type="text" value="2/28/2020 12:10 AM"/>

- 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

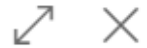
Next

Finish

- The wizard will automatically import the data from the Company Information. You can modify or confirm the payment information, and then click **Next**.
- Enter **Credit Card information**. Please enter card number, expiration month/year, and CVC code.



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.

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.





✓ 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

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### 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			








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### 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**.





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## 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

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### 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			

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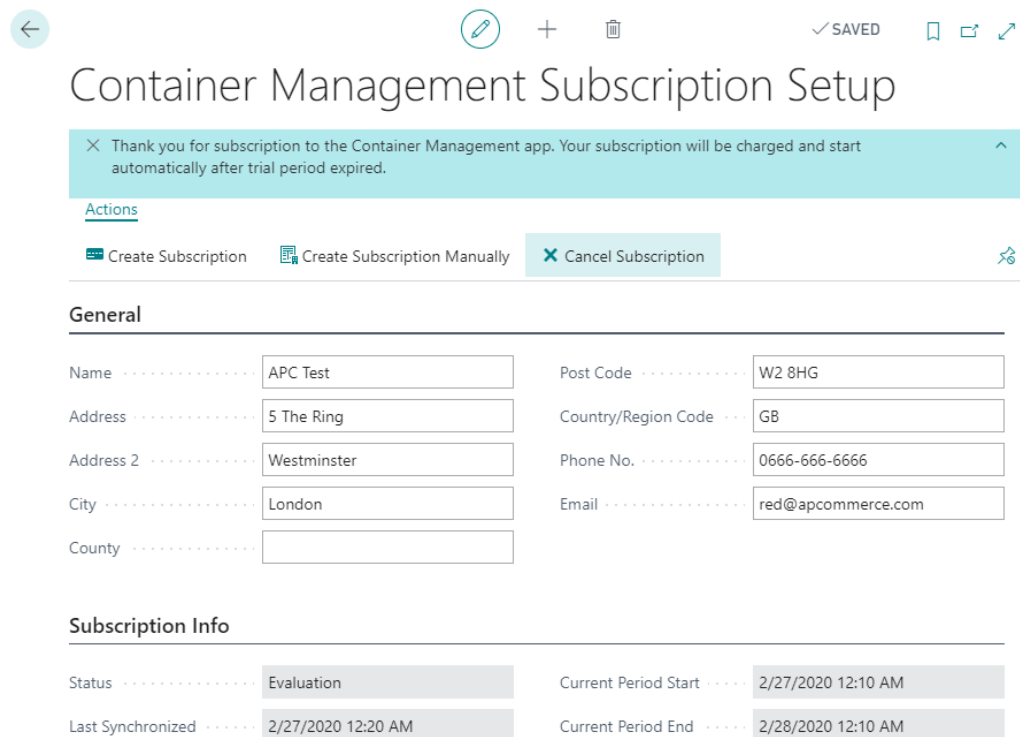
### Subscription Info

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**.

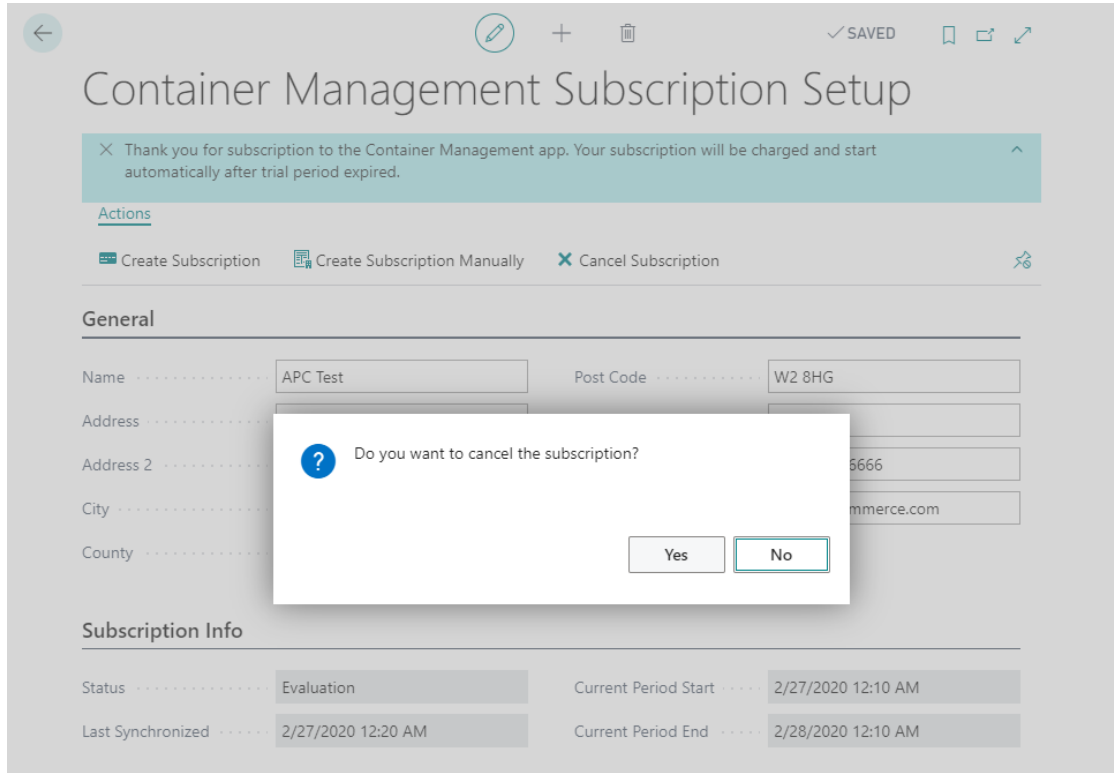
## Cancel the subscription if using card payment

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



The screenshot shows the 'Container Management Subscription Setup' page. At the top, there is a navigation bar with a back arrow, a pencil icon, a plus icon, a trash icon, and a 'SAVED' status. Below the title, a light blue banner contains a message: 'Thank you for subscription to the Container Management app. Your subscription will be charged and start automatically after trial period expired.' Below this, the 'Actions' dropdown menu is open, showing three options: 'Create Subscription', 'Create Subscription Manually', and 'Cancel Subscription' (which is highlighted with a red 'X' icon). The 'General' section contains form fields for Name (APC Test), Address (5 The Ring), Address 2 (Westminster), City (London), Post Code (W2 8HG), Country/Region Code (GB), Phone No. (0666-666-6666), and Email (red@apcommerce.com). The 'Subscription Info' section shows the Status as 'Evaluation', Current Period Start as '2/27/2020 12:10 AM', Last Synchronized as '2/27/2020 12:20 AM', and Current Period End as '2/28/2020 12:10 AM'.

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



The screenshot shows the 'Container Management Subscription Setup' page. At the top, there is a warning message: 'Thank you for subscription to the Container Management app. Your subscription will be charged and start automatically after trial period expired.' Below this, there are three action buttons: 'Create Subscription', 'Create Subscription Manually', and 'Cancel Subscription'. The 'Cancel Subscription' button is highlighted with a red 'X' icon. A modal dialog box is open in the center, asking 'Do you want to cancel the subscription?' with 'Yes' and 'No' buttons. The 'No' button is highlighted with a blue border. The background form has sections for 'General' (Name, Address, City, County, Post Code) and 'Subscription Info' (Status, Current Period Start, Last Synchronized, Current Period End). The 'Status' field is currently set to 'Evaluation'.

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 5666

City mmerce.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

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.



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✓ 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

City

County

6666

commerce.com

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

i

Subscription will be cancelled after current period end.

OK

←

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✓ 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

## 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.

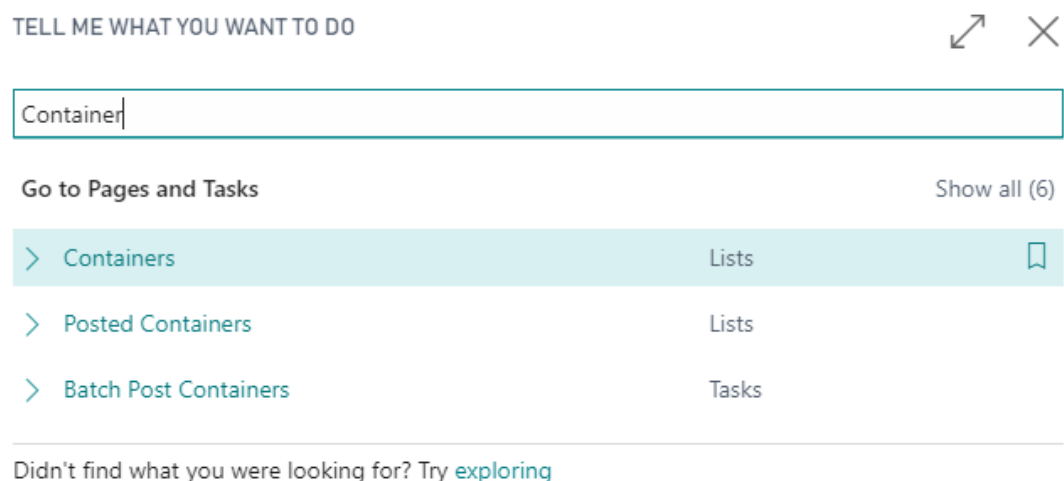
This app is built to help Business Central users managing container information and receiving items for multiple orders in one worksheet.

※[Appendix A](#) is the instruction about "How to create purchase order".

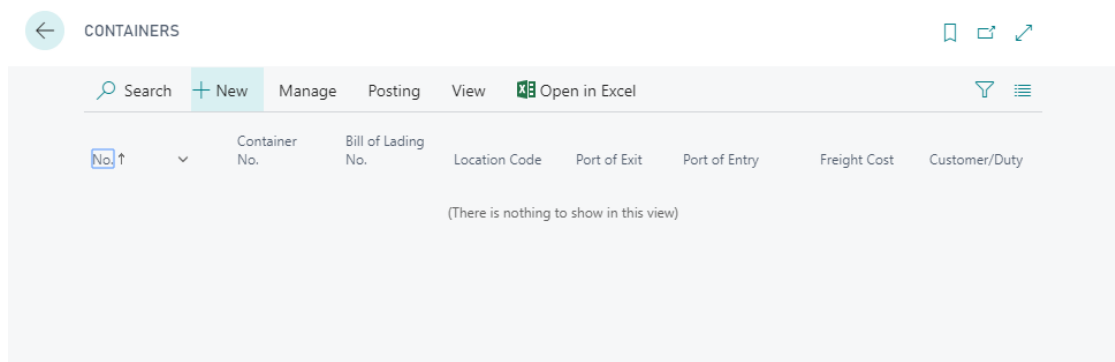
Below are the key functions for this app:

### 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.

## Container


 Post Container
  Get Purchase Lines

### General

Container No. .... *	<input type="text"/>	Port of Entry .....	<input type="text"/>
Bill of Lading No. .... *	<input type="text"/>	Freight Cost .....	<input type="text" value="0"/>
Expected Receipt Date ...	<input type="text"/>	Customer/Duty .....	<input type="text" value="0"/>
Location Code .....	<input type="text"/>	Posting Date .....	<input type="text"/>
Port of Exit .....	<input type="text"/>	Document Date .....	<input type="text"/>


Lines

Manage






Source No.	Source Line No.	No.	Description	Unit of Measure Code	Original Quantity
→		0			0

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


Search  Open in Excel

GET PURCHASE LINES

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

 New Line
  Delete Line
  Select More

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





Search  Open in Excel

GET PURCHASE LINES



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	1905-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.

Lines		Manage						
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

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				
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.

← CONTAINER 🔍 + 📄 ✓ SAVED 🔍 🔍

CON000001

[Post Container](#) [Get Purchase Lines](#)

**General**

Container No. ....	APCCON0001	Port of Entry .....	
Bill of Lading No. ....	APCCON0001	Freight Cost .....	0
Expected Receipt Date .....	2/27/2020	Customer/Duty .....	
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	Qty. to Receive	Warehouse Outstanding Quantity
PO00002	1896-S	ATHENS Desk	PCS	50	50	10	0.00
PO00002	1900-S	PARIS Guest Chair, black	PCS	100	100	20	0.00
PO00003	1908-S	Blue armless swivel chair	PCS	300	300	350	0.00
→ PO00003	1920-S	ANTWERP Conference Table	PCS	350	350	400	0.00

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.

← PURCHASE ORDER 🔍 + 📄 ✓ SAVED 🔍 🔍

PO00002 · Graphic Design Institute

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

**General** Show more

Vendor Name .....	Graphic Design Institute	Vendor Invoice No. ....	APCCONTEST0002
Contact .....	Byrce Jasso	Vendor Shipment No. ....	
Document Date .....	2/27/2020		

Lines | [Manage](#) [More options](#) 🔍 🔍

Type	No.	Description	Location Code	Direct Unit Cost Excl. VAT	Line Amount Excl. VAT	Unit of Measure Code	Quantity	Qty. to Receive	Quantity Received	Qty. to Invoice	Quantity Invoiced
Item	1896-S	ATHENS Desk	MAIN	506.60	25,330.00	PCS	50	50		50	
Item	1900-S	PARIS Guest Chair, black	MAIN	97.50	9,750.00	PCS	100	100		100	
Item	1906-S	ATHENS Mobile Pedestal	MAIN	219.50	43,900.00	PCS	200	200		200	

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.

**PURCHASE ORDER** PO00003 · Graphic Design Institute

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

**General** Show more

Vendor Name ..... Graphic Design Institute ..... Vendor Invoice No. .... APCCONTEST0002  
 Contact ..... Bryce Jasso ..... Vendor Shipment No. ....  
 Document Date ..... 2/27/2020

**Lines** Manage More options

Type	No.	Description	Location Code	Direct Unit Cost Excl. VAT	Line Amount Excl. VAT	Unit of Measure Code	Quantity	Qty. to Receive	Quantity Received**	Qty. to Invoice	Quantity Invoiced
Item	1908-S	Blue armless swivel chair	MAIN	96.10	28,830.00	PCS	300	300		300	
Item	1920-S	ANTWERP Conference Table	MAIN	328.00	114,800.00	PCS	350	350		350	
Item	1925-W	Conference Bundle 1-6	MAIN			PCS	400	400		400	

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

**POSTED CONTAINER** PCON000001

[View](#) [View Purchase Receipts](#)

**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	PRCT000002
PO00002	20000	1900-S	PARIS Guest Chair, black	PCS	100	100	20	PRCT000002
PO00003	10000	1908-S	Blue armless swivel chair	PCS	300	300	350	PRCT000003
PO00003	20000	1920-S	ANTWERP Conference Table	PCS	350	350	400	PRCT000003

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.

← PURCHASE ORDER ✎ + 🗑 ✓ SAVED 📄 🔍

PO00003 · Graphic Design Institute

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

**General** Show more

Vendor Name ..... Graphic Design Institute ... Vendor Invoice No. .... APCCONTEST0002  
 Contact ..... Bryce Jasso ..... Vendor Shipment No. .... APCCON0001  
 Document Date ..... 2/27/2020 📅

**Lines** Manage More options 🔍

Type	No.	Description	Location Code	Direct Unit Cost Excl. VAT	Line Amount Excl. VAT	Unit of Measure Code	Quantity	Qty. to Receive	Quantity Received	Qty. to Invoice	Quantity Invoiced
→ Item	1908-S	Blue armless swivel chair	MAIN	96.10	33,635.00	PCS	350		350	350	
Item	1920-S	ANTWERP Conference Table	MAIN	328.00	131,200.00	PCS	400		400	400	
Item	1925-W	Conference Bundle 1-6	MAIN			PCS	400	400		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.

TELL ME WHAT YOU WANT TO DO ↗ ✕

Batch Posted |

Go to Pages and Tasks


> **Batch Post Containers**

Tasks



Didn't find what you were looking for? Try [exploring](#)

## 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.

TELL ME WHAT YOU WANT TO DO ↗ ✕

Posted Contai

Go to Pages and Tasks

> **Posted Containers**

Lists



> **Batch Post Containers**

Tasks

Didn't find what you were looking for? Try [exploring](#)



## 2. Select a Posted Container Number.

← POSTED CONTAINERS 🔖 📄 ↗

🔍 Search Manage View Open in Excel 🔍 ☰

No. ↑	Container No.	Bill of Lading No.	Expected Receipt Date	Location Code	Port of Exit	Port of Entry	Freight Cost	Custom
<a href="#">PCON000001</a> ⋮	APCCON00...	APCCON00...	2/27/2020	MAIN			0	

← POSTED CONTAINER ✎ + 🗑 📄 ↗

# PCON000001

View

---

### 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 <span>📄</span>						
Source No.	Source Line No.	No.	Description	Unit of Measure Code	Origin Quantity	Outstar Qu.
→ 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 Tab...	PCS	350	

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



POSTED CONTAINER



PCON000001

[View](#)

[View Purchase Receipts](#)

General

No. ....	PCON000001	Port of Entry .....	
Container No. ....	APCCON00001	Freight Cost .....	0
Bill of Lading No. ....	APCCON00001	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.	
→ PO00002	:	10000	1896-S	ATHENS Desk	PCS	50	50	10 PRCT000002
PO00002		20000	1900-S	PARIS Guest Chair, black	PCS	100	100	20 PRCT000002
PO00003		10000	1908-S	Blue armless swivel chair	PCS	300	300	350 PRCT000003
PO00003		20000	1920-S	ANTWERP Conference Table	PCS	350	350	400 PRCT000003




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. ▼
PRCT000003	30000	Graphic Design Institute	MAIN	0	APCCON00001	CON000001
PRCT000002	30000	Graphic Design Institute	MAIN	0	APCCON00001	CON000001

## 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.

TELL ME WHAT YOU WANT TO DO  

Purchase Orders

**Go to Pages and Tasks** Show all (6)

<a href="#">Purchase Orders</a>	Lists	
<a href="#">Purchase Return Orders</a>	Lists	
<a href="#">Blanket Purchase Orders</a>	Lists	









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**Go to Reports and Analysis** Show all (4)

<a href="#">Inventory Purchase Orders</a>	Reports and Analysis	
<a href="#">Purchase Order Archives</a>	Archive	
<a href="#">Purchase Return Order Archives</a>	Archive	

Didn't find what you were looking for? Try [exploring](#)

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

APC Test   Finance ▾   Cash Management ▾   Sales ▾   <b>Purchasing ▾</b>   Setup & Extensions ▾   Intelligent Cloud Insights ▾   										
Purchase Orders: All ▾    Search   <a href="#">+ New</a>    Delete   Print/Send ▾   Order ▾   Release ▾   Posting ▾   ...       										
No. ↑	Buy-from Vendor No.	Buy-from Vendor Name	Vendor Authorizati... No.	Location Code	Assigned User ID	Document Date	Status	Amount	Amount Incl	
106001	10000	Fabrikam, Inc.				4/8/2020	Open	3,546.20	3.5	
106002	20000	First Up Consultants				4/9/2020	Open	1,365.00	1.7	
106003	40000	Wide World Importers				4/13/2020	Open	7,092.00	8.8	
106004	30000	Graphic Design Institute				5/1/2020	Open	2,375.40	2.3	

Make sure the fields with start sign be filled properly.

← PURCHASE ORDER ✎ + 🗑 ✓ SAVED 📄 🔍

PO00001

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

**General** Show less

Vendor No. ....	<input type="text"/>	Due Date .....	<input type="text"/>
Vendor Name .....	* <input type="text"/>	Vendor Invoice No. ....	* <input type="text"/>
BUY-FROM		Purchaser Code .....	<input type="text"/>
Address .....	<input type="text"/>	No. of Archived Versions .....	0
Address 2 .....	<input type="text"/>	Order Date .....	3/8/2020
City .....	<input type="text"/>	Quote No. ....	<input type="text"/>
Post Code .....	<input type="text"/>	Vendor Order No. ....	<input type="text"/>
Country/Region .....	<input type="text"/>	Vendor Shipment No. ....	<input type="text"/>
Contact No. ....	<input type="text"/>	Alternate Vendor Address Co... ..	<input type="text"/>
Contact .....	<input type="text"/>	Responsibility Center .....	<input type="text"/>
Document Date .....	3/8/2020	Assigned User ID .....	<input type="text"/>
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

Subj 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