Freight Container Management

Table of Contents

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Installation & Setup

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

Creating the Subscription

1) Go to the Extension Marketplace and click on the app you want to subscribe to.
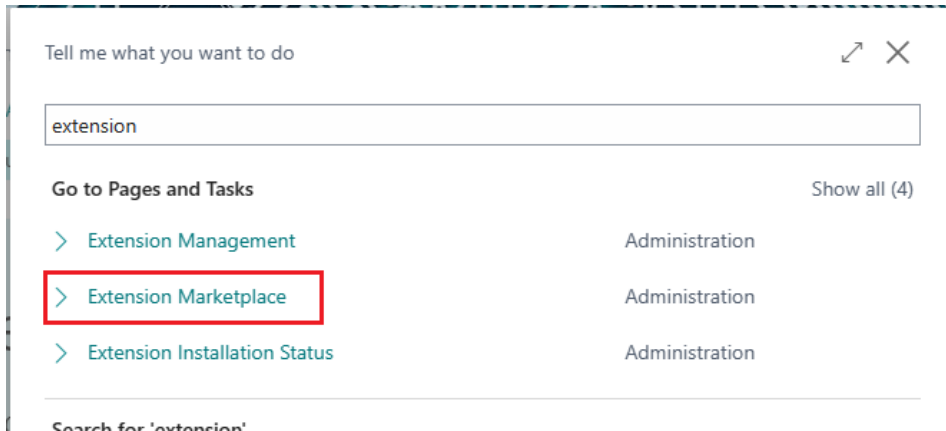
2) Search "Freight Container" in the AppSource to find the Freight Container Receiving Management and open the information page.

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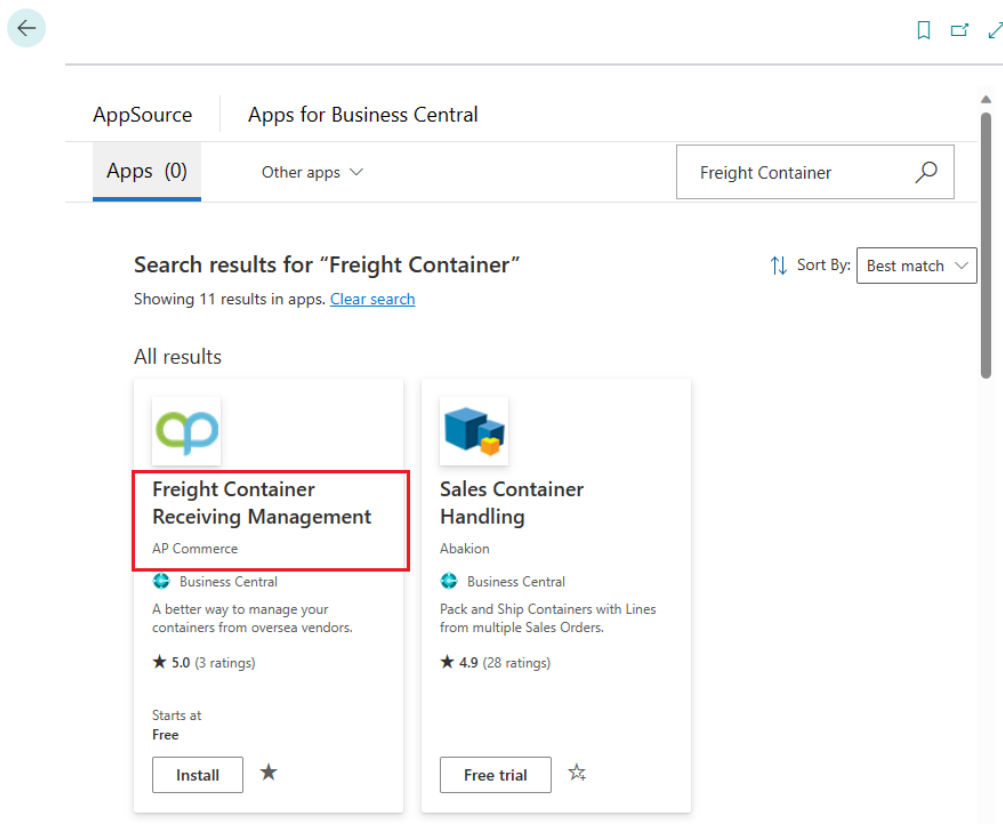
3) On the **Drop Down** next to **Buy Now**.

4) Click on **Buy Now**.

5) Click on **Buy now**

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Microsoft | AppSource

☰ All   Apps ∨   Categories ∨   Industries ∨   Consulting Services ∨   Partners ∨

Apps > **Freight Container Receiving Management**

Freight Container Receiving Management

by AP Commerce

🌐 Dynamics 365 Business Central

★ 5.0 (3 ratings)

Starts at Free | **Buy now** | | Contact me | ★ Saved

Overview   **Plans + Pricing**   Ratings + reviews   Details + support

Plan	Description
Small Team Plan	Small Team Plan (4-10 users: $30 per user):

6) Select a plan and click **Next**.
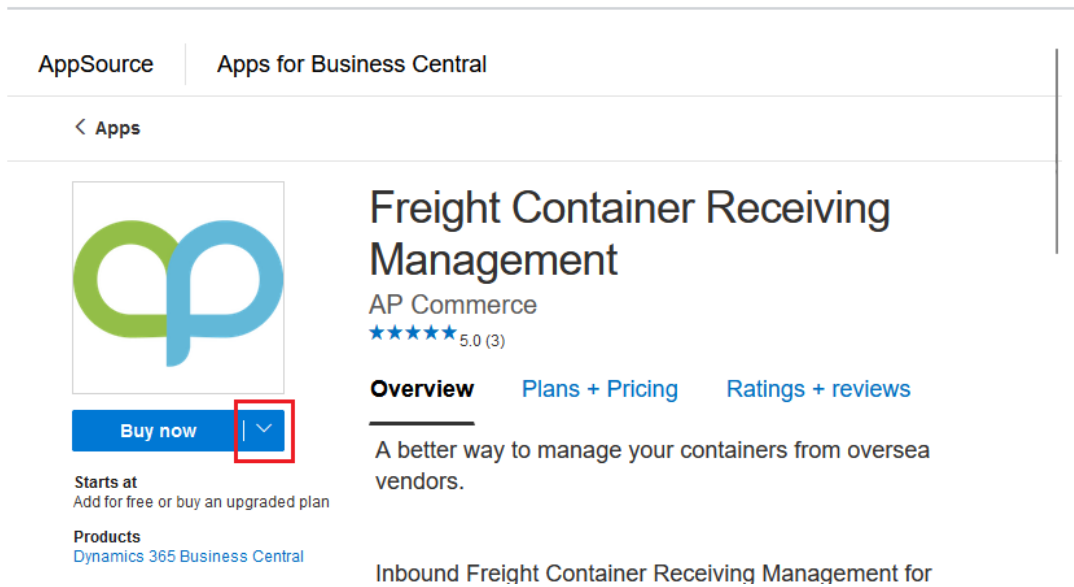
Apps > Freight Container Receiving Management > **Checkout**

Checkout

● Plan

○ Price + billing

○ Payment

○ Complete purchase

Select a plan

Freight Container Receiving Management

✓ **Small Team Plan**   Free trial

Description
Small Team Plan (4-10 users: $30 per user):
Perfect for small teams of 4 to 10 users. Enjoy cost-effective solutions
tailored to the needs of compact teams.

| Next |

7) Go through the Billing information pages.

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Apps > Freight Container Receiving Management > **Checkout**

Checkout

✓ Plan

● Price + billing

○ Payment

○ Complete purchase

Price + billing

Billing term ⓘ *
1-month subscription

Price/payment options ⓘ *
First month free, then $30.00/user/1-month

Recurring billing ⓘ *
◉ On
○ Off

Number of users (4-10) *

```
4
```

Up next, choose your payment method:

Credit card	**Invoice pay New!**
Use a credit card to make an online payment.	If your organziation has been approved for payment by invoice, select Invoice pay on the next page to pay with a check or wire transfer.
Accepted payment methods:	
VISA AMERICAN EXPRESS mastercard	Learn more about paying by invoice ⧉

Back   **Next**

8) Enter your payment information.

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Apps > Freight Container Receiving Management > **Checkout**

Checkout

✓ Plan

✓ Price + billing

● Payment

○ Complete purchase

Payment

Product name		Price (USD)	Quantity	Subtotal (USD)
Offer	Freight Container Receiving Management	First month free, then $30.00/user/one-time payment	4	$120.00 for 1 month
Plan	Small Team Plan Free trial			
Billing term	1-month subscription			
Recurring billing	On			

Sold-to address *
Enter the address of the legal entity responsible for payment and identified on the invoice. The address provided here is used to determine your tax rate.

Billing account

AP Commerce, Inc.   ⌄

✎ Edit
AP Commerce, Inc.
12304 Santa Monica Blvd. STE 300
Los Angeles, CA 90025-2593
US

Bill to *

Select the billing profile you want to use for this purchase. You can also edit an existing profile. Learn more about billing profiles

Billing profile

APC   ⌄

✎ Edit   + Add new

[Back] [**Accept agreement & place order**]

9) Click on the **Accept agreement & place order.**

Summary

Subtotal after trial (before tax):
Estimated taxes: ⓘ
Total:

Free trial

You'll start being charged after the first month of free trial for this subscription.

[Back] [**Accept agreement & place order**]

10) Click on **Assign license** to open the **Microsoft 365 admin center.**

Apps > Freight Container Receiving Management > **Checkout**

Checkout

- ✅ Plan
- ✅ Price + billing
- ✅ Payment
- 🟢 Complete purchase

Complete purchase

✅ **Thank you for your purchase**

 Freight Container Receiving Management

✅ Your order was processed successfully.

Offer details	**Invoice details**
Offer	Sold to
Freight Container Receiving Management	
	AP Commerce, Inc.
Plan	
Small Team Plan	
Billing term	
1-month	
Price/payment options	
First month free, then $30.00/user/1-month + tax	
Recurring billing ⓘ	
On	
Total	
$0.00	
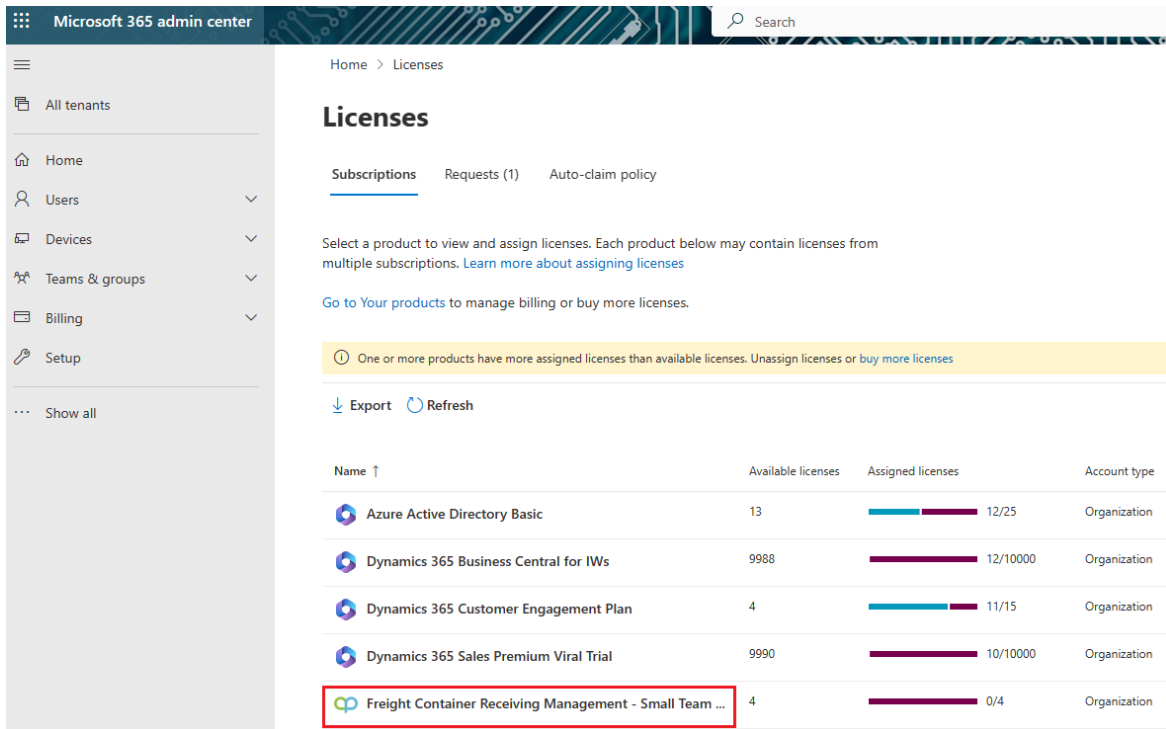
Next steps

Now, assign the licenses you purchased to users in your tenant via Admin center. From there you can proceed to install this app. To manage your licenses anytime, click on your account at the top right, open **Admin center** and go to **Licenses**.

Back | **Assign licenses**

11) Click on the app that is just purchased.

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12) Click on **Assign Licenses** to assign the licenses to the users that will be using the app.

Home > Licenses > License details

Back to Licenses

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Licenses

4 available

0 assigned of 4 total
Install this product

Users

Manage and view licenses for your users.

+ Assign licenses   ↓ Export users   ↻ Refresh

☐   Name   Email   Type

13) Click on **Install this Product** to install the app in your tenant.

Back to Licenses

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Licenses

3 available

1 assigned of 4 total
Install this product

Users

Manage and view licenses for your users.

14) Select an environment and click on **Install.**
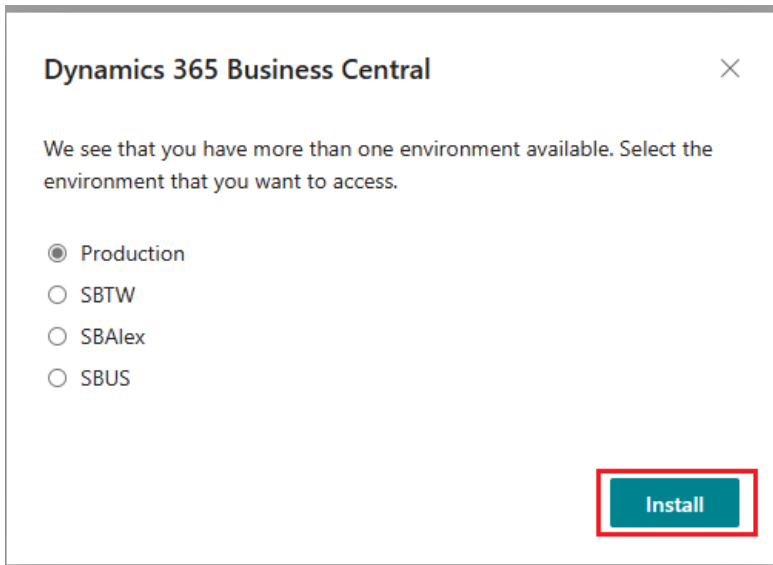
15) Choose a language and click on **Install.**
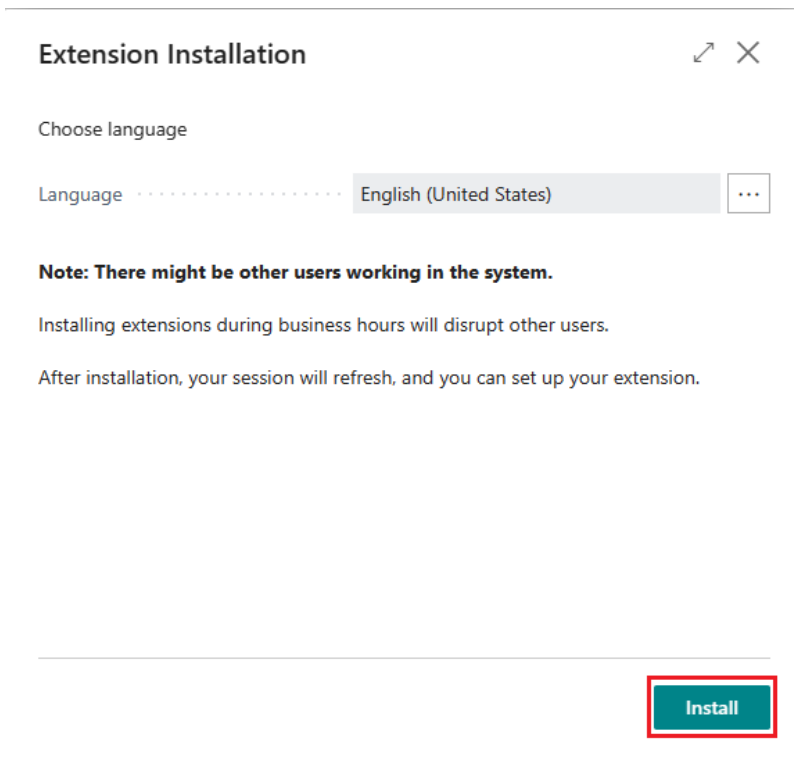
Cancelling the Subscription

1) To Cancel Subscription, open the **Microsoft 365 admin center** and go to **Billing**>>**Your Products**.

2) Click on the app you want to cancel the subscription for and click on **Cancel Subscription**.

# Setup the Freight Container Receiving Management App

Assign User Permission Set

1) Choose the 🔍 icon to 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 necessary permission sets based on the role of the user:

   a) **APCCNTRADMINE**

       i) Assign this to the users that are considered administrators of the app setup.

       ii) These users must be licensed through the Microsoft 365 admin center.

   b) **APCCNTRUSERE**

       i) Assign this to the users that are considered administrators of the app setup.

       ii) These users must be licensed through the Microsoft 365 admin center.

   c) **APCCNTRREADE**

       i) Assign this to all users.

       ii) These users **do not need to be licensed**, but this permission set must be assigned to prevent any licensing errors while using areas touched by the app. (ex.: flowfields on Purchase Lines, Item Ledger Entries, etc.)

   d) **APCCNTRTESTUSERE**

       i) A special license is available to be used to allow one account to test this app in a Sandbox/

       ii) This permission set is only for use in a Sandbox environment and cannot be assigned to any user in a Production environment.

Permission Set ↑	Name	Type ↑	Extension Name
APCCNTRADMINE	Container Mgmt - Admin	System	Freight Container Receiving Management
APCCNTRREADE	Container Mgmt Read Only	System	Freight Container Receiving Management
APCCNTRTESTUSERE	Container Mgmt - Test User	System	Freight Container Receiving Management
APCCNTRUSERE	Container Mgmt - User	System	Freight Container Receiving Management

Assisted Setup

1) Choose the 🔍 icon to enter **"Assisted Setup"** and click on the related link.

2) Search "Container" to find the **Setup Freight Container Receiving Management** and click on the link. This will launch the wizard for setup process.
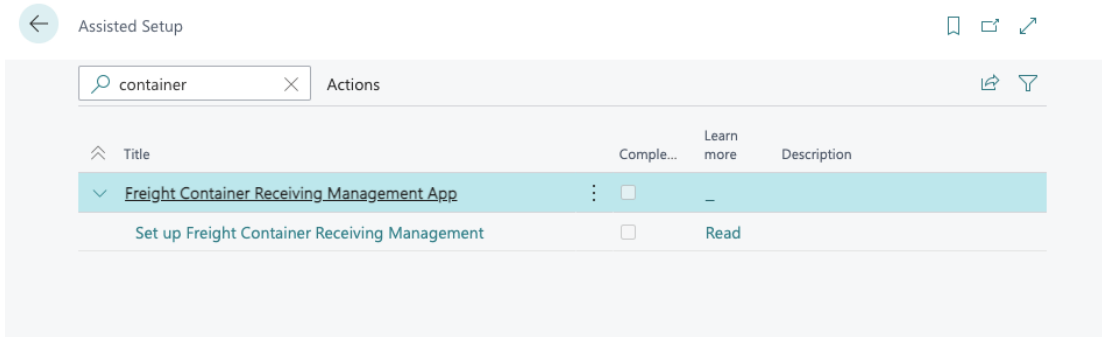
3) Input the required info on the **Customer details** page and click on Next.

   a) You must enter an email address in order to click on the Next button

4) On the **Number Series** section, select a **No. Series** for **Container Nos.** and **Posted Container Nos.** The app automatically creates the **No. Series** of **"P-CON"** and **"P-CON+"** during the install and inserted into the No. Series fields by the setup wizard.
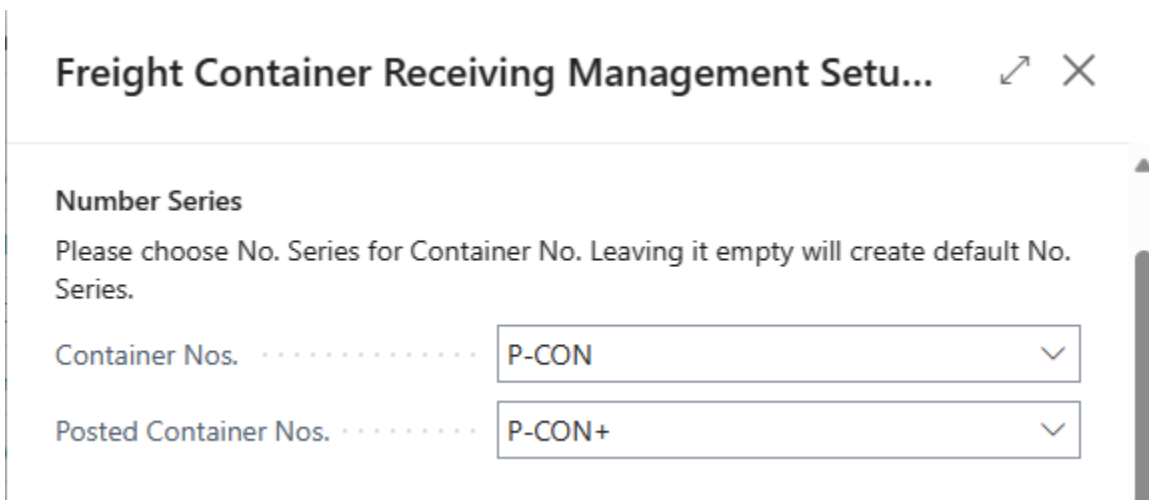
5) On the **On the water process** section, enter the **Default Inbound Transition Leadtime** (optional) to specify the default date formula to calculate the Estimated Receipt Date based on the Vessel Arrival Date, for example, 1W. Enter **Default Transfer Order In-transit Location** to specify the default In-transit Location Code to use to transfer inventory to the final location. Enter **Default On the Water/Air Location** to specify the default On the Water/Air Location Code to use when receiving items from overseas. Leave blank if you do not use OTW locations.

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On the water process

Please fill in the default values for on the water process. If you still not decided yet to use it or not, just leave this part blank. You can fill in later on the container setup page.

Default Inbound Transit Leadti... ·

Default Transfer Order In-trans... ·

Default On the Water/Air Loca... ·

| Back | **Next** | Finish |

To use existing location, make sure to enable the **On the Water Location** trigger on the location card. Click **Next** to proceed with the setup.

Location Card ✓ Saved

OTW · On the Water Location

🖼 Zones   🖨 Bins   📑 Inventory Posting Setup   📇 Warehouse Employees   🗺 Online Map   ⚗ Dimensions   ···

General

Code	OTW	Exclude from Tax Calc... · ⬤
Name	On the Water Location	Tax Area Code ········
Use As In-Transit ····· ⬤		Tax Exemption No. ·····
On The Water Location · 🟢		

6) On **All Done** page, Click **Finish** to complete setup.

Freight Container Receiving Management Setu... ⤢ ✕

✓
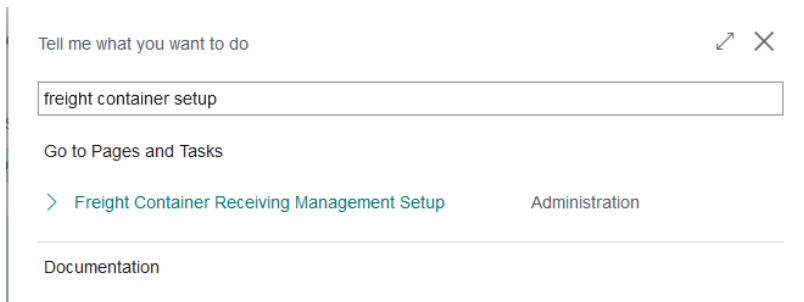
All done

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

| Back | Next | **Finish** |

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Modify the Freight Container Management Setup

1) Choose the 🔍 icon to enter and select the **Freight Container Receiving Management Setup** link to open the setup page.
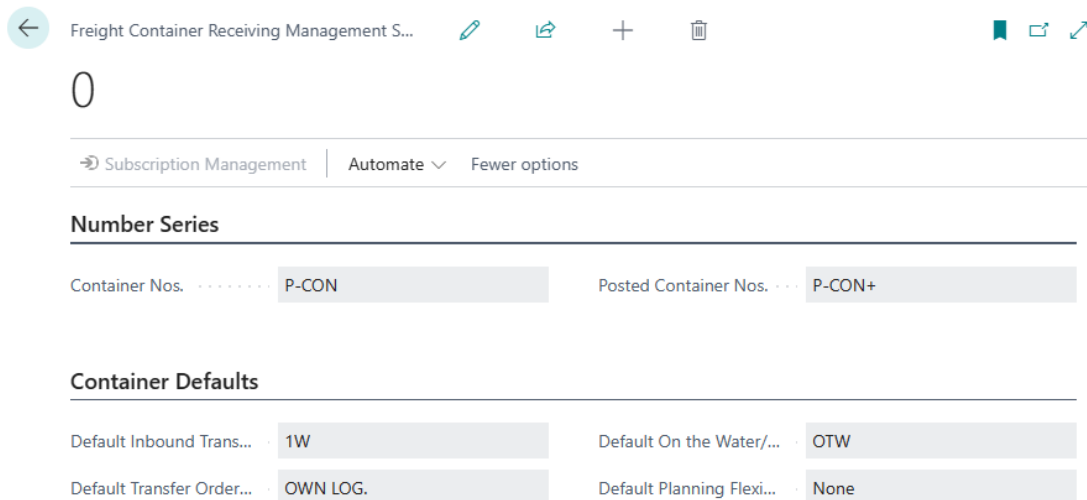
2) On the **Freight Container Receiving Management Setup** page, users may change Number Series and Container Defaults configuration as needed.

a) **Container Nos.**

   i) Specifies the code for the number series that will be used to assign numbers to Containers.

b) **Posted Container Nos.**

   i) Specifies the code for the number series that will be used to assign numbers to Posted Containers.

c) **Default Inbound Transit Leadtime**

   i) Specifies the default date formula to calculate the Estimated Receipt Date based on the Vessel Arrival Date.

d) **Default Transfer Order In-transit Location**

   i) Specifies the default In-transit Location Code to use to transfer inventory to the final location.

e) **Default On the Water/Air Location**

   i) Specifies the default On the Water/Air Location Code to use when receiving items from overseas. Leave it blank if you do not use OTW locations.

f) **Default Planning Flexibility**

   i) Specifies Planning Flexibility on Transfer Order Lines to prevent Planning processes from recommending action

against the transfer line when running MRP.

User Guide (WITH On the Water Location)

The company places orders with their overseas factories, which prepare the shipments and send the items back to the domestic company in containers. During the shipping and receiving stage, users may encounter challenges when using the out-of-the-box Business Central process. The Freight Container Management App provides a consolidated solution for procurement users to handle multiple orders and complex processes.

The major features include:
- Receiving multiple orders within one container.
- Recording inventory into the On the Water Location for FOB transactions.
- Tracking the receiving process with different stages (Departure, Arrival, and Final Location) to give users a clearer visibility of the goods.
- Allocating landed costs for multiple orders with flexibility.
- More features will be present in the next release…

Here are the main steps to follow when processing containers when using the OTW location:

Setting up purchase order

1. Choose the 🔍 icon and enter "Purchase Orders" to open the purchase order list page.

2. Click on **New** to create a new purchase order.

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3. Select **Vendor Name** and enter **Items** to be purchased. Make sure the fields with star signs are filled properly. With the release of version 1.6.1, you are no longer required to set the Location Code on the purchase lines to your On the Water location. You are now able to add lines that are either set to the **On the Water** location or the **Final Destination** location from your container record. However, when you process the Departure, the location code on the Purchase Line will update with the **On the Water** location from the Container.

Before adding a purchase document to a container, you will need to set up item tracking for any Serial/Lot Controlled items on the document.

Create a Container Document

1. Choose the 🔍 icon and enter "Container" to open the **Containers** list page.
2. Click on **New** to create a new Container document.
3. Enter **Container No.** and **House Bill of Lading No.** of the shipment. Assign the **Final Destination Location Code** for the shipment.

Specify On the Water Location

Specify the **On the Water/Air Location Code**.

Get Purchase Lines from PO to match BOL

1. On the Container Line, click on **Get Container Lines** menu and click on **Get Purchase Lines** to open purchase lines that will go to the **On the Water/Air location**. This list will display purchase lines for the **On the Water Location** as well as the **Final Destination Location** that have not been assigned to any Container Documents.

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2. Select purchase lines that should be included in this container based on the shipping document then click on **OK**. This feature allows user to put Items purchased from different vendors into one Container Document.

3. The purchase lines have been imported into the Container Document Line.

* Before adding a purchase document to a container line, you will need to set up item tracking for that document. This ensures that tracking information can be added to the container line and processed correctly.

Please refer to the Serial/Lot Controlled Item Lines section of this manual for instructions on how to add item tracking for to the Container Line.

Processing Departure

1. Enter the **Posting Date** based on vendors' shipping document and click on **Process Departure**. The purchase document will be posted receive using the **Posting Date** on the Container Document.

2. Click on **Yes** to post receive for **all** the quantities on purchase order lines for this Container Document.

3. The **Container Status** will be changed to **Departed**. The **Outstanding Quantity** & **Qty. to Receive** (Source Doc) will be 0.

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4. On the right side FactBox of the Container Document, user can view **Purchase Information** section to know the posted purchase receive information.

5. Click on the **Purchase Qty. Received** on the Container Document to view the posted purchase document for each item.

6. On the posted purchase receipt, the user can see the **Posting Date** and **Container Doc. No.** are the same as Container Document. The **Container No.** and **House Bill of Lading No.** on the Container Document will also be

brought from the Container Document to the Posted Purchase Document.

7. A transfer order will be automatically created from **On the Water/Air Location** to the **Final Destination Location**. The right side FactBox on the Container Document will display the related Transfer Information. User can open the transfer order by clicking on **View Transfer Order Document** under Container Line menu.

8. Click on **Show Document** to open the transfer order.

The **Transfer-from Code** will be **On the Water/Air Location Code** on the Container Document and the **Transfer-to Code** will be the **Final Destination Location Code** on the Container Document. The transfer order will remain open till user proceed to the next status.

Update Departure Date and Estimated Arrival Date

When confirming the vessel departure progress, user can update the **Date of Departure** and the **Expected Date of Arrival** on the Container Document.

Undo Departure

This can only be performed when a Container line is in the Departer Line Status.

*As of version 1.6.2, this action is only allowed for Items that are not Lot or Serial Controlled. This will be available with a future release.

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1. Select the Container Line that needs to be undone.

	Container Line Status		Source Document Type	Source No.	Type	No.
	Departed		Purchase	106050	Item	1000
→	Departed	⋮	Purchase	106050	Item	1001
	Departed		Purchase	106050	Item	1964-S
	Departed		Purchase	106050	Item	1984-W

2. Click the **Line** action and select **Purchases**>>**Undo Departure**

Lines | Manage **Line** Get Container Lines

Purchases ∨   Transfers ∨   ⊞ Source Item Tracking Lines   ⊞ Container Item Tracking

📄 View Purchase Document	rchase	106050	Item	1000
➕ Change Qty. to Receive	rchase	106050	Item	1001
↺ Undo Departure	rchase	106050	Item	1964-S
Departed	rchase	106050	Item	1984-W

You are also able to click on the **Show More** button on Container Line to click on **Undo Departure**

Purchases

📄 View Purchase Document

➕ Change Qty. to Receive

↺ Undo Departure

Manage

⊠ Delete Line

☰ Select More

⊞ Process Arrival   ⊞ Process Final Location   ⊟ Landed C

Final Destinati...   ·   MAIN

ine   Get Container Lines

Source Document Type	Source No.	Type	No.
Purchase	106050	Item	1000
Purchase	106050	Item	1001

3. Click Yes

(?) Do you really want to undo the selected Receipt lines?

Yes	No

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4. Click Yes

> ? This Purchase Receipt is associated with a Container. Are you sure you want to undo this Purchase Receipt?

Yes	No

5. The Container Line Status will now be reset back to the blank, pre-Departure status for the line selected.

Lines | Manage | Line | Get Container Lines

Container Line Status	Source Document Type	Source No.	Type	No.
Departed	Purchase	106050	Item	1000
→ _	Purchase	106050	Item	1001
Departed	Purchase	106050	Item	1964-S
Departed	Purchase	106050	Item	1984-W

You will see that the **Purchase Receipt Information** for that line will update from this:

Container Detail

Container Line Status	Departed
Document Type	Order
Document No.	106050
Document Line No.	20000
Line Cost	45,000.00

Purchase Receipt Information

Purch. Rcpt. No.	107282
Purch. Rcpt. Line No.	20000
Purchase Qty. Received	100

Transfer Information

Transfer Shipment

to this:

Container Detail

Container Line Status	
Document Type	Order
Document No.	106050
Document Line No.	20000
Line Cost	45,000.00

Purchase Receipt Information

Purch. Rcpt. No.	
Purch. Rcpt. Line No.	
Purchase Qty. Received	_

Transfer Information

This will also disable the **Process Arrival** and re-enable the **Process Departure** actions at the top of the Container Card:

Container

CON000039

| | Process Departure | | Process Arrival | | Process Final Location | | Landed Cost Allocation | |

	Container Line Status	Source Document Type	Source No.	Type	No.	D
	Departed	Purchase	106050	Item	1000	B
→	-	Purchase	106050	Item	1001	T
	Departed	Purchase	106050	Item	1964-S	T

6. You can now adjust the Container Qty. as needed:

	Container Line Status	Unit of Measure Code	Qty. on Container ⌄	Qty. to Receive
	Departed	PCS	250	0
→	-	PCS	25	25
	Departed	PCS	400	0

7. When ready, click **Process Departure** to reprocess any line not in the Departed status

8. The Container Line will now show as **Departed** and the **Purchase Receipt Information** will be updated with the new receipt information:

Container Detail

Container Line Status	Departed
Document Type	Order
Document No.	106050
Document Line No.	20000
Line Cost	45,000.00

Purchase Receipt Information

Purch. Rcpt. No.	107289
Purch. Rcpt. Line No.	20000
Purchase Qty. Received	25

Process Arrival

1. Before vessel arrive, user can update the **Expected Date of Arrival** on the Container Document.

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NOTE: If the **On the Water/Air Location Code** is **used** in this Container Document, this is the last chance user can update the Final Destination Location Code.

If the **Inbound Transmit Leadtime** is maintained, the **Estimated Receipt Date** will be auto updated based on the expected arrival date and the lead time.

2. When vessel arrived, update the **Posting Date** on the Container Document, and click on **Process Arrival**.

Click on **Yes** to proceed the Arrival process.

3. The open transfer order for this Container Document will be posted ship using the **Posting Date** on the Container Document. The inventory will be moved from **On the Water/Air Location** to the **In-Transit Location**. User can view the posted transfer shipment info on the Container Document FactBox.

The **Posting Date** of the Posted Transfer Shipment will be the same as the Posting Date on the Container Document that user updated <u>before</u> clicking on the **Process Arrival**.

Process Final Destination

1. When Container finished custom clearance at the port, user can update the **Posting Date** on the Container Document and click on **Process Final Location**.

Click on **Yes** to proceed the Post Container Document process.

Do you want to post the container?

Yes	No

2. The open transfer order for this Container Document will be posted receive using the **Posting Date** on the Container Document. The inventory will be moved from the **In-Transit Location** to the **Final Destination Location**.

Posted Transfer Receipt

109017

Process   Receipt | More options

General

No.	109017	In-Transit Code	OWN LOG.
Transfer-from Code	OTW	Transfer Order No.	1070
Transfer-to Code	BLUE	Transfer Order Date	8/5/2022
Direct Transfer	⬤	Posting Date	8/5/2022

Lines   Manage   More options

Item No.		Description	Quantity	Unit of Measure Code	Shipping Time	Customergroup Code	Area Code	Businessgroup Code	Salescampaign Code	Container No.
→ 1850	:	Saddle	58	PCS						
1896-S		ATHENS Desk	200	PCS						
1110		Rim	100	PCS						

3. The Container Document will be deleted if fully processed. A Posted Container Document will be created.

Posted Container

PCON000033

Landed Cost Allocation | More options

General

No.	PCON000033	**Departure Information**	
Container No.	TEST223344	Port of Departure	CHN
Container Doc. No.	CON000072	Date of Departure	5/30/2022
House Bill of Lading No.	B99887766	On the Water Location Code	OTW
IncoTerms Code		**Arrival Information**	
Status	Complete	Port of Arrival	LA
Posting Date	8/5/2022	Expected Date of Arrival	7/31/2022
Document Date	5/26/2022	Inbound Transit Leadtime	1W
Vessel Information		Expected Receipt Date	8/7/2022
Shipping Line		Location Code	BLUE
Vessel Name			
Voyage			

Lines   Manage

Source No.		No.	Description	Unit of Measure Code	Original Quantity	Outstanding Quantity	Received Qty.	Purch. Rcpt. No.
→ 106110	:	1850	Saddle	PCS	58	0	0	107292
106110		1896-S	ATHENS Desk	PCS	200	0	0	107292
106109		1110	Rim	PCS	100	0	0	107291

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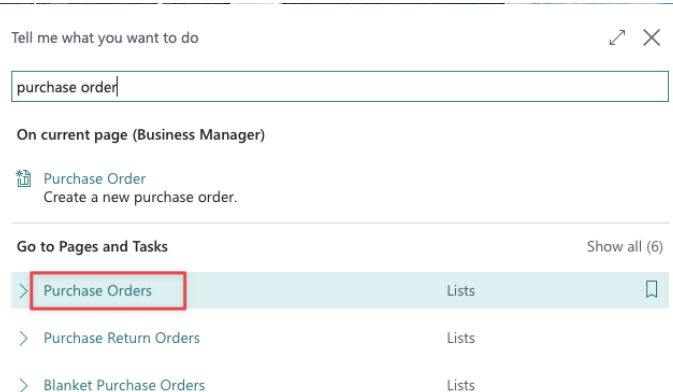
User Guide (WITHOUT On the Water Location)

If the company does not want to track the quantity on the water, the container app can still be used to combine the purchase lines into one container document.

Here are the main steps to follow when processing containers without using the OTW location:

Setting up purchase order

1. Choose the 🔍 icon and enter "Purchase Orders" to open the purchase order list page.

2. Click on **New** to create a new purchase order.

3. Select **Vendor Name** and enter **Items** to be purchased. Assign location code based on the Final Destination Location Code

Create a Container Document

1. Choose the 🔍 icon and enter "Container" to open the **Containers** list page.
2. Click on **New** to create a new Container document.
3. Enter **Container No.** and **House Bill of Lading No.** of the shipment. Assign the **Final Destination Location Code** for the shipment.

Container
CON000005

Process Departure | Process Arrival | Process Final Location | Landed Cost Allocation

General

Container No.	CTN01982919	
House Bill of Lading No.	BOL19827877	
IncoTerms Code		
Posting Date	4/11/2022	
Document Date	4/11/2022	

Vessel Information

Shipping Line	
Vessel Name	
Voyage ID	

Departure Information

Port of Departure	XIAMEN
Date of Departure	
On the Water/Air Location Code	

Arrival Information

Port of Arrival	LA
Expected Date of Arrival	
Inbound Transit Leadtime	7D
Estimated Receipt Date	
Final Destination Location Code	MAIN

Get Purchase Lines from PO to match BOL

1. On the Container Line, click on **Get Container Lines** menu and click on **Get Purchase Lines** to open purchase lines that will go to the **Final Destination Location Code**. This list will display purchase lines for this location that have not been assigned to any Container Documents.

Lines	Manage	Line	Get Container Lines	Fewer options

⊙ Get Purchase Lines

Get Purchase Lines

🔍 Search | Show as menu

	Document No. ↑	Line No. ↑	Buy-from Vendor No.	Type	No.	Description	Unit of Measure Code	Location Code	Quantity
✓	106006	20000	10000	Item	1929-W	Conference Bundle 1-8	PCS	MAIN	2
✓	106009	10000	40000	Item	1896-S	ATHENS Desk	PCS	MAIN	5
○	106009	20000	40000	Item	1969-W	Conference Package 1	PCS	MAIN	6
→ ✓	106010	10000	20000	Item	1980-S	MOSCOW Swivel Chair, red	PCS	MAIN	3

2. Select purchase lines that should be included in this container based on the shipping document then click on **OK**. This feature allows user to put Items purchased from different vendors into one Container Document.

3. The purchase lines have been imported into the Container Document Line.

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* Before adding a purchase document to a container line, you will need to set up item tracking for that document. This ensures that tracking information can be added to the container line and processed correctly. Please refer to the Serial/Lot Controlled Item Lines section of this manual for instructions on how to add item tracking for to the Container Line.

Processing Departure

1. Enter the **Posting Date** based on vendors' shipping document and click on **Process Departure**. The purchase document will be posted as received using the **Posting Date** on the Container Document.

2. Click on **Yes** to indicate the container has departed its port of departure
3. The **Container Status** will be changed to **Departed** on the container lines.

Undo Departure

This can only be performed when a Container line is in the Departer Line Status.

8.1.1.1.1.1.1. Select the Container Line that needs to be undone.

8.1.1.1.1.1.2. Click the **Line** action and select **Purchases**>>**Undo Departure**

You are also able to click on the **Show More** button on Container Line to click on **Undo Departure**

8.1.1.1.1.1.3. The Container Line Status will now be reset back to the blank, pre-Departure status for the line selected.

This will also disable the **Process Arrival** and re-enable the **Process Departure** actions at the top of the Container Card:

8.1.1.1.1.1.4. When ready, click Process Departure to reprocess any line not in the Departed status

Process Arrival

1. Before the vessel arrives, user can update the **Expected Date of Arrival** on the Container Document. If the **Inbound Transmit Leadtime** is maintained, the **Estimated Receipt Date** will be auto updated based on the expected arrival date and the lead time.

2. When shipping vessel arrived, update the **Posting Date** on the Container Document, and click on **Process Arrival**.

Click on **Yes** to proceed with the Arrival process.

Adjusting Quantity

1. Before receiving the container into the final destination, user can update the quantity on the Container Document Line.

2. If the actual quantity is more than the purchase quantity, user can add quantity by clicking on specific item then select the **Line** > **Purchases** > **Change Qty. to Quantity.**

3. A pop-window will display the purchase line information of the selected item. Enter the additional quantity in the **New Qty. to Receive** then click on **OK**.

If the quantity is greater the quantity ordered, a new purchase line will be added into the Container Document and the original Purchase Document addressing the additional quantity. If the quantity is less than the quantity ordered, then it will just update the Qty. to Receive on the purchase line

Process Final Destination

1. When the container is received and accounted for, update the **Posting Date** on the Container Document and click on **Process Final Location**. Processing the final destination will post the purchase receipt or generate and post the Warehouse Receipt if Required Receive is enabled on the location card.

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Container

CON000005

Process Departure   Process Arrival   **Process Final Location**   Landed Cost Allocation

General

Container No. · · · · · · · · · · ·	CTN01982919	Departure Informa	
House Bill of Lading No. · · · · · · · · · ·	BOL19827877	Port of Departure	
IncoTerms Code · · · · · · · · · ·	⌄	Date of Departure	
Posting Date · · · · · · · · ·	4/11/2022 🗓	On the Water/Air Lo	
Document Date · · · · · · · · · ·	4/11/2022 🗓	Arrival Information	
Vessel Information		Port of Arrival · · ·	
		Expected Date of A	

Click on **Yes** to proceed the Post Container Document process.

❓ Do you want to post the container?

[Yes] [No]

2. The Container Document will be deleted if fully processed. A Posted Container Document will be created.

Serial/Lot Controlled Item Lines

In order to process serial or lot controlled items, you will need to add the tracking information for those items to the correlating container line.

To add the Serial or Lot numbers to your container line, please follow these steps:

1. Select the container line you want to add tracking information.

Lines | Manage   Line   Get Container Lines   Fewer options

	Container Line Status	Source Document Type	Source No.	Type	No.	Description	Unit of Measure Code	Qty. on Container
		Purchase	106023	Item	1896-S	ATHENS Desk	PCS	10
		Purchase	106023	Item	1900-S	PARIS Guest Chair, black	PCS	20
→		Purchase	106023	Item	1001	Serial Item	PCS	100
		Purchase	106023	Item	1000	Lot Item 1	PCS	100
		Purchase	106023	Item	1001	Serial Item	PCS	10

2. Click on the **Line** action button and then select **Container Item Tracking** from the dropdown menu to open the Container Tracking page.

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Alternatively, you can click on the **Show more actions** button on the Container line and select **Container Item Tracking**.

3. The Container Tracking Line will open, displaying the following fields: **Assigned Container Qty (Base)**, **Unassigned Container Qty (Base)**, **Assigned Tracking Qty (Base)**, and **Unassigned Tracking Qty (Base)**. Please note that tracking quantities are managed using the Base Unit of Measure quantities. Additionally, this page displays the Item Tracking for the source document in the **Source Item Tracking** list and the tracking lines to be processed in the **Container Tracking Lines** sections.

4. If you do not see any records in the **Source Item Tracking section,** click on **Source Item Tracking in the actions bar** to open the Item Tracking Lines setup for the purchase line.

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5. Select the tracking lines in the **Source Item Tracking** section and click **Add Tracking to Container** in the actions bar to assign tracking to the container line. You can use the **Select more** feature to select more than one tracking line.

6. The Container Tracking page will now be populated with either the serial or lot numbers you selected.

For Lot controlled items, you will need to update the **Quantity(Base)** field on the lines to match what is being shipped on the container. You will not need to do this for Serial controlled items.

If you have not added enough tracking quantity for the container line, you will be alerted that you have not added enough tracking quantity. Click "No" if you want to correct the issue. Click "Yes" if you will correct this later. You will not be allowed to leave the page if you have over-added tracking quantities.

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When you process the departure of the container, the added tracking information will be the serial or lot tracking used throughout the processing of the container.

Setting up Tariff and Duty

You can setup the app to calculate tariff and duty %. In order to do this, you need to make sure of the following

- The Tariff No. is specified on the item card
- The Country of Origin Code is specified on the item card

Setup Tariff and Duty %

1. Go to **Tariff Numbers**
2. Click on the line that you wish to update the Tariff/Duty % for
3. Click on **New > Tariff / Duty % Per Country of Origin**

4. Fill in the Tariff and Duty per country of origin

   Starting Date – The starting date of the Tariff/Duty. Leave blank if not applicable.

   Ending Date – The ending date of the Tariff/Duty. Leave blank if not applicable.

   Country of Origin Code – The Country of Origin that the Tariff/Duty should be calculated for. If this is left blank, then items with blank country of origin will utilize this calculation.

   Duty / Tariff % - The percentage of the Tariff / Duty

   Duty / Tariff per Unit of Measure – This is the fixed amount per unit of item that you are receiving.

Landed Cost Allocation

The user can record landed cost by clicking on the **Landed Cost Allocatio**n on the Container Document. The user can update and post purchase documents to allocate the item charges once the container has been received into inventory.

User can enter landed cost separately and specify different allocation methods, as well as different Vendors.

Item Charge Code		Item Charge Amount	Item Charge Assignment	Vendor No.	Landed Cost Document	Posted Landed Cost Document
P-FREIGHT	⋮	4,000.00	Equally	50000	_	108263
P-FREIGHT		4,000.00	Equally	50000	_	108263
DUTY		60.00	Equally	10000	_	108264
S-FREIGHT		50.00	Equally	40000	107450	_

Create purchase document from Landed Cost.

After the landed costs is entered and the container has been received into inventory:

1. Click on **Process Single Line** to only create one purchase document for the line the user is on. Click on **Process All** to create a new purchase document for each vendor.

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2. Select which **Document Type** to use when creating the Landed Cost purchase document and click **OK**.

3. New purchase documents will be created and a message with the number of new documents will pop up. Please be aware that when utilizing the 'Process All Lines' function, lines containing identical Vendor Numbers will be consolidated within the same purchase document. Any subsequent purchase documents generated for these matching Vendors will be organized into separate purchase documents.

4. Once you create, or post, your Landed Cost purchase document, you can review them by clicking on the document number in either the Landed Cost Document and Posted Landed Cost Document fields. This will display the purchase line of the corresponding document number for the Landed Cost line.

Item Charge Code		Item Charge Amount	Item Charge Assignment	Vendor No.	Landed Cost Document	Posted Landed Cost Document
→ P-FREIGHT	⋮	4,000.00	Equally	50000	_	108263

5. Next, on **Show Document** to open the Purchase Document.

Posted Purchase Invoice Lines

| ○ Search | ◎ Show Document | ⚘ Dimensions | 🎚 Item Tracking Lines | More options |

Document No. ↑	Buy-from Vendor No. ▼	Type ▼	No. ▼	Variant Code	Description
108263 ⋮	50000	Charge (Item)	P-FREIGHT		Misc. Freight Cha

6. Once the purchase document that recorded landed cost is open, go to **Line** > **Related Information** > **Item Charge Assignment** to view the allocation.

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The landed costs have been allocated based on the allocation method specified on the Container Documents.

7. Adjust the allocation if needed. Then close the Item Charge Assignment window. On the purchase document, click on post to post the landed cost and create the posted purchase invoice.

8. Note that if you're allocating based on Tariff/Duty, you'll need to verify that the total charged by your freight forwarder matches what's calculated from the system based on the setup.

FAQ

How do I adjust the quantities on the container before receiving to the final destination?

When you receive the container, you're receiving the container based on whatever is on the BOL and the commercial invoice. There's no way to "reject" the container or update the contents of international documents at the time of receipt. If there are discrepancies, you will need to adjust the quantities at the final destination location and create your credits or claims to your overseas vendor.

Can I split a purchase line between multiple containers?

Yes! You will need to add your purchase line to the containers and adjust the quantity to match the actual container quantity.

The Duty/Tariff that my vendor charges me does not match what's calculated.

If the Duty/Tariff charged does not match what's calculated based on the setup, you will need to double check with your vendor on what is the duty/tariff that is charged for the container. Match that up against what's setup on the item and ensure the calculation matches. If there are discrepancies, you will need to manually resolve this with the vendor or adjust the duty/tariff calculation described above.

I cannot find the 'Create Item Charge Invoice' and 'Add Item Charge to existing Purchase Doc.' buttons in the Posted Container Actions.

Since Version 1.5.1.0 these actions have been deprecated. Two new actions have been added to the Landed Cost page. This will be where you can now Process Single and All Item charges, depending on your needs. You can access this page by clicking on 'Landed Cost Allocation' on the Container or Posted Container page.

When am I able to create my Landed Cost Allocation purchase documents? I need to invoice my freight charges!

As soon as you receive the container lines into inventory, you can create and post your landed cost charges. If you are using the 'On the Water' location, you can begin processing these charges once you mark the container as 'Departed.' However, if you are not using the 'On the Water' location, you won't be able to process your Landed Cost charges until you transfer the container to your final location and post it.

How do I switch from the Stripe subscription to the Microsoft Licensing subscription.

Follow the steps listed in the Creating Subscription section to purchase and assign your licenses. Once you have done that, please reach out to support@apcommerce.com to ensure that your original subscription is cancelled.

Will updating the Expected Receipt Date on the Container update the Expected Receipt Date on the Purchase Order?

Yes, the Expected Receipt Date on the Purchase Order will be updated anytime you change the Expected Receipt Date on the Container. Additionally, Transfer Orders created by processing the Departure of containers using the On the Water location will have the Receipt Date updated as well.

How do I prevent transfer lines created during the departure processing from being suggested during MRP?

Update the **Default Planning Flexibility** on the Freight Container Receiving Management Setup page from **No Change** to **None** before processing your departure. If you already have a transfer order, you can personalize the Transfer Order subform to show the Planning Flexibility field and update the field to be set to **None**.

We have processed our Departure and realized we had the wrong quantity on the Container line, what do I do?

If the container line is in the Departed Status, you can run the Undo Departure process. See the section on the Undo Departure in the "WITH On the Water Location" and "WITHOUT On the Water Location" sections for details.

Is there a free trial so I can test the app before committing to purchasing licenses?

Yes! We have a Free Test user license that can be "purchased" by following the steps in the Creating a Subscription section. You will need to select the option for the Free Test user when selecting a plan. This plan can only be used in a Sandbox environment and the associated permission set cannot be assigned to a user in a Production environment.