



User Guide

Inbound Container Handling

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1. ABOUT



The Inbound Container Handling app allows you to manage and track shipping containers in Microsoft Dynamics 365 Business Central. Optimize inbound logistics and improve receiving process with the application. The Inbound Container Handling app supports all native Business Central purchasing functions.

- Copilot compatible: Boost productivity with enhanced AI-assisted features.
- To learn more, visit the following link for more information:
<https://www.websan.com/inbound-container-handling>
- Implementation questionnaire can be accessed here:
<https://form.jotform.com/dkote/inbound-container-questionnaire>

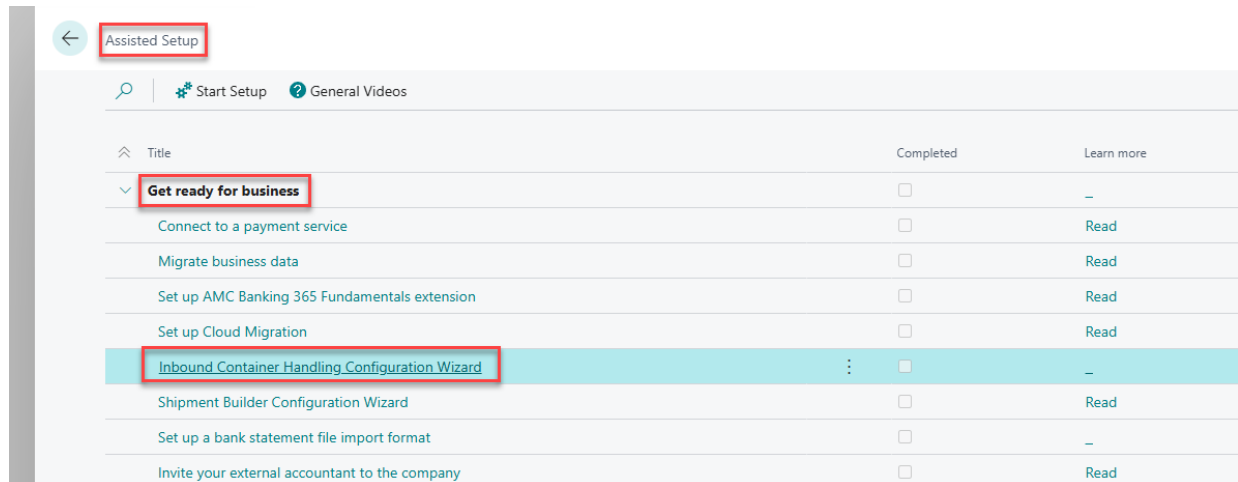
2. BASIC SETUP

This section covers the basic system setup needed to use the Inbound Container Handling application. These steps should be completed prior to using the app.

Onboarding Wizard

To configure the application using a guided step-by-step wizard:

1. Use the magnifying glass tool to go to the Assisted Setup window.
2. In the Assisted Setup window, go to the section “Get ready for business”, and select the Inbound Container Handling Wizard.



The Inbound Container Handling Configuration wizard will guide you through the installation steps of the application, including:

1. Submitting your client information to WebSan (go to the Registration section of this document for more details)
2. Verifying that you have a valid license to start using the application (go to the Registration section of this document for more details)
3. Assigning user permissions (go to the Permissions section of this document for more details)
4. User Defined Field (UDF) Assignments
5. General Receipt settings

6. General Posting Document settings

A demo tutorial video recording is available at the end of the Wizard.

Manual Container Setup

To manually set up the Inbound Container Handling app, in Dynamics 365 Business Central, navigate to the Container Setup page. In the Container Setup window, complete the setup of the application as needed.

Overview

The configuration settings in this section include:

Overview	
Container Nos.	WSICONTAINER
Default Destination Location	MAIN
Default Size UOM	Meter
Disallow Adding Non-Inventoried Items	<input checked="" type="checkbox"/>
Allow Adding G/L Account Type	<input type="checkbox"/>
Can Assign Released Purchase Order	<input checked="" type="checkbox"/>
Can Only Assign Released Order	<input type="checkbox"/>
Can Edit Gross Weight	<input checked="" type="checkbox"/>
Can Edit Total Cubage	<input checked="" type="checkbox"/>
Allow Undo Receipt	<input checked="" type="checkbox"/>
Override Document No.	<input checked="" type="checkbox"/>
Override Transfer Shipment Document No.	<input checked="" type="checkbox"/>
Use Default Counter as ID	<input checked="" type="checkbox"/>
Allow Vendor Restriction	<input type="checkbox"/>
Event Logging	<input type="checkbox"/>
Use Container ID numbering for Posted Purchase L... ..	<input checked="" type="checkbox"/>

- Container Nos. (dropdown): Specifies the number series code used to assign numbers to Container.
- Default Destination Location (dropdown): Default destination location for Container
- Default Size UOM (dropdown): The default Size UOM of Container Type on Container Card.
- Disallow Adding Non-Inventoried Items (toggle): By activating, non-inventoried items on Purchase Order line will not be able to be added to Container.
- Allow Adding G/L Account Type (toggle): By activating, G/L Account type line can be added to container
- Can Assign Released Purchase Order (toggle): Determines if PO lines that can be assigned to a container are limited to those in Open status or Released status.

- Can Only Assign Released Order (toggle): Determines if PO lines that can be assigned to a container are limited to those in Open status or Released status.
- Can Edit Gross Weight (toggle): Allows users to override the gross weight value which is otherwise automatically calculated based on items assigned to the container.
- Can Edit Total Cubage (toggle): Allows users to override the item volume value which is otherwise automatically calculated based on items assigned to the container.
- Allow Undo Receipt (toggle): Allows users to override the item volume value which is otherwise automatically calculated based on items assigned to the container.
- Override Document No. (toggle): Allows users to override the item volume value which is otherwise automatically calculated based on items assigned to the container.
- Override Transfer Shipment Document No. (toggle): Overrides the document number on the Transfer Shipment documents made by the app to be Container No with a "-X".
- Use Default Counter as ID (toggle): This will automatically assigns a counter as the ID to any new containers that are created.
- Allow Vendor Restriction (toggle): This will limit the vendor with the selected value in the Vendor ID field. Purchase Orders that will be created or added will be limited to that vendor selection only.
- Event Logging (toggle): When toggled on, the Event Log button will be shown in Container List and Container Card, this will log the actions done on the container.
- User Container Id numbering for posted Purchase Invoice (toggle): Posted Purchase Invoice will have a Posted Purchase Invoice No. with Container numbering format <ContainerID>-PPI.

Receiving

Receiving	
Default In-Transit Location	OTW
Disable Edit Qty Receive	<input type="radio"/>
Disable Backorder Unreceived Quantities	<input type="radio"/>
Unassign Back Order Items	<input type="radio"/>
Allow Over Receiving	<input checked="" type="checkbox"/>
Disable Job Consumption upon Receiving	<input type="radio"/>
Allow Editing Quantities After FOB Receipt	<input checked="" type="checkbox"/>
Disable In-Transit (FOB) Receiving	<input type="radio"/>
Disable Standard Receipt	<input checked="" type="checkbox"/>
Override PO Document Date	<input checked="" type="checkbox"/>
Override Receipt Date	<input checked="" type="checkbox"/>
Default Receipt Date	Scheduled Receipt Date
Allow Undo Receipt on Container	<input checked="" type="checkbox"/>
Use Container Dest. Location in Purchase Invoice	<input type="radio"/>
Create Multiple Invoices for Charge Items	<input checked="" type="checkbox"/>

The configuration settings in this section include:

- **Default In-Transit Location (dropdown):** It is recommended that a unique location be created to store goods being maintained as in-transit on a container. Users should not input a traditional in-transit location within this field as this location is treated as a regular location such that goods will display within company inventory.
- **Disable Edit Qty. Receive (toggle):** By activating, users will not be able to edit the quantity to receive value on the PO line. This will force users to always receive the entire PO line.
- **Disable Backorder Unreceived Quantities (toggle):** By activating, any unreceived quantities on the PO line will not be able to be attached to another container. When disabled (recommended), amounts on the PO line that are unreceived will be cleared from the PO line assigned to the container and moved to a new PO line such that they can be received on another container. When using this function, the PO value never changes, however, some lines may split and new lines created. Note: This is used in conjunction with the "Disable Edit Qty Receive" setting.
- **Unassign Back Order Items (toggle):** When enabled, any backorder quantity for the received PO lines will not be added to a new container.
- **Allow Over Receiving (toggle):** Please ensure you have setup an over-receipt code on the necessary item or vendor records. Note: The container app will NOT create a workflow for approval of over-receipt.
- **Disable Job Consumption upon Receiving (toggle):** By disabling Job Consumption upon Receiving, Negative Adjustment will not be created for any FOB receive with Job in Purch Line
- **Allow Editing Quantities After FOB Receipt (toggle):** Allow Editing Quantity After FOB Receipt. The edited quantity will be used to create Transfer Order. This feature is not supported with EDI.
- **Disable In-Transit (FOB) Receiving (toggle):** This will disallow users to process an in-transit receipt. If activated, users will need to fully receive goods to their final destination.

- **Disable Standard Receipt (toggle):** This will disallow the standard receipt in container card. if activated, user will not be able to do standard receipt in container card.
- **Override PO Document Date (toggle):** Temporarily sets the PO Document Date value to the current date when receiving container.
- **Override Receipt Date (toggle):** Allow users to set the posting date as the transaction is being processed.
- **Default Receipt Date (dropdown):** Defaults the value in the selection window when users are selecting the posting date for transactions however it can be altered. When the user is manually setting the date, values plus or minus 90 days from the current date will not be accepted.
- **Allow Undo Receipt on Container (toggle):** When enabled, the Undo Receipt button at the top of the container card will be enabled. All Posted Purchase Receipts in the container can be undone on click of the button. The Container ID will not be removed from the PO line.
- **User Container Dest. Location in Purchase Invoice (toggle):** When toggled ON, the created Purchase Invoice/s from charge item/s in the container will use the Dest. Location Code value from the Container Card. When toggled OFF, the location to be used will be the Default Destination Location from the Container Setup value.
- **Create Multiple Invoices for Charge Items (toggle):** When toggled ON, the system will allow multiple invoices to be created at different times for charge items in the container.

Transfers

The configuration settings in this section include:

- **Allow Multiple Transfer Receipts (toggle):** After a container is received, users are able to complete a transfer receipt to move goods to another location. This setting allows users to complete multiple transfer receipt entries.
- **Disable Transfer Posting (toggle):** By disabling transfer posting, any transfer receipt that is processed to move goods to another location will not be automatically posted when

they are processed. Instead, transactions will be created and users will need to manually post the transactions.

- Create Transfer Receipt Upon FOB Receipt (toggle): By disabling transfer posting, any transfer receipt that is processed to move goods to another location will not be automatically posted when they are processed. Instead, transactions will be created and users will need to manually post the transactions.
- Post Transfer Shipment (toggle): Post Transfer Shipment but not Warehouse Receipt if Create Transfer Receipt upon FOB Receipt is off and is warehouse location.
- Create Transfer Based on Prev Location (toggle): Created multiple Transfer Orders based on the previous location code on Purchase Order Line
- Use Transfer Route (toggle): When enabled, if a Transfer Route exists, the Container app will not use the Default WMS Transition Code.
- Create Multi Put-aways for Partial WH Receiving (toggle): When enabled, if a Transfer Route exists, the Container app will not use the Default WMS Transition Code.

Warehousing

The configuration settings in this section include:

- WMS Transition Code (dropdown): The In-Transit Code on Transfer Order when destination is a warehouse location.
- Disable Register Warehouse Put-away (toggle): Put-away will not be auto registered on auto posting of warehouse receipt from Container.

Labels

The configuration settings in this section include:

- UDF Text # Label – Display name for user definable field. Populating this value will enable the field.
- UDF Date # Label – Display name for user definable field. Populating this value will enable the field.

- UDF Toggle # Label – Display name for user definable field. Populating this value will enable the field.

Transport Mode

Transportation Mode Code and their respective descriptions can be created, deleted, and updated in this section. Default modes include Sea, Rail, Road, Air, and Multiple.

Transport Mode

Transport Mode ▾

Transport Mode Code ↑		Transport Mode Description	
→		⋮	Blank default value
	SEA		Transport Mode by Sea
	RAIL		Transport Mode by Rail
	ROAD		Transport Mode by Road
	AIR		Transport Mode by Air
	MULTIPLE		Multiple Transport Mode

Locations Setup

To set up a warehouse, search for Locations. From the Locations List, select the location you wish to set up as a Warehouse. In the Location Card, scroll down to the Warehouse section.

Note that the Require Receive, Require Put-away and Require Pick toggles are settings read by the Container Setup and utilized by the Inbound Container Handling app.

Location Card

WAREHOUSE · Warehouse require putaway and pick

Zones Bins Inventory Posting Setup Warehouse Employees Online Map Dimensions ...

Address & Contact >

Warehouse

Require Receive ☒

Require Shipment ☐

Require Put-away ☒

Use Put-away Works... ☐

Require Pick ☒

Default Bin Selection ...

Outbound Whse. Ha... ..

Inbound Whse. Hand... ..

Base Calendar Code ...

Customized Calendar ... No

3. FUNCTIONALITY

The Inbound Container Handling app allows users to mass update and receive purchase orders assigned to containers, process FOB receipts, auto-allocate landed costs to goods in containers, etc.

Creating a New Container

To create a new container, using the global search tool (magnifying glass) searching for Container List.

In the Container List window, select New. A new Container Card will open.

Container List 🔖 📄 ↺

Search + New Manage Purchase Order Qty Edit Log | More options 🔗 🔍 ☰

Container ID ↑	Description	Status	Cost	Receipt Cost	Scheduled Receipt Date	Date Left Port	Tracking Number	Vessel	Agent	Dest Location Code
10001	SAMPLE CO...	ON THE WATER	2,231.70	2,231.70	5/18/2022	5/13/2022	ABCDEFG	SS SHIPMENT	DHL	EAST

Note:

1. In addition to creating new containers, users can also view, edit, and delete existing containers (actions found under the Manage menu).
2. The Container List page can be updated via Personalization to add any of the reporting fields found in the Container Card.
3. The PO Qty Edit Log button shows a log of the quantity updates that have been applied to Purchase Orders linked to containers.

Entering a Container's Basic Information

From the Container Card, users can add Purchase Order Lines to Containers (i.e., link PO Lines to Containers), manage different types of receipts – including Standard, FOB, and Transfer Receipts – generate Charge Item entries, and create and post Invoices for those Charge Items.

The Container Card also allows users to track Landed Costs accrued by the Container, as calculated by the Landed Costs Validator app from WebSan Solutions Inc.

To begin configuring of a Container, navigate to the Overview, Finance, Dates, Tracking, Partner, and Capacity FastTabs on the Container Card. These sections contain all the necessary fields to properly set up a container, including the following: Container ID, Scheduled Receipt Date, Container Type, and more.

Overview

Overview			
Container ID	C00000019	Total Receipt Cost	2,345.40
Previous Container No.		Total Cost	4,345.40
Alternate ID		FOB Received	<input checked="" type="checkbox"/>
Description	DEMO16	Received at Destination	<input checked="" type="checkbox"/>
Status	RECEIVED	Handled By 3PL	<input type="checkbox"/>
Total Purchase Value	0.00	Receipt Validation Status	No Errors Found

To begin, enter a Container ID, along with a relevant Description and, if needed, an Alternate ID. When a Container Card is first created, its status (see Status field) is automatically set to New. As transactions are processed against the Purchase Orders loaded into the Container, the status will update automatically to FOB Received and then to Received. Users can also manually update the Container status to other options—Loaded, In Customs, Delayed, or Closed—by selecting from the Status drop-down list.

The following reporting fields in the Overview section are updated automatically as transactions are recorded:

- **Total Purchase Value:** The total value of all purchase order lines assigned to the container.
- **Total Receipt Cost:** The total value of all purchase receipt lines linked to the container.
- **Total Cost:** The combined cost of all received goods plus any assigned charge items.

The toggles FOB Received, Received at Destination, and Handled by 3PL (the latter updated only by EDI365) are also updated automatically as related transactions are posted. The Receipt Validation Status field indicates the status of the receipt process following the posting of the Purchase Order; in case a validation error is found, it will display a notification message altering the user.

Finance

Finance			
Estimated Freight	<input type="text" value="1,800.00"/>	Total Receipt Cost	<input type="text" value="2,345.40"/>
Currency	<input type="text" value="CAD"/>	Total Cost	<input type="text" value="4,345.40"/>
Total Purchase Value	<input type="text" value="0.00"/>		

Completing the Finance section is optional and intended for reporting purposes only. It allows users to track the following: Estimated Freight Cost, Total Purchase Value, Total Receipt cost, and the Total Cost of the container.

Dates

Dates			
Scheduled Receipt Date	<input type="text" value="7/5/2025"/>	Date Left Port	<input type="text" value="5/25/2025"/>
FOB Receipt Date	<input type="text" value="5/30/2025"/>	Expected Date of Arrival at Port	<input type="text" value="5/31/2025"/>
Destination Receipt Date	<input type="text" value="5/30/2025"/>	TEST DATE UDF	<input type="text" value="6/4/2025"/>

In the Dates section, click the calendar icon next to the Scheduled Receipt Date to select when the container is expected to arrive. This will automatically update the Scheduled Receipt date on all PO lines linked to the container. If the date is changed after PO lines are loaded, their Scheduled Receipt Dates will update to match the date on the Container Card.

FOB Receipt Date and Destination Receipt Date are system-generated and cannot be manually edited. These fields are populated automatically when a Container Receipt and/or Transfer is posted.

Additional fields such as Date Left Port, Expected Date of Arrival at Port and up to five User Defined Fields (UDFs) are available. To modify the number of UDF date fields, refer to the Basic Setup section of this user guide.

Tracking

Tracking			
Dest. Location Code	<input type="text" value="MAIN"/>	Customs/Duty	<input type="text"/>
In-Transit Location	<input type="text" value="OTW"/>	Bill of Lading	<input type="text"/>
Next Transfer Location	<input type="text"/>	Manifest Number	<input type="text"/>
Port Of Origin	<input type="text"/>	Bill Number	<input type="text"/>
Port Of Entry	<input type="text"/>	Primary Attribute	<input type="text"/>
Tracking Number	<input type="text" value="123456789012"/>	Receipt Time	<input type="text"/>
Seal Number	<input type="text"/>	Receiver	<input type="text"/>
Insurance Confirmation	<input type="text"/>	Transport Mode	<input type="text"/>
Shipment Method Code	<input type="text"/>	TEST TEXT UDF	<input type="text"/>
INCO Terms	<input type="text"/>	TEST TOGGLE UDF	<input type="checkbox"/>

In the Tracking section, expand the Dest. Location Code drop-down list to select the intended *final* destination of goods. Like the Expected Receipt Date field, the Destination Location Code

assigned to the Container Card will be automatically assigned to the Location Code of the PO lines linked to the container. The In-Transit Location field will default to the Default In-Transit Location specified during the app's basic setup – refer to the Basic Setup section of the present user guide for more details. To update the In-Transit Location of a specific container, in the Container Card, expand the field's drop-down list and select an option. The Next Transfer Location field is used when multi-transfer is enabled (see Basic Setup). Note that this field cannot match the Dest. Location or the In-Transit Location fields. Additional fields are available for reporting purposes, i.e., Tracking Number, Seal Number, INCO Terms etc.

Partner

Partner			
Vessel	123456789	Vendor ID	20000
Agent	POSTALMAIL	Vendor Name	First Up Consultants
Carrier		Forwarder	

In the Partner section, users have the option to enter details such as Vessel identifier, Agent, and Carrier. This information is used exclusively for reporting purposes.

Capacity

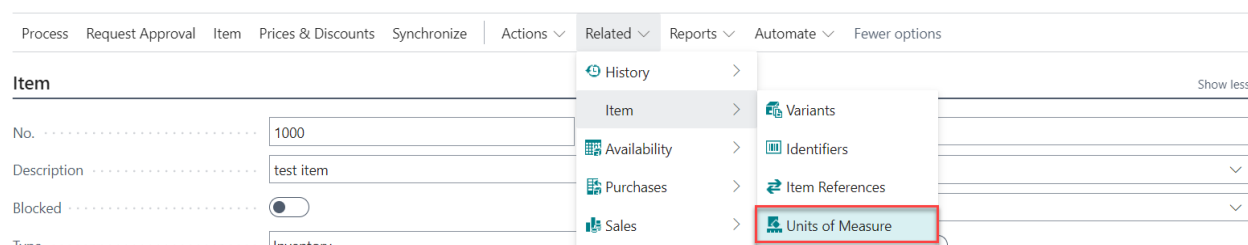
Capacity			
Container Type	40FT	Weight UOM	KG
Size UOM	Meter	Total Cartons	0.00
Length	12.18	Tare Weight	3,750.00
Width	2.44	Gross Weight	3,750.00
Height	2.59	Max Weight	30,400.00
Total CBM	0.00	Weight Percentage Full	12.34%
CBM Percentage Full	0.00%		

In the Capacity section, expand the Container Type drop-down list and choose an option. Based on the type of container selected, the capacity fields (Length, Gross Weight, Etc.) found in this section will auto-populate. Users can set the Size UOM to meters or feet and the Weight UOM to kilograms or pounds.

Height	2.90	Max Weight	30,480.00
Total CBM	80.10	Weight Percentage Full	15.12%
CBM Percentage Full	92.94%		

Note that as products are loaded into the container, the CBM Percentage Full and Weight Percentage Full will update automatically. When the CBM/Weight Percentage Full indicators reach 90%, the fields will turn red to alert users that the container is reaching its maximum capacity. Capacity calculation is a function of the item weight divided by volume times the quantity of that item. It does not factor in packaging or packaging within the container. Item volume is read from the Item Units of Measure card.

Item volume is read from the Item Units of Measure card. To access your Item Unit of Measure Card, open your Item Card. Select Related > Item > Units of Measure.

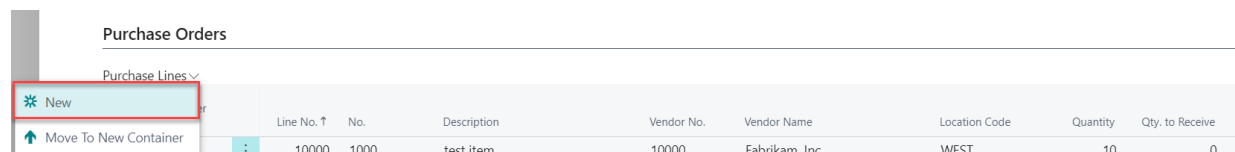


Adding Purchase Order Lines

Once all the required fields and desired reporting fields found in the Overview, Finance, Dates, Tracking, Partner, and Capacity sections have been populated, users can begin loading Purchase Orders to the container, that is, linking PO lines to specific containers.

To add a new Purchase Order Line, from the Container Card:

1. Scroll down to the Purchase Order section, then click the Purchase Lines subheading and select New.



2. The View – Purchase Orders window that appears shows a list of the Purchase Orders that have not been assigned to a container and that are Open or Released. Here users may choose to:
 - a. Simultaneously assign multiple Purchase Orders to a container. To perform a PO mass assignment, press and hold the CONTROL key and select all the POs that

will be added to the container. Then, expand the Process menu, and select Assign to Container.

Note that the above will add all the lines found in the selected POs to the container.

View - Purchase Orders

Search + New Manage Process Release Posting Print/Send Order Actions Related SmartList Fewer options									
Create Whse. Receipt Send IC Purchase Order Assign to Container									
✓	106349	30000	Graphic Design Institute	WebSan AAD Application	11/29/2022	Open	1,350.00	1,350.00	
✓	106348	40000	Wide World Importers	Oscar CuevaBravo	11/21/2022	Open	10.00	11.20	
✓	106347	10000	Fabrikam, Inc.	Oscar CuevaBravo	11/21/2022	Released	2,231.70	2,231.70	
✓	106316	10000	Fabrikam, Inc.	Adam Macintosh	9/8/2022	Released	2,231.70	2,231.70	
✓	106315	10000	Fabrikam, Inc.	Adam Macintosh	9/8/2022	Released	2,000.00	2,260.00	
✓	106314	10000	Fabrikam, Inc.	Chuyao Li EAST	9/8/2022	Released	2,246.50	2,538.55	

- b. Assign lines from a *single* Purchase Order. This method is an alternative to simultaneous assignment (explained in the previous point), which assigns all lines from *multiple* POs to a container at once. While all assignments are technically performed at the line level, assigning a container at the PO header level automatically brings all the lines from that PO. However, lines can also be assigned individually to different containers if needed.

View - Purchase Orders

Search + New Manage Process Release Posting Print/Send Order ...					
No. ↓	Buy-from Vendor No.	Buy-from Vendor Name	Vendor Authorizati... No.	Created By	Location Code
106337	10000	Fabrikam, Inc.		Oscar CuevaBravo	
106316	10000	Fabrikam, Inc.		Adam Macintosh	
106315	10000	Fabrikam, Inc.		Adam Macintosh	

To assign a single PO, being by selecting the PO number from the list. This will open the Purchase Order Card. In the General section, expand the Container ID drop-down menu and locate the appropriate container. Once selected, return to the Container Card – you will see that all PO lines have been added to the container automatically.

106343 · Fabrikam, Inc.

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

General Show more

Vendor Name Fabrikam, Inc. Status Open

Contact Krystal York Project No.

Document Date 11/21/2022 Purchase Receipt Posting Received Not Invoiced

Vendor Invoice No. 78963 Container ID UM-0001

Vendor Shipment No. Contract No.

Created By Oscar CuevaBravo

Lines Manage Line Functions Order Fewer options

Type	No.	Proj...	Item Refe...	GST...	Description	Locat...	Bin Code	Quantity	Det...
→ Item	1000				test item	MAIN		35	

Container ID ↑ Description Status

NEW - A1Z2 A1Z2 NEW

NEW - ASCCXC ADSFDS NEW

NEW - S002 SUMMIT 002 NEW

NEW - S003 SUMMIT 003 NEW

NEW - UM-001 NEW

→ UM-0001 UG NEW

+ New Select from full list

Note (Line-level assignment): Alternatively, users can assign individual PO lines from the same Purchase Order to different containers. To do this, navigate to the Lines grid and scroll to the right until you find the Container ID column. Click the drop-down arrow in the relevant row to choose a container for that specific line.

Vendor Invoice No. 111 Container ID NEW - UM-001

Vendor Shipment No. Contract No.

Created By Oscar CuevaBravo

Lines Manage Line Functions Order Fewer options

Type	Country Code	Province Code	Project Code	Cost Type	Work Type Code	Attach...	Over-Receipt Quantity	Over-Receipt Code	Container ID	Prev Location Code	T4A Liab	Contract No.
→ Item						No	0		NEW - UM-001	MAIN	<input type="checkbox"/>	
→ Item						No	0		MAIN	MAIN	<input type="checkbox"/>	

Container ID ↑ Description Status

NEW - S002 SUMMIT 002 NEW

NEW - S003 SUMMIT 003 NEW

NEW - UM-001 TEST NEW

UM-001 SAMPLE CONTAINER NEW

WEBINAR WEBINAR DEMO ON THE WATER

+ New Select from full list

Subtotal Excl. VAT (CAD) 2,235.00

Inv. Discount Amount (CAD) 268.20

Invoice Discount % 2,503.20

c. Create a new Purchase Order. To create a new PO, select New.

View - Purchase Orders

Search + New Manage Process Release Posting Print/Send Order ...

No. ↑	Buy-from Vendor No.	Buy-from Vendor Name	Vendor Authorizati... No.	Created By	Location Code
106002	20000	First Up Consultants			

A new Purchase Order Card will open; populate fields as for any standard PO.
Expand the Container ID drop-down list and select your container. Go back to the Container Card. Here you will find that your PO lines have been added.

Vendor Invoice No. 7391
Vendor Shipment No.
Created By Oscar CuevaBravo

Container ID
Contract No.

Container ID ↑	Description	Status
NEW - ASCCXC	ADSFDS	NEW
NEW - S002	SUMMIT 002	NEW
NEW - S003	SUMMIT 003	NEW
NEW - UM-001		NEW
UM-0001	UG	NEW

+ New Select from full list

Type	No.	Proj...	Item Refe...	GST...	Description	Locat...	Bin Code	Quantity	Det...
Item	1906-S				ATHENS Mobil...			10	
Item	1908-S				LONDON Swiv...			30	

From the View – Purchase Orders window, users can perform various Purchase Order management tasks that include view, edit, or delete. Users may also release or reopen, post, and print Purchase Orders.

View - Purchase Orders

Search + New Manage Process Release Posting Print/Send Order ...

No. ↓	Buy-from Vendor No.	Buy-from Vendor Name	Vendor Authorizati... No.	Created By	Location Code
106339	10000	Fabrikam, Inc.		Oscar CuevaBravo	

After all the needed PO lines have been added to the container, users can go to the Purchase Orders section of the Container Card to see a list of such lines.

Purchase Orders

Purchase Lines

Purchase Order No. ↑	Line No. ↑	No.	Description	Vendor No.	Vendor Name	Location Code	Quantity	Qty. to Receive
→ 106343		10000	test.item	10000	Fabrikam, Inc.	MAIN	35	35
106344		10000	1906-S ATHENS Mobile Pedestal	40000	Wide World Importers	MAIN	10	10
106344		20000	1908-S LONDON Swivel Chair, blue	40000	Wide World Importers	MAIN	30	30

Clicking the Purchase Lines sub-header, users have the option to move PO lines to a different container (new or previously existing), view or edit the serial and lot number of the PO line(s) selected, manage the landed costs to be accrued by the container at the time of receipt, and open a report of the container's PO lines in Excel.







Purchase Orders										
Purchase Lines										
	Line No. ↑	Type	No.	Description	Vendor No.	Vendor Name	Location Code	Quantity	Qty. to Receive	
	10000	Item	1900-S	PARIS Guest Chair, black	10000	Fabrikam, Inc.	OTW	2	0	
	20000	Item	1906-S	ATHENS Mobile Pedestal	10000	Fabrikam, Inc.	OTW	5	0	

Performing Standard Receipts

Standard receipts allow users to receive all goods on the container. To perform a standard receiving, scroll up to the top of the Container Card and click on the Standard Receipt.

Container Card

C00000024X

 Standard Receipt
  FOB Receipt
  Transfer Receipt
  Create Purchase Invoice
  Undo Purchase Receipts
  Print
 More options







The native Business Central receiving window will appear. Select the option that best fits your business process and click Ok to continue.

☒ Receive
☐ Invoice
☐ Receive and Invoice

Confirm the receipt will populate the Posted Purchase Receipts section. If the Container is shipped to a warehouse location, and that the Required Put-away and Require Pick toggles (found in the Location Card) are activated, the Posted Warehouse Receipts and Registered Put-away sections of the Container Card will populate as well.

Container Card

C00000016

 Standard Receipt
  FOB Receipt
  Transfer Receipt
  Create Purchase Invoice
  Undo Purchase Receipts
  Print
 More options

Posted Warehouse Receipts

Posted Warehouse Receipt Lines

Warehouse Receipt No. ↑	Line No. ↑	Due Date	Item No.	Description	Quantity	Unit of Measure Code
→ C00000016-W	10000	5/31/2025	1906-S	ATHENS Desk	2	PCS

Registered Put-away

Registered Put-away Lines

Registered Put-away No. ↑	Source Document	Action Type	Line No. ↑	Due Date	Item No.	Description	Quantity	Unit of Measure Code
→ C00000016-RP	Inbound Transfer		10000	5/31/2025	1906-S	ATHENS Desk	2	PCS



Creating Purchase Charge Invoices

The Purchase Charge Invoices section allows users to reflect the freight/landed costs of inbound containers, generate invoices, and maintain a centralized view of all various costs associated with a container. To add Purchase Charge Invoice Lines, users must:

1. Go to the Purchase Charge Invoices section of the Container Card. Then, expand the Purchase Charge Invoice Lines sub-header and select Purchase Invoice List.






Purchase Charge Invoices

Purchase Charge Invoice Lines ▾

 Purchase Invoice List	Item No. ↑	Description	Vendor No.	Vendor Name	Location Code	Quantity	Direct Unit Cost Excl. VAT	Li
 Open in Excel	(There is nothing to show in this view)							

2. In the View – Purchase Invoices list window that appears, select New.

View - Purchase Invoices

 Search	 New	Manage	Release	Posting	Invoice	More options	  
No. ↑	Buy-from Vendor No.	Buy-from Vendor Name	Vendor Invoice No.	Created By	Location Code		
107211	30000	Graphic Design Institute	107211				

3. A new Purchase Invoice window will appear. Populate the Invoice fields as necessary. Select a charge item type, which typically represents freight.

General Show more

Vendor Name	Fabrikam, Inc.	Created By	Oscar CuevaBravo
Contact	Krystal York	Status	Open
Post		Project No.	
Due		Contract No.	
Ven			
Line			

Option Values

G/L Account

Item

Resource

Fixed Asset

→ Charge (Item)

Select from full list

→ Charge (Item)	*								
-----------------	---	--	--	--	--	--	--	--	--

4. Next, select Qty. to Assign. This will open the Edit – Item Charge Assignment (Purch) window. Select the Get Receipt Lines button.

Edit - Item Charge Assignment (Purch)



Manage Suggest Item Charge Assignment...

Get Receipt Lines

Get Sales Shipment Lines ...

Applies-to
Doc. TypeApplies-to
Doc. No.Applies-to
Doc. Line No.

Item No.

Description

Qty. to Assign

Qty. to H

5. Search for your Container ID and select the PO lines that were added to the Container Card.

Purch. Receipt Lines



UM-0001



Document No. ↓	Buy-from Vendor No.	Type	No.	Description	Container ID	Location Co
—	40000	Item	1908-S	LONDON Swivel Chair, blue	UM-0001	MAIN
107365	40000	Item	1906-S	ATHENS Mobile Pedestal	UM-0001	MAIN
→ 107364	: 10000	Item	1000	test item	UM-0001	MAIN

6. Enter a Qty. to Assign for each PO Line and select Close.

Applies-to Doc. Type	Applies-to Doc. No.	Applies-to Doc. Line No.	Item No.	Description	Qty. to Assign	Qty. to H
Receipt	107364	10000	1000	test item	1	
Receipt	107365	10000	1906-S	ATHENS Mobile Pedestal	1	
→ Receipt	: 107365	20000	1908-S	LONDON Swivel Chair, blue	1	

Note: Purchase Orders must have been received before they can be assigned to an invoice.

7. Post your Purchase Invoice.

Purchase Invoice



✓ Saved



108244 · Fabrikam, Inc.

Process **Posting** Release Prepare Request Approval Invoice More options

Post



Preview Posting



Post and New...



Post and Print



Post Batch...



The Purchase Invoice will be reflected in the Purchase Charge Invoices and Posted Purchase Receipts sections of the Container Card.

Performing FOB Receipts

In shipping and logistics, FOB (Free on Board) refers to the point at which ownership of goods transfers from the seller to the buyer. By performing an FOB receipt, the recipient assumes legal ownership of the goods while they are still in transit — typically once the container has been loaded onto a vessel at the port of shipment. This action records that the goods are now the buyer's responsibility, even though they have not yet arrived at their final destination.

To perform In-Transit receiving:

1. Using a Container Card that has been set up and is ready for the receipt of a container, select FOB Receipt.

Container Card ✎ ↗ + 🗑

C00000024X

📄 Standard Receipt
📄 FOB Receipt
➡ Transfer Receipt
📄 Create Purchase Invoice
↶ Undo Purchase Receipts
🖨 Print
More options

2. Select the option that fits best your business process and click Ok to continue.

i

☒ Receive

☐ Invoice

☐ Receive and Invoice

OK
Cancel

3. Although the Destination Location Code for this Container is MAIN, the location WEST appears in the Posted Purchase Receipts Lines because the In-Transit Location for this container has been set to WEST.

Purchase Orders

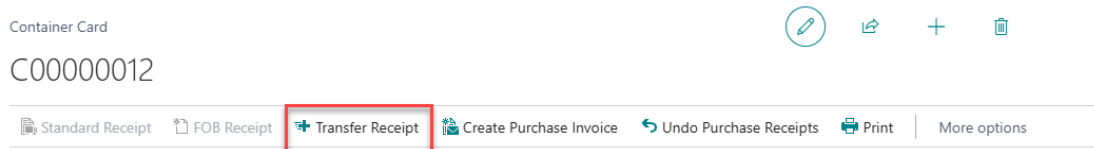
Purchase Lines ▾									
Purchase Order No. ↑	Line No. ↑	No.	Description	Vendor No.	Vendor Name	Location Code	Quantity	Qty. to Receive	
→ 106345	10000	1000	test.item	10000	Fabrikam, Inc.	WEST	10	0	

Posted Purchase Receipts

Posted Purchase Receipt Lines ▾									
Purchase Receipt No. ↑	Line No. ↑	No.	Description	Order No.	Vendor No.	Vendor Name	Location Code	Quantity	
→ 107367	10000	1000	test item	106345	10000	Fabrikam, Inc.	WEST	10	

To learn how to change the default In-Transit Location, refer to the Basic Setup section of the present user guide.

- When the company is ready to receive the container to its final destination, select the Transfer Receipt button located at the top of the Container Card.



- In the Posted Transfer Receipts section of the Container Card, you will notice that the container was transferred from its WEST In-Transit Location to its MAIN (final) Destination Location.

Posted Transfer Receipts

Posted Transfer Receipt Lines ▾

Transfer Receipt No. ↑	Line No. ↑	Item No.	Description	Transfer-from Code	Transfer-to Code	Quantity
→ 109010	:	10000	10000	test item	WEST MAIN	10

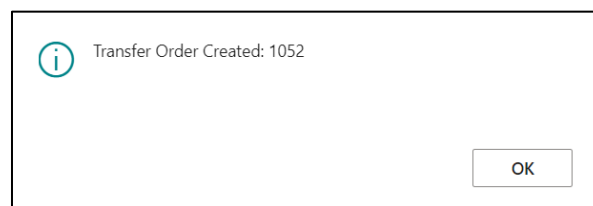
Notice that as the container is FOB received, and then received at its Destination, various fields in the Container Card will be updated automatically.

Overview

Container ID	UM-0002	Total Purchase Cost	2,231.70
Previous Container No.		Total Receipt Cost	2,231.70
Description	IN-TRANSIT RECEIVING	FOB Received	<input checked="" type="checkbox"/>
Status	RECEIVED	Received at Destination	<input checked="" type="checkbox"/>

Performing FOB Receipts with Automatic Transfer Order Document

When the toggle “Create Transfer Receipt upon FOB Receipt” is activated (option located in the Container Setup window), performing a FOB receipt will automatically create a transfer order.



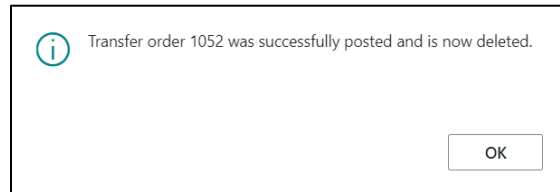
The order created can be found in the Unposted Transfer Orders section of the Container Card.

Unposted Transfer Orders

Unposted Transfer Order Lines ▾

Transfer Order No. ↑	Line No. ↑	Item No.	Description	Transfer-from Code	Transfer-to Code	Quantity
→ 1052	:	10000	1996-S ATLANTA Whiteboard, base	WEST	MAIN	1

Clicking the Transfer Receipt button will receive the container at its final destination, which will automatically post and delete the transfer order.



A transfer receipt will be generated, which can be found in the Posted Transfer Receipt section of the Container Card.

Posted Transfer Receipts

Posted Transfer Receipt Lines ▾

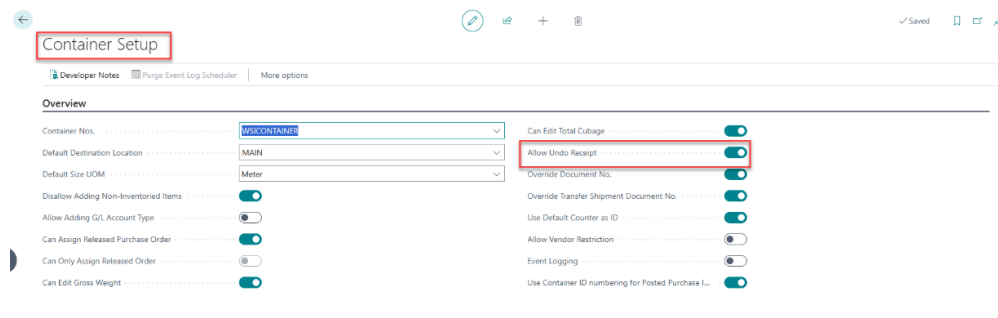
Transfer Receipt No. ↑	Line No. ↑	Item No.	Description	Transfer-from Code	Transfer-to Code	Quantity
→ 109024	:	10000	1996-S ATLANTA Whiteboard, base	WEST	MAIN	1

Undo Receipt – Non-Warehouse Location

The Undo Receipt feature of the application allows users to update orders that have been received to an in-transit location (FOB receipt) but for which a Transfer Receipt has not been created.

To undo your receipt, you will need to:

1. Ensure the Allow Undo Receipt option in the Container Setup page has been enabled.



2. Locate your Unposted Transfer Order -> go to Transfer Orders in BC.

Container Card

C00000003

Standard Receipt **FOB Receipt** + Transfer Receipt Create Purchase Invoice Undo Purchase Receipts Print More options

Purchase Orders

Purchase Lines

Purchase Order No. ↑	Line No. ↑	Type	No.	Description	Vendor No.	Vendor Name	Location Code	Quantity	Qty. to Receive	Over-Receipt Quantity	Over-Receipt Code	Quantity Received
→ 106018	10000	Item	.1826-S	ATHENS.Desk	.10000	Fabrikam, Inc.	OTW	2	0	0		2

Posted Purchase Receipts

Posted Purchase Receipt Lines

Purchase Receipt No. ↑	Line No. ↑	Type	No.	Description	Order No.	Vendor No.	Vendor Name	Location Code	Quantity	Quantity Invoiced	Expected Transfer Qty	Unit of Measure Code	Unit Cost
→ C00000003-PR	10000	Item	.1826-S	ATHENS.Desk	106018	.10000	Fabrikam, Inc.	OTW	2	0	2	PCS	1.172

Unposted Transfer Orders

Unposted Transfer Order Lines

Transfer Order No. ↑	Line No. ↑	Item No.	Description	Transfer-from Code	Transfer-to Code	Quantity	Unit of Measure Code
→ C00000003-T	10000	.1826-S	ATHENS.Desk	OTW	MAIN	2	PCS

3. Delete the Order

Transfer Order

C00000003-T

Home Prepare Print/Send Order More options

Post... Create Whse. Shipment Release Create Whse. Receipt Create Inventory Put-away/Pick...

General

Transfer-from Code OTW In-Transit Code

Transfer-to Code MAIN Posting Date 5/27/2025

Direct Transfer ☒ Status Open

Lines Manage Functions Line

New Line Delete Line Select items...

Item No.	Description	Quantity	Reserved Quantity	Inbnd.	Quantity Shipped	Qty. to Receive	Quar

This transfer was generated from a container. Are you sure you want to delete it?

Yes No

4. In the Container Card, click the Undo Purchase Receipt button.

Container Card

C00000003

Standard Receipt FOB Receipt + Transfer Receipt **Undo Purchase Receipts** Create Purchase Invoice Print More options

total Cubage weight percentage full

Cubage Percent Full 0.00%

Purchase Orders

Purchase Lines

Purchase Order No. ↑	Line No. ↑	Type	No.	Description	Vendor No.	Vendor Name	Location Code	Quantity	Qty. to Receive	Over-Receipt Quantity	Over-Receipt Code	Quantity Received
→ 106018	10000	Item	.1826-S	ATHENS.Desk	.10000	Fabrikam, Inc.	OTW	2	0	0		2

Undo Receipt – Warehouse Location

The process to undo a receipt for a warehouse location are the same to those necessary for non-warehouse location, with the exception that the Transfer Shipment must be deleted before the Transfer Order can be deleted.

To undo your receipt, you will need to:

1. Ensure the Allow Undo Receipt option in the Container Setup page has been enabled.

The screenshot shows the 'Container Setup' page. The title 'Container Setup' is highlighted with a red box. Below the title, there are several settings. The 'Allow Undo Receipt' toggle switch is highlighted with a red box and is currently turned on. Other settings include 'Can Edit Total Cubage' (turned on), 'Override Document No.' (turned on), 'Disallow Adding Non-Inventoried Items' (turned on), 'Allow Adding G/L Account Type' (turned off), 'Can Assign Released Purchase Order' (turned on), 'Can Only Assign Released Order' (turned off), 'Can Edit Gross Weight' (turned on), 'Can Edit Transfer Shipment Document No.' (turned on), 'Use Default Counter as ID' (turned on), 'Allow Vendor Restriction' (turned off), 'Event Logging' (turned off), and 'Use Container ID numbering for Posted Purchase L...' (turned on).

2. Locate your Unposted Transfer Order -> go to Transfer Orders in BC. Open the Order.

The screenshot shows the 'Container Card' page for C00000037. The 'FOB Receipt' tab is highlighted with a red box. Below the tabs, there are three sections: 'Purchase Lines', 'Posted Purchase Receipts', and 'Unposted Transfer Orders'. The 'Purchase Lines' section shows a line for 'PARIS.Guest.Chair.black' with quantity 2. The 'Posted Purchase Receipts' section shows a receipt for the same item with quantity 2. The 'Unposted Transfer Orders' section shows a transfer order for the same item with quantity 2.

3. In the Transfer Order card, go to Order > Shipments

The screenshot shows the 'Transfer Order' card for C00000037-T0. The title 'Transfer Order' is highlighted with a red box. Below the title, there are several tabs: 'Home', 'Prepare', 'Print/Send', 'Order', 'Actions', 'Related', 'Reports', 'Automate', and 'Fewer options'. The 'Order' tab is highlighted with a red box. Below the tabs, there are several sections: 'Dimensions', 'Statistics', 'Comments', 'Shipments', and 'Receipts'. The 'Shipments' section is highlighted with a red box.

4. Select the Shipment from the list.

Posted Transfer Shipments

Manage Print... Find entries... Shipment More options

No.	Transfer-from Code
C00000037-TS1	OTW

5. Scroll to the Lines section, select Line > Undo Shipment.

Posted Transfer Shipment C00000037-TS1

Home Shipment Automate Fewer options

Print... Find entries...

General

No.	C00000037-TS1	Transfer Order No.	C00000037-T0
Transfer-from Code	OTW	Transfer Order Date	7/8/2025
Transfer-to Code	YELLOW	Posting Date	7/8/2025
Direct Transfer	<input type="checkbox"/>	Department Code	
In-Transit Code	OWN LOG.	Customergroup Code	

Lines Manage Line

Dimensions Item Tracking Lines Undo Shipment

Item No.	Description	Quantity	Unit of Measure Code	Shipping Time	Custom Transit Number
→ 1900-S	PARIS Guest Chair, black	2	PCS		

6. With the Transfer Shipment undone, in the Posted Transfer Shipment page, click the Delete (bin icon) at the top of the card.

Posted Transfer Shipment C00000037-TS1

Home Shipment Automate Fewer options

Print... Find entries...

Delete the information

7. Navigate back to the Transfer Order card. Reopen the Transfer Order (Home > Reopen), then, click the bin icon at the top of the card to delete the Order.

Transfer Order C00000037-T0

Home Prepare Print/Send Order Actions Related Reports Automate Fewer options

Post... Create Whse. Shipment Reopen Create Whse. Receipt Create Inventory Put-away/Pick...

General

8. You will be taken back to the Container Card. Note that the Posted Transfer Receipts is now empty. Click the Undo Purchase Receipts button located at the top of the card.

Container Card

C00000037

Standard Receipt ☒ FOB Receipt ☐ ☒ Transfer Receipt ☐ Create Purchase Invoice ☒ Undo Purchase Receipts ☐ Print ☐ More options

Purchase Orders

Purchase Lines

Purchase Order No. ↑	Line No. ↑	Type	No.	Description	Vendor No.	Vendor Name	Location Code	Quantity	Qty. to Receive	Over-Receipt Quantity	Over-Receipt Code	Quantity Received
→ 106049	10000	Item	1900-S	PARIS Guest Chair, black	10000	Fabrikam, Inc.	OTW	2	0	0		2

Posted Purchase Receipts

Posted Purchase Receipt Lines

Purchase Receipt No. ↑	Line No. ↑	Type	No.	Description	Order No.	Vendor No.	Vendor Name	Location Code	Quantity	Quantity Invoiced	Expected Transfer Qty	Unit of Measure Code	Unit Cost
→ C00000037-PR	10000	Item	1900-S	PARIS Guest Chair, black	106049	10000	Fabrikam, Inc.	OTW	2	0	2	PCS	225

Posted Transfer Receipts

Posted Transfer Receipt Lines

Transfer Receipt No. ↑	Line No. ↑	Item No.	Description	Transfer-from Code	Transfer-to Code	Quantity	Unit of Measure Code
(There is nothing to show in this view)							

9. Refresh the page. You will note that the FOB Receipt button is now enabled, the Status field found in the Overview section of the Card is set back to New, and that a new Posted Purchase Receipt line was added to offset the original FOB Receipt.

Container Card

C00000037

Standard Receipt ☐ ☒ FOB Receipt ☐ ☒ Transfer Receipt ☐ Create Purchase Invoice ☒ Undo Purchase Receipts ☐ Print ☐ More options

Status: NEW

Handled By 3PL: ☐

Total Purchase Value: 451.60

Receipt Validation Status: -

Finance

Dates

Tracking

Partner

Capacity

Purchase Orders

Posted Purchase Receipts

Posted Purchase Receipt Lines

Purchase Receipt No. ↑	Line No. ↑	Type	No.	Description	Order No.	Vendor No.	Vendor Name	Location Code	Quantity	Quantity Invoiced	Unit of Measure Code	Unit Cost	Item Chg Base Amc
→ C00000037-PR	10000	Item	1900-S	PARIS Guest Chair, black	106049	10000	Fabrikam, Inc.	OTW	2	2	PCS	225.80	451
C00000037-PR	20000	Item	1900-S	PARIS Guest Chair, black	106049	10000	Fabrikam, Inc.	OTW	-2	-2	PCS	225.80	451

10. Apply the necessary changes to the Container, proceed as needed.

Update Expected Receipt Date of PO/Transfer Order Line with Reservation Qty

Users can update the scheduled receipt date of a container that has purchase order/transfer order lines with reservations. When the scheduled receipt date of the container is changed to a date earlier than the shipment date of the Sales Order line, the reservation will be preserved, and the scheduled receipt date of the PO/TO line will be updated. However, if the scheduled receipt date of the container is updated to a date later than the Sales Order shipment date, the PO/TO line expected receipt date will be updated but the reservation will be deleted.

To update the scheduled receipt date of a container and maintain the PO line reservation:

1. Locate the Sales Order that made the reservation and find the line shipment date.

Sales Order

S-ORD101345 · Adatum Corporation

Process Posting Release Prepare Print/Send Request Approval Order Report Synchronize EasyPost Actions Related Automate Fewer options

General > 7/28/2023 7/28/2023 7/31/2023 7595 Open

Type	Item Charge Qty. to Handle	Qty. Assigned	Planned Delivery Date	Planned Shipment Date	Shipment Date	Project Code	Cost Centre Code	Workflow test Code	Country Code	Province Code
→ Item	0	-	8/5/2023	8/5/2023	8/5/2023					
Item	0	-	8/4/2023	8/4/2023	8/4/2023					

2. Go to the Container Card, in the Dates section, locate the Scheduled Receipt Date field.

Click the Calendar icon found in the field to select a new date.

Container Card

C00000099

Standard Receipt FOB Receipt Transfer Receipt Print Automate Fewer options

Overview >

Dates

Scheduled Receipt Date 8/1/2023

Actual Receipt Date

Date Left Port

Tracking

Dest. Location Code Go to today Done

Expected Date of Arrival at Port

MILESTONE 1

MILESTONE 2

Shipment Method Code

To confirm that the reservation was preserved, open the purchase order that contains the line with reservation. Go to the Lines Fast Tab, confirm that the Expected Receipt Date was updated and that the line has a Reserved Quantity.

Purchase Order ✎ 🔗 + 🗑

106436 · Fabrikam, Inc.

Process Posting Release Prepare Print/Send Request Approval Order | Actions ▾ Related ▾ Automate ▾ Fewer options

General > Fabrikam, Inc. Open

Lines	Manage	Line	Functions	Order	Fewer options										
Type		Qty. Assigned	Promised Receipt Date	Planned Receipt Date	Expected Receipt Date	Reserved Quantity	Project Code	Cost Centre Code	Workflow test Code	Country Code	Province Code	Over-Receipt Quantity			
→ Item	⋮	—		8/3/2023	8/3/2023	25						0			
Item		—		8/3/2023	8/3/2023	—						0			

To update the scheduled receipt date of a container and maintain the TO line reservation, users must also confirm the Sales Order Shipment Date and modify the Scheduled Receipt Date on the Container Card to a later date. To confirm the date update, in the Container card, locate and open the Transfer Order line.

Unposted Transfer Orders

Unposted Transfer Order Lines

Transfer Order No. ↑	Line No. ↑	Item No.	Description	Transfer-from Code	Transfer-to Code	Quantity	
→ 1053	:	10000	2000-S	SYDNEY Swivel Chair, green	WEST	MAIN	45
1053		20000	1988-S	SEOUL Guest Chair, red	WEST	MAIN	25

In the Transfer Order, go to the Lines Fast Tab, confirm the Receipt Date and Reserved Quantity Shipped fields.

Lines	Manage	Functions	Line	Fewer options											
Item No.		Description	Quantity	Reserved Quantity Inbnd.	Reserved Quantity Shipped	Reserved Quantity Outbnd.	Unit of Measure Code	Receipt Date	Qty. to Ship	Quantity Shipped					
→ 2000-S	⋮	SYDNEY Swivel Chair, green	45	—	25	—	PCS	8/4/2023							
1988-S		SEOUL Guest Chair, red	25	—	—	—	PCS	8/4/2023							

4. REPORTING

The Inbound Container Handling app allows users to generate various types of reports. For example, users may print a report sheet containing all the details found in the Container Card or download Excel files to conduct a more in-depth analysis of the transactions posted in each of the various sections that comprise the Container Card. Documents may be attached to the Container Card to keep all information centralized and for a more convenient reporting.

Printing Container Card Reports

To generate a Container Card report, searching for Container List.

container list

Go to Pages and Tasks

> Container List

Administration

Next, select your preferred container.

Container List

Search + New Manage ☐ Purchase Order Qty Edit Log More options

Container ID ↓	Description	Status	Cost	Receipt Cost	Scheduled Receipt Date	Date Left Port	Tracking Number	Vessel	Agent	Dest Location Code
UM-0002	IN-TRANSIT ...	RECEIVED	2,231.70	2,231.70	11/30/2022					MAIN
UM-0001	UG	RECEIVED	14,495.95	14,495.95	11/30/2022					MAIN

At the top of the Container Card, select the Print button.

Container Card

UM-0002

Standard Receipt FOB Receipt Transfer Receipt **Print** Automate Fewer options

Overview

Container ID	UM-0002	Total Purchase Cost	2,231.70
Previous Container No.		Total Receipt Cost	2,231.70
Description	IN-TRANSIT RECEIVING	FOB Received	<input type="checkbox"/>
Status	RECEIVED	Received at Destination	<input type="checkbox"/>

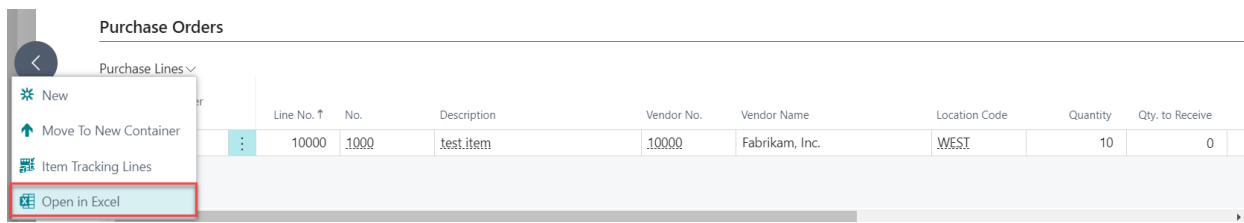
In the window that appears, select Preview and Close to generate a PDF report file.

Downloading Section Excel Files

Excel file downloads are available for the following sections:

- Purchase Orders
- Posted Purchase Receipts
- Posted Transfer Receipts
- Posted Warehouse Receipts
- Registered Put-away
- Purchase Charge Invoices

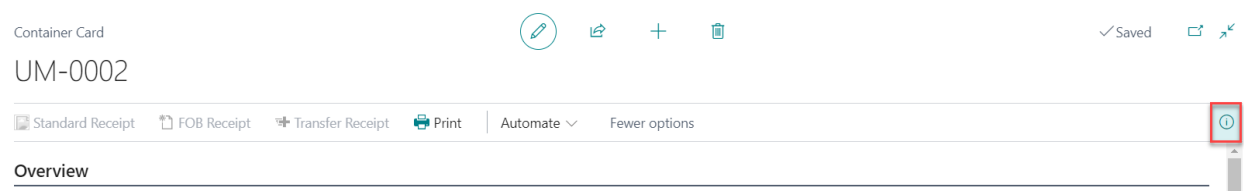
To download an Excel file report, locate the section of your interest in the Container Card, click the section's sub-heading, and select the Open in Excel option from the menu that appears.



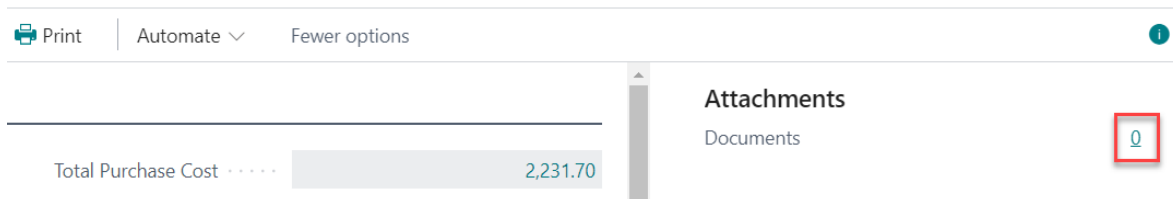
Attaching Files to a Container Card

To attach files to a Container Card:

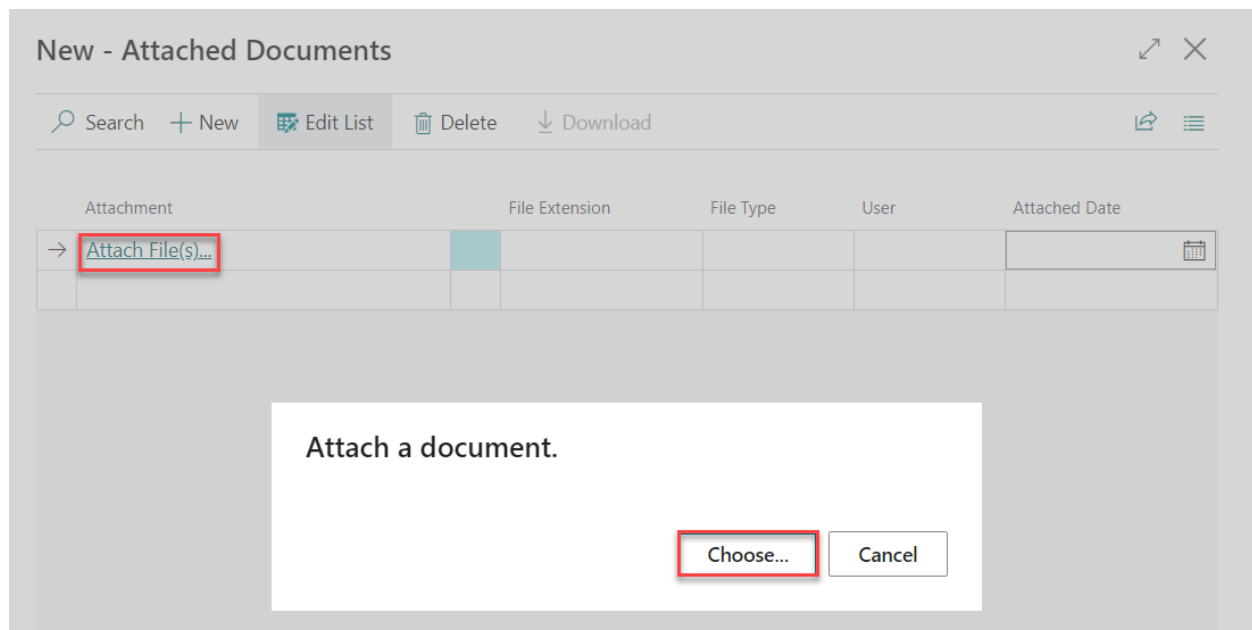
1. Select the "i" button that appears at the top of the window to expand the FactBox pane.



2. In the FactBox pane, click on the number that appears next to Documents.



3. In the New – Attached Documents window that appears, select Attach File(s)..., then select Choose and navigate to the location of the file you wish to attach.



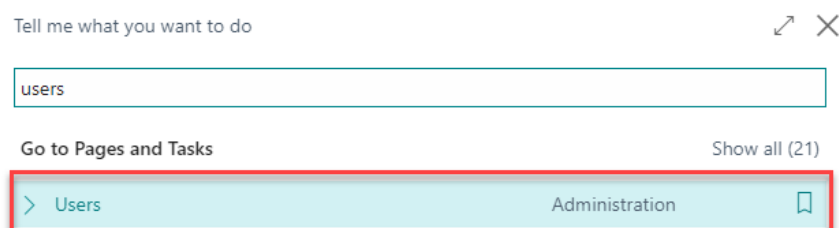
4. The selected file will be attached. Click Ok to save and close the window.

5. SECURITY

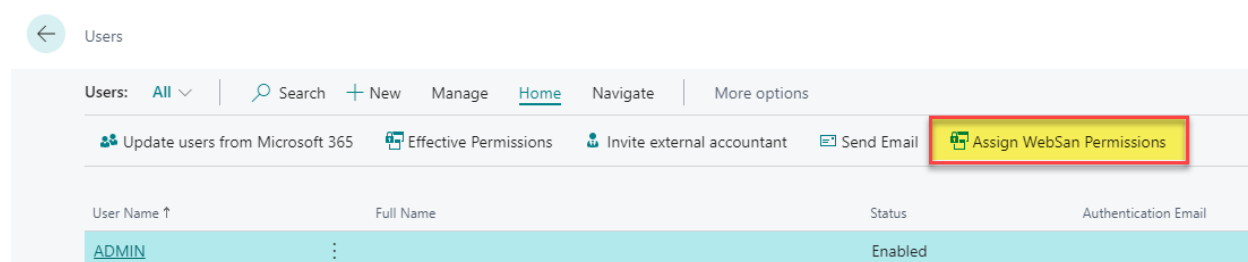
Once a WebSan application is installed, it is essential to assign user permissions to grant access to pages, data, actions, and additional components integrated with and generated by the WebSan Solutions Inc. applications.

The "Assign WebSan Permissions" feature, accessible under the Home Menu within the Users page of Dynamics 365 Business Central, assigns the necessary permissions for all users to access the complete range of pages, data, actions, etc., provided by all WebSan Solutions Inc. applications installed on the tenant.

To assign user permissions to the WebSan Solutions Inc. apps, search and go to the User list.



In the Users window, select Assign WebSan Permissions to assign all users the WebSan Permission Set.



Note that only a user with the proper permissions (Super is recommended) will be able to Assign WebSan Permissions.

6. REGISTRATION

To use any application developed by WebSan Solutions Inc., users must first provide their contact information as part of a registration process. This applies to all applications published by WebSan Solutions Inc.

Note: There is no cost to register an application. Users are only charged if they choose to purchase a license for a Production environment. Production licenses are not required in sandbox environments, allowing users to test WebSan Solutions Inc. applications for an unlimited time without cost.

Submitting WebSan client Information

To submit client information to WebSan Solutions Inc., in Dynamics 365 Business Central, navigate to the WebSan Client Information page. Fill all required fields under the Contact Information and Billing Information FastTabs. Before selecting "Transmit Data," ensure that the "Allow HTTPClient Requests" setting is enabled. This is necessary for the data to be successfully transmitted to WebSan.

WebSan Client Information

Home | Credit Card | More options

Transmit Data

General

MS Client ID {00000000-0000-0000-0000-00...} Partner Code

Active ☐ Allow HTTPClient Req... ☒

On Hold ☐

Contact Information

Company Test Company PostalCode / ZipCode .. 123

Website websan.com Country US

Name Sample Name Phone 1234567890

Address Sample Address Email websan@websan.com

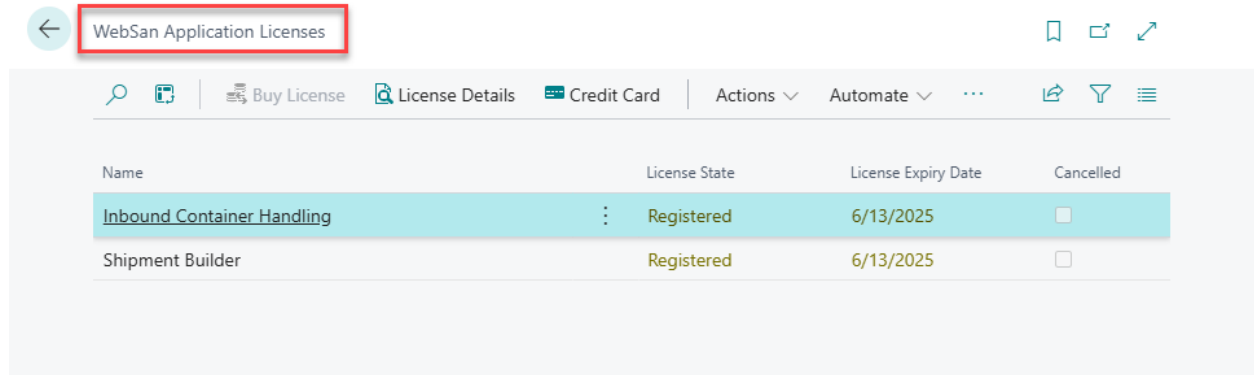
Address2 Email CC

City Sample City Billing is Same as Co... ☒

Province / State Sample Province

Verifying License Status

Users can view, purchase, and refresh licenses for applications on the WebSan Application Licenses page in Dynamics 365 Business Central. This window shows installed WebSan Solutions Inc. applications and their license status.



Name	License State	License Expiry Date	Cancelled
Inbound Container Handling	Registered	6/13/2025	<input type="checkbox"/>
Shipment Builder	Registered	6/13/2025	<input type="checkbox"/>

It is important to note that WebSan Solutions Inc. applications installed on Dynamics 365 Business Central sandbox environments do not require a production license. Instead, they only need a sandbox license that automatically renews prior to expiration; however, users must register the applications by submitting Client Information to WebSan before utilizing any WebSan app.

For more information about licensing and pricing, please visit

<https://www.websan.com/inbound-container-handling>

7. DEVELOPER NOTES

Container app needs to be added as dependency at app.json file of 3rd Party's app, with the version of latest.

Available Calls

We have a CodeUnit called "WSI0037 ExternalCall", which contains 3 procedures for clients to call to perform Standard Receipt, FOB Receipt and Transfer Receipt. The 3 calls performs the same as user manually click on container screen.

- Standard Receipt: ContainerStandardReceipt(ContainerID: Code[20]; Receive: Boolean; Invoice: Boolean)
- ContainerID: The PK "WSI0037 ID" under "WSI0037 Container" table. Receive: Set to True or False to determine if you want to perform Receive of Purchase Orders under the Container. Invoice: Set to True or False to determine if you want to perform Invoice of Purchase Orders under the Container. Receive and Invoice cannot both be false.
- FOB Receipt: ContainerFOBReceipt(ContainerID: Code[20]; isFinal: Boolean; Receive: Boolean; Invoice: Boolean)
- ContainerID: The PK "WSI0037 ID" under "WSI0037 Container" table. IsFinal: Used when Multi-Transfer is enabled on Container Setup page. If Multi-Transfer is not enabled, it will always be set to true doesn't matter what value passed in. If Multi Transfer enabled: True – Use Destination location set on Container card; False – Use Next location set on Container card. Receive: Set to True or False to determine if you want to perform Receive of Purchase Orders under the Container. Invoice: Set to True or False to determine if you want to perform Invoice of Purchase Orders under the Container. Can only be called if the container is not yet received at In-transit, otherwise will error out. Receive and Invoice cannot both be false.
- Transfer Receipt: ContainerTransferReceipt(ContainerID: Code[20]; isFinal: Boolean)
- ContainerID: The PK "WSI0037 ID" under "WSI0037 Container" table. IsFinal: Used when Multi-Transfer is enabled on Container Setup page. If Multi-Transfer is not enabled, it will always be set to true doesn't matter what value passed in. If Multi Transfer enabled:

True – Use Destination location on Container card; False – Use Next location on Container card. Can only be called if the container is received at In-transit/Next location, but not received at Destination, otherwise will error out.