



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.

For more information, please go to <https://www.websan.com/inbound-container-handling>.

2. BASIC SETUP

This section covers the basic system setup needed to create and manage containers. These steps should be completed prior to using the Inbound Container Handling app.

Container Setup

To set up the app, search for container setup.

Go to Pages and Tasks

>
Container Setup
Administration
🔖

In the Sales and Container Setup window, complete the setup of the application as needed.

Labels

UDF Text 1 Label <input type="text" value="IDENTIFIER -1"/> UDF Text 2 Label <input type="text" value="INTERMEDIATE PORT"/> UDF Text 3 Label <input type="text"/> UDF Text 4 Label <input type="text"/> UDF Text 5 Label <input type="text"/>	UDF Date 1 Label <input type="text" value="MILESTONE 1"/> UDF Date 2 Label <input type="text" value="MILESTONE 2"/> UDF Date 3 Label <input type="text"/> UDF Date 4 Label <input type="text"/> UDF Date 5 Label <input type="text"/>
---	---

Receiving

Disable Edit Qty Receive <input type="radio"/>	Allow Editing Quantities After FOB Re... <input checked="" type="checkbox"/>
Disable Backorder Unreceived Quan... <input type="radio"/>	Disable In-Transit (FOB) Receiving <input type="radio"/>
Allow Over Receiving <input checked="" type="checkbox"/>	Default In-Transit Location <input type="text" value="WEST"/>
Disable Job Consumption upon Rec... <input type="radio"/>	

Transfers

Allow Multiple Transfer Receipts <input type="radio"/>	Create Transfer Receipt upon FOB Re... <input type="radio"/>
Disable Transfer Posting <input type="radio"/>	Post Transfer Shipment <input type="radio"/>

Warehousing

WMS Transition Code <input type="text" value="OUT. LOG."/>	Disable Register Warehouse Put-away ... <input type="radio"/>
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Container Maintenance

Disallow Adding Non-Inventoried It... <input type="radio"/>	Override Document No. <input type="radio"/>
Can Assign Released Purchase Order ... <input checked="" type="checkbox"/>	Use Default Counter as ID <input checked="" type="checkbox"/>
Can Edit Gross Weight <input checked="" type="checkbox"/>	Container Nos. <input type="text" value="WSICONTAINER"/>
Can Edit Total CBM <input checked="" type="checkbox"/>	

The configuration settings found in this section include:

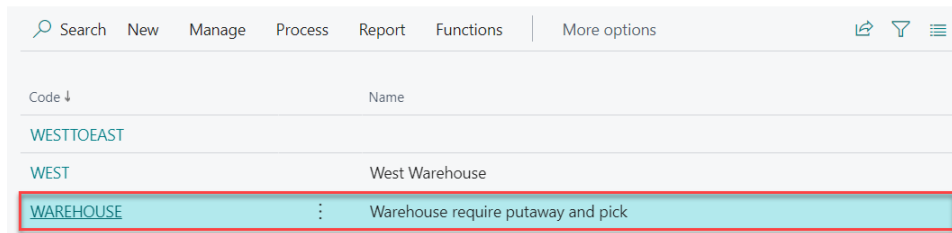
- UDF Text # Label – Display name for user definable field. Populating this value will enable the field.
- UDF Date # Label – Display name for user definable field. Populating this value will enable the field.
- Disable Edit Qty Receive – By activating, users will not be able to edit the quantity to receive value on the PO line. This will force users to always receive the entire PO line.
- Disable Backorder Unreceived Quantities – 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.
- Allow Over Receiving – 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 – By disabling Job Consumption upon Receiving, Negative Adjustment will not be created for any FOB receive with Job in Purch Line.
- Allow Edit Quantities After FOB Receipt – 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 – This will disallow users to process an in-transit receipt. If activated, users will need to fully receive goods to their final destination.
- Default In-Transit Location – 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.

- Allow Multiple Transfer Receipts – 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 – 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 – 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 – Post Transfer Shipment but not Warehouse Receipt if Create Transfer Receipt upon FOB Receipt is off and is warehouse location.
- WMS Transition Code – The In-Transit Code on Transfer Order when destination is a warehouse location.
- Disable Register Warehouse Put-away – Put-away will not be auto registered on auto posting of warehouse receipt from Container.
- Disallow Adding Non-Inventoried Items – By activating, non-inventoried items on Purchase Order line will not be able to be added to Container.
- Can Assign Released Purchase Order – Determines if PO lines that can be assigned to a container are limited to those in Open status versus Open or Released status.
- Can Edit Gross Weight – Allows users to override the gross weight value which is otherwise automatically calculated based on items assigned to the container.
- Can Edit Total CBM – Allows users to override the item volume value which is otherwise automatically calculated based on items assigned to the container.
- Override Document No. – Overrides the document numbers on the transactions made by the app to be Container No with a "-X". (Purchase Receipt, Transfer Order, Warehouse Receipt)

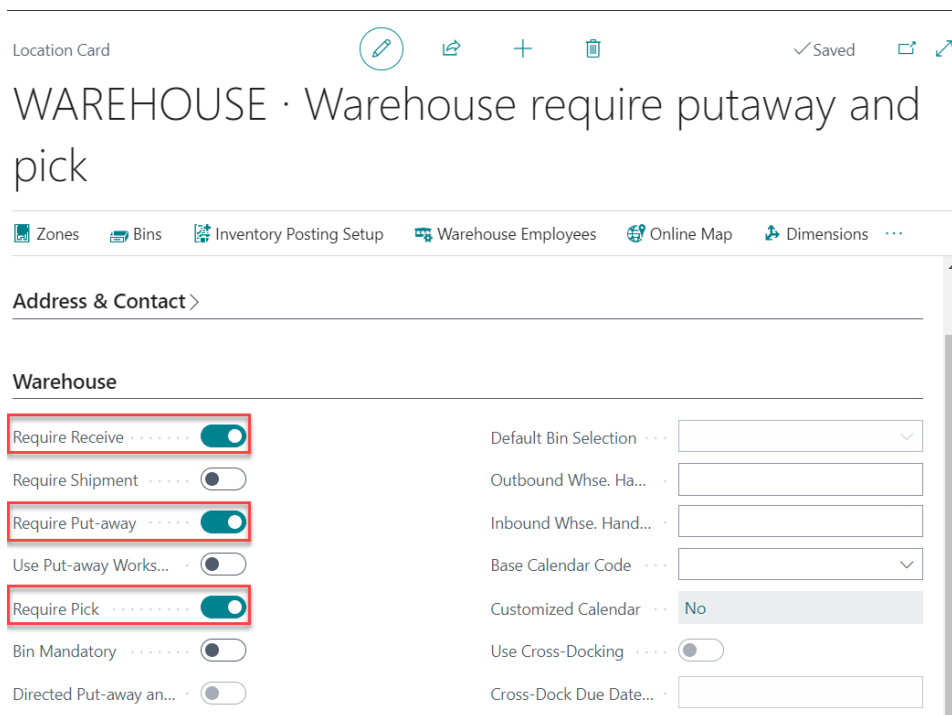
- Use Default Conter as ID – This will automatically assigns a counter as the ID to any new containers that are created.
- Container Nos. – Specifies the number series code used to assign numbers to Container.

Locations Setup

To set up warehouse, search for Locations. From the Locations List, select the location your 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.



This completes the application basic setup.

3. FUNCTIONALITY

Creating a New Container

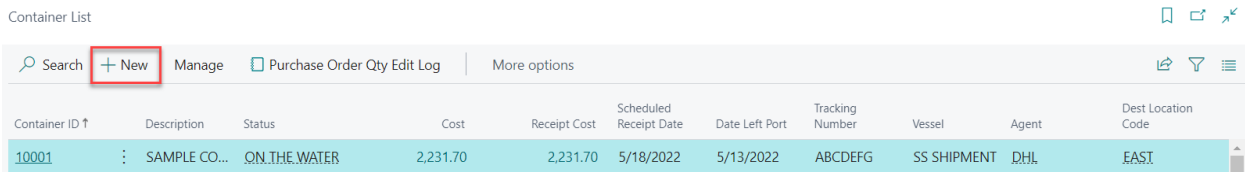
The Inbound Container Handling app allows users to mass update and receive purchase orders assigned to containers, process FOB receipts, auto-allocate landed costs to goods in containers, etc.

To create a New container, start by searching for container list.

Go to Pages and Tasks



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



Entering a Container’s Basic Information

In the Container Card, users can find all the fields required to properly set up a container. Here, users must enter important details, such as container ID, scheduled receipt date, capacity, and more.

To enter containers basic details, users must:

1. Complete the Overview section. Start by entering a Container ID and providing a useful description. The status of a newly created Container Card is defaulted to New; however, as transactions are entered, its status will update automatically. Users may also change the Container Card status manually by selecting an option from the Status drop-down list. Total Purchase Cost and Total Receipt Cost are reporting fields that also update automatically as transactions are entered against a container. The FOB Received,





Received at Destination, and Handled by 3PL toggles are activated automatically as transactions are posted against the container.

Overview

Container ID	C00000097	Total Receipt Cost	0.00
Previous Container No.		FOB Received	<input checked="" type="checkbox"/>
Description	TRANS-ATLANTIC WEST	Received at Destination	<input checked="" type="checkbox"/>
Status	NEW	Handled By 3PL	<input checked="" type="checkbox"/>
Total Purchase Cost	0.00		

- In the Dates section, select the calendar button that appears next to the Scheduled Receipt Date and pick the date the container is scheduled to be received. Note that this will automatically update the Scheduled Receipt Date on the PO lines linked to the Container. Additional fields like Date Left Port, Expected Date of Arrival at Port, and up to 5 User Defined Fields are also available. Refer to the Basic Setup section of this user guide to learn how to modify the number of UDF Date fields.

Dates

Scheduled Receipt Date	11/28/2022 	Expected Date of Arrival at Port	
Actual Receipt Date		UDF DATE 1	
Date Left Port	11/26/2022 		

- In the Tracking section, expand the Dest. Location Code drop-down list to select the intended final destination of goods. The In-Transit Location field will default to the 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 field, 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. 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, etc.

Tracking

Dest. Location Code	MAIN	Insurance Confirmation	
In-Transit Location	WEST	Shipment Method Code	
Next Transfer Location	EAST	Custom/Duty	
Port Of Origin		Bill of Lading	
Port Of Entry		Manifest Number	
Tracking Number		Bill Number	
Seal Number		UDF1	

- 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.

Partner

Vessel	<input type="text" value="123456789"/>	Vendor ID	<input type="text" value="20000"/>
Agent	<input type="text" value="POSTALMAIL"/>	Vendor Name	<input type="text" value="First Up Consultants"/>
Carrier	<input type="text"/>	Forwarder	<input type="text"/>

- 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.

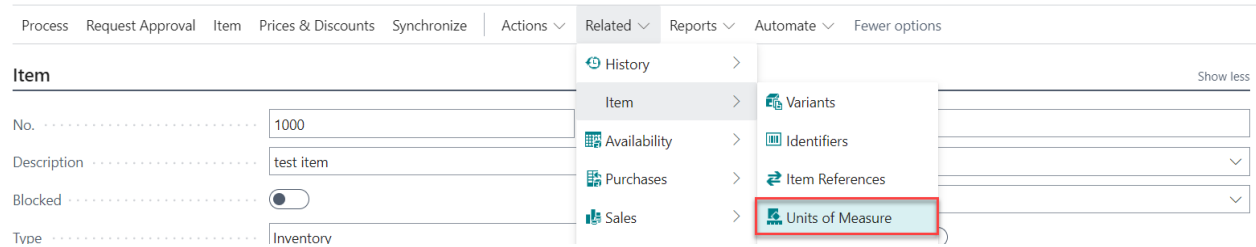
Capacity

Container Type	<input type="text" value="40FT"/>	Weight UOM	<input type="text" value="KG"/>
Size UOM	<input type="text" value="Meter"/>	Total Cartons	<input type="text" value="0.00"/>
Length	<input type="text" value="12.18"/>	Tare Weight	<input type="text" value="3,750.00"/>
Width	<input type="text" value="2.44"/>	Gross Weight	<input type="text" value="3,750.00"/>
Height	<input type="text" value="2.59"/>	Max Weight	<input type="text" value="30,400.00"/>
Total CBM	<input type="text" value="0.00"/>	Weight Percentage Full	<input type="text" value="12.34%"/>
CBM Percentage Full	<input type="text" value="0.00%"/>		

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.

Height	<input type="text" value="2.90"/>	Max Weight	<input type="text" value="30,480.00"/>
Total CBM	<input type="text" value="80.10"/>	Weight Percentage Full	<input type="text" value="15.12%"/>
CBM Percentage Full	<input type="text" value="92.94%"/>		

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.

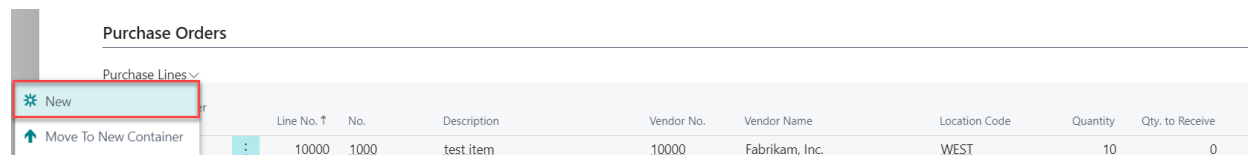


Adding Purchase Order Lines

From the Container Card, users will also add Purchase Order Lines and manage their standard, FOB, and transfer receipts.

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

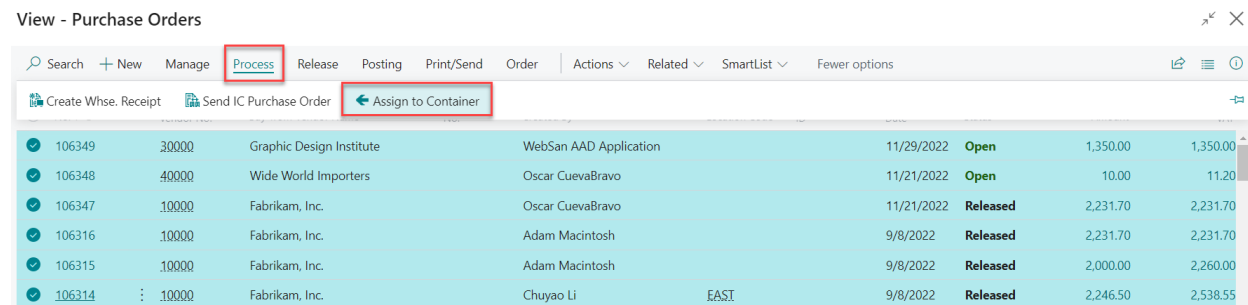
1. Scroll down to the Purchase Order section, then click the Purchase Lines subheading and select New.



2. The View – Purchase Orders window that appears will show 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 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 all the PO lines found in the selected POs will be added to the container.



- b. Assign lines from a single Purchase Order – at the header level. This is an alternative to the simultaneous assignment (explained in the previous point) that assigns all the lines on the PO to a container. Note that all assignments are technically performed at the line level.

View - Purchase Orders

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, select PO number from the list. The Purchase Order Card will open. In the General section, expand the Container ID drop-down list and locate your container. With your container selected, go back to the Container Card. Here, you will notice that the PO lines have been added.

106343 · Fabrikam, Inc.

General

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 N...

Created By: Oscar CuevaBravo

Lines

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

Container ID dropdown list:

Container ID ↑	Description	Status
NEW - A1Z2	A1Z2	NEW
NEW - ASCXC	ADSFDS	NEW
NEW - S002	SUMMIT 002	NEW
NEW - S003	SUMMIT 003	NEW
NEW - UM-001		NEW
→ UM-0001	UG	NEW

Users also have the option to assign PO lines from the same Purchase Order to different containers if needed. In the Lines grid, scroll to the right to find the Container ID column. There, click the down-facing arrow to expand the Container ID list and select a container.

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

Vendor Shipment No. Contract No.

Created By Oscar CuevaBravo

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 Liable	Contract No.
Item						No	0		NEW - UM-001	MAIN	<input type="checkbox"/>	
Item						No	0		NEW - UM-001	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

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 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.

Purchase Order 106344 · Wide World Importers

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

General Show more

Vendor Name: Wide World Importers Status: Open

Contact: Toby Rhode Project No.:

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

Vendor Invoice No.: 7391 Container ID:

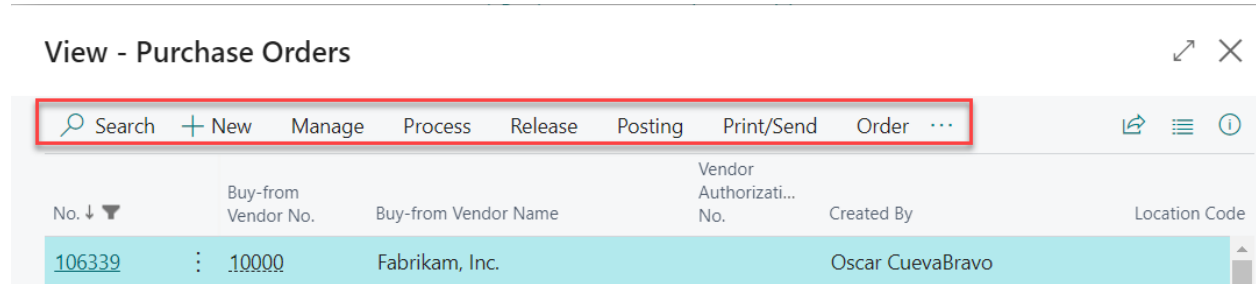
Vendor Shipment No. Contract No.:

Created By: Oscar CuevaBravo

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

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

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.



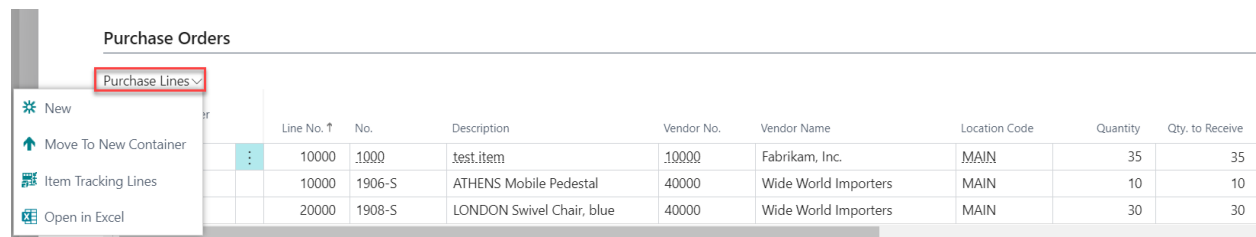
After all the needed PO lines have been added to the container, users can go to the Purchase Orders section of the Container Card to see a list of such lines.

Purchase Orders

Purchase Lines ▾

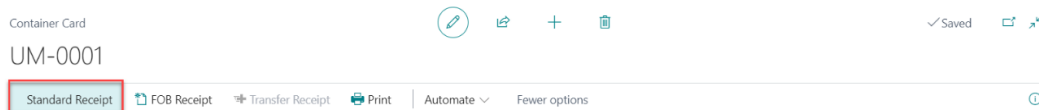
Purchase Order No. ↑	Line No. ↑	No.	Description	Vendor No.	Vendor Name	Location Code	Quantity	Qty. to Receive	
→ 106343	:	10000	1000	test.item	10000	Fabrikam, Inc.	MAIN	35	35
106344		10000	1906-S	ATHENS Mobile Pedestal	40000	Wide World Importers	MAIN	10	10
106344		20000	1908-S	LONDON Swivel Chair, blue	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, and open a report of the container’s PO lines in Excel.

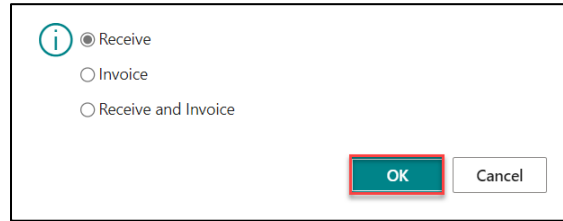


Performing Standard Receipts

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.



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

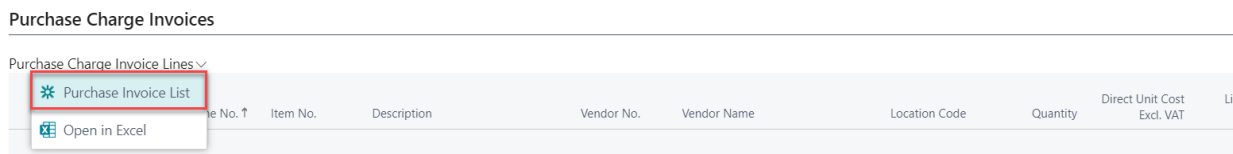


Confirming the receipt will populate the Posted Purchase Receipts section. In the event that the Container is shipped to a warehouse location, and that the Required Put-away and Require Pick toggles (found in the Location Card) are activated, the Posted Warehouse Receipts and Registered Put-away sections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

Creating Purchase Charge Invoices

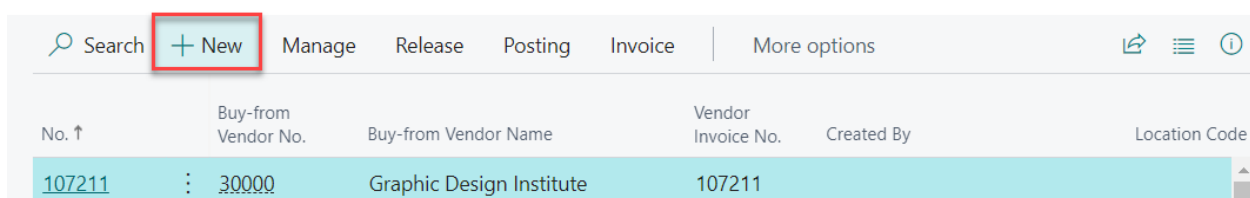
The Purchase Charge Invoices section allows users to reflect the freight/landed costs of inbound containers, generate invoices, and maintain a centralized view of all various costs associated with a container. To add Purchase Charge Invoice Lines, users must:

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.



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

View - Purchase Invoices



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.

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 ... 🔗

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

Purch. Receipt Lines ↗ ✕

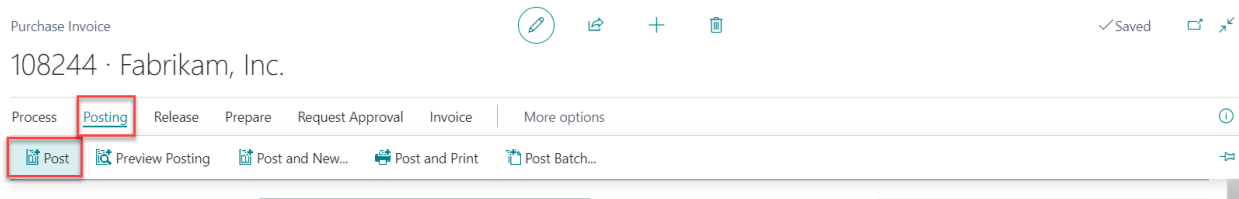
🔍 UM-0001 ✕

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	

7. Post your Purchase Invoice.

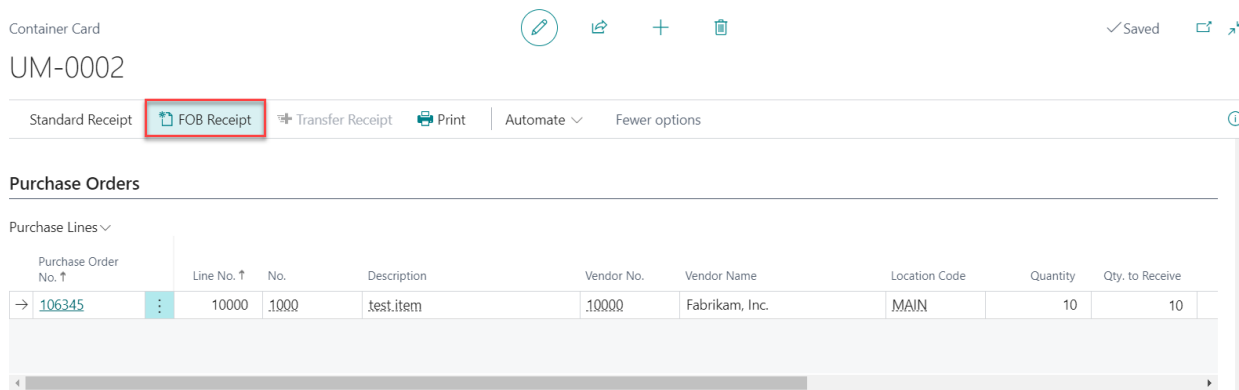


The Purchase Invoice will be reflected in the Purchase Charge Invoices and Posted Purchase Receipts sections of the Container Card.

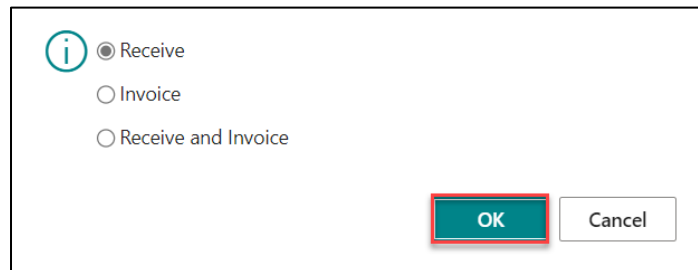
Performing FOB Receipts

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.



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



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.

Container Card ✓ Saved

UM-0002

Standard Receipt
FOB Receipt
Transfer Receipt
Print
Automate ▾
Fewer options

- 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	.1000	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.



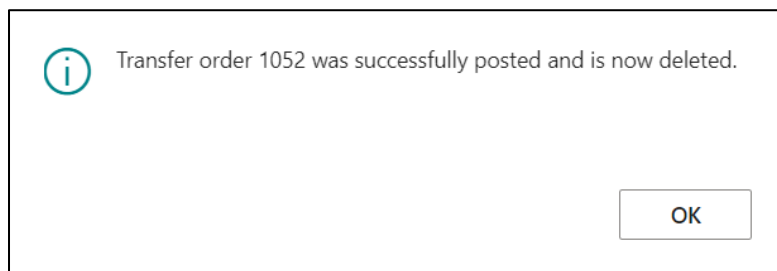
The order created can be found in the Unposted Transfer Orders section of the Container Card.

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 and 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

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

Expected Date of Arrival at Port

MILESTONE 1

MILESTONE 2

Tracking

Dest. Location Code

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 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



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 🔍 📄 + 🗑️ ✓ Saved 📄 🔄

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"/>

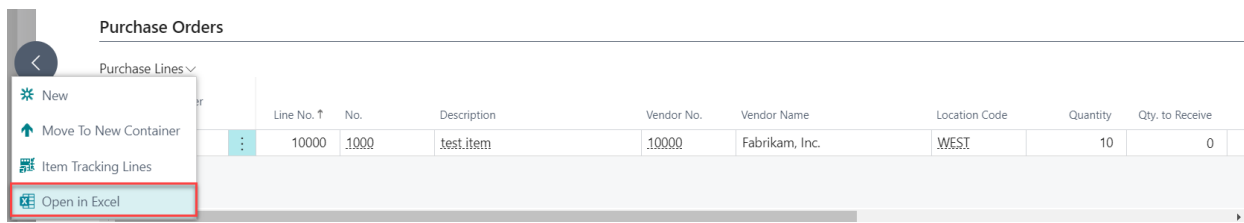
In the window that appears, select Preview and Close to generate a PDF report file.

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

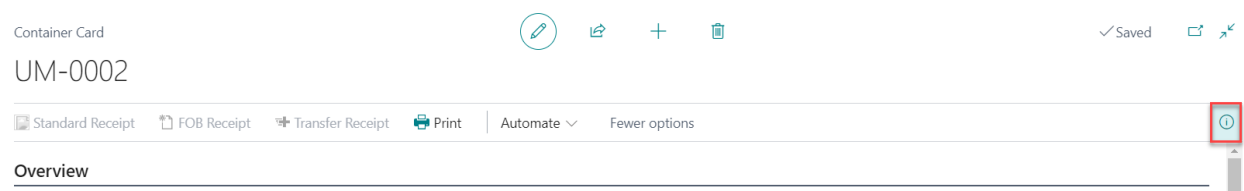
To download an Excel file report, locate the section of your interest in the Container Card, click the section’s sub-heading, and select the Open in Excel option from the menu that appears.



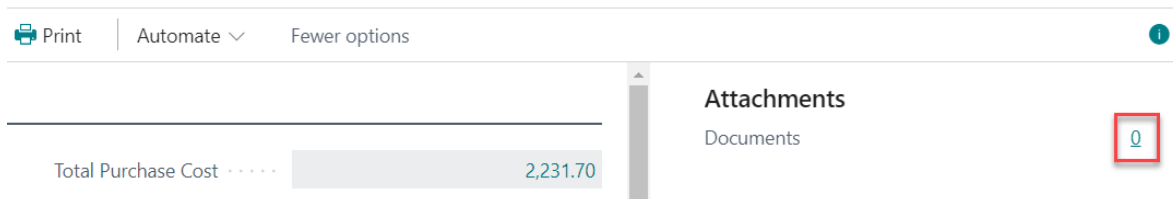
Attaching Files to a Container Card

To attach files to a Container Card:

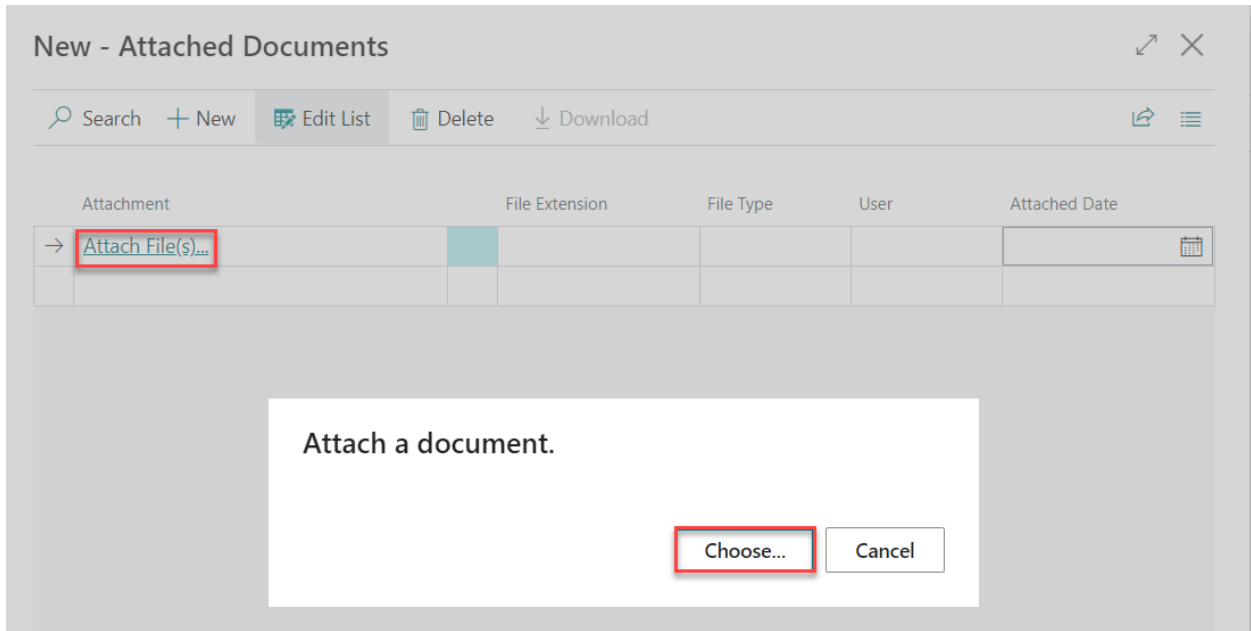
1. Select the “i” button that appears at the top of the window to expand the FactBox pane.



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.



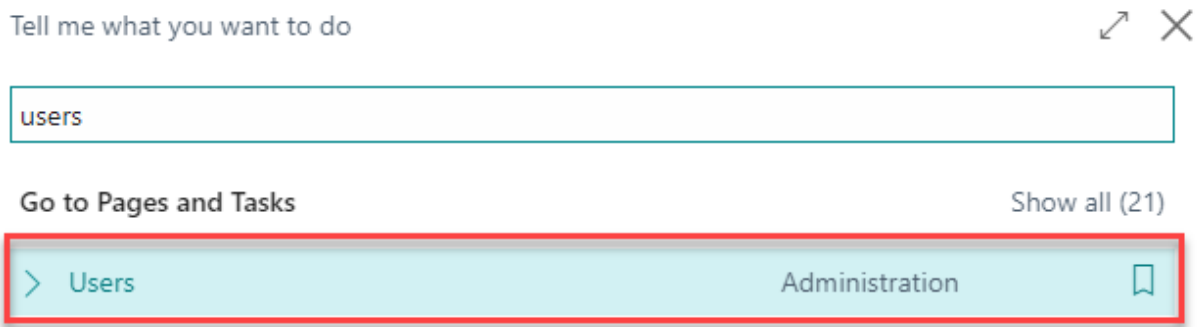
4. The selected file will be attached. Click Ok to save and close the window.

5. SECURITY

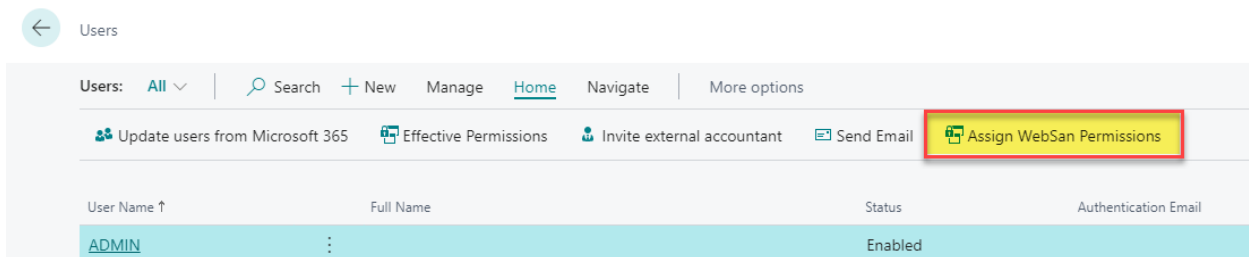
The Item Attributes for Dynamics 365 App, along with the rest of WebSan Inc.'s Dynamics 365 apps, have a built-in AutoPermission security functionality. When a user with the proper credentials installs an App, the AutoPermission function automatically triggers and assigns or updates the user's permissions. No other action is needed from the user.

When a user without the proper credentials installs an App, the AutoPermission function allows the installation, but user permissions are not changed. In this case, a user with the proper security credentials can change the user's permissions later.

To change user permissions, search and go to the User list.

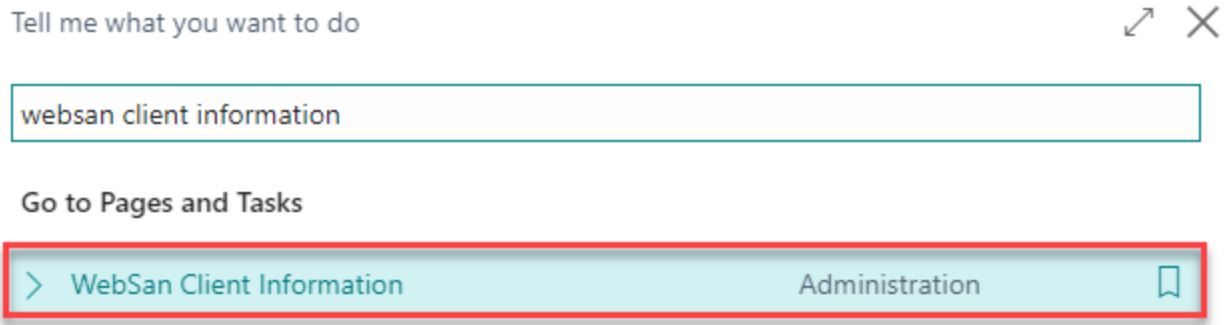


In the Users window, select Assign WebSan Permissions to assign all users the WebSan Permission Set.



6. REGISTRATION

To register a WebSan Inc.'s application, in Business Central, search WebSan Client Information and select WebSan Client Information – Administration.



In the WebSan Client Information window, enter your company's contact and billing information. After your information is complete, select Transmit Data.

