

TERNPOINT



USER GUIDE

TPS Container Management

TERNPOINT.SOLUTIONS



TPS Container Management

TPS Container Management allows for the tracking of purchased inventory on a shipping container record. Containers can have inventory included from several purchase order lines, or partial purchase order lines. Actual and expected shipment and receipt dates can also be tracked by shipping agent on the container record. Along with being able to receive the container, in-transit receiving can be enabled when ownership of the inventory needs to be taken at the time the container is loaded. With in-transit receiving, the inventory is received into an ‘on-water’ location and then can be received via an automated transfer order, into its final location when it arrives. This process also enables landed cost application through its journey. Other details like seals, vessel, voyage as well as bill of lading numbers can be tracked. Containers are fully integrated into Business Central’s warehousing module. Using In-transit Receiving is not a requirement in order to use containers. However, it is included as part of the Container Management app.

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LICENSING

A companion app to manage licensing is automatically installed with the first app that is installed from Ternpoint Solutions

1. A new **Permissions Set** was added as part of the app install. **TPS LM LICENSE MGT.** Assign this permission sets to users in advance of use, on the **User Setup** card.
2. Extension Setup
 - a. Search for and open **Extension Management**.
 - b. Select **Ternpoint License Management** and open.
 - c. Ensure *Allow HttpClient Requests* is activated

The screenshot shows the 'Ternpoint License Management' configuration screen. It has a 'Group' header. Below it, there are four fields: 'App ID' with value '320dac76-d021-4827-a159-f37...', 'Publisher' with value 'Ternpoint Solutions LP', 'Name' with value 'Ternpoint License Management', and 'Allow HttpClient Requests' which is a toggle switch currently turned on.

3. Ternpoint Product Registration
 - a. Search for and open **Ternpoint Product Registration**.
 - i. On this page all subscription type Ternpoint Solutions apps that have been installed are shown. Also from this page contacting Support, viewing your subscription status, creating a trial license, applying for an extension to your trial license or requesting a full one year license can be done.
 - ii. Enter appropriate Contact Info and select **Register** in the ribbon.
 1. *If registering the app in a separate company from one already purchased, ensure the same contact information is used across all Business Central companies to avoid a second monthly subscription fee. The license fee is per Business Central tenant,*
 - iii. In the line section of the page select **Create Trial License**.
 1. A 30 day trial license will be created for evaluation purposes.
 2. If more time is needed to evaluate the app please select the **Extend License** or **Contact Support**.
 3. In order to purchase a full license please select **Request Full License**.
 4. *Email setup must be enabled in order to send emails requesting licenses or to contact support using the link.*
 - iv. In order to uninstall the app, navigate to **Extension Management**, select the app and select **Uninstall** in the ribbon.

The screenshot shows the 'Product Registration' screen. It has a header with 'Retrive All Licenses', 'Contact Support', and 'More options'. Below is a 'General' section with two columns of fields. The left column contains 'Subscription ID' (1659b0df-4be4-4e54-b04e-947bc3871564), 'Environment' (Production), 'Registered' (toggle on), 'Registered On' (7/21/2023), and 'Verify License for Sandbox' (toggle on). The right column contains 'Contact Info' with fields for 'First Name' (Jason), 'Last Name' (Sanders), 'E-Mail' (jsanders@outlook.com), 'Phone No.' (555-555-2323), and 'Contact ID' (045618b3-2b29-4082-b534-1f9f1278e04). Below this is a 'Company' section with a ribbon containing 'Applications', 'New Line', 'Delete Line', 'Create Trial License', 'Extend License', and 'Request Full License'. At the bottom is a table with columns: App ID, App Name, Subscription Type, Subscription Status, Installed On, Expires On, and Product ID. The table has one row with the following data: App ID '16529b3c-3e79-471c-b0e5-f8d680682ed9', App Name 'Vendor Certificates', Subscription Type 'Production', Subscription Status 'Active', Installed On '7/21/2023 11:41 AM', Expires On '7/21/2024 6:50 PM', and Product ID '1ec1907a7-22e1-4280-8379-629f126a9b3f'.



PERMISSIONS

1. Two new **Permissions Sets** were added as part of the app install. **TPS CMG CONTMGT EDIT** and **TPS CMG CONTMGT READ**. Assign these two permissions sets as appropriate to users in advance of use, on the **User Setup** card.

CONTAINER SETUP

1. Search for and open **Container Setup**. Look up and select a no. series for **Container Nos.** and if using In Transit receiving then also select a **Transfer order Nos** number series.
 - a. If a new **No. Series** needs to be created, create a new one by selecting **New**, and entering a **Code**, **Description**, and clicking **Default Nos**.
 - b. After setting up the new code, drill into the **Starting** or **Ending No.** and populate the **Starting No.** with a unique alpha numeric code.
2. If using in transit receiving:
 - a. Select an **OnWater Location**. This location will be used to receive into and hold inventory while the product is in transit. If you do not have an 'On water' or similar location then create a location with no advanced warehousing nor bins (see below for in transit setup).
 - b. Select a **Reclass. Journal Template** of Transfer and a **Reclass Journal Batch** that will be used to move the inventory after its received to the **OnWater Location**.
 - i. Ensure the batch does not have a **No. Series** selected, this field needs to be blank.
 - c. Turn on the **Default In-Transit** toggle if all containers created should default to in transit = true.
 - d. The **Auto Post Transfer Order** option is provided to automatically post the **Warehouse Receipt** on post receive container (if require receipt is enabled on the **Location Card**). If this option is not selected then the Warehouse Receipt will be created but not post received.

Container Setup

General

Container Nos

EMP

Reclass. Journal Templ...

TRANSFER

Transfer Order Nos

T-ORD

Reclass Journal Batch ...

ONW

OnWater Location

ONW

Default In-Transit

Auto Post Transfer Or...

CONTAINER TYPES

1. Search for and open **Container Types**.
2. Insert a new record by selecting **New** in the ribbon.
3. Enter a **Code**, **Description**, **Capacity**, **Cube**, **Length**, and **Weight** (of the empty Container)
4. When **Purchase Order** lines are added to the **Container**, a % fill of weight and cube is calculated.

Container Types

✓ Saved

Search

+ New

Edit List

Delete

| code ↑ | Description | Capacity | Cube | Length | Weight |
|-----------|-------------------|-----------|--------|--------|----------|
| → 20FTDRY | 20ft Standard Dry | 13,000.00 | 150.00 | 20.00 | 5,050.00 |
| 40FTDRY | 40ft Standard Dry | 26,500.00 | 300.00 | 40.00 | 8,000.00 |
| | | | | | |



CONTAINER PORTS

1. Search for and open **Container Ports**.
2. In set a new record by selecting **New** in the ribbon.
3. Enter a **Code**, **Description**, and **Country**.

Container Ports

✓ Saved

🔖

📄

↗

🔍 Search

+ New

✎ Edit List

🗑 Delete

🔗

🔍

☰

| Code ↑ | Description | Country |
|-------------|-------------------------|---------|
| → BUSAN | Busan | KR |
| CHENNAI | Chennai | MY |
| GUANGZHOU | Guangzhou | CN |
| KOLKATA | Kolkata | MY |
| Long Beach | Long Beach (Port of LA) | US |
| NHAVA SHEVA | Nhava Sheva | IN |
| QINGDAO | Qingdao | CN |
| SHANGHAI | Shanghai | CN |
| TIANJIN | Tianjin | CN |
| YOKOHAMA | Yokohama | JP |

IN-TRANSIT SETUP

Using **In-transit Receiving** is not a requirement in order to use containers. However, it is included as part of the Container Management app. This section can be skipped if **In-transit Receiving** is not a going to be used.

1. Search for and open **Locations**.
2. Create a new location for your In-transit/on-water location(s).
 - a. Enter a **Code** and **Description**.

Note no other advanced warehouse functions should be set at this location. It is a pass-through location, for In-transit Receiving only. Complete the Inventory Posting Setup for any new location added.



ONWATERSCD · On Water

Process Location Related Automate Fewer options

General

Code ONWATERSCD Exclude from Tax Calc... ☒

Name On Water Tax Area Code

Use As In-Transit ☒ Tax Exemption No.

Address & Contact >

Warehouse

Require Receive ☒

Require Shipment ☒

Require Put-away ☒

Use Put-away Works... ☒

Require Pick ☒

Bin Mandatory ☒

Directed Put-away an... ☒

Default Bin Selection

Outbound Whse. Ha...

Inbound Whse. Hand...

Base Calendar Code

Customized Calendar No

Use Cross-Docking ☒

Cross-Dock Due Date...

3. Search for and open **Transfer Routes**.

a. This must be completed before containers are attempted to be in-transit shipped

4. Fill in the In-transit location for each combination of from and to location by select in the ellipsis (...) in the matrix.

Note that this is the standard Business Central In-Transit location that is used on a Transfer Order. Not to be confused with In-transit Receiving

Transfer Routes

◀ Previous Set ▶ Next Set More options

Options

Show In-Transit Code Show Transfer-to Name ☒

| Transfer Routes Matrix | | Manage | | | |
|------------------------|--------------------------------|------------|----------|----------|----------|
| Transfer-from Code ↑ | Transfer-from Name | ONWATERSCD | RN-M-100 | RN-W-100 | SC-D-100 |
| → ONWATERS... | On Water to Sacramento | — | INTRANS | INTRANS | ... |
| RN-M-100 | Reno Production Facility | INTRANS | — | ... | ... |
| RN-W-100 | Reno Production Warehouse | INTRANS | ... | — | ... |
| SC-D-100 | Sacramento Distribution Center | ... | ... | ... | — |
| SF-R-100 | San Francisco Downtown Store | ... | ... | ... | ... |
| SF-R-200 | San Francisco Marina Store | ... | ... | ... | ... |
| TR-R-100 | Truckee Retail Store | ... | ... | ... | ... |
| USCOLD SAC | US Cold Storage Sacramento | ... | ... | ... | ... |



5. If an **In-Transit** location is not setup set one up by creating a new **Location Card**.
 - a. Search for and open **Locations**.
 - b. Enter a **Code** and **Description**.
 - c. Turn on **Use As In-Transit**.

Note no other advanced warehouse functions can be set at this location. It is for use on Transfer Orders only. Complete the Inventory Posting Setup for any new location added.

INTRANS · Intransit

Process Location Related Automate Fewer options

General

Code INTRANS Exclude from Tax Calc... ☐

Name Intransit Tax Area Code

Use As In-Transit ☒ Tax Exemption No.

USING CONTAINERS

1. A function on the **Purchase Order** ribbon has been added to create a Container directly. The function is found using **Function ► Create Container**.
2. A Container can also be created by searching for an open **Containers** and select **New** from the ribbon.
3. Tab to the **Description** field and a number will be assigned from the **No. Series**.
4. Enter a **Description**, select a **Container Type**, and **Posting Date**.
 - a. A **Posting Date** is mandatory in order to release. (Posting Date will be the date the container is “shipped” if using in-transit receiving.)
5. If known select a **Port of Loading**, **Port of Discharge**, and enter a **Vessel**, **Voyage**, **Booking No.** and **BOL No.** These can also be filled in before receiving if not known at the time of **Container** setup.
6. If while the Container is in transit a destination location code change is needed, the **Final Destination Location** field can be populated. On post receive of the container the inventory will be redirected to this location. Note, **Auto-Post Transfer** should be enabled on **Container Setup** for this to function correctly.

CN003609

Home Release Posting Navigate Related Automate Fewer options

Get Purchase Lines Tracking Info Comments Seal Info

General

Container No. CN003609 Voyage No. VOY7652-88642-3

Description Containers and Coffee Booking No. BK79695

Container Type 20FTDRY Posting Date 8/4/2023

Port of Loading SGSIN FDA Status Pending

Port of Discharge USSPQ Container Status Open

Final Destination Loc... MAIN SCAC Code 1221

Vessel No. VES987964 Created At 8/4/2023 9:07 AM



7. Select a **Location Code** in the **Shipping** tab.

Note that only **Purchase Order Lines** that have this **Location Code** can be added to the **Container**.

If this Container will be **In-transit** received, then **In-Transit Receiving Required** must be selected before posting.

NOTE: Once the **Container** has been post shipped the **Location Code** cannot be changed.

8. A **Shipping Status** field has been provided to define appropriate shipment statuses.

Select - Container Shipping Status | 🔍 ⌵ + New Edit List ...

| Code ↑ | Description |
|---------------|------------------------|
| LOADED | Loaded |
| OVERSEAS PORT | Over Seas Port |
| IN TRANSIT | Shipped - In transit |
| AT US PORT | At US Port |
| → ARRIVED | Arrived at Destination |

9. Expected and actual dates can be filled in on the **Container** if there are only one set of dates. If there are several carriers with differing dates that will handle the **Container** then use the **Process ▶ Tracking Info** link in the ribbon to enter more than one date/carrier combination.

Tracking · CN003571 ✓ Saved

Tracking Info | 🔍 Search + New Edit List Delete

| Shipping Agent Code | Shipping Agent Service Code | Comment | Date | Received Date | Shipped Date |
|---------------------|-----------------------------|---------------|------------|---------------|--------------|
| → COSU | | Ocean Carrier | 11/17/2022 | 11/18/2022 | 11/25/2022 |
| CWIN | | Rail Carrier | 11/17/2022 | 11/28/2022 | 11/30/2022 |

10. **Seal** record(s) can be added by selected **Process ▶ Seals** in the ribbon. If a **Seal** is cut for inspection and replaced a new record can be inserted with a date it was put on the **Container**.

CN003571

Seal Info | 🔍 Search + New Edit List Delete

| Port ↑ | Seal No. | Date |
|-----------|---------------------|------------|
| LONGBEACH | 87FN3097DKN4098D53K | 11/17/2022 |



ADDING PURCHASE LINES TO A CONTAINER

1. Search for and open the **Container** record.
2. If the **Container** is **Released**, select **Release ▶ Reopen** in order to make changes.
3. Select **Process ▶ Get Purchase Lines**.
4. Select the **Purchase Line** or select the ellipsis and **Select More** to select more than one line, then press OK.
Note that only lines for the location listed on the Container and that have available inventory to add to the Container will be shown.
5. After lines are added to the **Container**, the **Quantity** can be adjusted down if not all of that **Purchase Line** will be included on that **Container**. Once the **Quantity** is adjusted that frees up the remaining quantity to be added to a different **Container** or received outside of the **Container** process.

Purchase Lines | 🔍

CLICK TO SELECT MORE

| | Document No. ↑ | Line No. ↑ | Type | No. | Description | Location Code |
|------------------------------------|----------------|------------|------|----------|-------------------------------|---------------|
| <input checked="" type="radio"/> | 106038 | 10000 | Item | 1896-S | 4 by 6 Plastic Tray | EAST |
| <input type="radio"/> | 106038 | 20000 | Item | 1900-S | Plastic Lid | EAST |
| → <input checked="" type="radio"/> | 106038 | ⋮ | Item | 1906-S | Wide Mouth Mason Jar | EAST |
| <input type="radio"/> | 106039 | 20000 | Item | WRB-1000 | Whole Roasted Beans, Colombia | EAST |
| <input type="radio"/> | 106039 | 30000 | Item | WRB-1001 | Whole Roasted Beans, Brazil | EAST |

CN003609

Home Release Posting Navigate | Related Automate Fewer options

Get Purchase Lines Tracking Info Comments Seal Info

General

| | | | |
|-----------------------------|-----------------------|------------------------|------------------|
| Container No. | CN003609 | Voyage No. | VOY7652-88642-3 |
| Description | Containers and Coffee | Booking No. | BK79695 |
| Container Type | 20FTDRY | Posting Date | 8/4/2023 |
| Port of Loading | SGSIN | FDA Status | Pending |
| Port of Discharge | USSPQ | Container Status | Open |
| Final Destination Loc... .. | MAIN | SCAC Code | 1221 |
| Vessel No. | VES987964 | Created At | 8/4/2023 9:07 AM |

Lines | New Line Delete Line Show Document

| Document No. | Document Line No. | Item No. | Variant Code | Item Description | Quantity | Source |
|--------------|-------------------|----------|--------------|-------------------------------|----------|--------|
| → 106038 | ⋮ | 10000 | 1896-S | 4 by 6 Plastic Tray | 400.00 | |
| 106038 | | 20000 | 1900-S | Plastic Lid | 400.00 | |
| 106039 | | 20000 | WRB-1000 | Whole Roasted Beans, Colombia | 175.00 | |



POSTING SHIPPING A CONTAINER

1. Search for and open the **Container** record.
2. If the **Container** is **Released**, select **Release ► Reopen** in order to make changes, then **Release** before posting. A **BOL No** is mandatory in order to post.
3. If the Item is lot tracked then tracking must be entered prior to posting.
 - a. Drill into the **Source Quantity** on each **Container** line and select **Item Tracking Lines** on the following page.
 - b. Enter the **Lot(s)** and **Quantity** for each **Lot**.
 - c. If required enter an **Expiration Date**.
 - d. Close the pages and return to the **Container**.
4. Select **Post ► Ship Container**.
 - a. If there is no **In-transit** receiving then this will post the receipt (will fill in **Quantity Shipped** and **Quantity Received**).
If the receiving location has **Warehouse Receiving** required then this will create and post a **Warehouse Receipt**.
 - b. If the **Container** is being **In-transit** received then a **Purchase Receipt** will be created to receive the inventory into the Location on the **Purchase Order Line**.
At the same time a **Transfer Order** out of this location is created and posted as shipped.
The inventory will now be in the **In-Transit** location listed on the **Transfer Order**.

*Note: Since the inventory has now been received, invoices for freight, duty etc can be created and assigned using Item Charges to the inbound inventory against the container record or BOL No. Container now shows **Quantity Shipped**.*

| Weight | Cube | Quantity Received | Quantity Shipped |
|--------|-----------|-------------------|------------------|
| 0.00 | 0.00 | 0.00 | 400.00 |
| 0.00 | 0.00 | 0.00 | 400.00 |
| 131.25 | 28,000.00 | 0.00 | 175.00 |
| | | | |
| | | | |

POSTING RECEIVING A CONTAINER

1. Search for and open the **Container** record.
2. If the **Container** is **Released**, select **Release ► Reopen** in order to make changes, then **Release** before posting.
3. Select **Post ► Receive Container**.
4. If the final location has **Warehouse Receiving** required then this will create an open **Warehouse Receipt**.
 - a. Open the **Warehouse Receipt** from the container **Navigate ► Whse. Receipts** or by searching **Warehouse Receipts** from the search.
 - b. The **Container** number and the **BOL No** are posted through to the **Warehouse Receipt** and to the **Posted Purchase Receipt Line**.
 - c. Enter the **Qty. to Receive** and update the **Item Tracking, Qty to Handle** values.
 - d. **Post the Warehouse Receipt**.
5. If the final location does not have **Warehouse Receiving** required, then the receipt will be posted directly from the **Container** post receive process.



FINISHING A CONTAINER

1. Search for and open the **Container** record.
2. Select **Release ▶ Complete** to mark the **Container** as completed.
3. It can then be filtered out of the list of open active **Containers**.

CONTAINER TRACKING

1. Search for and open **Item Ledger Entries**. The **Container No.** is added as part of this app to track container details.
2. When applying item charges from to **posted purchase receipts**, the **Container No.** and the **BOL No.** are now available in the **Purch. Receipt Lines** page for applying charges to all items in a container.

| Purch. Receipt Lines | | | | | | | |
|----------------------------|------|----------|------------------------------|---------------|---------------|--------------|---|
| Document No. ↑ | Type | No. | Description | Location Code | Container No. | BOL No. | |
| → PR000071 | Item | LID | 46oz Jar Lid wide mouth Ball | ONWATERSCD | CN003566 | BOL110922... | ▲ |
| PR000072 | Item | LID | 46oz Jar Lid wide mouth Ball | ONWATERSCD | CN003566 | BOL110922... | |
| PR000073 | Item | JAR 46OZ | 46oz Wide Mouth Ball Jar | ONWATERSCD | CN003567 | BOL110922... | |
| PR000074 | Item | JAR 46OZ | 46oz Wide Mouth Ball Jar | ONWATERSCD | CN003567 | BOL110922... | |
| PR000075 | Item | LID | 46oz Jar Lid wide mouth Ball | RN-W-100 | | | |

3. When consolidating posted purchase receipts onto a purchase invoice, the **Container No.** and the **BOL No.** are now available in the **Purch. Receipt Lines** page.

| Get Receipt Lines | | | | | | |
|--------------------------|-----------------|--------------|-----------------------|------|-------|----------------------|
| Document No. | Container No. ▼ | BOL No. | Buy-from Vendor No. ▼ | Type | No. | Description |
| PR000080 | CN003571 | BOL111722 | V00010 | Item | SPICE | Pickling Spice Blend |
| PR000107 | CN003592 | BOL022323... | V00010 | Item | SPICE | Pickling Spice Blend |
| PR000108 | CN003593 | BOL022323... | V00010 | Item | SPICE | Pickling Spice Blend |
| PR000110 | CN003595 | BOL022323... | V00010 | Item | SPICE | Pickling Spice Blend |
| PR000111 | CN003596 | BOL022323... | V00010 | Item | 1031 | Pepper |
| PR000112 | CN003597 | BOL09764 | V00010 | Item | 1030 | Salt |

4. A link from the **Container** to the posted **Item Ledger Entries** is found under **Navigate ▶ Item Ledger Entries**.

