Container Management

Configuration

Define the settings for container management in the container management controller.

Office

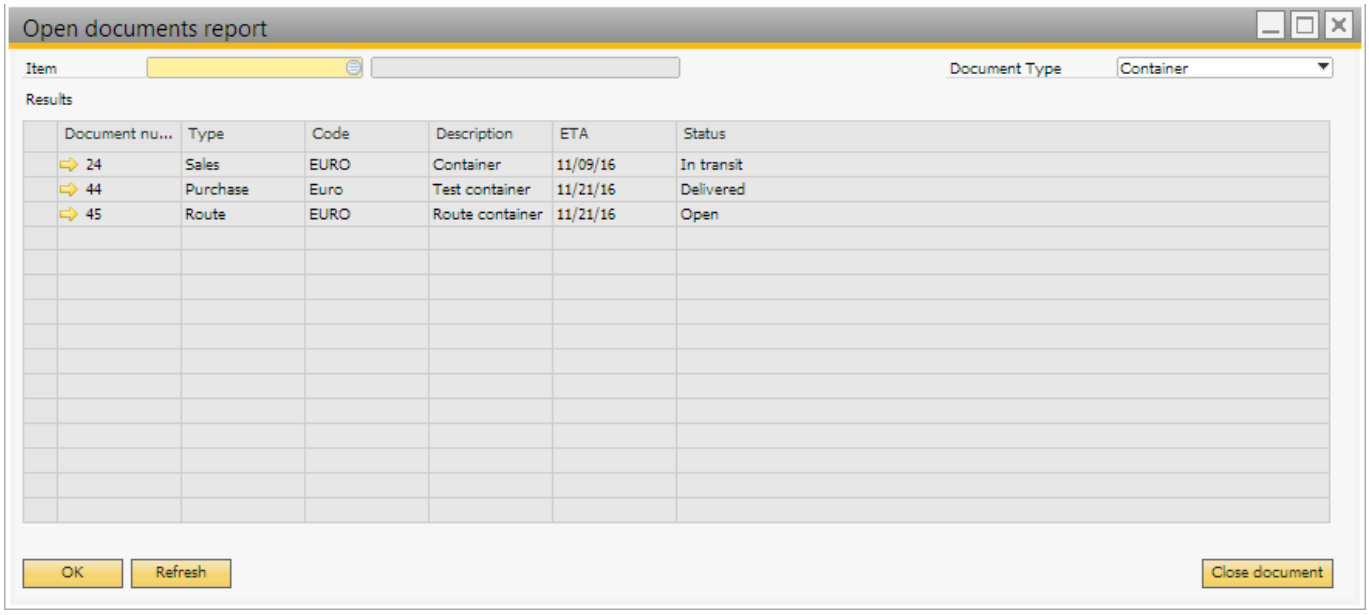
1. Open documents report

1. Open the Open documents report to see the list of open containers.

2. Select *Container* as document type. The list of open containers are displayed.

3. To close a container select the container(s) and click the `Close Document` button.

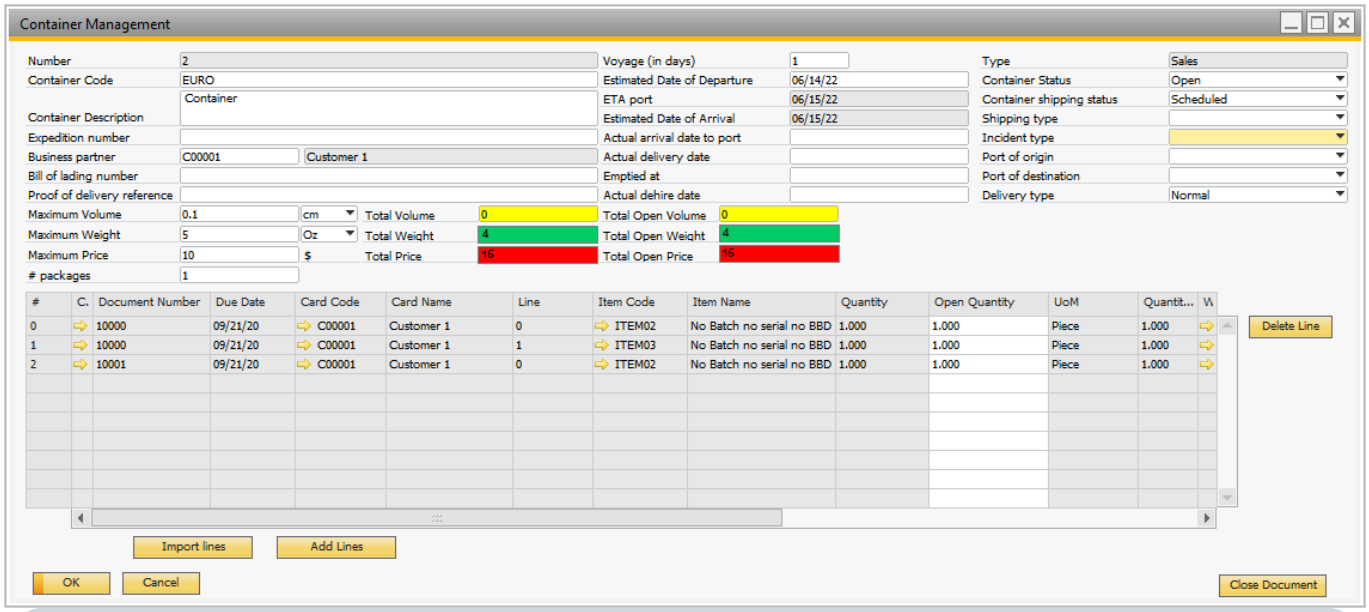
4. It is possible to filter the list based on the items in the document. Add an item to the Item field.



2. Container management form

The Container Management form can be accessed via:

- Produmex > Sales > Container management
  The document type is *Sales* by default.
- Produmex > Purchase > Container management
  The document type is *Purchase* by default.



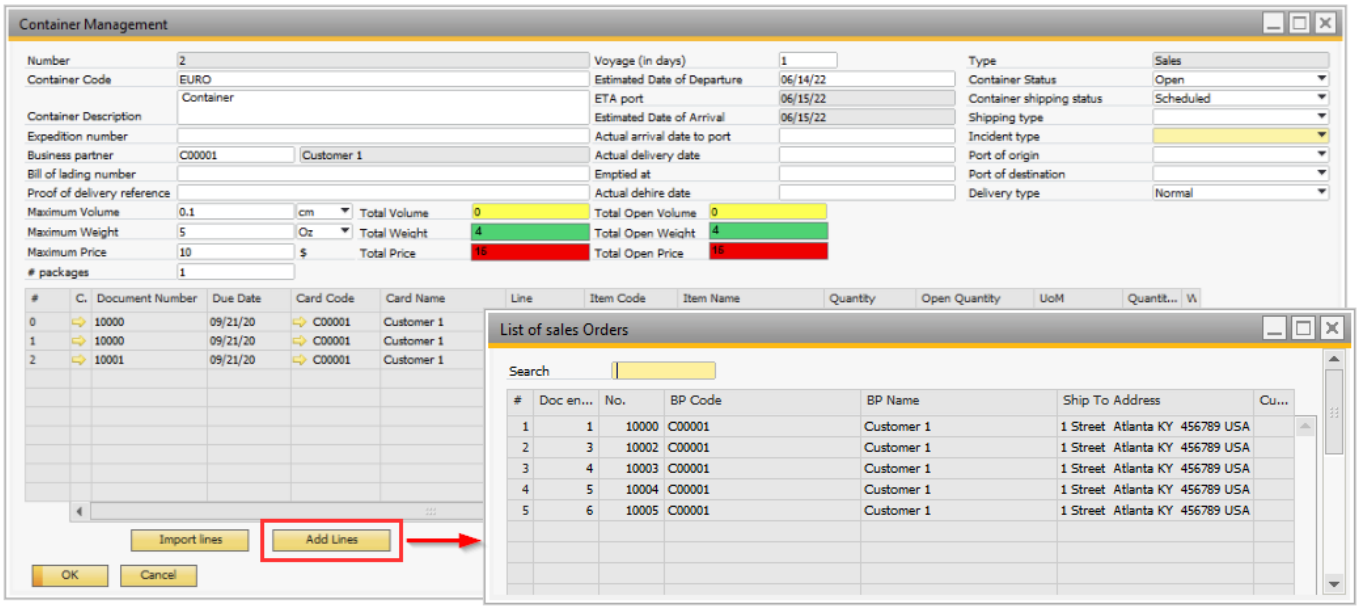
When searching for containers by adding a Container Code, always make sure the Type field, too, matches your search criteria to avoid mismatching results. Additionally, a general search prompt between asterisks results in defaulting to the first result for the designated Type.

2.1. Purchase and Sales type containers

1. Add a Business Partner. Now only documents linked to that selected business partner can be added.

2. Click the `Add Lines` button. Based on the container type the system lists purchase orders or sales orders.

Only open document lines not linked to an open container are added.

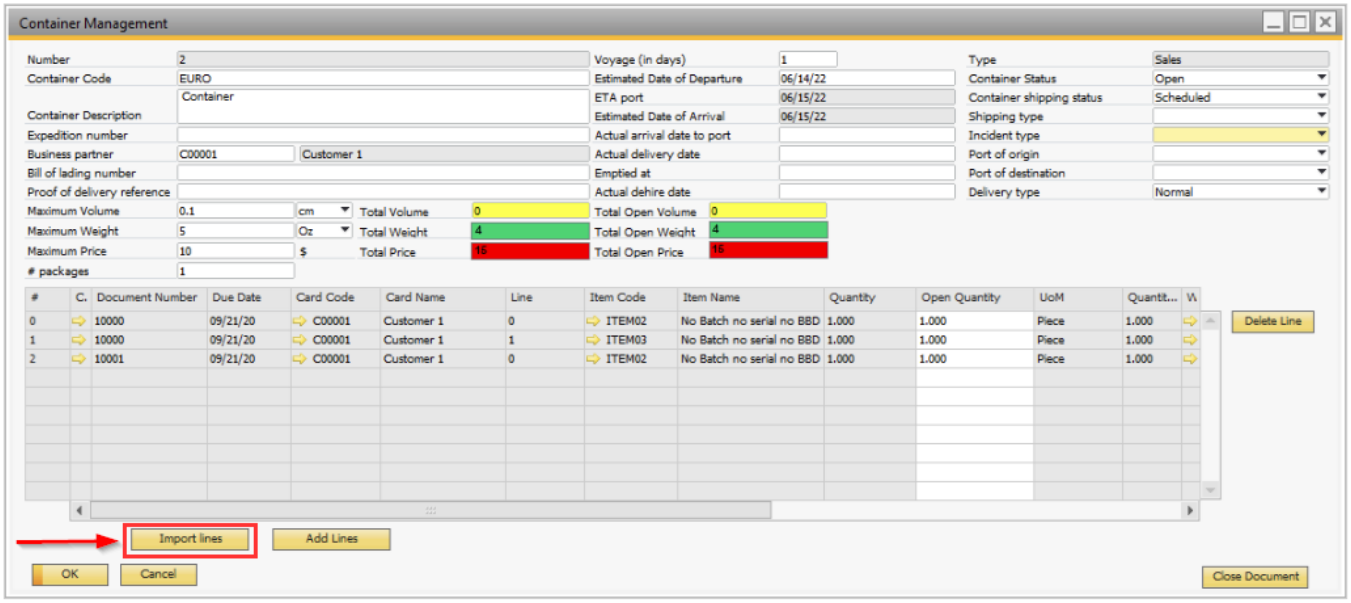


3. It is possible to ship one order line in multiple containers. After adding the order line to the first container, define the quantity in the *Open Quantity* field on the grid.

When adding this order line to the next container, the remaining quantity will be default and also the maximum quantity that can be added.

4. It is possible to import lines for containers with Purchase or Sales type from a CSV file with the `Import Lines` button.

- The name of the columns in the CSV file should be DocNum, LineNum, Quantity and optionally ObjType.
- If you have different column names or column order in the CSV file, you can use the *CSV purchase custom header* or the *CSV sales custom header* settings on the Container management controller.



5. Select the order(s) and click OK.

3. Route

3.1. Route type containers

1. Click in the *Document* field and press TAB.

2. Select the route(s) and click `Choose` to add them to the container.

Container lines of a container with Route type Route are linked to the complete route. A document (line) can only be added to one open container.

3.2. Route planning

When a route is linked to a container, an extra control is shown on the route planning screen. The code of the container is shown. The arrow on the left can be clicked to open the container this route is linked to.

Next to the container code are the values for volume, weight and price. If no maximum value is set, the total amount is shown with the corresponding uom. In case a maximum value is set, the total amount and maximum amount is shown. Also the percentage is indicated. The colors are based on the settings in the Container management controller.

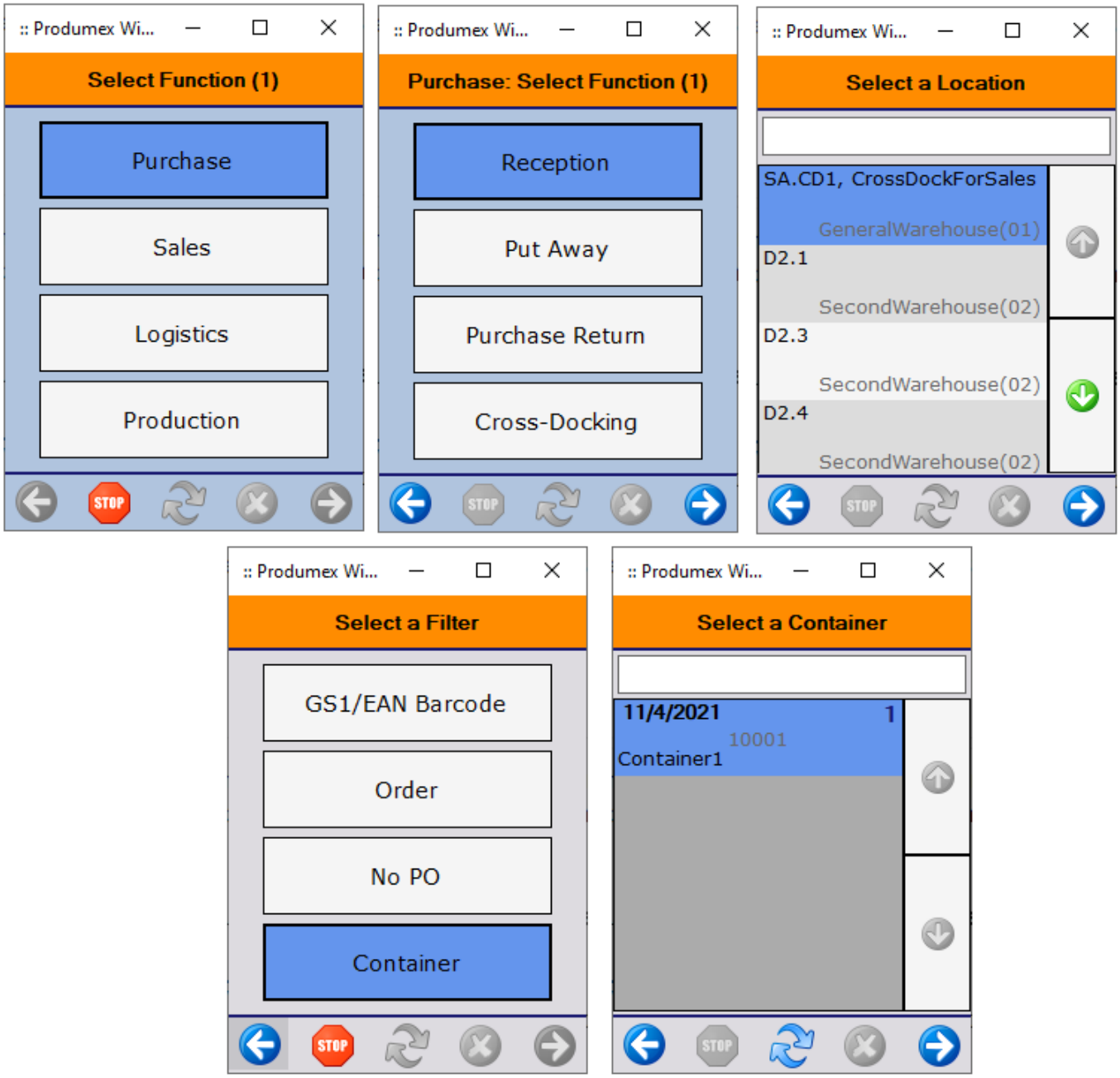


Shopfloor: Reception

During the Reception Flow, select the option Container.

A list of containers of type Purchase and with status *In transit* are shown.

After selecting the container, the normal receiving process can be continued. Only open items in the container will be received.



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