

User Manual

Aptean Food and Beverage ERP

Aptean POD

Product Documentation



Contents

- [Release notes](#)
- [2301.3.0.0](#)
- [2301.2.0.0](#)
- [2301.1.0.0](#)
- [1.0.77602.0](#)
- [Introduction](#)
- [Setup](#)
- [Manage permission sets](#)
- [System requirements](#)
- [Set up proof of delivery](#)
- [Set up shipping agents](#)
- [Move the inventory](#)
- [Import the Shipment details onto the Business Central Warehouse Shipment](#)
- [Warehouse Shipments auto-post](#)



Release notes

Article • 8/12/2024 • 1 min read

To view what's new or changed in each release of the Aptean Proof of Delivery extension, select the specific release version.

Date	Release version	Description
August 2024	2301.3.0.0	Stability release
June 2024	2301.2.0.0	Stability release
October 2023	2301.1.0.0	Stability release
January 2023	1.0.77602.0	Initial release



2301.3.0.0

Release Note • 8/12/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Proof of Delivery extension, the process has been enhanced to manage the *User Group* and *User Group Permission Set* tables. This ensures compatibility with both current and future versions of Business Central, even when these tables are deprecated.

Note

The *User Group* and *User Group Permission Set* tables are removed in Business Central, version 25.



2301.2.0.0

Release Note • 6/18/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Proof of Delivery extension, codeunit changes have been made to address the warnings encountered during pipeline execution when upgrading to Business Central version 24.2.



2301.1.0.0

Release Note • 10/18/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
154186	A conflict occurs in this extension due to the shared use of the same object-ID among multiple extensions.



1.0.77602.0

Release Note • 4/3/2023 • 1 min read

Features

With the features added in this release of the Aptean Proof of Delivery extension, you can

- Establish a seamless connection between Business Central and the Aptean Proof of Delivery app.
- Send warehouse shipments and synchronize the delivery status from the Aptean Proof of Delivery app into Business Central.
- Import the item delivery details (quantities), signature, picture, and all other relevant delivery information from the Aptean Proof of Delivery app on Business Central.

In this release, the only supported source document is a sales order.



Introduction

Article • 4/3/2023 • 1 min read

The Aptean Proof of Delivery (POD) extension enables you to optimize the proof of delivery process within your Microsoft Dynamics 365 Business Central solution. It supports streamlining real-time delivery processes and enhances customer service by sharing warehouse shipments.

When the Aptean POD Setup is configured in this extension, you can upload and/or synchronize the warehouse shipment item details to Aptean Proof of Delivery and handle delivery-related activities.



Setup

Article • 12/27/2024 • 1 min read

The following setups are required.

- [Manage permission sets](#)
- [System Requirements](#)
- [Set up proof of delivery](#)
- [Set up shipping agents](#)



Manage permission sets

Article • 12/23/2024 • 3 min read

Permission sets in Business Central define a user's access level to various features and data within this extension.

We provide the following system permission sets:

- Direct
- Indirect

Direct permission sets

Users with this permission set can perform specific actions directly without requiring additional approvals or workflows. These sets include permissions to read, modify, delete, and create data.

The direct permission set ID for this extension is *APTEANPOD77FDW*.

Indirect permission sets

Users with this permission set can perform specific actions. This is used in conjunction with other permission sets and typically involves additional conditions or approvals before an action can be completed.

The indirect permission set ID for this extension is *APTEANPODBASIC77FDW*.

User-defined permission sets

In addition to the system permission sets we provide, you can create new permission sets or copy system permission sets and modify or delete access to specific entities according to your requirements. For more information, see

[Assign permissions to users and groups](#).

Assign a permission set

1. Select the Search icon , enter **Users**, and then choose the related link.

The **Users** list page opens.

2. Navigate to the username for which you want to assign the permission set and select it.

The **User Card** page opens.

3. On the **User Permission Sets** FastTab, in the **Permission Set** field, enter the valid permission set for this extension.

The associated fields are automatically updated based on the entered value. The user has the necessary



Aptean POD

permissions to use the features of the Aptean Proof of Delivery extension, ensuring secure and role-based access.



System requirements

Article • 4/3/2023 • 7 min read

The system requirements for the Aptean Proof of Delivery Connector is as follows:

- An on-premises or a cloud version of Business Central. The compatible versions of BC are:
 - Business Central 19
 - Business Central 20
 - Business Central 21

Setup Parameters


A set of parameters are provided to call the Aptean Proof of Delivery app. With these parameters, you must perform some steps and configuration activities. The parameters include:

- Aptean POD URL
- Aptean User ID
- Password
- Client Number
- POD System ID
- Acid

Install the Aptean POD Extension

You need to install the Aptean Proof of Delivery (POD) extension into your Dynamics 365 Business Central system. You can find the Aptean POD extension in the Microsoft AppSource.

The following procedure describes how to install the Aptean POD extension:

1. Select the Search icon , enter **Extension Management**, and then choose the related link.
The **Extension Management** page opens.
2. On the **Aptean POD** extension, click the context menu and select **Install**.
The **Extension Installation** page opens.
3. Select **Next**.
The Review Extension Information Before Installation details is displayed.
4. Select the **I accept the terms and conditions** check box.
5. Select **Install**.
A dialog box appears and displays the following message:



The Aptean Proof of Delivery extension was successfully installed. All active users must sign out and sign in again to see the navigation changes.

6. Select **OK** to close the dialog box.

Assign an Aptean Proof of Delivery Permission set to a user

The following procedure describes how to assign permission to a user.

1. Select the Search icon , enter **Users**, and then choose the related link.
The **Users** page opens.
2. Select the user to whom you want to assign an Aptean POD permission set.
3. On the action bar, select **Manage > Edit**.
The **User Card** page opens.
4. On the **User Permission Sets** FastTab, in the **Permission Set** field, select the permission set that you want to assign to the user.

Import Configuration Package

A set of default setup tables imports automatically by performing the **Default Mapping Data** action on the **Aptean POD Setup** page.

This results in the following:

- New permission sets that have been developed for Aptean POD are imported into the database.
- Records are added to the Aptean Int. Table Mapping List and Aptean Table Mapping List.
- A number of tables are processed, records inserted or amended, and errors found.

Set up job queue entry for warehouse shipment



You can use the job queue entries to automatically import the warehouse shipment information from the Aptean Proof of Delivery app and to post the documents.

The following procedure describes how to set the job queue for the automatic posting of documents. The setup is similar for importing warehouse shipment details from the Aptean Proof of Delivery app.

Note

If you set the job queue for import details from the Aptean Proof of Delivery app, then you must ensure that you have provided the correct value for the **Object Type to Run** and **Object ID to Run** fields.



1. Select the Search icon , enter **Job Queue Entries**, and then choose the related link.
The **Job Queue Entries** page opens.
 2. On the action bar, click **New**.
The **Job Queue Entry Card** page opens.
 3. On the **General** FastTab, perform the following steps:
 - a. In the **Object Type to Run** field, enter *Codeunit*.
 - b. In the **Description** field, enter a description for the job.
 - c. In the **Object ID to Run** field, if you want to post the warehouse shipment, enter the ID of the **PostWhseShipmentSchedulerFDW** code unit and enter *Warehouse Shipment* in the **Parameter String** field.
 - d. In the **Earliest Start Date/Time** field, select the earliest date and time the job can run.
 4. On the **Recurrence** FastTab, perform the following steps:
 - a. To specify the frequency of the job, perform one of the following steps:
 - Turn on the days on which the job must run.
 - In the **Next Run Date Formula** field, select the date formula to calculate the next time the recurring job must run
For example, to have the job run once a day, specify 1D.
 - b. In the **Starting Time** field, select the earliest time of the day that the recurring job must run.
 - c. In the **Ending Time** field, select the latest time of the day that the recurring job must run.
 - d. In the **No. of Minutes between Runs** field, select the minimum number of minutes that will elapse between the job runs.
-  **Note**

This field is only applicable when the job is set to be a recurring job.
- a. In the **Inactivity Timeout Period** field, select how many minutes can pass before a recurring job with the *On Hold* status is automatically restarted.
5. On the action bar, select **Process > Set Status to Ready**.



Set up proof of delivery

Article • 4/3/2023 • 4 min read

When making calls to the Aptean Proof of Delivery app, a set of parameters are entered on the **Aptean POD Setup** page. The following procedure describes how to integrate BC and the Aptean Proof of Delivery app seamlessly.

Set Aptean POD Setup page:

1. Select the Search icon , enter **Aptean POD Setup**, and then choose the related link.
The **Aptean POD Setup** page opens.
2. Enter the URL, User ID, Password, Client Number, POD System ID, and Acid in the respective fields.
3. Select the attributes in the **Attribute** fields.
4. Select the item journal template in the **Item Journal Template** field for transferring inventory to the Warehouse Shipments Route bin code.
5. Select the warehouse journal template in the **Warehouse Journal Template** field for transferring inventory to the Warehouse Shipments Route bin code.
6. Turn on the **Enabled** toggle to use the Aptean Proof of Delivery app within Business Central.
7. On the action bar, click **Test API Connection**.

The test result is displayed in a dialog box. The system is configured and ready to send data to the Aptean Proof of Delivery app.

Aptean POD Setup page functions

The following functions are available on the Aptean POD Setup page menu:

Function	Description
Test API Connection	This function is used to check the connection of the API.
Import from Aptean POD	This function retrieves the updates of the drop.
POD Details	This opens the POD Details page, which is also available from the Warehouse shipment> Actions > Aptean POD > POD Details . The status of the drop and all delivery information is shown on this page.



Insert Default Mapping

This function is used to insert the default mapping table data. The mapping table data is used during the POD integration process.



Set up shipping agents

Article • 4/3/2023 • 5 min read

You can define which shipping agents are used for transporting the items in the Aptean Proof of Delivery app. You must first set it on the **Shipping Agents** page to be able to assign the specific shipping agent on the warehouse shipment.

Note

You can assign the specific shipping agents to the Aptean Proof of Delivery app only when the **Include in Aptean POD** check box is selected on the Shipping Agents page for that record.

To set the Shipping Agents:

1. Select the Search icon , enter **Shipping Agents**, and then choose the related link.
The **Shipping Agents** page opens.
2. Select the **Include in Aptean POD** check box to indicate that this agent should be assigned in the Aptean Proof of Delivery app.

Send POD Information

You can send the warehouse shipment item details to the Aptean Proof of Delivery app, whether the sales order was sent to Aptean TMS or not.

To learn more about Aptean TMS, click [here](#).

Note

If the source document is not routed in the Aptean TMS app, then you must ensure that the manifest group exists in the Aptean Proof of Delivery app before sending a warehouse shipment. Otherwise, you will receive an **API Response Message - Manifest Group in the central console does not exist**.

The following procedure describes how to send the warehouse shipment details to the Aptean Proof of Delivery app:

1. Select the Search icon , enter **Warehouse Shipment**, and then choose the related link.
The **Warehouse Shipment** list page opens.
2. Select the desired record from the list.



3. On the **Shipping** FastTab, in the **Shipping Agent Code** field, enter the relevant shipping agent.

 **Note**

The **Include in Aptean POD** check box must be selected for the relevant shipping agents. If not, you will receive an error message.

4. Create warehouse pick.
5. After you have performed the pick and placed the items in the shipping area, select the **Register Pick** action to register the items.
6. On the **Warehouse Shipment** page, on the action bar, go to **Actions > Aptean POD > Send to Aptean POD**. The warehouse shipment details are sent to the Aptean Proof of Delivery app.

Aptean POD Menu

The following actions can be performed on the **Aptean POD** action bar of the **Warehouse Shipment** page.

- **Send to Aptean POD** – To send the warehouse shipment details to the Aptean Proof of Delivery app.
- **Load Truck** – To move the inventory from the shipping bin into the specific route bin designated for the truck.
- **Import from Aptean POD** – To receive updates about the status of drops and associated delivery data from the Aptean Proof of Delivery app.
- **POD Details** – To view the specific warehouse shipment, received delivery details and the status of the drop from the Aptean Proof of Delivery app.

Overview of POD Details

On the Warehouse Shipment page, go to **Actions > Aptean POD > POD Details**.

You can also open the **POD Details** page by clicking the number, e.g., "4", in the **POD Quantity** field in the document line of the warehouse shipment.

The **POD Details** page displays the delivery details and status of the drop, received from the Aptean Proof of Delivery app.

You can use the following events under the **Related** menu on the action bar of the **POD Details** page:

- **POD Events** - to view the truck schedule.
- **POD Attachments** - to view drop related attachments.
- **POD Results** – to view the debrief results.



Move the inventory

Article • 4/3/2023 • 3 min read

When you perform the **Load Truck** function on the **Aptean POD** menu of the **Warehouse Shipment** page based on the **Route Bin** page, the inventory is moved from the shipping bin into the specific route bin designated for the truck. In addition, the inventory in Business Central is updated when the truck is loaded to ensure it is accurately recorded.


In the **POD Status** field, the value is updated as *Loaded* if the inventory is loaded successfully.

The Load Truck function operates differently, depending on whether Aptean TMS is installed:

- **Scenario 1:** If the Aptean TMS is installed, you receive the **Route No** (this number holds the bin code) from the Aptean Routing and Scheduling app. Then, the **Load Truck** is performed on the **Warehouse Shipment** page, the **Route Bin Code** is updated, and the inventory picked on the Warehouse shipment lines is moved from Bin to Route Bin.
- **Scenario 2:** If the Aptean TMS is not installed, you can manually select a specific route bin code when there are multiple route bin that exists. The value is automatically filled in the **Route Bin Code** field if one route bin code is available after performing the **Load Truck** function.
The inventory picked on the Warehouse shipment lines is moved from Bin to Route Bin.

Set Route Bin Code

The following procedure describes how to set the route bin code.

1. Select the Search icon , enter **Route Bin**, and then choose the related link.
The **Route Bin** page opens.
2. On the action bar, click **New**.
3. In the **Route Code** field, enter the route represented by this bin.
4. In the **Shipment Code** field, select the day on which the shipment departs.
5. In the **Location Code** field, select the location code from which the items are shipped.
6. In the **Bin Code** field, select the designated bin for the route.



Import the Shipment details onto the Business Central Warehouse Shipment

Article • 4/3/2023 • 4 min read

The Aptean Proof of Delivery app simplifies delivery-related activities by capturing the data processes and enhancing real-time visibility of all the activities. This captured data is received back to business central, and the information is displayed on the **Warehouse Shipment** page.

When the Aptean Proof of Delivery app has routed the warehouse shipment, you can load and view the delivery details for one warehouse shipment or all of them.

To view the shipping information related to one warehouse shipment:

- On the relevant **Warehouse Shipment** page, select **Actions > Aptean POD > Import from Aptean POD**.

To view all the shipping delivery details for all the warehouse shipment documents:

- On the **Aptean POD Setup** page, select **Import from Aptean POD**.

The shipping details will populate on the **Warehouse Shipment** page in the **Aptean Proof of Delivery** FastTab – as shown here:

The following fields are updated in the **Aptean Proof of Delivery** FastTab to view the shipment status based on the actions performed in the Aptean Proof of Delivery app.

Field	Description
Include in Aptean POD	This indicates that the selected shipping agent is utilized in the Aptean Proof of Delivery app.
POD Status	<p>This is used to view the status of the shipment process. There are six process statuses displayed in the POD process:</p> <p><i>Loaded</i> – The items are loaded successfully after executing the Load Truck function.</p> <p><i>In route</i> – The warehouse shipment details are sent to the Aptean Proof of Delivery app.</p> <p><i>Partially delivered</i> – The quantity delivered is less than the total quantity in the document line.</p> <p><i>Completely delivered</i> – The quantities of the item on the warehouse shipment line are all delivered successfully.</p> <p><i>Failed</i> – The Aptean Proof of Delivery app cannot receive the BC data.</p> <p><i>Over-Delivery</i> – More items were delivered than expected.</p> <p>Note: If the Aptean Proof of Delivery app does not allow over-delivery, the warehouse</p>



	shipment data is sent back to Business Central without performing any over-delivery activities.
Sent to Aptean POD	This indicates whether the warehouse shipment is sent to the Aptean Proof of Delivery app or not.
POD Message	This is used to view the status received from the Aptean Proof of Delivery app.
Last Modified Date and Time	This indicates the date and time when the warehouse shipment was last modified.
Last Sent Date and Time	This indicates the date and time when the warehouse shipment was sent to the Aptean Proof of Delivery app.
POD Quantity	This is used to view the total number of quantities that are delivered via the Aptean Proof of Delivery app. This displays the sum of Posted and available POD quantity on the lines of this Warehouse Shipment Number.



Warehouse Shipments auto-post

Article • 4/3/2023 • 1 min read

You can automatically post warehouse shipments using the **Auto Post Warehouse Shipment** toggle on the **Aptean POD Setup** page. When the **POD Quantity** field value (greater than zero) is updated from the Aptean Proof of Delivery app, the system posts the shipment automatically based on the configuration setup on the [Job Queue Entries](#) page.

The document must adhere to the following criteria in order to automatically post the warehouse shipments.

- The **Auto Post Warehouse Shipment** toggle must be turned on.
- The warehouse shipment document status must be *Released*.
- The value of the **POD Quantity** must be greater than zero.
- The toggles **Include in Aptean POD** and **Sent to Aptean POD** toggles must be turned on.

Note

The auto-post function does not support the specific warehouse shipment line with an Over-delivery because the **Qty. to Ship** field value is populated as zero after importing the delivery details from the Aptean Proof of Delivery app.

