

## Installment Payment Terms User Manual

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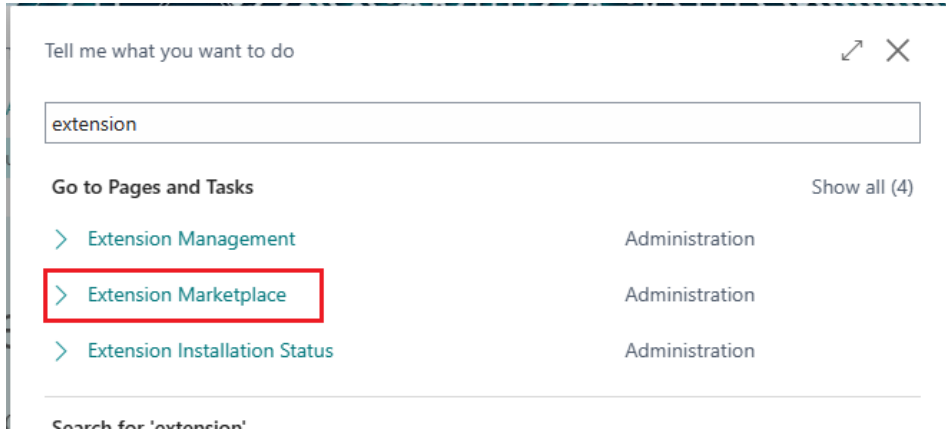
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## Installation & Setup

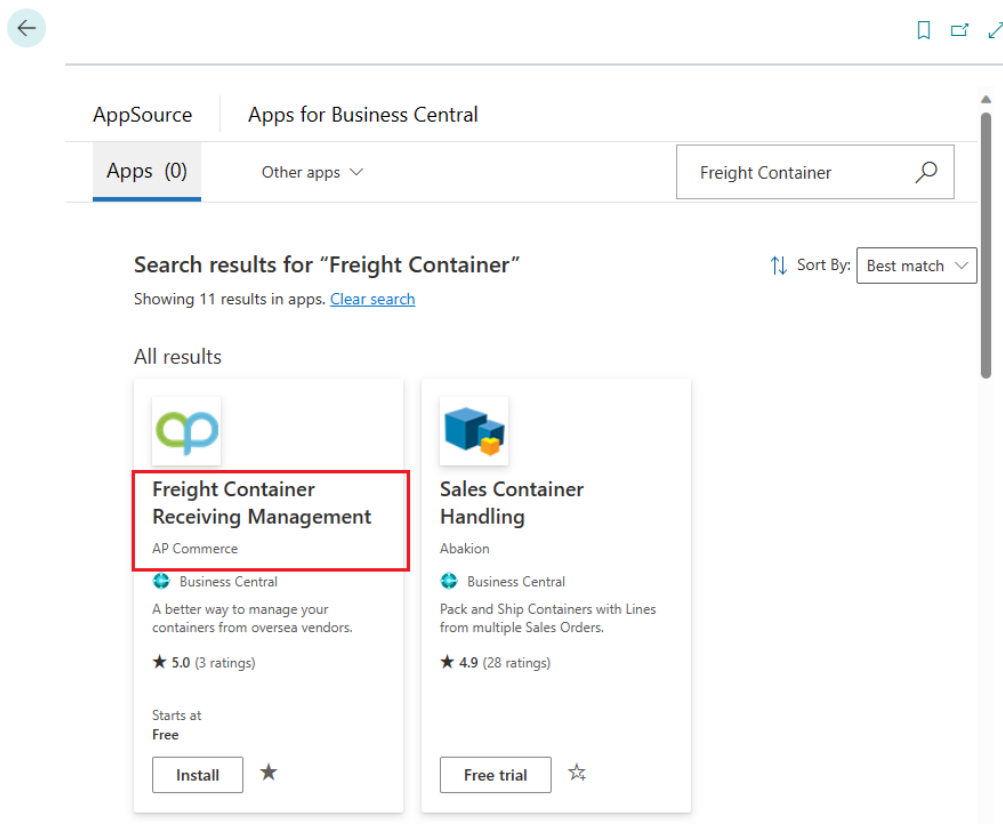
The Installment Payment Terms app is licensed through Microsoft, follow these instructions to license and initialize the app.

### Licensing

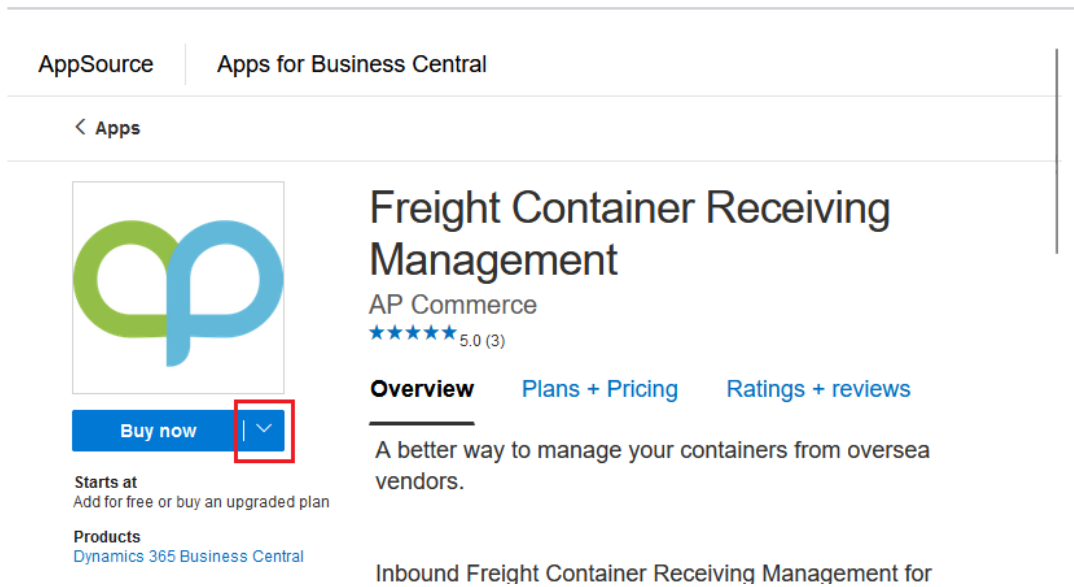
- 1) Go to the Extension Marketplace and click on the app you want to subscribe to.



- 2) Search "Installment Payment Terms" in the AppSource to find the Installment Payment Terms offering and open the information page.




3) On the **Drop Down** next to **Buy Now**.



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## Freight Container Receiving Management

AP Commerce  
★★★★★ 5.0 (3)

**Overview**   [Plans + Pricing](#)   [Ratings + reviews](#)

**Buy now** | ▾

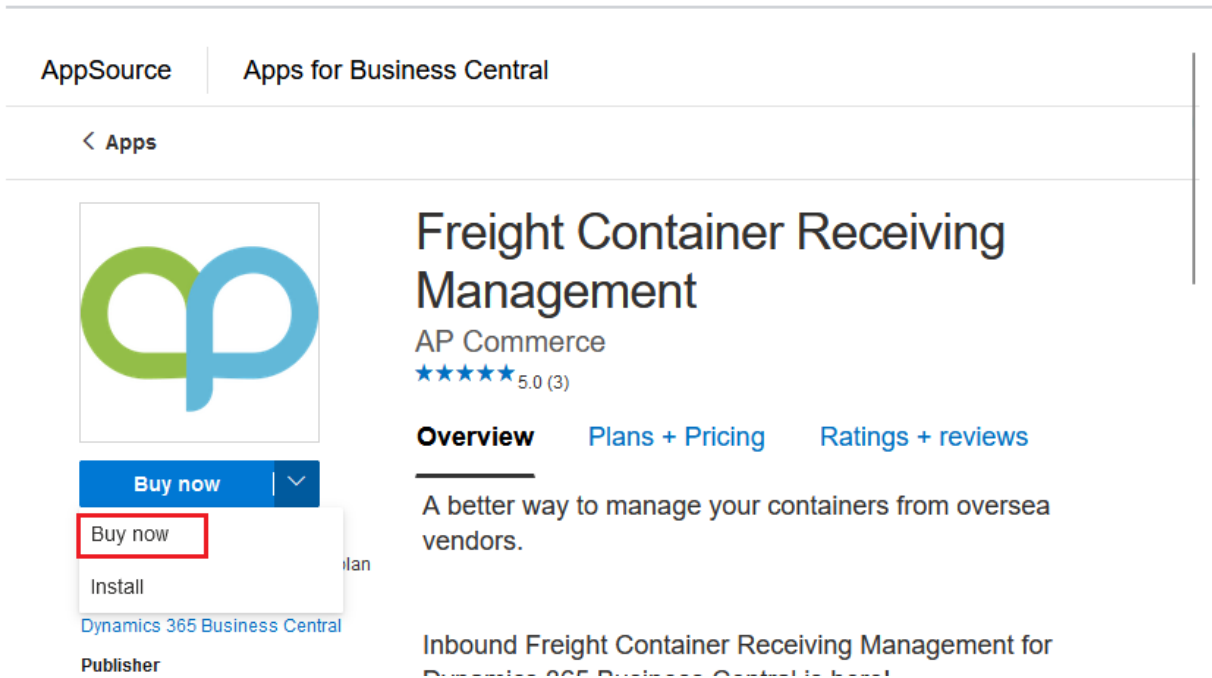
**Starts at**  
Add for free or buy an upgraded plan

**Products**  
[Dynamics 365 Business Central](#)

A better way to manage your containers from overseas vendors.


Inbound Freight Container Receiving Management for

4) Click on **Buy Now**.



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## Freight Container Receiving Management

AP Commerce  
★★★★★ 5.0 (3)

**Overview**   [Plans + Pricing](#)   [Ratings + reviews](#)

**Buy now** | ▾

- Buy now**
- Install

[Dynamics 365 Business Central](#)


**Publisher**

A better way to manage your containers from overseas vendors.

Inbound Freight Container Receiving Management for


5) Click on **Buy now**

Apps > **Freight Container Receiving Management**



## Freight Container Receiving Management

by AP Commerce

 Dynamics 365 Business Central

★ 5.0 (3 ratings)

Starts at **Free** **Buy now** Contact me ★ Saved

Overview   Plans + Pricing   Ratings + reviews   Details + support

Plan	Description
Small Team Plan	Small Team Plan (4-10 users: \$30 per user):


6) Select a plan and click **Next**.

Apps > Freight Container Receiving Management > **Checkout**

## Checkout

- Plan
- Price + billing
- Payment
- Complete purchase

### Select a plan



## Freight Container Receiving Management

**Small Team Plan** Free trial

Description

**Small Team Plan (4-10 users: \$30 per user):**  
Perfect for small teams of 4 to 10 users. Enjoy cost-effective solutions tailored to the needs of compact teams.

**Next**

7) Go through the Billing information pages.



Apps > Freight Container Receiving Management > **Checkout**

## Checkout

- Plan
- Price + billing**
- Payment
- Complete purchase

### Price + billing

**Billing term** ⓘ \*

1-month subscription

**Price/payment options** ⓘ \*

First month free, then \$30.00/user/1-month


**Recurring billing** ⓘ \*

On

Off

**Number of users (4-10) \***

Up next, choose your payment method:

<p><b>Credit card</b></p> <p>Use a credit card to make an online payment.</p> <p>Accepted payment methods:</p> 	<p><b>Invoice pay <i>New!</i></b></p> <p>If your organization has been approved for payment by invoice, select Invoice pay on the next page to pay with a check or wire transfer.</p> <p><a href="#">Learn more about paying by invoice</a> ↗</p>
--	---

8) Enter your payment information.

## Checkout

Plan

---

Price + billing

---

**Payment**

---

Complete purchase

### Payment

Product name	Price (USD)	Quantity	Subtotal (USD)	
Offer	Freight Container Receiving Management	First month free, then \$30.00/user/one-time payment	4	\$120.00 for 1 month
Plan	Small Team Plan	<span style="background-color: #e8f5e9;">Free trial</span>		
Billing term	1-month subscription			
Recurring billing	On			

**Sold-to address \***  
Enter the address of the legal entity responsible for payment and identified on the invoice. The address provided here is used to determine your tax rate.

**Billing account**

AP Commerce, Inc.
▼

[Edit](#)

AP Commerce, Inc.  
12304 Santa Monica Blvd. STE 300  
Los Angeles, CA 90025-2593  
US

---

**Bill to \***

Select the billing profile you want to use for this purchase. You can also edit an existing profile. [Learn more about billing profiles](#)

**Billing profile**

APC
▼

[Edit](#) + [Add new](#)

Back

Accept agreement & place order

9) Click on the **Accept agreement & place order**.

### Summary

Subtotal after trial (before tax):

Estimated taxes: ⓘ

**Total:**

### Free trial

You'll start being charged after the first month of free trial for this subscription.

Back

Accept agreement & place order


10) Click on **Assign license** to open the **Microsoft 365 admin center**.

## Checkout

- ✓ Plan
- ✓ Price + billing
- ✓ Payment
- **Complete purchase**

### Complete purchase

✓ Thank you for your purchase

 **Freight Container Receiving Management**

✓ Your order was processed successfully.

#### Offer details

Offer  
Freight Container Receiving Management

Plan  
Small Team Plan

Billing term  
1-month

Price/payment options  
First month free, then \$30.00/user/1-month + tax

Recurring billing ⓘ  
On

Total  
\$0.00

#### Invoice details

Sold to  
AP Commerce, Inc.

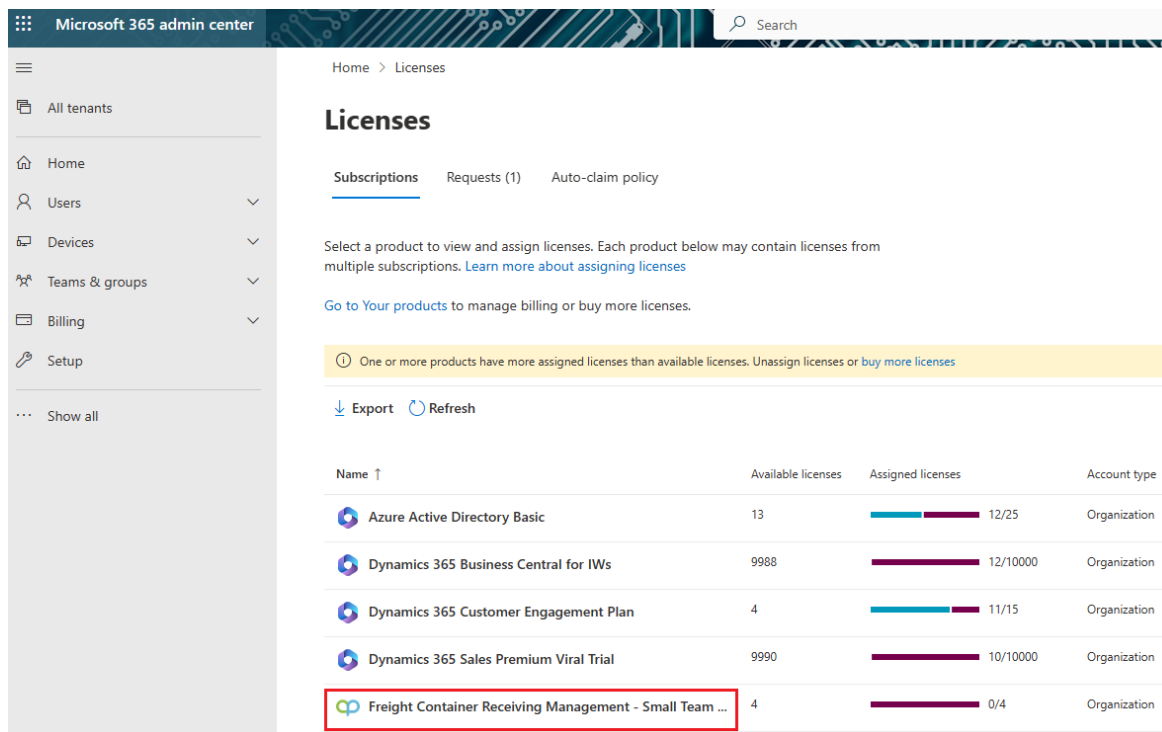
#### Next steps

Now, assign the licenses you purchased to users in your tenant via [Admin center](#). From there you can proceed to install this app. To manage your licenses anytime, click on your account at the top right, open [Admin center](#) and go to Licenses.

Back

**Assign licenses**

11) Click on the app that is just purchased.




The screenshot shows the Microsoft 365 Admin Center interface. The left sidebar contains navigation options: All tenants, Home, Users, Devices, Teams & groups, Billing, Setup, and Show all. The main content area is titled 'Licenses' and includes tabs for Subscriptions, Requests (1), and Auto-claim policy. A message states: 'One or more products have more assigned licenses than available licenses. Unassign licenses or buy more licenses.' Below this, there are 'Export' and 'Refresh' buttons. A table lists the following products:

Name ↑	Available licenses	Assigned licenses	Account type
Azure Active Directory Basic	13	12/25	Organization
Dynamics 365 Business Central for I/Ws	9988	12/10000	Organization
Dynamics 365 Customer Engagement Plan	4	11/15	Organization
Dynamics 365 Sales Premium Viral Trial	9990	10/10000	Organization
<b>Freight Container Receiving Management - Small Team ...</b>	4	0/4	Organization

12) Click on **Assign Licenses** to assign the licenses to the users that will be using the app.

[Home](#) > [Licenses](#) > License details

[Back to Licenses](#)

 **Freight Container Receiving Management - Small Team Plan**  
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**Licenses**

**4 available**

0 assigned of 4 total

[Install this product](#)

**Users**

Manage and view licenses for your users.

[+ Assign licenses](#) [↓ Export users](#) [↻ Refresh](#)

<input type="checkbox"/>	Name	Email	Type
--------------------------	------	-------	------

13) Click on **Install this Product** to install the app in your tenant.

[Back to Licenses](#)

 **Freight Container Receiving Management - Small Team Plan**  
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**Licenses**

**3 available**

1 assigned of 4 total

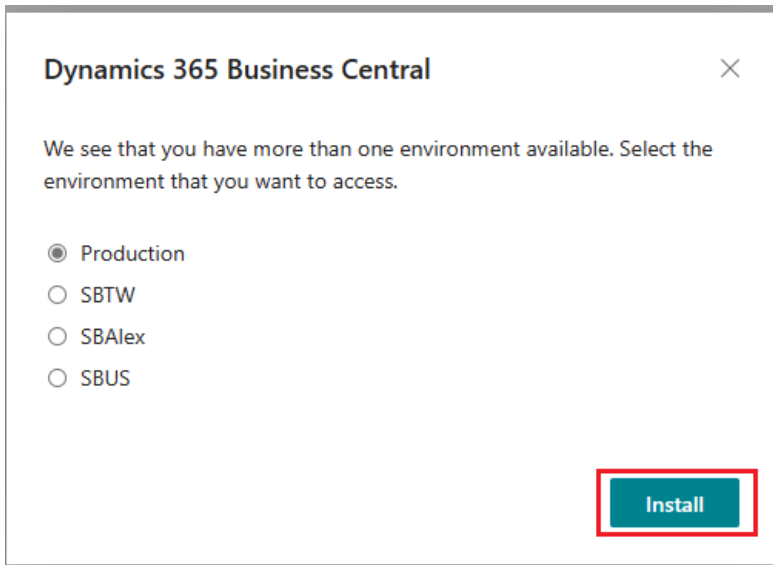
[Install this product](#)

**Users**

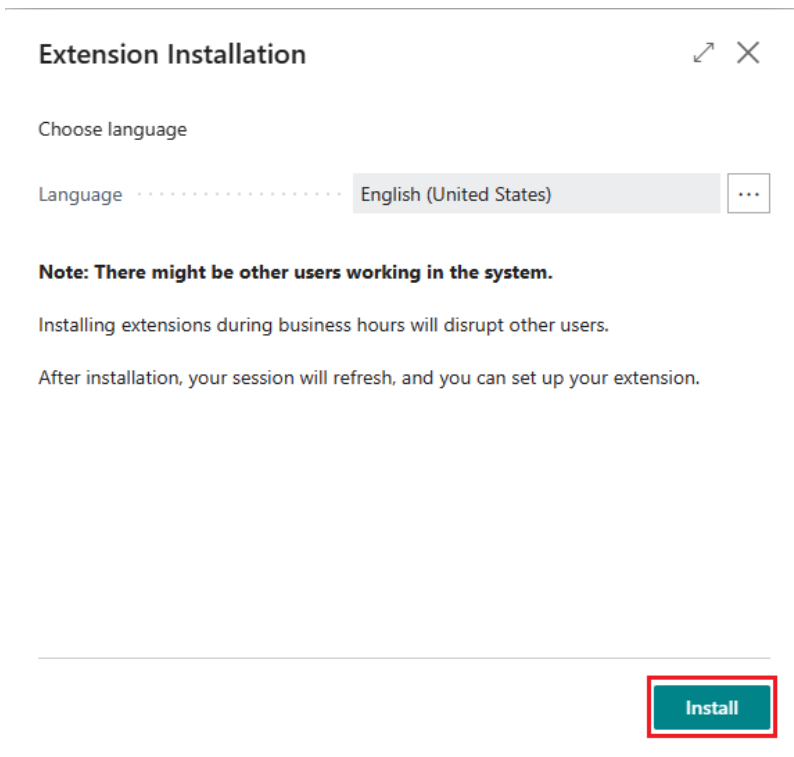
Manage and view licenses for your users.

14) Select an environment and click on **Install**.





15) Choose a language and click on **Install**.




## Canceling the Subscription

- 1) To Cancel Subscription, open the **Microsoft 365 admin center** and go to **Billing >> Your Products**.
- 2) Click on the app you want to cancel the subscription for and click on **Cancel Subscription**.

# Setup the Installment Payment Terms App

## Assign User Permission Set

- 1) Choose the  icon to enter “**User**” and click on the related link to open the **Users** list.
- 2) On the Users list, select users that will require permissions to the Installment Payment Terms app.
- 3) On each of the selected **User Cards**, go to the **User Permission Sets** tab, add the necessary permission sets based on the role of the user:
  - a) **APEINSTALLPMTADMINE**
    - i) Assign this to the users that are considered administrators of the app and responsible for setting up and maintaining Additional Payment Terms.
    - ii) These users must be licensed through the Microsoft 365 admin center.
  - b) **APEINSTALLPMTE**
    - i) Assign this to the users that are considered users of the app, these users should be any user that can invoice Sales or Purchase documents.
    - ii) These users must be licensed through the Microsoft 365 admin center.
  - c) **APEINSTALLPMTREADE**
    - i) This should be assigned to any users that do not have the ability to invoice sales documents.
    - ii) These users **do not need to be licensed**, but this permission set must be assigned to prevent any licensing errors while using areas touched by the app. (ex.: the flowfield on the Payment Terms page.)

Permission Set ↑	Name ▼	Extension Name	Scope ↑
→ <a href="#">APEINSTALLPMTREADE</a>	Installation Payment Read Only	Installation Payment Terms	System
<a href="#">APEINSTMNTPMTE</a>	Installation Payment Processor	Installation Payment Terms	System
<a href="#">APEINSTPMTADMINE</a>	Installation Payment Admin	Installation Payment Terms	System

## User Guide

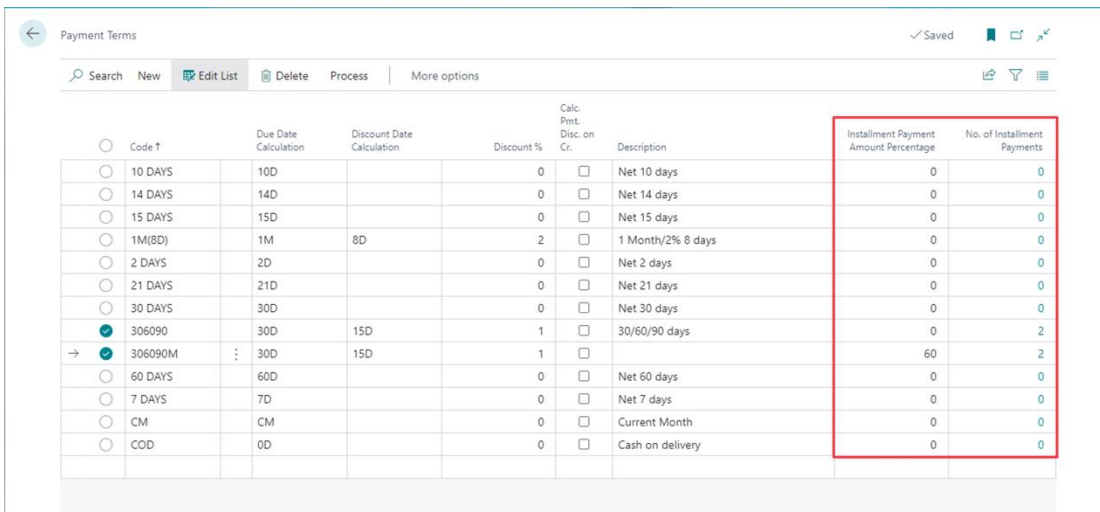
Companies need to create installment payments for customers and vendors. Users may run into challenges creating installments using out-of-the-box Business Central Payment Terms. The installments need to be added manually to Purchase and Sales Orders. The Installment Payment Terms app will help you easily split payments into installments. Use the payment term codes with additional installment payment terms on Purchase and Sales Orders/Invoices. After posting a purchase or sales invoice, the system will automatically split the payment according to the installment payment setup.

# Creating the Payment Terms

## Create Installment Payment Terms

1) Open the payment terms page and enter a new **Payment Term**.

- There are two columns added to the **Payment Terms** table to manage **Installment Payments**.
  - **Installment Payment Amount Percentage:** Enter the percentage of the order total for this part of the payment term split.
  - **No. of installment payments:** This is a flowfield that shows the number of Installment Payment splits that have been associated to this Payment Term.



	Code †	Due Date Calculation	Discount Date Calculation	Discount %	Calc. Pmt. Disc. on Cr.	Description	Installment Payment Amount Percentage	No. of Installment Payments
<input type="radio"/>	10 DAYS	10D		0	<input type="checkbox"/>	Net 10 days	0	0
<input type="radio"/>	14 DAYS	14D		0	<input type="checkbox"/>	Net 14 days	0	0
<input type="radio"/>	15 DAYS	15D		0	<input type="checkbox"/>	Net 15 days	0	0
<input type="radio"/>	1M(8D)	1M	8D	2	<input type="checkbox"/>	1 Month/2% 8 days	0	0
<input type="radio"/>	2 DAYS	2D		0	<input type="checkbox"/>	Net 2 days	0	0
<input type="radio"/>	21 DAYS	21D		0	<input type="checkbox"/>	Net 21 days	0	0
<input type="radio"/>	30 DAYS	30D		0	<input type="checkbox"/>	Net 30 days	0	0
<input checked="" type="radio"/>	306090	30D	15D	1	<input type="checkbox"/>	30/60/90 days	0	2
→ <input checked="" type="radio"/>	306090M	30D	15D	1	<input type="checkbox"/>		60	2
<input type="radio"/>	60 DAYS	60D		0	<input type="checkbox"/>	Net 60 days	0	0
<input type="radio"/>	7 DAYS	7D		0	<input type="checkbox"/>	Net 7 days	0	0
<input type="radio"/>	CM	CM		0	<input type="checkbox"/>	Current Month	0	0
<input type="radio"/>	COD	OD		0	<input type="checkbox"/>	Cash on delivery	0	0

## Add Additional Payments Terms

1) Click on the number in the **No. of Installment Payments** field to drill into and open the **Additional Installment Payment Terms** page.

2) Setup any additional Payment Terms

- **Due Date Calculation:** Date formula to calculate the additional payments.
- **Discount Date Calculation:** Date formula to calculate payment discounts.
- **Discount %:** Discount percentage to use if paid within the discount period.
- **Installment Payment Amount Percentage:**

Additional Installment Payment Terms

Search + New Edit List Delete

Due Date Calculation	Discount Date Calculation	Discount %	Installment Payment Amount Percentage	Description
→ 60D	45D	2.00	0	
90D	70D	3.00	0	

**NOTE:** If there are rounding issue, the system will add the difference the last payment entry.

Posting Date	Due Date	Document Type	Document No.	Customer No.	Description	Original Amount	Amount	Sales (\$)
6/27/2022	9/25/2022	Invoice	103040-3	20000	Installment Payment 3/3 for 103040	33.34	33.34	0.00
6/27/2022	8/26/2022	Invoice	103040-2	20000	Installment Payment 2/3 for 103040	33.33	33.33	0.00
6/27/2022	7/27/2022	Invoice	103040	20000	Installment Payment 1/3 for 103040	33.33	33.33	100.00

### Add Installment Payment Amount Percentage

You can also enter different percentage per payment installment.

- 1) Setup the payment percentage on the **Payment Terms** page for the first installment.

Payment Terms: All Search New Delete Edit List Process More options

Code	Due Date Calculation	Discount Date Calculation	Discount %	Calc. Pmt. Disc. on Cr. Memos	Description	Installment Payment Amount Percentage	No. of Installment Payments
306090M	30D	15D	1			60	2
306090	30D	15D	1		30/60/90 days	0	2

- 2) Setup additional payment percentages on the **Additional Installment Payment Terms** page.

Additional Installment Payment Terms

Search + New Edit List Delete

Due Date Calculation	Discount Date Calculation	Discount %	Installment Payment Amount Percentage	Description
→ 60D	45D	2.00	15	
90D	70D	3.00	25	

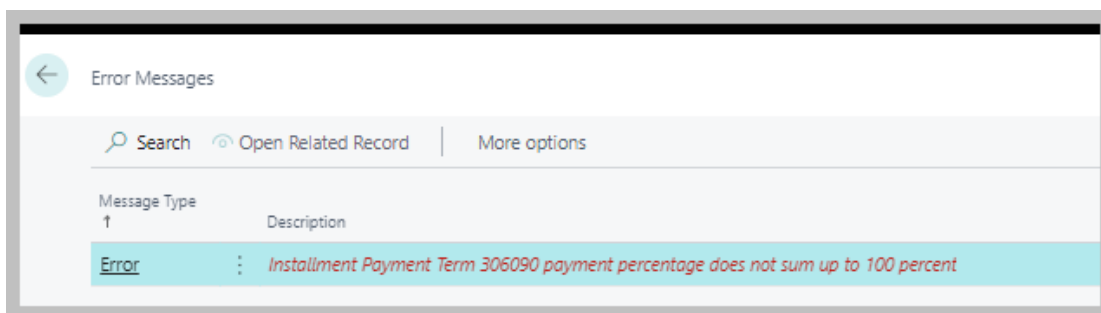
- 3) Add the new **Installment Payment Terms** to the Customer or Vendor Card in the **Payment Terms** field to default on documents.
- 4) Create a new Sales Order with the new Installment Payment Terms.
- 5) Post the Sales Invoice
- 6) Go to the **Customer Ledger Entries** page to view the entries created from the new **Installment Payment Terms**.

Posting Date	Due Date	Document Type	Document No.	Customer No.	Description	Original Amount	Amount	Sales (\$)
→ 6/27/2022	9/25/2022	Invoice	103041-3	20000	Installment Payment 3/3 for 103041	25.00	25.00	0.00
6/27/2022	8/26/2022	Invoice	103041-2	20000	Installment Payment 2/3 for 103041	15.00	15.00	0.00
6/27/2022	7/27/2022	Invoice	103041	20000	Installment Payment 1/3 for 103041	60.00	60.00	100.00

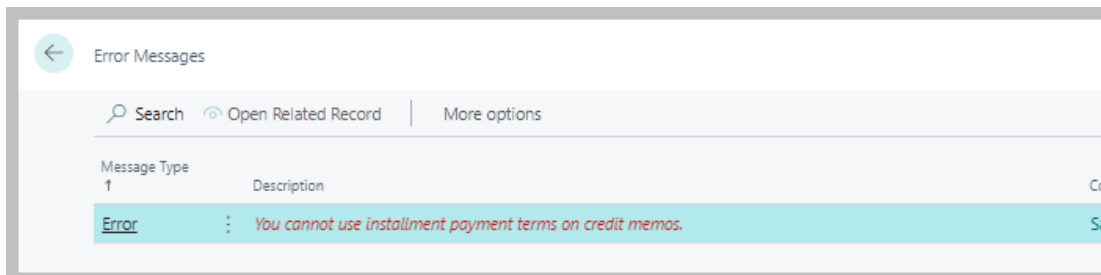
Once setup, the system will automatically split the payments, according to the records in the additional installment payment terms page.

## Limitations

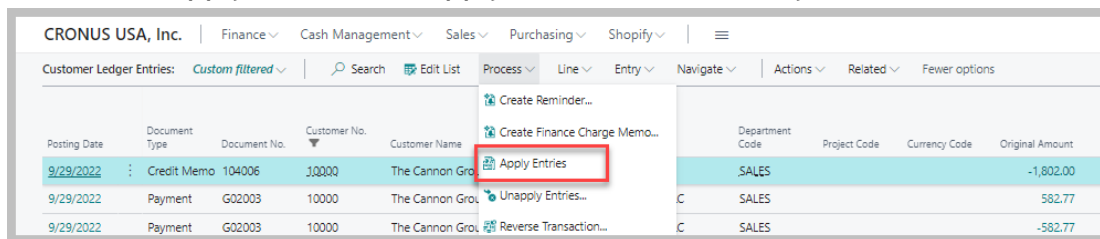
- 1) Installment Payment Terms need to sum up to 100 percent. If they do not, the system will display this error on Post Invoice.



- 2) Installment Payment Terms cannot be used on Credit Memos.



- To correct, Remove Installment Payment terms from the Credit Memo and Post the document.
- Go to the Customer/Vendor Ledger Entries page. Select the Posted Credit Memo. Select Process Apply Entries and apply the entries manually.



- 3) Due to localization limitations, US users will need to manually enter the IRS 1099 Amounts on purchase documents or create an extension to populate the 1099 fields after posting installment payment invoices.