Transportation Management System Capability Guide

for **Shippers**

Capability Guide. Shipper Scenario

if you are a Shipper company that manages the transportation process of its sales (and purchase) orders and uses either its own transport with its drivers or hires, as well as uses third-party carriers.

- ✓ Scheduling
- ✓ Order Grouping
- ✓ Routes and Zones
- ✓ Load Sequencing
- ✓ Routing
- ✓ Weight, Volume, Footage Control

- ✓ Route Optimization
- ✓ Loads Optimization
- ✓ Drivers
- ✓ Vehicles
- ✓ Carriers

Capability Guide

Transport Request

is a transportation request based on internal company documents, such as purchase orders, sales orders, or transfer orders. It defines **WHAT** needs to be transported, where the goods are to be picked up, and where they need to be delivered, while also specifying the shipper and the consignee.

Logistic Units

is an item of any composition intended for transportation. Logistic units take many forms: a single box containing a limited number of products, a pallet with multiple products, or an intermodal container containing multiple pallets.

Delivery Order

is a document that details **HOW** the transportation will be carried out. It specifies the carrier, driver, and vehicle. The Delivery Order represents the actual journey of the truck, outlining the stops where loading or unloading will take place.

What will be transported?

How will it be transported?

Capability Guide

The simplest way to send orders for transportation is by selecting one or more documents directly from the list of source documents and invoking the appropriate function: **Create Transport Request** or **Create Delivery Order**, depending on the objective.

Capability Guide

From any list of source documents, the **Transportation Status** and **Transportation Documents** fields allow you to determine whether the document has been sent to the TMS module for transportation, if a delivery order has been created, and whether this applies to the entire document or only certain lines.

No. ↑	Sell-to Customer No.	Sell-to Customer Name	Exte... Doc... No.	Location Code	Assign... User ID	Document Date	Status	Geographic Zone Code	Route No.	Transportation Status	Transportation Documents	Forward Order N
1001	49525252	Beef House		GREEN		1/22/2026	Open				–	–
1002	01905893	Candoxy Canada Inc.		YELLOW		1/22/2026	Released				–	OD.
1003	01905899	Elkhorn Airport		YELLOW		1/22/2026	Open				–	–
1004	01445544	Progressive Home Furnishings		YELLOW		1/22/2026	Released				–	–
1005	01445544	Progressive Home Furnishings		YELLOW		1/22/2026	Released			Partial Delivery	D0011	–
1006	01445544	Progressive Home Furnishings		YELLOW		1/22/2026	Released		I-95	Delivery	D0011	–
1007	27090917	Zanlan Corp.		YELLOW		1/22/2026	Released		I-95	Delivery	D0020	–
1008	27090917	Zanlan Corp.		YELLOW		1/22/2026	Released		N92	Delivery	D0020	–
1009	27090917	Zanlan Corp.		YELLOW		1/22/2026	Released		A8	Transport Request	TR148	–
101005	30000	John Haddock Insurance Co.				1/8/2026	Released				–	–
101009	38128456	MEMA Ljubljana d.o.o.		RED		1/16/2026	Released				–	–
101011	43687129	Designstudio Gmunden		RED		1/9/2026	Released				–	–
101013	46897889	Englunds Kontorsmöbler AB		YELLOW		1/15/2026	Released			Partial Delivery	D0021	–
101015	49633663	Autohaus Mielberg KG		GREEN		1/18/2026	Released			Partial Delivery	D0022	

Transport Request

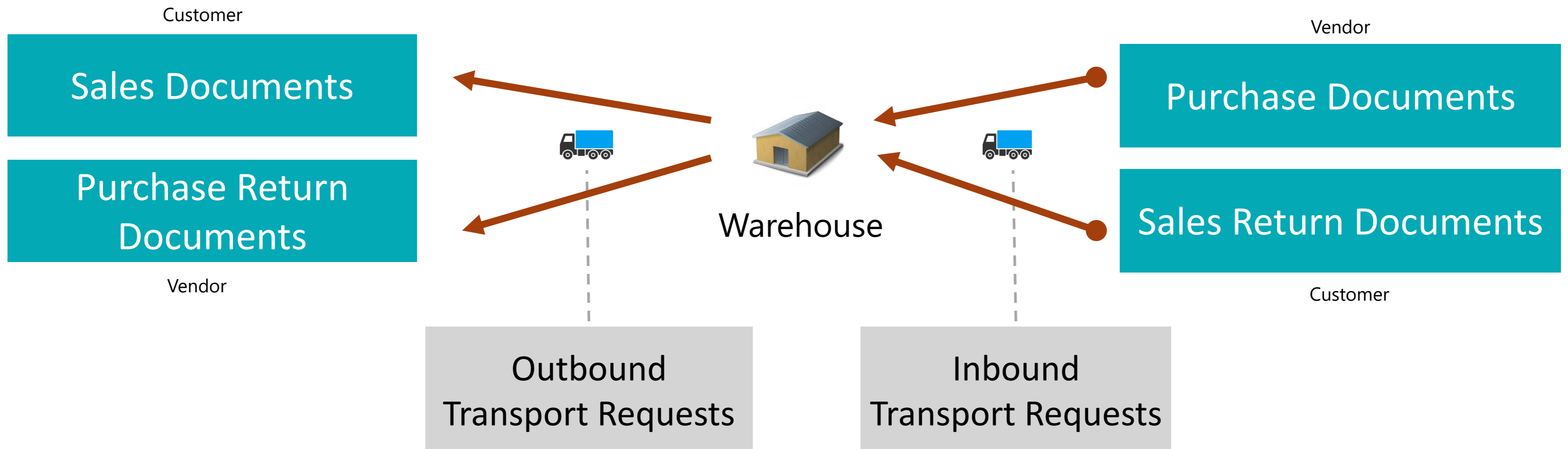# Capability Guide. Transport Request

The Transport Request document covers the following functional areas of the TMS.

- ✓ **Scheduling**
- ✓ **Order Grouping**
- ✓ **Routes and Zones**
- ✓ Load Sequencing
- ✓ Routing
- ✓ Weight, Volume, Footage Control

- ✓ Route Optimization
- ✓ Loads Optimization
- ✓ Drivers
- ✓ Vehicles
- ✓ Carriers

Capability Guide. Transport Request

To transport something from one place to another in the TMS module, you need to create a Transport Request. The request can be created for any document, whether it has been posted or not. A Transport Request serves as an assignment or instruction, indicating that these specific items need to be delivered from this location to that destination.

Customer

Sales Documents

Purchase Return Documents

Vendor

Vendor

Purchase Documents

Sales Return Documents

Customer

Warehouse

Outbound Transport Requests

Inbound Transport Requests

Capability Guide. Transport Request

Transport Request is a document used to initiate a request for organizing the transportation of goods from one point to another. It serves as a formal request for transportation services. This document can include line items from various source documents, but they are grouped based on the principle of moving from point **A to point B**. It does not include complex routes or multiple stops, focusing solely on straightforward point-to-point transport requests.

Warehouse   ➝   Customer
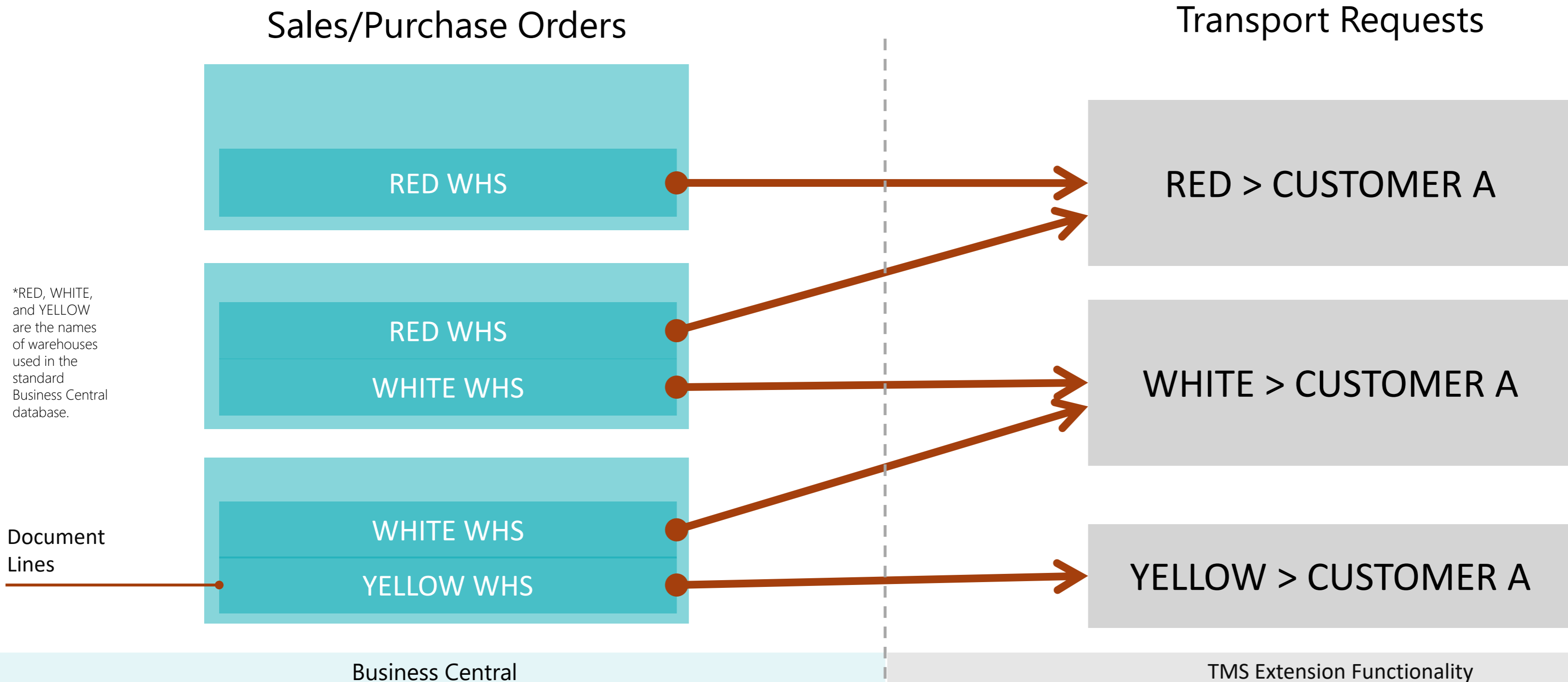
Vendor   ➝   Warehouse

Loading process   Unloading process
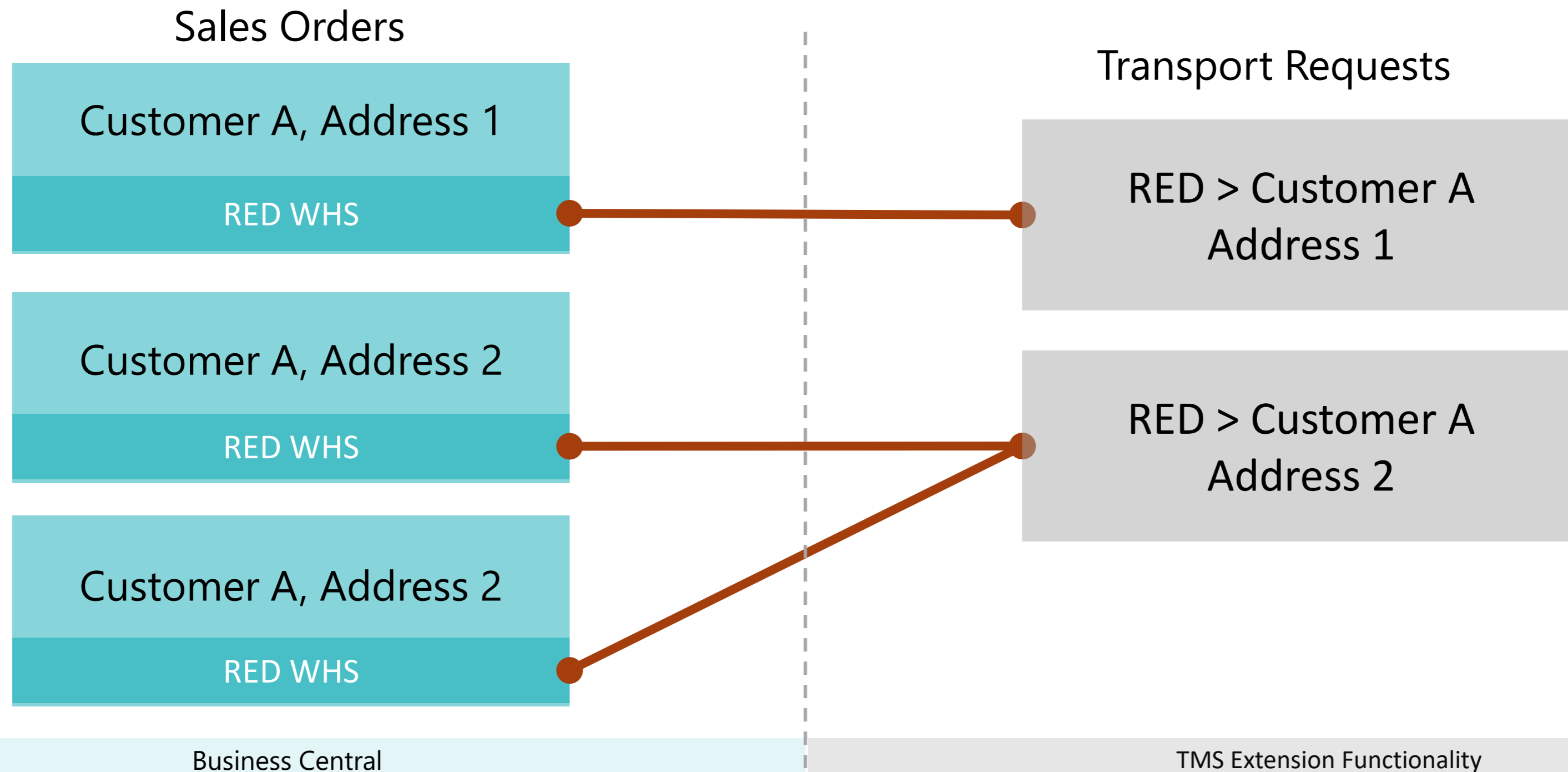
Capability Guide. Transport Request

The Transport Request allows grouping source documents based on the warehouse from which goods will be shipped or received. The connection is made at the line level, as in Business Central, different lines within the same document can be associated with different warehouses.

Sales/Purchase Orders

Transport Requests

RED WHS

RED WHS

WHITE WHS

WHITE WHS

YELLOW WHS

RED > CUSTOMER A

WHITE > CUSTOMER A

YELLOW > CUSTOMER A

*RED, WHITE, and YELLOW are the names of warehouses used in the standard Business Central database.

Document Lines

Business Central

TMS Extension Functionality

Capability Guide. Transport Request

The **Transport Request** allows grouping source documents based on the destination address where the delivery is to be made, within a scenario where goods are shipped from a single warehouse to a single customer, but with different delivery addresses for each order.

Sales Orders

Transport Requests

| Customer A, Address 1 |
| RED WHS |

RED > Customer A Address 1

| Customer A, Address 2 |
| RED WHS |

RED > Customer A Address 2

| Customer A, Address 2 |
| RED WHS |

Business Central

TMS Extension Functionality

Capability Guide. Transport Request

The key parameters of a Transport Request are the pickup and drop-off locations—where the goods are coming from and where they are going. The Shipper and Consignee can be our warehouse, a customer, or a vendor, offering flexibility to meet various transportation needs.

Load Point ──────────────────────► **Unload Point**

Transport Request | Work Date: 1/23/2026   ✓ Saved

TR149

Home   Get Source Documents   Delivery

⯆ Release | ∨   🌐 Show Route   ▦ Transport Time & Distance

General   Show more

Route No.		Transportation Distance (km)	0.00
Status	Released	Transportation Duration	

Shipper   **Consignee**

Shipper Type	Location	Consignee Type	Customer
Shipper Name	CRONUS UK, Ltd.	Consignee Name	Zanlan Corp.
Load Address Code	YELLOW	Unload Address Code	
Load Address	Main Bristol Street, 10	Unload Address	
Load Address, City	Bristol	Unload Address, City	

Capability Guide. Transport Request

The **Transport Request** leverages MAP Location data, matched with warehouses, suppliers, customers, or client and supplier addresses, to visualize the transportation route. This provides greater clarity and accuracy when planning the route.

Capability Guide. Transport Request

The Transport Request offers powerful tools for estimating both the duration and distance of the transportation, ensuring precise planning and efficient execution.

Load Point ——————————————————→ **Unload Point**

Transport Request | Work Date: 1/23/2026 ✓ Saved

TR149

Home   Get Source Documents   Delivery

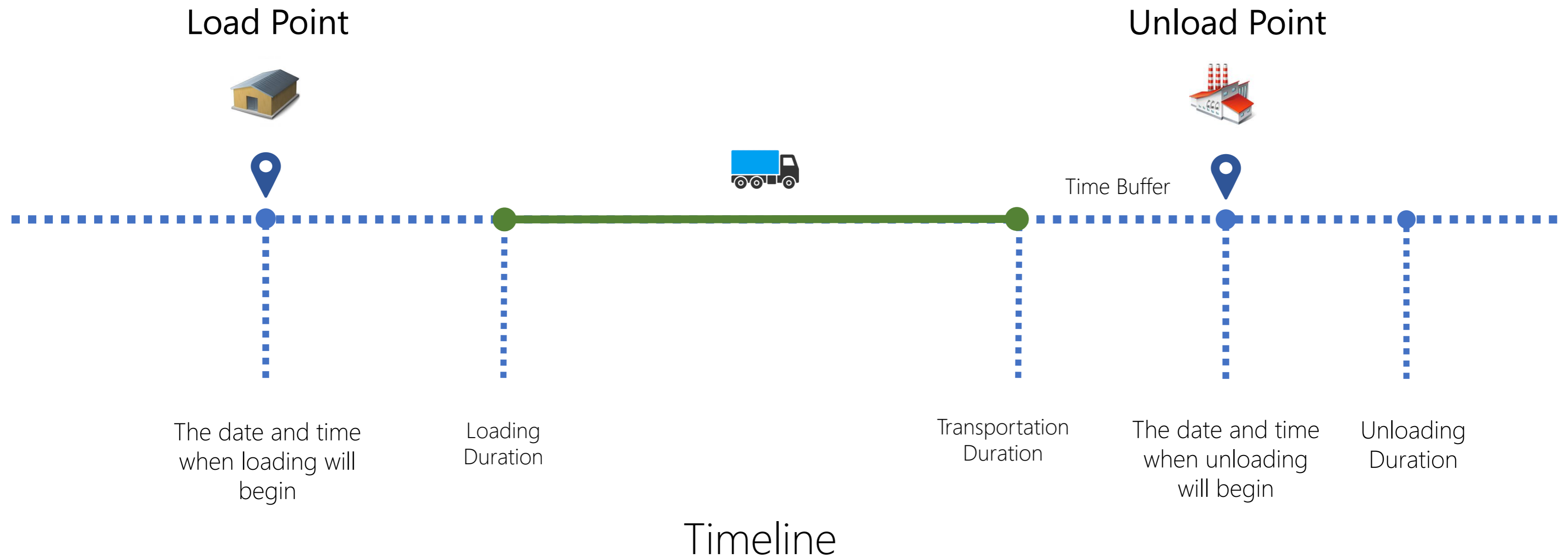🗎 Release | ⌄   🌐 Show Route   ▦ Transport Time & Distance

General

Show more

Route No.		Transportation Distance (km)	0.00
Status	Released	Transportation Duration	

Shipper

Shipper Type	Location	Consignee Type	Customer
Shipper Name	CRONUS UK, Ltd.	Consignee Name	Zanlan Corp.
Load Address Code	YELLOW	Unload Address Code	
Load Address	Main Bristol Street, 10	Unload Address	
Load Address, City	Bristol	Unload Address, City	

### Consignee

Capability Guide. Transport Request

The **Transport Request** allows you to precisely specify the required parameters: location, date, time, and most importantly, the duration of key transportation stages. The transportation duration can be estimated using the Google MAP API.

Load Point

Unload Point

Time Buffer

The date and time when loading will begin

Loading Duration

Transportation Duration

The date and time when unloading will begin

Unloading Duration

Timeline

Capability Guide. Transport Request

You can provide additional information about the loading and unloading locations that may be useful for the driver, such as the gate and the loading sequence.

Load Point

Unload Point

Timeline

Time Buffer
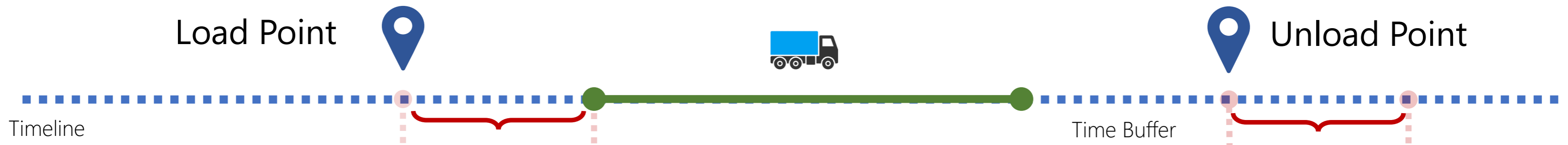
Transport Request | Work Date: 1/23/2026

✓ Saved

TR151

Home   Get Source Documents   Delivery

📄 Release | ⌄   🌐 Show Route   🖼 Transport Time & Distance

Planning

Show less

Load

Load Date And Time	10/18/2026 12:00 AM	📅
Load Duration	4 hours	
Load Priority	1
Loading Bay	GATE 5
Loading Comment	Check in at the front gate upon arrival. Wait for further instructions from the warehouse staff.

Unload

Unload Date And Time	10/19/2026 12:00 AM	📅
Unload Duration	7 hours	
Unload Priority	4
Unloading Bay	GATE A
Unloading Comment	Deliveries are accepted between 8:00 AM and 5:00 PM only. Enter through the west gate and report to reception

Capability Guide. Transport Request

The **Transport Request** includes line items from source documents and gives you the flexibility to adjust the quantities for the current transportation, allowing for multiple deliveries when needed by one source document. If the goods are packed into logistical units, that information is clearly displayed, ensuring seamless and organized transportation planning.

Source Document Lines.

Source Document Logistic Units.

Transport Request | Work Date: 1/23/2026

TR152

Home   Get Source Documents   Delivery

Release | ⌄   Show Route   Transport Time & Distance

Lines

Source Document		Source No.	Item No.	Description	Quantity	Unit of Measure Code	Qty. to Transport	Gross Weight per Unit of Measure	Gross Weight	Weight Unit of Measure	Length	Height
→ Sales Order	⋮	1015	1170	Tube	3	PCS	3.00	10	30	KG	0.00	0.00
Sales Order		1015	1255	Socket Back	2	PCS	2.00	5	10	KG	0.00	0.00

Total Gross Weight (base) · · · · · · · · · ·   40   Total Footage · · · · · · · · · · · · · ·

Total Volume (base) · · · · · · · · · · · · ·

Logistic Units

		Unit No.	Description	Quantity	Unit of Measure Code	Quantity (Base)	Weight (Base)	Source ID	Source Name
→	⌄	PLT0007	Pallet EU				40.00	_	
		_	Tube	3.00	PCS	3	30.00	1015	Sales Document
		_	Socket Back	2.00	PCS	2	10.00	1015	Sales Document

Delivery Order

Capability Guide. Delivery Order

The Delivery Order document covers the following functional areas of the TMS.

- Scheduling
- Order Grouping
- Routes and Zones
- **Load Sequencing**
- **Routing**
- **Weight, Volume, Footage Control**

- **Route Optimization**
- **Loads Optimization**
- Drivers
- Vehicles
- Carriers

Capability Guide. Delivery Order

A **Delivery Order** is:

- a real vehicle run,
- the actual driving route, detailing the order of stops the vehicle must make
- a set of tasks to be completed, such as loading, unloading, or pallet pickup,
- a loading sequence for the truck,
- a tool for control weight, volume, or footage limits at each stop along the route

Capability Guide. Delivery Order

Elements

Specifies **who** will be responsible for carrying out this transportation.

Vehicle restrictions based on weight, volume, or footage. Strict weight limit enforcement can be activated if needed.

Route Stops: The stop points along the route. Each Transport Request includes two stops.

The **date and time** when you are required to be at this location.

Delivery Order | Work Date: 1/23/2026   ✓ Saved

D0011

Home   Get Documents   Route   Optimization

📤 Release | ⌄   📋 Post Delivery   📇 Refresh Lines

General   Show more

Route No.	N92		Limitations		
Carrier Name	M9 Logistics	...	Type	C20DC	⌄
Vehicle Name	Volvo Truck 433	...	Description	20' Dry freight container	
Driver Name	Ed Korso	...	Vehicle Max Payload Weight	28,000.00	
Status	In Progress		Vehicle Internal Volume	33.13	

Manifest   ⊞ New Line   ⊟ Delete Line   🌐 Show on Map

Sequence	Waypoint No.	Waypoint Description	Scheduled Date and Time	Han... Time	Action Code	Description	Transportation Duration	Time Buffer	W
10	M0000002	White Warehouse	1/22/2026 12:00 AM		LOAD	Load 2 lines.			
20	M0000014	Yellow Warehouse	1/22/2026 12:00 AM		LOAD	Load 5 lines.		2	
30	M0000016	Progressive Home Furnishings	1/22/2026 11:59 PM		UNLOAD	Unload 2 lines.	23 hours 5...		
→ 40	M0000016	Progressive Home Furnishings	1/22/2026 11:59 PM		UNLOAD	Unload 5 lines.	23 hours 5...	-2	

Capability Guide. Delivery Order

Delivery Order consolidates multiple transport requests into a single document, creating a vehicle route that accounts for weight and volume constraints, while optimizing the route based on distance or duration.

Transport Requests

Customer D

Customer A

Customer B

Customer C

Vendor X

Delivery Order

Customer C

Customer B

Customer A

Vendor X

Warehouse

● Load

← Unload
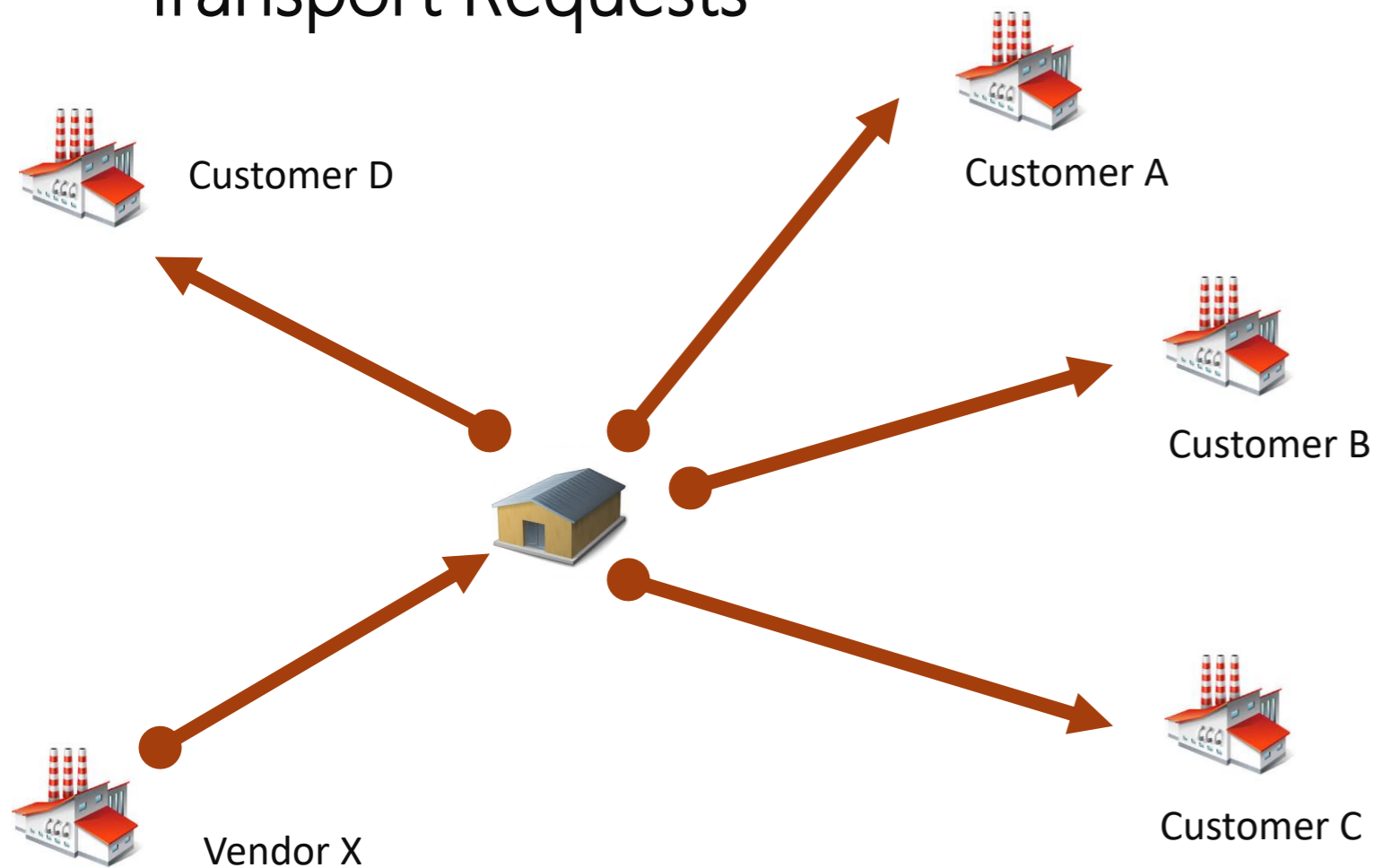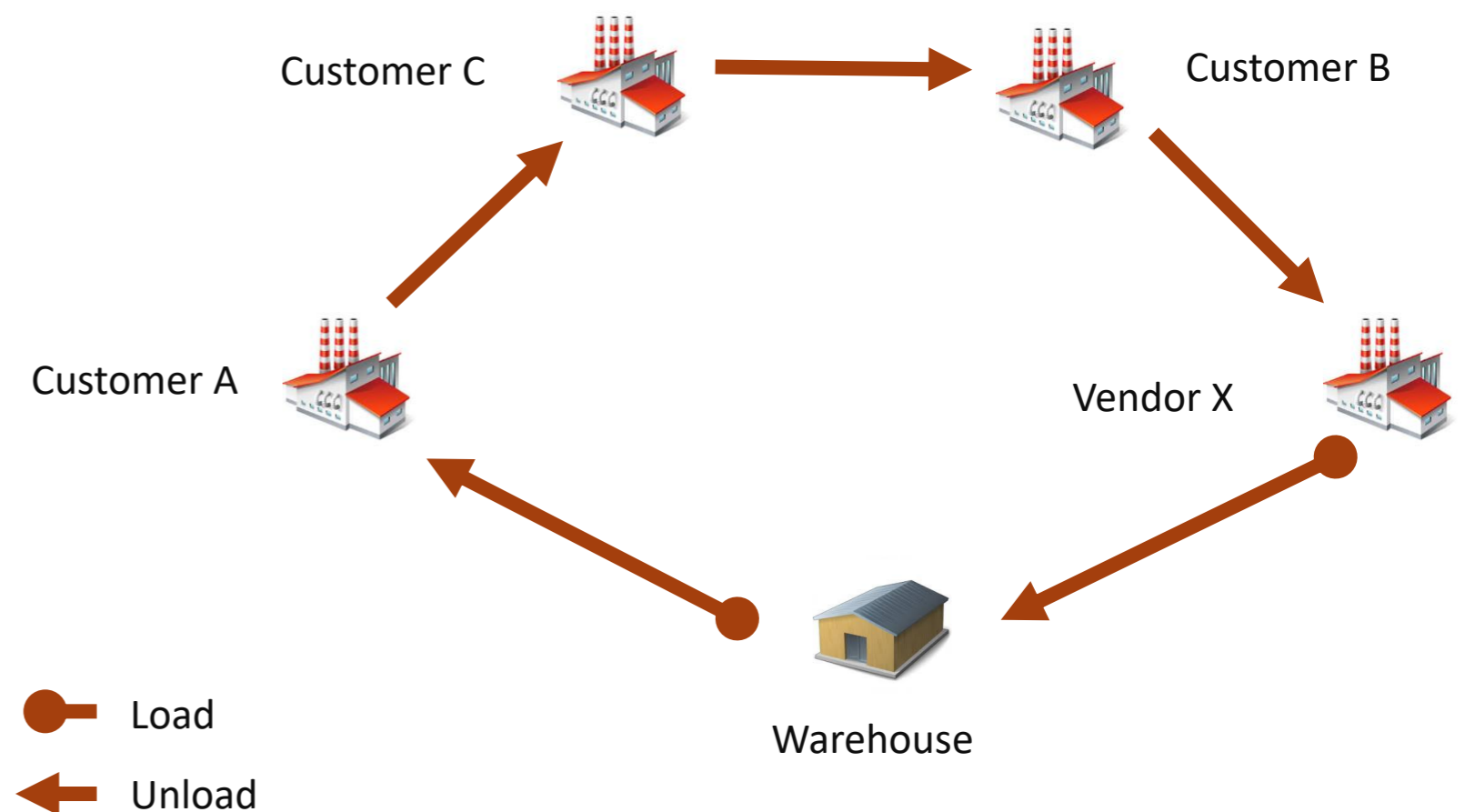
Capability Guide. Delivery Order

Delivery Order allows for the automatic determination of the vehicle loading sequence at the warehouse, based on the order of the delivery stops along the route.

Delivery Order

C

B

A

Vendor X

Warehouse

● ← Load

← Unload

Load Sequence

Customer
A

Customer
C

Customer
B
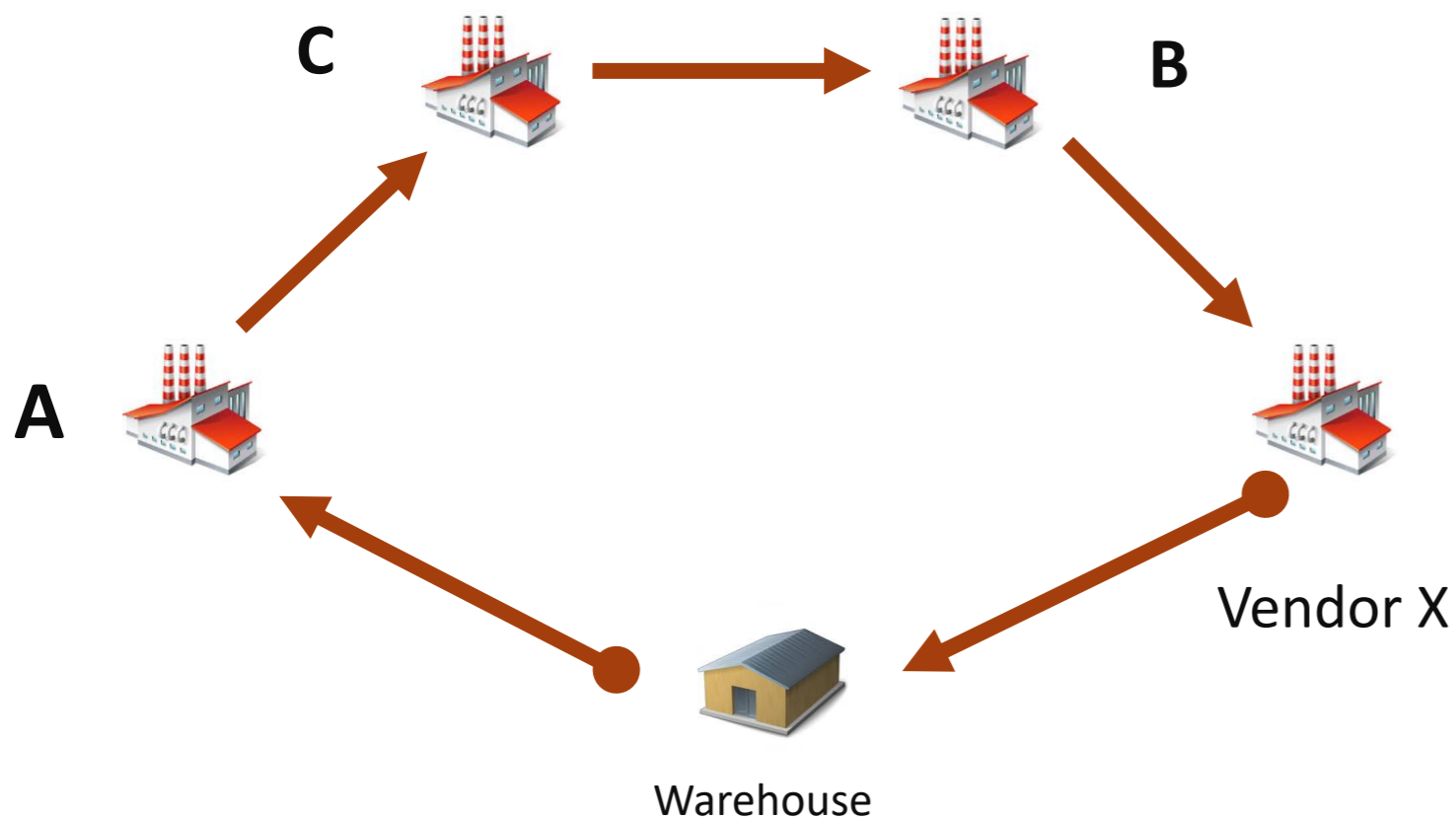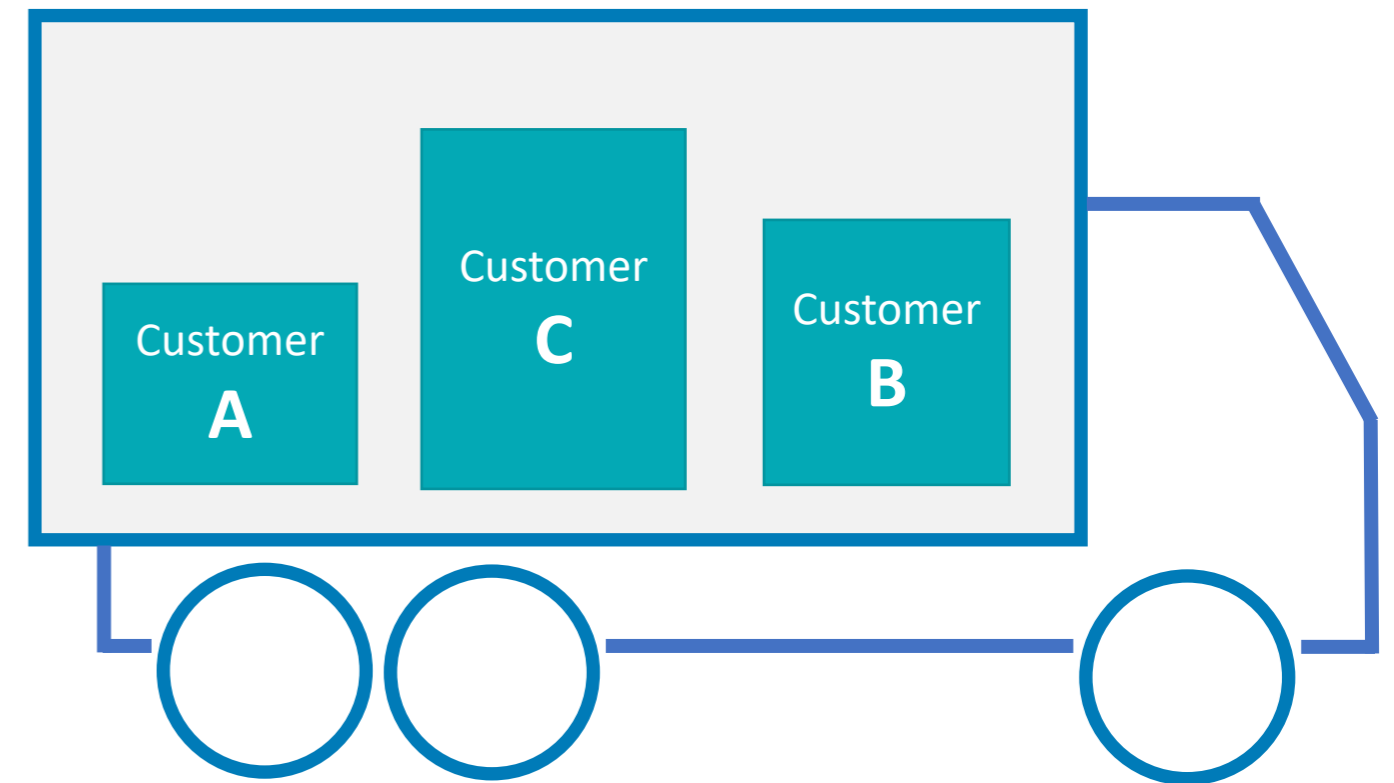
Capability Guide. Delivery Order

The Delivery Order allows you to manually set the vehicle loading sequence or the order of stops along the route by adjusting the **Sequence** field.

A field that defines the loading order or the sequence of stops along the route.

Capability Guide. Delivery Order

Delivery Order can control for additional route elements, such as the trip to the warehouse or the return journey (distance and duration), which are critical for managing driver work hours or fleet operations for companies with their own vehicle fleets

Warehouse   Customer A   Customer B   Customer C

The **route** from the truck parking area to the loading warehouse.

20 km 2h

The **deadhead return trip** from the final delivery point back to the truck parking area.

40 km 3h

Truck Yard

● ——► Load   ◄— Unload   ▪▪▪▪ Deadhead
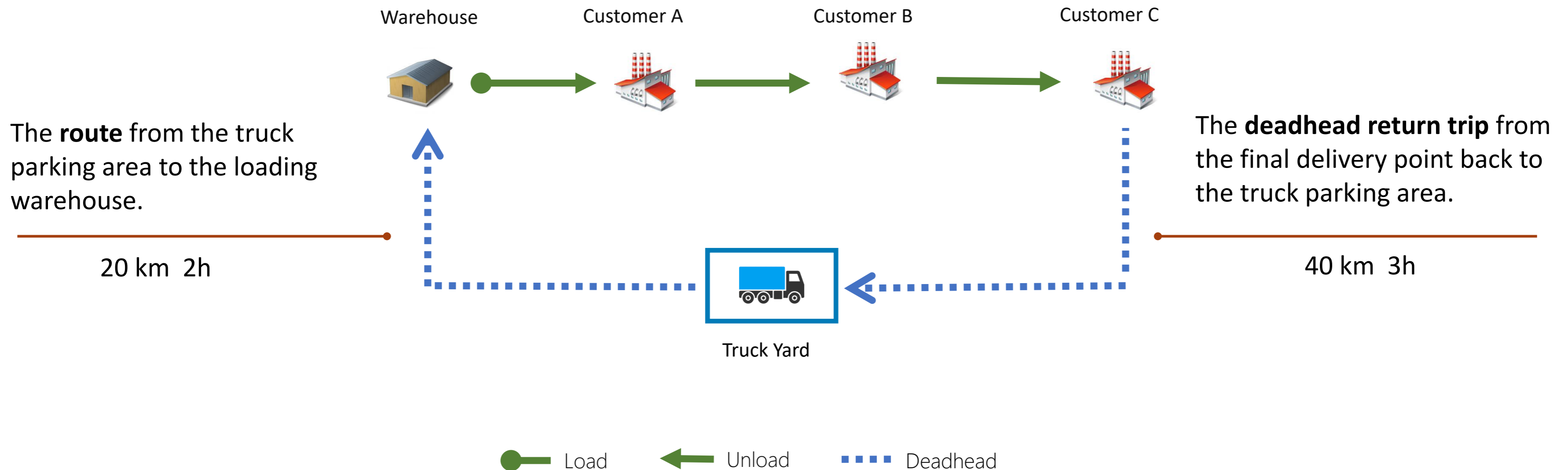
Capability Guide. Delivery Order

Delivery Order enables the selection of Transport Requests based on route numbers. Each customer can be assigned a route number that corresponds to their delivery address.

Transport Requests

Route I-95
Customer A

Route I-76
Customer D

Route I-35
Customer E

Route I-95
Customer B

Route I-27
Customer F

Route I-95
Customer C

Delivery Order

Route I-95

Customer A   Customer B   Customer C

Warehouse   Truck Yard

●— Load   ◄— Unload   ····· Deadhead
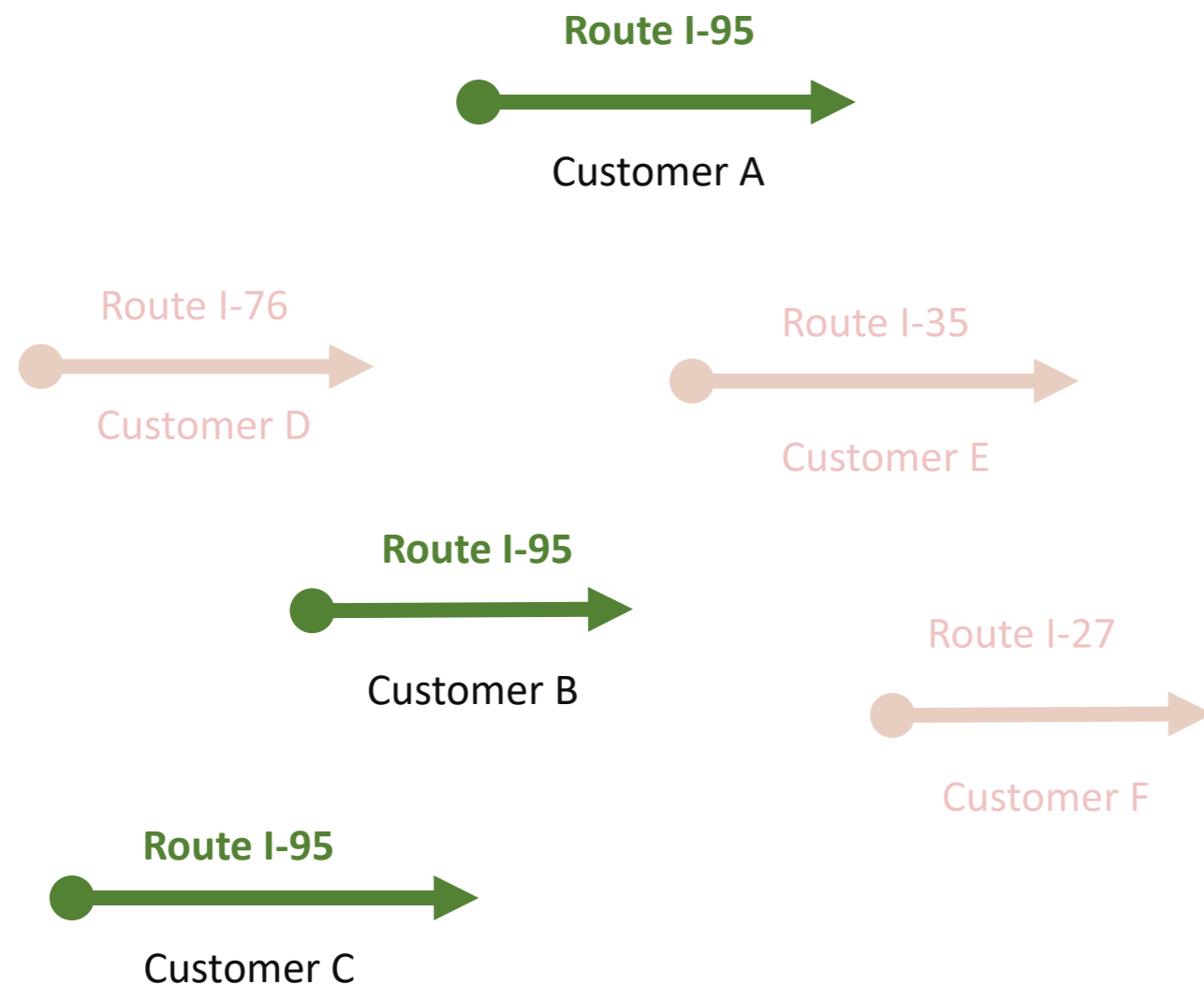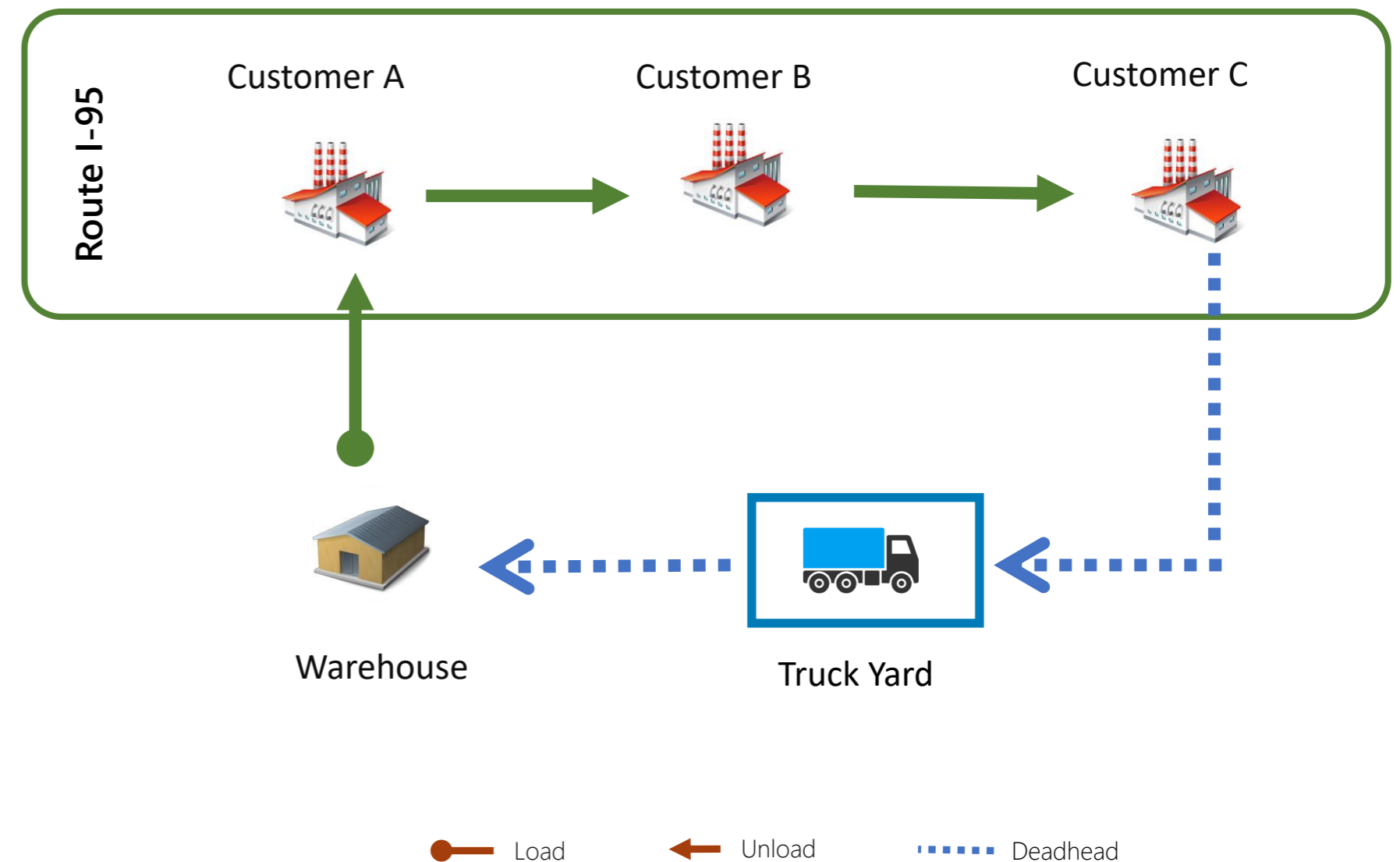
Capability Guide. Delivery Order

Integration with Google Maps for constructing the optimal delivery route between MAP locations with the capability for optimization based on distance or duration criteria.
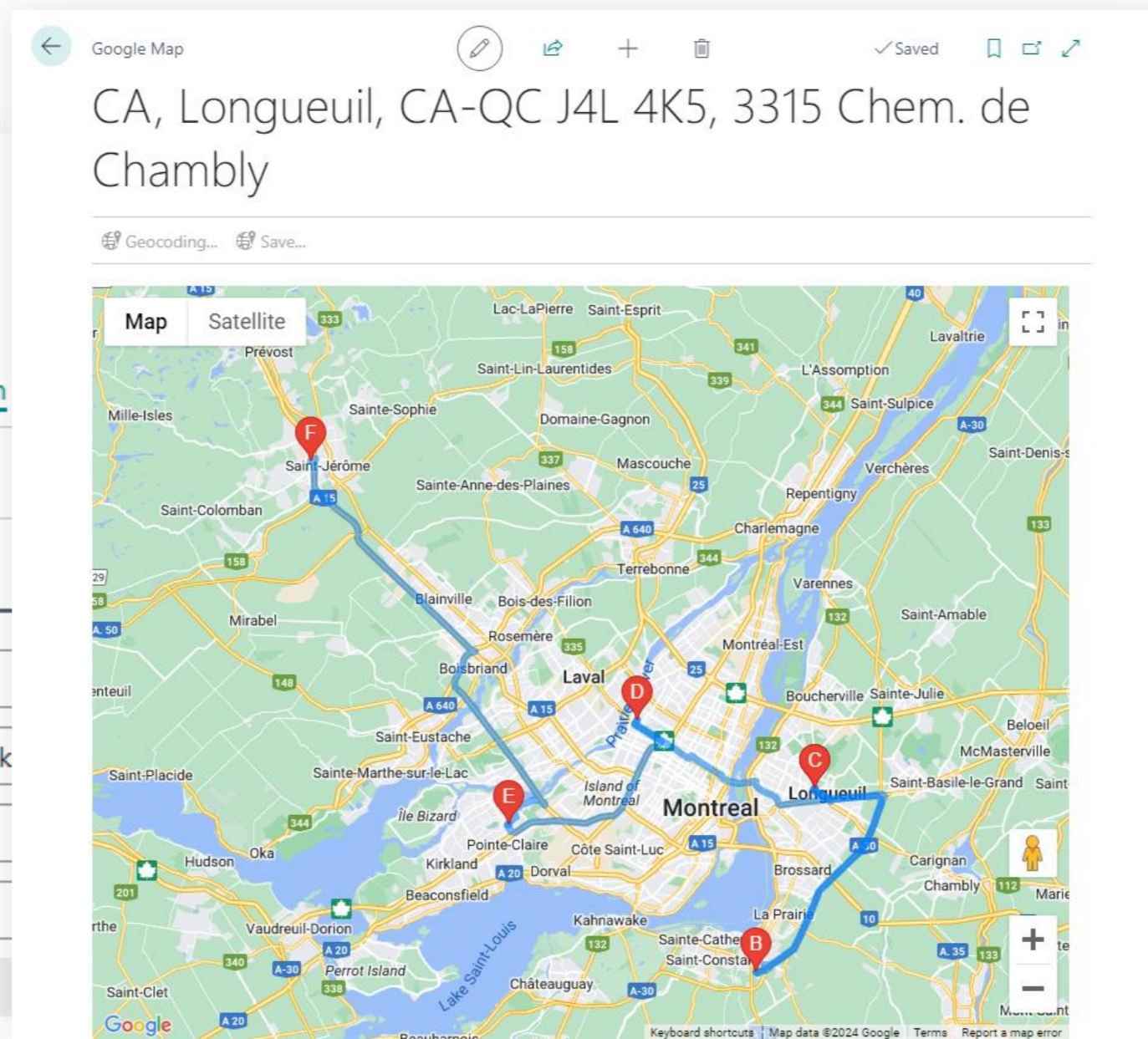
Capability Guide. Delivery Order

Automatically checks the loading and unloading schedule for the entire route, accounting for transportation time, and indicates if it's not possible to arrive at a specific location at the required time.

Load
10/18/2026 10:00 AM

Unload
10/18/20 10:00 PM

Short by 2 hours to arrive at the unloading location on time

Timeline

2h Loading

10h Transportation
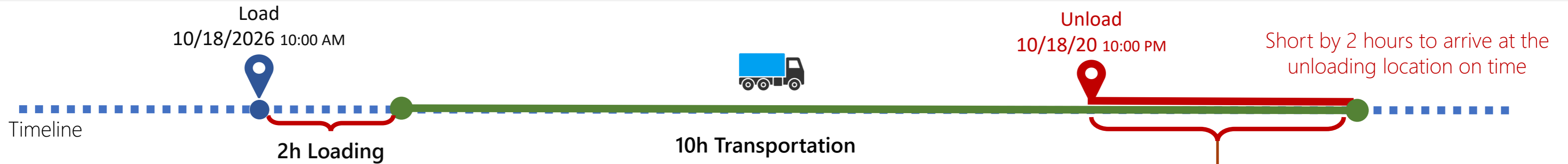
Unable to meet the scheduled unloading time.

Delivery Order | Work Date: 1/23/2026

✓ Saved

D0020

Home   Get Documents   **Route**   Optimization

🔲 Show Route   🔲 Get Transport Time & Distance

Manifest   🔲 New Line   🔲 Delete Line   🔲 Show on Map

Sequence	Waypoint No.	Waypoint Description	Scheduled Date and Time	Han... Time	Action Code	Description	Transportation Duration	Time Buffer	Weight
10	M0000012	Green Warehouse	10/18/2026 10:00 AM	1 hour	LOAD	Load 10 lines.			683,049.19
20	M0000012	Green Warehouse	10/18/2026 1:30 PM	1 hour	LOAD	Load 6 lines.		30 minutes	415,952.29
30	M0000074	Beef House	10/18/2026 10:00 PM	2 ho...	UNLOAD	Unload 6 lines.	10 hours 27 m...	-2 hours -...	-415,952.29
40	M0000075	Autohaus Mielberg KG	10/18/2026 11:00 PM	2 ho...	UNLOAD	Unload 10 lines.	4 hours 27 mi...	-5 hours -...	-683,049.19

Transportation Management System

Scheduler

Capability Guide. Scheduler

The Visual Scheduler helps allocate requests and orders among available resources, including carriers, vehicles, and drivers.

Planning Period
Control

The **list of resources**
used for order
allocation
Carrier | Vehicle |
Driver

Transport Request list

Scheduler | Work Date: 1/23/2026

January 01/01/26 - 01/31/26 | Planning by vehicle

◄ Previous   ▦ Select Period   ▶ Next   ⚙ Settings   ↻ Update   Resources

▣ Carriers   ▣ Vehicle   ▣ Drivers   ▣ Time Slots

	January			
	Week 01, January	Week 02, January	Week 03, January	Week 04, January

Undefined

TRK 34 - Volvo FH 987

TRK 66 - Volvo FM

TRK 04 - SCANIA R590

TRK 05 - Volvo FL

Volvo Truck 433

TRK 75 - SCANIA R590

TRK 72 - SCANIA R590

Transport Requests

Delivery Order
assigned to
Volvo 433 truck

Transport request
on a specific day

Capability Guide. Scheduler

Planning can be done across various time periods, such as weekly, quarterly, or monthly, and can be applied across different types of resources.

Carriers
Vehicles
Drivers

Capability Guide. Carriers

The system allows for managing carriers involved in order planning. Vehicles and drivers are assigned to specific carriers.

Capability Guide. Vehicles

The system enables tracking of both company-owned and hired vehicles, as well as recording the mileage of each vehicle based on completed orders.

Capability Guide. Vehicles

For each vehicle, you can specify its weight and dimensional parameters used for load planning, such as maximum allowable weight, volume, or footage.

Capability Guide. Vehicles

A vehicle can be linked to the fixed assets registry if it qualifies as one, allowing you to track expenses associated with the vehicle, such as repairs or fuel. To do this, you need to set up a separate depreciation book for each type of expense and post purchase invoices by the specific fixed asset.

Capability Guide. Drivers

If the company tracks drivers' working hours and the orders they complete, a profile must be created for each driver.

The field indicates which carrier the driver belongs to.

The default vehicle that will be selected when this driver is chosen in the delivery order.

Thank you

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