

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.





- <u>Charge Management</u>
- Scheduler
- Drivers
- Vehicles
- Carriers

Capability Guide

Documents

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.

What will be transported?



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.

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.

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			Sell-to	1	External		Assigned	р Create Transpor	t Reque
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0	101009		38128456	MEMA Ljubljana d.o.o.		RED		1/16/2026	Rele
0	<u>101011</u>		43687129	Designstudio Gmunden		RED		1/9/2026	Rele
0	101013		46897889	Englunds Kontorsmöbler AB		YELLOW		1/15/2026	Rele
0	101015		49633663	Autohaus Mielberg KG		GREEN		1/18/2026	Rele
0	101016		10000	The Cannon Group PLC		BLUE		1/22/2026	Rele
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0	101020		32789456	Lovaina Contractors		YELLOW		1/23/2026	Оре
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0	1011		01121212	Spotsmeyer's Furnishings		YELLOW		1/22/2026	Rele



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	Geographic Zone Code	Route No.	Transportation Status	Transportation Documents	Foi On
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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.

ales Orders: All ~	, _, , С. 🗒	+ New 🗓 Delete Home	e 🗸 🖸	Release 🗸 🗸	🛅 Post 🖄	 Print/Se 	nd \sim Orde	er \vee TMS \vee	Actions \vee	···· 🖻	7 ≣ 0	2 🏿
○ 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	Forwar Order I
0 1001	49525252	Beef House		GREEN		1/22/2026	Open				_	-
0 1002	01905893	Candoxy Canada Inc.		YELLOW		1/22/2026	Released				_	OD.
0 1003	01905899	Elkhorn Airport		YELLOW		1/22/2026	Open				_	-
0 1004	01445544	Progressive Home Furnishings		YELLOW		1/22/2026	Released				_	-
0 1005	01445544	Progressive Home Furnishings		YELLOW		1/22/2026	Released			Partial Delivery	D0011	-
<u>1006</u>	01445544	Progressive Home Furnishings		YELLOW		1/22/2026	Released		J <u>-95</u>	Delivery	D0011	-
1007	27090917	Zanlan Corp.		YELLOW		1/22/2026	Released		J <u>-95</u>	Delivery	D0020	-
1008	27090917	Zanlan Corp.		YELLOW		1/22/2026	Released		<u>N92</u>	Delivery	D0020	-
0 1009	27090917	Zanlan Corp.		YELLOW		1/22/2026	Released		A8	Transport Reques	t TR148	-
0 101005	30000	John Haddock Insurance Co.				1/8/2026	Released				_	-
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0 101015	49633663	Autohaus Mielberg KG		GREEN		1/18/2026	Released			Partial Delivery	D0022	_



Transportation Management System

Transport Request

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





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.





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.



Loading process

Unloading process



Customer

Warehouse

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.





Transport Requests

RED > CUSTOMER A

WHITE > CUSTOMER A

YELLOW > CUSTOMER A

TMS Extension Functionality

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.





Transport Requests

RED > Customer A Address 1

RED > Customer A Address 2

TMS Extension Functionality

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 Doint	
(Transport Request Work Date: 1/23/2026	+ 🖻
	TR149	
	Home Get Source Documents Delivery	
	🕃 Release 🗸 🛛 🤀 Show Route 🔠 Transport Time & Distance	
	General	
	Route No.	Transportation Distance (km)
	Status · · · · · · · · · · · · · · · · · · ·	Transportation Duration
	Shipper	Consignee
	Shipper Type · · · · · Location · ·	Consignee Type
	Shipper Name · · · · · · · · · · · · CRONUS UK, Ltd.	Consignee Name
	Load Address Code · · · · · · · · · · · · · · · · · · ·	Unload Address Code
	Load Address · · · · · · · · · · · · · · · · · ·	Unload Address · · · · · · · · · · · · · · · · · ·
	Load Address, City Bristol	Unload Address, City





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.

	GR Livernool 118 6	SSA Main Livernool Street 5	
	OD, Liverpool, Lio C	JSA, Main Liverpool Street, J	
Transport Request Work Date: 1/23/202	😭 Find Address On Map 🛛 🔒 Save		Saved 5
	Eainburgh		
TR151	Map Satellite		
Home Get Source Documents De	United		
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Snow Route	Isle of Man	Rostock	×
General	la Anat Britain	Hangurg	Show more
	Liverpool Sheffield	Groningen Bremen	400.00
Route No.	Birmingham	th Hanavar	100.00
Status	Cambridge	Bielefeld Magdeburg	
Shipper	WALES Oxford Oxford	o Netherlands Ortmund	
Shipper Type	Cardiff	Antwerp ODüsseldorf Germany	~
Shipper Name	Exeter Bournemouth	Lilleo Bolarium Liège	ielberg KG
Load Address Code	english Channel	Frankfurt	~
Load Address	Rouen	Luxembourg Mannheim Nuremberg	
	Jersey Caen		



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

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2026 Delivery	Ø B	+ 🖻
🔡 Transport Time & Distance		
L		
	~	Transportation Distance (km)
Released		Transportation Duration
		Consignee
Location	\sim	Consignee Type
CRONUS UK, Ltd.		Consignee Name
YELLOW	\sim	Unload Address Code
Main Bristol Street, 10		Unload Address
Bristol		Unload Address, City
	2026 Delivery Image: Transport Time & Distance Released Released CRONUS UK, Ltd. VELLOW Main Bristol Street, 10 Bristol	2026 2026 Delivery Transport Time & Distance Image: CRONUS UK, Ltd. CRONUS UK, Ltd. VELLOW Main Bristol Street, 10 Bristol





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.





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	9	0010
Timeline		
← Transport Request Work Date: 1/23/2026 TR151 Home Get Source Documents Delivery Release ∨ Show Route Trans 	sport Time & Distance	i
Load Date And Time	10/18/2026 12:00 AM	Unload
Load Duration	4 hours	Unload Duration
Load Priority	1	Unload Priority
Loading Bay	GATE 5 Check in at the front gate upon arrival. Wait for further instructions from the warehouse staff.	Unloading Bay





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.

	¢	Transport Request W TR152 <u>Home</u> Get Source	ork Date: 1/23/2 Documents	2026 Delivery	Time & Distance	Ø) 🖻 -	+ 🖻					√ Saved	□ ,× ,<		
Source		Lines	, Show House										Ŕ	62		
Document 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			
	-	→ <u>Sales Order</u> :	1015	<u>1170</u>	Tube	3	PCS	3.00	10	30	KG	0.00	0.00			
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		Unit No.		Description		Quantity	Code	Quantity (B	ase) W	/eight (Base) S	ource ID	Source Name		-		
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		_		Socket Back		2.00	PCS		2	10.00 1	015	Sales Document	t			



Transportation Management System

Delivery Order

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



- Routes and Zones
- Load Management
- **Route Management**
- Weight, Volume, Footage Control \checkmark
- Load Sequencing & Optimization \checkmark



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



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Elements

~	Delivery Order Work	c Date: 1/23/2026		Ø E	+	- 🔟	
	Home Get Docu	ments Route	Optimization				
	Release 🗸	🖞 Post Delivery	🔓 Refresh Lines				
Specifies who will be	General						
responsible for	Route No.		N92	\sim	Limit	ations	
transportation.	Carrier Name		M9 Logistics		Туре		
	Vehicle Name		Volvo Truck 433		Descr	iption	
	Driver Name		Ed Korso		Vehic	le Max Payload	Weight
	Status		In Progress		Vehic	le Internal Volu	ıme · · · · · · · · · · · ·
Route Stops : The stop points along	Manifest 📑	* New Line 🛛 🖹 🗎	Delete Line 🛛 🤀 Show on Map				
the route. Each	Sequence	Waypoint No.	Waypoint Description	Scheduled Date and Time	Han Time	Action Code	Description
includes two stops	10	M000002	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.
	30	M0000016	Progressive Home Furnishings	1/22/2026 11:59 PM		UNLOAD	Unload 2 lines.

Progressive Home Furnishings

1/22/2026 11:59 PM

UNLOAD

Unload 5 lines.





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.





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.





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	~	Deliv D(Hc	very Order W)))20 ome Get Do Show Route	ork [cum	Date: 1/23/2026 ents <u>Route</u>	Optimization Time & Distance	A state	+	١. I		
the sequence of stops along the route.			Sequence		Waypoint No.	Waypoint Description	Scheduled Date and Time	Han Time	Action Code	Description	Trai Dui
			20	:	M0000012	Green Warehouse	10/18/2026 1:30 PM	1 hour		Load 6 lines	
		Ĥ	20	:	M0000074	Beef Heure	10/10/2020 1.30 PM	2.64		Load o mies.	10
			30		10000074	Beet House	10/18/2026 10:00 PM	2 no	UNLOAD	Unioad 6 lines.	10
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		Tot	als								
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hours 27 mi	-5 hours	-683,049.19	

20 hours 54 minutes

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





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.





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

Delivery Order Work Date: 1/23/2026	 Google Map CA, Longueuil, CA-QC J4L 4K5, 3315 Chem. de Chambly 	√ Saved ⊑' ₂ ^K
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Home Get Documents Route Optimization Route Optimization General	Mille-Isles Sainte-Sophie Domaine-Gagnon Saint-Sulpice Saint-Sulpice Saint-Jerôme Sainte-Anne-des-Plaines 25 Repentigny 13 Saint-Colomban A3 Charlemagne 13 Saint-Colomban A3 Charlemagne 13 Saint-Colomban A3 Charlemagne 13	Show more
Route No. Oleg Lobak	3 Mirabel Bainville Bois-des-Filion 132 Saint-Amable 4 Rosemère 35 Montréal-Est Montréal-Est 5 Boisbriand Laval 5 Boucherville Sainte-Julie 5 Saint-Eustache 5 132 Beloeil	20FRC V
Vehicle Name · · · · · · · · · · · · · · · Trrr3	Saint-Placide Sainte-Martne-sur-le-Lac Island of Montreal Montreal Longueuit Saint-Basile-le-Grand Saint- Hudson Oka Pointe-Claire Côte Saint-Luc A15 Hudson Oka Kirkland 20 Dorval Brossard Carignan Chambly 112	0' Flat Rack container
Status	rthe Vaudreuil-Dorion Kahnawake La Prairi 10 340 A 30 Perrot Island Châteauguay La 10 Saint-Constan A 30 Châteauguay La 10	33.12



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.





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es.	4 hours 27 mi	-5 hours	-683,049.19					

Transportation Management System

Charge Management

Capability Guide. Charge Management

TMS helps allocate transportation charges related to orders in the most cost-effective way, automating and simplifying this process. This is based on the standard Item Charges mechanism in Business Central.



The **Delivery Order** contains all necessary information for allocating costs across orders in one place and enables accurate calculation of delivery costs for the customer.



Customer C



Capability Guide. Charge Management

TMS offers two levels of charge allocation: the first between transported orders, and the second across item lines within the orders.









Distribution by:

- Distance
- Weight
- Volume
- Footage
- No. of Logistic Units
- Equally
- Your own

Distribution by:

- Equally
- Amount
- Weight
- Volume

Capability Guide. Charge Management

How it works

The following system documents are used for controlling and accounting for charges allocation: **Purchase Invoice** for entering the carrier's invoice, **Sales Invoice** for invoicing the customer for delivery, **Delivery Order** as a tool for allocating and controlling costs across orders included in the shipment, and Item Charges as an accounting object for all documents.

Delivery Order DLV028		(Ø	ළ +		۱ ۱	← Purch	^{hase Invoice} 7223 · Subcon ⁻	tractor				?) 🖻	+	Î
Home Get Documents Route Optimization Print N	/lore option	s					Ho	<u>me</u> Prepare Request Aj	pproval Invoice	tms i	More options	5			
🖸 Release 🗸 📫 Post 🛛 🚟 Refresh Lines							51	Post 🗸 🖪 Release 🗸							
General	Item	Charges						~	∕Saved □	c 2					
Route No. EAST	Q	×	+ N6	ew 📑 Ec	lit List	前 Delete	Item Charge	More options	Ŀ	7 ≣				VAT Date -	
Carrier Name Subcontractor							Gen. Prod. Po	sting VAT Prod. Posting	Search					Due Date	
Vehicle Name		No. 1	Des	cription			Group	Group	Description	Freigh	_			Vendor Inv	pice No.
Driver Name	\rightarrow	JB-FREIGHT	: Fre	ight Charg	e (JB-S	Spedition)	SERVICES	STANDARD	FREIGHT CHA					Status	
Status		P-ALLOWANCE	Pu	rchase Allo	wance		SERVICES	STANDARD	PURCHASE A						
Open		P-FREIGHT	Mi	sc. Freight (Charge	e (Purch.)	SERVICES	STANDARD	MISC. FREIGH						
		P-RESTOCK	Pu	rchase Rest	ock Ch	harge	SERVICES	STANDARD	PURCHASE RE	. 🗆					
Route Stops and Actions 🛛 🧚 New Line 🛛 🐼 Delete Li		S-ALLOWANCE	Sal	es Allowan	ce		SERVICES	STANDARD	SALES ALLOW	. 🗆		× Delete Line			



In Business Central, a freight services invoice from the carrier that actually performed the transportation is entered as a standard Purchase Invoice document. The line type must be specified as Item Charge.

					\sim									
	Purchase Invoice				Ø) 🖻	? +	۱ ۱					√Saved ⊑	× ²
	107223 · Subco	ntractor												
	Home Prepare Request	t Approval Invo	pice TMS More options											0
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	General												Show more	A TP
													Show more	
	Vendor Name		Subcontractor				VAT Date			4/8/2024				
	Contact · · · · · · · · · · · · · · · · · · ·						Due Date			4/8/2024				
	Document Date		4/8/2024				Vendor Ir	voice No.		A454-987				
	Posting Date		4/8/2024			Ē	Status			Open				
														A field indicating that
	Lines <u>Manage</u> TMS	Line											6 6	this transportation
	🗿 Select items 🖩 Billin	ing Lines 🛛 / 🖉 U	sage Data 🗦 Pew Line 😽	Delete Line									Ś	charge is allocated to
	Туре	No.	Description/Comment	Location Code	Qua	l ntity N	Jnit of Measure Code	Direct Unit Cost Excl. VAT	Line Amount Excl. VAT	Qty. to Assign	Qty. Assigned	Department Code	Customergroup Code	transported orders.
Don't forget to	ightarrow Charge (Item)	JB-FREIGH 🗸	Freight Charge (JB-Spedition)			1		200.00	200.00	0	-			
add your charges		No. †	Description	Gen. Prod. Posting Group	VAT Prod. Posting Group									
to this directory.		→ JB-FREIGHT	Freight Charge (JB-Spedition)	SERVICES	STANDARD	•								
	•	P-ALLOWA.	Purchase Allowance	SERVICES	STANDARD									
	Subtotal Excl. VAT (GBP)	P-FREIGHT	Misc. Freight Charge (Purch.)	SERVICES	STANDARD	.00	Total Excl	. VAT (GBP)					200.00	D



Associates the carrier's invoice with our delivery order. In the Charges section of the Delivery Order, select the line or lines from the created invoice to allocate charges to the selected delivery.

	Celivery Order		+ 🖻	√Saved 🗍 🖬 📌	
	Home Get Documents Route Optimization	Print More options Purchase Item Charge Selection $P \sim$	∠ ×	\$	Purchase invoice lines with item
	Route Stops and Actions Row Line C Sequence Waypoint No. Waypoint Descrip	 Document No. Currency Code Invoice No. Type 107217 565 Charge (1000) 	No. Description te <u>P-EREIGHT Misc. Freight Charge (Purch.)</u>	년 년 Transportation Weight Volume Distance	to any Delivery Orders
	→ 10 Image: Model in the matrix of the mat	→ 🕑 107218 : 654545 Charge (te J <u>B-FREIGHT Freight Charge (JB-Spedition)</u>	0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00	
	Totals				
Menu Item	Charges Manage <u>Assignment</u> Functions				
	Type Charge No. Description → Purchases : JB-FREIGHT Freight C	4		d Amount Source Document Assigned Amount to 200.00 Purchase Invoice	



Allocate costs across transported orders. In the **Charges** section of the Delivery Order document, click the **Assignment** menu item to open a window where you can set cost allocation either automatically, based on specific parameters, or manually.

	← Delivery Order DLV019											
← (Delivery Charges Assigment	harge Assignment	Apply Update	More options	5							
	🔆 Equally 👶 By Distanc	e 🗦 By Weight	🔆 By Volume	🔆 By Footage	夺 By Number of Logis	tic Units 🛛 🔢 Clear Ar	nount to Assign					
_		Assign charge an	ount by distance									
	Shipper Name	Consignee Nam	ie	Distance	Weight	Volume	Footage					
	CRONUS UK Ltd.	Coca Cola Lto	ł	40.48	351.75	0.00	0.00					
	CRONUS UK Ltd.	Village des V	aleurs	34.40	516.64	0.00	0.00					
	CRONUS UK Ltd.	IGA Ltd		27.29	205.11	0.00	0.00					
\rightarrow	CRONUS UK Ltd.	CDE Stores Lt	td	77.25	218.05	0.00	0.00					
			Charge		To Ass	ign						
	Fr	eight Charge (JB-Spe	edition)		500	.00						
	🚟 Purchase Invoice	e 🔮 Assignment										
		Ch	arge Assignment									
	Туре	Charge No. D	escription	Custon	ner/Vendor Name	Quantity	Price A	m				



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No. of Logistic Units	An	nount to Assign	Transport Re	equest No.		Tr	anspor	t Request Lines
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0		95.86	TR064					2
0		76.05	TR065					2
0		215.28	TR066					2
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500.0	•						0.00	
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nount Assign	ed Amount	Source Document	Assigned to Sou	Amount urce Line				

Apply the allocated charger across orders to the items within those orders.

← Del	ivery Cha	arge	s Assigment Suggest	Char	rge Assignmer	it <u>Apply</u> U	Jpdate	More options			
•	Apply	lte	Show Iten m Charge	n Ch As	arge Assignme signment (ent Purch) - JB-	FREIGHT	Freight Charge (JB-Spec	lition)		
	si a	Μ	anage 🛛 👯 S	ugge	est Item Charge	Assignment	🖺 Get Recei	pt Lines 🛛 📮 Get Sales Shipment Li	ines 🏾 🎽 Get Trans	fer Receipt Lines	騿 Get Return R
	CRC		Applies-to Doc. Type		Applies-to Doc. No.	Applies-to Doc. Line No.	Item No.	Description	Qty. to Assign	Qty. to Handle	Qty. Assigned
	CRC	\rightarrow	Sales Ship	- :	102226	10000	<u>1896-S</u>	ATHENS Desk	0.03333	0.03333	
			Sales Ship		102226	20000	1900-S	PARIS Guest Chair, black	0.03334	0.03334	
			Sales Ship		102226	30000	1908-S	LONDON Swivel Chair, blue	0.03333	0.03333	
			Sales Ship		102227	10000	1896-S	ATHENS Desk	0.3	0.3	
			Sales Ship		102227	20000	1900-S	PARIS Guest Chair, black	0.3	0.3	
			Sales Ship		102227	30000	1928-S	Red Swivel Lamp	0.3	0.3	
		4									
tem Lines of							Ass	ignable	To Assign	Rem	. to Assign
he Sales		Tot	al (Qty.)					1	1		0
Order #1		Tot	al (Amount)				1	,000.00	1,000.00		0.00

			√ Saved	d ⊏″ ,≝
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				Ŕ
			,,⊻ ×	Transport Dopuert
eceipt Lines 🛛 🐻	Get Return Shipr	ment Lines	Ŕ	Lines
				2
Amount to	Amount to			2
Assign	Handle	Gross Weight	Unit Volume	2
33.33	33.33	39.79	1.2	2
33.34	33.34	9.55	0.25	}
33.33	33.33	15.99	0.25	J 🔪
300.00	300.00	39.79	1.2	
300.00	300.00	9.55	0.25	
300.00	300.00	4.03	0.03	
			Þ	Item Lines of
	To Handle		Rem. to Handle	Order #2
	1		0	
	1,000.00		0.00	



Let's examine the details of the transportation charge allocation process with a simple example of purchasing and selling an item, paying for its delivery to the carrier, and reflecting these transactions in Item Ledger Entries and Value Entries in Business Central.









Step 1. Posting a Purchase Order increases asset value (the cost of goods in inventory), which is reflected in the **Cost Amount (Actual)** field in item transactions and linked value entries.





Step 2. Posting a Purchase Invoice from the actual carrier for truck freight services and other transportation costs related to the delivery of the purchased item.



Delivery of goods to the warehouse

100 EUR

Item 1008	3 Tires														Д	c,
Item Ledg	ger Entr	ies 🛛 🥼 🗸	₽ 🖪	🛕 Find	l entries E	ntry 📑 Or	rder Tracking 🛛 🖺	Application Workshee	t Mor	e options					Ŕ	7 =
Posting Da	ate	Entry Type	Document Type	t Do	ocument No.	Item No. 🝸	Location Code	Quantity	Invoiced Q	uantity	Remaining Quantity	Sales Amount (Actual)	Cost Amount (Actual)	Cost Amount (Non- Invtbl.)	Open	Entry No.↓
4/8/2024	<u>1</u>	: Purchase	Purchase	e Rec 1(07232	1008	EAST	10		10	10	0.00	<u>200.00</u>	0.00		710
Item Ledg	jer Entry	/ 710													Д	с,
Value Entr	ries	Ø⊃	🖸 🗌 🔂 Fi	ind entrie	s Entry	More opt	tions								ĿĊ	7 =
Posting Da	ate	Item Ledger Entry Type	Entry Type	Adj	Document Type	Document No.	ltem Charge No.	Item Ledger Entry Quantity	Invoiced Quantity	Valued Quanti	Cost Amount ty (Expected)	Sales Amount (Actual)	Cost Amount (Actual)	Cost Amount (Non-Invtbl.)	Cost Posted 1 G	o 'L Cos
4/8/2024	<u>1</u> :	Purchase	Direct Cost		Purchase In.	. 108218	JB-FREIGHT	0	0	1	10 0.00	0.00	100.00	0.00	100.0	0
4/8/2024	1	Purchase	Direct Cost		Purchase In.	. 108217		10	10	1	10 0.00	0.00	100.00	0.00	100.0	0



Step 3. Sell the item to the customer. Post Sales Order.







				Д	d,	, K
				Ŕ	7	
	Sales Amount (Actual)	Cost Amount (Actual)	Cost Amount (Non- Invtbl.)	Open E	ntry No.	Ť
	0.00	200.00	0.00		71	0
	350.00	-200.00	0.00		71	1
				Д	с,	~ [¥]
				Ŕ	7	
unt ed)	Sales Amount (Actual)	Cost Amount (Actual)	Cost Amount (Non-Invtbl.)	Cost Posted to G/L	0	ost p
.00	350.00	-200.00	0.00	-200.00)	

Step 4. Post Purchase Invoice from the actual carrier #2 for truck freight services (transportation costs) related to the delivery of the sold item to the customer. Allocating transportation costs for a sales order does not increase asset value.



Delivery of goods to the customer

100 EUR

~	Item 1008 Tires									
	Item Ledger Ent	ries 🖉 🗸	P 🖪	🔁 Find entries	Entry 📑 O	rder Tracking 🛛 🖺	Application Worksheet	More o	ptions	
	Posting Date	Entry Type	Document Type	Document No	. Item No. 🝸	Location Code	Quantity	Invoiced Quan	Re tity (maining Quantity
	4/8/2024	: Purchase	Purchase	Rec 107232	1008	EAST	10		10	0
	<u>4/8/2024</u>	: Sale	Sales Ship	ome 102233	1008	EAST	-10		-10	0
÷	Item Ledger Entr	ry 711								
	Value Entries	Øb ∨ ,Ω	🖪 🗌 💽 Fir	nd entries Entr	y More op	otions				
	Posting Date	ltem Ledger Entry Type	Entry Type	Documen Adj Type	t Document No.	item Charge No.	ltem Ledger Entry Quantity	Invoiced Quantity	Valued Quantity	Cost Amour (Expected
	<u>4/8/2024</u>	Purchase	Direct Cost	Purchase	e In 108219	JB-FREIGHT	0	0	-10	0.0
	4/8/2024	Sale	Direct Cost	Sales Inv	voice 103218		-10	-10	-10	0.0





Step 5. Invoice the customer for item delivery by posting a Sales Invoice with charges allocated to the sales order.





Transportation Management System

Scheduler

Capability Guide. Scheduler

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

	,	_0	01/.	31/1	20	Pla	anr	nng	j by	ve ve	nici	е											
	Previous Select Period	iod 🛛	Next	*	Settin	igs	🖰 Upo	date	Resou	urces													
	Carriers 🗊 Vehicle	🔁 Dr	rivers	P 1	Time S	lots																	
		L					Weel	k 01. Ja	anuarv					Week	: 02. Ja	Inuarv	lanua	ry			Weel	k 03. Ja	nuarv
The list of resources		01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22
used for order	Undefined																						
allocation	TRK 34 - Volvo FH 987																						
Carrier Vehicle	TRK 66 - Volvo FM																						
Driver	TRK 04 - SCANIA R590																						
	TRK 05 - Volvo FL																						
	Volvo Truck 433																						
	TRK 75 - SCANIA R590																						
	TRK 72 - SCANIA R590																						
	Transport Requests																						





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.

select Per	The settings Opda			
Carriers D Vehicle	🛱 Drivers 🛱 Time Slots	Scheduler Setup	2 X	\$2
	Week	Period		nuary Week 04, January
Undefined	01 02 00 04 00 00	Туре		
TRK 34 - Volvo FH 987		Period Type Month	ı	
TRK 66 - Volvo FM		Day Work		
TRK 04 - SCANIA R590		Period Start Month	· · · · · · · · · · · · · · · · · · ·	
TRK 05 - Volvo FL		Period End Quarte	er 👘	
Volvo Truck 433				
TRK 75 - SCANIA R590		Scheduled Resource		
TRK 72 - SCANIA R590		Scheduled Resource Vehicl	e 🗸	



Transportation Management System

Carriers Vehicles Drivers

Capability Guide. Carriers

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

Carrier (TMS) Work Date: 1/23/2	2026		+ 🖻			✓ Saved 🗍 🖆 🤈
M9 LOGISTICS						
Navigate <u>Setup</u> More	options					•
∦ [≇] Drivers ∦ [≇] Vehicles	≰ [#] Drivers					5
General				Show more	i Details 🛛 Att	achments (0)
No	M9 LOGISTICS	Mode of Transport	ROAD	~	Picture ∨	
Name · · · · · · · · · · · · · · · · · · ·	M9 Logistics	Blocked · · · · · · · · · · · · · · · · · · ·				
Freight Agreement No.	·	Truckload Shipping Type	None	~		
Freight Agreement No.		Truckload Shipping Type	None	~	R	
Freight Agreement No. · · · · · · · · · · · · · · · · · · ·		Truckload Shipping Type	None	~		
Freight Agreement No		Truckload Shipping Type	None	~		
Freight Agreement No	TRUCK0432	Truckload Shipping Type Vehicle Unit Type Default Unit Type	None	~		
Freight Agreement No	TRUCK0432	Truckload Shipping Type Vehicle Unit Type Default Unit Type Default Unit Type Description	None	~		
Freight Agreement No	TRUCK0432	Truckload Shipping Type Vehicle Unit Type Default Unit Type Default Unit Type Description	None	~	Attachments >	
Freight Agreement No	TRUCK0432 Volvo Truck 433	Truckload Shipping Type Vehicle Unit Type Default Unit Type Default Unit Type Description	None	~	Attachments >	
Freight Agreement No. Defaults Vehicle Default Vehicle No. Default Vehicle Name Driver Default Driver No. Default Driver Name	TRUCK0432 Volvo Truck 433 ED Ed Korso		None	~	Attachments \vee File	Categ



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.

Vehicle (TMS) Work Date: 1/2	23/2026			√ Saved	
TRR2					
Navigate					0
General			Show more) Details 🛛 Attachments (0)
No	TRR2	Manufacturer · · · · · · Scania		Picture ~	Î
Name ·····	TRK 04 - SCANIA R590	Year	2019		Sec. 1
Vehicle Type	Car 🗸	Color · · · · · · · · · white			-12
Model · · · · · · · · · · · · · · · · · · ·	R560	Default Map Location	~	The second and	
Carrier				SCANIA C	
Carrier No.	DE v	Carrier Name · · · · · · · Oleg Lobakov			and the second se
					-
Defaults					
Default Driver No.	×	Default Driver Name		Attachments \checkmark	



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.

Vehicle (TMS) Work Date: 1/2	3/2026	A B	+ 👜
TRR2			
Navigate			
Type / Sizes			
Unit Type Code	C20FRC V	Sizes	
Unit Type Description	20' Flat Rack container	Unit Type - Linear UoM	MM
Unit Type - Volume UoM · · ·	M3	Unit Type - Internal Length	5,93
Unit Type - Volume	33.12	Unit Type - Internal Width	2,39
		Unit Type - Internal Height	2,32
Peristration			
Registration			
Registration No.	PMA703	VIN No	G839829384924
Registration Date	4/5/2019		
Engine			
Engine Type	Diesel \lor	Engine Power	56
Engine No.	4358734	Engine Model	FH





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.

Ve	hicle (TMS) Work	k Date	2: 1/23/2026				O B	+	Ū		
Т	RR2										
Ν	Navigate										
Fix	xed Asset										
1	rad Accat Na		FA00002	0	\sim	Fixed Asse	t Decription	Toyota Supr	ra 3.0		
Fix	eu Asset No.				7.5						
Fix	Depreciation Bo	ooks	Manage	Depr. Book						Ŕ	6
Fix	Depreciation Bo	ooks X Del	Manage ete Line	Depr. Book						Ŕ	5
Fix	Depreciation Be [#] New Line Depreciation Book Code ↑	ooks X Del	Manage ete Line FA Posting Group	Depr. Book	Depreciation Starting Date	No. of Depreciation Years	Depreciation Ending Date	Declining- Balance %	Dis Of	Book	E S : Val





Capability Guide. Drivers

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

	← Driver (TMS) Work Date: 1/23/2026	✓ Saved 🗍 🗖 🦯
	ED	
	Navigate	0
	General Show more	Oetails Attachments (0)
	No ED Full Name	Picture ~
	Name · · · · · · Ed Korso Fuel Card No. · · · · · · · · · · · · · · · · · · ·	
e field indicates nich carrier the ver belongs to.	Carrier	
-	Carrier No M9 LOGISTICS V Carrier Name M9 Logistics	
	Defaults	
	Default Vehicle No. · · · · · TRUCK0432 · Default Vehicle Name · · · · Volvo Truck 433	
e default vehicle		Attachments ~
ected when this	Personal Information	
ver is chosen in	Birth Date · · · · · · · I/5/1987 🛗 Medical Card Number · · · · ZGN002456573	rile Categ
e delivery order.	Employment Date	(There is nothing to show in this view)





