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.

- ✓ Order Grouping
- ✓ Routes and Zones
- ✓ Load Management
- ✓ Route Management
- ✓ Weight, Volume, Footage Control
- ✓ Load Sequencing & Optimization

- ✓ Charge Management
- ✓ Scheduler
- ✓ 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
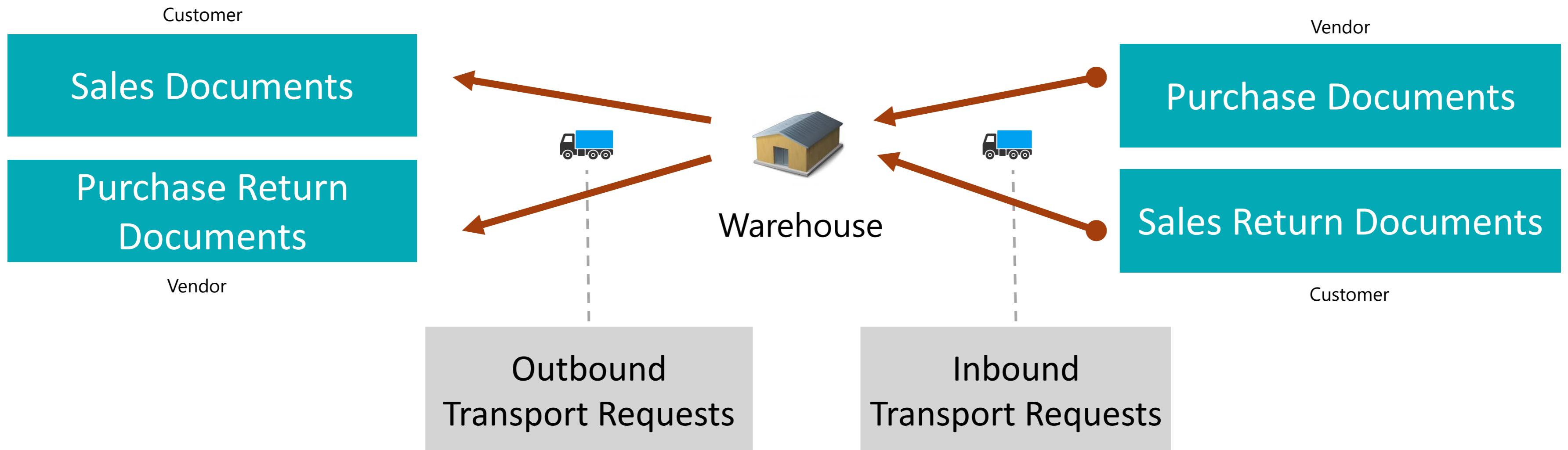
Capability Guide. Transport Request

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

- ✓ **Order Grouping**
- ✓ **Routes and Zones**
- ✓ **Load Management**
- ✓ Route Management
- ✓ Weight, Volume, Footage Control
- ✓ Load Sequencing & Optimization

- ✓ Charge Management
- ✓ Scheduler
- ✓ 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

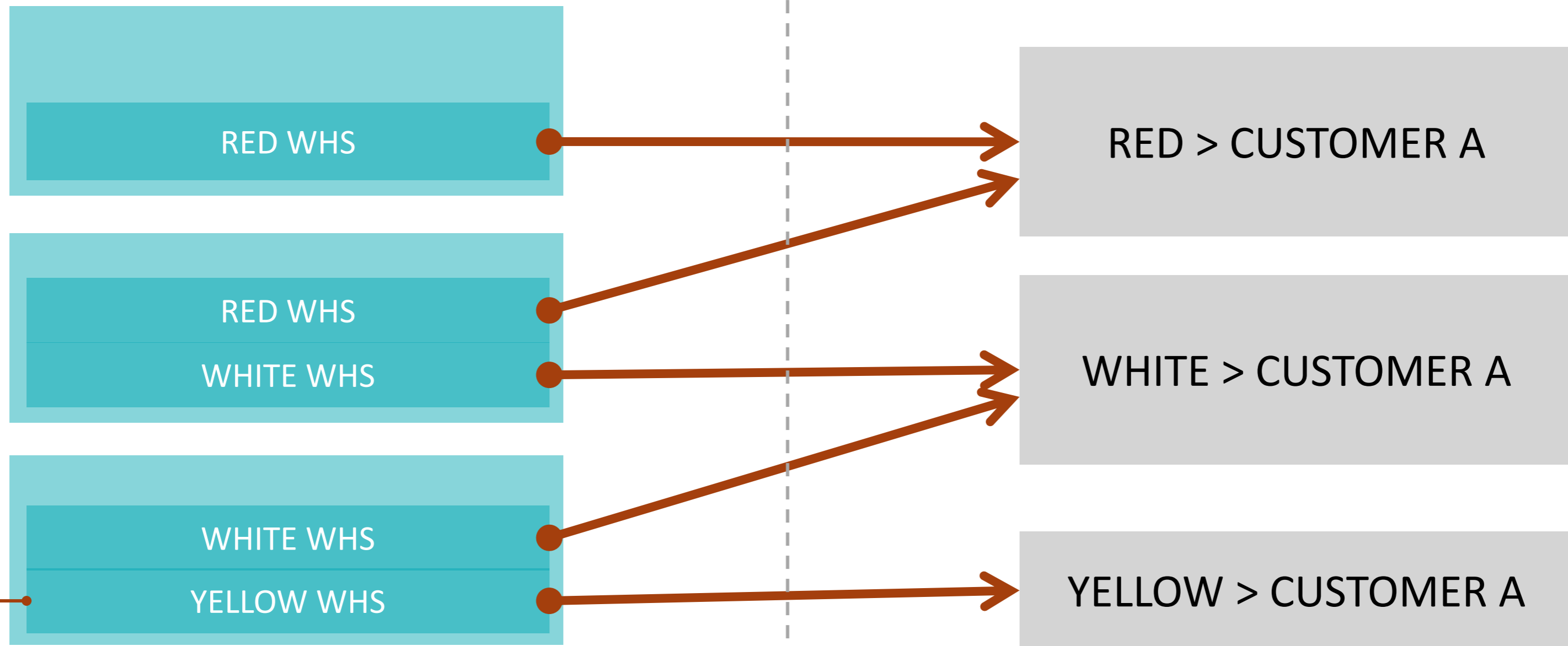Vendor ➝ Warehouse

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

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

WHITE WHS

Document Lines

YELLOW WHS

RED > CUSTOMER A

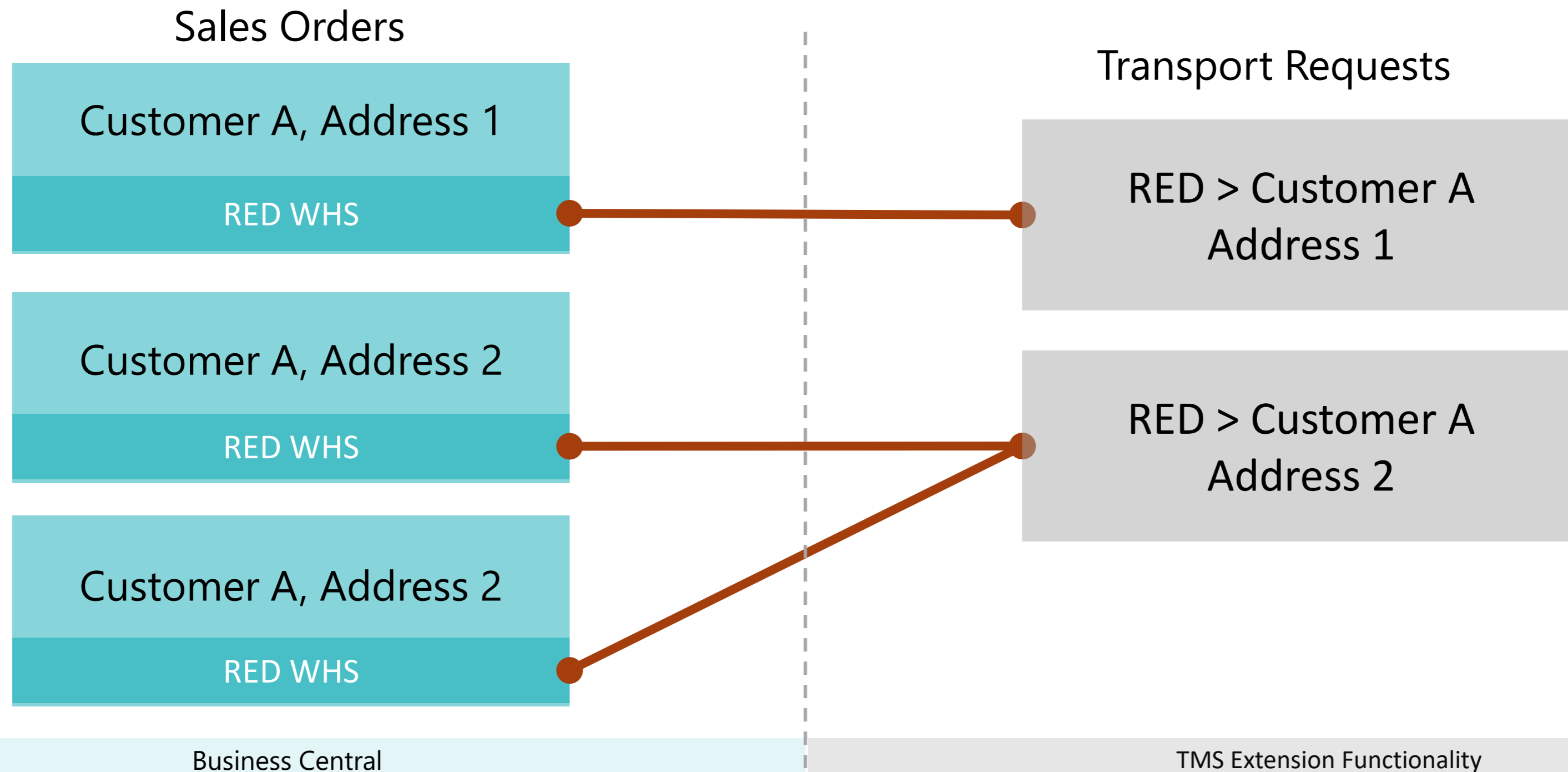WHITE > CUSTOMER A

YELLOW > CUSTOMER A

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

Customer A, Address 2

RED WHS

Customer A, Address 2

RED WHS

RED > Customer A Address 1

RED > Customer A Address 2

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.		⌄
Status	Released	

Transportation Distance (km)	0.00
Transportation Duration	

Shipper

Shipper Type	Location	⌄
Shipper Name	CRONUS UK, Ltd.	
Load Address Code	YELLOW	⌄
Load Address	Main Bristol Street, 10	
Load Address, City	Bristol	

Consignee

Consignee Type	Customer	⌄
Consignee Name	Zanlan Corp.	...
Unload Address Code		⌄
Unload Address		
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.	
Status	Released

Transportation Distance (km)	0.00
Transportation Duration	

Shipper

Shipper Type	Location
Shipper Name	CRONUS UK, Ltd.
Load Address Code	YELLOW
Load Address	Main Bristol Street, 10
Load Address, City	Bristol

Consignee

Consignee Type	Customer
Consignee Name	Zanlan Corp.
Unload Address Code	
Unload Address	
Unload Address, City	

# 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
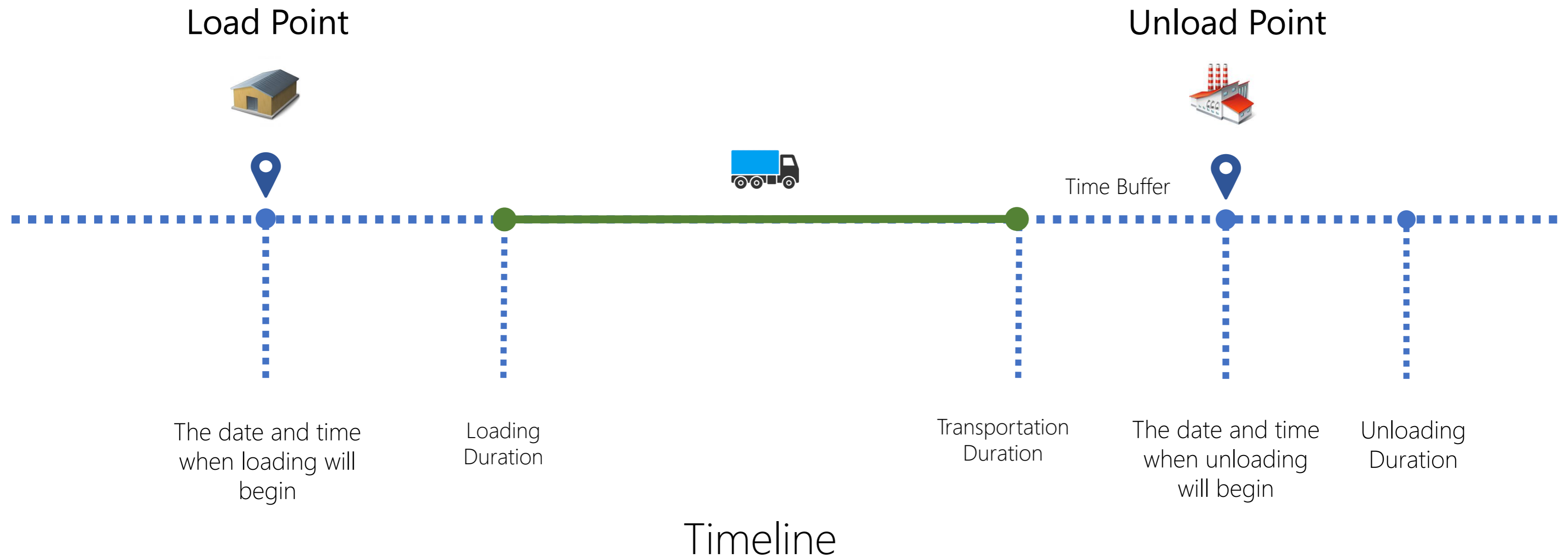
Capability Guide. Transport Request

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
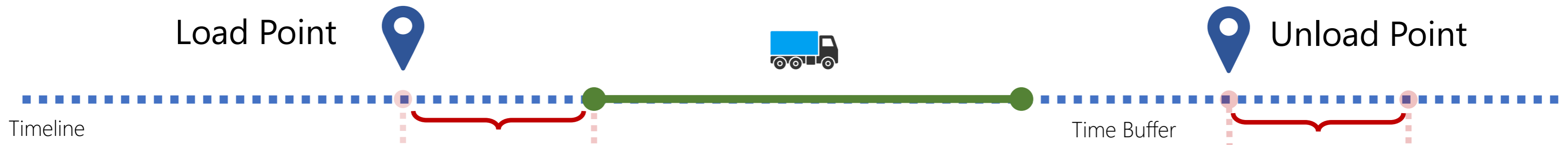
Transport Request | Work Date: 1/23/2026

✓ 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.

Delivery Order

Capability Guide. Delivery Order

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

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

- Charge Management
- Scheduler
- 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.

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

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

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
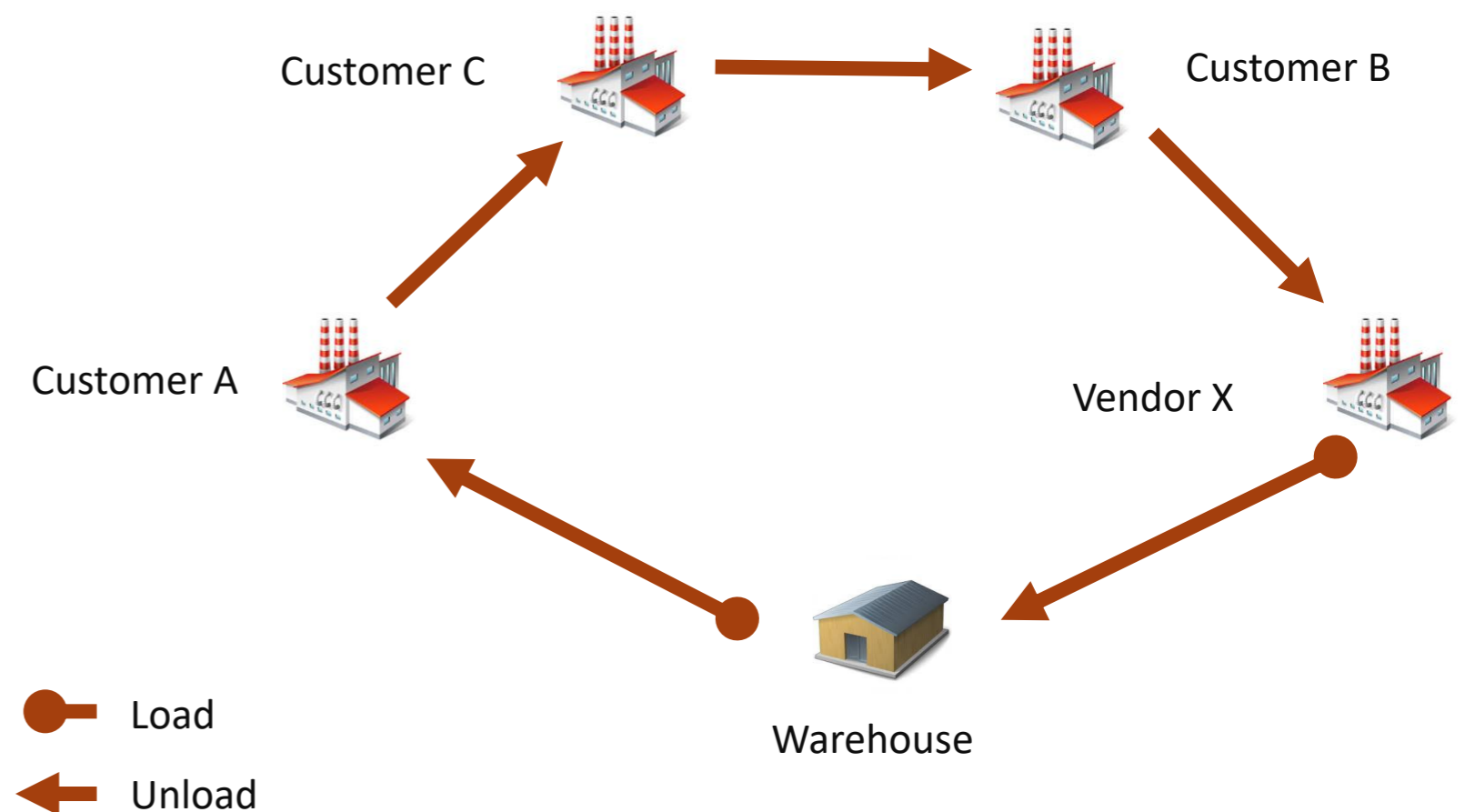
● Load

← 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 Sequence

Customer
A

Customer
C

Customer
B
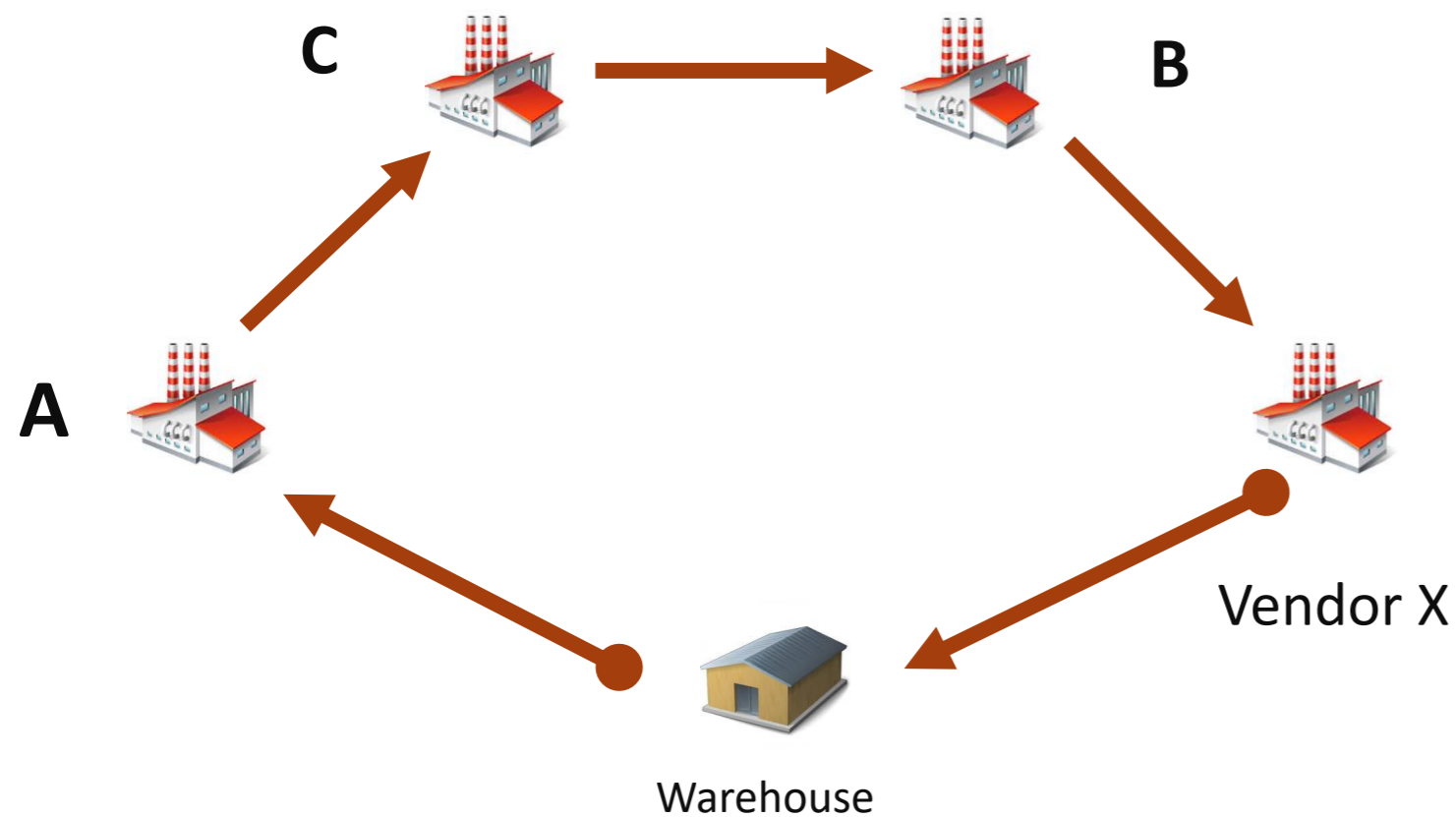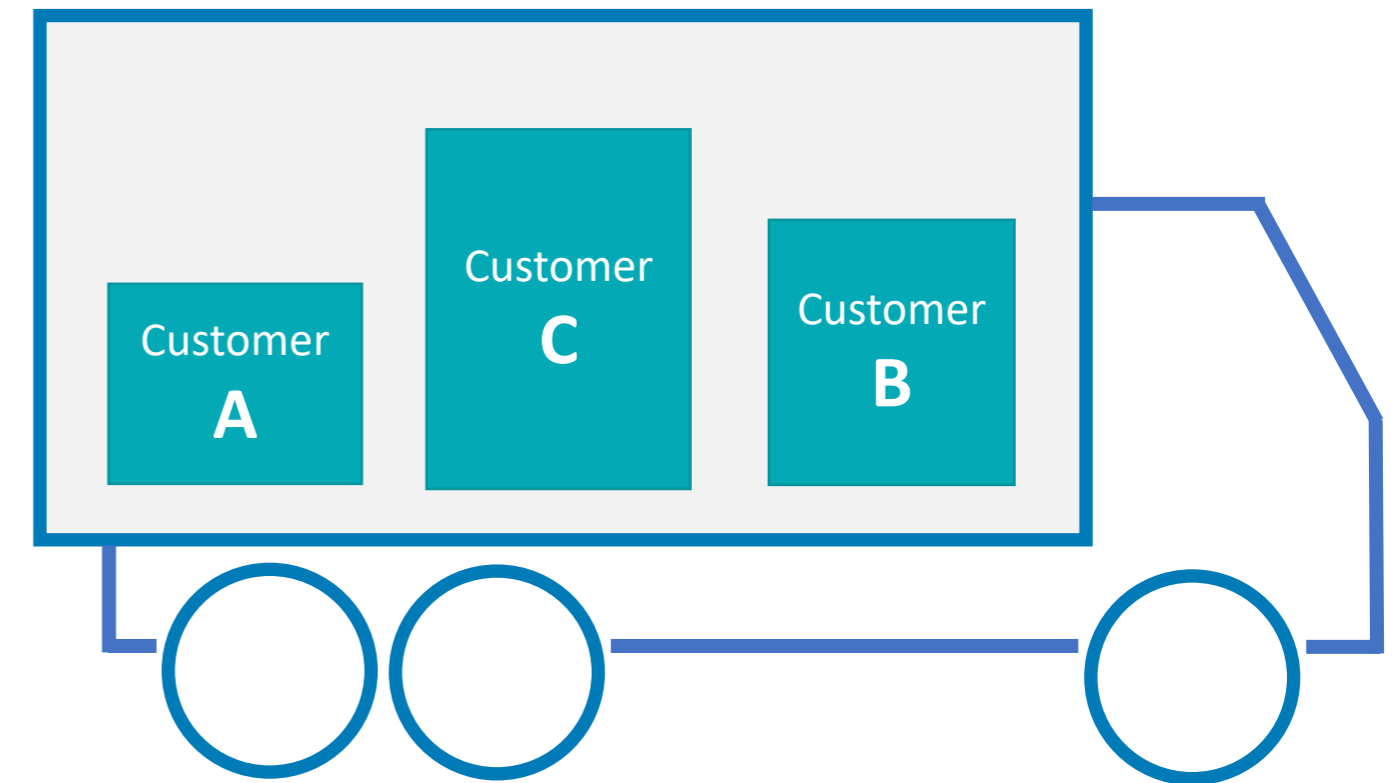
Load

Unload

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
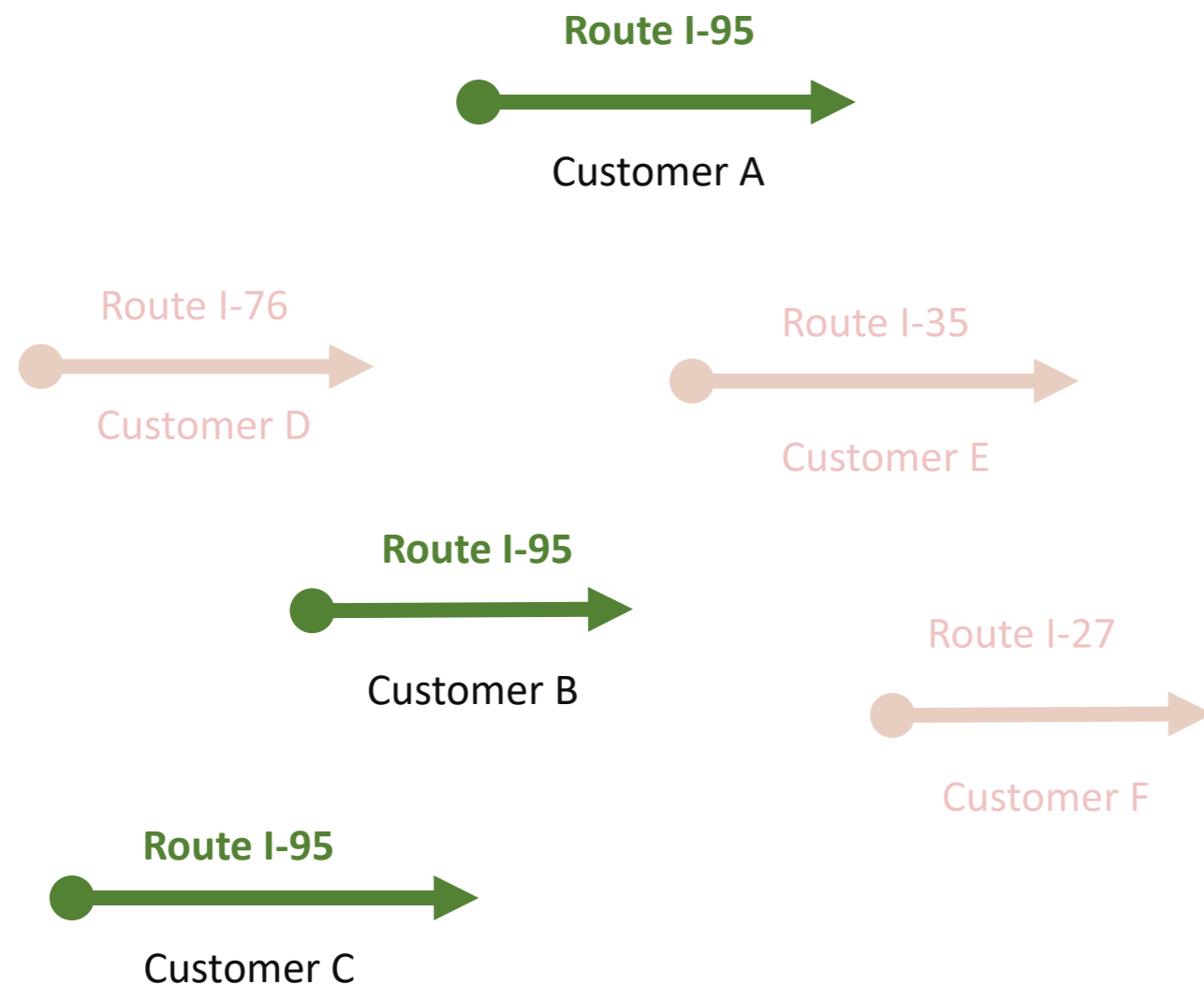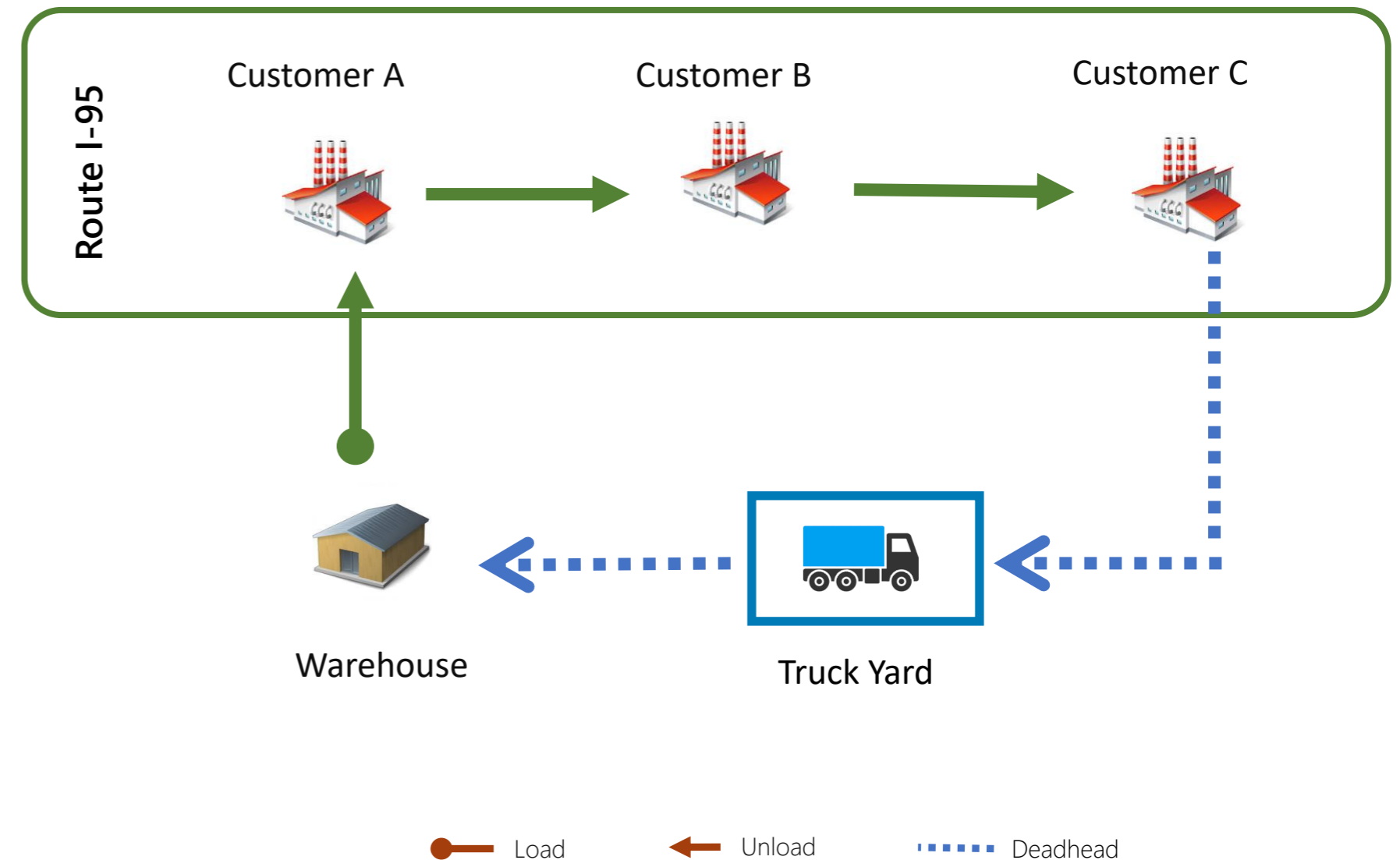
Warehouse   Customer A   Customer B   Customer C

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
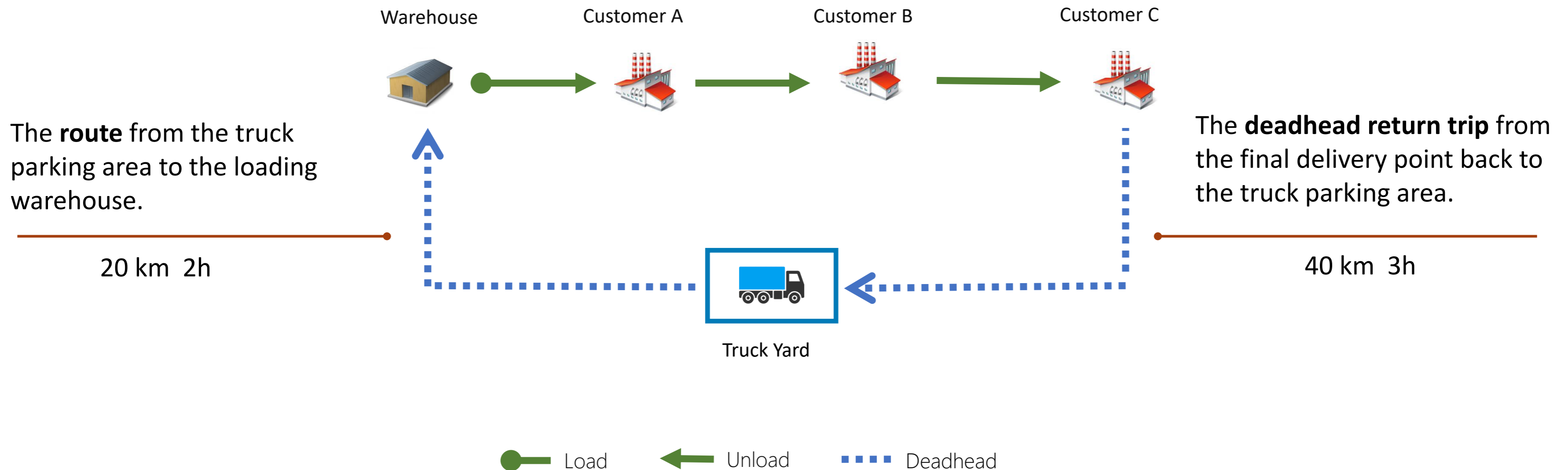
Capability Guide. Delivery Order

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
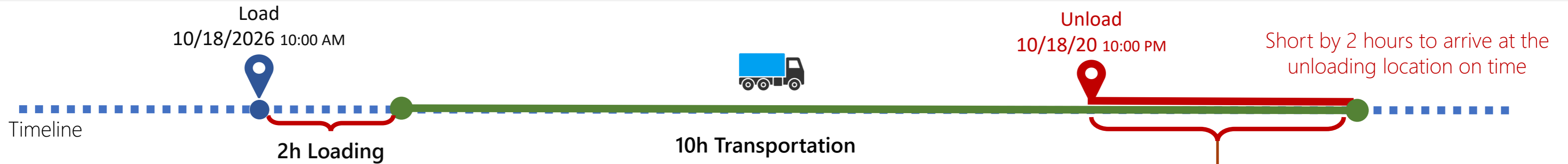
ℹ **Unable to meet the scheduled unloading time.**

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

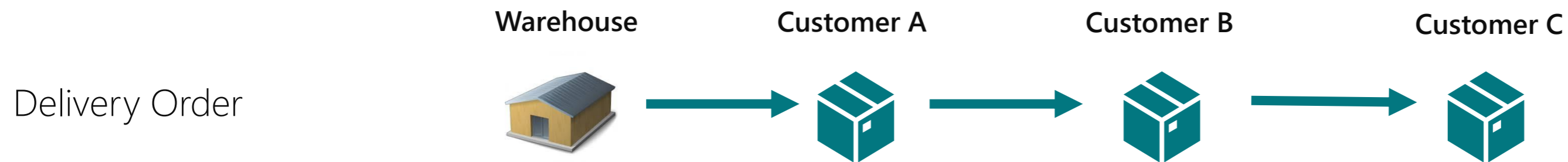# Charge Management

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.

Delivery Order

Warehouse → **Customer A** → **Customer B** → **Customer C**

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.

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.

Carrier Freight Invoice

Delivery Order

Warehouse   **Customer A**   **Customer B**   **Customer C**
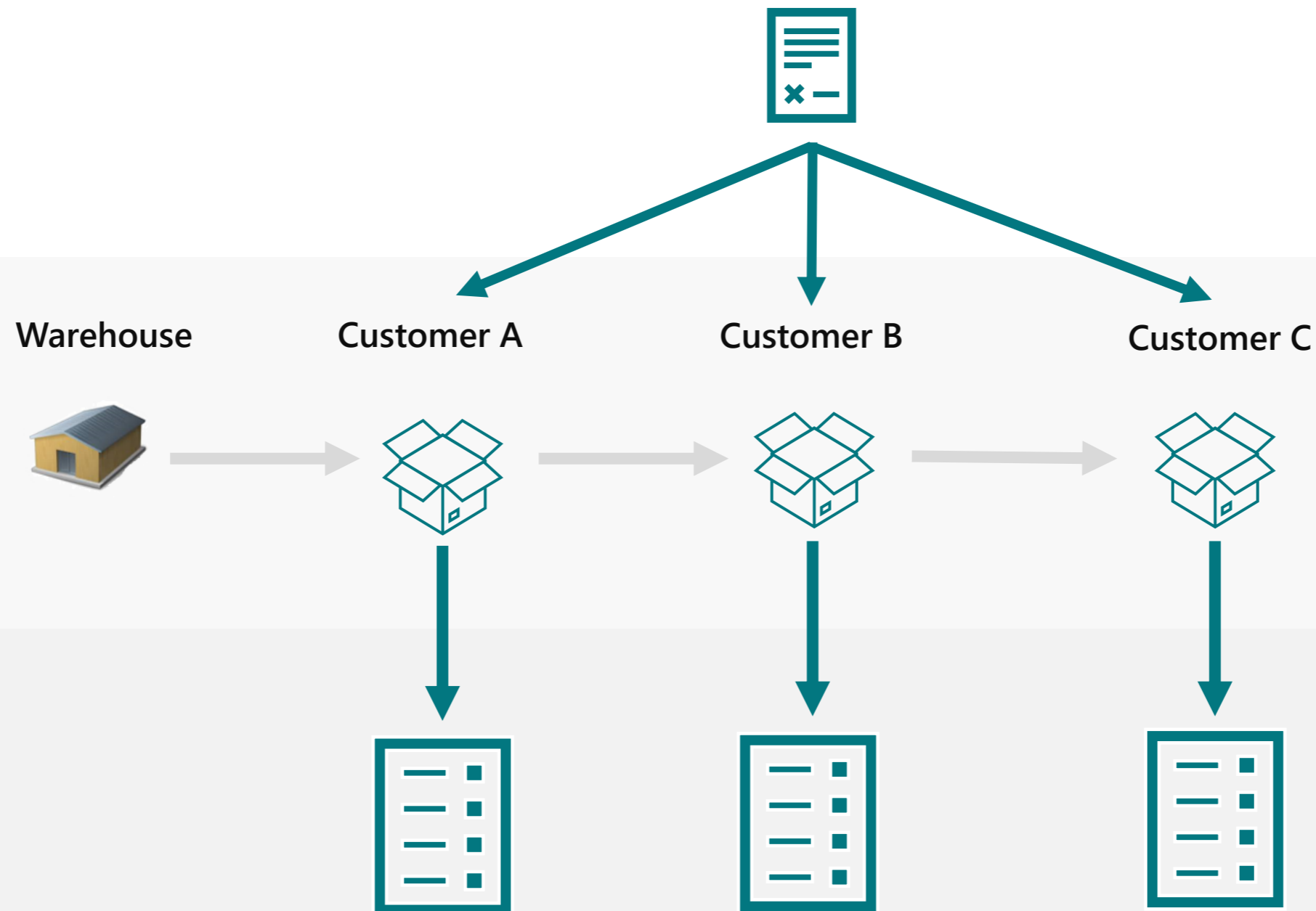
Distribution by:
- Distance
- Weight
- Volume
- Footage
- No. of Logistic Units
- Equally
- **Your own**

Posted Sales Lines

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

Home   Get Documents   Route   Optimization   Print   More options

⬀ Release | ∨   🗔 Post   ⬚ Refresh Lines

General

Route No.	EAST
Carrier Name	Subcontractor
Vehicle Name	
Driver Name	
Status	Open

Route Stops and Actions   ⬚ New Line   ⬚ Delete Li

Purchase Invoice

107223 · Subcontractor

Home   Prepare   Request Approval   Invoice   TMS   More options

🗔 Post | ∨   ⬀ Release | ∨

VAT Date	
Due Date	
Vendor Invoice No.	
Status	

← Item Charges   ✓ Saved   🔖 ⬈ ⬚

⬙ ∨   🔍   ⬚   + New   📝 Edit List   🗑 Delete   Item Charge   More options   ⬈ ▽ ☰

	No. ↑	Description	Gen. Prod. Posting Group	VAT Prod. Posting Group	Search Description	Freigh…
→	JB-FREIGHT	Freight Charge (JB-Spedition)	SERVICES	STANDARD	FREIGHT CHA…	☐
	P-ALLOWANCE	Purchase Allowance	SERVICES	STANDARD	PURCHASE A…	☐
	P-FREIGHT	Misc. Freight Charge (Purch.)	SERVICES	STANDARD	MISC. FREIGH…	☐
	P-RESTOCK	Purchase Restock Charge	SERVICES	STANDARD	PURCHASE RE…	☐
	S-ALLOWANCE	Sales Allowance	SERVICES	STANDARD	SALES ALLOW…	☐

⬚ Delete Line

Capability Guide. Charge Management. How it works

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**.

Don't forget to add your charges to this directory.

A field indicating that this transportation charge is allocated to the items of transported orders.

Capability Guide. Charge Management. How it works

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.

Purchase invoice lines with item charges not linked to any Delivery Orders

Menu Item

Capability Guide. Charge Management. How it works

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.

Capability Guide. Charge Management. How it works

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

Item Lines of the Sales Order #1

Item Lines of the Sales Order #2

Capability Guide. Charge Management. **Details**

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.

Vendor

Warehouse

Customer

10 PCS 10 EUR

Purchase

10 PCS 35EUR

Sale

Delivery of goods
to the warehouse

100 EUR

Delivery of goods
to the customer

100 EUR

Invoice the customer
for item delivery

100 EUR + 50%
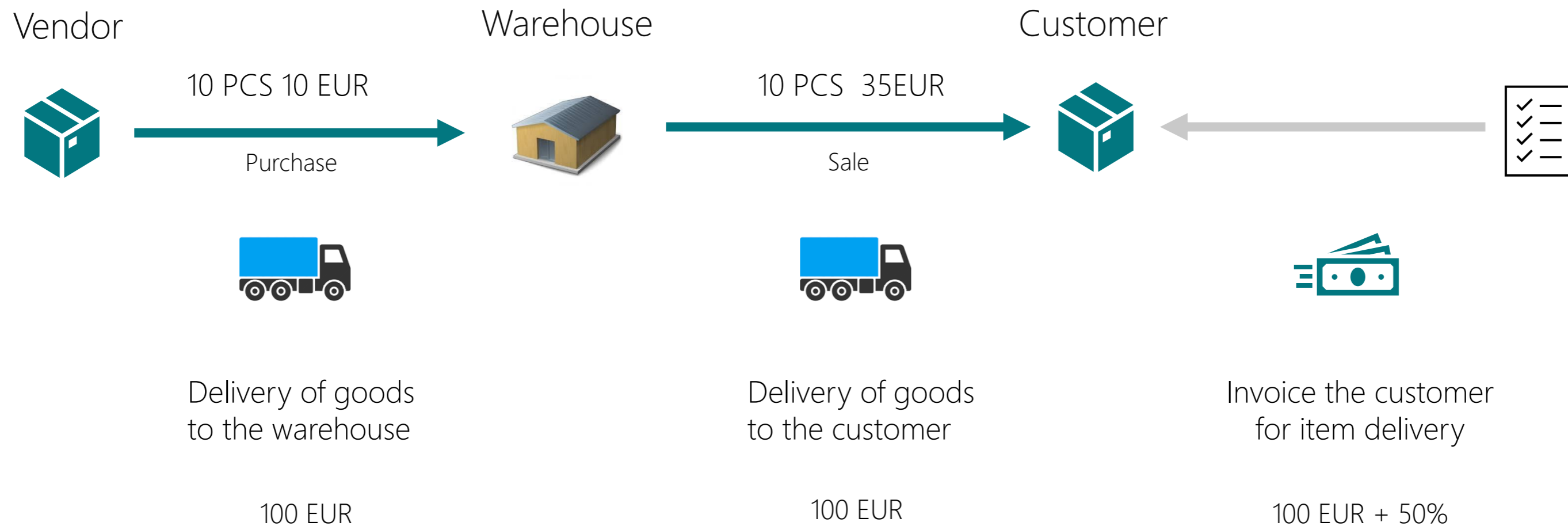
Capability Guide. Charge Management. Details

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.

Vendor   Warehouse

10 PCS 10EUR

Item 1008 Tires

Item Ledger Entries | Find entries… Entry | Order Tracking | Application Worksheet | More options

Posting Date	Entry Type	Document Type	Document No.	Item No.	Location Code	Quantity	Invoiced Quantity	Remaining Quantity	Sales Amount (Actual)	Cost Amount (Actual)	Cost Amount (Non-Invtbl.)	Open	Entry No. ↓
4/8/2024	Purchase	Purchase Rec…	107232	1008	EAST	10	10	10	0.00	100.00	0.00	☑	710

Item Ledger Entry 710

Value Entries | Find entries… Entry | More options

Posting Date	Item Ledger Entry Type	Entry Type	Adj…	Document Type	Document No.	Item Charge No.	Item Ledger Entry Quantity	Invoiced Quantity	Valued Quantity	Cost Amount (Expected)	Sales Amount (Actual)	Cost Amount (Actual)	Cost Amount (Non-Invtbl.)	Cost Posted to G/L	Cost p
4/8/2024	Purchase	Direct Cost	☐	Purchase In…	108217		10	10	10	0.00	0.00	100.00	0.00	100.00	

Capability Guide. Charge Management. Details

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.

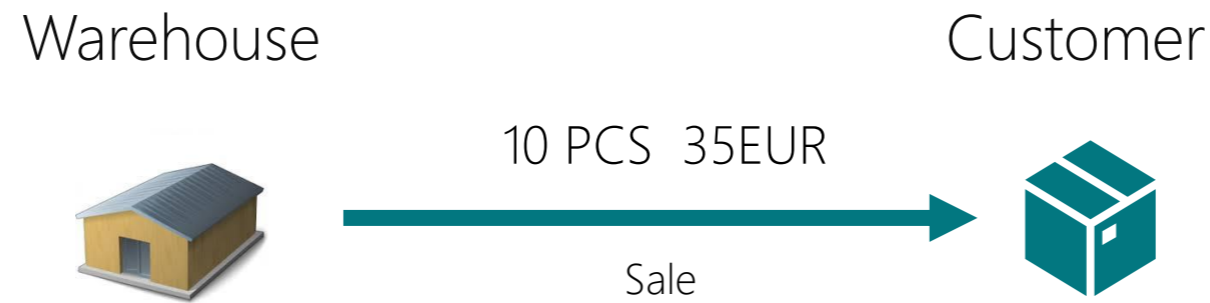Delivery of goods to the warehouse   100 EUR

Item 1008 Tires

Item Ledger Entries | Find entries...   Entry   Order Tracking   Application Worksheet   More options

Posting Date	Entry Type	Document Type	Document No.	Item No.	Location Code	Quantity	Invoiced Quantity	Remaining Quantity	Sales Amount (Actual)	Cost Amount (Actual)	Cost Amount (Non-Invtbl.)	Open	Entry No. ↓
4/8/2024	Purchase	Purchase Rec...	107232	1008	EAST	10	10	10	0.00	200.00	0.00	☑	710

Item Ledger Entry 710

Value Entries | Find entries...   Entry   More options

Posting Date	Item Ledger Entry Type	Entry Type	Adj...	Document Type	Document No.	Item Charge No.	Item Ledger Entry Quantity	Invoiced Quantity	Valued Quantity	Cost Amount (Expected)	Sales Amount (Actual)	Cost Amount (Actual)	Cost Amount (Non-Invtbl.)	Cost Posted to G/L	Cost p
4/8/2024	Purchase	Direct Cost	☐	Purchase In...	108218	JB-FREIGHT	0	0	10	0.00	0.00	100.00	0.00	100.00	
4/8/2024	Purchase	Direct Cost	☐	Purchase In...	108217		10	10	10	0.00	0.00	100.00	0.00	100.00	

Capability Guide. Charge Management. Details

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

Warehouse   Customer

10 PCS 35EUR

Sale

Item 1008 Tires

Item Ledger Entries   Find entries...   Entry   Order Tracking   Application Worksheet   More options

Posting Date	Entry Type	Document Type	Document No.	Item No.	Location Code	Quantity	Invoiced Quantity	Remaining Quantity	Sales Amount (Actual)	Cost Amount (Actual)	Cost Amount (Non-Invtbl.)	Open	Entry No. ↑
4/8/2024	Purchase	Purchase Rec...	107232	1008	EAST	10	10	0	0.00	200.00	0.00	☐	710
4/8/2024	Sale	Sales Shipme...	102233	1008	EAST	-10	-10	0	350.00	-200.00	0.00	☐	711

Item Ledger Entry 711

Value Entries   Find entries...   Entry   More options

Posting Date	Item Ledger Entry Type	Entry Type	Adj...	Document Type	Document No.	Item Charge No.	Item Ledger Entry Quantity	Invoiced Quantity	Valued Quantity	Cost Amount (Expected)	Sales Amount (Actual)	Cost Amount (Actual)	Cost Amount (Non-Invtbl.)	Cost Posted to G/L	Cost p
4/8/2024	Sale	Direct Cost	☐	Sales Invoice	103218		-10	-10	-10	0.00	350.00	-200.00	0.00	-200.00	

Capability Guide. Charge Management. Details

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 Entries   Find entries...   Entry   Order Tracking   Application Worksheet | More options

Posting Date	Entry Type	Document Type	Document No.	Item No.	Location Code	Quantity	Invoiced Quantity	Remaining Quantity	Sales Amount (Actual)	Cost Amount (Actual)	Cost Amount (Non-Invtbl.)	Open	Entry No. ↑
4/8/2024	Purchase	Purchase Rec...	107232	1008	EAST	10	10	0	0.00	200.00	0.00	☐	710
4/8/2024	Sale	Sales Shipme...	102233	1008	EAST	-10	-10	0	350.00	-200.00	-100.00	☐	711

Item Ledger Entry 711
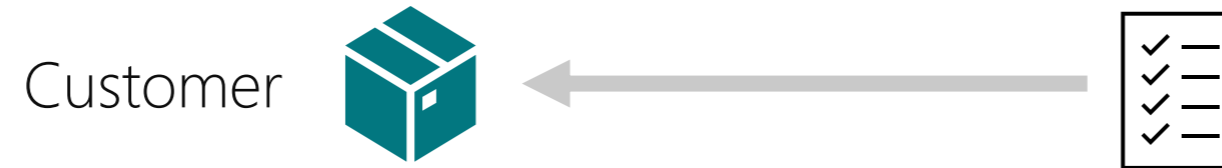
Value Entries   Find entries...   Entry | More options

Posting Date	Item Ledger Entry Type	Entry Type	Adj...	Document Type	Document No.	Item Charge No.	Item Ledger Entry Quantity	Invoiced Quantity	Valued Quantity	Cost Amount (Expected)	Sales Amount (Actual)	Cost Amount (Actual)	Cost Amount (Non-Invtbl.)	Cost Posted to G/L	Cost p
4/8/2024	Purchase	Direct Cost	☐	Purchase In...	108219	JB-FREIGHT	0	0	-10	0.00	0.00	0.00	-100.00	0.00	
4/8/2024	Sale	Direct Cost	☐	Sales Invoice	103218		-10	-10	-10	0.00	350.00	-200.00	0.00	-200.00	

Capability Guide. Charge Management. Details

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

Customer

Item 1008 Tires

Item Ledger Entries | Find entries... | Entry | Order Tracking | Application Worksheet | More options

Posting Date	Entry Type	Document Type	Document No.	Item No.	Location Code	Quantity	Invoiced Quantity	Remaining Quantity	Sales Amount (Actual)	Cost Amount (Actual)	Cost Amount (Non-Invtbl.)	Open	Entry No. ↑
4/8/2024	Purchase	Purchase Rec...	107232	1008	EAST	10	10	0	0.00	200.00	0.00	☐	710
4/8/2024	Sale	Sales Shipme...	102233	1008	EAST	-10	-10	0	500.00	-200.00	-100.00	☐	711

Item Ledger Entry 711

Value Entries | Find entries... | Entry | More options

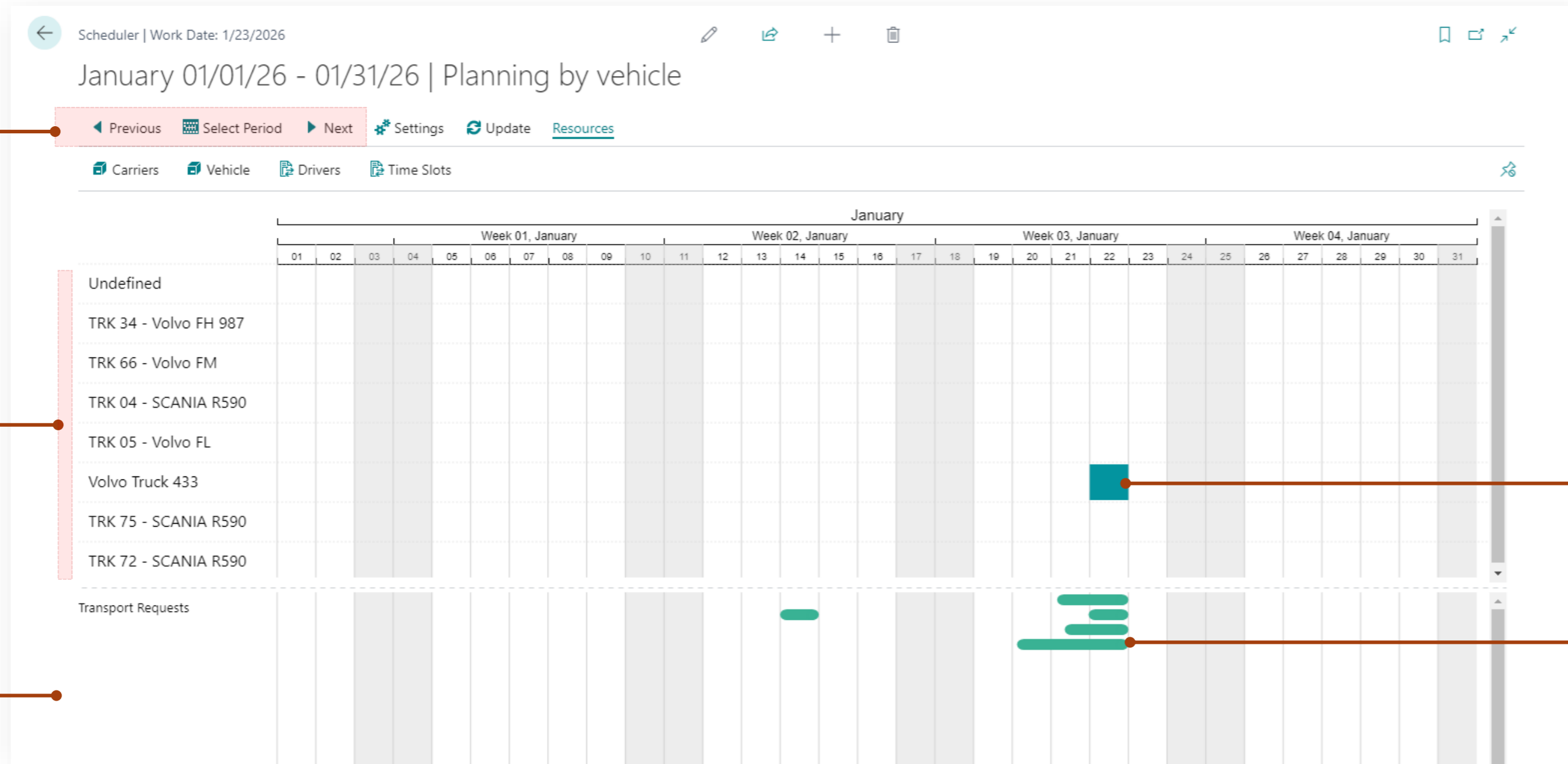| Posting Date	Item Ledger Entry Type	Entry Type	Adj...	Document Type	Document No.	Item Charge No.	Item Ledger Entry Quantity	Invoiced Quantity	Valued Quantity	Cost Amount (Expected)	Sales Amount (Actual)	Cost Amount (Actual)	Cost Amount (Non-Invtbl.)	Cost Posted to G/L	Cost p
4/8/2024	Sale	Direct Cost	☐	Sales Invoice	103219	JB-FREIGHT	0	0	-10	0.00	150.00	0.00	0.00	0.00	
4/8/2024	Purchase	Direct Cost	☐	Purchase In...	108219	JB-FREIGHT	0	0	-10	0.00	0.00	0.00	-100.00	0.00	
4/8/2024	Sale	Direct Cost	☐	Sales Invoice	103218		-10	-10	-10	0.00	350.00	-200.00	0.00	-200.00	

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 |

01 02 03 04 05 06 07 08 09 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31

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.

Driver (TMS) | Work Date: 1/23/2026

ED

Navigate

General

Show more

No.	ED	Full Name	
Name	Ed Korso	Fuel Card No.	

Carrier

Carrier No.	M9 LOGISTICS	Carrier Name	M9 Logistics

Defaults

Default Vehicle No.	TRUCK0432	Default Vehicle Name	Volvo Truck 433

Personal Information

Birth Date	1/5/1987	Medical Card Number	ZGN002456573
Employment Date	1/1/2024	Medical Card Expiration	10/29/2025

✓ Saved

ⓘ Details   📎 Attachments (0)

Picture ∨

Attachments ∨

File   Categ...

(There is nothing to show in this view)

Thank you

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