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# Transportation Management System Capability Guide

## for Shippers



# Capability Guide. Shipper Scenario

For shippers that manage transportation for sales, purchase, and transfer orders using their own fleet, hired vehicles, and 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



## Documents

### Transport Request

is a transportation request created from internal company documents such as sales orders, purchase orders, or transfer orders. It defines WHAT needs to be moved, where the goods are picked up, and where they must be delivered, together with 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.

### Transport Order

is the execution document that defines HOW the transportation will be carried out. It specifies the carrier, driver, vehicle, route, and stop sequence. The Transport Order represents the actual truck run and can combine multiple Transport Requests into one route.

**What will be transported?**

**How will it be transported?**

# Capability Guide



The simplest way to start transportation planning is to select one or more source documents and run Create Transport Request or Create Transport Order, depending on the objective. Released requests can also be grouped later in Visual Scheduler or Load Management.

*Note: some screenshots in this deck still use the legacy label "Delivery Order". In the current version, the document is named "Transport Order".*

The screenshot shows a software interface for managing sales orders. At the top, there is a navigation bar with 'CRONUS UK Ltd.' and various menu items like 'Finance', 'Cash Management', 'Sales', 'Purchasing', 'TMS', 'Shopify', and 'All Reports'. Below this is a toolbar with 'Sales Orders: All' and various action buttons like '+ New', 'Delete', 'Home', 'Release', 'Post...', 'Print/Send', 'Order', 'TMS', and 'Actions'. The main area is a table of sales orders. A context menu is open over the row with ID 101011, showing three options: 'Create Transport Request', 'Create Delivery Order', and 'Update Transportation Status'. The table columns include 'No.', 'Sell-to Customer No.', 'Sell-to Customer Name', 'External Document No.', 'Location Code', 'Assigned ID', 'Geographic Zone Code', 'Route No.', 'Transportation Status', 'Transportation Documents', and 'For On'.

No. ↑	Sell-to Customer No.	Sell-to Customer Name	External Document No.	Location Code	Assigned ID	Geographic Zone Code	Route No.	Transportation Status	Transportation Documents	For On
<input type="radio"/>	101005	30000	John Haddock Insurance Co.							
<input type="radio"/>	101009	38128456	MEMA Ljubljana d.o.o.	RED			1/16/2026	Released		
<input checked="" type="radio"/>	101011	43687129	Designstudio Gmunden	RED			1/9/2026	Released		
<input checked="" type="radio"/>	101013	46897889	Englunds Kontorsmöbler AB	YELLOW			1/15/2026	Released		
<input checked="" type="radio"/>	101015	49633663	Autohaus Mielberg KG	GREEN			1/18/2026	Released		
<input type="radio"/>	101016	10000	The Cannon Group PLC	BLUE			1/22/2026	Released		
<input type="radio"/>	101017	20000	Selangorian Ltd.				1/23/2026	Open		
<input type="radio"/>	101018	01454545	New Concepts Furniture	YELLOW			1/23/2026	Open		
<input type="radio"/>	101019	31987987	Candoxy Nederland BV	YELLOW			1/19/2026	Released		
<input type="radio"/>	101020	32789456	Lovaina Contractors	YELLOW			1/23/2026	Open		
<input type="radio"/>	101022	38128456	MEMA Ljubljana d.o.o.	RED			2/1/2026	Open		
<input type="radio"/>	101023	30000	John Haddock Insurance Co.				2/18/2026	Open		
<input type="radio"/>	1011	01121212	Spotsmeyer's Furnishings	YELLOW			1/22/2026	Released		

# Capability Guide



From any source-document list, the Transportation Status and Transportation Documents fields show whether the document has been sent to TMS, whether a Transport Request or Transport Order exists, and whether this applies to the whole document or only selected lines.

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

Transportation Management System

Transport Request



# Capability Guide. Transport Request

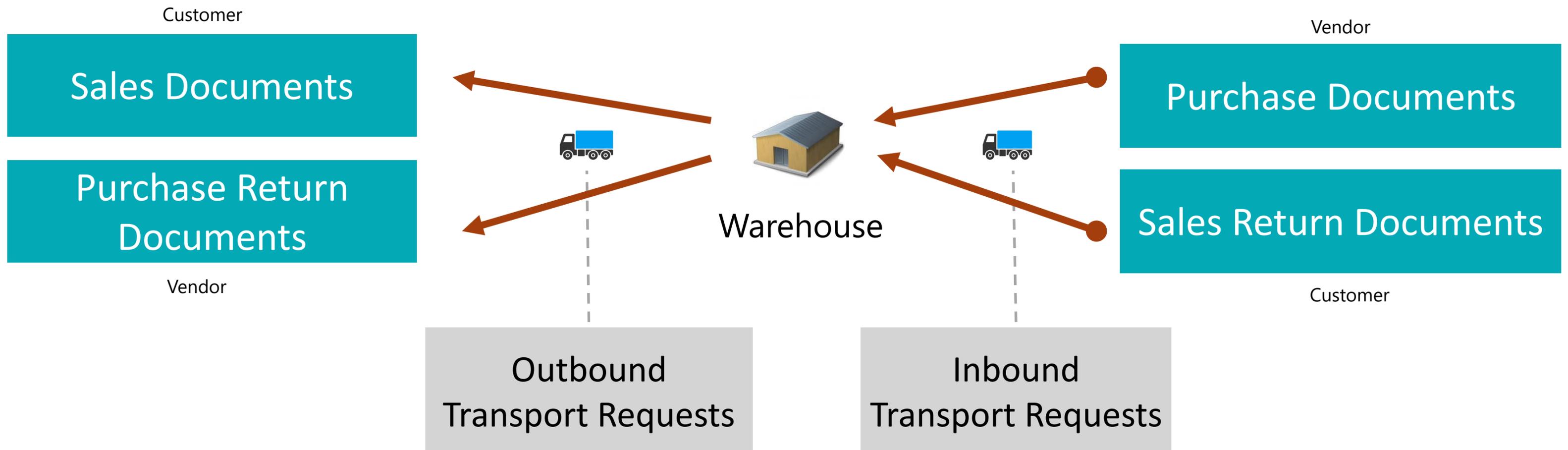
The Transport Request document covers the following functional areas of the TMS.

- ✔ **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

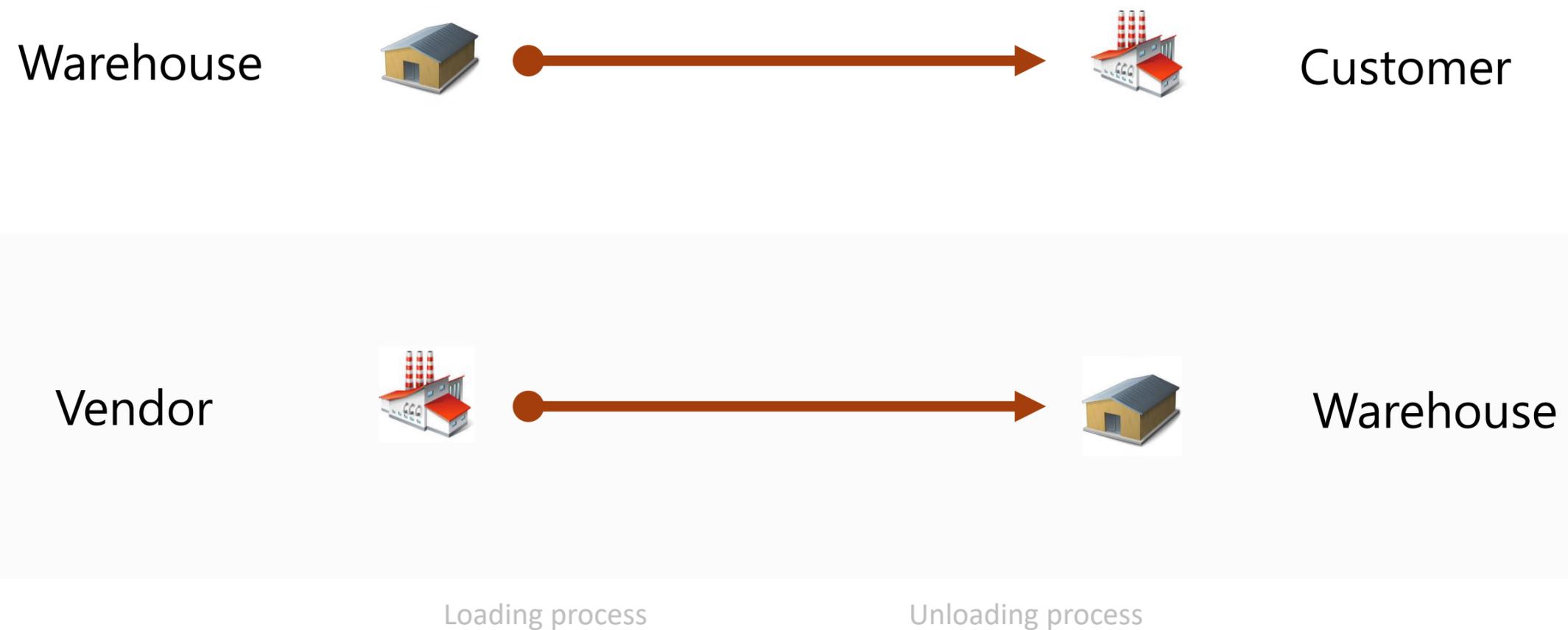
To move goods from one place to another in TMS, start with a Transport Request. It can be created from sales, purchase, or transfer documents, including posted documents. A Transport Request defines what must move, from where, to where, and by when.





# Capability Guide. Transport Request

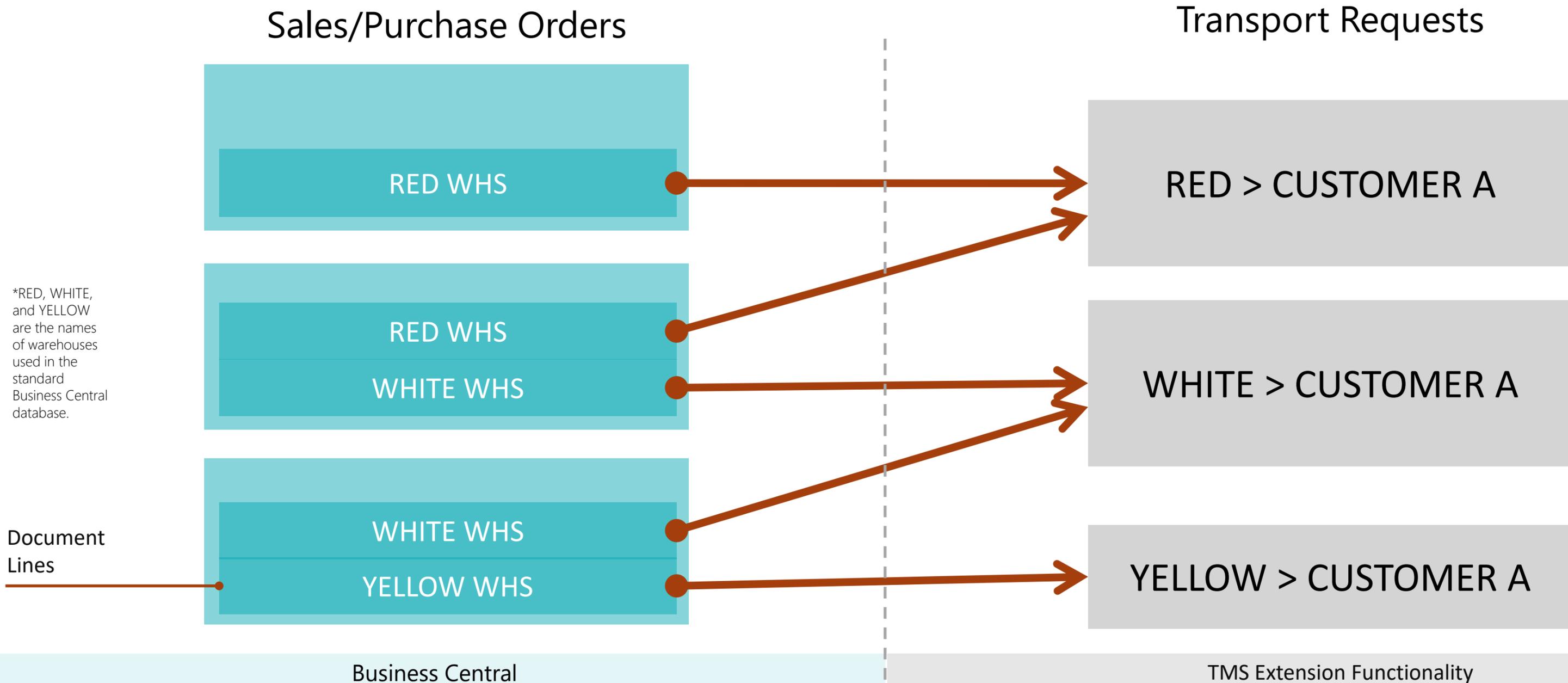
Transport Request is the planning document used to initiate transportation from one point to another. It can include lines from multiple source documents, but it groups them by a simple A-to-B movement. It does not describe a full truck route or multiple operational stops; that execution logic is handled later in the Transport Order.



# Capability Guide. Transport Request



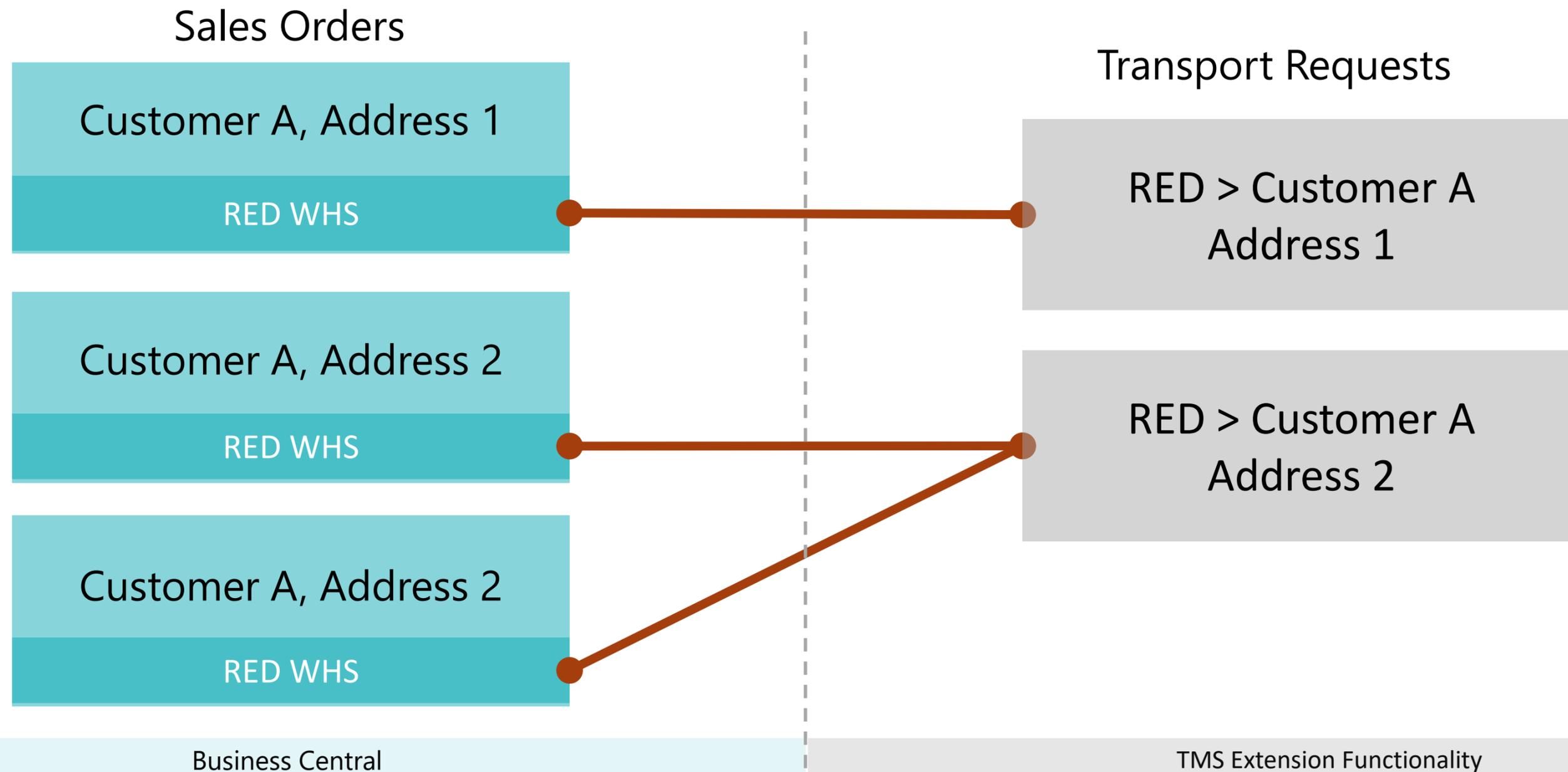
The Transport Request allows grouping source documents based on the warehouse from which goods will be shipped or received. The connection is made at the line level, as in Business Central, different lines within the same document can be associated with different warehouses.



# 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.





# 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

TR149

Home Get Source Documents Delivery

Release Show Route Transport Time & Distance

**General** Show more

Route No.	<input type="text"/>	Transportation Distance (km)	<input type="text" value="0.00"/>
Status	Released	Transportation Duration	<input type="text"/>

<b>Shipper</b>	<b>Consignee</b>
Shipper Type: Location	Consignee Type: Customer
Shipper Name: CRONUS UK, Ltd.	Consignee Name: Zanlan Corp.
Load Address Code: YELLOW	Unload Address Code: <input type="text"/>
Load Address: Main Bristol Street, 10	Unload Address: <input type="text"/>
Load Address, City: Bristol	Unload Address, City: <input type="text"/>

# Capability Guide. Transport Request



The Transport Request uses MAP Location data matched to warehouses, vendors, customers, or their addresses to visualize the transportation route. This improves clarity and helps make route planning more accurate.

The screenshot displays a software interface for managing a transport request. On the left, a sidebar shows the request details for 'TR151' with a 'Show Route' button highlighted. The main area features a Google Map with a blue route connecting Liverpool, UK (marked 'A') to Hamburg, Germany (marked 'B'). The map includes labels for various countries and cities. On the right, a panel shows a 'Show more' button and a table with a value of '100.00' and other data fields.

Transport Request | Work Date: 1/23/2026

TR151

Home Get Source Documents De

Release Show Route

General

Route No. ....

Status .....

Shipper

Shipper Type .....

Shipper Name .....

Load Address Code .....

Load Address .....

Load Address, City .....

Google Map | Work Date: 1/23/2026

GB, Liverpool, L18 6SA, Main Liverpool Street, 5

Find Address On Map Save

Map Satellite

United Kingdom

Denmark

Isle of Man

Netherlands

Germany

Belgium

Luxembourg

100.00

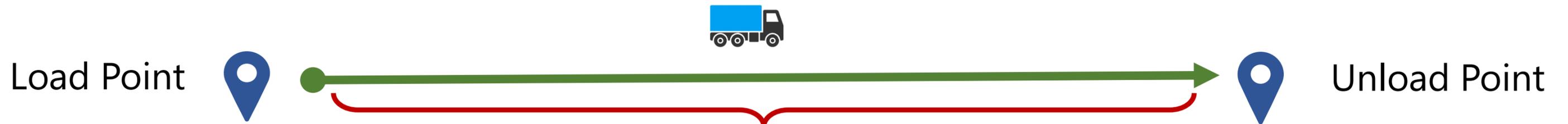
Show more

ielberg KG



# 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.



Transport Request | Work Date: 1/23/2026

TR149

Home Get Source Documents Delivery

Release Show Route **Transport Time & Distance**

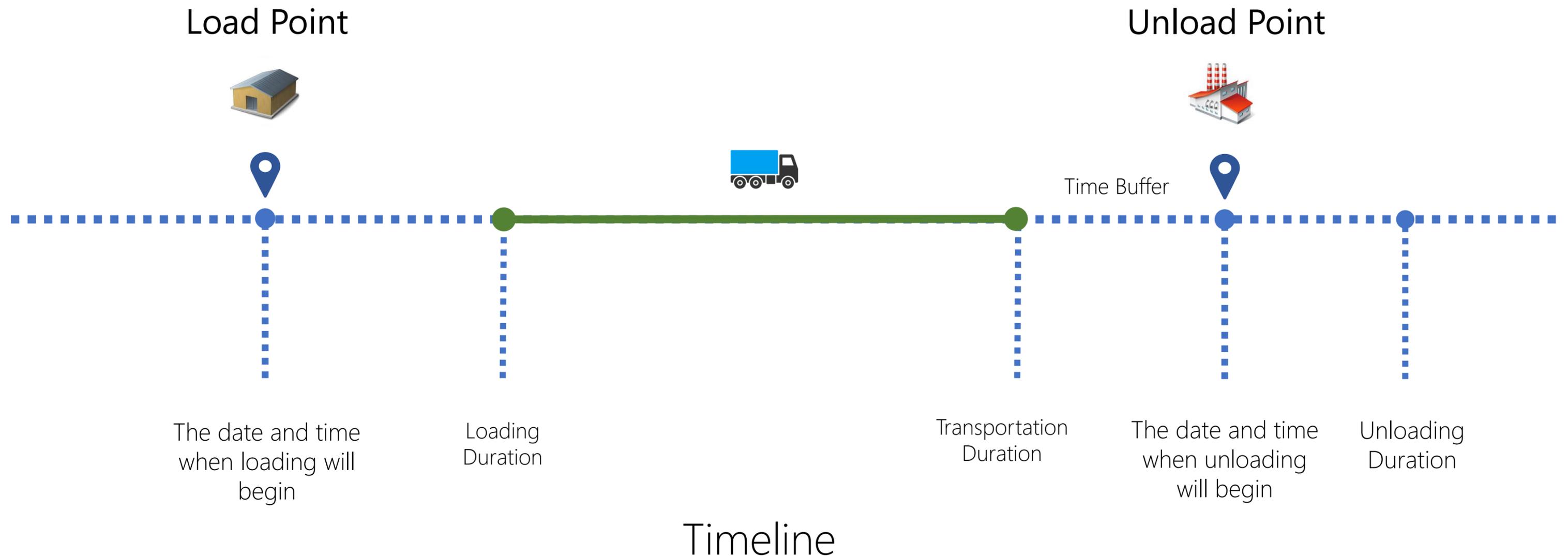
**General** Show more

Route No.	<input type="text"/>	Transportation Distance (km)	0.00
Status	Released	Transportation Duration	<input type="text"/>
<b>Shipper</b>		<b>Consignee</b>	
Shipper Type	Location	Consignee Type	Customer
Shipper Name	CRONUS UK, Ltd.	Consignee Name	Zanlan Corp.
Load Address Code	YELLOW	Unload Address Code	<input type="text"/>
Load Address	Main Bristol Street, 10	Unload Address	<input type="text"/>
Load Address, City	Bristol	Unload Address, City	<input type="text"/>

# Capability Guide. Transport Request



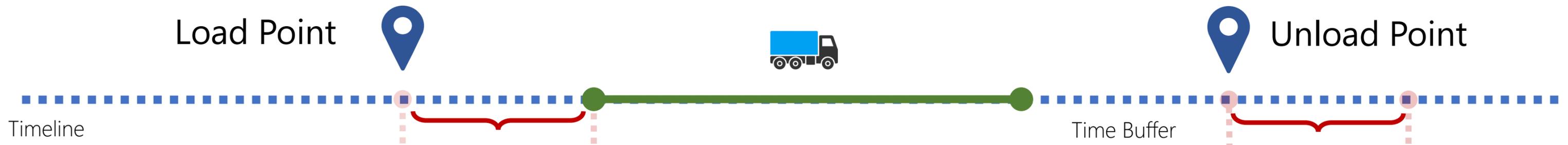
The Transport Request lets you specify the required parameters precisely: location, date, time, and the duration of key transportation stages. Travel duration can be estimated using the Google Maps API.



# 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.



Transport Request | Work Date: 1/23/2026

TR151

Home Get Source Documents Delivery

Release | Show Route Transport Time & Distance

Planning Show less

Load	Unload
Load Date And Time	Unload Date And Time
10/18/2026 12:00 AM	10/19/2026 12:00 AM
Load Duration	Unload Duration
4 hours	7 hours
Load Priority	Unload Priority
	4
Loading Bay	Unloading Bay
GATE 5	GATE A
Loading Comment	Unloading Comment
Check in at the front gate upon arrival. Wait for further instructions from the warehouse staff.	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 lets you adjust the quantity for the current transportation, which supports split deliveries from one source document. If the goods are packed into logistic units, that information is shown as well.

Source Document Lines.

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

Source Document Logistic Units.

Transportation Management System

Transport Order



# Capability Guide. Transport Order

The Transport 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. Transport Order

A Transport Order is:

- a real vehicle run,  
the actual driving route with the stop sequence,  
a set of operational tasks such as loading, unloading, or pallet pickup,  
a loading sequence for the truck,  
a tool for controlling weight, volume, footage, and logistic-unit limits at each stop

# Capability Guide. Transport Order



## Elements

Specifies **who** is responsible for executing this transportation.

**Route Stops:** the stop points along the route. Each Transport Request usually contributes a pickup stop and a drop-off stop.

Delivery Order | Work Date: 1/23/2026

D0011

Home Get Documents Route Optimization

Release Post Delivery Refresh Lines

### General

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

Sequence	Waypoint No.	Waypoint Description	Scheduled Date and Time	Han... Time	Action Code	Description	Transportation Duration	Time Buffer	V
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

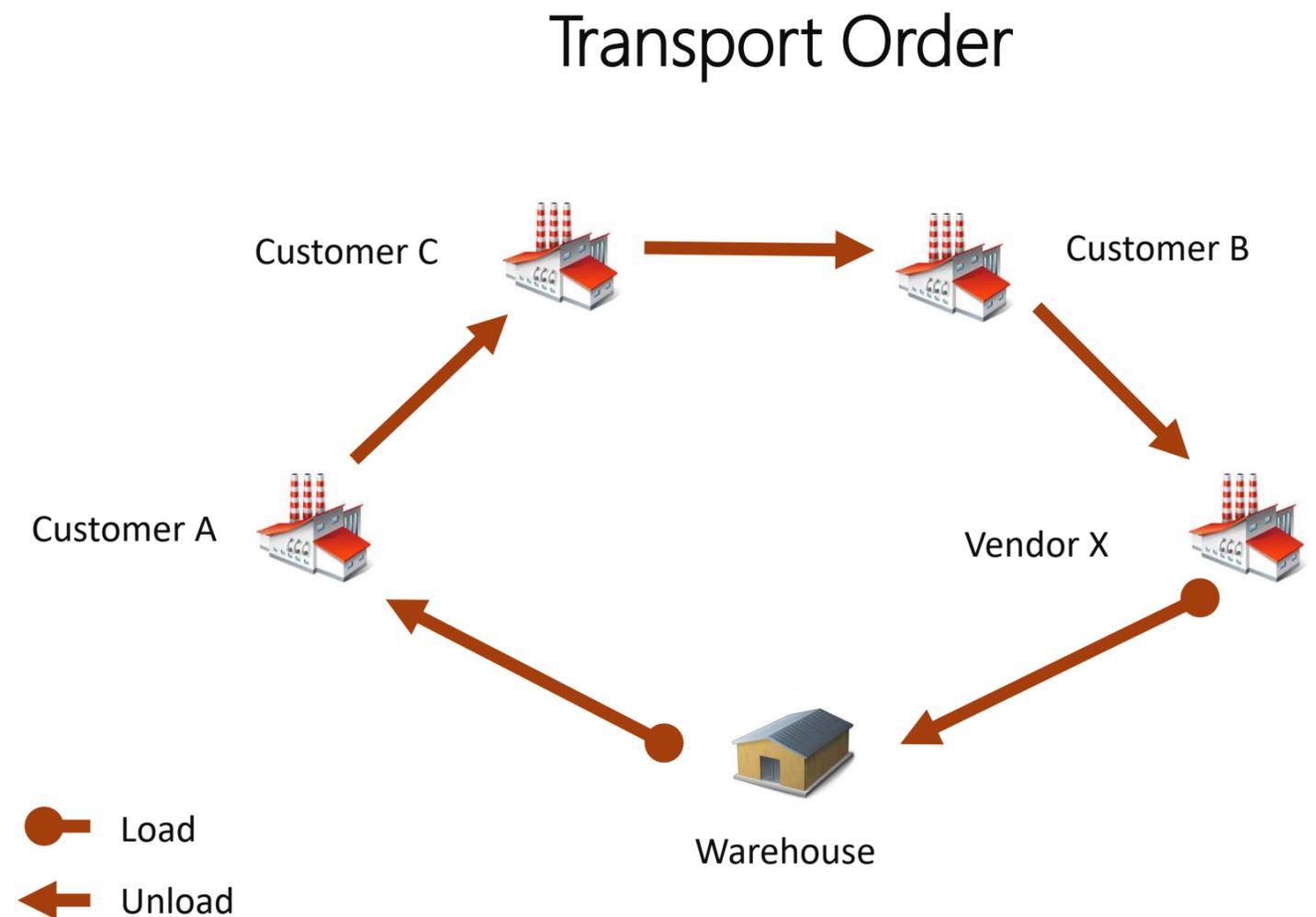
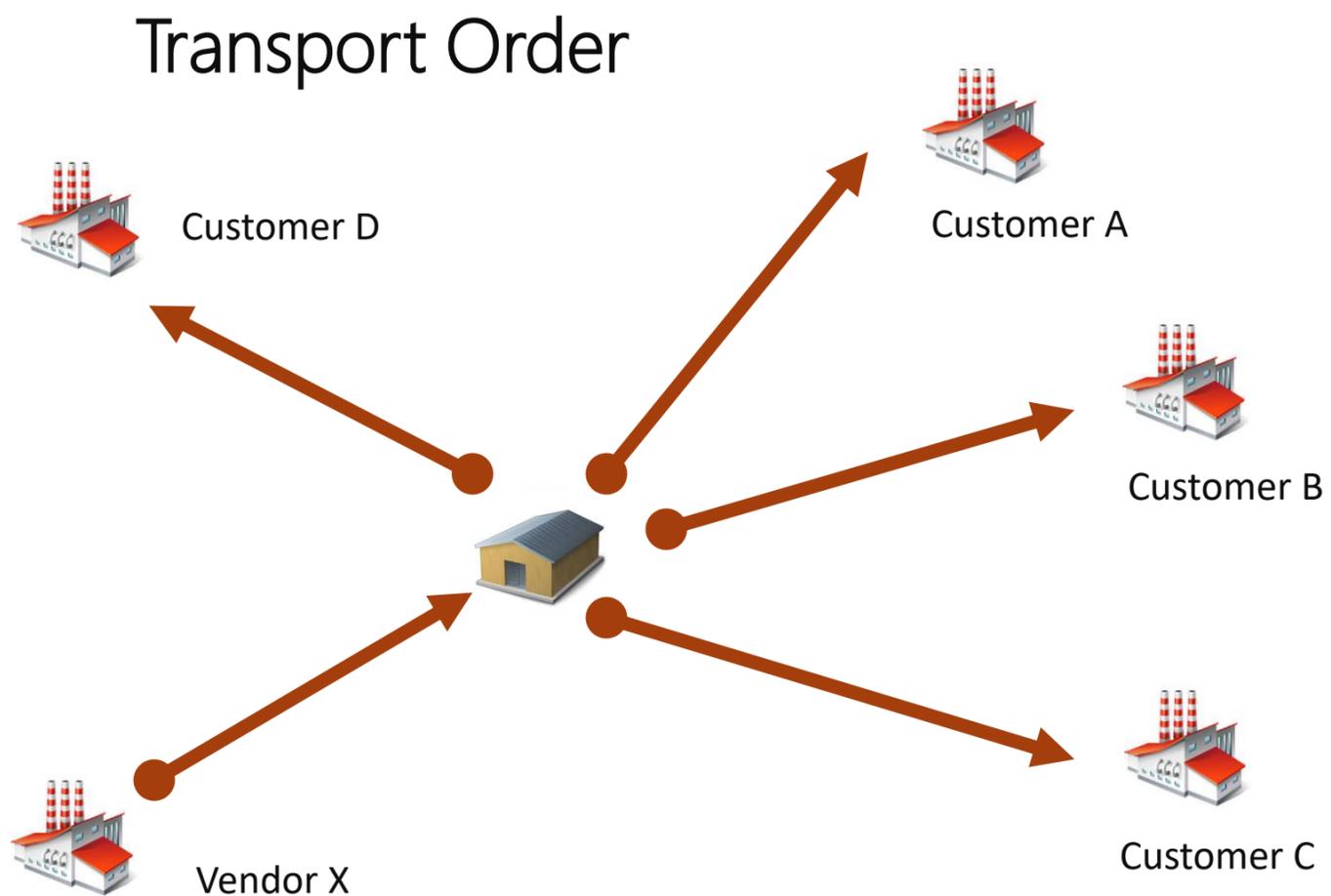
**Vehicle limits** based on weight, volume, footage, or logistic units. Strict weight control can be enforced if needed.

The planned **date and time** when the truck is expected at this location.



# Capability Guide. Transport Order

Transport Order consolidates multiple Transport Requests into a single truck run, taking weight and volume limits into account while allowing route optimization by distance or duration.

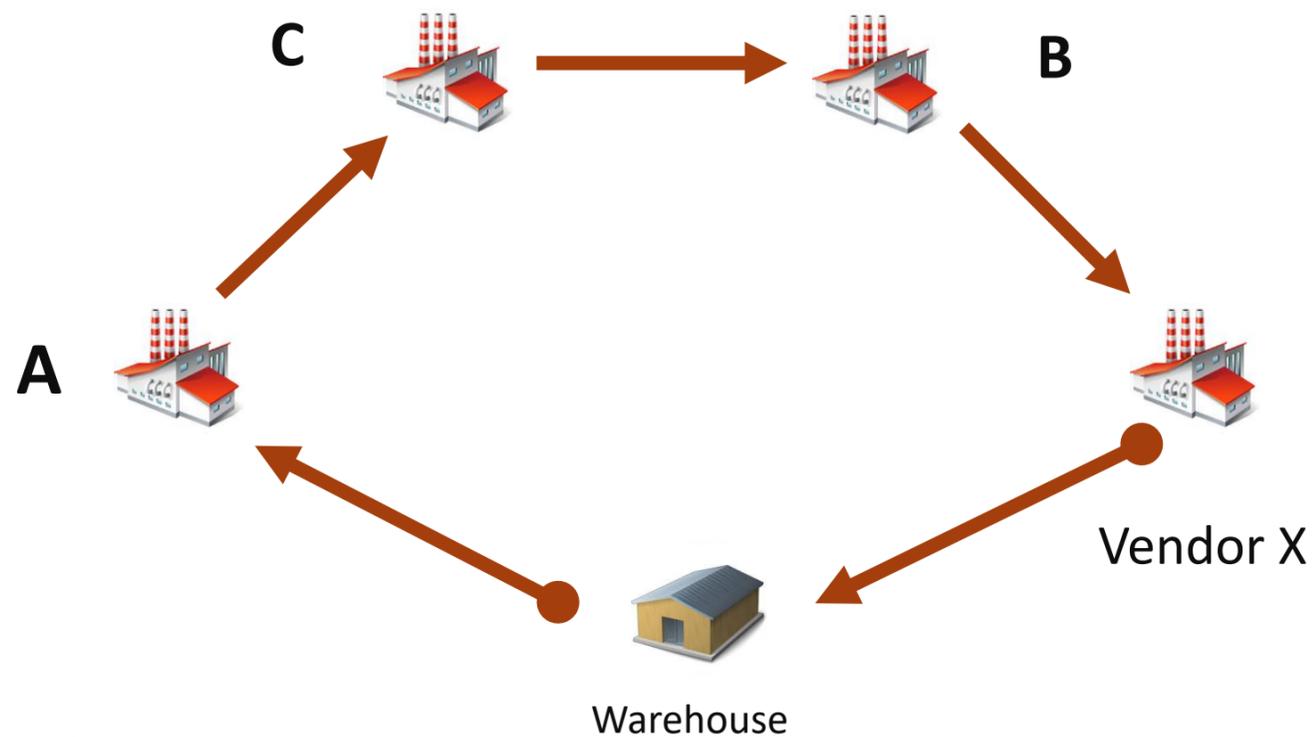




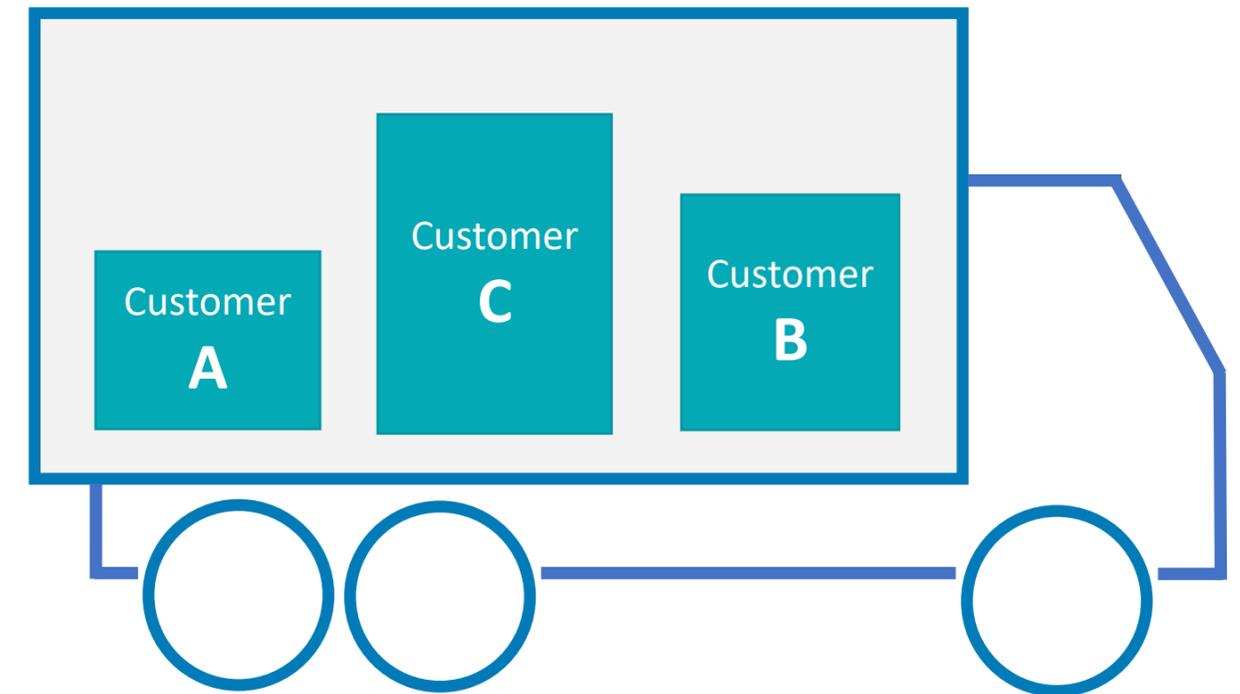
# Capability Guide. Transport Order

Transport Order can automatically determine the warehouse loading sequence based on the order of delivery stops along the route.

### Transport Order



### Load Sequence



- Load
- ← Unload



# Capability Guide. Transport Order

The Transport Order also allows you to manually set the 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.

Delivery Order | Work Date: 1/23/2026

D0020

Home Get Documents Route Optimization

Show Route Get Transport Time & Distance

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

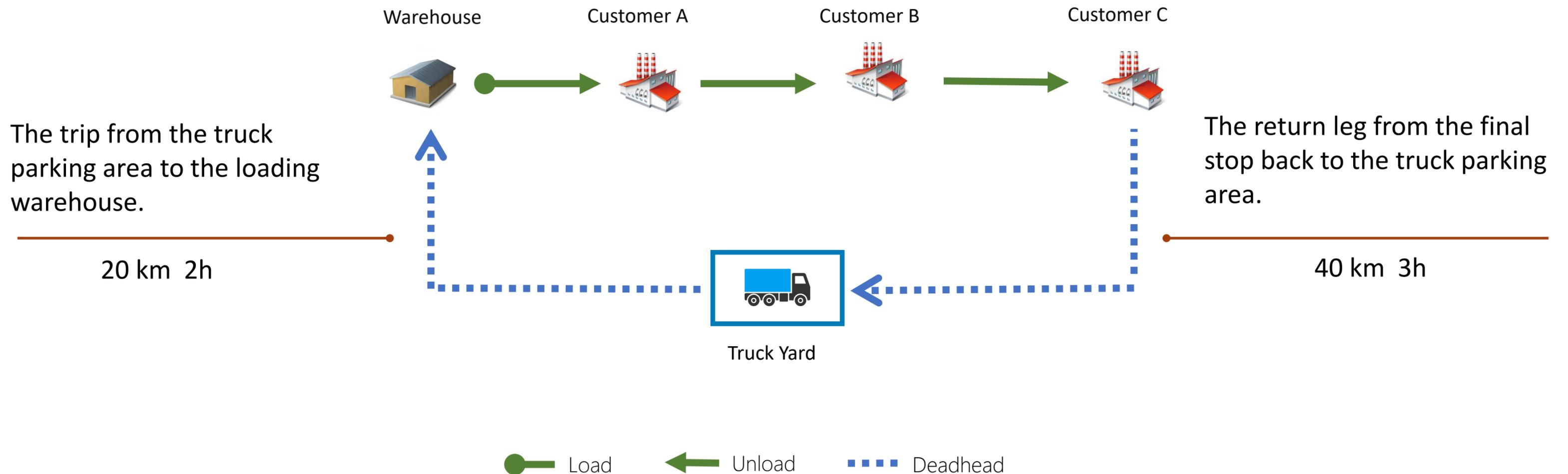
Totals

Total Distance ..... 1,335.40 Total Duration ..... 20 hours 54 minutes



# Capability Guide. Transport Order

Transport Order can also include additional route elements such as the trip from the truck yard or depot to the warehouse and the return leg after the final stop. These legs are important for driver-hours control and fleet planning.

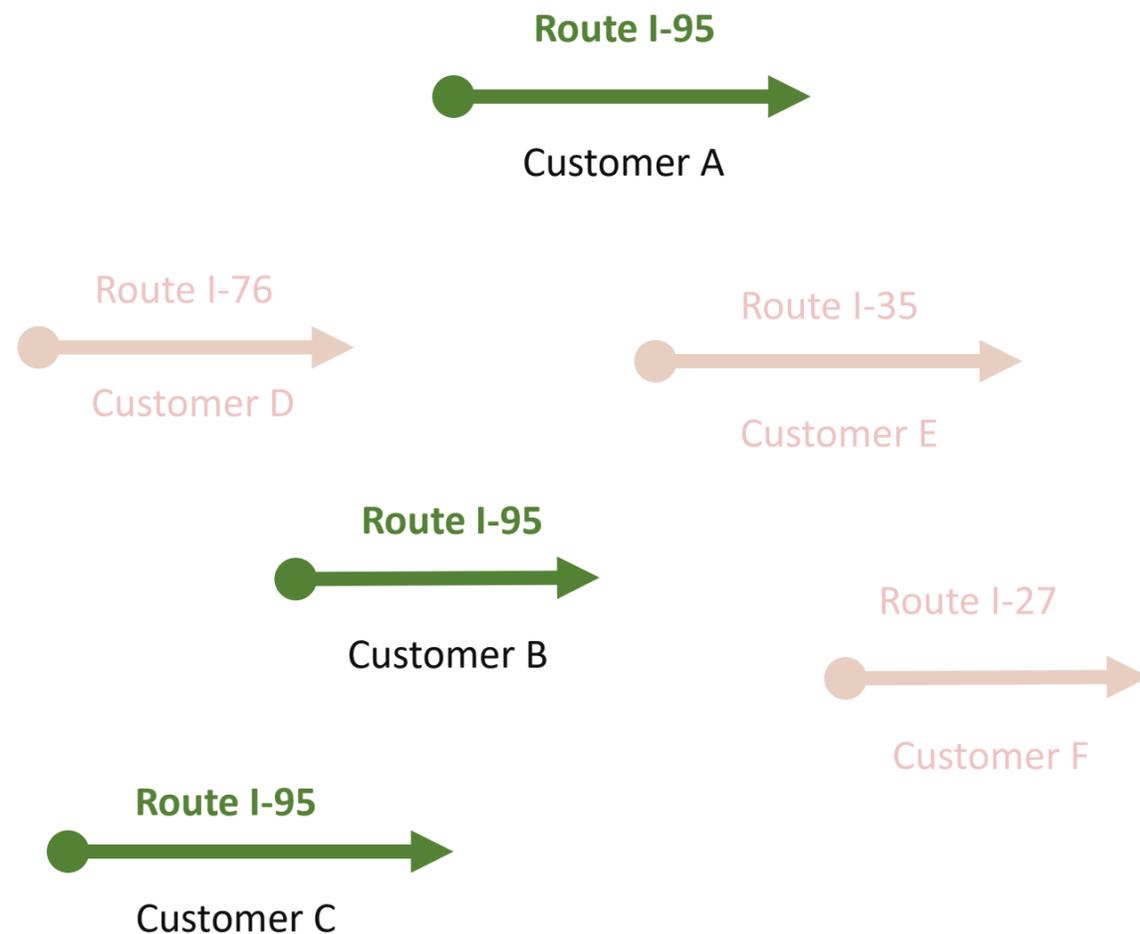




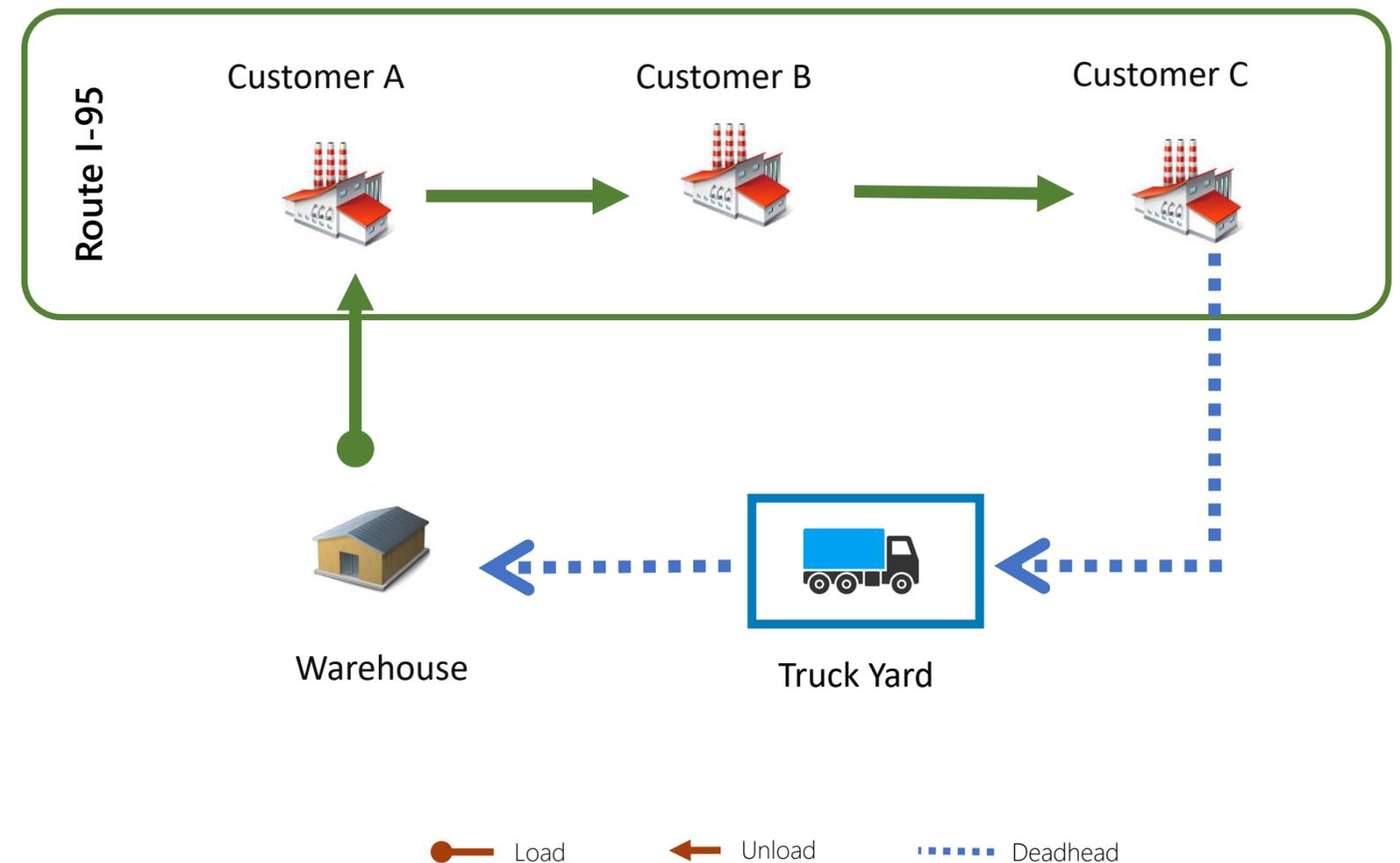
# Capability Guide. Transport Order

Transport Order also supports the selection of Transport Requests by route number. Each customer or delivery address can be assigned a route number, which helps planners build recurring routes faster.

## Transport Requests



## Transport Order



# Capability Guide. Transport Order



Integration with Google Maps helps construct the optimal transport route between MAP Locations, with optimization by distance or duration.

← Delivery Order | Work Date: 1/23/2026

D0020

Home Get Documents Route Optimization

Route Optimization Loads Optimization

---

**General**

Route No.

Carrier Name

Vehicle Name

Driver Name

Status

← Google Map

CA, Longueuil, CA-QC J4L 4K5, 3315 Chem. de Chambly

Geocoding... Save...

Map Satellite

Map data ©2024 Google

✓ Saved

Show more

20FRC

0' Flat Rack container

27,030.00

33.12



# Capability Guide. Transport Order

The system checks the loading and unloading schedule for the entire route, taking travel time into account, and warns you when a planned stop cannot be reached on time.



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

Delivery Order | Work Date: 1/23/2026

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

✓ Saved

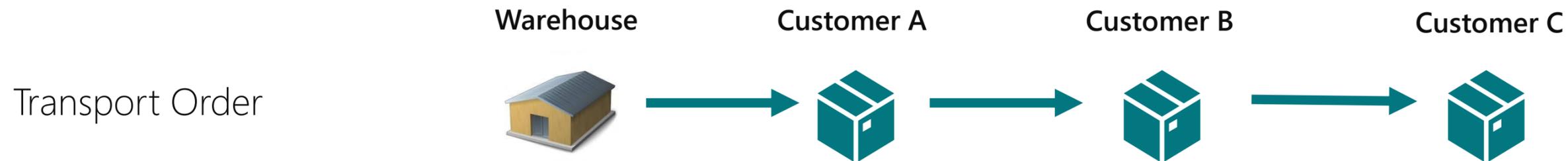
Transportation Management System

# Charge Management



# Capability Guide. Charge Management

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



The Transport Order contains the information needed to allocate costs across transported orders in one place and helps calculate delivery costs more accurately.



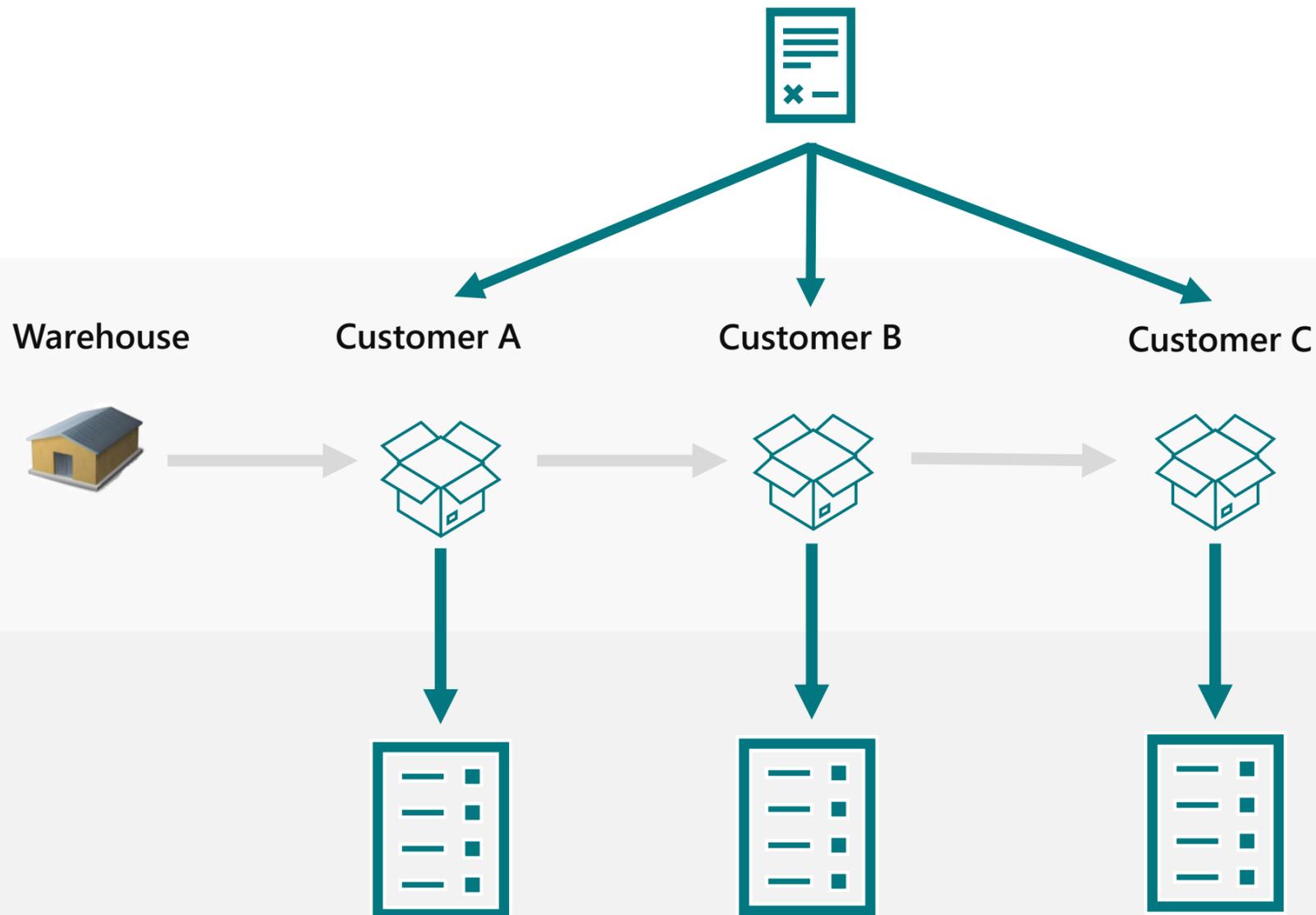
# Capability Guide. Charge Management

TMS supports two levels of charge allocation: first between transported orders, and then from those orders down to the item lines.

Carrier Freight Invoice



Warehouse  
Transport Order



- 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 main documents are: Purchase Invoice for carrier costs, Sales Invoice for billing the customer, Transport Order for controlling and allocating shipment costs, and Item Charges as the accounting object used by these documents.

The screenshot displays three overlapping SAP TMS Charge Management screens:

- Delivery Order (DLV028):** Shows a navigation menu with 'Home', 'Get Documents', 'Route', 'Optimization', 'Print', and 'More options'. Below the menu are buttons for 'Release', 'Post', and 'Refresh Lines'. The 'General' section includes fields for Route No. (EAST), Carrier Name (Subcontractor), Vehicle Name, Driver Name, and Status (Open).
- Purchase Invoice (107223 · Subcontractor):** Shows a navigation menu with 'Home', 'Prepare', 'Request Approval', 'Invoice', 'TMS', and 'More options'. Below the menu are buttons for 'Post' and 'Release'.
- Item Charges:** A table listing various charge types with columns for No., Description, Gen. Prod. Posting Group, VAT Prod. Posting Group, Search Description, and Freight. The table includes:

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



# 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**.

**General**

Vendor Name: Subcontractor  
VAT Date: 4/8/2024  
Contact:   
Due Date: 4/8/2024  
Document Date: 4/8/2024  
Vendor Invoice No.: A454-987  
Posting Date: 4/8/2024  
Status: Open

**Lines**

Type	No.	Description/Comment	Location Code	Quantity	Unit of Measure Code	Direct Unit Cost Excl. VAT	Line Amount Excl. VAT	Qty. to Assign	Qty. Assigned	Department Code	Customergroup Code
→ Charge (Item)	JB-FREIGHT	Freight Charge (JB-Spedition)		1		200.00	200.00	0			

No. ↑	Description	Gen. Prod. Posting Group	VAT Prod. Posting Group
→ JB-FREIGHT	Freight Charge (JB-Spedition)	SERVICES	STANDARD
P-ALLOWA...	Purchase Allowance	SERVICES	STANDARD
P-FREIGHT	Misc. Freight Charge (Purch.)	SERVICES	STANDARD
P-RESTOCK	Purchase Restock Charge	SERVICES	STANDARD
S-ALLOWA...	Sales Allowance	SERVICES	STANDARD

Subtotal Excl. VAT (GBP) ... 200.00  
Total Excl. VAT (GBP) ... 200.00  
Inv. Discount Amount (GBP) ... 0.00  
Total VAT (GBP) ... 40.00

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 Transport Order. In the Charges section of the Transport Order, select the invoice line or lines to allocate to the selected shipment.

Delivery Order  
DLV031

Home Get Documents Route Optimization Print More options

Release Post Refresh Lines

Route Stops and Actions New Line

Sequence	Waypoint No.	Waypoint Description
10	M0000049	Nod Publishers
20	A-CVI	CVI - Certificate
30	M0000033	Trey Research

Totals

Total Distance

Charges Manage Assignment Functions

Purchase Invoice Assignment

Type Charge No. Description

Purchases JB-FREIGHT Freight C

Purchase Item Charge Selection

Document No.	Currency Code	Vendor Invoice No.	Type	No.	Description
107217	:	565	Charge (Ite... P-FREIGHT		Misc. Freight Charge (Purch)
107218	:	654545	Charge (Ite... JB-FREIGHT		Freight Charge (JB-Expedition)

Weight Volume Transportation Distance

0.00	0.00	0.00
0.00	0.00	0.00
0.00	0.00	0.00

Assigned Amount Source Document Assigned Amount to Source Line

200.00	Purchase Invoice	-
--------	------------------	---

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

Menu Item



# Capability Guide. Charge Management. How it works

Allocate costs across transported orders. In the Charges section of the Transport Order, click Assignment to open a window where you can allocate costs automatically by selected parameters or manually.

**Delivery Order**  
DLV019

**Delivery Charges Assignment**

Assign charge amount by distance

Shipper Name	Consignee Name	Distance	Weight	Volume	Footage	No. of Logistic Units	Amount to Assign	Transport Request No.	Transport Request Lines
CRONUS UK Ltd.	Coca Cola Ltd	40.48	351.75	0.00	0.00	0	<b>112.81</b>	TR063	2
CRONUS UK Ltd.	Village des Valeurs	34.40	516.64	0.00	0.00	0	<b>95.86</b>	TR064	2
CRONUS UK Ltd.	IGA Ltd	27.29	205.11	0.00	0.00	0	<b>76.05</b>	TR065	2
→ CRONUS UK Ltd.	CDE Stores Ltd	77.25	218.05	0.00	0.00	0	<b>215.28</b>	TR066	2

Charge	To Assign	Assigned	Rem. to Assign
Freight Charge (JB-Spedition)	500.00	500.00	0.00

**Charge Assignment**

Type	Charge No.	Description	Customer/Vendor Name	Quantity	Price	Amount	Assigned Amount	Source Document	Assigned Amount to Source Line
------	------------	-------------	----------------------	----------	-------	--------	-----------------	-----------------	--------------------------------



# Capability Guide. Charge Management. How it works

Apply the allocated charges from the orders to the item lines within those orders.

Delivery Charges Assignment ✓ Saved

Suggest Charge Assignment [Apply](#) Update | More options

[Apply](#) Show Item Charge Assignment

### Item Charge Assignment (Purch) - JB-FREIGHT Freight Charge (JB-Spedition)

Manage [Suggest Item Charge Assignment...](#) [Get Receipt Lines](#) [Get Sales Shipment Lines](#) [Get Transfer Receipt Lines](#) [Get Return Receipt Lines](#) [Get Return Shipment Lines](#)

Applies-to Doc. Type	Applies-to Doc. No.	Applies-to Doc. Line No.	Item No.	Description	Qty. to Assign	Qty. to Handle	Qty. Assigned	Amount to Assign	Amount to Handle	Gross Weight	Unit Volume
→ Sales Ship...	102226	10000	1896-S	ATHENS Desk	0.03333	0.03333		33.33	33.33	39.79	1.2
Sales Ship...	102226	20000	1900-S	PARIS Guest Chair, black	0.03334	0.03334		33.34	33.34	9.55	0.25
Sales Ship...	102226	30000	1908-S	LONDON Swivel Chair, blue	0.03333	0.03333		33.33	33.33	15.99	0.25
Sales Ship...	102227	10000	1896-S	ATHENS Desk	0.3	0.3		300.00	300.00	39.79	1.2
Sales Ship...	102227	20000	1900-S	PARIS Guest Chair, black	0.3	0.3		300.00	300.00	9.55	0.25
Sales Ship...	102227	30000	1928-S	Red Swivel Lamp	0.3	0.3		300.00	300.00	4.03	0.03

	Assignable	To Assign	Rem. to Assign	To Handle	Rem. to Handle
Total (Qty.)	1	1	0	1	0
Total (Amount)	1,000.00	1,000.00	0.00	1,000.00	0.00

Transport Request Lines

2
2
2
2

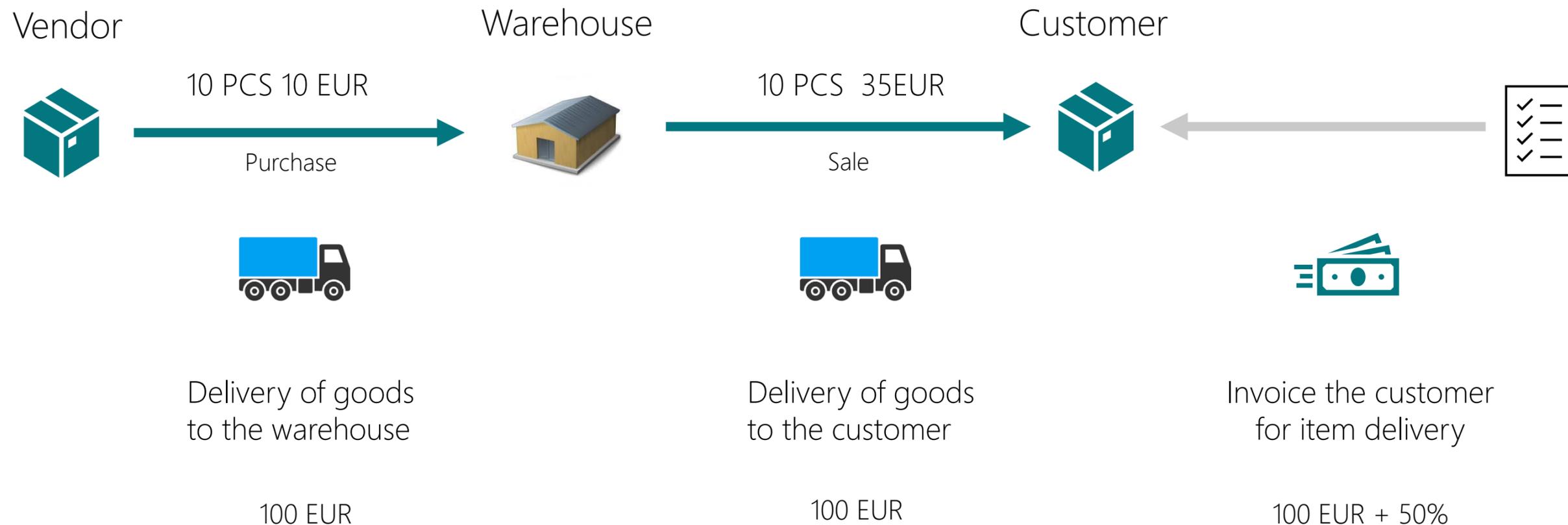
Item Lines of the Sales Order #1

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.





# 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.



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	<input checked="" type="checkbox"/>	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	<input type="checkbox"/>	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

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	<input checked="" type="checkbox"/>	710

Item Ledger Entry 710

Value Entries

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	<input type="checkbox"/>	Purchase In...	108218	JB-FREIGHT	0	0	10	0.00	0.00	100.00	0.00	100.00	
4/8/2024	Purchase	Direct Cost	<input type="checkbox"/>	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.



Item 1008 Tires

Item Ledger Entries | Find entries... | 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	<input type="checkbox"/>	710
4/8/2024	Sale	Sales Shipme...	102233	1008	EAST	-10	-10	0	350.00	-200.00	0.00	<input type="checkbox"/>	711

Item Ledger Entry 711

Value Entries | Find entries... | 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	<input type="checkbox"/>	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	<input type="checkbox"/>	710
4/8/2024	Sale	Sales Shipme...	102233	.1008	EAST	-10	-10	0	350.00	-200.00	-100.00	<input type="checkbox"/>	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	<input type="checkbox"/>	Purchase In...	108219	JB-FREIGHT	0	0	-10	0.00	0.00	0.00	-100.00	0.00	
4/8/2024	Sale	Direct Cost	<input type="checkbox"/>	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.



Item 1008 Tires

Item Ledger Entries

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	<input type="checkbox"/>	710
4/8/2024	Sale	Sales Shipme...	102233	1008	EAST	-10	-10	0	500.00	-200.00	-100.00	<input type="checkbox"/>	711

Item Ledger Entry 711

Value Entries

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	<input type="checkbox"/>	Sales Invoice	103219	JB-FREIGHT	0	0	-10	0.00	150.00	0.00	0.00	0.00	
4/8/2024	Purchase	Direct Cost	<input type="checkbox"/>	Purchase In...	108219	JB-FREIGHT	0	0	-10	0.00	0.00	0.00	-100.00	0.00	
4/8/2024	Sale	Direct Cost	<input type="checkbox"/>	Sales Invoice	103218		-10	-10	-10	0.00	350.00	-200.00	0.00	-200.00	

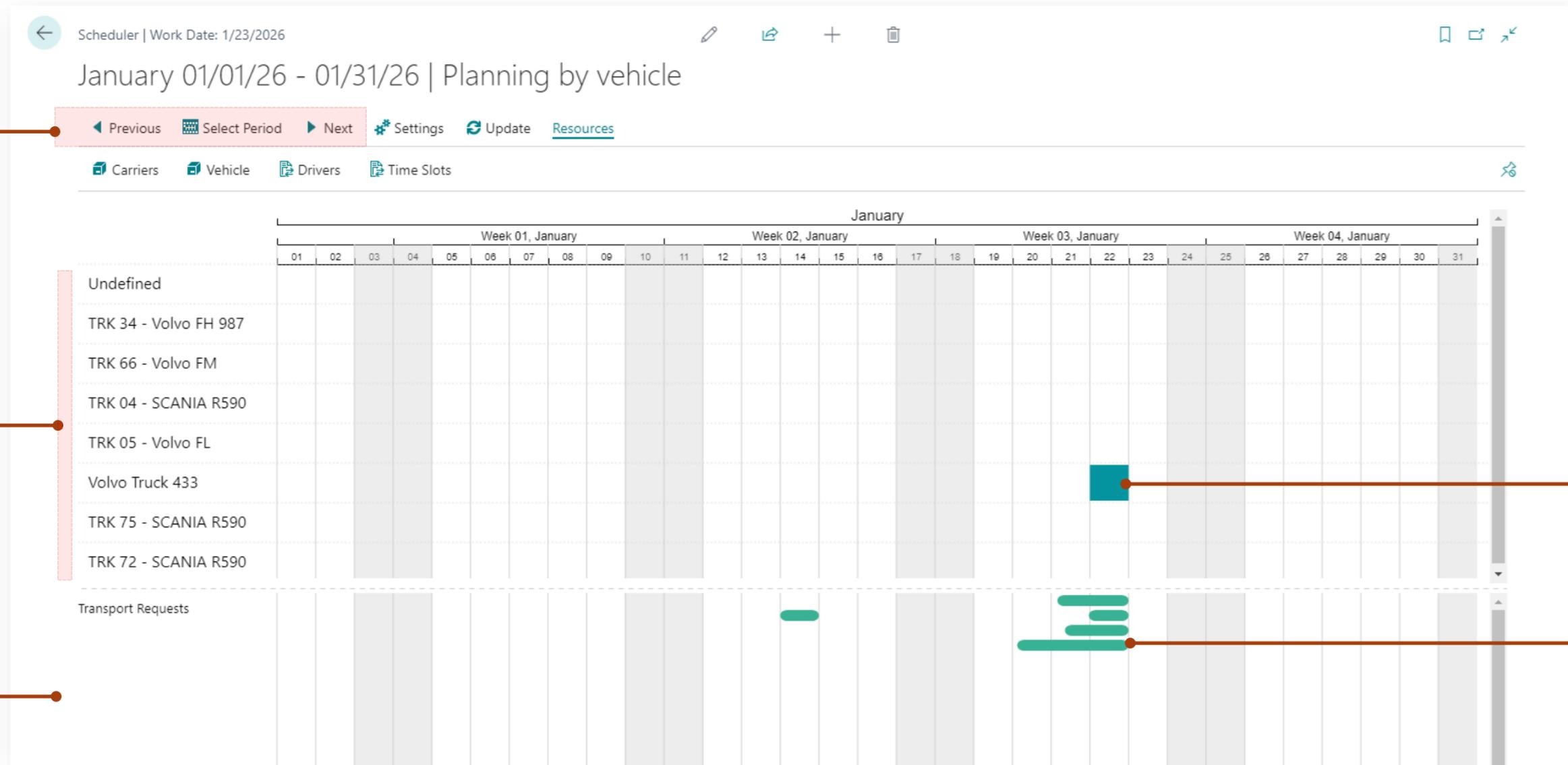
Transportation Management System

Visual Scheduler



# Capability Guide. Visual Scheduler

Visual Scheduler helps planners allocate Transport Requests and Transport Orders across available carriers, vehicles, and drivers. In the current version, detailed assignment can also be done in Load Management.



Planning Period Control

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

Transport Request list

Transport Order assigned to Volvo 433 truck

Transport request on a specific day



# Capability Guide. Visual Scheduler

Planning can be done across weekly, quarterly, or monthly periods and across different resource types. Use Visual Scheduler for time-oriented planning and Load Management for detailed truck or compartment assignment.

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

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

January Week 04, January

22 23 24 25 26 27 28 29 30 31

### Scheduler Setup

Period

Type

Period Type ..... Month

Dates

Period Start ..... Month

Period End ..... Quarter

Scheduled Resource

Scheduled Resource ..... Vehicle

Period Highlights

# 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: 1/23/2026

M9 LOGISTICS

Navigate [Setup](#) | More options

Drivers Vehicles Drivers

### General

No. M9 LOGISTICS Mode of Transport ROAD

Name M9 Logistics Blocked

Freight Agreement No. Truckload Shipping Type None

### Defaults

**Vehicle**

Default Vehicle No. TRUCK0432

Default Vehicle Name Volvo Truck 433

**Vehicle Unit Type**

Default Unit Type

Default Unit Type Description

**Driver**

Default Driver No. ED

Default Driver Name Ed Korso

### Link

Source Type Vendor Source Name Texpro Maroc

Details Attachments (0)

Picture

Attachments

(There is nothing to show in this view)



# 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: 1/23/2026

TRR2

Navigate

### General

No.	TRR2	Manufacturer	Scania
Name	TRK 04 - SCANIA R590	Year	2019
Vehicle Type	Car	Color	white
Model	R560	Default Map Location	

### Carrier

Carrier No.	DE	Carrier Name	Oleg Lobakov
-------------	----	--------------	--------------

### Defaults

Default Driver No.		Default Driver Name	
--------------------	--	---------------------	--

### Type / Sizes

Details Attachments (0)

#### Picture



#### Attachments

File	Categ...
------	----------



# 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: 1/23/2026 ✎ 🔗 + 🗑️ ✓ Saved 🔖 📧 ↗️

## TRR2

Navigate ℹ️

---

### Type / Sizes

Unit Type Code	C20FRC	Sizes	
Unit Type Description	20' Flat Rack container	Unit Type - Linear UoM	MM
Unit Type - Volume UoM	M3	Unit Type - Internal Length	5,935.00
Unit Type - Volume	33.12	Unit Type - Internal Width	2,398.00
		Unit Type - Internal Height	2,327.00

---

### Registration

Registration No.	PMA703	VIN No.	G839829384924
Registration Date	4/5/2019		

---

### Engine

Engine Type	Diesel	Engine Power	560.00
Engine No.	4358734	Engine Model	FH

### Details

Attachments (0)

#### Picture



#### Attachments

File	Categ...
(There is nothing to show in this view)	



# 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.

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

TRR2

Navigate

**Fixed Asset**

Fixed Asset No. FA000020 Fixed Asset Description Toyota Supra 3.0

**Depreciation Books** Manage Depr. Book

New Line Delete Line

Depreciation Book Code ↑	FA Posting Group	Depreciation Method	Depreciation Starting Date	No. of Depreciation Years	Depreciation Ending Date	Declining-Balance %	Dis... Of	Book Value
→ COMPANY	CAR	Straight-Line	5/1/2025	5.00	4/30/2030	0.00	<input type="checkbox"/>	36,400.00

Details Attachments (0)

Picture



# 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

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

**Details** Attachments (0)

Picture

Attachments

(There is nothing to show in this view)

The field indicates which carrier the driver belongs to.

The default vehicle that will be selected when this driver is chosen in the Transport Order.

Thank you

[Get TMS - AppSource](#)