



EXTENSIONS-LAB

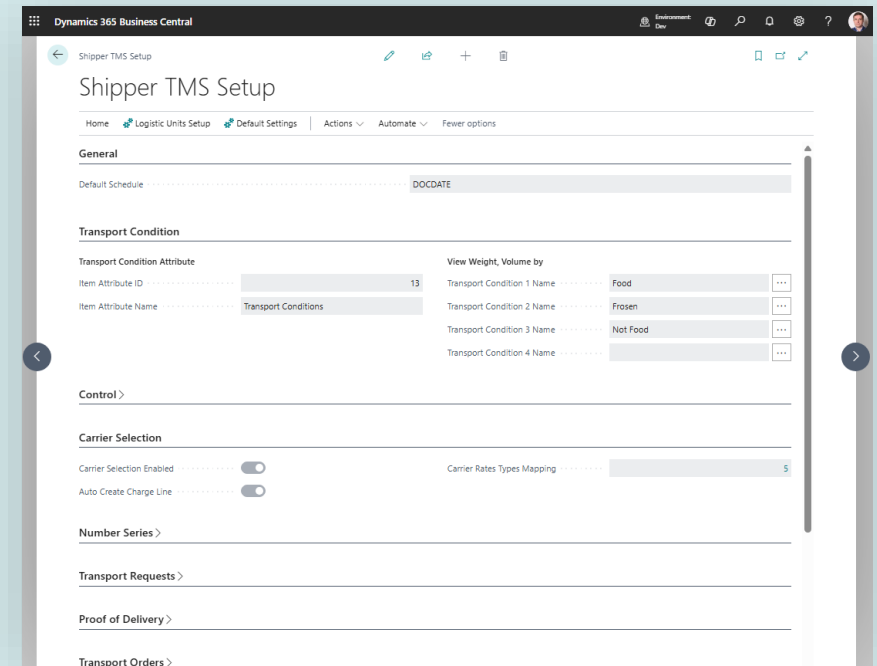
Shipper TMS

Setup & Settings Guide

Configuration process for Microsoft Dynamics 365 Business Central

Set up transport requests, truck loads, carrier rates, route intelligence, warehouse execution, proof of delivery, and telematics.

Updated configuration guide



Shipper-only setup language

Transport Requests and Transport Orders are the operating model. Forwarding Orders, LSP services, and customer settlement setup are intentionally excluded.



Purpose and scope

This guide replaces legacy mixed TMS setup with a Shipper-only configuration process.

Covered in this guide

- Shipper TMS Setup, number series, map providers, and readiness checks
- Transport Request creation from sales, purchase, and transfer flows
- Transport Orders, load planning, vehicles, drivers, carriers, routes, and capacity rules
- Carrier rates, freight charge allocation, warehouse execution, PoD, APIs, and telematics

Not covered here

- Forwarding Orders and Forwarding Order Types
- LSP customer settlement services, invoicing catalogs, and forwarding service sets
- LSP stage profiles used for forwarding business processes
- Any process whose primary customer is an external logistics client rather than your own shipment flow

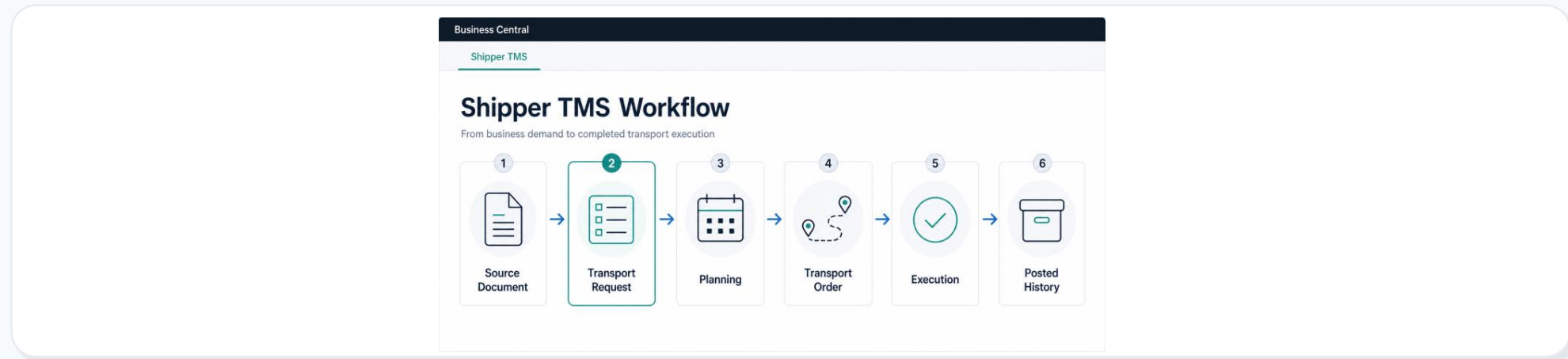
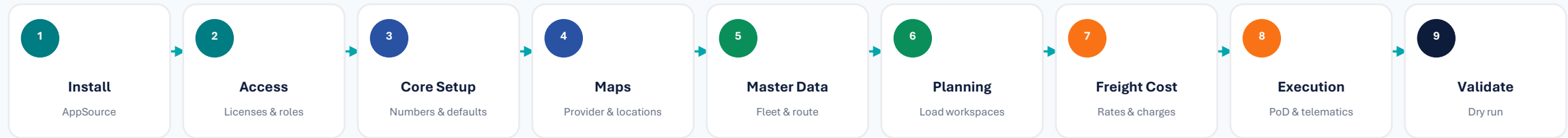
Operating model

**Source documents → Transport Requests → Transport Orders → Execution
/ posting history**



Configuration roadmap

Set up the foundation first, then enable the planning and execution layers your operation uses.



Use the same data model across every setup step: Transport Requests are the demand layer, Transport Orders are the dispatch layer, and execution/posted history keeps the audit trail.



Readiness checklist

Run Check TMS Settings before handing the configuration to planners.

Minimum go-live gates

- 1 Transport Request, Transport Order, and MAP Location number series are filled.
- 2 Default Mode of Transport is selected for new Transport Orders.
- 3 Map Provider is selected and the required key is saved.
- 4 Source document behavior is decided: manual or auto-create requests.
- 5 Capacity controls match the data your vehicles and items actually maintain.
- 6 Optional features such as carrier selection, PoD, and telematics pass their own setup checks.

The screenshot displays the Dynamics 365 Business Central interface for the 'Shipper TMS Setup' page. A dialog box is overlaid on the page, indicating that the TMS setup check has passed. The dialog box contains the following text:

TMS setup check passed.
 Number Series: Required number series are configured.
 Transport Orders: Default Mode of Transport: ROAD.
 Map Provider: Azure Maps is selected and subscription key is set.
 Carrier Selection: Enabled. Mapping records: 5.
 Transport Requests: Auto creation is disabled. Transport Requests will be created manually. Planning Date check on release is enabled.
 Mandatory: Number series: Transport Request Nos., Transport Order Nos., MAP Location Nos., Transport Orders: Default Mode of Transport, Map Provider: provider selection and credentials.
 Configured: Carrier Selection, Number Series, Transport Requests, Transport Orders, Map Provider

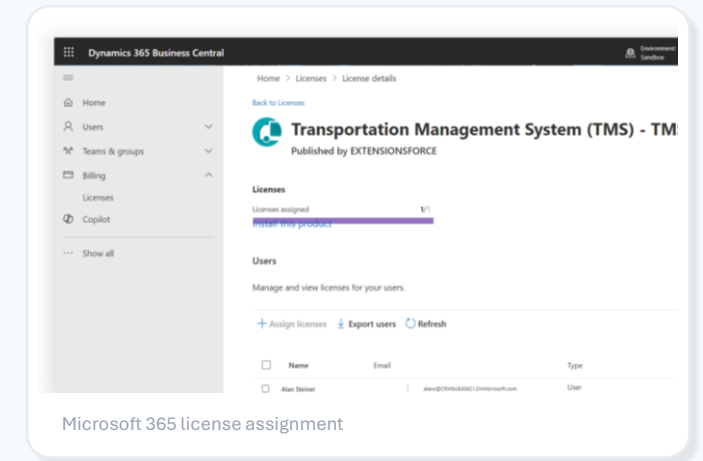
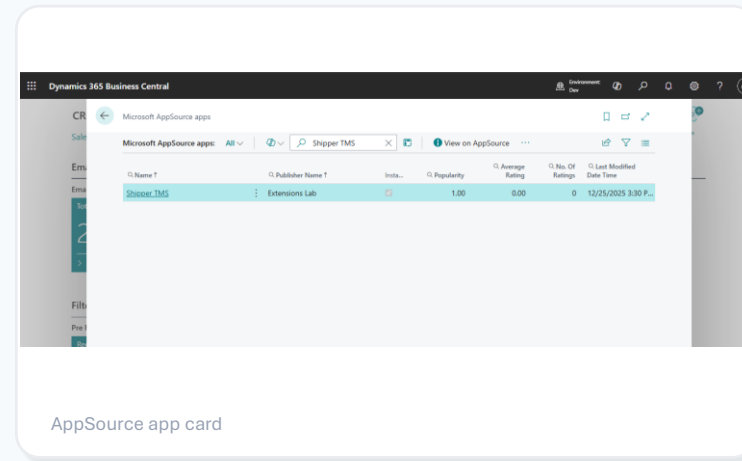
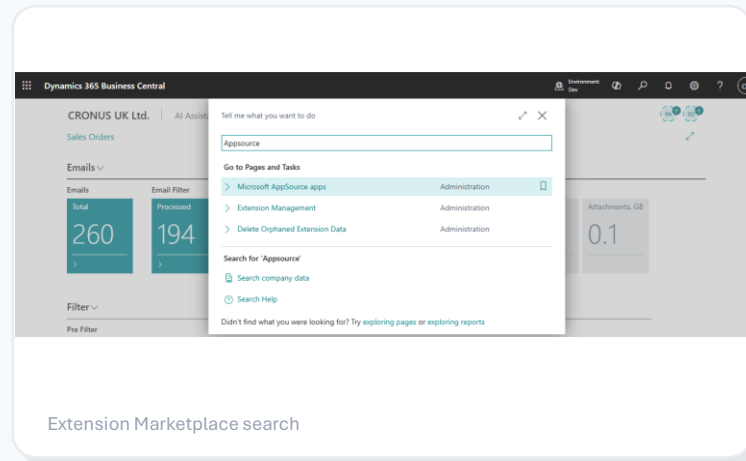
The background page shows the 'Shipper TMS Setup' configuration page with sections for General, Transport Condition, Control, Carrier Selection, Number Series, Transport Requests, Proof of Delivery, and Transport Orders. The 'Carrier Selection' section shows 'Carrier Selection Enabled' and 'Auto Create Charge Line' as disabled. The 'Number Series' section is expanded, showing 'Transport Request Nos.' and 'Transport Order Nos.'.

Shipper TMS readiness check



Install and license Shipper TMS

Install the extension from AppSource, then license only the users who work with TMS features.



Who needs a license?

- Planners, dispatchers, transportation admins, users who release or post transport documents, and integration accounts that call Shipper TMS APIs.
- Business Central users who never open TMS features do not need a Shipper TMS license.

After installation, verify with Tell Me → Shipper TMS Setup.



Assign permission sets by responsibility

Give users only the access they need for planning, setup, APIs, or telematics.

Role	Permission set caption	Use it for
Planner / dispatcher	Shipper TMS - User	Daily requests, orders, planning pages
System admin	Shipper TMS - Administrator	Setup pages and configuration changes
Integration account	Shipper TMS - API	API access to transport entities
Telematics webhook/API	Shipper TMS - Tel. API	Telematics data exchange
Telematics admin service	Shipper TMS - Tel. Admin API	Provider administration actions

Recommended pattern: planners get User; setup owners get User + Administrator; integration accounts get API-specific permission sets only.

The screenshot shows a user card for Anton Gerasimov. The user's name is Anton Gerasimov, and their contact email is gerasimov@extensions-force.com. They are using a Microsoft 365 account with the same email address. The user's status is Active.

Below the user details, there is a section for 'User Permission Sets'. The table below shows the assigned permission sets:

Permission Set ↑	Description	Company ↑	Extension Name	Permission Scope
<input type="radio"/> AUTOMATE - EXEC	Automate - Exec	CRONUS UK Ltd.	System Application	System
<input type="radio"/> D365 BUS PREMIUM	Dyn. 365 Prem. Bus. Full Acc.	CRONUS UK Ltd.	Base Application	System
<input type="radio"/> EXCEL EXPORT ACTION	D365 Excel Export Action	CRONUS UK Ltd.	System Application	System
<input type="radio"/> LOCAL	Country/region-specific func.	CRONUS UK Ltd.	Base Application	System
<input type="radio"/> LOGIN	Login access	CRONUS UK Ltd.	System Application	System
<input checked="" type="radio"/> SHIPPER TMS USER	Shipper TMS - User		Shipper TMS	System
<input checked="" type="radio"/> SHIPPER TMS ADMIN	Shipper TMS - Administrator		Shipper TMS	System

User Permission Sets on the Business Central user card



Open Shipper TMS Setup

The setup page is the control center for numbering, planning, maps, carrier selection, reports, PoD, and telematics access.

WHERE

Search for Shipper TMS Setup, open it from Manual Setup, or run the Assisted Setup wizard when using a guided first-run flow.

HOW

Start with mandatory fields, then enable optional features only when their supporting master data exists. Use actions such as Check TMS Settings, Set default reports, Logistic Units Setup, and Telematics Setups.

WHY

This keeps planners from creating Transport Requests and Transport Orders that cannot be numbered, routed, released, costed, or executed.

One setup page controls the operating model.

The screenshot displays the 'Shipper TMS Setup' page in Dynamics 365 Business Central. The page is titled 'Shipper TMS Setup' and shows various configuration options. The 'General' section includes 'Default Schedule' set to 'DOCDATE'. The 'Transport Condition' section has a table with columns 'Transport Condition Attribute' and 'View Weight, Volume by'. The 'Carrier Selection' section has 'Carrier Selection Enabled' and 'Auto Create Charge Line' toggles. The 'Number Series' section is expanded to show 'Transport Requests', 'Proof of Delivery', and 'Transport Orders'.

Transport Condition Attribute	View Weight, Volume by
Item Attribute ID 13	Transport Condition 1 Name Food
Item Attribute Name Transport Conditions	Transport Condition 2 Name Frozen
	Transport Condition 3 Name Not Food
	Transport Condition 4 Name

Carrier Selection Enabled Carrier Rates Types Mapping 5

Auto Create Charge Line

Number Series >

Transport Requests >

Proof of Delivery >

Transport Orders >

Shipper TMS Setup page



Number series: the first setup gate

Document numbers must exist before users create planning records or print transport documents.

Field	Used for	Required?
Transport Request Nos.	Demand records created from source documents	Yes
Transport Order Nos.	Dispatch-ready loads and trips	Yes
MAP Location Nos.	Geocoded stop master data	Yes
CMR Nos.	CMR documents for transport orders	When printing CMR

Setup sequence

Create or choose Business Central No. Series first, then fill these fields before testing source-document creation.

The screenshot displays the 'Shipper TMS Setup' page in Dynamics 365 Business Central. The page is titled 'Shipper TMS Setup' and includes a navigation bar with 'Home', 'Logistic Units Setup', 'Default Settings', 'Actions', 'Automate', and 'Fewer options'. The main content area is divided into several sections:

- General:** Includes 'Default Schedule' set to 'DOCDATE'.
- Transport Condition:** Includes 'Transport Condition Attribute' and 'View Weight, Volume by'. Under 'Transport Condition Attribute', 'Item Attribute ID' is set to '13' and 'Item Attribute Name' is 'Transport Conditions'. Under 'View Weight, Volume by', 'Transport Condition 1 Name' is 'Food', 'Transport Condition 2 Name' is 'Frozen', 'Transport Condition 3 Name' is 'Not Food', and 'Transport Condition 4 Name' is empty.
- Carrier Selection:** Includes 'Carrier Selection Enabled' (toggle off) and 'Auto Create Charge Line' (toggle off). 'Carrier Rates Types Mapping' is set to '5'.
- Number Series >**
- Transport Requests >**
- Proof of Delivery >**
- Transport Orders >**

At the bottom of the page, there is a caption: 'Number Series group on Shipper TMS Setup'.



Default operating model

These defaults control how a new Transport Order behaves before planners make day-specific changes.

Fields to decide before go-live

- Default Schedule: workday / availability calendar used by planning logic.
- Default Mode of Transport: mandatory baseline for new Transport Orders.
- Default Carrier: use only when most loads start from the same carrier or own-fleet organization.
- Default Charge Assignment Type and Default Item Charge Assignment Type: default method for freight-cost distribution.
- Truck Load Time Slot Profile: generates truck and driver planning slots.
- Require Driver Before Release: blocks release when own-fleet execution needs a named driver.
- Skip Route Optimization Wizard: use for fast optimization with default settings.

Dynamics 365 Business Central

Shipper TMS Setup

Home | Logistic Units Setup | Default Settings | Actions | Automate | Fewer options

General

Default Schedule DOCDATE

Transport Condition

Transport Condition Attribute

Item Attribute ID 13

Item Attribute Name Transport Conditions

View Weight, Volume by

Transport Condition 1 Name Food

Transport Condition 2 Name Frozen

Transport Condition 3 Name Not Food

Transport Condition 4 Name

Control >

Carrier Selection

Carrier Selection Enabled

Auto Create Charge Line

Carrier Rates Types Mapping 5

Number Series >

Transport Requests >

Proof of Delivery >

Transport Orders >

Default values and Transport Orders group



Transport Request creation rules

Choose whether demand enters TMS manually or automatically when source documents are released.

Setting	What it changes
Auto Create Transport Request for Sale	Released sales documents can create outbound Transport Requests automatically.
Auto Create Transport Request for Purchase	Released purchase documents can create inbound Transport Requests automatically.
Auto Create Transport Request for Transfer	Released transfer orders can create transfer Transport Requests automatically.
Build Estimated Logistic Units	Builds estimated logistic-unit data for planning and capacity review.
Check Planning Date on Release	Blocks release when the required planning date is missing.

**Use auto-creation when source-document release is the handoff to transportation.
Keep it manual if planners review demand before creating requests.**

The screenshot displays the Dynamics 365 Business Central interface for a Sales Order (101038) for Adatum Corporation. The main window shows the 'Transport & Delivery' section with fields for Order Date (4/8/2024), Due Date (5/8/2024), and Status (Open). Below this is a table of lines with columns for Type, No., Item Reference No., Description, Location Code, and Quantity. The table lists items such as 'Food Simple', 'Ice Cream', 'ATHENS Desk', and 'ATHENS Mobile Pedestal'. A summary sidebar on the right provides a 'Summary' section with a 'Start summarizing' button and a 'Sell-to Customer Sales History' section showing metrics for Ongoing Sales Orders, Blanket Orders, and Credit Memos.

Source document actions and transportation fields



Capacity controls

Turn on only the capacity dimensions your item, logistic-unit, and vehicle master data can support.

Available control flags

Weight

Mass limit

Volume

Cubic capacity

Footage

Floor / linear feet

Logistic Units

Pallets / boxes /
containers

- Capacity checks are used when assigning requests, calculating load %, and releasing loads.
- The result depends on item weight / dimensions, logistic unit estimates, vehicle capacities, and compartment setup.
- A controlled dimension with missing master data can create false blockers or misleading load percentages.

The screenshot shows the 'Truck Load Management' interface in Dynamics 365 Business Central. It includes a filter section with the following values:

- Planning Date From: 4/20/2026
- Time Slot: MORNING
- Planning Date To: 4/26/2026
- Carrier: (empty)
- Depot: (empty)
- Candidates: All With Reasons
- Vehicle Unit Type: (empty)

Below the filters is a table of transport requests:

Planning Date	Time Slot	Vehicle No. 1	Vehicle Name	Depot	Driver Name	Status	Next Step	Transport No.
4/20/2026	Morning dispatch	DEMO04	Demo - 04	Depot		Empty	Plan Load	-
4/20/2026	Morning dispatch	DEMO05	Demo - 05			Empty	Plan Load	-
4/20/2026	Morning dispatch	DEMO06	Demo - 06			Empty	Plan Load	-
4/20/2026	Morning dispatch	DEMO07	Demo - 07			Empty	Plan Load	-
4/20/2026	Morning dispatch	DEMO08	Demo - 08			Empty	Plan Load	-
4/20/2026	Morning dispatch	IVECO	Iveco		John Robinson	Empty	Plan Load	-
4/20/2026	Morning dispatch	TEST2	Test vehicle			Empty	Plan Load	-
4/20/2026	Morning dispatch	V1	Truck 1			Empty	Plan Load	-
4/20/2026	Morning dispatch	V2	Truck 2			Empty	Plan Load	-
4/21/2026	Morning dispatch	DEMO04	Demo - 04	Depot		Empty	Plan Load	-
4/21/2026	Morning dispatch	DEMO05	Demo - 05			Empty	Plan Load	-
4/21/2026	Morning dispatch	DEMO06	Demo - 06		Oleg Lobakov	Empty	Plan Load	-
4/21/2026	Morning dispatch	DEMO07	Demo - 07			Empty	Plan Load	-
4/21/2026	Morning dispatch	DEMO08	Demo - 08			Empty	Plan Load	-
4/21/2026	Morning dispatch	IVECO	Iveco		John Robinson	Empty	Plan Load	-

Below the table is a section for 'Eligible Transport Requests':

Eligibility Status	Score	Transport Request No.	Planning Base Date	Load Date	Unload Date	Route No.	Delivery Schedule	Transport Conditions
Blocked		TRO-242	4/20/2026	4/23/2026	4/23/2026	ROUTE1	MT	Not Food
Blocked		TRO-243	4/20/2026	4/23/2026	4/23/2026	ROUTE1	MT	Not Food
Blocked		TRO-244	4/20/2026	4/23/2026	4/23/2026	ROUTE1	MT	Not Food

Capacity-based candidate reasons in Truck Load Management



Transportation conditions

Use item attributes to separate cargo that should not be mixed in the same request, load, or compartment.

- 1 Create a standard Business Central Item Attribute such as Temperature Class or Hazmat Class.
- 2 Create values such as Frozen, Refrigerated, Ambient, or Hazardous.
- 3 Assign values to items.
- 4 Select the attribute in Shipper TMS Setup → Transport Condition.
- 5 Optionally fill Transport Condition 1..4 Names for dedicated weight/volume columns.
- 6 Enable Split Delivery Note by Transport Condition when paperwork should be separated by cargo condition.

The screenshot displays the 'Shipper TMS Setup' interface in Dynamics 365 Business Central. The 'Transport Condition' section is the primary focus, showing a table with two columns: 'Transport Condition Attribute' and 'View Weight, Volume by'. The 'Transport Condition Attribute' column contains 'Item Attribute ID' (13) and 'Item Attribute Name' (Transport Conditions). The 'View Weight, Volume by' column lists four transport condition names: 'Food', 'Frozen', 'Not Food', and an empty field for 'Transport Condition 4 Name'. Below this, the 'Carrier Selection' section includes a 'Carrier Selection Enabled' toggle (disabled), an 'Auto Create Charge Line' toggle (disabled), and a 'Carrier Rates Types Mapping' field set to 5. Other sections like 'Control', 'Number Series', 'Transport Requests', 'Proof of Delivery', and 'Transport Orders' are visible but mostly collapsed. A note at the bottom of the page states 'Compatibility by transportation condition'.

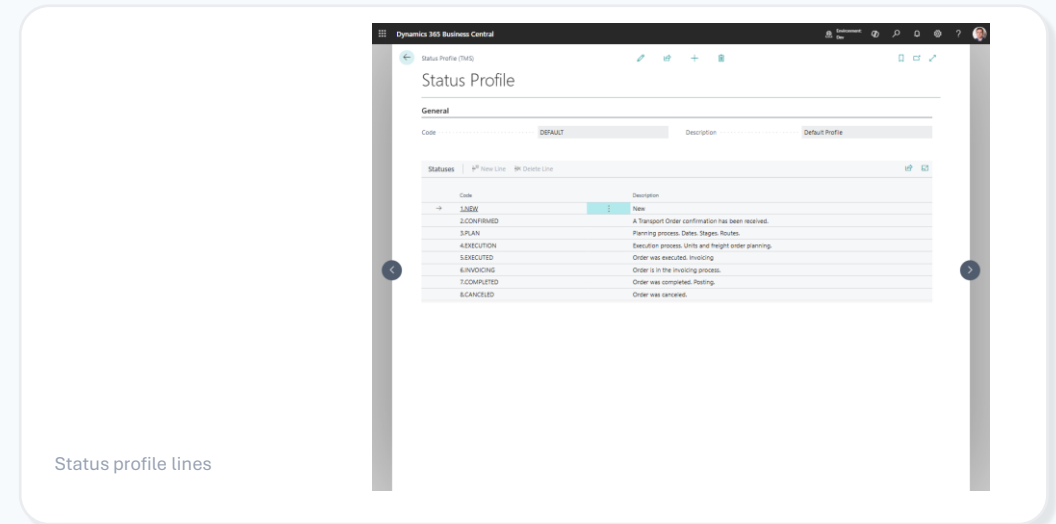


Proof of Delivery and execution status

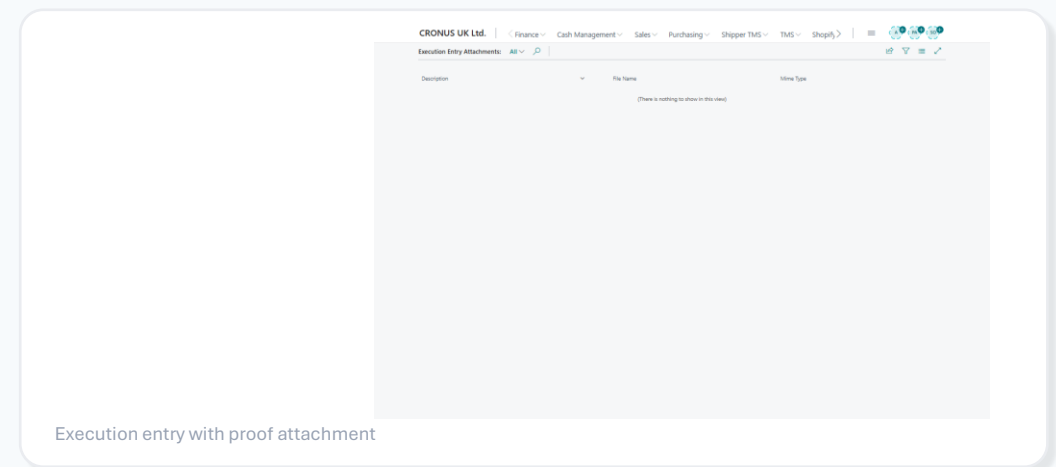
Enable PoD only after you define the status profile that represents physical execution.

Setup field	Purpose
Enable Proof of Delivery	Turns on execution confirmation and PoD-related tracking.
Transport Execution Status Profile	Defines allowed execution statuses such as planned, started, arrived, delivered, exception, or completed.

- Keep execution statuses operational; do not reuse finance or LSP forwarding statuses.
- Use execution entries to capture status facts, coordinates, notes, attachments, signatures, or provider events.
- PoD is most valuable when drivers, telematics, or field users feed status facts back into Business Central.



Status profile lines



Execution entry with proof attachment



Map, distance, and route intelligence

Choose a provider, create reliable MAP locations, and decide when truck-aware routing matters.

In this section

- Google Maps or Azure Maps
- Provider keys and geo scope
- MAP locations and distance cache
- Vehicle routing profiles

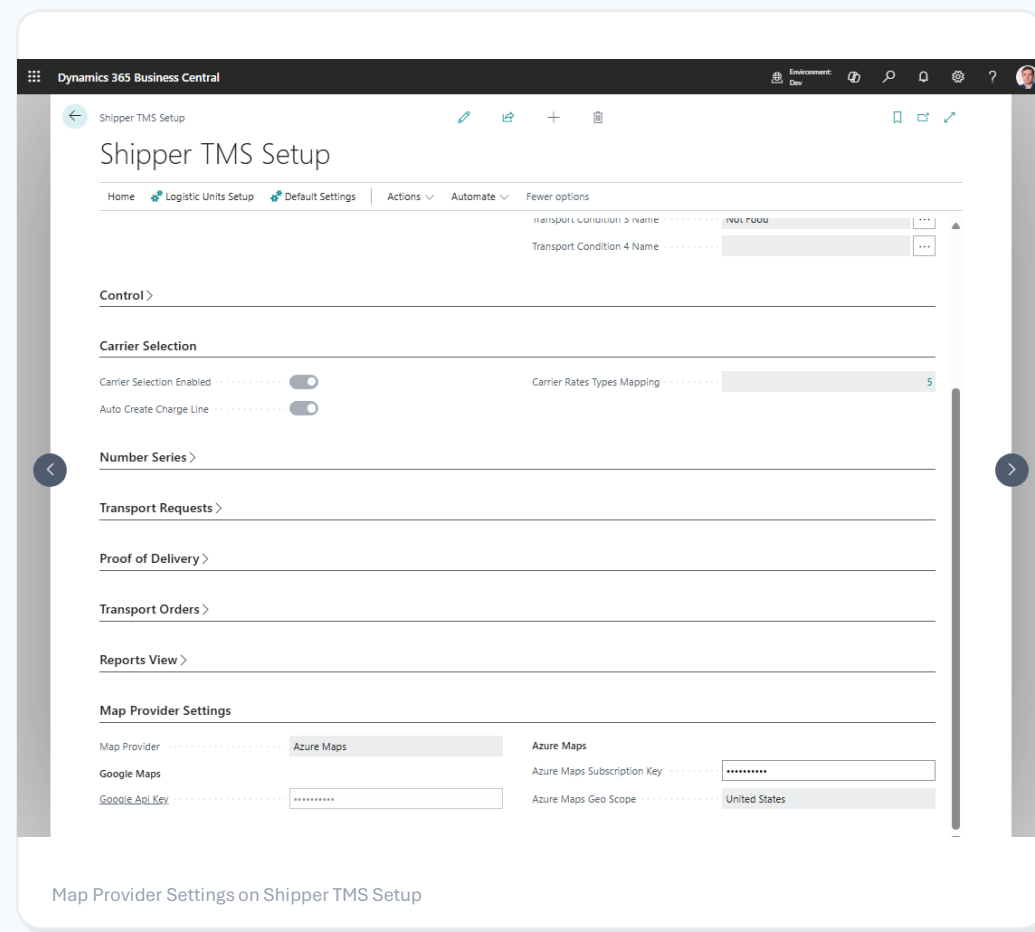


Choose a map provider

The map provider drives geocoding, route display, distance, duration, and route optimization.

Provider	Best when	Check before choosing
Google Map	You need standard address geocoding and road routing.	Truck-specific routing fields are not used in the same way as Azure truck profiles.
Azure Maps	You need truck-aware routing with vehicle restrictions.	Requires Azure Maps key, geo scope decision, and vehicle routing profiles.

- After changing provider, geocode important MAP Locations and recalculate distances for stored routes.
- Keep keys secret: mask them in screenshots and rotate them according to your security policy.
- Use Check TMS Settings to detect missing provider credentials before planners test routing.



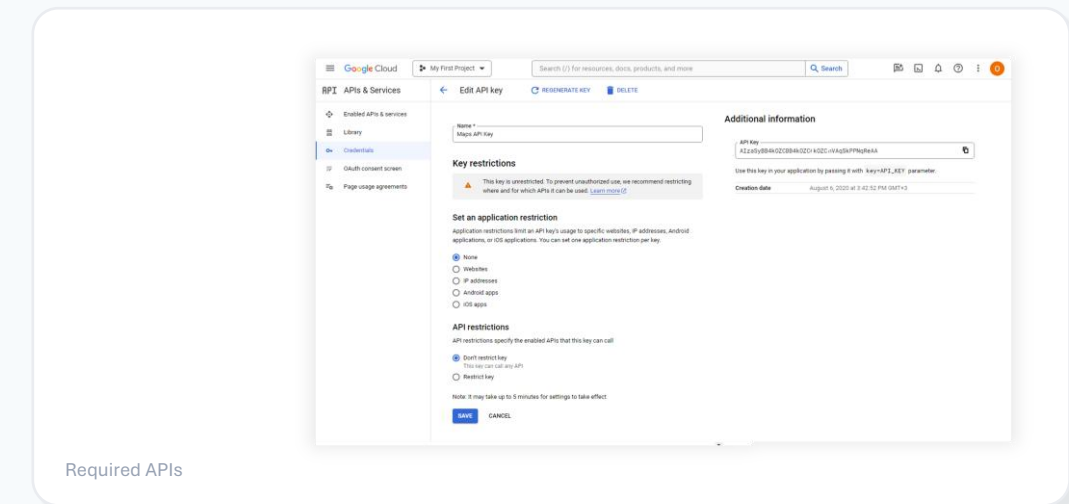
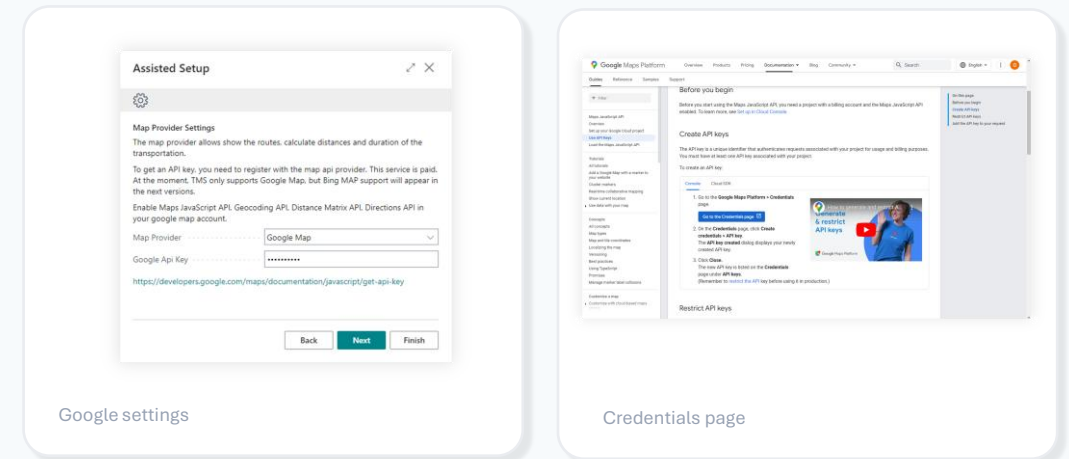
Map Provider Settings on Shipper TMS Setup



Configure Google Maps

Use Google Maps when the process needs standard geocoding, distance, and routing.

- 1 Prepare a Google Cloud project with billing enabled.
- 2 Enable Maps JavaScript API, Directions API, Geocoding API, and Distance Matrix API.
- 3 Create an API key and restrict it according to company policy.
- 4 Open Shipper TMS Setup and set Map Provider to Google Map.
- 5 Paste the key in Google Api Key and test geocoding from a MAP Location.





Configure Azure Maps

Use Azure Maps when route calculation must consider truck and cargo restrictions.

- 1 Create or open an Azure Maps account in the Azure portal.
- 2 Copy the Primary Key from Authentication.
- 3 Open Shipper TMS Setup and set Map Provider to Azure Maps.
- 4 Paste the key in Azure Maps Subscription Key.
- 5 Select Azure Maps Geo Scope: Global, Europe, or United States.
- 6 Test geocoding, then calculate distance on a Transport Request or Transport Order.

Add Vehicle Routing Profiles when truck height, weight, axle, hazmat, or toll restrictions matter.

The screenshot shows the 'Shipper TMS Setup' interface. The 'Map Provider Settings' section is highlighted with a red box. It includes the following fields:

- Map Provider: Azure Maps
- Azure Maps Subscription Key: [Redacted]
- Azure Maps Geo Scope: United States

Other sections visible in the interface include:

- Carrier Selection: Carrier Selection Enabled (toggle), Auto Create Charge Line (toggle), Carrier Rates Types Mapping (dropdown)
- Number Series >
- Transport Requests >
- Proof of Delivery >
- Transport Orders >
- Reports View: Split Delivery Note by Transport Condition (toggle)

Azure Maps key and Geo Scope in Shipper TMS Setup



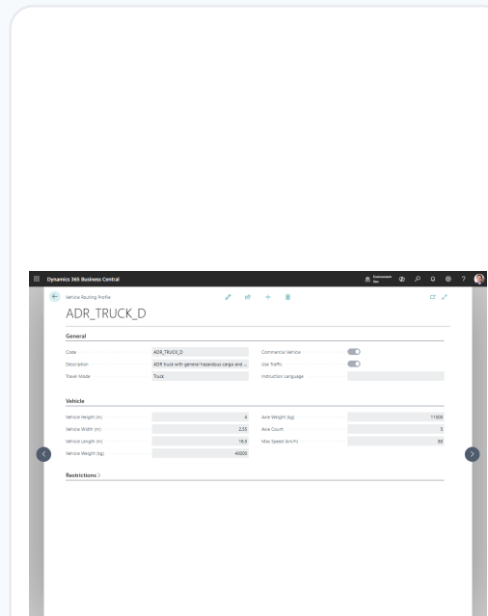
Vehicle Routing Profiles

Profiles translate equipment restrictions into Azure Maps truck-routing parameters.

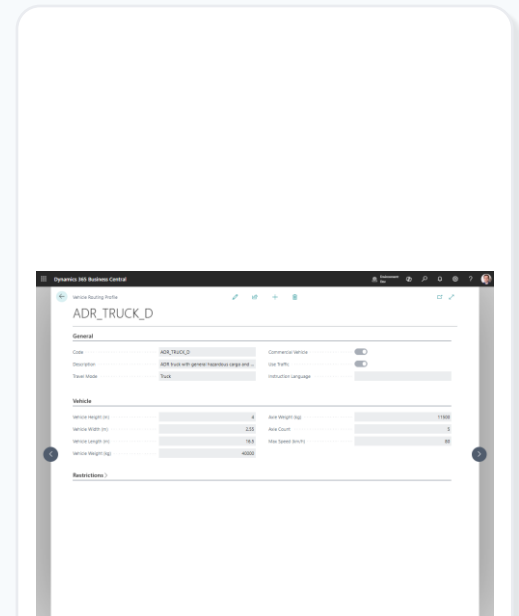
Create profiles for equipment families

- Travel mode and commercial vehicle flag
- Height, width, length, gross weight, axle weight, and axle count
- Max speed, traffic usage, route instructions, and avoid options
- Hazardous-load category and ADR tunnel restrictions when applicable
- Assign the profile to the relevant Logistic Unit Type / vehicle unit type

Changing a routing profile can make stored route-distance values outdated. Recalculate distances before relying on route cost or duration.



Profile card



Routing settings



MAP Location Types and MAP Locations

Stable location master data is the foundation for geocoding, routes, distance, carrier comparison, and depot planning.

- 1 Define MAP Location Types for warehouses, customers, vendors, depots, terminals, ports, or custom stop classes.
- 2 Create MAP Locations manually or through assisted setup for customers, ship-to addresses, vendors, order addresses, and locations.
- 3 Use the MAP Location Nos. number series for new location records.
- 4 Geocode addresses and confirm latitude / longitude before using them in route calculation.
- 5 Keep source links updated so master data changes can be traced back to Business Central records.

Name	Description	Default for Customer	Default for Vendor	Default for Ship-to	Default for Order	Default for Receipt	Default for Transfer
ARNDT	Arport						
CUSTOMER	Customer						
DC	Distribution Center						
DEPOT	Depot						
CUSTOMER	Customer						
HUB	Hub						
PLANT	Plant or Manufacture						
PORT	Port						
RS	Railway station						
SHIP	Shipping point						
TERMINAL	Terminal						
VENDOR	Vendor						
WHS	Company Warehouse						

MAP Location Types

MAP Location

M0000037, CA, Montreal, QC H2C 1H9, 1642 Boul Henri-Bourassa E

Geocode address... Assign Zone Update address... Update status... Help More options

General

No. M0000037

Description 1642 Boul Henri-Bourassa E

Type Code CUSTOMER Source Type Customer

UFA Airport Code CA-MON-0000 Customer No. CA-MON-0000

Handling Time

Customer Name Link Site URL

Address

Address 1642 Boul Henri-Bourassa E

Country/Region Code CA

City Montreal

Postal Code QC-H2C 1H9

County QC

Position

Geocoded MAP Location



Distance Matrix and recalculation

Distance Matrix stores route distance and duration so planners can reuse known route results.

Recalculate after changes to

- Shipper or consignee address / coordinates
- Route stop order or route sequence
- Carrier start / end MAP Location
- Map provider or provider credentials
- Vehicle unit type or Azure routing profile
- Truck restrictions, hazmat rules, or avoid-toll policy

The screenshot shows the 'Distance Matrix' interface. At the top, there is a navigation bar with a back arrow, the title 'Distance Matrix', and a 'Saved' status. Below the navigation bar is a toolbar with '+ New', 'Edit List', 'Delete', 'Category 5', and 'More options'. The main area contains a table with the following columns: From Map Location Code, To Map Location Code, Distance, Dur..., Description, To Country/Code, To City, To Post Code, To Address, and Mode of Transport. A single record is visible in the table:

From Map Location Code	To Map Location Code	Distance	Dur...	Description	To Country/Code	To City	To Post Code	To Address	Mode of Transport
M0000034	M0000036	9500000	5 days	Haven van Rotterd...	NL			3198 LK Europoort Rotterdam	OCEAN

At the bottom of the interface, there is a label 'Distance Matrix records'.

Why it matters: distance and duration affect planning feasibility, carrier cost comparison, route optimization, and driver/vehicle scheduling.



Master data that drives planning

Set up carriers, vehicles, drivers, routes, zones, time slots, logistic units, and product attributes before planners use the workspaces.

In this section

- Carrier, vehicle, driver records
- Routes, route sequence, zones
- Logistic units and product data
- Delivery schedules and time slots



Carriers

A carrier can represent your own fleet organization, an external transport company, or a subcontracted carrier.

WHAT

Carrier records default values into Transport Orders and connect planning, carrier rates, route points, scheduler behavior, and telematics setup.

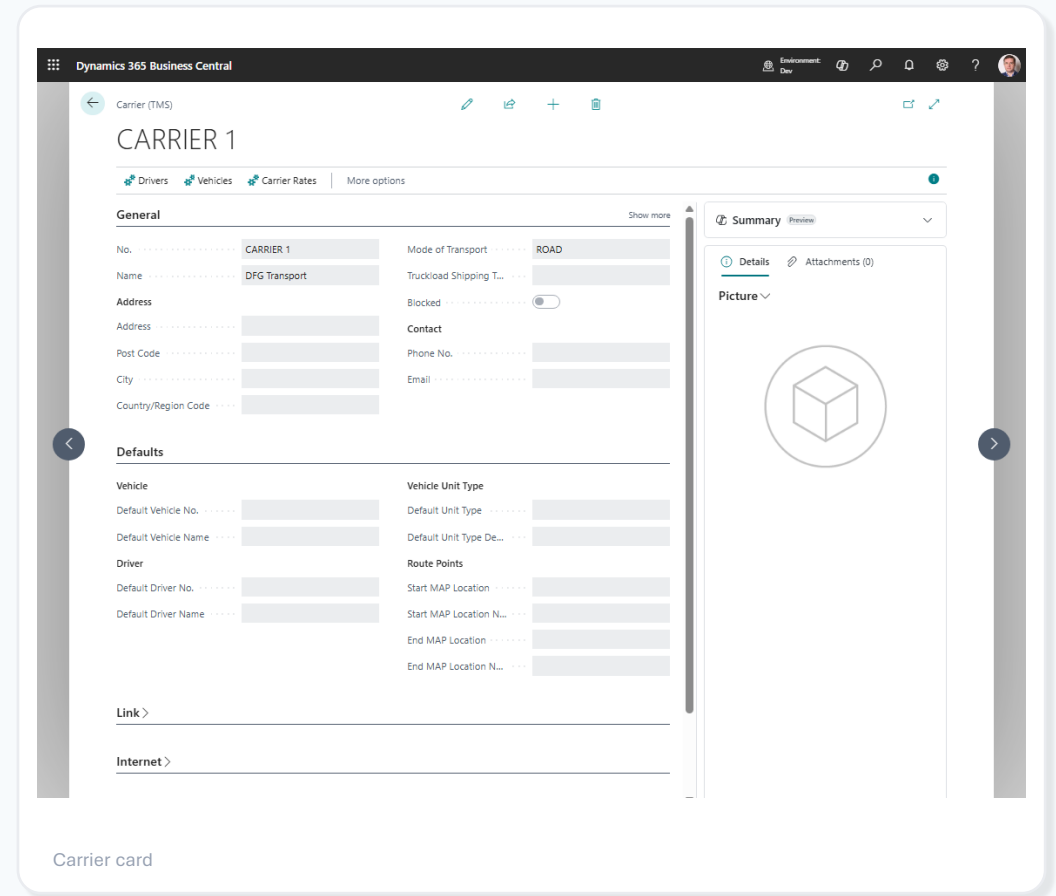
HOW

Fill address and contact fields, link Source Type / Source No. to vendor, employee, resource, or shipping agent when useful, then set defaults for vehicle, driver, unit type, and route start/end MAP Locations.

WHY

A well-maintained carrier record reduces manual order entry and keeps own-fleet and hired-carrier planning in one model.

Use Block for Scheduling to remove a carrier from planning boards without deleting it.





Vehicles and compartments

Vehicles define capacity, ownership, scheduling visibility, telematics mapping, and the way load percentage is calculated.

WHAT

Maintain each owned or hired vehicle that planners assign to Transport Orders or Truck Load Management slots.

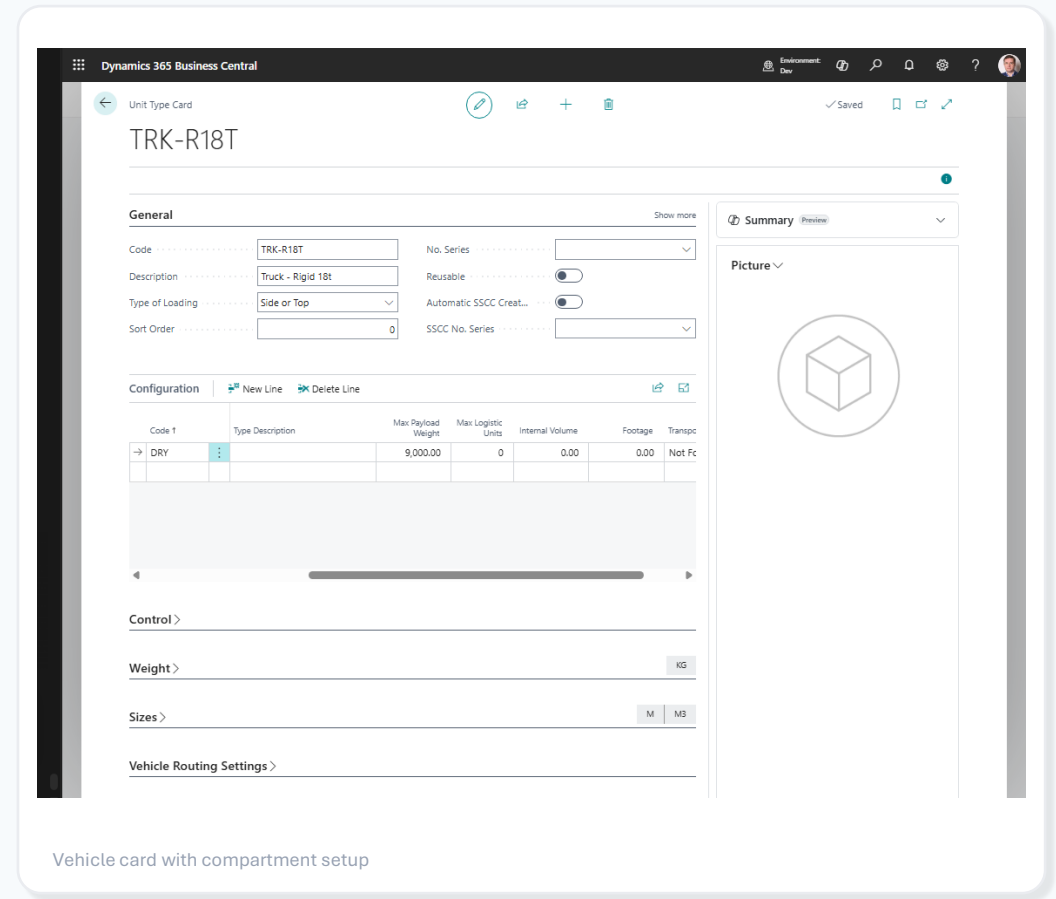
HOW

Set carrier, vehicle unit type, default driver, depot / MAP location, weight, volume, footage, logistic-unit capacity, and scheduling flags. Add compartments when one vehicle can carry separated cargo.

WHY

Truck Load Management can only explain capacity, candidate fit, overload, and compartment blockers when vehicle setup is complete.

Capacity controls are only as accurate as vehicle and item data.



Vehicle card with compartment setup



Drivers

Driver records connect people, default vehicles, scheduling conflicts, and execution requirements.

WHAT

Use driver cards when your company plans own-fleet work, requires drivers before release, or wants driver-first planning and conflict control.

HOW

Assign carrier, default vehicle, contact data, license details, medical card, ADR certificate, and scheduling flags. Block drivers that should not appear in planning.

WHY

Driver Load Management and release checks can detect double-booking, missing driver assignment, and driver-to-vehicle issues before dispatch.

Default vehicle helps planners create consistent truck slots faster.

The screenshot shows the Dynamics 365 Business Central interface for a Driver card. The card number is 4534-78564. The driver's name is Oleg Lobakov. The carrier is OWNLOGISTICS. The contact number is +1 8902971123. The interface includes sections for General, Carrier, Defaults, Personal Information, Contact, License, and Scheduler. A Summary panel on the right shows a Picture placeholder.

Driver card



Routes, Route Sequence, and Zones

Use route master data to group demand, filter planning views, and give optimization a practical starting point.

Setup object	Use it for
Routes	Group demand, set default carrier / vehicle / driver, plan by route, and sort resources.
Route Sequence	Maintain the normal visit order for customers, vendors, locations, ship-to, or order addresses.
Zones	Represent service geography, depots, delivery areas, or geofences used in planning and telematics.

- Route Sequence is a planning aid, not a hard lock; planners can still adjust the final stop order.
- Keep gaps in sequence numbers, such as 10, 20, 30, so new stops can be inserted later.
- Use Block for Scheduling on routes/resources that should not be shown in planning boards.

Route sequence on customer

Zone geometry



Delivery schedules and time slots

Time setup controls when requests should be planned and which truck / driver slots exist.

Setup logic

- 1 Define a Default Schedule when customer or delivery workdays need a baseline calendar.
- 2 Create a Time Slot Profile that matches real loading / delivery windows, such as morning, afternoon, night, or route waves.
- 3 Set Truck Load Time Slot Profile on Shipper TMS Setup for Truck Load and Driver Load Management.
- 4 Use planning periods to keep request pools, truck slots, driver slots, and scheduler views aligned.

Poor time-slot setup usually appears as missing truck slots, candidates outside the period, or release conflicts.

The screenshot shows the 'Truck Load Management' interface in Dynamics 365 Business Central. It includes a filter section with the following values: Planning Date From: 4/20/2026, Planning Date To: 4/26/2026, Time Slot: MORNING, Depot: (empty), and Candidates: All With Reasons. Below the filters is a table of planning slots with columns: Planning Date, Time Slot, Vehicle No. 1, Vehicle Name, Depot, Driver Name, Status, Next Step, and Transport No. The table shows slots for dates 4/20/2026 and 4/21/2026, with various vehicle names like DEMO04, DEMO05, etc., and statuses like 'Empty' and 'Plan Load'. At the bottom, there is a section for 'Eligible Transport Requests' with columns: Eligibility Status, Score, Transport Request No., Planning Base Date, Load Date, Unload Date, Route No., Delivery Schedule, and Transport Conditions. Three requests are listed, all with a status of 'Blocked' and 'Not Food' conditions.

Truck Load Management uses time-slot profiles to create planning slots



Logistic Units, products, and packages

Use logistic-unit data when load planning must reason about pallets, boxes, containers, compartments, and vehicle unit types.

- Logistic Unit Types describe pallets, boxes, containers, vehicle unit types, or compartments used in planning.
- Build Estimated Logistic Units can generate planning estimates when requests are created from source documents.
- Control Logistic Units uses the number of units as a capacity dimension.
- Vehicle Routing Profile Code on a unit type links equipment setup to Azure Maps truck-aware routing.
- Keep item weight, volume, footage, package, and transport-condition attributes current before enforcing capacity checks.

Code	Description	Load Piling Volume	Load Piling Weight
C20CFRC	20 Collapsible Flat Rack container	IS	IS
C20DC	20 Dry freight container	IS	IS
C20FRC	20 Flat Rack container	IS	IS
C20OSOPC	20 Open Side/Open Top container	IS	IS
C20OTC	20 Open Top container	IS	IS
C20RC	20 Reefer container	IS	IS
C40CFRC	40 Collapsible Flat Rack container	IS	IS
C40DC	40 Dry freight container	IS	IS
C40FRC	40 Flat Rack container	IS	IS
C40HCDC	40 High Cube Dry container	IS	IS
C40HRC	40 High Cube Reefer container	IS	IS
C40OTC	40 Open Top container	IS	IS
C40RC	40 Reefer container	IS	IS
C45HCDC	45 High Cube Dry container	IS	IS
C45HRC	45 High Cube Reefer container	IS	IS
CAT	Artificial Tweendeck	IS	IS
DHLBOX2	DHL Sizes - Box 2	IS	IS
DHLBOX3	DHL Sizes - Box 3	IS	IS
DHLBOX4	DHL Sizes - Box 4	IS	IS

Logistic Unit Type

Description	Unit of Measure	Package Class	Item	Stock Weight	Net Weight
REG CASE	Package level case	PCS	123456789	18.00	17.50
REG PALLET	Freight pallet goods	PCS	123456789	300.00	290.00
DHL BOX	Driver product box	PCS	123456789	12.00	11.50

Products / cargo master data



Planning workspace setup

Choose how dispatchers should plan: from requests, truck slots, drivers, or a visual timeline — all using the same Transport Request and Transport Order data.

In this section

- Transport Request Load Planning
- Truck Load Management
- Driver Load Management
- Visual Scheduler



Choose the planning view that matches the dispatcher question

You can configure several planning views; the right view depends on the operational question.

Planner question	Best workspace	Primary setup dependency
Which released requests still need a truck?	Transport Request Load Planning	Released requests; number series; carriers / vehicles / routes
What should this truck carry in this time slot?	Truck Load Management	Truck Load Time Slot Profile; vehicles; capacity controls
Which driver can take this work?	Driver Load Management	Drivers; default vehicles; time-slot profile
How does the plan look over time?	Visual Scheduler	Scheduler resources; planning period; sort / block flags

Planning views stay connected through the same Transport Requests and Transport Orders





Transport Request Load Planning

Request-first planning works best when dispatchers start from the pool of released requests.

BEFORE

Transport Requests must be Released. Core setup must have Transport Request and Transport Order number series. Create vehicles, carriers, routes, and compartments if your planning process depends on them.

HOW

Set the planning period, select pending requests, choose an existing Transport Order / compartment, or create a new Transport Order from selected requests.

WHY

This view is ideal for consolidating demand, moving requests between loads, and building one load from many source documents.

Use this when planners think “requests first.”

Pending Transport Requests

No. 1	Planning Base Date	Load Date	Unload Date	Route No.	Route sequence	Delivery Schedule	Total Gross Weight	Total Volume	Transport Conditions
TRO-188	2/26/2026	3/2/2026	3/24/2026	ROUTE1	3	MT	39.79	0	Not Food
TRO-193	3/9/2026	3/12/2026	3/12/2026	ROUTE1	3	MT	1	0	Food
TRO-194	3/9/2026	3/11/2026	3/11/2026	ROUTE1	3	MT	1.5	0	Frozen
TRO-245	3/31/2026	3/31/2026	3/31/2026		0		5	0	Food

Transport Order Planning

Transport Order / Compartment / Request	Status	Transport Conditions	Planning Date	Route No.	Route Sequence	Delivery Schedule	Planning Base Date	Shipper Name
DLV-017	Open		4/8/2024					
DLV-022	Open		4/9/2024					
DLV-024	Open		1/9/2026					
DLV-025	Open	Frozen	1/9/2026					
DLV-028	Open		1/5/2026	ROUTE1				
DLV-029	Open		2/4/2026	ROUTE1				
DLV-032	Open							
DLV-035	Released		4/8/2024					
DLV-039	Open			ROUTE2				
DLV-043	Open	Frozen	4/8/2024					
DLV-044	Open		3/23/2026					
DLV-047	Open		3/31/2026					
DLV-049	Open							
DLV-050	Open	Frozen	3/31/2026					
DLV-051	Open	Frozen						

Transport Request Load Planning worksheet



Truck Load Management

Truck-first planning builds loads by vehicle, planning date, and time slot.

Setup prerequisites

- Set Truck Load Time Slot Profile on Shipper TMS Setup.
- Create vehicles with carrier, vehicle unit type, depot, capacity, and default driver when used.
- Create drivers if Require Driver Before Release is enabled.
- Release Transport Requests so they can appear as candidates.
- Configure capacity controls, compartments, and transportation conditions before go-live if they are release blockers.

Main actions: Create Load → Add to Selected Truck → Open Transport Order → Release Load.

The screenshot displays the 'Truck Load Management' interface in Dynamics 365 Business Central. It includes a top navigation bar with 'Dynamics 365 Business Central' and user information. Below the navigation bar, there are filter controls for 'Planning Date From' (4/20/2026), 'Planning Date To' (4/26/2026), 'Time Slot' (MORNING), 'Depot', 'Carrier', and 'Candidates' (All With Reasons). Action buttons include 'Previous Period', 'Set Planning Period', 'Next Period', 'Create Load', 'Show Selected Truck', and 'Add to Selected Truck'. The main area contains a table with columns: Planning Date, Time Slot, Vehicle No. 1, Vehicle Name, Depot, Driver Name, Status, Next Step, and Transport No. Below this is a section for 'Eligible Transport Requests' with columns: Eligibility Status, Score, Transport Request No., Planning Base Date, Load Date, Unload Date, Route No., Delivery Schedule, and Transport Conditions.

Planning Date	Time Slot	Vehicle No. 1	Vehicle Name	Depot	Driver Name	Status	Next Step	Transport No.
4/20/2026	Morning dispatch	DEMO04	Demo - 04	Depot		Empty	Plan Load	-
4/20/2026	Morning dispatch	DEMO05	Demo - 05			Empty	Plan Load	-
4/20/2026	Morning dispatch	DEMO06	Demo - 06			Empty	Plan Load	-
4/20/2026	Morning dispatch	DEMO07	Demo - 07			Empty	Plan Load	-
4/20/2026	Morning dispatch	DEMO08	Demo - 08			Empty	Plan Load	-
4/20/2026	Morning dispatch	IVECO	Iveco		John Robinson	Empty	Plan Load	-
4/20/2026	Morning dispatch	TEST2	Test vehicle			Empty	Plan Load	-
4/20/2026	Morning dispatch	V1	Truck 1			Empty	Plan Load	-
4/20/2026	Morning dispatch	V2	Truck 2			Empty	Plan Load	-
4/21/2026	Morning dispatch	DEMO04	Demo - 04	Depot		Empty	Plan Load	-
4/21/2026	Morning dispatch	DEMO05	Demo - 05			Empty	Plan Load	-
4/21/2026	Morning dispatch	DEMO06	Demo - 06		Oleg Lobakov	Empty	Plan Load	-
4/21/2026	Morning dispatch	DEMO07	Demo - 07			Empty	Plan Load	-
4/21/2026	Morning dispatch	DEMO08	Demo - 08			Empty	Plan Load	-
4/21/2026	Morning dispatch	IVECO	Iveco		John Robinson	Empty	Plan Load	-

Eligibility Status	Score	Transport Request No.	Planning Base Date	Load Date	Unload Date	Route No.	Delivery Schedule	Transport Conditions
Blocked		TRO-242	4/20/2026	4/23/2026	4/23/2026	ROUTE1	MT	Not Food
Blocked		TRO-243	4/20/2026	4/23/2026	4/23/2026	ROUTE1	MT	Not Food
Blocked		TRO-244	4/20/2026	4/23/2026	4/23/2026	ROUTE1	MT	Not Food

Truck Load Management worksheet



Driver Load Management

Driver-first planning helps dispatchers keep drivers, vehicles, and linked loads aligned.

- Maintain driver cards with carrier and default vehicle.
- Maintain vehicle cards so a driver slot can inherit the correct vehicle and capacity context.
- Use the same Truck Load Time Slot Profile to align truck and driver slots.
- Review assigned vehicle, linked Transport Order, load %, conflict count, and blocked scheduling flags.
- Resolve double booking, unavailable drivers, or driver-to-vehicle conflicts before releasing the load.

Driver Load Management worksheet

Planning Date	Driver No.	Driver Name	Default Vehicle	Assigned Vehicle
4/20/2024	4104-1004	Chag Lohabani	Vehicle	
4/20/2024	4104-1004	Chag Lohabani	Vehicle	
4/21/2024	4104-1004	Chag Lohabani	Vehicle	Demco - 08
4/21/2024	4104-1004	Chag Lohabani	Vehicle	
4/22/2024	4104-1004	Chag Lohabani	Vehicle	
4/22/2024	4104-1004	Chag Lohabani	Vehicle	Demco - 08
4/23/2024	4104-1004	Chag Lohabani	Vehicle	Demco - 08
4/23/2024	4104-1004	Chag Lohabani	Vehicle	
4/24/2024	4104-1004	Chag Lohabani	Vehicle	
4/24/2024	4104-1004	Chag Lohabani	Vehicle	
4/25/2024	4104-1004	Chag Lohabani	Vehicle	
4/25/2024	4104-1004	Chag Lohabani	Vehicle	
4/26/2024	4104-1004	Chag Lohabani	Vehicle	
4/26/2024	4104-1004	Chag Lohabani	Vehicle	

Driver conflict details

Driver No.	Carrier ID	Carrier Name	Conflict Count	Conflict Date	Notes
4104-1004	00000000000000000000	00000000000000000000	1		Driver is blocked for vehicles.



Visual Scheduler

Timeline planning is useful when the team needs to see demand and planned loads across a day, week, or month.

SETUP

Set scheduler time slots and maintain resources such as carriers, vehicles, drivers, routes, consignees, shippers, and transport conditions. Use Scheduler Sort Order and Block for Scheduling where available.

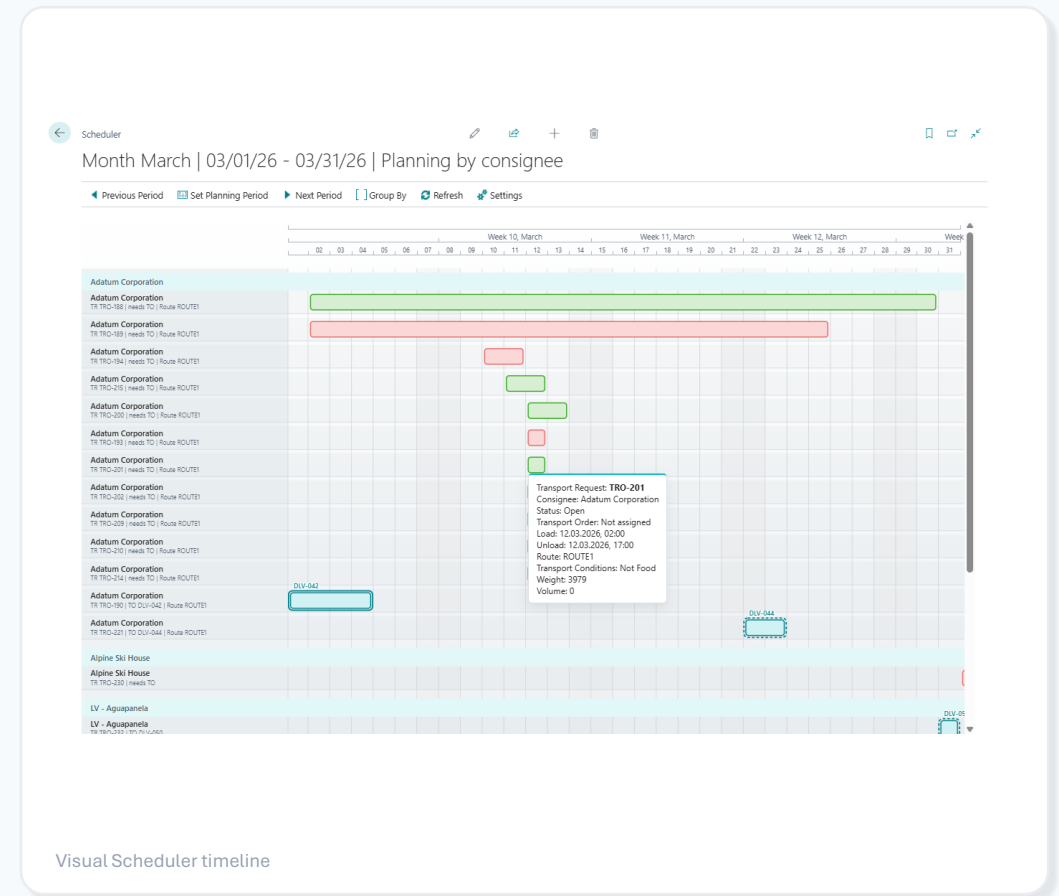
HOW

Choose the planning period and grouping dimension, then review, reschedule, or regroup work directly from the timeline.

WHY

Visual scheduling helps planners spot timing gaps, overloaded periods, missing assignments, and delivery-window problems faster than list pages.

Use this when planners think “timeline first.”





Candidate reasons and release checks

The planning pages should explain why a request fits, needs review, or is blocked.

Common setup blockers

- No linked Transport Order, or the order is not Open.
- No Transport Requests on the selected load.
- Driver required by setup but missing on the order.
- Vehicle, driver, or slot conflict exists.
- Load exceeds weight, volume, footage, or logistic-unit capacity.
- Compartment or transportation-condition compatibility fails.

Make candidate reasons part of UAT: they prove that master data and controls are configured correctly.

Candidate reasons

The screenshot shows the 'Truck Load Management' page in Dynamics 365 Business Central. It features a filter section at the top with 'Planning Date From' and 'Time Slot' set to 'MORNING'. Below the filters is a table with columns for 'Planning Date', 'Time Slot', 'Vehicle No. 1', 'Vehicle Name', 'Driver', 'Driver Name', 'Status', and 'Next Step'. The table contains multiple rows of data, some with 'Plan Load' and others with 'Not Found' or 'Not Found' in the 'Next Step' column. Below the table is an 'Eligible Transport Requests' section with a table showing 'Request No.', 'Status', 'Transport', 'Planning', 'Load Date', 'Original Date', 'Route No.', 'MT', and 'Transport Conditions'.

Slot status legend

This screenshot is identical to the one above, showing the 'Truck Load Management' page in Dynamics 365 Business Central. It displays the same filter settings, table of planning data, and 'Eligible Transport Requests' section.



Carrier selection and freight cost setup

Enable rate-driven carrier comparison and Business Central item-charge allocation only after carriers, rates, mappings, and item charges are ready.

In this section

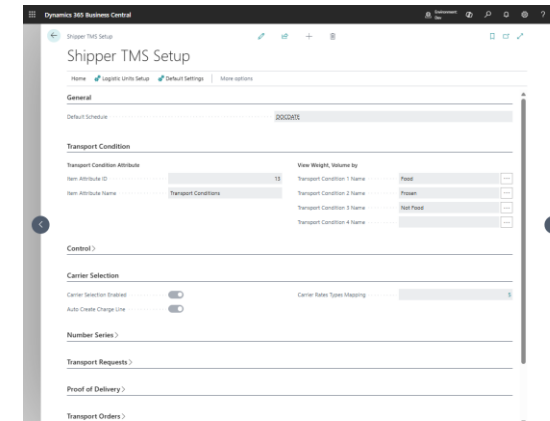
- Carrier selection enablement
- Carrier rates
- Rate type mapping
- Transport charges and allocation



Carrier Selection setup

Carrier Selection compares available carriers and can create charge lines from the selected option.

- 1 Create carriers and maintain their addresses / route points.
- 2 Create carrier rates with geography, equipment, and rate details.
- 3 Create Carrier Rate Type Mapping so rate components become Business Central item charges.
- 4 Turn on Carrier Selection Enabled in Shipper TMS Setup.
- 5 Turn on Auto Create Charge Line when selected rate options should create Transport Charge lines automatically.



Carrier Selection settings on Shipper TMS Setup

Document No.	Carrier No.	Carrier Name	Comment	Rate Type	Rate	Return	Drop Amount	Total Amount	Drops
DLV-002	CARRIER 1	Carrier 1		Rate Cac	0.00	0.00	0.00	0.00	0
DLV-003	CARRIER 2	Carrier 2		Rate Cac	0.00	0.00	0.00	0.00	0
DLV-003	TRANSFRESH	Transfresh		Rate Cac	0.00	0.00	0.00	0.00	0
DLV-002	CARRIER 1	DPS Transport		Rate Cac	0.00	0.00	0.00	0.00	0
DLV-002	CARRIER 2	A1 Logistics		Rate Cac	0.00	0.00	0.00	0.00	0
DLV-002	CARRIER 3	FTL Cargo Trans		Rate Cac	0.00	0.00	0.00	0.00	0
DLV-002	OWNLOGISTICS	Ow Logistics		Rate Cac	0.00	0.00	0.00	0.00	0
DLV-002	TRANSFRESH	Transfresh		Rate Cac	0.00	0.00	0.00	0.00	0
DLV-004	CARRIER 2	A1 Logistics		Rate Cac	1,740.00	0.00	195.00	1,940.00	3
DLV-004	CARRIER 1	DPS Transport		Rate Cac	0.00	3,465.00	35.00	4,800.00	1
DLV-004	CARRIER 3	FTL Cargo Trans		Rate Cac	0.00	3,465.00	14.00	3,479.00	1
DLV-004	OWNLOGISTICS	Ow Logistics		Rate Cac	0.00	0.00	0.00	0.00	0
DLV-004	TRANSFRESH	Transfresh		Rate Cac	0.00	0.00	0.00	0.00	0
DLV-003	CARRIER 2	A1 Logistics		Rate Cac	1,740.00	0.00	65.00	1,805.00	1
DLV-003	CARRIER 1	DPS Transport		Rate Cac	0.00	3,465.00	0.00	3,465.00	0
DLV-003	CARRIER 3	FTL Cargo Trans		Rate Cac	0.00	6,260.00	0.00	6,260.00	0
DLV-003	OWNLOGISTICS	Ow Logistics		Rate Cac	0.00	0.00	0.00	0.00	0
DLV-003	TRANSFRESH	Transfresh		Rate Cac	0.00	0.00	0.00	0.00	0
DLV-008	CARRIER 2	A1 Logistics		Rate Cac	1,740.00	0.00	195.00	1,935.00	2
DLV-008	CARRIER 1	DPS Transport		Rate Cac	0.00	3,790.00	30.00	3,820.00	1
DLV-008	CARRIER 3	FTL Cargo Trans		Rate Cac	0.00	4,940.00	0.00	4,940.00	1
DLV-008	OWNLOGISTICS	Ow Logistics		Rate Cac	0.00	0.00	0.00	0.00	0

Carrier Selection results



Carrier Rates

Carrier rates are the rate card data used for cost comparison and selected carrier options.

Maintain rate dimensions

- Carrier and rate type
- Origin / destination geography, route, zone, or MAP Location constraints
- Mode of transport, vehicle unit type, equipment, service window, or effective dates where relevant
- Cost amount, currency, minimums, distance or load-based rules
- Start / end MAP locations when carrier route points affect route cost or distance

Keep rates testable: use one simple lane first, then add geography and constraints after the base flow works.

Carrier Rates

Carrier No	Carrier Name	From	To	Rate	Unit	Min	Max	Rate	Unit	Min	Max	
CARRIER 1	Carrier 1	US	TX	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
CARRIER 1	Carrier 1	US	WA	1,750.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
CARRIER 2	Carrier 2	US	TX	1,745.00	0.00	0.00	0.00	0.00	0.00	0.00	45.00	
CARRIER 2	Carrier 2	US	WA	0.00	0.00	1.75	0.00	0.00	0.00	0.00	60.00	
CARRIER 3	CARRIER 3	US	NC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
CARRIER 3	CARRIER 3	US	NC	2,500.00	0.00	0.00	0.00	0.00	0.00	0.00	30.00	
CARRIER 3	CARRIER 3	US	TX	0.00	0.00	0.00	1.40	0.00	0.00	0.00	30.00	
CARRIER 3	CARRIER 3	US	TX	0.00	0.00	4.00	0.00	0.00	0.00	0.00	30.00	
CARRIER 3	CARRIER 3	US	WA	0.00	0.00	3.00	0.75	0.00	0.00	0.00	30.00	
DRILLDOWN	Drill-down			0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
TRANSITRES	Transitres	US	FL	Miami	US-FL	US	New York	US-NY	2,500.00	40.00	0.00	140.00

Geographic fields and rate constraints

Carrier No	Carrier Name	From	To	Rate	Unit	Min	Max	Rate	Unit	Min	Max	
CARRIER 1	Carrier 1	US	TX	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
CARRIER 1	Carrier 1	US	WA	1,750.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
CARRIER 2	Carrier 2	US	TX	1,745.00	0.00	0.00	0.00	0.00	0.00	0.00	45.00	
CARRIER 2	Carrier 2	US	WA	0.00	0.00	1.75	0.00	0.00	0.00	0.00	60.00	
CARRIER 3	CARRIER 3	US	NC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
CARRIER 3	CARRIER 3	US	NC	2,500.00	0.00	0.00	0.00	0.00	0.00	0.00	30.00	
CARRIER 3	CARRIER 3	US	TX	0.00	0.00	0.00	1.40	0.00	0.00	0.00	30.00	
CARRIER 3	CARRIER 3	US	TX	0.00	0.00	4.00	0.00	0.00	0.00	0.00	30.00	
CARRIER 3	CARRIER 3	US	WA	0.00	0.00	3.00	0.75	0.00	0.00	0.00	30.00	
DRILLDOWN	Drill-down			0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
TRANSITRES	Transitres	US	FL	Miami	US-FL	US	New York	US-NY	2,500.00	40.00	0.00	140.00



Carrier Rate Type Mapping

Mappings connect rate components to the Business Central item charges used in transport cost accounting.

Concept	Why it matters
Rate Type	Classifies carrier quote components such as freight, fuel, handling, waiting, or accessorial cost.
Item Charge	The Business Central object used to allocate freight cost to transported item lines.
Auto Create Charge Line	Uses the mapping to create Transport Charge lines when a carrier option is selected.

- Carrier Selection readiness checks require at least one mapping when Carrier Selection is enabled.
- Change mappings when finance changes which item charges represent freight cost components.

The screenshot shows the Dynamics 365 Business Central interface for the 'Carrier Rate Type Mapping' list. The header includes the company name 'CRONUS UK Ltd.' and navigation menus for Finance, Cash Management, Sales, Purchasing, Shipper TMS, TMS, and Shopify. The main table displays the following data:

Carrier Rate Type 1	Item Charge No.	Item Charge Description
Rate	P-ALLOWANCE	Purchase Allowance
Load	P-RESTOCK	Purchase Restock Charge
Unload	S-ALLOWANCE	Sales Allowance
Return	JB-FREIGHT	Freight Charge (JB-Spedition)
Flat Fee	S-ALLOWANCE	Sales Allowance

Carrier Rate Type Mapping list



Transport Charges and allocation defaults

Shipper TMS uses Business Central item charges to allocate freight cost back to transported source documents.

- 1 Create Business Central Item Charges for freight-related costs.
- 2 Use Carrier Rate Type Mapping when carrier-rate components should create charge lines automatically.
- 3 Set Default Charge Assignment Type for distributing carrier charges across orders / requests.
- 4 Set Default Item Charge Assignment Type for distributing cost within order item lines.
- 5 During processing, link carrier purchase invoice item-charge lines to the Transport Order, then assign cost by distance, weight, volume, units, equally, or manual rules.

The screenshot displays the 'Transport Order' interface for 'DLV-014'. It shows a table of 'Route Steps and Actions' with columns for Sequence, Action, Name, Request No., Address, Date, Date, City, and Request Description. Below this is a 'Load Summary' section with fields for Distance, No. of Stops, Components, Weight, Capacity, Volume, and Load %. A 'Charges' section is visible at the bottom, showing a table with columns for Type, Charge No., Description, Customer/Order Name, and Quantity.

Transport Charges

The screenshot displays the 'Transport Charges Assignment' interface. It features a table with columns for Shipper Name, Company Name, Distance, Weight, Volume, Package, No. of Stops, Amount to Assign, Transport Request No., and Request Description. Below the table is a summary section with columns for Charge, To Assign, Assigned, and Rem. to Assign.

Charge allocation lines



Execution, warehouse, reports, and integrations

Complete the operational layer after planning and freight-cost setup are stable.

In this section

- Warehouse document creation
- Reports and CMR numbering
- Proof of delivery and history
- Telematics and API access



Warehouse document creation

Transport Orders can create Business Central warehouse documents when the location setup requires warehouse handling.

Prerequisites

- Transport Order must be Released.
- Outbound shipment: shipper is a Business Central location that requires shipment handling.
- Inbound receipt: consignee is a Business Central location that requires receipt handling.
- Source lines must still be eligible for warehouse shipment or warehouse receipt.
- Existing warehouse documents are opened instead of duplicated.

Transport Order remains the transport document; warehouse shipment / receipt remains the warehouse execution document.

Warehouse document actions

Created warehouse document



Reports, CMR, and print-ready documents

Set document numbers and report defaults so dispatch paperwork is available at release time.

Setup action / field	Purpose
CMR Nos.	Number CMR documents printed from Transport Orders.
Set default reports	Restore standard report selection setup after installation or upgrade.
Split Delivery Note by Transport Condition	Separate Delivery Note By Drop output by cargo condition when paperwork should not be combined.

- Validate print actions with real source-document examples before go-live.
- Review whether condition-specific delivery notes are required for frozen, ambient, hazmat, or other separated cargo.

The screenshot shows the Dynamics 365 Business Central interface for a Transport Order (DLV-020). The top navigation bar includes 'Home', 'Prepare', 'Route', 'Warehouse', 'Print', 'Other', 'Telematics', and 'More options'. Below this, there are tabs for 'Loading Manifest', 'Packing List', 'Bill Of Lading', 'Delivery Note', 'Summary Delivery Notes', 'Returns', and 'CMR Blank'. The main content area is divided into several sections:

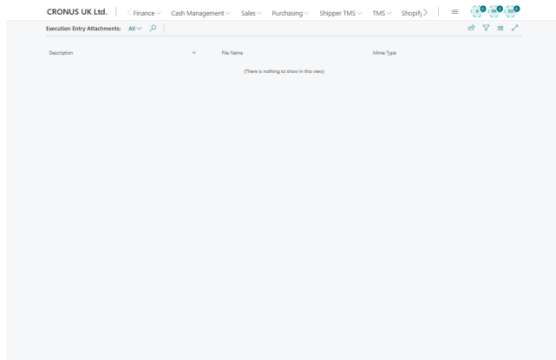
- Schedule:** Delivery Schedule (MONDAY), Document Date (12/24/2025), Route No. (ROUTE1), Carrier (Transtresh), Driver Name (Alfred Dokins).
- Status:** Open
- Vehicle:** Vehicle Name, Vehicle Type (TRUCKANDTRAILER), Vehicle Type Description (Truck & Trailer), Transport Conditions.
- Vehicle Compartments:** A table showing compartments with columns for Code 1, Description, Max Payload Weight, Internal Volume, and Transport Conditions. The table lists 'SEMITRAILER' (Semi-trailer) and 'TRAILER' (Trailer).
- Route Stops and Actions:** A section for managing route stops.
- Totals:** A summary row showing '185.87' and '2 hours 44 minutes'.
- Charges:** A section for managing charges with options for 'Purchase', 'Sale', 'Assignment', and 'Functions'.
- Load Summary:** A sidebar on the right providing an overview of the load, including 'No. of Drops' (6), 'Compartments' (0 / 2 loaded), 'Weight' (Capacity: 20,000.00, Loaded: 211.05, Available: 19,788.95, Load %: 1.1), and 'Volume' (Capacity: 0.00, Loaded: 0.00, Available: 0.00, Load %: 0.0).

At the bottom of the interface, there is a section for 'Transport Order report actions' with a table for selecting reports to print.



Execution facts, PoD evidence, and posted history

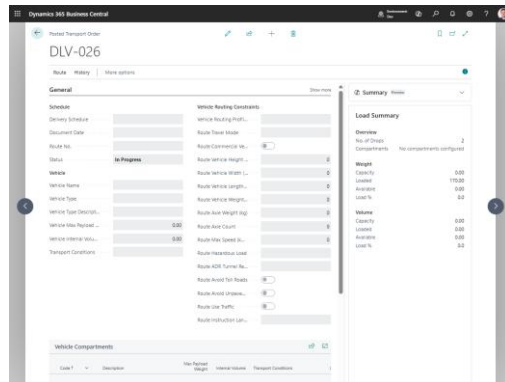
Posted Transport Orders preserve route, resources, charges, execution entries, and proof attachments.



Execution entry with proof attachment

Configure before testing PoD

- Enable Proof of Delivery in Shipper TMS Setup.
- Create a Transport Execution Status Profile with operational execution states.
- Decide which roles or integrations create execution entries.
- Test attachments, signatures, coordinates, and exception notes if used.
- Post a test Transport Order and confirm execution history remains available in posted records.



Posted Transport Order



Telematics provider setup

Connect Business Central dispatch with Geotab, Samsara, or Webfleet when fleet visibility is required.

- 1 Search for Telematics Setup and create a setup record.
- 2 Fill Code, Description, Provider, and Enabled when ready.
- 3 Enter provider connection fields such as Base URL, Account ID, Database Name, User Name, and secret/token.
- 4 Turn on the sync streams your company uses: vehicles, drivers, zones, positions, trips, routes / dispatches, assets, HOS / ELD, events, diagnostics, fuel, or sensors.
- 5 Test the connection and review the log before assigning the setup to carriers.

Telematics Setup card

Provider connection fields



Telematics entity mapping

Mapping connects provider vehicles, drivers, zones, and map locations to internal Shipper TMS records.

Provider entity	Internal record
Vehicle	Vehicle
Driver	Driver
Zone / geofence	Zone
Stop / location	MAP Location

- Sync provider master data first, then map each external ID to the correct internal record.
- Carrier card → Telematics Setup Code connects a carrier to a provider account.
- Avoid duplicate mappings for the same setup and entity type.
- Keep blocked vehicles and drivers out of dispatch tests.

The screenshot shows the Dynamics 365 Business Central interface for 'CRONUS UK Ltd.' with the 'Telematics Entity Mappings' page open. The table displays the following columns: Telematics Setup Code, Entity Type, External ID, External Name, Internal No., Internal Table ID, Internal Systemid, Auto Ma., and Last Synced At. The data includes various vehicle and trip records, such as:

Telematics Setup Code	Entity Type	External ID	External Name	Internal No.	Internal Table ID	Internal Systemid	Auto Ma.	Last Synced At
GEOTABDEMO	Vehicle	b1	Demo - 01	V1	73110585	{bc38478-191f-f111-8340-70...}		3/31/2026 7:2
GEOTABDEMO	Vehicle	b2	Demo - 02	V2	73110585	{5d8ea82-191f-f111-8340-70...}		3/31/2026 7:2
GEOTABDEMO	Vehicle	b3	Demo - 03	IVECO	73110585	{b23572b4-2901-f111-8405-60...}		3/31/2026 7:2
GEOTABDEMO	Vehicle	b4	Demo - 04	DEMO04	73110585	{65b061e3-242d-f111-bec2-7c...}		3/31/2026 7:2
GEOTABDEMO	Vehicle	b5	Demo - 05	DEMO05	73110585	{66b061e3-242d-f111-bec2-7c...}		3/31/2026 7:2
GEOTABDEMO	Vehicle	b6	Demo - 06	DEMO06	73110585	{67b061e3-242d-f111-bec2-7c...}		3/31/2026 7:2
GEOTABDEMO	Vehicle	b7	Demo - 07	DEMO07	73110585	{38b79006-342d-f111-bec2-60...}		3/31/2026 7:2
GEOTABDEMO	Vehicle	b8	Demo - 08	DEMO08	73110585	{fe1968fe-332d-f111-bec2-604...}		3/31/2026 7:2
GEOTABDEMO	Vehicle	b9	Demo - 09		0	{00000000-0000-0000-0000-00...}		3/31/2026 7:2
GEOTABDEMO	Vehicle	bA	Demo - 10		0	{00000000-0000-0000-0000-00...}		3/31/2026 7:2
GEOTABDEMO	Trip	b11	b11		0	{00000000-0000-0000-0000-00...}		3/20/2026 1:0
GEOTABDEMO	Trip	b12	b12		0	{00000000-0000-0000-0000-00...}		3/20/2026 1:0
GEOTABDEMO	Trip	b13	b13		0	{00000000-0000-0000-0000-00...}		3/20/2026 1:0
GEOTABDEMO	Trip	b14	b14		0	{00000000-0000-0000-0000-00...}		3/20/2026 1:0
GEOTABDEMO	Trip	b15	b15		0	{00000000-0000-0000-0000-00...}		3/20/2026 1:0
GEOTABDEMO	Trip	b16	b16		0	{00000000-0000-0000-0000-00...}		3/20/2026 1:0
GEOTABDEMO	Trip	b18	b18		0	{00000000-0000-0000-0000-00...}		3/20/2026 1:0
GEOTABDEMO	Trip	b19	b19		0	{00000000-0000-0000-0000-00...}		3/20/2026 1:0
GEOTABDEMO	Trip	b1A	b1A		0	{00000000-0000-0000-0000-00...}		3/20/2026 1:0
GEOTABDEMO	Trip	b4057	b4057		0	{00000000-0000-0000-0000-00...}		3/20/2026 1:0
GEOTABDEMO	Trip	b4058	b4058		0	{00000000-0000-0000-0000-00...}		3/20/2026 1:0
GEOTABDEMO	Trip	b4059	b4059		0	{00000000-0000-0000-0000-00...}		3/20/2026 1:0
GEOTABDEMO	Trip	b405A	b405A		0	{00000000-0000-0000-0000-00...}		3/20/2026 1:0
GEOTABDEMO	Trip	b405B	b405B		0	{00000000-0000-0000-0000-00...}		3/20/2026 1:0
GEOTABDEMO	Trip	b405C	b405C		0	{00000000-0000-0000-0000-00...}		3/20/2026 1:0

Telematics Entity Mapping



Telematics dispatch, sync, and logs

Publish Transport Orders to the provider, then review dispatch status and inbound facts.

- 1 Confirm the carrier has a Telematics Setup Code.
- 2 Confirm the setup is enabled and credentials are valid.
- 3 Confirm vehicle and driver mappings exist when the provider requires them.
- 4 Open the Transport Order and choose Publish to Telematics.
- 5 Review Telematics Dispatches, Log Entries, Inbound Messages, Sync States, and Sync Locks when troubleshooting.

Common fixes: credentials, entity mappings, route stop addresses, provider webhook registration, or stale sync locks.

Transport Order No.	Transport Order Name	Provider	Current Status	Status	Status Reason	New Count	New Date	Received On	Processed On	Processed Count
			Pending							

Dispatch log

Entry No.	Transport Order No.	Transport Order Name	Provider	Current Status	Status	Status Reason	New Count	New Date	Received On	Processed On	Processed Count
7	6075422040	Genial	Veritas	Full	Duplicate	Not Applicable	0	3/11/2024 10:28	3/11/2024 10:28	0	
8	6075422040	Genial	Veritas	Full	Processed	Not Applicable	0	3/11/2024 10:28	3/11/2024 10:28	0	
9	6075422040	Genial	Veritas	Full	Processed	Not Applicable	0	3/11/2024 10:28	3/11/2024 10:28	0	
10	6075422040	Genial	Veritas	Full	Processed	Not Applicable	0	3/11/2024 10:28	3/11/2024 10:28	0	
11	6075422040	Genial	Veritas	Full	Processed	Not Applicable	0	3/11/2024 10:28	3/11/2024 10:28	1	
12	6075422040	Genial	Veritas	Full	Duplicate	Not Applicable	0	3/11/2024 10:28	3/11/2024 10:28	0	
13	6075422040	Genial	Veritas	Full	Processed	Not Applicable	0	3/11/2024 10:28	3/11/2024 10:28	0	
14	6075422040	Genial	Veritas	Full	Processed	Not Applicable	0	3/11/2024 11:15	3/11/2024 11:15	1	
15	6075422040	Genial	Veritas	Full	Duplicate	Not Applicable	0	3/11/2024 11:15	3/11/2024 11:15	0	
16	6075422040	Genial	Veritas	Full	Duplicate	Not Applicable	0	3/11/2024 11:15	3/11/2024 11:15	0	
17	6075422040	Genial	Veritas	Full	Duplicate	Not Applicable	0	3/11/2024 11:15	3/11/2024 11:15	0	
18	6075422040	Genial	Veritas	Full	Processed	Not Applicable	0	3/11/2024 11:15	3/11/2024 11:15	1	
19	6075422040	Genial	Veritas	Full	Processed	Not Applicable	0	3/11/2024 11:15	3/11/2024 11:15	0	
20	6075422040	Genial	Veritas	Full	Processed	Not Applicable	0	3/11/2024 11:15	3/11/2024 11:15	1	
21	6075422040	Genial	Veritas	Full	Processed	Not Applicable	0	3/11/2024 11:15	3/11/2024 11:15	1	
22	6075422040	Genial	Veritas	Full	Duplicate	Not Applicable	0	3/11/2024 11:15	3/11/2024 11:15	0	

Inbound messages



API and integration setup

Use Business Central API pages for external systems, carrier portals, mobile apps, or reporting integrations.

API identity	Value
Publisher	extensionslab
API group	stms
Version	v1.0

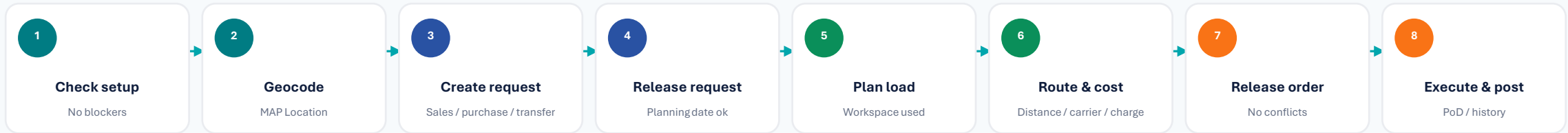
Permission sets

- Shipper TMS - API for general integration accounts.
- Shipper TMS - Tel. API for telematics webhooks and provider data exchange.
- Shipper TMS - Tel. Admin API for provider administration actions only.
- Use Microsoft Entra ID / OAuth 2.0 and keep service-account permissions minimal.



End-to-end validation script

Run a dry test before go-live so setup gaps appear while the team can still adjust configuration.



Expected result

- No setup validation error appears.
- Test documents receive numbers from the configured series.
- Distance and duration update after routing actions.
- Planning page shows requests / slots in the expected period.
- Release blocks only the business issues you intentionally configured.
- Posted history, charges, warehouse docs, reports, PoD, and telematics logs appear when those features are in scope.

Transport Order: DLV-014

Home Prepare Route Warehouse Print Other Telematics More options

General Show more

Schedule: MONDAY Status: Open

Delivery Schedule: MONDAY Vehicle:
 Document Date: 12/16/2025 Vehicle Name:
 Route No.: ROUTE2 Vehicle Type:
 Carrier: Transtresh Vehicle Type Descript...:
 Driver Name: Transport Conditions:

Route Stops and Actions New Line Delete Line Move Up Move Down

Sequence	Action	Name	Waypoint No.	Address	Post Code	City	Waypoint Description
100	LOAD		M0000041				Warehouse in Montreal
200	LOAD		M0000041				Warehouse in Montreal
300	LOAD		M0000041				Warehouse in Montreal
400	UNLOAD		M0000042				Village des Valeurs
500	UNLOAD		M0000039				IGA Ltd
600	UNLOAD		M0000040				Central Warehouse

Totals > 0.00

Charges >

Additional >

Load Summary Summary Review

Overview

No. of Drops: 3

Compartments: No compartments configured

Weight

Capacity: 0.00

Loaded: 1,073.50

Available: 0.00

Load %: 0.0

Volume

Capacity: 0.00

Loaded: 0.00

Available: 0.00

Load %: 0.0

Transport Order route and assignments



Troubleshooting matrix

Most setup issues show up as missing records, missing provider credentials, or mismatched planning controls.

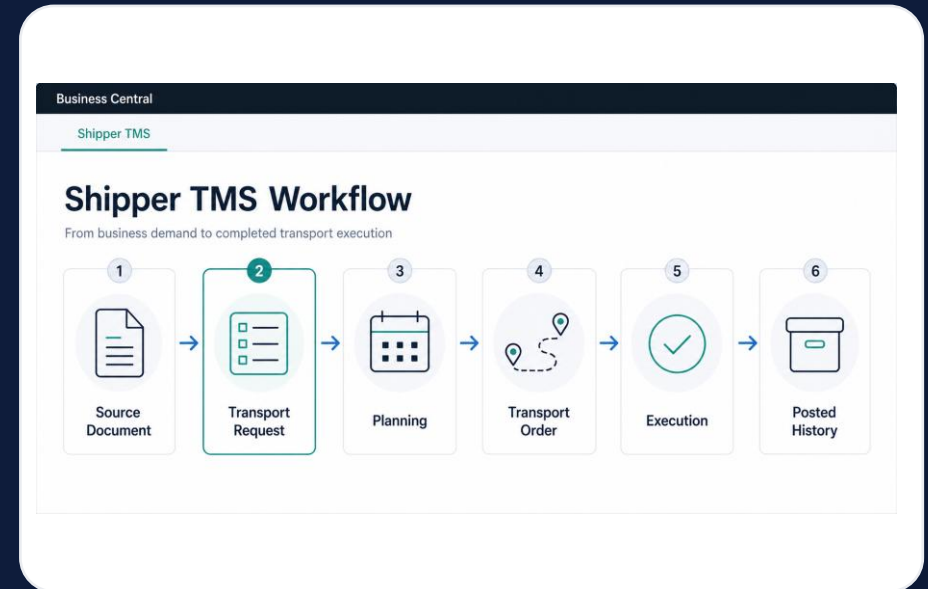
Symptom	First things to check
Transport Request / Order cannot be created	Number series, source document status, planning date, permissions, license.
Distance or route does not update	Map provider selection, key, coordinates, distance matrix, route stop order.
Truck slots are missing	Planning period, Truck Load Time Slot Profile, vehicles, depot, filters, blocked scheduling.
Candidate is blocked	Capacity data, conditions, compartments, time slot, route, driver, vehicle availability.
Carrier Selection does not show options	Carrier Selection Enabled, carrier rates, rate type mapping, geography, map locations.
Charge line not created	Auto Create Charge Line, Carrier Rate Type Mapping, Business Central item charge.
Telematics publish fails	Carrier setup code, enabled provider setup, credentials, mappings, route stops, logs.

Ownership tip: assign one setup owner for master data, one for planning controls, one for finance / charges, and one for maps / telematics credentials.



Ready for planning

A Shipper TMS setup is complete when Transport Requests can be created, Transport Orders can be planned, routed, costed, released, executed, and posted without setup blockers.



Core setup sequence

Access → Core setup → Maps → Master data → Planning → Freight cost → Execution → Validation