

User Manual

Aptean Food and Beverage ERP

Aptean Routing and Scheduling

Product Documentation



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Release notes

Article • 1/28/2026 • 1 min read

To view what's new or changed in each release of the Aptean Routing and Scheduling extension, select the specific release version.

Date	Release version	Description
January 2026	2601.0.0.0	Feature release
October 2025	2504.0.0.0	Feature release
August 2025	2503.1.0.0	Stability release
July 2025	2503.0.0.0	Feature release
July 2025	2502.0.0.0	Feature release
March 2025	2501.0.0.0	Initial release



2601.0.0.0

Release Note • 1/28/2026 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean EAM connector. For more information, see [Highlights of EAM, version 2601.0.0.0](#).



2504.0.0.0

Release Note • 10/22/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Routing and Scheduling extension, the *targetSchema* parameter has been added to subscription adjustments to specify the schema version (*schema-only-ras-scheduleimport-v1*) that the target system uses for schedule import events.



2503.1.0.0

Release Note • 8/27/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Routing and Scheduling extension, the translation file for the Swedish (sv-SE) language has been updated with standard texts for better readability.



2503.0.0.0

Release Note • 7/30/2025 • 1 min read

Features

With the feature added in this release of the Aptean Routing and Scheduling extension, you can execute the **Configure with AIP** action on the **Routing And Scheduling Setup** page to connect with the [Aptean Integration Platform](#). When the Aptean [POD Integration Connector](#) is installed, the system sends a request to AIP to subscribe to events for the Proof of Delivery (POD) and Routing and Scheduling (RAS) products for the current tenant, and maps the products, definition types, and event subscriptions in one step.

Enhancements/Modifications

With this release of the Aptean Routing and Scheduling extension, the system updates the **Location Code** field value on the **General** FastTab of the transport order based on the location of the transport line when the location code is the same across all lines or when only one line exists. If multiple transport lines have different location codes, the **Location Code** field in the header is set to blank.

UI/UX changes

The **Configure with AIP** action has been added to the **Routing And Scheduling Setup** page.



2502.0.0.0

Release Note • 7/2/2025 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean POD Integration Connector. For more information, see [Highlights of POD Integration Connector, version 2501.0.0.0](#).

Integrations

The Aptean Routing and Scheduling extension has been integrated with the Aptean [POD Integration Connector](#). To know more, see [Integrations](#).



2501.0.0.0

Release Note • 3/12/2025 • 1 min read

Features

With this release of the Aptean Routing and Scheduling extension, you can:

- Synchronize routing and scheduling processes between Business Central and external systems via the [Aptean Integration Platform](#) connector.
- Optimize routing and scheduling workflows within Business Central documents for improved efficiency and automation.
- Set up routing and scheduling, and shipment methods to ensure streamlined logistics management. For more information, see [Set up routing and scheduling](#) and [Set up shipment methods](#).
- Manage sales, purchase, return, and transfer orders with enhanced routing and scheduling functionalities. For more information, see [Manage documents](#).
- Monitor and process inbound and outbound AIP events to ensure real-time data synchronization with external systems. For more information, see [Manage AIP events](#) and [Process AIP events](#).

Integrations

The Aptean Routing and Scheduling extension has been integrated with the [Aptean Integration Platform](#) connector. For more information, see [Integrations](#).



Introduction

Article • 3/13/2025 • 1 min read

The Aptean Routing and Scheduling (RAS) extension enhances your logistics management by optimizing routing and scheduling processes within Business Central. Additionally, you can seamlessly synchronize routing and scheduling processes between Business Central and external systems by processing inbound and outbound events via the [Aptean Integration Platform](#) connector.

The key benefits of this extension are:

- Reduces manual effort by streamlining order fulfilment and logistics with automated routing and scheduling.
- Syncs routing and scheduling data with external systems via the Aptean Integration Platform extension, ensuring an accurate exchange of data.
- Provides real-time insights into routing and scheduling data for better decision-making.

Important

The [Aptean Integration Platform](#) connector is installed automatically when this extension is installed.



Setup

Article • 3/12/2025 • 1 min read

The following setups are required.

- [Manage permission sets](#)
- [Set up routing and scheduling](#)
- [Set up shipment methods](#)



Manage permission sets

Article • 3/12/2025 • 3 min read

Permission sets in Business Central define a user's access level to various features and data within this extension.

We provide the following system permission sets:

- Direct
- Indirect

Direct permission sets

Users with this permission set can perform specific actions directly without requiring additional approvals or workflows. These sets include permissions to read, modify, delete, and create data.

The direct permission set ID for this extension is *RAS168FDW*.

Indirect permission sets

Users with this permission set can perform specific actions. This is used in conjunction with other permission sets and typically involves additional conditions or approvals before an action can be completed.

The indirect permission set ID for this extension is *RASBASIC168FDW*.

User-defined permission sets

In addition to the system permission sets we provide, you can create new permission sets or copy system permission sets and modify or delete access to specific entities according to your requirements. For more information, see [Assign permissions to users and groups](#).

Assign a permission set

1. Select the Search icon , enter **Users**, and then choose the related link.
The **Users** list page opens.
2. Navigate to the username for which you want to assign the permission set and select it.
The **User Card** page opens.
3. On the **User Permission Sets** FastTab, in the **Permission Set** field, enter the valid permission set for this extension.
The associated fields are automatically updated based on the entered value. The user has the necessary



permissions to use the features of the Aptean Routing and Scheduling extension, ensuring secure and role-based access.



Set up routing and scheduling

Article • 3/12/2025 • 2 min read

You can set up routing and scheduling as follows:

- 1. Select the Search icon , enter **Routing And Scheduling Setup**, and then choose the related link.
The **Routing And Scheduling Setup** page opens.
- 2. On the **General** FastTab, enter the required information in the following fields:

Field	Description
Enabled	Turn on the toggle if you want the system to allow data to flow from the Aptean Routing and Scheduling extension to AIP (Aptean Integration Platform) events.
Project	Enter a project name that you want to include as a detail in the payload.
Only Import Frozen Trips	Turn on the toggle if you want to import the information of frozen trips only.

- 3. You can execute the following actions as required.

Action	Description
Process Events	Open the AIP Process Events page to process inbound and outbound events. For more information, see Process AIP events .
View Addresses	Open the Routing And Scheduling Addresses page to view all the addresses created. For more information, see Manage routing and scheduling addresses .
Routing And Scheduling Documents	Open the Routing And Scheduling Documents page to view all the documents created. For more information, see Manage routing and scheduling documents .



Set up shipment methods

Article • 3/12/2025 • 1 min read

To set up a shipment method for routing and scheduling,

- On the **Shipment Methods** page, select the **Enable for Aptean RAS** checkbox for the relevant shipment method.



Manage documents

Article • 3/12/2025 • 3 min read

Manage sales orders

You can select the relevant shipment method in the **Code** field on the **Shipping and Billing** FastTab of the **Sales Order** page.

Note

- After selecting the shipment method with the **Enable for Aptean RAS** checkbox selected, the sell-to address is not editable on the **General** FastTab of the **Sales Order** page.
- If the Aptean [Transport](#) extension is not installed or the selected shipment method has the **Require Outbound Transfer Order** checkbox cleared, the **Shipment Date** and **Location Code** field values on the sales order lines must match the corresponding values in the sales order header.

When the sales order is released, the system updates the routing and scheduling address details in the **RaS Address ID** field on the **General** FastTab of the **Customer Card** and **Ship-to Address** pages. Additionally, the system creates a record or updates an existing record on the **Routing And Scheduling Addresses** page for the customer.

Manage sales return orders

You can select the relevant shipment method in the **Code** field on the **Shipping and Billing** FastTab of the **Sales Order** page.

Note

- When selecting the **Shipment Method Code** field value, ensure that the **Require Outbound Transport Order** checkbox is selected for the shipment method.
- After selecting the shipment method with the **Enable for Aptean RAS** checkbox selected, the sell-to address is not editable on the **General** FastTab of the **Sales Return Order** page.

When the sales order is released, the system updates the routing and scheduling address details in the **RaS Address ID** field on the **General** FastTab of the **Customer Card** and **Ship-to Address** pages. Additionally, the system creates a record or updates an existing record on the **Routing And Scheduling Addresses** page for the customer.



Manage purchase orders

You can select the relevant shipment method in the **Shipment Method Code** field on the **Shipping and Payment** FastTab of the **Purchase Order** page.

Note

When selecting the **Shipment Method Code** field value, ensure that the **Require Inbound Transport Order** checkbox is selected for the shipment method.

When the purchase order is released, the system updates the routing and scheduling address details in the **RaS Address ID** field on the **General** FastTab of the **Vendor Card** and **Order Address** pages. Additionally, the system creates a record or updates an existing record on the **Routing And Scheduling Addresses** page for the vendor.

Manage purchase return orders

You can select the relevant shipment method in the **Shipment Method Code** field on the **Shipping and Payment** FastTab of the **Purchase Order** page.

Note

- The **Ship-to** field value on the **Shipping and Payment** FastTab of the **Purchase Return Order** page must be set to *Default (Vendor Address)* or *Alternate Vendor Address*.
- When selecting the **Shipment Method Code** field value, ensure that the **Require Outbound Transport Order** checkbox is selected for the shipment method.

When the purchase return order is released, the system updates the routing and scheduling address details in the **RaS Address ID** field on the **General** FastTab of the **Vendor Card** and **Order Address** pages. Additionally, the system creates a record or updates an existing record on the **Routing And Scheduling Addresses** page for the vendor.

Manage transfer orders

You can select the relevant shipment method in the **Shipment Method Code** field on the **Shipping** FastTab of the **Transfer Order** page. The system considers the location selected in the **Transfer-to Code** field on the **General** FastTab.



 Note

When selecting the **Shipment Method Code** field value, ensure that the **Require Outbound Transport Order** checkbox is selected for the shipment method.

When the transfer order is released, the system updates the routing and scheduling address details in the **RaS Address ID** field on the **General** FastTab of the **Location Card** page. Additionally, the system creates a record or updates an existing record on the **Routing And Scheduling Addresses** page for the location.

View address details

You can view the routing and scheduling address details in the **RaS Address ID** field on the **General** FastTab on the **Location Card**, **Vendor Card**, **Customer Card**, **Ship-to Address**, and **Order Address** pages.

View document details

You can select the **Routing And Scheduling Documents** action on the following pages to view all the related routing and scheduling documents.

- Purchase Orders
- Purchase Order
- Purchase Return Orders
- Purchase Return Order
- Sales Orders
- Sales Order
- Sales Return Orders
- Sales Return Order
- Transfer Orders
- Transfer Order
- Ship-to Address
- Order Address
- Posted Sales Shipments
- Posted Sales Shipment
- Posted Purchase Receipts
- Posted Purchase Receipt
- Posted Transfer Receipts



- Posted Transfer Receipt
- Posted Return Receipts
- Posted Return Receipt
- Posted Purchase Return Shipments
- Posted Purchase Return Shipment

See also

[Manage routing and scheduling documents](#)



Manage AIP events

Article • 3/13/2025 • 1 min read

When the customer, vendor, location, customer ship-to, or vendor order address records (on the **Routing and Scheduling Addresses** page) are created, modified, or deleted, the system automatically creates a corresponding event on the **AIP Events** page. You can then choose to process the event as required. For more information, see [Creation and processing of AIP events](#).

You can set up a batch to automatically process AIP events via job queue entries from the **AIP Connection Setup** page. For more information, see [Set up AIP connection](#).



Process AIP events

Article • 3/12/2025 • 1 min read

You can process inbound and outbound events to synchronize data from the Aptean Routing and Scheduling extension to external systems on the **AIP Process Events** page as follows:

- 1. On the **Routing And Scheduling Setup** page, on the action bar, select **Related > Process Events**.
The **AIP Process Events** page opens.
- 2. Enter the required information in the following fields:

Field	Description
Type	Select the type of event processing: <i>Outbound</i> , <i>Inbound</i> , or <i>Both</i> .
Product Name	Select the product ID of the consumer you want to process. This field is editable only when the Type field value is set to <i>Inbound</i> or <i>Both</i> .
Product ID	Specifies the ID of the product selected.
Operation	Select the operation of the event processing: <i>Process</i> , <i>Transfer</i> , or <i>Both</i> .

- 3. Select **OK**.
The event processing is complete.



Manage routing and scheduling addresses

Article • 3/12/2025 • 1 min read

You can view the details of the customer, vendor, location, customer ship-to, or vendor order address records in the following fields on the **Routing And Scheduling Addresses** page.

Field	Description
Entry No.	Specifies the entry number of the address assigned automatically by the system.
Address Source	Specifies the source name of the address. The available options are: • Customer • Vendor • Location • Customer Ship-To • Vendor Order Address
Address Code	Specifies the address code.
Last Shipment Date Used	Specifies the shipment date that was successfully sent.
Outbound Integration Status	Specifies the outbound export status of the document. The available options are: • <i>Sent</i>: The event has been successfully exported to the external system. • <i>Sent Errored</i>: The event was not fully processed as there were errors during the export process. • <i>Pending</i>: The event has not been sent. • <i>Pending Removal</i>: The event is marked for removal but has not been processed yet. • <i>Removed</i>: The event has been removed. • <i>Removal Errored</i>: The event was not removed as there were errors during the removal process.
Last Inbound Integration DateTime	Specifies the latest export date and time of the address.



Manage routing and scheduling documents

Article • 3/12/2025 • 2 min read

You can view the details of the routing and scheduling processes in the following fields on the **Routing And Scheduling Documents** page.

Field	Description
Integration Source Link Type	Specifies the source link type of the integration document: <i>SO</i> (Sales order) or <i>TR</i> (Transport request).
Integration Source Link ID	Specifies the source link ID of the integration document.
Document Type	Specifies the document type. The available options are: • Sales Order • Purchase Order • Sales Return Order • Purchase Return Order • Transfer Order
Document No.	Specifies the number of the associated document.
Schedule ID	Specifies the scheduled ID for the transport route on which the goods in the transport order are planned to be delivered.
Route No.	Specifies the transport route on which the goods in the transport order are planned to be delivered.
Trip No.	Specifies the code that is used to split a single source document into multiple transport requests.
Trip Drop Num	Specifies the trip drop number.
Last Shipment Date	Specifies the shipment date that was successfully sent.
Outbound Integration Status	Specifies the outbound export status of the document. The available options are: • <i>Sent</i>: The event has been successfully exported to the external system. • <i>Sent Errored</i>: The event was not fully processed as there were errors during the export process. • <i>Pending</i>: The event has not been sent.



	• <i>Pending Removal</i>: The event is marked for removal but has not been processed yet. • <i>Removed</i>: The event has been removed. • <i>Removal Errored</i>: The event was not removed as there were errors during the removal process.
Inbound Integration Status	Specifies the inbound import status of the document. The available options are: • <i>None</i>: No transport requests have been executed in the external system. • <i>Routed</i>: The system has received information about routes and trips in the imported event from the external system. • <i>Unrouted</i>: The system has not received information about routes and trips in the imported event from the external system.
Last Inbound Integration DateTime	Specifies the latest import date and time of the document.



Integrations

Article • 7/2/2025 • 1 min read

The Aptean Routing and Scheduling extension has been integrated with the following extension:

- [Aptean Integration Platform](#)
- [Aptean POD Integration Connector](#)



Aptean Integration Platform

Article • 7/30/2025 • 1 min read

You can process inbound and outbound events to synchronize data from the Aptean Routing and Scheduling extension to external systems via the [Aptean Integration Platform](#) connector. For more information, see [Process AIP events](#).

When the customer, vendor, location, customer ship-to, or vendor order address records are created, modified, or deleted, the system automatically creates a corresponding event on the **AIP Events** page. You can then choose to process the event as required. Additionally, you can set up a batch to automatically process AIP events via job queue entries from the **AIP Connection Setup** page. For more information, see [Manage AIP events](#).

You can execute the **Configure AIP** action on the **Routing And Scheduling Setup** page to connect with the [Aptean Integration Platform](#). When the Aptean [POD Integration Connector](#) is installed, the system sends a request to AIP to subscribe to events for the Proof of Delivery (POD) and Routing and Scheduling (RAS) products for the current tenant, and maps the products, definition types, and event subscriptions in a single step.



Aptean POD Integration Connector

Article • 7/2/2025 • 1 min read

When the Aptean Routing and Scheduling (RAS) extension is used in conjunction with the Aptean [POD Integration Connector](#), you can track and validate deliveries against predefined routes and schedules. This ensures that deliveries follow the planned routes, and any delays or deviations can be identified and addressed efficiently within Business Central.

