

# User Manual

# Aptean Food and Beverage ERP

**Aptean TMS**

Product Documentation



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# Release notes

Article • 3/26/2025 • 1 min read

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

 Important

The Aptean TMS extension has been replaced by Aptean Routing and Scheduling, which offers improved features, expanded capabilities, and an enhanced user experience. For more information, see Aptean [Routing and Scheduling](#).

Date	Release version	Description
August 2024	<a href="#">1.2.176572.0</a>	Stability release
December 2022	<a href="#">1.1.72501.0</a>	Stability release
March 2022	<a href="#">1.0.44777.0</a>	Initial release



# 1.2.176572.0

Release Note • 8/12/2024 • 1 min read

## Enhancements/Modifications

With this release of the Aptean TMS extension, the process has been enhanced to manage the *User Group* and *User Group Permission Set* tables. This ensures compatibility with both current and future versions of Business Central, even when these tables are deprecated.

### Note

The *User Group* and *User Group Permission Set* tables are removed in Business Central, version 25.



# 1.1.72501.0

Release Note • 4/3/2023 • 1 min read

## Enhancements/Modifications

Modifications were made for the Aptean TMS to work seamlessly with the Aptean POD extension. The Aptean POD extension enables you to optimize the proof of delivery process within your Microsoft Dynamics 365 Business Central solution. It supports streamlining real-time delivery processes and enhances customer service.



# 1.0.44777.0

Article • 4/3/2023 • 1 min read

## Features

This Business Central extension helps you to manage your TMS activities online through Aptean TMS Connector.

The Aptean TMS Connector for Aptean Food and Beverage ERP, originally created for BC 18, is now made compatible with both BC 19 and BC 20 versions too. This includes the following features:

- Send Ship-to Address (Cust) and Sales Order (Call) Data from Business Central to Aptean Routing and Scheduling
- Load Sales Orders Routing details from Aptean Routing and Scheduling to Business Central



# Aptean TMS

Article • 3/26/2025 • 2 min read

Aptean TMS is created to optimize the routing and scheduling process within your Microsoft Dynamics 365 Business Central solution. It supports you in creating a schedule and routing your orders by sharing the sales orders and customer related information. You can maximize the utilization of your vehicles, increase the number of jobs per vehicle, decrease miles per drop, and utilize back haul capability to reduce route planning costs by up to 30%. Regardless of whether you have a single or multiple depots, and same day or multi-day routes, our software can help you reduce transportation costs.

After Aptean TMS is set up, you can send the sales order along with the shipment and customer details to Aptean [Routing and Scheduling](#). From there you can route, sequence and schedule your deliveries. Once complete, this information is reflected back in the Sales Orders. Alternatively, you can use the Aptean [Proof of Delivery](#) extension to analyze the real-time planned versus the actual journey. This enables you to analyze discrepancies and continuously improve route plans. You can also model different what-if scenarios and identify strategic improvements to operations, territory coverage, or transportation infrastructure.

## Important

The Aptean TMS extension has been replaced by Aptean Routing and Scheduling, which offers improved features, expanded capabilities, and an enhanced user experience. For more information, see Aptean [Routing and Scheduling](#).



# Setup

Article • 4/29/2023 • 1 min read

To process the Aptean TMS routing and scheduling, an Aptean employee must provide you with the following information:

- Aptean TMS URL
- Aptean TMS Tenant ID
- Project ID
- APIM Key

After you receive the above information, you must perform the setups and configuration tasks.





# Install the Aptean TMS Extension

Article • 4/3/2023 • 3 min read

To use the Aptean TMS functionality, you must install the Aptean TMS extension.

To install the Aptean TMS extension:

1. Select the Search icon , enter *extension management*, and then choose the related link.  
The **Extension Management** page opens.

2. On the **Aptean TMS** extension, choose the context menu , and then choose **Install**.  
The **Extension Installation** page opens.

3. Choose **Next**.  
The **Review Extension Information Before Installation** details are displayed.

4. Turn on **I accept the terms and conditions**.

5. Choose **Install**.  
A dialog box confirms "*The Aptean TMS extension was successfully installed. All active users must log out and log in again to see the navigational changes*".

6. Click **OK** to close the dialog box.




# Assign an Aptean TMS Permission Set to a User

Article • 4/29/2023 • 2 min read

The permission sets, *APTEANTMSADMIN*, *APTEANTMSPROCESSOR*, and *APTEANTMSBASIC* are intended for users responsible for Aptean TMS administration, and Aptean TMS routing and scheduling. The tasks that can be performed with these permission sets are specified in the following table:

Page & Functionality	>	>	Permission Set
	<i>APTEANTMSADMIN</i>	<i>APTEANTMSPROCESSOR</i>	<i>APTEANTMSBASIC</i>
<b>Aptean TMS Setup page:</b> <ul style="list-style-type: none"> <li>Define</li> <li>Edit</li> <li>Delete</li> </ul>	Yes	No	No
<b>Sales Order page:</b> <ul style="list-style-type: none"> <li>Create Sales Order</li> <li>Send Sales Order</li> <li>Update Sales Order</li> <li>Delete Sales Order</li> <li>Load routed Sales Order</li> </ul>	Yes	Yes	Yes

## To assign an Aptean TMS Permission set to a user

1. Select the Search icon , enter *Users*, and then choose the related link.  
The **Users** page opens.
2. Select the user that you want to assign an Aptean TMS permission set.
3. On the action bar, choose **Edit**.  
The **User Card** page opens.
4. In the **Permission Set** field, specify the permission set that you want to assign to the user.




# Import Configuration Package

Article • 4/29/2023 • 2 min read

To facilitate the import of set up data, such as tables and records, you can use configuration packages. The configuration package lets you apply and set up new areas as you need them.

## To import the configuration package:


1. Select the Search icon , enter *Configuration Packages*, and then choose the related link.  
The **Configuration Package** page opens.
2. Under the **Process** tab, select **Import Package** > **Choose**.
3. Choose the RapidStart file and choose **Open**.  
You can see the new package on the screen now.
4. Choose the **Aptean\_TMS** link.  
A new page opens.
5. Under the **Process** tab, choose **Apply Package**.  
A dialogbox displays the following prompt:  
*Apply data from package Aptean\_TMS?*
6. Choose **Yes**.  
A dialog box confirms that the number of tables are processed, errors found, records inserted and modified.
7. Click **OK** to close the dialog box.



# Configure Role Center

Article • 4/29/2023 • 2 min read

To integrate your Business Central solution with the Aptean TMS API:

1. Select the Settings icon  , and choose **My Settings**.  
The **Edit - My Settings** page opens.
2. In the **Role** field, choose the AssistEdit button.  
The **Available Roles** page opens.
3. Choose **Aptean TMS**.
4. Select **OK**.




# Configure Aptean TMS

Article • 4/29/2023 • 3 min read

To integrate your Business Central solution with the Aptean TMS:

1. On the Role center, Choose **Setup**.
2. Choose **Aptean TMS Setup**.

Alternatively,


3. Select the Search icon , enter *Aptean TMS Setup* and choose the related link.  
The **Aptean TMS Setup** page opens.
4. On the **Aptean Routing and Scheduling** FastTab, enable **Use Aptean Routing and Scheduling**.
5. Enter the URL, Tenant ID, Project ID, APIM Key and Admin Email in the respective fields.

## Note

Make sure you provide an admin email address to send the notifications in case an error occurs during the routing and scheduling.

6. In the **Sales Order Inclusion** field, enter the number of days that you want to send the sales orders from the present day.
7. Under the **Measure Setup** group, configure Weight, Volume and Quantity in the **Measure 1**, **Measure 2** and **Measure 3** fields.

## Note

You can edit these fields by selecting the  icon on the top of the page.

8. On the action bar, go to **Actions > Aptean Routing and Scheduling > Test API Connection**.

The test result is displayed in a dialog box.



# Enable Shipment Method

Article • 4/3/2023 • 2 min read

Shipment methods are used to integrate the routing process with Aptean TMS. To assign the shipment method in the sales order, you must enable it on the **Shipment Methods** page.

To enable the Shipment Method:

1. On the Role center, choose **Aptean TMS**.
2. Choose **Shipment Methods**.  
The **Shipment Methods** page opens.
3. In the **Enable Aptean Routing and Scheduling Integration** field, enable the shipment method that you want to assign.



# Customer Setup for Aptean TMS


Article • 7/4/2023 • 3 min read

You can set up the alternate shipping address on the **Customer Card** page so that it appears on sales orders created for that customer.

## Note

To populate the alternate shipping address on the **Sales Order** page, the *Alternate Shipping Address* option should be selected in the **Ship-to** field.

To setup the customer details:

1. On the Role center, choose **Aptean TMS**.
2. Choose **Customers**.  
Alternatively,  
Select the Search icon  , enter *customers*, and choose the related link.  
The **Customers** page opens.
3. Open the appropriate customer card.  
Alternatively,  
On the action bar, select **New** to create a new customer card.  
The **Customer Card** page opens.
4. Fill all the necessary fields.
5. On the **Shipping** FastTab, in the **Ship-to Code** field, select the alternate shipping address code.

## Note

The alternate shipping address can also be changed on the **Sales Order** page.




# Set up Job Queue Entry for Sales Orders

Article • 7/4/2023 • 3 min read

You can use Job Queues to automate the process of sending sales orders to Aptean Routing and Scheduling and loading it once it is routed by Aptean Routing and Scheduling. However, it's an optional setup.

To set up job queue entry for sales orders:

1. Select the Search icon , enter *job queue entries*, and then choose the related link.

The **Job Queue Entries** page opens.

2. On the action bar, choose **New**.

The **Job Queue Entry Card** page opens.

3. On the **General** FastTab, perform the following steps:

- a. In the **Object Type to Run** field, specify *Codeunit\_*.

- b. In the **Description** field, specify a description for the job.

- c. In the **Object ID to Run** field,

- If you want to send the sales order, specify the ID of the **ApteanTMSSendingSchedulerFDW** codeunit and enter *Sales Orders* in the **Parameter String** field.
- If you want to load the sales order, specify the ID of the **ApteanTMSLoadingSchedulerFDW** codeunit.

- d. In the **Earliest Start Date/Time** field, specify the earliest date and time that the job can run.

4. On the **Recurrence** FastTab, perform the following steps:

- a. To specify the frequency for the job, perform one of the following steps:

- Turn on the days on which the job is to run.
- In the **Next Run Date Formula** field, specify the date formula to calculate the next time the recurring job is to run.

For example, to have the job run once a day, specify *1D*.

- b. In the **Starting Time** field, specify the earliest time of the day that the recurring job is to run.

- c. In the **Ending Time** field, specify the latest time of the day that the recurring job is to run.

- d. In the **No. of Minutes between Runs** field, specify the minimum number of minutes that are to elapse between runs of the job.

## Note

This field is only applicable when the job is set to be a recurring job.



e. In the **Inactivity Timeout Period** field, specify how many minutes can pass before a recurring job that has the status of *On Hold* is automatically restarted.

5. On the action bar, choose **Process > Set Status to Ready**.



# Routing and Scheduling

Article • 4/3/2023 • 1 min read

After Aptean TMS is set up, you can send, update, and delete sales orders as well as process in, to receive the routed information. To learn more, visit the respective links.

## Related Topics

[Create and Send Sales Order](#)

[Update Sales Order](#)

[Delete Sales Order](#)

[Load Routed Sales Order](#)

[View the Aptean TMS Log](#)



# Create and Send Sales Order

Article • 4/29/2023 • 10 min read


You can create and send the sales order to Aptean Routing and Scheduling once you perform the necessary setups.

To send the sales order to Aptean Routing and Scheduling, the alternate shipping address should be configured. Based on the alternate shipping address, a unique id is generated that is used to assign the route.

## Prerequisites

- Aptean TMS setup should be completed. For more information, see [Configure Aptean TMS](#).
- Ensure the Shipment Method is enabled. For more information, see [Enable the Shipment Method](#).
- Customer setup for Aptean TMS should be completed. For more information, see [Customer Setup for Aptean TMS](#).

## To create the Sales Order

1. On the Role center, choose **Aptean TMS**.
2. Choose **Sales Order**.  
Alternatively,  
Select the Search icon , enter *sales orders* and choose the related link.  
The **Sales Orders** page opens.
3. On the action menu, select **New**.  
The new **Sales Order** page opens.
4. In the **Customer Name** field, select the customer card.
5. On the **Shipping and Billing** FastTab,
  - a. In the **Ship-to** field, select the **Alternate Shipping Address** option. The address on the Ship-to Address card is used which is linked with the customer you choose.

### Note

You can also change the alternate shipping address code in the **Code** field.

- b. In the **Shipment Date** field, enter the date that you want the order to be delivered.
6. Under the **Shipment Method** group, select the shipment method code in the **Code** field.
  7. Fill all the necessary fields.



**Note**

It is mandatory to provide the values of weight and volume before sending the sales order. You must also ensure the value of volume restriction setup in Aptean Routing and Scheduling is always higher than the value of volume that you provide in Business Central.

To provide the value of weight:

- a. Go to the **Items** page and select the appropriate item.  
The **Item Card** page opens.
- b. On the **Inventory** FastTab, enter the weight value in the **Net Weight** field.

To provide the value of volume:

1. Go to the appropriate **Sales Order** page.
2. Under the **Lines** FastTab, select the dropdown in the **Unit of Measure Code** field.
3. Choose **Select from full list**.  
The **Item Units of Measure** page opens.
4. On the action bar, select **Edit List**.
5. In the **Cubage** field, enter the volume value and select **OK**.

8. On the **Sales Order** page, select **Release** > **Release** on the action menu.  
Now the sales order is released. You can check the status in the **Status** field.

## To send the Sales Order

You can send the sales order either manually or automatically.

To send the sales order automatically, see [Set up Job Queue Entry for Sales Order](#).

To send the sales order manually:

1. In the **Status** field, make sure the status of the sales order is **Released**.
2. On the action bar, go to **Actions** > **Aptean TMS** > **Aptean Routing and Scheduling** > **Send Sales Order**.

A dialog box confirms "*Sales Order has been sent to Aptean Routing and Scheduling*".

3. Click **OK**.



 Note

You can find the status of the sales order, Master and Run Key, and also the date and time that it was sent and last modified under the **Aptean TMS** FastTab.

To send multiple sales orders manually:

4. On the Role center, choose **Setup**.

5. Choose **Aptean TMS Setup**.

Alternatively,

Select the Search icon , enter *Aptean TMS Setup* and choose the related link.

The **Aptean TMS Setup** page opens.

6. On the Action bar, go to **Actions > Aptean Routing and Scheduling > Send Sales Orders**.

You can also send multiple sales orders from the **Sales Orders** page.



# Update Sales Order


Article • 7/4/2023 • 2 min read

You can update or change the details on the sales order.

## Note

The sales order can be updated only before it is routed by Aptean Routing and Scheduling.

To update the sales order:

1. Select the Search icon , enter *sales orders* and then choose the related link.  
The **Sales Orders** page opens.
2. Open the appropriate sales order that you want to update.
3. On the action menu, select **Release > Reopen**.  
Now the status of the sales order is changed to **Open**.
4. Update the details in the respective fields.
5. On the action menu, select **Release > Release**.  
Now the status is changed to **Released**.
6. Send the sales order to Aptean Routing and Scheduling.  
To send the updated sales order details, see [To send the Sales Order](#).



# Delete Sales Order

Article • 4/3/2023 • 3 min read

You can delete the sales order either only in Business Central or in both Aptean Routing and Scheduling and Business Central.

## Note


The sales order can be deleted only before it is routed by Aptean Routing and Scheduling.

To delete the sales order:

1. Choose the  icon, enter *sales orders* and choose the related link.

The **Sales Orders** page opens.

2. Open the appropriate sales order that you want to update.

3. On the top of the page, choose the  icon.

A dialog box appears.

4. Click **Yes**.

A dialog box displays the following prompt:

*This sales order is synced with Routing and Scheduling. Do you want to delete this sales order at Routing and Scheduling too?*

- a. Click **Yes**, if you want to delete it in both Business Central and Aptean Routing and Scheduling.
- b. Click **No**, if you want to delete it only in Business Central.




# Load Routed Sales Order

Article • 7/4/2023 • 3 min read

You can view the routing details by loading the sales order once it is routed by Aptean Routing and Scheduling. It can be loaded either manually or automatically.

To load the sales order automatically, see [Set up Job Queue Entry for Sales Order](#).

To load the sales order manually:

1. Select the Search icon , enter *Aptean TMS Setup* and then choose the related link.  
The **Aptean TMS Setup** page opens.
2. On the action bar, go to **Actions > Aptean Routing and Scheduling > Load Sales Orders**.

A dialog box confirms "*Routing details for \_\_ Sales Order(s) loaded from Aptean Routing and Scheduling*".

3. Click **OK**.
4. Go to the **Sales Orders** page and open the appropriate sales order.

## Note

You can view the routing details under the **Aptean TMS FastTab**. It includes the route number, stop sequence number, trip number and also the date and time when the sales order was recently loaded.



# View the Aptean TMS Log

Article • 4/29/2023 • 2 min read

You can view the log information of sales order records on the **Aptean TMS Log** page. The log information includes the Source Table IDs and Document numbers, Status of the logs, API Responses and Request Types, and the date and time when the last record was sent.

## Note


The log records are created when you send or update, and delete the sales orders.

To view the Aptean TMS Log:

1. On the Role center, choose **Aptean TMS**.

2. Choose **Aptean TMS Log**.

Alternatively,

Choose the Search icon  and enter *Aptean TMS Log* and choose the related link.

The **Aptean TMS Log** page opens.

