

User Manual

Aptean Food and Beverage ERP

Transport

Product Documentation



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Transport

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Release notes

Article • 7/22/2026 • 3 min read

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

Date	Release version	Description
July 2026	2603.0.0.0	Major release
June 2026	2602.2.328163.0	Hotfix release
June 2026	2602.2.0.0	Minor release
May 2026	2602.1.0.0	Minor release
April 2026	2602.0.0.0	Major release
March 2026	2601.3.0.0	Stability release
February 2026	2601.2.0.0	Stability release
January 2026	2601.1.0.0	Stability release
January 2026	2601.0.0.0	Feature release
November 2025	2514.1.0.0	Stability release
October 2025	2514.0.0.0	Feature release
September 2025	2513.2.0.0	Stability release
August 2025	2513.1.0.0	Stability release
August 2025	2513.0.0.0	Feature release
July 2025	2512.0.0.0	Feature release
July 2025	2511.1.0.0	Stability release
July 2025	2511.0.0.0	Feature release
July 2025	2510.0.0.0	Feature release
July 2025	2509.0.0.0	Feature release
June 2025	2508.1.0.0	Stability release
May 2025	2508.0.0.0	Feature release

May 2025	2507.3.0.0	Stability release
April 2025	2507.2.0.0	Platform release
April 2025	2507.1.0.0	Stability release
April 2025	2507.0.0.0	Feature release
April 2025	2506.0.0.0	Feature release
March 2025	2505.2.0.0	Stability release
March 2025	2505.1.0.0	Stability release
March 2025	2505.0.0.0	Feature release
March 2025	2504.1.0.0	Stability release
March 2025	2504.0.0.0	Feature release
March 2025	2503.1.0.0	Stability release
February 2025	2503.0.0.0	Feature release
February 2025	2502.0.0.0	Feature release
February 2025	2501.2.0.0	Platform release
January 2025	2501.1.0.0	Platform release
January 2025	2501.0.0.0	Feature release
December 2024	2406.4.0.0	Stability release
December 2024	2406.3.0.0	Stability release
December 2024	2406.2.0.0	Stability release
October 2024	2406.1.0.0	Stability release
October 2024	2406.0.0.0	Feature release
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2603.0.0.0

Release Note • 7/22/2026 • 2 min read

Enhancements/Modifications

With this release of the Aptean Transport Management extension, the system

- Ensures that the **Shipment Method** and **Shipping Agent** fields are updated correctly on warehouse documents created via the **Transport Management** page for **Purchase Return Orders** and **Sales Return Orders**.
- Allows you to manually update the **Transport Route Code** and **Shipment Date** on the **Sales Orders** page. When the **Allow Manual Transport Route Assignment** toggle is turned on in the **Sales Orders** page, the system retains the manually entered **Transport Route Code** and **Shipment Date** instead of automatically recalculating them based on transport planning. When the toggle is turned off, the existing behavior is maintained, and the system continues to automatically determine the **Transport Route Code** and **Shipment Date**.

UI/UX changes

The following UI/UX change has been made in this release.

- The **Allow Manual Transport Route Assignment** toggle has been added to the Sales Order page.

Resolved issues

The following issues have been resolved in this release.

ID	Description
380083	The system fails to retain the route-calculated Shipment Date field value on the Sales Line when the Requested Delivery Date field value is populated on the Sales Order , causing the Shipment Date field value to be overwritten with the Requested Delivery Date field value instead.
379951	The system fails to refresh the Transport Cost Calculation and Cost Amount Internal (LCY) fields on the Transport Order header when a Purchase Order is assigned to a Transport Order that already has existing transport cost lines, resulting in inconsistent cost values between the Transport Order card, the Transport Management page, and the posted Purchase Order.
382978	The system displays an incomplete confirmation message when you change the Requested Delivery Date , Shipment Date , Promised Delivery Date , or Shipping Time fields on the Sales Orders page.



2602.2.328163.0

Release Note • 6/29/2026 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
380629	An error occurs when multiple users release sales orders at the same time, because of a deadlock on the transport request table.



2602.2.0.0

Release Note • 6/24/2026 • 2 min read

Resolved issues

The following issues have been resolved in this release.

ID	Description
372336	The system fails to populate the Location Code field on all Transport Orders created from the Transport Planning page when multiple lines with the same Shipping Agent and different Transport Route Codes are processed simultaneously.
375180	The system previously inherited the decimal precision in the Quantity per Transport Floor Space Type field on the Item-Transport Floor Space Type page from another setup. This issue arises when the inherited precision does not provide sufficient accuracy for quantity conversions.
378643	The system fails to retain the special characters entered in the Comments field on the Transport Order page. Additionally, the system replaces them with question marks (?) after the order is saved and reopened, without displaying an error message, resulting in corrupted text.
377430	The system fails to select the Changed checkbox on the related Transport Planning Lines page when the Promised Delivery Date field value is updated on a sales order.
376739	The system fails to return data from the Source Document Info action on the Transport Order subform for inbound requests.
376751	The system fails to correctly allocate the transport rate when multiple purchase orders are included in the same Transport Order. When the rate is configured as <i>Lump Sum</i> , the total amount is divided equally between orders without considering relevant criteria such as the number of pallets.
377947	The system fails to recalculate the Calculated Volume field value when executing the Update Weights action on a transport order, resulting in incorrect weight and volume values being displayed on the transport order.



2602.1.0.0

Release Note • 5/27/2026 • 3 min read

Enhancements/Modifications

With this release of the Aptean Transport extension, the system:

- Allows you to publish reports directly from the **Transport Order** and **Posted Transport Order** pages using the **Publish** and **Publish Directly** actions. This enables transport planners to quickly email or print transport order documents to shipping agents without manually downloading reports. For more information, see [Publish reports from transport orders](#).
- Uses custom category codes to link transport order documents to the document publication report selection setup. You must configure the **Transport Order Custom Category Code** and **Posted Transport Order Custom Category Code** field values on the **Transport Setup** page. For more information, see [Configure the Transport Setup](#).
- Supports all email origin options for transport/posted transport order reports, including *Fixed*, *Document*, *Contact*, and *Organizational Level*.

Integrations

The Aptean Transport extension has been integrated with the Aptean [Document Publication](#) extension. For more information, see [Integrations](#).

UI/UX changes

The following UI/UX changes have been made in this release.

- The **Publish** and **Publish Directly** actions have been added to the **Transport Order** list and card pages.
- The **Publish** and **Publish Directly** actions have been added to the **Posted Transport Order** list and card pages.
- The **Transport Order Custom Category Code** field has been added to the **Transport Setup** page.
- The **Posted Transport Order Custom Category Code** field has been added to the **Transport Setup** page.

! Note

These fields and actions are only visible when the Aptean Document Publication extension is installed.



Resolved issues

The following issues have been resolved in this release.

ID	Description
361072	When the language is set to Dutch, the system incorrectly translates the caption Transport to Vervoer .
367642	The system fails to create a transport order and warehouse shipment when executing the Create Transport Order action on the Transport Planning page for multiple transfer orders sharing the same transport route code. This issue occurs because the transport route code from the transfer header is not propagated to the warehouse request when the transfer order is released.
368966	The system fails to update the weight values on the Transport Order page when items are posted as part of the warehouse shipment process, resulting in inaccurate weight information displayed on the transport order.
373384	The system fails to restrict negative values in the Floor Space Calculation Rounding Precision field on the Transport Setup page, resulting in runtime errors or incorrect floor-space calculations during transport floor space calculation.
366281	The system fails to transfer freight cost lines from transport orders to related orders when executing the Post Transport Order action on the Transport Management page. This issue occurs when a transport order includes freight cost with the Aptean Trade Management extension installed, resulting in missing freight costs.



2602.0.0.0

Release Note • 4/22/2026 • 1 min read

Enhancements/Modifications

With this release of the Aptean Transport extension, the system prints reports from the **Transport Order** and **Posted Transport Order** pages based on the language code defined on the **Vendor Card** page linked to the shipping agent.

The system supports the following language codes:

- Danish
- Dutch
- English
- French
- German
- Spanish

This enhancement addresses the issue reported in bug ID #340582.

Resolved issues

The following issue has been resolved in this release.

ID	Description
340582	The system fails to consider the language code defined on the Vendor card page linked to the shipping agent when printing reports from the Transport order and Posted Transport order pages.
363571	The system fails to populate the Shipping Agent and Shipment Method field values on the Warehouse Receipt page linked to the Purchase Order page when creating a warehouse receipt via the Transport Management page.
363227,361470	The system fails to update the Planned Receipt Date field value in the filter with the Planned Receipt Date field value from the related Purchase Order page when the Source Document Info action is executed on the Transport Request page.



2601.3.0.0

Release Note • 3/25/2026 • 2 min read

Enhancements/Modifications

With this release of the Aptean Transport extension,

- You can define how long to retain skipped transport requests using the **Skipped Requests Deletion DF** field on the **Transport Setup** page. This field specifies the age (for example, 1 week or 1 month) after which the system deletes skipped requests automatically. To know more, see Set up transport.
- The system automatically deletes skipped transport requests based on the retention period defined in the **Skipped Requests Deletion** field on the **Transport Setup** page. It removes requests with a *Skipped* status, no transport order assignment, and a fully posted and deleted source document using the **Delete Skipped Transport Requests** report, which can be scheduled through a **Job Queue** entry.

UI/UX changes

The **Skipped Requests Deletion** field has been added to the **Transport Setup** page.

Resolved issues

The following issues have been resolved in this release.

ID	Description
361197	The system incorrectly assigns the route code on the Sales Order page when a customer is assigned to multiple transport routes for different days of the week. This issue occurs when the Auto-calculate Shipment Date toggle on the Transport Setup page is turned on, the system evaluates only the first matching route assignment and does not consider other routes that may be valid for the shipment day.
357941	The system does not validate the relationship between the Shipment Date and Delivery Date in the Sales Order page. It currently allows the Shipment Date to be set to a value later than the Delivery Date , resulting in inconsistent date data within the order.
356693	The system fails to delete transport planning lines with status <i>Skipped</i> from the Transport Planning page where the source document is fully posted and removed.



2601.2.0.0

Release Note • 2/25/2026 • 1 min read

Resolved issues

The following issues have been resolved in this release.

ID	Description
354488	• The system fails to create the warehouse receipt in transport management, when the language is set to German. • The system fails to post the transport order in transport management when the Create and Post Purchase Order toggle on the Transport Setup page is turned off.
351112	An error occurs on the Sales Order page when running the Combine Shipments By report after updating the Shipment Date field value on the Sales Order page based on the transport route assignment.
353376	The system incorrectly creates a new transport request line instead of updating the existing line when a sales order is reopened, the Shipment Date field value is updated, and the order is re-released.
354999	The system fails to update the Transport Route Code field value on the Sales Order page when the Shipment Date field value is changed to a date that does not fall within any defined transport route version range.

See also

[Known issues](#) - Lists current issues and their status.



2601.1.0.0

Release Note • 1/28/2026 • 1 min read

Resolved issues

The following issues have been resolved in this release.

ID	Description
342401	When the language is set to Dutch, • The system incorrectly translates the Pick-Up caption on the Transport Order and Posted Transport Order reports. • The system incorrectly translates the caption of the Print action on the Transport Order and Posted Transport Order pages.
343485	The system fails to display the consolidated floor spaces for each line in the Total Floor Spaces field on both the Transport Order and Posted Transport Order reports.



2601.0.0.0

Release Note • 1/28/2026 • 1 min read

Features

With this release of the Aptean Transport extension, the system validates the transport status of the relevant sales order lines the system validates the transport status of sales order lines before allowing backorder actions. If a sales order line is linked to a transport order, backorder management is blocked and quantity movements are not allowed, otherwise, backorder management remains available. For more information, see [What's new in Backorder Management, version 2601.0.0.0](#).

Integrations

The Aptean Transport extension has been integrated with the Aptean [Backorder Management](#) extension. To know more, see [Integrations](#).



2514.1.0.0

Release Note • 11/26/2025 • 2 min read

Enhancements/Modifications

With this release of the Aptean Transport extension,

- You can view the floor space caption in the **Floorspaces** field on the **Transport Order** report. This caption is inherited from the **Code Caption** field value assigned to the corresponding code on the **Transport Floor Space Types** page. After you post the transport order, the same caption appears in the posted transport order report.
- When you print the **Transport Order** report, the lines appear in the sequence defined by the **Stop Sequence No.** field value on the **Transport Order** page. This enhancement addresses the issue reported in bug ID #336499.
- When you execute the **Print** action on the **Posted Transport Order** page, the system includes the instructions if the **Instruction available** checkbox is selected. The instructions added on the **Transport Request Instructions** page are printed with the transport order.

 **Note**

Instructions are retained when the source document is updated.

- The translation file for the Swedish (sv-SE) language has been updated with standard texts for better readability.

Resolved issues

The following issues have been resolved in this release.

ID	Description
336499	The system incorrectly prints the Transport Order report by arranging the lines based on the Source Document No. field value on the Transport Order page.
312275	An error occurs on the Sales Order page when releasing the sales order or creating a shipment request. This issue arises immediately after entering the quantity on the first sales line and moving to the next line.



2514.0.0.0

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

Features

With the feature added in this release of the Aptean Transport extension, you can print or reprint the posted transport order report. For more information, see [Set up transport](#).

UI/UX changes

- The **Posted Transport Order Report ID** field has been added to the **Transport Setup** page.

Resolved issues

The following issue has been resolved in this release.

ID	Description
326062	The system incorrectly updates the Pick-up Date/Time field value on the Posted Transport Order page.



2513.2.0.0

Release Note • 9/24/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
309061	When the language is set to Dutch, the system incorrectly translates the caption for the Posting action on the Transport Order page.



2513.1.0.0

Release Note • 8/27/2025 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean E-Commerce extension. For more information, see [What's new in E-Commerce, version 2502.1.0.0](#).



2513.0.0.0

Release Note • 8/27/2025 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Apteian POD Integration Connector. For more information, see [What's new in POD Integration Connector, version 2503.0.0.0](#).

UI/UX changes

The following UI/UX changes have been made in this release.

- The **Mark as Fully Loaded** action has been added to the **Transport Management** page.
- The **Pickup Time** field has been added to the **Transport Request**, **Transport Order**, **Transport Planning**, and **Transport Management** pages.



2512.0.0.0

Release Note • 7/30/2025 • 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 [What's new in POD Integration Connector, version 2502.0.0.0](#).



2511.1.0.0

Release Note • 7/30/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
309186	When the language is set to Dutch, the system incorrectly translates the caption of the License Plate field on the Vehicles list and Vehicle Card pages.



2511.0.0.0

Release Note • 7/30/2025 • 1 min read

Features

With the feature added in this release of the Aptean Transport extension, you can view the floor space area calculated based on the item quantity and the defined floor space dimensions (length and width) in the **Calculated Floor Space Surface** field value on the **Trade Cost Assignment** and **Item Charge Assignment** pages. For more information, see [Manage trade cost orders](#).

 Note

This feature is available only when the Aptean [Trade Management](#) extension is installed. For more information, see [What's new in Trade Management, version 2506.0.0.0](#).

Resolved issues

The following issue has been resolved in this release.

ID	Description
270112	The system fails to allocate costs by floor space, net weight, and unit of measure on the Trade Cost Assignment and Item Charge Assignment pages. This issue occurs only when the Aptean Trade Management extension is installed.



2510.0.0.0

Release Note • 7/2/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Transport extension, you can define transport route assignments for customers to control the delivery dates available on the e-commerce platform. To know more, see [Highlights of E-Commerce, version 2501.0.0.0](#).

Integrations

The Aptean Transport extension has been integrated with the Aptean [E-Commerce](#) extension. For more information, see [Integrations](#).



2509.0.0.0

Release Note • 7/2/2025 • 3 min read

Features

With the features added in this release of the Aptean Transport extension,

- You can view the **Location Code** field on the **Transport Order** and **Transport Management** pages.
- The system updates the **Location Code** field value automatically when creating a transport order after executing the **Create Transport Order** action on the **Transport Planning** page if all associated stops have the same location code. If the stops have different values, the field remains blank.
- You can view and define pickup, delivery date, and time information on the **Transport Planning**, **Sales Order**, **Sales Return Order**, **Purchase Order**, **Purchase Return Order**, and **Transfer Order** pages. The system displays the fields based on the document type:
 - Outbound documents (sales order and purchase return order): Displays delivery date and time.
 - Inbound documents (purchase order and sales return order): Displays pickup date and time.
 - Transfer orders: Displays both pickup and delivery date and time fields.

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

UI/UX changes

The following UI/UX changes have been made in this release.

- The **Location Code** field has been added to the **Transport Order** and **Transport Management** pages.
- The following fields have been added to the **Transport Planning** and **Transport Request** pages linked to the **Transport Order** page.
 - Pickup Date



Transport

- Pickup Starting Time
- Pickup Ending Time
- Delivery Date
- Delivery Starting Time
- Delivery Ending Time
- The **Planned Start Date Time**, **Planned End Time**, **Planned Departure Date Time**, and **Planned Return Date Time** fields have been added to the **General** FastTab of the **Transport Order** page.
- The **Delivery Starting Time** and **Delivery Ending Time** fields have been added to the **Sales Order**, **Purchase Return Order** and **Transfer Order** pages.
- The **Pickup Date**, **Pickup Starting Time**, and **Pickup Ending Time** fields have been added to the **Purchase Order**, **Sales Return Order** and **Transfer Order** pages.
- The **Pickup Starting Time** and **Pickup Ending Time** fields have been added to the **Vendor Card** page.
- The **Delivery Starting Time** and **Delivery Ending Time** fields have been added to the **Customer Card** page.
- The following fields have been added to the **Location Card** page:
 - Shipping Starting Time
 - Shipping Ending Time
 - Receiving Starting Time
 - Receiving Ending Time



2508.1.0.0

Release Note • 6/4/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
296701	When the language is set to Dutch, the system incorrectly translates the field names on the Docking FastTab of the Transport Order page and the General FastTab of the Dock Status Card page.



2508.0.0.0

Release Note • 5/21/2025 • 1 min read

Features

With the feature added in this release of Aptean Transport extension, you can configure whether the automatically updated shipment date is set earlier or later than the current shipment date by defining in the **Update Shipment To** field on the **Transport Setup** page. For more information, see [Set up transport](#).

Note

This functionality is available only when the Aptean [Shop Floor Logistics](#) extension is installed.

UI/UX changes

The **Update Shipment To** field has been added to the **Transport Setup** page.



2507.3.0.0

Release Note • 5/7/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
286307	The system displays incorrect translations for some fields on the Transport Order and Transport Route Assignment pages when the Region and Language field values are set to <i>German (Germany)</i> on the My Settings page. This issue occurs when the Aptean Expiration Management extension is installed.



2507.2.0.0

Release Note • 4/30/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Transport extension, common warnings in various objects have been removed or marked as obsolete, as part of a code cleanup activity.



2507.1.0.0

Release Note • 4/23/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
285943	An error occurs upon executing the Transport Route Assignments action on the Transport Route page when the Transport Route Assignments page contains lines with different Source Type field values but the same Source No. , Location Code , Route Code , and Version field values.



2507.0.0.0

Release Note • 4/14/2025 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean Trade Management extension. For more information, see [What's new in Trade Management, version 2505.0.0.0](#).

Resolved issues

The following issue has been resolved in this release.

ID	Description
252512	The system fails to update the following field values on the Trade Plan Card page. • When the Type Code field value is copied to a new line, the Description field value is not updated. • When the Calculation Type field value is changed from <i>Floor Space</i> to any other value, the Calculation Rate Type No. field value is not updated to blank. This issue occurs when the Trade Plan Type field value is set to <i>Freight</i> and the Aptean Trade Management extension is installed.



2506.0.0.0

Release Note • 4/9/2025 • 2 min read

Features

With the features added in this release of the Aptean Transport extension,

- The **Net Weight** field value is derived from the net weight value on the source document. You can access this field from the following pages:
 - Transport Management
 - Transport Planning
 - Split Transport Request
- The **Tare Weight** field value is calculated as the difference between the **Calculated Gross Weight** and the **Net Weight** fields value. You can access this field from the following pages:
 - Transport Management
 - Transport Planning
 - Split Transport Request
 - You can view the unit of measure code in the **Total Weight** and **Weight** field captions on the transport order report.

Enhancements/Modifications

With this release of the Aptean Transport extension, the **Floorspaces** field alignment has been enhanced on the transport order report for better readability.

UI/UX changes

The following UI/UX changes have been made in this release.

- The **Net Weight** and **Tare Weight** fields have been added to the **Transport Requests** FastTab of the **Transport Management**, **Transport Planning** and **Split Transport Request** pages.
- The unit of measure code has been added to the **Total Weight** and **Weight** field captions on the transfer order report.
- The **Weight** field has been renamed to **Gross Weight** on the **Transport Planning**, **Split Transport Request** and **Transport Order** pages.



Transport

- The **Calculated Weight** field has been renamed to **Calculated Gross Weight** on the **Transport Requests** FastTab of the **Transport Management**, **Transport Planning**, **Split Transport Request**, and **Transport Order** pages.
- The *Print Transport Order* option in the **Report Name** field has been renamed to *Transport Order report* on the **Report Layout** page.



2505.2.0.0

Release Note • 3/28/2025 • 1 min read

Enhancements/Modifications

The translation files for the Swedish (sv-SE) language have been updated with standard texts for better readability.



2505.1.0.0

Release Note • 3/26/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
273167	The system fails to round-off the floor space type quantity in the transport request based on the Floor Space Calculation Rounding Precision field value on the Transport Setup page. This issue occurs when the relevant item is not configured with the Item-Transport Floor Space Type page but is configured with the Default Packaging page.



2505.0.0.0

Release Note • 3/26/2025 • 3 min read

Features

With the features added in this release of the Aptean Transport extension,

- You can define the **Earliest Available Shipment Date Formula** field value on the **Transport Setup** page. This field calculates the number of days to be added to the work date to determine the earliest shipment date, based on the selected weekdays **Monday, Tuesday, Wednesday, Thursday, Friday, Saturday** and **Sunday** checkboxes on the **Transport Route** page.
- You can specify the **Shipment Method Code** field on the following pages:
 - Transport Planning
 - Transport Management
 - Transport Order
- On the **Item-Transport Floor Space Type** page, when you select a value in the **Transport Floor Space Type** field, the system automatically update in the **Transport Floor Space Type Description** field based on the **Code Caption** field value on the **Transport Floor Space Type** page.
- You can configure the **Shipping Agent (Source)** field value on the **Transport Planning** and **Transport Requests** FastTabs on the **Transport Management** pages.

Enhancements/Modifications

With this release of the Aptean Transport extension, any changes to field values on the transport planning line are automatically saved on the related **Transport Order** page, which opens when you select the **Transport Order No.** field without requiring you to leave the selected record on the **Transport Planning** page.

- Stop Sequence No.
- Temperature
- Shipment Time
- Delivery Date
- Delivery Time
- To Plan/Planned EUR
- To Plan/Planned BLK
- To Plan/Planned NA
- To Plan/Planned APAC



Transport

- Pick-up No.
- Pick-up Name
- Pick-up Country/Region Code
- Pick-up Address
- Pick-up City
- Ship-to Address
- Ship-to Name
- Ship-to City
- Ship-to Country/Region Code

UI/UX changes

The following UI/UX changes have been made in this release.

- The **Shipment Method Code** field has been added to the **Transport Planning**, **Transport Management**, and **Transport Order** pages.
- The **Transport Floor Space Type Description** field has been added to the **Item-Transport Floor Space Type** page.
- The **Shipping Agent (Source)** field has been added to the **Transport Planning** and **Transport Requests** FastTabs on the **Transport Management** pages.

Resolved issues

The following issues have been resolved in this release.

ID	Description
261515	The system incorrectly recalculates shipment dates and displays an incorrect confirmation message on the Sales Order page when the Auto Update Shipment Date toggle is turned on. This issue occurs because the system fails to validate the Source Type and Source No. fields on the Transport Route Assignments page, allowing records to be saved with missing values.
264529	An error occurs on the Transport Route Assignments page when the Route Code and Version fields have values on the lines, specific days are selected, and the Shipment Day field is set to a particular day on the Filter FastTab.



2504.1.0.0

Release Note • 3/12/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
271999	The system fails to display the following field values on the Transport Order page when the driver and truck information are configured via the Transport Route Details page. • Driver No. • Truck Code • Truck Reference Number • Trailer Code • Trailer Reference Number • License Plate • Trailer License Plate



2504.0.0.0

Release Note • 3/12/2025 • 1 min read

Features

With this release of the Aptean Transport extension, you can generate a payload that includes transport details such as transport floor space type, delivery start and end times, longitude and latitude, and field values from the **Transport Requests** page during AIP events when the [Aptean Platform Integration](#) connector is used in conjunction with the Aptean Transport extension.

Integrations

The Aptean Transport extension has been integrated with the [Aptean Integration Platform](#) connector.



2503.1.0.0

Release Note • 3/12/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
250937	The system fails to create freight cost lines on the Document Trade Costs page for a purchase order upon posting a transport order, even when the associated trade plan has the freight setup.



2503.0.0.0

Release Note • 2/26/2025 • 1 min read

Features

With this release of the Aptean Transport extension, the transport order report accurately prints the pick-up address and ship-to address based on specific conditions for sales and purchase return orders. This ensures that the correct addresses are displayed, improving the accuracy and reliability of transport documentation. To know more, see

[Transport Planning](#)



2502.0.0.0

Release Note • 2/25/2025 • 1 min read

Features

With this release of the Aptean Transport extension,

- You can define the **Floor Space Calculation Rounding Precision** field value on the **Transport Setup** page to control rounding precision for calculated floor space types in the **Transport Planning** and **Posted Transport Order** pages. For more information, see [Set up transport](#).
- The calculated floorspace related fields (Type 1 – Type 5) and fields in the **Estimated Totals for Selected Lines** group on the **Transport Planning** page have been adjusted to maintain consistent decimal precision across all relevant fields, aligning with the **Floorspace Calculation Rounding Precision** field value specified on the **Transport Setup** page.

UI/UX changes

The **Floor Space Calculation Rounding Position** field has been added to the **Transport Setup** page.

Resolved issues

The following issue has been resolved in this release.

ID	Description
259615	The system fails to add all selected transport order lines on the Transport Order page upon executing the Add to Transport Order action on the Transport Planning page. Instead, only a single transport order was added.



2501.2.0.0

Release Note • 2/14/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Transport extension, the *TransportCostMgt20FDW* codeunit and *TransportFloorTypePackag20FDW* table have been changed from internal to global. This modification enhances customization and flexibility in handling transport costs and floor type packages.



2501.1.0.0

Release Note • 1/13/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Transport extension, the *TransportCostMgt20FDW* codeunit has been changed from internal to global to enhance customization.



2501.0.0.0

Release Note • 1/8/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Transport extension, the system allows you to set the **Delivery Ending Time** field earlier than the **Delivery Starting Time** field, accommodating delivery windows that span midnight. When this occurs, you will receive a notification indicating that the **Delivery Ending Time** field value corresponds to the next delivery date.



2406.4.0.0

Release Note • 12/24/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
249517	The system incorrectly populates the Ship-to County field value on the Transport Order page with the default Sell-to Address field value, even when a custom Ship-to Address field value is selected on the Sales Order page.



2406.3.0.0

Release Note • 12/11/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
233257	An error occurs when executing the Create Warehouse Shipment action on the Transport Management page if one of the transport requests within the transport order has already been shipped.



2406.2.0.0

Release Note • 12/3/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Transport extension, when the Aptean Reporting extension is installed, the standard purchase and sales comments are copied from **Purchase Order** and **Sales Order** pages, respectively, to the **Transport Order** page. These comments are also printed in the transport order reports. To know more, see [What's new in Reporting, version 2402.14.0.0](#).



2406.1.0.0

Release Note • 10/25/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
240089	An error occurs on the Sales Order page when the Ship-to Code field value is blank, preventing the sales order creation. This issue arises only when the Powerblox Collective Invoicing app is installed.



2406.0.0.0

Release Note • 10/25/2024 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean Trade Management extension. To know more, see [What's new in Trade Management, version 2412.0.0.0](#).



2405.4.0.0

Release Note • 10/25/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Transport extension, the *GetHideValidationDialog()* event has been added to the *ConfirmAutoUpdateShipmentDate* local procedure. This allows the system to bypass the confirmation message that appears when the **Auto Update Shipment Date** toggle on the **Transport Setup** page is turned on and the shipment date in an imported sales order file does not align with the configuration on the **Transport Route Assignments** page. This functionality enables shipment date updates directly from the imported file data without manual confirmation.



2405.3.0.0

Release Note • 10/22/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Transport extension, the system automatically updates the shipment date on automated sales orders without prompting for confirmation, eliminating the need for user interaction.



2405.2.0.0

Release Note • 10/16/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Transport extension,

- You can view the total weight, volume, and transport floor space of all the transport requests in the **Total Calculated** and **Total to Plan** fields of the **Transport Planning** page. This enhancement addresses the issue reported in bug ID #231872.
- The *EntryLength* parameter has been removed from the *TransportIconMgtSetupFDW* codeunit to ensure compatibility with Business Central, version 26.

Resolved issues

The following issue has been resolved in this release.

ID	Description
231872	The system fails to update the Weight and Volume fields on the Transport Planning page with the total values when selecting all the transport planning lines.

UI/UX changes

The **Total Calculated** and **Total to Plan** fields have been added to the **Transport Planning** page.



2405.1.0.0

Release Note • 10/3/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
233983	The system fails to update the transport route code on the Warehouse Shipment page when the route code is changed on the Transport Planning page.



2405.0.0.0

Release Note • 10/3/2024 • 1 min read

Features

With this release of the Aptean Transport extension, you can:

- Create a transport order for the transfer orders.
- Assign trade plan to the document trade cost (transfer order).
- Assign item charges to purchase orders based on transport orders and trade plan.

To know more, see [What's new in Trade Management, version 2411.0.0.0](#).

Integrations

The Aptean Transport extension is integrated with the Aptean [Trade Management](#) extension to manage the transportation costs for sales, purchase, and transfer documents based on shipment methods and trade plans. To know more, see [Integrations](#).



2404.5.0.0

Release Note • 9/23/2024 • 1 min read

Enhancements/Modifications

![[ENHANCEMENT]] With this release of the Aptean Transport extension, you can select whether the system must create transport requests for packaging items when a purchase order, purchase return order, sales order, sales return order, or transfer order is released with the **Exclude Packaging from Transport** toggle. To know more, see [Set up transport](#).
This enhancement addresses the issue reported in bug ID #227779.

Resolved issues

The following issue has been resolved in this release.

ID	Description
227779	The system creates transport requests for all packaging items when a purchase order, purchase return order, sales order, sales return order, or transfer order is released.

UI/UX changes

The **Exclude Packaging from Transport** toggle has been added to the following pages:

- Transport Setup
- Purchase Order
- Purchase Return Order
- Sales Order
- Sales Return Order
- Transfer Order



2404.4.0.0

Release Note • 9/18/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
229645	The system displays an incorrect notification when changing the alternate shipping address twice on the sales header. This issue arises when the transport route assignment has an empty location code, but the address code is associated with a location.



2404.3.0.0

Release Note • 9/12/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Transport extension, the *CreateTransportOrderFDW* report has been removed, as it is not compatible with Business Central, version 25, and replaced with the existing *CreateTransportOrderTN20FDW* report.

Note

These are technical updates, and no changes are required to your setup or processes.



2404.2.0.0

Release Note • 9/2/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Transport extension, modifications have been made to accommodate the following changes:

- Enhanced application interaction: Procedures have been added to enhance the application interaction, improve upgrade tag management, streamline upgrade and installation processes, and provide additional flexibility by managing upgrades on a per-company and per-database basis.
- Application area refresh: Updates have been implemented to improve the application area refresh process by integrating a new procedure into the *Enable* codeunit.
- Improved management of install and upgrade code: The *Install* and *Upgrade* codeunits have been updated to streamline the handling of installation, reinstallation, and upgrade processes, ensuring smoother transitions and minimizing disruptions during these operations.
- Centralized license management procedures: The existing license management codeunit has been modified to use centralized license management procedures, further reducing the need for application-specific adjustments.
- Enhancements have been made to update the process within the application to handle the *User Group* and *User Group Permission Set* tables. This change ensures compatibility with current and future versions of Business Central, even when the *User Group* and *User Group Permission Set* tables are deprecated.

Note

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



2404.1.0.0

Release Note • 8/29/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
222002	The notification message incorrectly references the transfer header instead of the sales header when changing the Ship-to field value to <i>Alternate Shipping Address</i> on the Sales Order page.



2404.0.0.0

Release Note • 6/25/2024 • 1 min read

Features

With this release of the Aptean Transport extension, you can:

- Assign trade plans to transport orders.
- Create and manage transport order via sales processing.
- Assign trade plan item charge to associated source document.

UI/UX changes

The following UI/UX changes have been made in this release.

- The **Transport Cost** FastTab is added to the **Transport Order** card page.
- The **Transport Cost Calculation**, **Cost Amount Internal LCY**, **Transport Cost Calculation**, **Transport Rate Type**, and **Transport Cost Allocation** fields are added to the **Transport Order** card page.



2403.0.0.0

Release Note • 6/24/2024 • 1 min read

Features

With this release of the Aptean Transport extension, you can:

- Define the reference number for vehicles on the **Vehicle Card** page. For more information, see [Vehicles](#).
- View and edit the relevant reference numbers for trucks and trailers on the **Transport Order** page. For more information, see [Transport order](#).
- Define truck and trailer details, including their reference numbers and seal numbers, on the **Warehouse Shipment** page.
- Configure the transfer routes with the shipment method code.

UI/UX changes

The following UI/UX changes have been made in this release.

- The **Reference Number** field is added to the **Vehicles** list and **Vehicle Card** pages.
- The following fields are added to the **Transport Order** and **Posted Transport Order** pages.
 - **Truck Reference Number**
 - **Trailer Reference Number**
 - **Trailer Reference Number 2**
 - **Trailer Reference Number 3**
- The following fields are added to the **Warehouse Shipment** and **Posted Warehouse Shipment** pages.
 - **Trailer Reference Number**
 - **Seal Number**
 - **Trailer Code**
 - **Truck Code**
 - **Truck Reference Number**
- The **Shipment Method Code** field is added to the **Trans. Route Spec.** page that is accessed through the **Transfer Routes** page.



2402.1.0.0

Release Note • 5/13/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
198585	An error occurs while creating a warehouse shipment document via the Create Transport Order page when the Route Code field value is changed on the Transport Planning page.



2402.0.0.0

Release Note • 5/14/2024 • 3 min read

Features

With this release of the Aptean Transport extension, you can:

- Generate a consolidated warehouse document for all inbound requests and another for all outbound requests that are associated with the transport order. For more information, see [Transport Setup](#).
- Manage all aspects of transport orders facilitating activities like replanning, adding extra stops, creating, posting, and printing related documents, as well as initiating claims. For more information, see [Transport Management](#).
- Create cash, card, and other forms of payment related to sales and sales return orders from the **Transport Management** page using the template configured on the **Transport Setup** page. For more information, see [Transport Management](#) and [Transport Setup](#).
- Create transport route assignments for specific vendors and locations.
- Assign transport route code and stop sequence number using the available active route assignments for purchase, purchase return, transfer, and sales return orders.
- Calculate the next available receipt/shipment day, date, and alternative transport route code for purchase, purchase return, transfer, and sales return orders.

For more information, see [Transport Route Assignments](#).

- Determine whether to include transport requests from sales and purchase return orders while creating a transport order using the **Create Transport Order** action on the **Transport Planning** page. For more information, see [Create Transport Order](#).

Integrations

You can integrate the Aptean Transport extension with the Aptean [Claims](#) extension to create claims for sales and purchase documents. The system will create a claim if it has not already been generated or if the shipment/receipt has been posted.

UI/UX changes

The following UI/UX changes have been made in this release.

- The following pages are added:
 - **Transport Management**
 - **Other Stop Types** list



- **Other Stop Type Card**
- The **Transport Payment** FastTab is added to the **Transport Setup** page.
- The **Transport Route Code** and **Stop Sequence No.** fields are added to the following pages:
 - **Purchase Orders** list
 - **Purchase Order** card
 - **Purchase Return Orders** list
 - **Purchase Return Order** card
 - **Transfer Orders** list
 - **Transfer Order** card
 - **Posted Purchase Receipts** list
 - **Posted Purchase Receipt** card
 - **Posted Purchase Return Shipments** list
 - **Posted Purchase Return Shipment** card
 - **Posted Transfer Shipments** list
 - **Posted Transfer Shipment** card
- The **Transport Route Code** field is added to the following pages:
 - **Warehouse Receipts** list
 - **Warehouse Receipt** card
 - **Posted Warehouse Receipts** list
 - **Posted Warehouse Receipt** card
- The **Shipment Method Code** field is made visible on the **Purchase Order** card and **Purchase Return Order** card pages.
- The **Combine Whse. Documents** toggle is added on the **General Setup** FastTab of the **Transport Setup** page.
- The **Include Sales Return Orders** and **Include Purchase Return Orders** toggles are added to the **Create Transport Order** page.
- The *Vendor* and *Location* options are added to the **Source Type** field on both the header and lines of the **Transport Route Assignments** page.
- The **Next Available Receipt Date** FactBox is added to the **Purchase Order** card page.
- The **Next Available Shipment Date** FactBox is added to the **Transfer Order** card page.



2401.1.0.0

Release Note • 4/30/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
196275	The Transport Route Code and Stop Sequence No. fields on the Sales Order page are not editable while creating the order from the Customer Card page.



2401.0.0.0

Release Note • 4/17/2024 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean Claims extension. To know more, see [What's new in version 2402.0.0.0](#).



2302.5.0.0

Release Note • 3/7/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Transport extension, certain captions and tooltips have been curated to remove erroneous spellings and enhance the readability in French version (fr-FR).



2302.4.0.0

Release Note • 2/7/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
175473	When releasing the Purchase Order , the system encounters a deadlock, preventing successful completion of the other transactions which use the same database resource.



2302.3.0.0

Release Note • 1/24/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
172271	The Route Code value on the Transport Order header does not get updated when it is modified for the relevant transport request on the Transport Planning page.



2302.2.0.0

Release Note • 1/24/2024 • 1 min read

Enhancements/Modifications

The following enhancements have been made in this release:

- You can create a Transport Order with the Shipping Agent that is not linked to a vendor. For more information, see [Transport Planning](#).
- When posting the Transport Order, the system operates based on the configuration of the Shipping Agent and the Transport Cost Amount value. For more information, see [Posted Transport Order](#).

Resolved issues

The following issue has been resolved in this release:

ID	Description
173242	An error occurs while posting a Sales Order due to exceeding the limit of 1000 characters in the No. field on the Lines FastTab.



2302.1.0.0

Release Note • 1/10/2024 • 1 min read

Enhancements/Modifications

An event has been created for the **CreateTransportOrderTN20FDW** report to set default values for variables on the request page.

Resolved issues

The following issue has been resolved in this release:

ID	Description
167445	Unable to execute the Transport Route Assignments action on the Customer Card page when <i>French (Belgium)</i> language is selected in the settings.



2302.0.0.0

Release Note • 12/20/2023 • 3 min read

Features

With this release of the Aptean Transport extension, you can:

- Create vehicle and driver records, and allocate them for transportation processes. For more information, see [Vehicles](#) and [Drivers](#).
- Assign numbers for the new driver records. For more information, see [Transport Setup](#).
- Include essential information to the transport route such as driver, truck, trailer information, and loading sequence number. For more information, see [Transport route code setup](#).
- Assign packaging types to floor space types. For more information, see [Transport Floor Types Packaging](#).
- Calculate floor space based on item default packaging. For more information, see [Calculation for floor space based on item default packaging](#).
- Create loading dock door records that serve as access points to the loading dock area. For more information, see [Loading dock doors](#).
- Include essential information to the transport order such as driver, vehicle, and dock related information, seal numbers, overall weight, volume, and capacity of the vehicles based on floor space types. For more information, see [Add information in transport order header](#).
- View the total volume of all items within the transport order on the **Transport Order** header, **Transport Planning** page, and when utilizing the **Split Transport Order** function. For more information, see [Split transport request function](#).
- Assign the transport request to an existing transport order when the transport date and route code match the values specified on the existing transport order. For more information, see [Create transport order](#).
- Restrict the addition of new transport requests to the transport order. For more information, see [Add information in transport order header](#).

Integrations

You can integrate the Aptean Transport extension with:

- The Aptean [Reporting](#) extension to generate reports containing transport order details. This includes information about the driver, truck, trailer, and other details of the transport order.
- The Aptean [Packaging](#) extension to configure packaging for transport floor types. It also streamlines the calculation process for floor space based on item default packaging.



UI/UX changes

The following UI/UX changes have been made in this release:

- The following pages are added:
 - **Vehicles** list
 - **Vehicle Card**
 - **Drivers** list
 - **Driver Card**
 - **Vehicle Floor Space Capacities**
 - **Transport Floor Types Packaging**
 - **Loading Dock Doors**
 - **Dock Status Card**
- The **Shipping**, **Capacity**, and **Docking** FastTabs are added to the **Transport Order** card page:
- The **Driver No.**, **Truck Code**, **Trailer Code**, and **Loading Sequence** fields are added to the **Transport Route Details** page.
- The **Ship-to State** field is added to the **Ship-to Address** FactBox on the **Transport Planning** page.
- The **Pick-up State** field is added to the **Pick-up Address** FactBox on the **Transport Planning** page.
- The **Fixed** toggle is added to the **General** FastTab on the **Transport Order** card page.
- The **Driver Details** FactBox is added to the following pages:
 - **Transport Order** card
 - **Transport Route Details**
 - **Dock Status Card**



2301.6.0.0

Release Note • 12/8/2023 • 1 min read

Resolved issues

The following issues have been resolved in this release:

ID	Description
161404	An error occurs when entering the customer number in a sales order with an assigned route, specifically in the Dutch (Netherlands) and Dutch (Belgium) versions.
159888	An error occurs when attempting to post the Transport Order from the Transport Orders list page.



2301.5.0.0

Release Note • 12/7/2023 • 1 min read

Resolved issues

The following issues have been resolved in this release:

ID	Description
164066	• Upon upgrading the TRA extension to Business Central version 23, the system fails to trigger the upgrade code. • Upon turning on the Enable Trip No. Feature toggle on the Transport Setup page, the system fails to set upgrade tags accurately.



2301.4.0.0

Release Note • 12/7/2023 • 1 min read

Enhancements/Modifications

The translation files have been updated to provide precise translations for field labels, tooltips, and other interface elements, resulting in improved accuracy and an enhanced user experience.



2301.3.0.0

Release Note • 12/4/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
163472	While posting an order document with more than fifty order lines, the error message is not displayed as expected due to the exceeding variable character limit.



2301.2.0.0

Release Note • 10/17/2023 • 1 min read

Enhancements/Modifications

With this release of the Aptean Transport extension, when the **Ship-to** field is set as *Alternate Shipping Address* on the **Sales Order** page, the Ship-to Address value will be applied to the corresponding transport documents.

Resolved issues

The following issue has been resolved in this release:

ID	Description
151806	When the Ship-to field is filled on the Sales Order page, the Sell-to Address value is applied to the corresponding transport documents.



2301.1.0.0

Release Note • 9/29/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
148486	The values are not displayed in the Floor Space Type fields on the General FastTab of the Transport Order and Posted Transport Order pages.



2301.0.0.0

Release Note • 9/27/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
149242	An error occurs while releasing the purchase order or purchase return order with the French (Belgium) fr-BE language setting, as the date formulas are not translated.



1.15.113422.0

Release Note • 8/11/2023 • 1 min read

Enhancements/Modifications

The access modifiers have been adjusted to enable access to certain functions. This allows a user-friendly customization of the extension.



1.15.112583.0

Release Note • 8/11/2023 • 1 min read

Enhancements/Modifications

Modifications were made to this extension to keep it in line with the *updated* coding guidelines for Business Central.



1.15.112352.0

Release Note • 8/9/2023 • 1 min read

Enhancements/Modifications

The integration events have been added to the **TransportOrderTN20FDW** codeunit and **CreateTransportOrderTN20FDW** report, as requested by the partner, enabling them to incorporate their own functionality using these added events.



1.14.110536.0

Release Note • 7/26/2023 • 1 min read

Enhancements/Modifications

Modifications were made to this extension by adding an integration event. This allows customers to subscribe and create their own custom functionality.



1.13.109212.0

Release Note • 7/7/2023 • 2 min read

Features

With this release of the Aptean Transport extension, you can

- Enable the **Trip No.** feature by turning on the **Enable Trip No. Feature** toggle on the **Transport Setup** page. This adds the Trip No. as an additional key during the creation of the transport request. To know more, see [Trip No. Setup](#).
- Assign a unique trip number to each transport request. When you release the document, a separate transport request will be created for each combination of Location Code, Shipment Date, and Trip No. values. With this, you can split a document that is too large to fit into a single transport order.
- Split the existing transport request and assign them to a new or different Transport Request using the **Split Transport Request** function. This is achieved by providing the New Trip No. for the existing Transport Request to split or extract a specific line from it. To know more, see [Split Transport Request function](#).

UI/UX changes

The following UI/UX changes have been made in this release:

- The **Split Transport Request** page is added.
- The **Split Transport Request** function is added on the **Transport Planning** page.
- The **Enable Trip No. Feature** toggle is added to the **Transport Setup** page.
- The **Trip No.** field is added to the following documents:
 - Sales Order lines
 - Sales Return Order lines
 - Transfer Order lines
 - Purchase Order lines
 - Purchase Return Order lines
 - Transport Request
 - Transport Planning
 - Transport Orders and
 - Posted Transport Order pages.
- The **Weight** field is added to the **Estimated Totals for Selected Lines** section on the **Transport Planning** page.



- The **Estimated Floor Space Selected Lines** FastTab on the **Transport Planning** page is renamed to **Estimated Totals for Selected Lines**.



1.12.107656.0

Release Note • 7/7/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
132235	An error is displayed when a user changes the Requested/Promised Delivery Date field on the Sales Order page if language is set to <i>Dutch (Netherlands)</i> or <i>Dutch (Belgium)</i> .



1.11.105573.0

Release Note • 6/27/2023 • 1 min read

Resolved issues

The following issue has been resolved in the release:

ID	Description
127052	Errors occur when processing sales documents, even if the user has Basic Permissions.



1.10.100108.0

Release Note • 5/26/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
118949	The system does not display the error message related to errors encountered while posting the Transport Orders and Purchase Orders.



1.9.87335.0

Release Note • 4/3/2023 • 1 min read

Enhancements/Modifications

The Transport extension has been updated for the Dutch language codes [nl-BE] and [nl-NL] to cater to the Netherlands and Belgium markets.



1.8.80378.0

Release Note • 4/3/2023 • 1 min read

Features

With this release of the Aptean Transport extension, you can access the following cues from the Role Center page for the Business Manager, and Shipping and Receiving - Warehouse Management System roles:

| Cue | | --- | --- | | Transport Requests and Orders |

- To Plan
- Changed Transport Requests
- Deleted Transport Requests
- Transport Orders Today
- Transport Orders

|



1.8.79126.0

Release Note • 4/3/2023 • 1 min read

Enhancements/Modifications

The Aptean Transport extension is now updated with minimal API to improve extensibility. The extensibility property applies to tables, pages, and other object types of this extension.

Note

Minimal APIs are simplified approach for building fast HTTP APIs with ASP.NET Core. For more information, see [Minimal APIs overview](#) | [Microsoft Learn](#).



1.7.74401.0

Release Note • 4/3/2023 • 1 min read

Resolved issues

The following issues have been resolved in this release:

ID	Description
88283	When Customer Item Catalog extension is installed, the Customer Address function does not work on the Sales Order page even after turning off the Item Catalog Mandatory toggle on the respective Customer page.
85503	The Transport Route Stop Sequence page is accessed from the Search/Tell Me function.



1.6.64620.0

Release Note • 4/3/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
68379	On the Transport Setup page, the Floor Space Type fields display only the Code field in the lookup table.



1.5.54502.0

Release Note • 4/3/2023 • 1 min read

Features

With the features added in this release of the Aptean Transport extension, you can:

- Create transport routes for specific periods of time and assign the weekdays on which the route works. For more details, [see here](#).
- Open the transport route assignments from a customer record, in addition to Transport Route Card. For more details, [see here](#).
- Arrange the sequence of transport records for a specific route and day, essentially deciding the priority of shipments. For more details, [see here](#).
- Create multiple warehouse shipments and transport orders at the same time. For more details, [see here](#).
- Copy an existing route to a new route for further editing. For more details, [see here](#).



1.4.47117.0

Release Note • 4/3/2023 • 1 min read

Enhancements/Modifications

A localized version of the Transport extension is made available for the Switzerland market with the addition of the German language code [de-CH].

Resolved issues

The following issues have been resolved in this release:

ID	Description
32158	An error was triggered on posting a Transport Order with an empty Shipping Agent field.
32310	When a Purchase Order is created, the Posted Transport Order No. field is empty on the purchase order header.
38982	The Shipment Date on the Transport Request page is filled with the Shipment Date on the Sales Order line.



1.3.43737.0

Release Note • 4/3/2023 • 1 min read

Enhancements/Modifications

Minor technical changes were made to keep our apps in line with the *updated* coding guidelines for Business Central.



Introduction

Article • 4/3/2023 • 2 min read

The Aptean Transport (TRA) extension allows you to control inbound and outbound transport. Transport requests can be scheduled in transport planning, and transport orders can be created to be sent to your shipping agent.

With this extension, you can create transport requests while releasing the following documents:

- Purchase Orders
- Sales Orders
- Purchase Return Orders
- Sales Return Orders
- Transfer Orders

When an order is released, a Transport Request is automatically generated for each Location/Shipment date combination. On enabling the Trip No. feature, the **Trip No.** value also acts as an additional key which is used to assign specific document lines to separate transport requests. Upon the release of the document, a separate transport request will be used for each combination of Location Code, and Shipment Date.

The **Transport Planning** page provides an overview of all transport requests, making it easier to combine multiple requests into a transport order. Since the source documents of a transport request can change over time, it can be a challenging job to schedule transport. With useful functions and insights, the **Transport Planning** page helps you follow up on changes and estimate the floor space for a transport order.

The **Transport Routes** page provides the ease to create routes for specific periods of time, and further to a specific customer via the **Transport Route Assignment** page.

Furthermore, the extension gives insight into the transport costs by creating purchase orders for the shipping agent.



General setup

Article • 9/23/2024 • 1 min read

The following setups are required.

- [Manage permission sets](#)
- [Set up transport](#)
- [Link vendors to shipping agents](#)
- [Set up transport requests](#)



Manage permission sets

Article • 10/21/2024 • 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 *TRANSPORTFDW*.

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 *TRANSPORTBASICFDW*.

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.



Transport

The associated fields are automatically updated based on the entered value. The user has the necessary permissions to use the features of the Aptean Transport extension, ensuring secure and role-based access.



Set up transport

Article • 5/27/2026 • 3 min read

You must perform the following setup to use the Aptean Transport extension.

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

Field	Description
Transport Order Nos.	Select the number series code to be used when creating a transport order.
Driver Nos.	Select the number series code to be used to assign numbers to new drivers.
Earliest Available Shipment Date Formula	Enter the formula used to calculate the number of days added to determine the earliest shipment date for a transport order. The formula must contain a positive number and end with the appropriate letter for your region.
Auto Update Shipment Date	Turn on the toggle to update the shipment day automatically to the next available shipment day, based on the transport route assignments, in case no transport route is running on the day of the currently assigned shipment date. If you turn off this toggle, you must manually select another shipment day.
Update Shipment To	Select whether the shipment date is calculated later or earlier than the current shipment date based on the configuration done on the Transport Route Assignment page. This field is editable only when the Auto Update Shipment Date toggle is turned on and the Aptean Shop Floor Logistics extension is installed.
Floor Space Type	Select the floor space types to display on the Transport Planning , Split Transport Request , and Transport Orders pages. You can select five values in each of the Floor Space Type field, to indicate the number of floor spaces needed per transport request. They help you make informed decisions when planning transport orders.



Enable Trip No. Feature	Turn on the toggle to utilize the trip number feature and display the Trip No. fields in transport request related documents. For more information, see Set up trip number .
Combine Whse. Documents	Turn on the toggle to generate a consolidated warehouse document for all inbound and outbound documents. This function consolidates all outbound requests into a single warehouse shipment and all inbound requests into a single warehouse receipt for the transport order. If you turn off this toggle, the system creates a warehouse document for each inbound and outbound request.
Exclude Packaging from Transport	Turn on the toggle if you want the system to not create transport requests for packaging items when the purchase order, purchase return order, sales order, sales return order, or transfer order is released. You can override this selection on a document level.
Floor Space Calculation Rounding Precision	Enter the rounding precision for floor space calculations. If no value is entered, the system defaults to <i>0.1</i> . This ensures accurate and consistent rounding of calculated floor space values in transport planning and posted transport orders.
Skipped Requests Deletion	Specify a negative date formula to define how long the system retains skipped transport requests before deleting them automatically. For example, enter <i>-1W</i> to delete skipped requests older than 1 week, or <i>-1M</i> to delete those older than 1 month. If the field is left blank, skipped requests are not deleted. This field only accepts negative date formula values (for example, <i>-1W</i> , <i>-1M</i>). Positive values are not accepted.
Transport Order Custom Category Code	Select the custom category code for transport orders. This code must match the custom category configured on the Document Publication Report Selection page.
Posted Transport Order Custom Category Code	Select the custom category code for posted transport orders. This code must match the custom category configured on the Document Publication Report Selection page.



 Note

The **Transport Order Custom Category Code** and **Posted Transport Order Custom Category Code** fields are only visible when the Aptean [Document Publication](#) extension is installed.

3. On the **Posting** FastTab, enter the required information in the following fields:

Field	Description
Posted Transport Order Nos.	Select the number series code to be used for posted transport orders.
Create and Post Purchase Order	Turn on this toggle if you want the system to automatically create a purchase order containing transport costs and post it when the transport order is posted. If you turn on this toggle, you need to select a value in the Item No.Transport Cost Posting field to determine item number for transport order costs. You can create a new item specifically for transport costs. This item can be a service-item. For more information on the costing methods for items, see Costing methods for types of items. You must link a vendor to a shipping agent so the linked vendor is used for creating the purchase order. For more information, see Link vendors to shipping agents.
Item No. Transport Cost Posting	Select the item number which is to be used for posting the transport order costs.
Require Receive	Turn on this toggle if you want the system to require a receipt document upon posting a transport order.
Require Shipment	Turn on this toggle if you want the system to require a receipt document upon posting a transport order.

4. On the **Transport Payment** FastTab, you can configure templates for creating cash, cards, and other forms of payment related to sales and sales return orders that are associated with the transport order. Enter the required information in the following fields:

Field	Description
Cash Receipt Jnl. Template	Select the template that must be used to create cash receipt payments related to transport in the general ledger.
Card Receipt Jnl. Template	Select the template that must be used to create card receipt payments related to transport in the general ledger.



Other Receipt Jnl. Template

Select the template that must be used to create other forms of payments related to transport in the general ledger.

For more information about creating cash, cards, and other forms of payments, see [Transport Management](#).

5. On the **Icons** FastTab, you can set up the icons that are displayed on the transport planning lines. When installing the extension, the icon setup is automatically filled with default icons. You can change the default setup as required. For more information, see [Set up icons](#).
6. On the **Report** FastTab, you can set up a report for the transport order before printing or emailing transport orders.
In the **Report ID** field, select the required code.

Note

The standard **Report ID** field value for the Aptean Transport extension to print report layout are as follows:

Version	Report ID
Business Central 2022	60132/60133
Business Central 2023	60133

In Business Central 2022 version, Report ID 60133 can be used only if the **Enable Trip No. Feature** toggle is turned on.

7. In the **Posted Transport Order Report ID** field, select the report to use when printing posted transport orders.
To generate the **Transport Order** report, the Aptean [Reporting](#) extension must be installed. For more information, see [Transport Order Report](#).

Set up trip number

When the **Enable Trip No. Feature** toggle is turned on, the **Enable Feature "Trip No." Setup** wizard opens.

The following procedure outlines the setup in the **Enable Feature "Trip No." Setup** wizard.

1. Turn on the **Enable Feature** toggle.
2. Select **Next**.
3. Turn on the **I accept the data update** and **I understand** toggles.
4. Select **Finish**.

The trip number feature setup is complete.



 Note

- This feature will be automatically enabled when you upgrade to BC 23.
- By default, this toggle is turned off. If the toggle is turned off, the **Trip No.** fields are not visible on any of the documents. Once this feature is enabled, you cannot turn off the toggle.

Set up icons

The following procedure outlines how to set up icons.

1. Select **New**.

The **Select Picture** window opens.

2. Select the file and then select **Open**.

3. Select an image that must be displayed for the transport request with the status field set to *New*.

The icon setup is completed.

You can repeat the steps for the remaining icons.



Link vendors to shipping agents

Article • 5/14/2024 • 2 min read

If the **Create and Post Purchase Order** toggle on the **Transport Setup** page is turned on, the system will automatically generate a purchase order upon posting a transport order. The vendor linked to the shipping agent in the transport order will be used as the vendor for creating the purchase order. For more information, see [Post transport orders](#).

Note

If the shipping agent in the transport order is not linked with the vendor, the system will not generate a purchase order upon posting the transport order, even when the **Create and Post Purchase Order** toggle on the **Transport Setup** page is turned on.

To link vendors to shipping agents:

1. Select the Search icon , enter **Shipping Agents**, and then choose the related link.
The **Shipping Agents** page opens.
2. In the **Vendor No.** field, select the required vendor that you intend to link to the selected shipping agent.
The vendor is linked to a shipping agent. While posting a transport order, the vendor that is linked to the relevant shipping agent is used for creating the purchase order.



Set up transport requests

Article • 6/5/2026 • 2 min read

You can set up transport requests to be automatically created after releasing a inbound or outbound orders.

The following procedure outlines how to set up transport requests.

1. Select the Search icon , enter **Shipment Methods**, and then choose the related link.
2. Select the **Require Inbound Transport Order** checkbox for the required code.
An inbound transport request will be automatically created after releasing a sales return order or purchase order.
3. Select the **Require Outbound Transport Order** checkbox for the required code.
An outbound transport request will be automatically created after releasing a sales order, purchase return order, or transfer order.
4. Select the **Freight Cost Calculation** checkbox to enable freight cost calculation and cost assignment for the selected shipment method. If this checkbox is cleared, the system does not calculate or assign freight costs for shipments that use the shipment method.



Transport route code setup

Article • 4/3/2023 • 5 min read

Transport routes can be set up via the **Transport Routes** page.

You can view/edit a transport route or create a new transport route.

Once the user creates/opens a transport route, they can perform the following:

- State the dates between which the route version applies
- Select the days of the week when the route version applies
- Block the transport route for use

 Note

You can create as many route versions as required.

 Note

This setup helps define the logistical time for a specific route version, weekday, and shipping agent combination in Aptean Shop Floor Logistics extension.

You can also assign a **Shipping Agent** to a Route Version for a specific shipment day, from the **Transport Route Details** page. Multiple route versions are allowed for an overlapping time period if the weekdays are different. For example, a special route version can be created for a festival season with weekdays that don't coincide with the other existing route version.

 Important

Only one version apart from the default version can exist for the same Source No., Address Code, Location Code, and Route Code combination.

1. Select the Search icon  , enter **Transport Routes**, and then choose the relevant link.
2. Select the desired code to open the **Transport Route** card.
3. On the action bar, select **Transport Route Details**.
The **Transport Route Details** page opens.
4. Fill in the fields as follows:

Field	Description
-------	-------------



Version Code	Select the required version code for which you want to configure transport route details.
Shipment Day	Select the specific day for applying the configured transport route details when the transport route is assigned.
Shipping Agent Code	Select the code of the shipping agent that you want to assign to the selected version of the transport route.
Logistical Time	Enter the logistical time for the selected version of the transport route.
Driver No.	Select the number of the driver whom you want to assign to the selected version of the transport route.
Truck Code	Select the code of the truck that you want to assign to the selected version of the transport route.
Trailer Code	Select the code of the trailer that you want to assign to the selected version of the transport route.
Loading Sequence	Enter the number of the loading sequence which helps you to sort and prioritize the transport order.

You can view the **Driver Details** FactBox, which provides insights into key aspects of the driver, on the **Transport Route Details** page. For more information, see [Driver Details FactBox](#).

You can assign a route to customer for a specific period of time in the **Transport Route Assignment** page. There is the possibility to filter the page by Transport Route, Transport Route Version, Shipment Day, and Source No.

There is also the possibility to change the order of the Stop Sequence Nos., for a Shipment Day.

! Note

In the Shop Floor Logistics extension, on the **Shop Floor Activities** page, you can search or filter the page based on the **Transport Route Code**. This field is only shown when the Transport application is installed in the system. The Transport Route Code values are inherited in this page from the source documents such as sales orders.

! Important

The **Logistical Time** is shown in the **Shop Floor Activities** page for each warehouse request. If the **Shipping Agent**, **Transport Route Code**, **Shipment Date**, and **Active Version** on the sales order matches with the corresponding fields on the **Transport Route Details** page, the logistical time is inherited from the **Transport Route Details** page. Otherwise, the logistical time is inherited from either the **Customer** or the **Ship-to Address** page.



Changes made to transport route

Article • 4/3/2023 • 1 min read

When active route assignments exist for a Transport Route and you make changes to the Starting Date and/or Ending Date, the system displays a message asking whether you want to continue with the change. On confirmation, the system makes the same changes to the active route assignments for the customer.

If the date change affects the route assignment so that it isn't valid anymore e.g., the dates don't fall in the range, the assignment is deleted.

When a Shipment Day is removed from the route version, the system removes the same from the assignment.

Note

If the removed Shipment Day is the only weekday the version runs on, the system deletes the entire assignment.

When a Transport Route is deleted, the system deletes the Transport Route Details and any related route assignments.



Copy transport route version

Article • 4/3/2023 • 2 min read

You can copy a transport route version along with the associated route assignments to a new route or an already existing route.

To copy a transport route version, follow these steps:

1. Select the Search icon , enter **Transport Routes**, and then choose the related link.
The **Transport Routes** list page opens.
2. Select the desired **Code** to open the **Transport Route** page.
3. Select the Edit/View icon.
4. Select the version to be copied.
5. On the action bar, select **Copy Transport Route**.
A new page appears.
6. Enter the following:
 - From
Version
Route Code
 - To
Version
Starting Date
Ending Date
7. Turn on the **Copy Transport Route Assignments** toggle to copy the route assignments associated with the original route version.
8. Turn on the **Copy Transport Stop Sequence** toggle to copy the stop sequence associated with the copied transport route assignment. This toggle works only when the **Copy Transport Route Assignment** toggle is on. Otherwise, the **Copy Transport Stop Sequence** toggle stays off and is not editable.



Transport route code visibility

Article • 4/3/2023 • 1 min read

The Transport Route Code is visible on the following pages:

- Sales Order
- Sales Return Order
- Sales Shipment
- Posted Sales Shipment
- Warehouse Shipment
- Posted Warehouse Shipment
- Sales Invoice
- Posted Sales Invoice
- Return Receipt
- Posted Return Receipt
- Sales Credit Memo
- Posted Credit Memo
- Transport Request
- Transport Planning
- Posted Transport Order



Transport route assignments

Article • 7/22/2025 • 10 min read

The **Transport Route Assignments** page allows you to create route assignments for specific customers, vendors, and locations. These assignments automatically assign transport routes and update stop sequence numbers to the following documents:

- Purchase orders
- Purchase return orders
- Sales orders
- Sales return orders
- Transfer orders

These details are also available in the following posted documents:

- Posted purchase receipts
- Posted purchase return shipments
- Posted return receipts
- Posted sales credit memos
- Posted sales invoices
- Posted sales shipments
- Posted transfer shipments

Note

The transport route code is also available on the relevant **Warehouse Shipment** and **Warehouse Receipt** pages. Also, the **Trailer Reference Number**, **Seal Number**, **Trailer Code**, **Truck Code**, and **Truck Reference Number** fields are available on the **Warehouse Shipment** and **Posted Warehouse Shipment** pages. To know about these fields, see [Transport order](#).

This functionality activates whenever the relevant customers, vendors, or locations are involved in the documents and when the shipment/receipt dates align with the specified timeframes and the selected days of the week.

Note

It is not possible to have two transport route assignments with the same customer, ship-to address, and location for the same weekday, unless one is a default version and the other is non-default.



 Note

When the **Allow Manual Transport Route Assignment** toggle is turned on in the **Sales Order** page, you can manually select any **Transport Route Code** and **Shipment Date** on the **Sales Order** page regardless of whether the transport route is assigned to the Customer. When the toggle is turned off, you can only select **Transport Route Codes** that are assigned through the customer's transport route assignments.

To create or filter transport route assignments, follow these steps:

1. Open the **Transport Route Assignments** page.
2. On the action bar, select **New** to create a new transport route assignment line.
3. In the **Source Type** field, select the relevant source type.
 - *Customer* – For sales and sales return orders.
 - *Vendor* – For purchase and purchase return orders.
 - *Location* – For transfer orders.

 Note

The **Source No.** field value is mandatory when the **Source Type** field is set to *Customer*, *Vendor*, or *Location*.

7. In the **Source No.** field, select the number or code that identifies the customer, vendor, or location. This value corresponds to the value selected in the **Source Type** field.
For Location source type, this value is considered as the Transfer-from location of the transfer order.
8. In the **Location Code** field, select the relevant code of the location.
For location source type, this value is considered as the Transfer-to location of the transfer order.

 Note

This field must have a value for the location source type.

9. Fill in the necessary information such as address code, route code, and route version, in the respective fields.

 Note

The **Address Code** field displays the ship-to address for customer source types and the order address list for vendor source types. This field remains empty for location source types.



10. In the **Starting Date** and **Ending Date** fields, enter the dates for the effective period of the transport route assignment.

Note

The selected dates should fall within the starting and ending dates of the transport route version.

11. In the day fields, select the specific days of the week during which the transport route assignment should be effective.

Note

You can only select days that are configured for the route version on the **Transport Route** page.

12. On the action bar, select **Edit Stop Sequence** to set stop sequence numbers based on the shipment/receipt day.
For more information, see [Edit the stop sequence](#).
A new transport route assignment is successfully created and configured.
13. On the **Filters** FastTab, fill in the fields as follows to filter the existing transport route assignments.

Field	Description
Transport Route Code	Select the transport route code for filtering the transport route assignments.
Transport Route Version	Select the relevant transport route structure for the selected transport route code. This field is editable only when the Transport Route Code field has a value.
Source Type	Select the source type for filtering. <i>Customer</i> : Filters the transport route assignments that are applicable for sales orders and sales return orders. <i>Vendor</i> : Filters the transport route assignments that are applicable for purchase orders and purchase return orders. <i>Location</i> : Filters the transport route assignments that are applicable for transfer orders. Blank: Filters the transport route assignments that are applicable for all the above-mentioned orders.
Source No.	Select the source number such as customer number, vendor number, or transfer from location based on which you want to filter the transport route assignments. This value corresponds to the value selected in the Source Type field. For location source type, this value is considered as the Transfer-from location of the transfer order.
Shipment Day	Select a specific day of the week for filtering. This value is considered as the day of shipment for outbound documents (such as sales, transfer, and purchase return



orders) or the day of receipt for inbound documents (such as purchase and sales return orders).

The transport route assignments are filtered and displayed based on the filters applied.

You can open the Transport Route Assignments page from any one of these pages:

- **Transport Route**
- **Customer**
- **Ship-to Address**

To open transport route assignments card

You can open the **Transport Route Assignments** card using the following steps.

- From the **Transport Route** card
 1. Select the **Search** icon , enter **Transport Routes** and then choose the related link.
The **Transport Routes** list page opens.
 2. On the action bar, click **Transport Route Assignments**.
- From the **Customer**
 3. Select the **Search** icon , enter **Customers**, and then choose the related link.
 4. Select and click the required **No.** to open the **Customer** card page.
 5. Select **Related** > **Customer** > **Transport Route Assignments**.
- From the **Ship-to Address**
 6. Select the **Search** icon , enter **Customers**, and choose the related link.
 7. Select and click the required **No.** to open the **Customer** card page.
 8. Select **Related** > **Customer** > **Other** > **Ship-to Addresses**.
 9. On the Ship to Address List, on the action bar, select **Related** > **Transport Route Assignments**.

FactBoxes

Next Available Receipt Date FactBox

The **Next Available Receipt Date** FactBox provides details about the next alternative day and date for receipt, and the transport route that can be assigned to the receipt based on the active route assignments. You can view this



FactBox on the purchase, and sales return orders.

In documents such as purchase and sales return orders, the system automatically assigns the transport route code, and stop sequence number based on the active route assignments applicable for the vendor or customer and the expected receipt date specified on the header. Furthermore, utilizing this data, the system computes the next available expected receipt date, along with the corresponding day, and transport route code, which is then presented in this FactBox.

The **Next Available Receipt Date** FactBox displays the following information:

Field	Description
Expected Receipt Day	Specifies the next alternative day available for scheduling the receipt based on the active route assignments.
Expected Receipt Date	Specifies the next alternative date available for scheduling the receipt based on the active route assignments.
Transport Route Code	Specifies the alternative transport route available for scheduling the receipt based on the active route assignments.

Next Available Shipment Date FactBox

The **Next Available Shipment Date** FactBox provides details about the next alternative day and date for shipment, and the transport route that can be assigned to the shipment based on the active route assignments. You can view this FactBox on the sales, transfer, and purchase return orders.

In documents such as sales, purchase return, and transfer orders, the system automatically assigns the transport route code, and stop sequence number based on the active route assignments applicable for the customer, vendor, or location, and the shipment date specified on the header. Furthermore, utilizing this data, the system computes the next available shipment date, along with the corresponding day, and transport route code, which is then presented in this FactBox.

The **Next Available Shipment Date** FactBox displays the following information:

Field	Description
Shipment Day	Specifies the next alternative day available for scheduling the shipment based on the active route assignments.
Shipment Date	Specifies the next alternative date available for scheduling the shipment based on the active route assignments.



Transport Route Code	Specifies the alternative transport route available for scheduling the shipment based on the active route assignments.
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Other Stop Types

Article • 5/14/2024 • 2 min read

Other Stop Types can be used as additional destinations or stops that are not standard transport requests. These stops can be added to the transport order for various purposes, such as making additional pickups or deliveries, stopping for the company itself, or for any other specific reasons along the transportation route. To manage Other Stop Types, follow these steps:

1. Select the Search icon , enter **Other Stop Types**, and then choose the related link.
The **Other Stop Types** page opens.
2. On the action bar, select **New**.
Alternatively, select the required **Code** to open the relevant stop.
The **Other Stop Type Card** page opens.
3. On the **General** FastTab, enter the code and description for the stop in the respective fields.
4. On the **Address & Contact** FastTab, fill in all the required details related to the stop such as address, contact information, and any other relevant information.

Now, a new Other Stop Type is created and can be utilized within the transport order as needed. For more information, see [Transport Management](#).



Edit the stop sequence

Article • 4/3/2023 • 1 min read

The **Edit Stop Sequence** page lets you control the order in which the shipments are delivered to different customers on a particular shipment day.

1. Navigate to the **Transport Route Assignment** page.
2. Select a desired line.
3. On the action bar, select the **Edit Stop Sequence**.
The **Transport Route Stop Sequences** page opens.

You can change the sequence by changing the stop sequence numbers or by using the **Move Up/Move Down** actions.

Select the **Update Stop Sequence** action after changing the sequence to rearrange the list in the proper order.

Note

The stop sequence numbers are automatically updated when you change the shipment day.

On the **Transport Route Stop Sequences** page, when you select or deselect a weekday and use the **Update Stop Sequence** button, the changes are reflected in the **Edit Stop Sequence** page.



Vehicles

Article • 6/24/2024 • 4 min read

The **Vehicle Card** page provides a comprehensive overview of all vehicle-related aspects, allowing you to access and manage essential information related to vehicles in your organization.

To create a vehicle record

- 1. Select the Search icon  , enter **Vehicles**, and then choose the related link.
The **Vehicles** list page opens.

 **Note**

On the **Vehicles** list page, you can edit the existing vehicle records by selecting **Edit List** on the action bar.

- 2. On the action bar, click **New** to create a vehicle record.
Or
Select the required **No.** to open the relevant vehicle record.
The **Vehicle Card** page opens.
- 3. On the **General** FastTab, fill in the fields as follows:

Field	Description
Code	Enter the code that identifies the vehicle.
Description	Enter the name of the vehicle.
Type	Select the type of vehicle for which you want to create the record. The available options are <i>Cab, Trailer, Van, Straight Truck, Chassis, Container, or Car.</i>
Reference Number	Enter the reference number that can be used as an additional identifier for tracking the vehicle.
License Plate	Enter the license plate for the vehicle, which is a distinct combination of letters, numbers, and possibly special characters issued by the government to uniquely identify the vehicle.
License Country/Region	Select the code of the country or region where the vehicle’s license plate is registered.
License State	Enter the name of the state where the license plate for the vehicle is registered.



VIN	Enter the Vehicle Identification Number (VIN) for the vehicle, which serves as a unique alphanumeric code for identifying the vehicle and its characteristics.
Weight Capacity	Enter the maximum weight that the vehicle can safely carry, including the weight of the goods being transported. Modifying this value, even after assigning the vehicle to the transport order, will be considered, leading to adjusting the calculations on the existing relevant transport orders based on the modified value.
Volume Capacity	Enter the maximum interior space available in the vehicle for carrying goods or cargo. Modifying this value, even after assigning the vehicle to the transport order, will be considered, leading to adjusting the calculations on the existing relevant transport orders based on the modified value.
Unload Left Side	Turn on the toggle if the goods can be unloaded from the left side of the vehicle.
Unload Right Side	Turn on the toggle if the goods can be unloaded from the right side of the vehicle.
Unload Back Side	Turn on the toggle if the goods can be unloaded from the back side of the vehicle.

4. On the action bar, select **Actions > Floor Space Capacity** to configure the capacity of the vehicle using the floor space type. For more information, see [Vehicle Floor Space Capacities](#).



Drivers

Article • 12/26/2023 • 4 min read

The **Driver Card** page provides a comprehensive overview of drivers, allowing you to access and manage essential information related to drivers, including driver profiles and licensing details, within your organization.

To create a driver record

- 1. Select the Search icon  , enter **Drivers**, and then choose the related link.
The **Drivers** list page opens.
- 2. On the action bar, click **New** to create a driver record.
Or
Select the required **No.** to open the relevant driver record.
- 3. On the **General** FastTab, fill in the fields as follows:

Field	Description
No.	Specifies the number of the driver that is assigned based on the number series selected on the Transport Setup page.
Employee No.	Select the number of the employee for whom you want to create the driver record.
Full Name	Specifies the driver's full name, including all first, middle, and last names.

- 4. On the **Personal Information** FastTab, fill in the field as follows:

Field	Description
First Name	Enter the first name of the driver.
Middle Name	Enter the middle name of the driver.
Last Name	Enter the last name of the driver.
Phone No.	Enter the contact phone number of the driver.

 **Note**

The values in the above fields are automatically inherited from the selected employee. You can modify these values even after it is inherited.



5. On the **License** FastTab, fill in the field as follows:

Field	Description
License No.	Enter the license number of the driver.
License Issue Date	Select the date when the driver’s license was issued.
License Expiration Date	Select the date when the driver’s license will expire. The selected date must be later than the License Issue Date. You cannot select a date that has already passed or a date that matches the work date.
License Country/Region	Select the code of the country or region where the driver’s license was issued.
License State	Enter the name of the state where the driver’s license was issued. This field is visible only when the selected License Country/Region is set as United States (US).
Commercial License Class	Select the class of the driver's license, based on the type of commercial vehicles they are qualified to operate.

Driver Details FactBox

You can view the **Driver Details** FactBox which provides insights into key aspects of the driver-related information.

The **Driver Details** FactBox displays the following details:

Field	Description
Driver No.	Specifies the number of the driver assigned for the transportation.
Driver’s Full Name	Specifies the driver's full name, including all first, middle, and last names.
License Expiration Date	Specifies the date when the driver’s license will expire.
License Status	Specifies the status of the license whether it is <i>Valid</i> , <i>Expired</i> , or <i>Expires Today</i> .

You can view the **Driver Details** FactBox on the following pages:

- **Transport Order** card
- **Transport Route Details**
- **Dock Status Card**



Loading dock doors

Article • 12/26/2023 • 1 min read

Loading dock doors serve as access points to the loading dock area, playing a vital role in facilitating the efficient flow of goods in and out of the facility. They come in various types, sizes, and features, including seals for weather protection and safety measures. They contribute to operational efficiency, facility security, and streamlined logistics by providing a controlled gateway for loading and unloading operations.

On the **Loading Dock Doors** page, follow these steps to configure the loading dock door:

- 1. Open the **Loading Dock Doors** page.
- 2. On the action bar, select **New**.
- 3. Fill in the fields as follows:

Field	Description
Code	Enter the code of the loading dock door that you want to create.
Description	Enter the description of the loading dock door that you want to create.
Type	Select the type of loading dock door, indicating its designated purpose as either <i>Shipping</i> , <i>Receiving</i> , or <i>Both</i> .
Location Code	Select the code of the location for which you want to use the selected loading dock door.



Transport floor space types

Article • 9/24/2025 • 13 min read

Transport Floor Space Types are used for calculating the floor space which is needed for transport. The load per Transport Floor Space Type can be set up per item or per customer/item combination. Based on this load, the system calculates the number of Floor Spaces required.

For example, when the load per Transport Floor Space Type for an item is set to 120 pieces and the quantity in the sales order is 140 pieces, the calculated number of Floor Spaces = $140/120=1.2$. The calculated number is rounded to 1 decimal place.

Setup transport floor space types

Before setting up the load per item, the Transport Floor Space Types must be set up. You can set up any number of Floor Space Types. However, a maximum of five only would be visible on the planning screen.

1. Select the Search icon , enter **Transport Floor Space Types**, and then choose the related link.
2. Enter the **Code**.
3. Enter the **Code Caption**.
4. Enter the **Length**.

The length can be noted up to a maximum of two decimal places. This field is informative and is not used for the calculation of the number of Transport Floor Space.

5. Enter the **Width**.

The width can be noted up to a maximum of two decimal places. This field is informative and is not used for the calculation of the number of Transport Floor Space.

A Transport Floor Space Type is now set up. You can repeat these steps to create any number of Floor Space Types.

Transport floor space type for items

1. Select the Search icon , enter **Items**, and then choose the related link.
2. Select the required **No**.
3. On the action bar, select **More Options** > **Related** > **Item** > **Transport Floor Space Type Setup**.
4. Select **New**.

The **Item-Transport Floor Space Type** page opens.

It is possible to set a different Transport Floor Space Type Default per Item Variant. This field is optional.

5. In the **Item Variant** field, select a value.



6. In the **Transport Floor Space Type** field, the system automatically updates the **Transport Floor Space Type Description** field value based on the **Code Caption** value on the **Transport Floor Space Type** page.
7. In the **Transport Floor Space Type** field, based on the **Code Caption** field value on the **Transport Floor Space Type** page.
8. In the **Unit of Measure Code** field, select the required **Code**.
9. In the **Quantity per Transport Floor Space Type** field, enter the desired value.
The quantity specifies how many items with that unit of measure code can be placed on the Transport Floor Space Type.
10. Select the **Default** checkbox. The first transport floor space type created for the item or item variant is automatically set as default value in the **Transport Floor Space Type** field. The default transport floor space type is used when creating a transport request unless a value is specified in the **Req. Transport Floor Space Type** field on the **Ship-to Address** page, which overrides the default. Other floor space types remain available for reference.

Change default transport floor space type

Only one Transport Floor Space Type can be set up as default. It is possible to change the default Transport Floor Space Type if there is more than one Transport Floor Space Type for the Item or Item Variant.

1. Select the required **Item Variant**.
2. On the action bar, select **More options** > **Actions** > **Set as Default**.

Another Transport Floor Space Type is now set up as **Default**.

Required transport floor space type for customers

When there are some specific agreements made for a customer about the Transport Floor Space Type, it is possible to link a Transport Floor Space Type to a customer. If a Transport Floor Space Type is linked to a customer, this Transport Floor Space Type is used as default and overrules the default that is set for the item.

1. Select the Search icon , enter **Customers**, and then choose the related link.
2. Select the required customer **No**.
3. On the action bar, select **More Options** > **Related** > **Customer** > **Ship-to Addresses**.
4. Select the required **Code**.
The **Ship-to Address** page opens.
5. In the **Req. Transport Floor Space Type** field, select the required **Code**.

The Required Transport Floor Space Type is now set up for the customer.



Vehicle Floor Space Capacities

On the **Vehicle Floor Space Capacities** page, follow these steps to configure the capacity of the vehicle in relation to the floor space types:

- 1. Open the **Vehicle Floor Space Capacities** page.

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Note

You can also access this page from the **Vehicle Card** page by selecting **Actions > Floor Space Capacity** on the action bar.

- 2. On the action bar, select **New**.
- 3. Fill in the fields as follows:

Field	Description
Vehicle Code	Select the code of the vehicle for which you want to define the floor space capacity.
Floor Space Type	Select the code of the floor space type in which you want to specify the capacity. You have the option to include floor space types that are not initially set up on the Transport Setup page. These additional floor space types won't be visible or considered in the calculations on the relevant transport order. If you later configure these floor space types on the Transport Setup page after assigning the vehicle to the transport order, then they will be both displayed and considered in the calculations, even for existing transport orders.
Capacity	Enter the capacity of the vehicle in relation to the selected floor space type. Modifying this value, even after assigning the vehicle to the transport order, will be considered, leading to adjusting the calculations on the existing relevant transport orders based on the modified value.

Transport Floor Types Packaging

On the **Transport Floor Types Packaging** page, follow these steps to configure the packaging type for the floor space types:

- 1. Open the **Transport Floor Types Packaging** page.
- 2. On the action bar, select **New**.
- 3. Fill in the fields as follows:



Field	Description
Floor Space Type Code	Select the code of the floor space type for which you want to configure the packaging type.
Floor Space Type Description	Specifies the description of the selected floor space type, which automatically populates when selecting a value in the Floor Space Type Code field.
Packaging Type Code	Select the code of the packaging type that you want to assign for the selected floor space type.
Packaging Description	Specifies the description of the selected packaging type, which automatically populates when selecting a value in the Packaging Type Code field.
Qty. per Floor Space	Enter the number of packaging types that can be accommodated within the selected floor space type.
Default	Select the checkbox if you want to use the selected floor space type for calculations in Transport Planning when an item has multiple default packaging.

Calculation for floor space based on Item Default Packaging

When determining floor space calculations, the system checks for Item Default Packaging only if the transport floor space type is not set up for the specific item. The system will perform calculations in Transport Planning for items using the following formula:

Number of Floor Space = (Quantity on the document line / Quantity Per Packaging of the Item Default Packaging) / Quantity per Floor Space of the relevant Transport Floor Space Type Packaging.

The system operates based on one of the following scenarios when determining calculations:

Scenario 1: No Item Default Packaging

When an item doesn't have any Item Default Packaging line, the system will not perform calculations for that specific item.

Scenario 2: Item Default Packaging exists, but no Floor Space Type Packaging

When an item has an Item Default Packaging line assigned with a packaging code that doesn't have any Transport Floor Space Type Packaging configured, the system will not perform calculations for that specific item.



Scenario 3: One Item Default Packaging exists with multiple Floor Space Type Packaging

1. **Multiple Floor Space Types with no default** - When an item has an Item Default Packaging line, but there are multiple Transport Floor Space Type Packaging configured for it without a specified default, the system will not perform calculations for that specific item. This is because the system cannot determine which floor space type to use for the calculations in the absence of a specified default.
2. **Multiple Floor Space Types with one default** - When an item has an Item Default Packaging line, but there are multiple Transport Floor Space Type Packaging configured for it, with one of them specified as default, the system will prioritize the default Transport Floor Space Type Packaging. Subsequently, it will perform calculations for that specific item using the formula mentioned above.

Scenario 4: One Item Default Packaging exists with one Floor Space Type Packaging

When an item has an Item Default Packaging line assigned with a packaging code that has only one Transport Floor Space Type Packaging configured, without a specified default, the system will perform calculations for that specific item using the formula mentioned above. This is possible because the system can determine the floor space type to use for calculations, given that there is only one, even in the absence of a specified default.

Scenario 5: Multiple Item Default Packaging

1. **Multiple Item Default Packaging exists, and Multiple Transport Floor Space Types exist with one default** - When an item has multiple Item Default Packaging lines and there are multiple Transport Floor Space Type Packaging configured for it, with one of them specified as default, the system will prioritize the Item Default Packaging line associated with the default Transport Floor Space Type. Subsequently, it will perform calculations for that specific item using the formula mentioned above.
2. **Multiple Item Default Packaging exists, and one Transport Floor Space Type exists with no default** - When an item has multiple Item Default Packaging lines, and only one of them is configured with Transport Floor Space Type Packaging, without a specified default, the system will prioritize the Item Default Packaging line associated with the Transport Floor Space Type. Subsequently, it will perform calculations for that specific item using the formula mentioned above.

Scenario 6: Item Default Packaging with Source Type (Customer or Vendor)

When an item has multiple Item Default Packaging lines, and one of them is configured with the Source Type as *Customer* or *Vendor*, and the configured customer or vendor is associated with the relevant sales order or purchase



order, the system will prioritize the Item Default Packaging line specified with a Source Type. Subsequently, it will perform calculations for that specific item using the formula mentioned above.

Note

In this scenario, if there are two sales lines with the same item but with different customers, and one of the customers is configured in the Item Default Packaging line, calculations for the respective sales lines will be as follows:

- The sales line associated with the customer that is configured in the Item Default Packaging line will be calculated using the Item Default Packaging line with a specified source type.
- The other sales line associated with the customer that is not configured in the Item Default Packaging line will be calculated using the Item Default Packaging line without a specified source type, based on the above scenarios.

This process works similarly for purchase lines as well.

Scenario 7: Item Default Packaging with Source Type and Shipping Address Code

When an item has multiple Item Default Packaging lines and one of them is configured with the Source Type and Ship-to Address, and the configured customer and the shipping address match relevant values on the sales order, then the system will prioritize the Item Default Packaging line specified with a Source Type and Ship-to Address. Subsequently, it will perform calculations for that specific item using the formula mentioned above.

Note

This scenario takes precedence even when multiple Item default Packaging lines exist with the relevant customer on the sales order, as stated in Scenario 6.



Transport request

Article • 3/25/2026 • 9 min read

The Transport Planning screen shows a list of the Transport Requests. Transport Requests are automatically created after releasing an order, provided that the shipment method linked to that order was set up to require transport. Transport Requests are created per order line but are merged together when they contain the same Location, Shipment Date and Trip No.(if this feature is enabled) (and originate from the same order).

So, the following fields form a key in the process of creating Transport Requests:

- Document Type
- Document No.
- Location
- Shipment Date
- Trip No.

When you change an Order and re-release it, new transport requests are created. When creating a Transport Request, the system checks if a Transport Request with the same key already exists. If not, the status 'New' is assigned to the request. If a Transport Request with the same key already exists, the system has three possible options to execute.

1. If the status of the existing Transport Request is *New*, implying that the planner has not yet planned it or put it *In Progress*, the existing Transport Request is deleted and a new request is made with the new order information.
2. If the status of the existing Transport Request is something other than *New*, the existing Transport Order is updated, and the *Changed* field is set to true. In case the order line with the same key was deleted or does not exist anymore, the *Deleted* field is set to true. This way, the planner is alerted that something changed in the order that might influence the planning that he has already made.
3. If the status is *Planned* and the **Posted Transport Line** is filled, implying that the transport has already been processed, then nothing changes in the Transport Request.

The necessary transport floor space will be calculated after creating the transport request. When creating an outbound transport request, first the system checks if there is a Required Transport Floor Space Type set up for the customer-item combination. If no combination is found, the system checks whether a Transport Floor Space Type has been set up for the item. If neither are set up, you are able to continue, but an error message will be shown on the request line after creating the transport request. When creating an inbound request, the Transport Floor Space Type set up for the item is chosen. And again, when no Floor Space Type setup is found for the item, an error message is shown on the line after creating the request.



Change status of transport request(s)

If a transport request is newly created, it will be given the status 'New'. If there is a change in the source document, the transport request is replaced by a new transport request.

If you don't want to replace the Transport Request because you have already made some changes (e.g., adjusting the planned quantity of the transport floor spaces), it is possible to adjust the status to 'In Progress'. From that moment on, the Transport Request will not be deleted when the order changes, but it will be marked as 'Changed' or 'Deleted'. Also, a log file with changes will be created so you can see what was changed.

It is also possible to set the status to 'Skipped'. This status can be used if no action needs to be taken for this transport request i.e.: no transport order needs to be created for the request.

1. Open the transport request(s) from an order. Select the Transport Request(s) whose status needs to be changed.
2. Select **Change Status**.
3. Select the desired status.

Only the statuses that were not part of the selection are shown. For example, if you have selected transport requests with the status 'New' and 'Skipped', only the status 'In Progress' can be chosen.

4. Select **OK**.

The status of the Transport Request is now changed.

After changing the status from *New* to *In Progress*, the quantities in the planned Transport Floor Space fields are not automatically updated. The user may only change the planned transport floor space fields manually.

Create a transport request

A transport request can be created by releasing the following documents:

- Purchase Order
- Sales Order
- Purchase Return Order
- Sales Return Order
- Transfer Order

The process of creating a transport request is the same for all document types. In the description below, an example is given of creating a transport request from a purchase order.

1. Select the Search icon , enter **Purchase Orders**, and then choose the related link.
2. Open a **Purchase Order** or select **New**.
3. On the **General** FastTab, enter the **Vendor Name**.



4. On the **Lines** FastTab, enter the **No.** and **Quantity**.

5. In the **Trip No.** field, enter the code.

The Trip No. field allows 3 alphanumerical characters and is made available only on the lines by personalization. This field is editable on the order line only if the status is open.

Separate Transport Requests will be created for each trip number. When the trip numbers are updated on the existing sales order lines, the Transport Requests are modified accordingly. This is inherited to the Transport Planning page on the release of the Order.

6. On the **Invoice Details** FastTab, select a **Shipment Method Code** for which the setting Require Inbound/Outbound Transport Order is set to *True*. See [Require Inbound/Outbound transport](#) for more information about the shipment method.

Note

The Transport Requests are not created on the release of **Purchase Credit Memo** or **Sales Credit Memo** irrespective of the Shipment Methods (Inbound/Outbound).

7. On the **Shipping and Billing** FastTab, enter the **Shipping Time**.

The shipping time specifies how long it takes from when the items are shipped from the vendor to when they are delivered in the warehouse. If this field is empty, the planned receipt date is used for the shipping date. Steps 8 and 9 are not valid on the Purchase Order, Purchase Return Order or Transfer Order.

8. Enter the **Transport Route Code**. This field will be calculated based on the existing transport route assignments and automatically filled but can be changed by the user.

9. Enter the **Stop Sequence No.** If the transport route assignment already exists for the selected route and customer, this will be automatically filled.

10. On the action bar, select **Release** > **Release**.

After releasing, the transport requests are created.

11. Select **More Options** > **Related** > **Order** > **Transport Requests**.

The Transport Request(s) linked to the order are shown.

Add instructions to a transport request

It is possible to add an instruction to a Transport Request. This instruction can be opened on the Transport Planning page and the Transport Order Line. It can also be printed on the transport order report.

1. Open the transport request from an order.

2. Select **Instructions**.

3. Enter an Instruction.

An Instruction is now set up for this Transport Request.



View change log entries

All changes in an order that have consequences for the transport request(s) are logged by the system. These log entries are only created when a Transport Request has a status other than *New* and when it concerns changes that could have an impact on the transport planning.

If one of the following key fields in the order is changed, this is not considered a change in a Transport Request but considered as a new Transport Request.

- Document No.
- Document Type
- Location (on order line)
- Shipment Date
- Trip No.

In this case the *Deleted* checkbox on the Transport Request is selected and a new request is created.

If changes in one of the following fields take place in the order, then the field *Changed* in the Transport Request is set to true:

- Quantity or Unit of Measure in the order line
- Item in the order line (when another Floor Space Type is set up for the item)
- Ship-to address in the header. If a change is made when the ship to address is a custom address, every change in the individual ship-to address lines is directly shown as a change. It's not necessary to release the order.
- Shipment Method in the header. When for the new shipment method, no required transport is set up, the transport request is marked as deleted.
- Transport Route Code in the header
- Stop Sequence No. in the header

The log entries page contains details that include information about the field that was changed, the old and new value, the date and the time, the user and the date when the change was accepted.

1. Open the transport request(s) from an order.
2. Select a Transport Request.
3. Select **View Change Log Entries**.

The change log entries for the Transport Request are shown.

Source document info

You can view all the source line information of the selected Transport Request from Source Document Info page.



On the action bar, select **Related > Source Document Info**.

The **Transport Request Source Document Info** page opens.

You can filter and view the information of the transport request by **Document No.**, **Document Type**, **Location Code**, **Trip No.** and **Shipment Date**.

Batch deletion of skipped transport requests

The skipped transport requests are automatically deleted based on the retention period defined in the **Skipped Requests Deletion** field on the **Transport Setup** page. The **Delete Skipped Transport Requests** report removes requests where the status is *Skipped*, no transport order is assigned, and the source document is fully posted and deleted. This report can be scheduled via a **Job Queue** entry.



Transport planning

Article • 8/27/2025 • 21 min read

On the **Transport Planning** page, the planner can view, plan and manage the transport activities. The **Transport Planning** page gives insight into the Transport Requests along with the relevant information.

It is possible to change or adjust the transport requests, for instance adjusting the planned quantity of transport floor spaces. Furthermore, the planner can view the instructions linked to the transport requests and he can also, per request, view and accept changes that were made to its source document. Finally, it's possible to select one or more transport requests and create transport orders for them.

1. Select the Search icon , enter **Transport Planning**, and then choose the related link.

The **Transport Planning** list page opens.

2. Enter the required information in the following fields:

Field	Description
Status	Specifies the status inherited from the Transport Requests page.
Responsible User	Specifies the user who is planning or has planned the request from the Transport Requests page.
Transport Order No.	Specifies the transport order linked to the request from the Transport Requests page. If the request is planned, it is linked to a transport order.
Request Type	Specifies whether the request from the Transport Requests page is inbound or outbound.
Source Document No.	Specifies the order number of the source document from which the request originates.
Location Code	Specifies the warehouse where the truck is loaded or unloaded.
Shipment Date	Specifies the required shipment date.
Shipment Time	Specifies the required shipment time for the items in the request.
Trip No.	Specifies the code used to split a single source document into multiple requests from the Transport Requests page.
Route Code	Specifies the transport route for delivering the items linked to the transport order.



Transport Requests for Source Document	Specifies the number of requests created from the same source document.
Ship-to Name	Specifies the name of the customer, vendor, or location associated with the documents.
Ship-to City	Specifies the city in the shipping address.
Calculated EUR	Specifies the calculated quantity of floor space type 1 from the Transport Requests page.
To Plan/Planned EUR	Specifies the quantity to plan or already planned for floor space type 1.
Calculated BLK	Specifies the calculated quantity of floor space type 2 from the Transport Requests page.
To Plan/Planned BLK	Specifies the quantity to plan or already planned for floor space type 2.
Calculated BUFFER	Specifies the calculated quantity of floor space type 3 from the Transport Requests page.
To Plan/Planned BUFFER	Specifies the quantity to plan or already planned for floor space type 3.
Calculated Gross Weight	Specifies the value derived by multiplying the Gross Weight field value on the Item Card page by the Quantity field value from the source document.
Net Weight	Specifies the value derived by multiplying the Net Weight field value on the Item Card page by the Quantity field value from the source document.
Tare Weight	Specifies the calculated difference between the Calculated Gross Weight and the Net Weight field values.
Calculated Volume	Specifies the calculated volume of the items from the Transport Requests page.
Temperature	Specifies the required transport temperature for the items.
Ship-to Post Code	Specifies the postal code of the shipping address.
Delivery Date	Specifies the delivery date of the items.
Delivery Time	Specifies the delivery time of the items.



Delivery Starting Time	Specifies the earliest time when the customer is ready to start receiving the items.
Delivery Ending Time	Specifies the latest time by which the customer must finish receiving the items.
Pickup Date	Specifies the date when the items are scheduled to be picked up.
Pickup Starting Time	Specifies the earliest time when the pickup of the items can begin.
Pickup Ending Time	Specifies the latest time by which the pickup of the items must be completed.
Stop Sequence No.	Specifies the stop sequence, defining the truck's loading or unloading order.
Source Document Lines	Specifies the number of order lines combined in the request.
Shipment Method Code	Specifies the code assigned for the method of shipment.
Shipping Agent (Source)	Specifies the shipping agent, pulled from the source document.
Error	Specifies if an error occurred during floor space calculations due to an incomplete setup. If an error occurred, select Yes to view the message.
Instruction Available	Specifies whether instruction notes are linked to the request from the Transport Requests page.
Pickup Time	Specifies the time when the goods were picked up for delivery, which is used as a reference in the proof of delivery process. This field is visible only when the Aptean POD Integration Connector is installed and can be added through personalization.

! Note

- When selecting multiple lines on the **Transport Planning** page with the same **Shipping Agent (Source)** field value, the **Shipping Agent** field value is automatically updated on the **Create Transport Order** page.
- When selecting multiple lines on the **Transport Planning** page with different **Shipping Agent (Source)** field values, the **Shipping Agent** field value must be selected manually on the **Create Transport Order** page.
- When selecting multiple lines on the **Transport Planning** page with the same **Location Code** field value across all stops, the **Location Code** field value is automatically updated on the **Create Transport Order** page.
- When selecting lines with different **Location Code** field values across stops, the **Location Code** field value is left empty and must be entered manually on the **Create Transport Order** page.

3. Select the required **Transport Planning** from the list.

All Transport Requests are shown on the Transport Planning page.



The following functions that can be executed on the Transport Planning page are also available on the Transport Requests page via the order and are already explained in the [Transport Requests](#).

- Change status
- Add instructions
- View Change Log Entries

Any changes to field values on the transport planning line are automatically saved on the related **Transport Order** page, which opens when you select the **Transport Order No.** field without requiring you to leave the selected record on the **Transport Planning** page.

- Stop Sequence No.
- Temperature
- Shipment Time
- Delivery Date
- Delivery Time
- To Plan/Planned EUR
- To Plan/Planned BLK
- To Plan/Planned NA
- To Plan/Planned APAC
- Pick-up No.
- Pick-up Name
- Pick-up Country/Region Code
- Pick-up Address
- Pick-up City
- Ship-to Address
- Ship-to Name
- Ship-to City
- Ship-to Country/Region Code

FactBoxes

Ship-to Address FactBox

The **Ship-to Address** FactBox provides detailed insights into the shipping address of the transport request. The displayed information varies based on the type of order:



Type of the document	Description
Sales Orders	Details of the shipping address of the relevant sales order are displayed.
Sales Return Orders	Details of the warehouse location of the inventory are displayed.
Purchase Orders	Details of the warehouse location selected as the ship-to location are displayed.
Purchase Return Orders	Details of the address of the relevant vendor are displayed.
Transfer Orders	Details of the warehouse location selected as transfer-to location are displayed.

Note

If the warehouse location is not specified on the document, the system will consider the location specified in the **Location Code** field on the **Company Information** page.

The **Ship-to Address** FactBox displays the following information:

Field	Description
Ship-to No.	Specifies the code that identifies the shipping address. This field is visible only when personalized.
Ship-to Name	Specifies the name of the relevant customer, vendor or location associated with the documents.
Ship-to Address	Specifies the primary shipping address.
Ship-to Address 2	Specifies the address 2 of the shipping address. This field is visible only when personalized.
Ship-to Post Code	Specifies the postal code of the shipping address.
Ship-to City	Specifies the city name of the shipping address.
Ship-to State	Specifies the state name of the shipping address. This field is visible only when personalized.
Ship-to Country	Specifies the country name of the shipping address.

Pick-up Address FactBox

The **Pick-up Address** FactBox provides detailed insights into the picking-up address of the transport request. The displayed information varies based on the type of order:



- **Sales Orders** and **Sales Return Orders** - Details of the warehouse location of the inventory are displayed.
- **Purchase Orders** and **Purchase Return Orders** – Details of the address of the relevant vendor are displayed.
- **Transfer Orders** - Details of the warehouse location selected as transfer-from location.

Note

If the warehouse location is not specified on the document, the system will consider the location specified in the **Location Code** field on the **Company Information** page.

The **Pick-up Address** FactBox displays the following information:

Field	Description
Pick-up Name	Specifies the name of the relevant vendor or location associated with the documents.
Pick-up Address	Specifies the primary address of the picking up address.
Pick-up Address 2	Specifies the address 2 of the picking up address. This field is visible only when personalized.
Pick-up Post Code	Specifies the postal code of the picking-up address.
Pick-up City	Specifies the city name of the picking-up address.
Pick-up State	Specifies the state name of the picking-up address. This field is visible only when personalized.
Pick-up Country	Specifies the country name of the picking-up address.

Address handling scenarios for sales and purchase return orders

The system determines the appropriate addresses to print for sales and purchase return orders based on predefined rules.

Sales return orders

Sales return orders are updated with the pick-up and ship-to addresses based on the following hierarchy:

Pick-up Address Scenarios

- If the **Ship-to Code** field value on the associated **Sales Order** page contains a value, the corresponding address is printed.



- If the **Ship-to Code** field value is blank, then the customer address from the associated **Customer Card** page is printed.
- If both the **Ship-to Code** field value and customer address are blank, no address is printed.

Ship-to Address Scenarios

- If the **Location Code** field value on the sales order line is available, the related address is printed.
- If the **Location Code** field value is blank, then the company address from the selected company is printed.
- If both the **Location Code** field value and company address are blank, no address is printed.

Purchase return orders

Purchase return orders are updated with the pick-up and ship-to addresses as follows:

- The pick-up address is updated from the warehouse location of the associated location card.
- The ship-to address is updated from the vendor address of the associated vendor card.

These rules also apply when executing the **Get Posted Lines to Reverse** and **Copy Document** actions on the **Purchase Return Order** page.

Estimated totals for selected lines

On the **Transport Planning** page, it is possible to see what the total estimated transport floor space is (per Floor Space Type) for the selected transport requests.

1. Select the context menu of the required record.
2. Choose **Select More**.
3. Select any number of Transport Request(s).

The total estimated weight, volume, and floor space are shown for all selected Transport requests. This information will help the planner to estimate and organize which Transport Requests should be assigned to a specific Transport Order.

The values that are set as floor space types on the **Transport Setup** page are presented here as fields.

Edit transport line

It is possible to change data of a Transport Request, (possibly) overwriting data from the source document. Also, when helpful in preparing the Transport order, new data can be added to the request.



1. On the action bar, select the **Edit List**.

Only Transport Request with the status 'In progress' or 'Planned' can be edited. For more information on changing statuses, see [Change status of Transport Request\(s\)](#).

2. Enter the required information in the following fields:

Field	Description
Trip No.	Specifies the code used to assign specific document lines to separate transport requests. Upon release of the document, a separate transport request will be created for each unique combination of Location Code , Shipment Date , and Trip No. field values. This applies only if transport is required for the document, as determined by the Shipment Method Code field value.
New Trip No.	Specifies the value to be used as the Trip No. field value for the transport request to which the selected lines will be moved. The source document lines will be updated with this new Trip No. field value.
Item No.	Specifies the number of an item.
Description	Specifies a description of the item to be sold.
Outstanding Quantity	Specifies the outstanding quantity of the item.
Unit of Measure Code	Specifies how each unit of the item or resource is measured, such as in pieces or hours. By default, the value in the Base Unit of Measure field on the item or resource card is used.
Transport Floor Space	Specifies the transport floor space type used for the item on the document line.
Calculated Transport Floor Space	Specifies the calculated floor space type for the item on the document line.
Planned Transport Floor Space	Specifies the planned calculated floor space type for the item on the document line.
Calculated Gross Weight	Specifies the value derived by multiplying the Gross Weight field value on the Item Card page by the Quantity field value from the source document.
Net Weight	Specifies the value derived by multiplying the Net Weight field value on the Item Card page by the Quantity field value from the source document.
Tare Weight	Specifies the calculated difference between the Calculated Gross Weight and the Net Weight field values.
Calculated Volume	Specifies the calculated volume of the item on the document line.



Split transport request function

The Split Transport Request function is used to remove a specific line from the Transport Request that was created from multiple lines. This page contains the information such as Trip No., Calculated and Planned Transport Floor Space, Calculated Weight, and Calculated Volume.

1. On the **Transport Planning** list page, select the required record.
2. On the action bar, select **Split Transport Request**.
The **Split Transport Request** page opens only if:
 - i) One Transport Request is selected.
 - ii) The **Status** of the selected Transport Request is *In Progress* or *New*.

You can also view the **Estimated Totals** section with **Original Calculated**, **Original to Plan**, **New Calculated** and **New to Plan** values.

Field	Description
Original Calculated	Shows the total Weight, Volume, and Floor Space Type of the Transport Request lines for which the New Trip No. is not assigned.
Original to Plan	Shows the required Floor Space Type of the Transport Request enabling the Transport Planner to plan for the transport. This provides the actual number of transport units required to transport the items based on the Floor Space Type values in the Original Calculated section.
New Calculated	Shows the new Weight, Volume, and Floor Space Type of the Transport Request lines to which a New Trip No. is assigned.
New to Plan	Shows the required Floor Space Type value of the Transport Request line after a New Trip No. is assigned to it. This provides the actual number of transport units required to transport the items based on the Floor Space Type values in the New Calculated section.

Create new trip function

You can modify the Trip No. of the order line from which the Transport Request is generated similarly as in order page. When you enter an existing Trip No. to an order line with all the other keys as same, then the line will merge into the existing Transport Request, otherwise it will create a new Transport Request.

When you create a Transport Request with multiple lines, you can remove any required line from the Transport Request by changing the Trip No. value. 1. On the **Split Transport Request** page, select the context menu of the required record. 2. In the **New Trip No.** field, enter the desired code.

If the existing Trip No. is used, it will combine with the same record if all the other field values match.

If a new Trip No. is used, a new line will be created.



The Floor Space Type, Weight, and Volume values in the **Estimated Totals** section are updated according to the values assigned in the **New Trip No.** field. 3. On the action bar, select **Create New Trip**. 4. Click **Ok** to the confirmation message. The Transport Request is created as per the new trip no.

Accept function

When the planner has reviewed transport requests that were marked as 'Changed' or 'Deleted', he/she can accept the changes with the 'Accept' function. This function accepts the selected lines that are marked as Changed and deletes the lines that are marked as Deleted. The field 'Date and Time Accepted' in the Transport Request Change Log entries will be registered.

1. Select the context menu of the required record.
2. Choose **Select More**.
3. Select any number of Transport Request(s) for which the checkbox 'Deleted' or 'Changed' is enabled.
4. On the action bar, select **Accept**. The checkbox 'Changed' is disabled. Transport requests with the checkbox 'Deleted' enabled are deleted by the Accept function.
5. Select **View Change Log Entries**.

By default, a filter is set with an empty 'Date and time accepted' field. Clear the filter to see the date and time accepted.

The 'Date and Time Accepted' field is now registered.

Create transport order

After the planner has adjusted the transport order line as desired, it is possible to turn it into a transport order. The planner can combine multiple transport order lines into a transport order, based on for example the date/location/number of pallets.

It is possible to filter and add all transport planning lines with the same Transport Route Code into one transport order.

You can also create a transport order, filtering the lines with Transport Route Code, Location Code, and Shipment Date. With the **Consolidate per Route** toggle turned on, for each route, a user can create one consolidated transport order. When this toggle is turned off, separate transport order documents are created for each source document.

Warehouse shipment(s) can also be created at the same time, from this page, when **Create Warehouse Shipment** toggle is turned on.

1. Select the context menu of the required record.



2. Choose **Select More**.
3. Select any number of Transport Request(s).
4. On the action bar, select **Create Transport Order**.
5. Select **Use Report Filters** on **Source Lines** field to disregard the selected lines and consider only the filters.
6. Select the **Shipping Agent**.

 Note

You can select any Shipping Agent regardless of its association with a vendor. It is possible to create a Transport Order with the Shipping Agent that is not configured with the vendor.

7. Select the **Transport Route Code**.
8. Select the **Transport Date**. Double select any date in the calendar to select the Transport Date.

 Note

When the system identifies the applicable transport route based on the selected shipping agent and transport date, it automatically inherits certain transport route details, such as driver information, truck and trailer details, and loading sequence number, to the transport order that will be created. For this to occur, the selected transport date must fall within the specified starting and ending dates of the relevant transport route structure, which is also associated with the selected shipping agent code.

9. Turn on the **Consolidate per Route** toggle to create one transport order per route.
10. Turn on the **Add to existing transport orders** toggle to assign the transport request to the existing transport order. The system assigns the transport request only when the selected **Transport Date** and **Route Code** match the values specified on the existing transport order. This functionality works only if the **Fixed** toggle is turned off on the existing transport order to which the transport request is intended to be added.

 Note

This toggle is editable only when the **Consolidate per Route** toggle is turned on.

To manually assign the transport request to an existing transport order, see [Add to Transport Order](#).

11. Turn on the **Create Warehouse Shipment(s)** toggle to create warehouse shipment(s) at the same time.
12. Turn on the **Include Sales Return Orders** and **Include Purchase Return Orders** toggles to add the transport requests from sales and purchase return orders to the newly created transport order. If these toggles are turned off, even if the transport requests from sales and purchase return orders are selected while executing the **Create Transport Order** action, they will not be included in the newly created transport order.
13. Under **General Filters**, enter the following:



- Location Code
- Shipment Date
- Route Code

14. If **Create Warehouse Shipment(s)** toggle is turned on, under **Warehouse Shipment Options** enter the following extra information:

- Consolidate per Route
- Location Code
- Sorting Method
- Assign Shipment Date

15. Select **OK**.

A transport order is now created containing the selected transport requests.

Add to Transport Order

You can manually assign transport requests to an existing transport order only if the **Fixed** toggle is turned off on the existing transport order to which the transport request is intended to be added.

To manually assign transport requests, follow these steps:

1. On the **Transport Planning** page, select the transport request that you want to assign.

Note

Transport requests with the status as *New*, *In Progress*, or *Changed* should be selected.

2. On the action bar, select **Add to Transport Order**.

The **Add to Transport Order** page opens.

3. In the **Transport Order No.** field, select the dropdown to view the list of transport orders.

Only transport orders that have the **Fixed** toggle turned off will be filtered and displayed in the list.

4. Select the relevant transport order.

Note

If the transport request has a different route code than the selected transport order, the **Route Code** field in the transport order becomes blank after this process, turning on the **Multiple Routes** toggle.



5. Select **OK**.

Create warehouse shipment

The Create Warehouse Shipment report allows you to create warehouse shipment documents based on the transport routes i.e., the location code, route code, and shipment date.

With the **Consolidate per Route** toggle turned on, for each route, you can create one consolidated warehouse shipment document. When this toggle is turned off, separate warehouse shipment documents are created for each source document.



Transport management

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You can manage the transport orders from this page.

- 1. Open the **Transport Management** page.
- 2. On the **Filters** section, in the **Date Filter** field, select a specific date or date range for filtering transport orders.
- 3. In the **Route Code Filter** field, select the relevant route code.

The transport orders are filtered based on the filters applied and displayed on the transport management lines along with the basic information.

- 4. Enter the required information in the following fields:

Field	Description
Transport Order No.	Specifies the order number of the transport order.
Shipping Agent	Specifies the shipping agent, as defined in the source document.
Route Code	Specifies the transport route on which the items in the transport order are to be delivered.
Route Code Description	Specifies the description of the route code.
Transport Date	Specifies the transport date of the transport order.
Loading Dock Door Code	Specifies the code that identifies the loading dock door for the assigned dock. The loading dock doors provide access to the dock area and are essential for the efficient flow of items in and out of the facility.
Location Code	Specifies the location code for this document. If it is blank, the transport request lines associated to the order have a different location codes.
Weight Capacity	Specifies the combined weight capacity of the selected vehicles for the transport order, representing the maximum total weight that can be accommodated in the entire shipment.
Calculated Gross Weight	Specifies the value derived by multiplying the Gross Weight field value on the Item Card page by the Quantity field value from the source document.
Net Weight	Specifies the value derived by multiplying the Net Weight field value on the Item Card page by the Quantity field value from the source document.
Tare Weight	Specifies the calculated difference between the Calculated Gross Weight and the Net Weight field values.



EUR Capacity	Specifies the floor space capacity of the vehicle, corresponding to the Floor Space Type 1 field value set on the Transport Setup page.
BUFFER Capacity	Specifies the floor space capacity of the vehicle, corresponding to the Floor Space Type 3 field value set on the Transport Setup page.
Planned EUR	Specifies the sum of the planned transport floor space of type 1 from the linked transport requests.
Planned BLK	Specifies the sum of the planned transport floor space of type 2 from the linked transport requests.
Planned BUFFER	Specifies the sum of the planned transport floor space of type 3 from the linked transport requests.
Volume Capacity	Specifies the total volume capacity of the selected vehicles for the transport order, representing the total available space for accommodating items in the shipment.
Calculated Volume	Specifies the calculated volume.
Fixed	Specifies whether the addition of new transport requests is restricted for the transport order.

5. On the action bar, choose the required action from the following list:

Action	Description
New	Create a new transport order by providing information such as shipping agent, transport date, and route code. The newly created transport order will not contain any transport requests. It contains only the information provided while creating it. Additionally, details from the selected transport route code, such as driver number, truck, trailer, and shipping agent codes, will be automatically populated onto the transport order.
Replan	Replan the transport order by changing the route code and transport date of the transport order. For more information, see Replan the existing transport order .
Posting	Post - Post the selected transport order. You can post only one transport order at a time. Post Shipments – Post the shipment(s) or warehouse shipment(s) for the source document lines, such as sales, transfer, and purchase return order lines, that are associated with the selected transport order. If the location is a warehouse location, the system posts a warehouse shipment. For simple locations, it posts a shipment for the source document line. Post Receipts – Post the receipt(s) or warehouse receipt(s) for the source document lines, such as purchase, and sales return order lines, that are associated with the selected transport order. If the location is a warehouse location, the system posts a warehouse receipt. For simple locations, it posts a receipt for the source document line.



	Post Invoices – Post the invoices of the source documents that are associated with the selected transport order.
Print	Generate reports for documents such as transport orders, pick instructions, sales order confirmation, sales return orders, purchase orders, purchase return orders, and transfer orders that are associated with the selected transport order.
Functions	Create Warehouse Shipment – Create warehouse shipments for outbound source document lines that are associated with the transport order. This function is executed based on the configuration of the Combine Whse. Documents toggle on the Transport Setup page. For more information, see Create Warehouse Shipment/Receipt. Create Warehouse Receipt – Create warehouse receipts for inbound source document lines that are associated with the transport order. This function is executed based on the configuration of the Combine Whse. Documents toggle on the Transport Setup page. For more information, see Create Warehouse Shipment/Receipt. Payment Journal – This function allows you to record cash, cards, and other forms of payment for the customer. It specifically applies to sales and sales return orders that are associated with the selected transport order. It generates one journal line for each document type. Upon initial use, it creates a batch for the user ID, using the template configured on the Transport Setup page, and maintains it for subsequent use. This action is available only when any one of the journal templates is configured on the Transport Setup page. Cash Receipt Journal – Create cash receipt lines for the sales and sales return orders that are associated with the selected transport order. This action is available only when the Cash Receipt Jnl. Template is defined on the Transport Setup page. Card Receipt Journal – Creates journal lines for card payments related to sales and sales return orders that are associated with the selected transport order. This action is available only when the Card Receipt Jnl. Template field has a value configured on the Transport Setup page. Other Receipt Journal - Create journal lines for other forms of payments related to sales and sales return orders that are associated with the selected transport order. This action is available only when the Other Receipt Jnl. Template field has a value configured on the Transport Setup page. Mark as Fully Loaded - Mark a transport order as fully loaded, indicating that all goods for the order are loaded and ready for transport. This action is visible only when the Aptean POD Integration Connector is installed.
Related	Warehouse Shipment Lines – View the existing shipment lines of transport requests associated with the selected transport order. Warehouse Receipt Lines - View the existing receipt lines of transport requests associated with the selected transport order.

6. On the **Transport Requests** FastTab, you can view the transport order lines or transport requests associated with the selected transport order. This information includes fields and details from the relevant transport order line.

7. Enter the required information in the following fields:



Field	Description
Stop Sequence No.	Specifies the stop sequence of the transport request derived from the Transport Request page. The stop sequence defines the order in which the truck is loaded or unloaded on the specified transport route.
Changed	Specifies whether the source document line, from which the transport request derived from the Transport Request page originates, has been changed. This includes updates to the route code or stop sequence number. This field is applicable when the transport request status is <i>In Progress</i> or <i>Planned</i> .
Deleted	Specifies whether the source document line, from which the transport request derived from the Transport Request page originates, has been deleted. This field is applicable when the transport request status is <i>In Progress</i> or <i>Planned</i> .
Source Document Type	Specifies the type of the source document from which the transport request derived from the Transport Request page originates. For other stop types, this field is set to <i>Other</i> .
Source Document No.	Specifies the number of the source document from which the transport request derived from the Transport Request page originates, or the code used for other stop types.
Route Code	Specifies the transport route on which the items in the transport order are planned to be delivered.
Shipment Date	Specifies the required shipment date for the transport request derived from the Transport Request page.
Shipment Time	Specifies the required shipment time for the transport request derived from the Transport Request page.
Delivery Date	Specifies the required delivery date for the items in the transport request derived from the Transport Request page.
Delivery Time	Specifies the required delivery time for the items in the transport request derived from the Transport Request page.
Location Code	Specifies the warehouse location where the truck is to be loaded or unloaded.
Pickup Time	Specifies the time when the goods were picked up for delivery, which is used as a reference in the proof of delivery process. This field is visible only when the Aptean POD Integration Connector is installed and can be added through personalization.



Calculated Gross Weight	Specifies the value derived by multiplying the Gross Weight field value on the Item Card page by the Quantity field value from the source document.
Net Weight	Specifies the value derived by multiplying the Net Weight field value on the Item Card page by the Quantity field value from the source document.
Tare Weight	Specifies the calculated difference between the Calculated Gross Weight and the Net Weight field values.
Calculated Volume	Specifies the calculated volume of the items in the transport request derived from the Transport Request page.
To Plan/Planned EUR	Specifies the quantity of floor space type 1 that is to be planned or has already been planned for the transport request derived from the Transport Request page.
To Plan/Planned BLK	Specifies the quantity of floor space type 2 that is to be planned or has already been planned for the transport request derived from the Transport Request page.
To Plan/Planned BUFFER	Specifies the quantity of floor space type 3 that is to be planned or has already been planned for the transport request derived from the Transport Request page.

8. On the action bar, select **Line** and choose the required action from the following list:

Action	Description
Accept	Confirm the changes made in the transport request that were marked as <i>Changed</i> or <i>Deleted</i> through the Transport Planning page. For more information, see Accept function.
Remove from Transport Order	Remove the transport request from the selected transport order. For more information, see Add data or delete transport order lines . For Other source document type, the system not only removes the request from the transport order but also deletes it entirely.
Add a New Stop	Add a new stop for this route associated with this transport order. For more information, see Add a New Stop .
Change Transport Stop	Move a transport request from one transport order to another. For more information, see Change Transport Stop .
Instructions	Provide instructions specific to the selected transport order line.
Source Document Info	Navigate to the Transport Request Source Document Info page to view details of the source order line. On the action bar, select Show Document to open the relevant source order document. For stops, this action directly opens the relevant Other Stop Type Card page.



Related	View Change Log Entries - Navigate to the Transport Request Change Log Entries page to view relevant entries related to changes made to the selected transport order line, if any. For more information, see Accept function. Warehouse Shipment Lines – View the existing shipment lines for the selected transport order line. Warehouse Receipt Lines - View the existing receipt lines for the selected transport order line.
Functions	Create Warehouse Shipment – Create a warehouse shipment for the selected outbound source document line. This function is executed based on the configuration of the Combine Whse. Documents toggle on the Transport Setup page. For more information, see Create Warehouse Shipment/Receipt. Create Warehouse Receipt – Create a warehouse receipt for the selected inbound source document line. This function is executed based on the configuration of the Combine Whse. Documents toggle on the Transport Setup page. For more information, see Create Warehouse Shipment/Receipt. Create Claim - Create claims for sales and purchase documents. The system will create a claim if it has not already been generated or if the shipment/receipt has been posted. For more information about claims, see Apteian Claims.

9. On the action bar, select **Posting** and choose the required action from the following list:

Action	Description
Post Shipments	Post the shipment or warehouse shipment for the selected outbound source document line, such as sales, transfer, and purchase return order lines. If the location is a warehouse location, the system posts a warehouse shipment. For simple locations, it posts a shipment for the source document line.
Post Receipts	Post the receipt or warehouse receipt for the selected inbound source document lines, such as purchase, and sales return order lines. If the location is a warehouse location, the system posts a warehouse receipt. For simple locations, it posts a receipt for the source document line.
Post Invoices	Post the invoice of the selected source document line.

10. On the action bar, select **Payment Journal** and choose the required action from the following list. This function allows you to record cash, cards, and other forms of payment for the customer. It specifically applies to sales and sales return order lines. Upon initial use, it creates a batch for the user ID, using the template configured on the **Transport Setup** page, and maintains it for subsequent use. This action is available only when any one of the receipt journal templates is configured on the **Transport Setup** page.

Action	Description
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Cash Receipt Journal	Create a cash receipt line for the selected sales or sales return order line. This action is available only when the Cash Receipt Jnl. Template field has a value configured on the Transport Setup page.
Card Receipt Journal	Create a receipt line for card payments related to the selected sales or sales return order line. This action is available only when the Card Receipt Jnl. Template field has a value configured on the Transport Setup page.
Other Receipt Journal	Create a receipt line for other forms of payments related to the selected sales or sales return order line. This action is available only when the Other Receipt Jnl. Template field has a value configured on the Transport Setup page.

Create Warehouse Shipment/Receipt

You can create warehouse shipments or receipts for transport orders and specific transport requests. The creation of these warehouse documents is based on the configuration of the **Combine Whse. Documents** toggle on the [Transport Setup](#) page.

When the **Combine Whse. Documents** toggle is turned on, the following actions will function as follows:

- **Create Warehouse Shipment** (for the transport order) – Generates a consolidated warehouse shipment for all outbound requests associated with the selected transport order. If any of the outbound requests already have an existing warehouse shipment, the system then creates a new consolidated warehouse shipment only for the outbound requests that do not have a warehouse shipment.
- **Create Warehouse Receipt** (for the transport order) – Generates a consolidated warehouse receipt for all inbound requests associated with the selected transport order. If any of the inbound requests already have an existing warehouse receipt, the system then creates a new consolidated warehouse receipt only for the inbound requests that do not have a warehouse receipt.

If you prefer to have a single consolidated warehouse shipment or receipt for the entire transport order, and some of the associated transport requests already have individual warehouse shipments or receipts, you can delete those individual warehouse documents and create a consolidated one using the actions mentioned above.

If you want to add a specific transport request line to the existing combined warehouse document, you can use the following actions on the **Transport Requests** FastTab:

- **Create Warehouse Shipment** (for the transport order line) - Generates a warehouse shipment for the selected outbound request. If a warehouse shipment already exists for the associated transport order, the warehouse shipment line for the selected outbound request line will be added to the existing warehouse shipment.
- **Create Warehouse Receipt** (for the transport order line) - Generates a warehouse receipt for the selected inbound request. If a warehouse receipt already exists for the associated transport order, the warehouse receipt line for the selected inbound request line will be added to the existing warehouse receipt.



When the **Combine Whse. Documents** toggle is turned off, all the actions mentioned above will result in the creation of separate warehouse documents for each inbound and outbound request.

Note

The transport route code in the newly created warehouse documents will be inherited from the relevant source order documents.

Replan the existing transport order

On the **Transport Management** page, you can replan a transport order by changing its route code and transport date.

1. On the action bar, select **Replan**.
The **Replan Transport Order** page opens.
2. On the **Current** FastTab, you can view the current details of the transport order, including its number, route code, and transport date.
3. On the **New** FastTab, select the desired route code and transport date in the respective fields.
4. Select **OK**.

The transport order and its associated transport requests are now updated and replanned with the newly selected route code and transport date. This also updates the information on the relevant source document lines. This process includes updating the following on the source documents, to align with the new transport date.

- The **Planned Shipment Date** field is adjusted on the associated outbound document lines such as sales, transfer, and purchase return order lines.
- The **Planned Receipt Date** is adjusted on the associated inbound document lines such as purchase, and sales return order lines.
- The corresponding fields of planned dates are adjusted on warehouse shipment/receipt lines, such as **Starting Date** or **Due Date**.

Add a New Stop

When managing transport orders, you can add new stops to the associated route. A new stop can be any additional destination you wish to include along the transportation route. These stops can be used for various purposes, such as making additional pickups or deliveries, stopping for the company itself, or for any other specific reasons. To add a new stop, follow these steps:

1. On the **Transport Requests** FastTab, on the action bar, select **Add a New Stop**.
The **Add New Stop** page opens.



2. In the **Source Document No.** field, select the required other stop type. For configuring the other stop type, see [Other Stop Types](#).
3. In the **Stop Sequence No.** field, enter the sequence number of the stop.
4. Select **OK**.

A new transport order line is added with the Source Document Type set to *Other* for the newly added stop. This line will not initially have a route code and location code assigned to it. However, you can assign a route code to it along with other information, except for the location code. This line is inserted into the transport order according to the stop sequence number provided.

Note

The line corresponding to the other stop type cannot be viewed in the transport planning lines on the **Transport Planning** page.

Change Transport Stop

You can move a transport request from one transport order to another. To do so, follow these steps:

1. Open the **Transport Management** page.
2. Select the relevant transport order.
3. On the **Transport Requests** FastTab, select the relevant transport order line.
4. On the action bar, select **Change Transport Stop**.
The **Change Transport Stop** page opens.
5. On the **Current** FastTab, you can view the details of the current transport order, such as transport order number, route code, and shipment date.
6. On the **New** FastTab, in the **Route Code** and **Shipment Date** fields, select the relevant route code and shipment date of the new transport order.

Note

If you change the **Route Code** and **Shipment Date** fields after selecting a transport order, the **Transport Order No.** field will be cleared.

7. In the **Transport Order No.** field, select the more options icon.
The list of transport orders is filtered based on the selected route code and shipment date. You can remove the filters to view the entire list.
Once you select the transport order, the **Route Code** and **Shipment Date** fields are automatically populated based on the details of the selected transport order.



8. Select **OK**.

Following the completion of the process:

- The selected transport request is removed from the current transport order and added to the newly selected one.
- The system automatically updates the planned shipment date in outbound source documents and the planned receipt date in inbound source documents based on the shipment date of the new transport order.
- If the transport request does not have a warehouse document, the process concludes at this point.

If a warehouse document exists for the transport request, the system then proceeds based on the configuration in the **Combine Whse. Documents** toggle on the **Transport Setup** page.

When the **Combine Whse. Documents** toggle is turned off, the system proceeds based on the following scenarios:

- If a warehouse document exists for the transport request, the system updates the transport order number, transport route code, and due date in the warehouse document based on the new transport order.
- If a combined warehouse document exists for the current transport order, the system removes only the warehouse document line for the involved transport request from the combined warehouse document.

When the **Combine Whs. Documents** toggle is turned on, the system proceeds based on the following scenarios:

- If a warehouse document exists for the transport request, and the new transport has a combined warehouse document, the system will delete the existing warehouse document for the transport request. Subsequently, the warehouse document line for the involved transport request will be added to the existing combined warehouse document of the new transport order.
- If a combined warehouse document exists for the current transport order, the system removes only the warehouse document line for the involved transport request from the combined warehouse document. If the new transport order does not have a combined warehouse document, the process concludes at this point. However, if the new transport order has a combined warehouse document, the warehouse document line for the involved transport request will be added to the existing combined warehouse document of the new transport order.

FactBox

Transport Overview FactBox

You can view the **Transport Overview** FactBox which provides insights into the header details of the selected transport order, which includes the following information:

- **Route Code**
- **Driver No.**



Transport

- Truck Code
- Trailer Code
- Shipping Agent
- Loading Dock Door Code
- Dock Status
- Dock Date
- Dock Time
- Calculated Weight
- Weight Capacity
- Calculated Volume
- Volume Capacity
- Planned EUR
- Planned BLK
- EUR Capacity
- BLK Capacity

For more information about these fields, see [Transport order](#).



Transport order

Article • 8/27/2025 • 7 min read

A transport order specifies all information that is necessary for the shipping agent. It primarily specifies the exact address, delivery date, and load type.

Add information in transport order header

A couple of information fields can be entered manually in the transport order header, such as transport costs, the actual temperature of the truck, and its license plate.

- 1. Select the Search icon , enter **Transport Orders**, and then choose the related link.
The **Transport Orders** list page opens.
- 2. Select the preferred **No.**
The **Transport Order** card page opens.
- 3. On the **General** FastTab, enter the relevant information in the following fields:

Field	Description
No.	Specifies the order number of the transport order.
Shipping Agent	Specifies the shipping agent of the transport order.
Route Code	Specifies the transport route on which the goods in the transport order are planned to be delivered.
Transport Date	Specifies the transport date of the transport order.
Transport Cost Amount	Specifies the total cost amount of the transport order. This field specifies the total cost amount of the transport order. The Transport Costs are used when creating a purchase invoice for the shipping agent.
Currency Code	Specifies the currency code of the transport order. If the currency code does not deviate from the standard currency code, this field can remain empty.
Required Temperature	Specifies the lowest temperature of the linked Transport Requests.
Temperature	Specifies the actual temperature. This temperature specifies the actual temperature of the transport. The actual temperature can be checked against the required temperature that is also shown in the header. The required temperature is based on the lowest temperature that is entered within the transport lines.



Changed Line exists	Specifies if linked transport requests are changed after the transport order is created.
Deleted Line exists	Specifies if linked transport requests are deleted after the transport order is created.
Multiple Routes	Specifies whether there is more than one transport route specified for the transport requests in the transport order.
Shipment Method Code	Specifies the code assigned for the method of shipment.
Fixed	Specifies whether the addition of new transport requests is restricted for the transport order.
Planned Floor Space 1	Specifies the sum of the planned transport floor space type 1 from the linked transport requests.
Planned Floor Space 2	Specifies the sum of the planned transport floor space type 2 from the linked transport requests.
Planned Floor Space 3	Specifies the sum of the planned transport floor space type 3 from the linked transport requests.
Planned Floor Space 4	Specifies the sum of the planned transport floor space type 4 from the linked transport requests.
Planned Floor Space 5	Specifies the sum of the planned transport floor space type 5 from the linked transport requests.
Transport Cost Calculation	Specifies the method that transport costs are defined for the transport order. <i>Manual</i> : the user defines the total cost amount and the trade plans. <i>Trade Plan</i>: specifies the costs and the trade plans are calculated by the system automatically. <i>None</i>: specifies that there will be no cost calculation done for the defined transport order.
Cost Amount Internal LCY	Specifies the total transport cost in the company's local currency (LCY). This amount represents the internal cost incurred by the company for transporting goods. <i>Trade Plan</i>: the cost is calculated by the system. <i>Manual</i>: the cost is defined by the user. If the calculation is based on the trade plan, the system calculates the cost. If the user changes the value, the transport cost updates to manual, and the trade plans are cleared.
Transport Rate Type	Specifies the type of rate applied to the transport order. This can refer to different rate structures such as flat rates, variable rates based on distance or



	weight, floor space or contractual rates agreed upon with transport service providers. This field value is inherited from the associated trade plan. The <i>Multiple</i> option indicates there are multiple trade plans in the cost lines.
Transport Cost Allocation	Specifies the method used to distribute the total cost across the lines. <i>Floor space</i> : Indicates the system will allocate based on the number of floor spaces for each line. <i>Manual</i> : Indicates the total cost will be allocated by the user. <i>Multiple</i> : Indicates there are multiple trade plans in the cost lines. This field value is inherited from the associated trade plan page.
Location Code	Specifies the location code for this document. If it is blank, the transport request lines associated to the order have different location codes. You can modify the field value if needed.
Planned Start Date Time	Specifies the planned date and time when the pickup or delivery of the items is scheduled to start.
Planned End Time	Specifies the planned time by which the pickup or delivery of the items is expected to be completed.
Planned Departure Date Time	Specifies the planned date and time when the transport carrying the items is scheduled to depart.
Planned Return Date Time	Specifies the planned date and time when the transport is scheduled to return after delivery or pickup.
Pickup Time	Specifies the time when the goods were picked up for delivery, which is used as a reference in the proof of delivery process. This field is visible only when the Aptean POD Integration Connector is installed and can be added through personalization.

Note

- To link a trade plan with a transport order, you must turn on the **Use in Transport Order** toggle on the **Accurals FastTab** of the **Trade Plan Card** page.
- When you change the **Transport Order Cost Amount Internal** field on the **Transport Order** page, the system sets the **Transport Cost Calculation** field to *Manual*.
- The **Transport Cost Allocation** field is not editable when **Transport Cost Calculation** is set to *Trade Plan*. These fields become editable when you change **Transport Cost Calculation** to *Manual*.

4. On the **Shipping** FastTab, enter the relevant information in the following fields:



Field	Description
Driver No.	Specifies the number of the driver, that is inherited from the transport route details of the selected route code, assigned for the transportation. You can modify this value even after it is inherited.
Driver Name	Specifies the name of the selected driver, which automatically populates when selecting a value in the Driver No. field.
Driver Phone No.	Specifies the contact number of the selected driver, which automatically populates when selecting a value in the Driver No. field.
Truck Code	Specifies the code of the vehicle, that is inherited from the transport route details of the selected route code, assigned as a truck for transportation. You can modify this value even after it is inherited. You can select only vehicles that are categorized as <i>Cab</i> , <i>Van</i> , <i>Straight Truck</i> , and <i>Car</i> in terms of their specified type.
Truck Reference Number	Specifies the reference number of the truck, that is inherited from the relevant Vehicle Card page, and used as an additional identifier for tracking the truck. You can modify this value even after it is inherited.
Trailer Code	Specifies the code of the vehicle, that is inherited from the transport route details of the selected route code, assigned as a trailer 1 for transportation. You can modify this value even after it is inherited. You can select only vehicles that are categorized as <i>Trailer</i> , <i>Chassis</i> , and <i>Container</i> in terms of their specified type.
Trailer Reference Number	Specifies the reference number of the trailer, that is inherited from the relevant Vehicle Card page, and used as an additional identifier for tracking the trailer. You can modify this value even after it is inherited.
Trailer Code 2	Select the code of the vehicle that you want to assign as a trailer 2 for transportation. This field is visible only when personalized. You can select only vehicles that are categorized as <i>Trailer</i> , <i>Chassis</i> , and <i>Container</i> in terms of their specified type.
Trailer Reference Number 2	Specifies the reference number of the trailer 2, that is inherited from the relevant Vehicle Card page, and used as an additional identifier for tracking the trailer. You can modify this value even after it is inherited. This field is visible only when personalized.
Trailer Code 3	Select the code of the vehicle that you want to assign as a trailer 3 for transportation. This field is visible only when personalized. You can select only



	vehicles that are categorized as <i>Trailer</i> , <i>Chassis</i> , and <i>Container</i> in terms of their specified type.
Trailer Reference Number 3	Specifies the reference number of the trailer 3, that is inherited from the relevant Vehicle Card page, and used as an additional identifier for tracking the trailer. You can modify this value even after it is inherited. This field is visible only when personalized.
License Plate	Enter the number of the license plate that you want to assign for the selected truck.
Trailer License Plate	Enter the number of the license plate that you want to assign for the selected trailer 1.
Trailer License Plate 2	Enter the number of the license plate that you want to assign for the selected trailer 2. This field is visible only when personalized.
Trailer License Plate 3	Enter the number of the license plate that you want to assign for the selected trailer 3. This field is visible only when personalized.
Van Number	Enter the identification number that you want to display on the exterior surface of the van associated with the transport order. This number serves as a visual reference for easy identification and tracking during transportation.
Container Number	Enter the identification number that you want to display on the exterior surface of the container associated with the transport order. This number serves as a visual reference for easy identification and tracking during transportation.
Railcar Number	Enter the identification number that you want to display on the exterior surface of the railcar, a specialized vehicle designed for transporting goods by rail, associated with the transport order.
Seal Number	Enter the number of the seal that you want to use for securing trailer 1.
Seal Number 2	Enter the number of the seal that you want to use for securing trailer 2. This field is visible only when personalized.
Seal Number 3	Enter the number of the seal that you want to use for securing trailer 3. This field is visible only when personalized.
Loading Sequence	Enter the number of the loading sequence which helps you to sort and prioritize the transport order.

5. On the **Capacity** FastTab, enter the relevant information in the following fields:

Field	Description
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Volume Capacity	Specifies the total volume capacity of the selected vehicles, including the truck and trailers, representing the combined available space for goods. If you later modify the Volume Capacity of the selected vehicles on the Vehicle Card page after the vehicle has been assigned to the transport order, the value in this field is adjusted based on the modified value, even for existing transport orders.
Weight Capacity	Specifies the total weight capacity of the selected vehicles, including the truck and trailers, representing the combined available space for goods. If you later modify the Weight Capacity of the selected vehicles on the Vehicle Card page after the vehicle has been assigned to the transport order, the value in this field is adjusted based on the modified value, even for existing transport orders.
Floor Space Capacity fields	The values that are set as floor space types on the Transport Setup page are presented here as fields, representing the total capacity of the selected vehicles in relation to the relevant floor space types. This calculation is derived from the configuration on the Vehicle Floor Space Capacities page. The floor space types that have not been configured on the Transport Setup page are not visible here as fields, even if they are set up as floor space types for the selected vehicle. If you later configure these floor space types on the Transport Setup page after assigning this vehicle to the transport order, then they will be both displayed here as fields and considered in the calculations, even for existing transport orders.
Calculated Volume	Specifies the total calculated volume of the items in the transport order lines. This field is visible only when personalized.

6. On the **Docking** FastTab, you can view the following fields. These fields are non-editable and can be configured on the **Dock Status Card** page. For more information, see [Configure dock status card page](#).

Field	Description
Dock Status	Specifies the status of the dock. This field is blank by default, indicating no activity has occurred.
Dock Location Code	Specifies the code of the location that is assigned as a dock for the transport order. If the Loading Dock Door Code is selected first before selecting this value, this field inherits the value from the Location Code specified on the selected Loading Dock Door.



Loading Dock Door Code	Specifies the code of the loading dock door that is assigned for the selected dock. Loading dock doors serve as access points to the loading dock area, playing a vital role in facilitating the efficient flow of goods in and out of the facility. The list in this field is filtered to display only the loading dock doors that are configured with the selected Dock Location Code.
Dock Date	Specifies the date when the status of the dock is set to <i>Docked</i> .
Dock Time	Specifies the time when the status of the dock is set to <i>Docked</i> .
Undock Date	Specifies the date when the status of the dock is set to <i>Undocked</i> .
Undock Time	Specifies the time when the status of the dock is set to <i>Undocked</i> .

7. On the **Lines FastTab**, select **Remove from Transport Order** action to delete the related transport cost lines. Adding a new document to the transport order also creates related transport costs. Additionally, you can view the pick and delivery related fields based on the **Request Type** field value.
- The following fields on the **Location Card** page can be configured based on which the pickup and delivery time information are updated.

- Shipping Starting Time: Specifies the earliest time when the location is allowed to start shipping goods.
- Shipping Ending Time: Specifies the latest time by which the location must finish shipping goods.
- Receiving Starting Time: Specifies the earliest time when the location is allowed to start receiving goods.
- Receiving Ending Time: Specifies the latest time by which the location must finish receiving goods.

8. On the **Transport Cost Lines FastTab**, enter the relevant information in the following fields:

Field	Description
Route Code	Specifies the code representing the planned route for the shipment. This can include predefined routes, waypoints, or specific transit paths and is essential for logistics planning.
Floor Space	Specifies the actual floor space used for the shipment. This is measured post-shipment to verify against the planned floor space quantity and adjust costs accordingly.
Source Document No.	Specifies the source document number from which the transport order was generated. This could be an invoice, purchase order, or any other relevant document.



Source Document Type	Specifies the type of the source document associated with the transport order. Examples include invoice, purchase order, sales order and transfer order. This helps in categorizing and processing the transport order appropriately.
Name	Specifies the name of the responsible for the transport order. This could be the sender, receiver, or the logistics provider. Shipment Method Specifies the method used for shipping the goods, such as air, sea, rail, or road. This information is crucial for determining the logistics and costs associated with different shipping methods.
Calculation Base	Specifies the basis on which the transport cost is calculated. This could be based on weight, volume, distance, or any other relevant metric that affects the transport cost.
Planned Floor Space Qty.	Specifies the planned quantity of floor space required for the shipment. This is used for planning and optimizing the loading of the transport vehicle.
Calculated Cost LCY	Specifies the calculated cost of the shipment in the local currency (LCY). This field helps in budgeting and financial planning for the transport order.
New Freight Cost Allocation LCY	Specifies the newly allocated freight cost in the local currency (LCY). This is updated manually by the user when the trade plan is manual. If the transport cost lines have the calculated cost and the new freight cost filled the value of the new freight cost will be used in the assigned documents.
Trade Plan No.	Specifies the trade plan number associated with the transport order. This links the transport order to broader trade and logistics planning documents. When selecting a trade plan, you can only choose from options where the Manual Freight toggle is turned on. If the user changes a trade plan manually the transport cost calculation will turn to manual.
Expense	You can select the checkbox and assign the expense item no. that has been defined on the associated Trade Plan card page. By selecting this checkbox, the system includes the defined item on the associated source document as a new line.



 Note

- The system calculates the **Calculated Cost LCY** field value based on the **Cost Amount Internal LCY** field and the **Planned Floor Space Qty.** field values for each line.
- When the **Transport Cost Allocation** field is set to *Manual*, the system ensures the sum amount of the **New Freight Cost Allocation LCY** assigned to each line is not greater than the defined **Cost Amount Internal LCY** field value.
- You cannot select the **Expense** checkbox on the **Transport Cost** FastTab of the **Transport Order** page, if the expense item number hasn't been defined on the associated trade plan.
- The system automatically assigns item charges to the source document. Opening the **Transport Order** page and executing the **Assign Costs to Document** action assigns trade plans and inserts item charges into purchase and sales documents. Item charge assignment for purchase order lines occurs automatically upon executing the **Item Charge Assignment** action in the purchase or sales document.

9. You can change the planned floor space value in the **Planned EUR** field on the **Lines** FastTab, and the system will update the same for the relevant entries.

10. On the action bar, select **Recalculate Cost**.

The system updates the **Calculate Cost LCY** field value for the defined entry.

The transport order is created.

Configure dock status card page

All the fields above are non-editable and are provided for viewing purposes only. You can edit these fields on the relevant **Dock Status Card** page.

1. On the action bar, select **Home > Dock**.

The **Dock Status Card** page opens.

2. On the **General** FastTab, enter the relevant information in the following fields:

Field	Description
Dock Status	Select the status of the dock. The available options are: Blank: This is the default status of the dock, indicating no activity has occurred. Arrived: The truck has reached the dock, but either the dock is full or not ready to receive it. Dropped: The truck dropped the trailer in the yard and left. Docked: The truck has been assigned a door and is either at the door or permitted to proceed. This option updates the values in the Dock Date and Dock Time fields on the Transport Order page, reflecting the date and time when this status is changed.



	<i>Undocked</i> : The truck has departed from the dock. This option updates the values in the Undock Date and Undock Time fields on the Transport Order page, reflecting the date and time when this status is changed.
Dock Location Code	Select the code of the location that you want to use as a dock for the transport order. If the Dock Status field is set from <i>Docked</i> to blank, the value in this field will disappear.
Loading Dock Door Code	Select the code of the loading dock door that you want to assign for the selected dock. The loading dock doors are filtered based on the selected Dock Location Code and presented in the list. If the Dock Status field is set from <i>Docked</i> to blank, the value in this field will disappear. Loading dock doors serve as access points to the loading dock area, playing a vital role in facilitating the efficient flow of goods in and out of the facility.
Driver No.	Specifies the number of the driver that is inherited from the Driver No. field on the Transport Order card page. You can modify this value, which also updates the Driver No. field on the Transport Order card page.
Driver Name	Specifies the name of the selected driver, which automatically populates when selecting a value in the Driver No. field.
Driver Phone No.	Specifies the contact number of the selected driver, which automatically populates when selecting a value in the Driver No. field.

You can view the **Driver Details** FactBox, which provides insights into key aspects of the driver, on the **Dock Status Card** page. For more information, see [Driver Details FactBox](#).

Add data or delete transport order lines

The transport order lines are an exact copy of the previously selected transport requests. It is possible to edit or delete the transport order lines in the transport order.

On the **Transport Order Lines** page, it is possible to change some of the data. See [Edit Transport Line](#) for an explanation of which fields can be changed.

1. Select **Line**.

Per transport order line, it's possible to view or edit the instructions. Also, changes to the source document can be viewed per line.

2. Select **Remove from Transport Order**.

The transport order line is removed from the transport order. The status of the transport request on which the transport line is based changes from *Planned* to *In progress*.



 Note

- When the transport line is removed the related transport costs are removed as well.
- Changes done to the **Transport Route Code** and the **Stop Sequence No.** fields on sales order and sales return order documents are reflected in the transport order.

Accept function

When changes to source document are made while transport orders were already created for the linked transport requests, it is possible to (view and) accept these changes from the **Transport Order** page in a similar way as is possible on the **Transport Planning** page. To know more, see [Transport Planning](#).

1. Select any number of transport order line(s) with the checkbox **Deleted** or **Changed** selected.
2. Select **Line**.
3. Select **Accept**.
The checkbox **Changed** is cleared.
Transport requests in which the **Deleted** checkbox is selected are deleted by the **Accept** action.
4. Select **Line**.
5. Select **View Change Log Entries**.

By default, a filter is set with an empty **Date and time accepted** field. Clear the filter to see the date and time accepted.

The **Date and Time Accepted** field is now registered.

Print function

There is a possibility to print the transport order or send the transport order to the shipping agent.

1. Select **Reports > Print**.
2. Select the appropriate filters.

Send transport order

It is possible to create a document that can be sent to the shipping agent.

1. Select **Send to**.
2. Choose file type.



Transport

3. Select **OK**.

The file is now created and can be sent.

Print transport order

It is also possible to print the transport order directly.

1. Select the **Print** button to print the report or select the **Preview** button to view it on the screen.

It is now possible to print the transport order.



Create and manage transport order via sales order processing

Article • 6/25/2024 • 4 min read

Integrating transport orders with sales orders streamlines the fulfillment process, reducing errors and enhancing efficiency. This improves visibility, lowers costs, and boosts customer satisfaction and profitability.

With this feature, you can create and manage transport order via sales order processing. The following procedure describes how to perform this activity.

1. Select the Search icon , enter **Sales Orders**, and then choose the related link.
The **Sales Orders** list page opens.
2. Select the preferred **No.**
The **Sales Order** card page opens.
3. On the **Shipping and Billing** FastTab, verify the field values in the **Shipment Method** group.
4. On the action bar, select **Home > Release > Release**.
The sales order is released.
5. On the action bar, select **Related > Order > Other > Transport Requests**.
The **Transport Requests** page opens.
You can view the transport request that has been generated for the defined sales order.
6. Select the Search icon , enter **Transport Planning**, and then choose the related link.
The **Transport Planning** page opens.
7. Select the preferred entry.
8. On the action bar, select **Create Transport Order**.
The **Create Transport Order** page opens.
9. On the **Options** FastTab, configure the relevant field values and click **OK**.
The system redirects you to the associated transport order.
On the **Transport Order** page, you can view the entries on the **Transport Cost** FastTab for the associated sales order.

Note

The **Cost Amount Internal LCY** field value on the **General** FastTab is the sum of the **Calculated Cost LCY** field values associated with the lines on the **Transport Cost** FastTab.



Lump sum calculation in transport order

Article • 6/25/2024 • 2 min read

Lump sum calculation in transport order allows users to apply predefined costs to transport orders based on the source document on the configured trade plans.

This feature ensures efficient and consistent cost allocation across different transport scenarios. The following procedure describes how to perform this activity.

1. Select the Search icon , enter **Transport Orders**, and then choose the related link.
The **Transport Orders** list page opens.
2. Select the preferred **No.**
The **Transport Order** card page opens.
3. On the **Cost Lines** FastTab, in the **Trade Plan No.** field, verify and set up the relevant trade plan number.
4. On the action bar, select **Recalculate Costs**.

After recalculation, the system will apply costs based on the configured trade plan to each relevant line of the transport order.

Upon selecting the **Lump sum** checkbox on the **Trade Plan** card page, the fields **Calculation Rate Type No.**, **From**, and **To** fields becomes non-editable, and the defined **Cost in LCY** field value is equally divided among the cost lines defined on the associated transport order.

If you select the **Lump sum** checkbox for one of the lines, the system verifies the cost based on the defined floor space and calculates accordingly.

Note

- Ensure that floor space codes defined in the transport order align with those configured in the trade plan for accurate cost application.
- Adjust trade plan settings (such as costs, routes, and agents) as per specific business requirements to accurately reflect transport costs.
- If you change a trade plan after assigning it to a transport order, you must select the **Recalculate** action. The system does not automatically check for updates.
- If a line in the trade plan defines a record for the floor space code, that record will be applied to that line. The lump sum will be applied to the remaining lines.



Assign trade plan costs to the source document

Article • 6/26/2024 • 7 min read

Assigning trade plan costs to the source document benefits businesses by enhancing cost transparency and accountability. This enables accurate financial tracking, efficient decision-making, and easier audits.

The following procedure describes how to perform this activity.

1. Select the Search icon , enter **Transport Orders**, and then choose the related link.

The **Transport Orders** list page opens.

2. Select the preferred **No**.

The **Transport Order** card page opens.

3. On the action bar, select **Assign Costs to Documents**.

The system displays a dialog box confirming the creation of trade costs.

You can also assign the costs by selecting **Recalculate Cost > Assign Costs to Documents** on the action bar of the **Transport Order** card page.

Note

- You can assign costs manually on transport order.
- If you change the trade plans manually, the system clears the calculated trade plans and updates the new trade plans.

4. Click **OK**.

The system updates the transport order with the relevant values.

5. On the **Lines** FastTab, select **Line > Source Document Info**.

The **Transport Request Source Document Info** page opens.

6. Select the preferred entry.

7. On the action bar, select **Show Document**.

The source document opens.

8. On the action bar, select **Related > Order > Other > Document Trade Costs**.

The **Document Trade Costs** page opens.

Note

You can also use the **Assign Costs to Documents and Post** action. This action will assign the costs and will post the transport order.



Assign trade plan item charges to the source document

Assigning trade plan item charges to source documents ensures accurate cost allocation and enhances financial oversight. This process streamlines the assignment of freight costs to purchase orders, ensuring all expenses are correctly accounted for and expressed in the source documents.

This feature improves cost management, facilitates accurate financial tracking, and enhances decision-making efficiency. The following procedure describes how to perform this activity.

1. Select the Search icon , enter **Transport Orders**, and then choose the related link.
The **Transport Orders** list page opens.
2. Select the desired **No.**
The **Transport Order** card page opens.
3. On the **General** FastTab, ensure the **Transport Cost Calculation** field is set as *Trade Plan*.
4. On the **Cost Lines** FastTab, in the **Trade Plan No.** field, select a trade plan for which **Accrual Type** field is set as *Item Charge* and **Status** field is set as *Active*.
5. On the action bar, select **Recalculate Cost > Assign Costs to Documents**.
The system displays a dialog box confirming the assignment of costs.
6. Click **OK**.
7. Navigate to the source document linked to the transport order.
8. Verify that the defined item charge has been inserted with the associated details like **Quantity** field with value 1 and **Direct Unit Cost/Unit Price** field value based on the document type.

Note

- If the source document has a shipment or receipt posted, you cannot assign costs.
- If the trade plan is in a different currency code than LCY, the system converts the amount to the document's defined currency.
- You can click the **Assign Costs to Documents** action multiple times, but this will overwrite the existing trade plans assigned.
- If the **Trade Plan No.**, **Calculated Cost (LCY)**, or **New Freight Cost Allocation(LCY)** fields are not filled, you cannot transfer anything to the document trade.

Assign expense item number to the source document

The **Expense Item No.** field categorizes and allocates costs, such as freight expenses, to documents like purchase orders. This capability ensures precise cost tracking and enhances financial transparency in business operations. The following procedure describes how to perform this activity.



1. Select the Search icon , enter **Transport Orders**, and then choose the related link.
The **Transport Orders** list page opens.
2. Select the desired **No.**
The **Transport Order** card page opens.
3. In the **Trade Plan No.** field, ensure the defined trade plan has been configured with relevant value in the **Expense Item No.** field.
4. On the **Cost Lines** FastTab, select the **Expense** checkbox.
5. On the action bar, select **Recalculate Cost > Assign Costs to Documents**.
Upon successful assignment, the system displays a confirmation message.
6. Click **OK**.
7. Navigate to the associated source document and verify that the trade plan and its associated costs have been inserted.
8. Verify the associated details like **Quantity** field with value *1* and **Unit Price/Direct Unit Cost** field value based on the document type. The expense item number has been assigned to the source document.

Note

If the defined trade plan associated with the lines lacks an **Expense Item No.** field value, attempting to turn on the **Expense** toggle will result in an error.



Post transport orders

Article • 2/11/2025 • 8 min read

When all transport lines are completed and all the necessary information is entered on the transport order, it can be posted. When the posting is completed, the transport order and posted transport lines are deleted and a posted transport order is created.

If transport order lines are marked as 'Changed', the system will display a notification when posting the order. When transport order lines are marked as 'Deleted', an error will be displayed, and it is not possible to post the transport order.

The system can automatically create and post a Purchase Order when posting the transport order. A purchase order is created and posted to account for the transport costs. To enable this functionality, ensure that the following configurations are performed on the **Transport Setup** page:

- The **Create and Post Purchase Order** toggle should be turned on.
- The **Item No. Transport Cost Posting** field must have a value.

While posting the transport order, the system operates according to the following scenarios:

Scenario 1: The shipping agent is linked to a Vendor

When the shipping agent in the transport order is linked to a vendor,

1. If the Transport Cost Amount is 0 (zero), the system will notify you that the Purchase Order will not be generated due to the Transport Cost Amount value being 0. The system will only proceed to post the transport order.
2. If the Transport Cost Amount has a value, the system will post the transport order. Additionally, it will generate and post a Purchase Order for the provided transport cost amount, using the vendor linked to the relevant shipping agent.

Scenario 2: The shipping agent is not linked to a Vendor

When the shipping agent in the transport order is not linked to a vendor,

3. If the Transport Cost Amount is 0 (zero), the system will not notify you about the value being 0 because the shipping agent is not linked to a vendor, and generating a Purchase Order is not possible. The system will only proceed to post the transport order.
4. If the Transport Cost Amount has a value, the system will notify you that the Purchase Order will not be generated because the shipping agent is not linked to a vendor. The system will only proceed to post the transport order.

To link a vendor to a shipping agent, see [Link Vendor to a shipping agent](#).



The Purchase Order will have one Purchase Order line with the item that was selected on the **Transport Setup** page. We recommend creating a new item specifically for transportation costs. For more information, see [Transport Setup](#).

The data in the purchase order is copied from the transport header. If all data is correctly filled in the Purchase Order, the Purchase Order is posted immediately. If data is missing, the Purchase Order is created, but not posted. The system will show an error message that indicates which data is missing. The transport order is posted, and the purchase order can be posted manually.

5. Select the Search icon , enter **Transport Orders**, and then choose the related link.

6. Select the required **No.**

7. On the action bar, select **Process > Post**.

A dialog box opens displaying the following message: *Do you want to post the transport order?*

8. Select **Yes**.

The transport order is now posted, and a posted transport order is created. If the **Create and Post Purchase Order** toggle on the **Transport Setup** page is turned on, a Purchase Order is created.

A dialog box opens displaying the Transport Order No., Posted Transport Order No., and Purchase Order No.

9. Select **OK**.

View posted transport order

From the **Posted Transport Order** page, it is possible to see the purchase order and posted purchase invoice lines directly. This way you always have an overview of the documents linked to the posted transport order.

1. Select the Search icon , enter **Posted Transport Orders**, and then choose the related link.

2. Select the required **No.**

The **Posted Transport Order** card page opens.

The **Posted Transport Order** page mirrors the structure of the **Transport Order** page, replicating all the fields and information. For more information, see [Transport order](#).

The Transport Route Code and Stop Sequence No. are visible both on the order and line. But if multiple routes exist, the route code isn't shown on the order but only in the respective lines.

The **Trip No.** field value is displayed on the lines which are not editable. After a transport order is successfully posted, it gets deleted from the **Transport Orders** list page.

Linked purchase order

If the purchase order is automatically created when posting the transport order, then the purchase order is linked to the posted transport order.



1. On the action bar, select **More Options > Related > Purchase Order**.

The created Purchase Order is shown.

Linked posted purchase invoice lines

When purchase invoice lines are created using the **Get Receipt Lines** action on the **Lines** FastTab of the **Purchase Invoice** page, the purchase invoice lines are linked to the posted transport order associated with the posted purchase receipt.

On the **Get Receipt Lines** page, you can:

- View the transport order number associated with the posted purchase receipt in the **Transport Order No.** field.
- On the action bar, select the ellipses button  and then select **Show Document** to view the posted purchase receipt.

On the **Posted Transport Orders** page, on the action bar, select **More Options > Related > Posted Purchase Invoice Lines** to view the posted purchase invoice lines linked to a posted transport order.



Publish reports from transport orders

Article • 5/27/2026 • 2 min read

After you have configured the [document publication setup](#) and the [document publication reports](#), you can publish reports directly from the **Transport Order** and **Posted Transport Order** pages.

1. Select the Search icon , enter **Transport Orders** or **Posted Transport Orders**, and then choose the related link.
2. Select the desired document.
3. On the action bar, select one of the following actions:
 - **Publish**: Opens the **Document Publication** dialog, where you can review and edit the reports to be published. Select **OK** to proceed.
 - **Publish Directly**: Publishes the reports immediately as per the setup, without displaying the dialog.

Note

- The [Document Filter](#) functionality is not supported for Transport Order and Posted Transport Order documents.
- To publish a transport order, the custom category code configured on the **Transport Setup** page must match the category code defined on the **Report Selection/Layout** page for the Transport Order report ID. If the **Transport Order Custom Category Code** field is empty on the **Transport Setup** page, the system throws an error when you attempt to publish from the **Transport Order** page.
- To publish a posted transport order, the custom category code configured on the **Transport Setup** page must match the category code defined on the **Report Selection/Layout** page for the Posted Transport Order report ID. If the **Posted Transport Order Custom Category Code** field is empty on the **Transport Setup** page, the system throws an error when you attempt to publish from the **Posted Transport Order** page.



Integrations

Article • 5/27/2026 • 1 min read

The Aptean Transport extension has been integrated with the following extensions:

- [Aptean Reporting](#)
- [Aptean Packaging](#)
- [Aptean Claims](#)
- [Aptean Trade Management](#)
- [Aptean Integration Platform](#)
- [Aptean POD Integration Connector](#)
- [Aptean E-Commerce](#)
- [Aptean Backorder Management](#)
- [Aptean Document Publication](#)



Aptean Reporting

Article • 3/12/2025 • 1 min read

When the Aptean Transport extension is used in conjunction with the Aptean [Reporting](#) extension, it enables the generation of reports containing transport order details, including information about the driver, truck, trailer, and other related data.



Aptean Packaging

Article • 3/12/2025 • 1 min read

When the Aptean Transport extension is used in conjunction with the Aptean [Packaging](#) extension, you can configure packaging for transport floor types. This integration streamlines the calculation of floor space based on the default packaging of items. For more information, see [Transport floor types packaging](#).



Aptean Claims

Article • 3/12/2025 • 1 min read

When the Aptean Transport extension is used in conjunction with the Aptean [Claims](#) extension, you can create claims for sales and purchase documents. The system will create a claim if it has not already been generated or if the shipment/receipt has been posted. For more information, see [Transport management](#).



Aptean Trade Management

Article • 3/12/2025 • 1 min read

When the Aptean Transport extension is used in conjunction with the [Trade Management](#) extension, the system allows you to calculate and apply transportation costs within sales, purchase, and transfer documents based on configured trade plans, shipment methods, and transportation details.



Aptean Integration Platform

Article • 7/2/2025 • 1 min read

When the Aptean Transport extension is used in conjunction with the [Aptean Integration Platform](#) extension, you can generate a payload that includes transport details such as transport floor space type, delivery start and end times, longitude and latitude, and field values from the **Transport Requests** page during AIP events. Additionally, the outbound event payload generated includes the pickup and delivery details configured on transport documents, such as transport planning and transport order pages.



Aptean POD Integration Connector

Article • 8/27/2025 • 1 min read

When the Aptean Transport extension is used in conjunction with the Aptean [POD Integration Connector](#), you can view the status, drop details, and attributes of the proof of delivery associated with the order.

You can set up the pickup time in the transport request. The associated value appears in related documents, such as the **Transport Order**, **Transport Management**, or **Transport Planning** page. This field is not visible by default and must be made visible through personalization.

You can use the **Mark as Fully Loaded** action on the **Transport Management** page to mark a transport order as fully loaded, indicating that all goods for the order are loaded and ready for transport.



Aptean E-Commerce

Article • 7/2/2025 • 1 min read

When the Aptean Transport extension is used in conjunction with the Aptean [E-Commerce](#) extension, you can define transport route assignments for customers to control the delivery dates available on the e-commerce platform.



Aptean Backorder Management

Article • 1/28/2026 • 1 min read

When the Aptean Transport extension is used in conjunction with the Aptean [Backorder Management](#) extension, the system validates the transport status of the relevant sales order lines the system validates the transport status of sales order lines before allowing backorder actions. If a sales order line is linked to a transport order, backorder management is blocked and quantity movements are not allowed, otherwise, backorder management remains available. For more information, see [What's new in Backorder Management, version 2601.0.0.0](#).



Aptean Document Publication

Article • 5/27/2026 • 1 min read

When the Aptean Transport extension is used in conjunction with the Aptean [Document Publication](#) extension, the system:

- Allows you to publish reports directly from the **Transport Order** and **Posted Transport Order** pages using the **Publish** and **Publish Directly** actions. This enables transport planners to quickly email or print transport order documents to shipping agents without manually downloading reports.
- Supports all email origin options for transport/posted transport order reports, including Fixed, Document, Contact, and Organizational Level.

For more information, see [Set up document publication reports for transport/posted transport orders](#).



Known issues

Article • 2/25/2026 • 1 min read

The table below lists known issues identified across releases. We are actively investigating and resolving them as part of our commitment to continuous improvement.

ID	Description	Status	Found in version	Fixed in version
356794	The system behaves inconsistently as it displays a confirmation message to validate the shipment date when a sales order is created on the Customer Card page and does not display the message when the order is created directly for the same customer. This issue occurs when the related customer is defined with a specific delivery day on the Transport Route Assignment page.	Under Investigation	2601.1.0.0	

