

Carrier Support: Adding Visibility to a New Shipper

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Introduction

1 Introduction

It is important that carrier administrators carefully organize their company settings so that users have visibility to the correct loads. When gaining a new shipper, there are three basic setup steps:

Step 1: Create a [Load Group](#) using the shipper company's name as the Description.

Step 2: Create a [User Assignment](#) that links the shipper's loads to the correct user contact and Load Group.

Step 3: Create an [Advisor](#) for the shipper and Load Group. For **Step 4 - To whom should this TMSAdvisor send messages?**, select the contacts that should receive notifications for this shipper's loads.

Load Groups

2 Load Groups

Load Groups can be used to categorize loads by shipper and/or geographical region. This allows carriers to manage load visibility and Advisor notifications. For example, users can quickly search for loads by Load Group in Execution Status (Load Status > Execution Status).

Creating Load Groups

1. Go to Utilities > Accounts > Load Groups and click [CREATE NEW].
2. Enter the Shipper Name as the **Description** and click [OK].
3. Click [Assign Users] next to the Load Group.
4. Select the users who have **Primary** and **Secondary Group Privileges**.
5. Click [SAVE].

Primary and Secondary Groups

Group privileges are connected to Job Profile permissions. A group can be assigned to a user as either a primary or secondary group. If a function in the TMS is associated to group privileges, the administrator can determine for which groups they are allowed to perform the action. For example, if a user is enabled for primary groups for the "Close Load" feature, they can only close loads for their primary groups. If they are enabled for secondary groups, they can close loads for any of their primary or secondary groups.

User Assignments

3 User Assignments

User Assignments determine which loads are assigned to which Load Group and User. If no User Assignment exists for a load, the load is assigned to the Primary Company Contact and their default load group. User Assignments are also used for [Advisors](#).

Creating User Assignments

1. Go to Utilities > Accounts > User Assignments and click [CREATE NEW].
2. In the Manage User Assignment window, populate the following available fields and click [SAVE] when complete:

Field	Description
Load Criteria	Select a shipper company, Shipper Group, and tender carrier for the assignment.
Primary Contact Assignment	Select the user who is the primary contact for loads within the criteria selected in Load Criteria.
Load Group Assignment	User Assignments can be associated to a specific Load Group.
Origin / Destination	User Assignments can be associated to specific geography.

Note: User Assignments can overlap but they cannot be the same.

Note: The user must log out and log back in for changes to take effect.

TMS Advisors

4 TMS Advisors

TMS Advisors are notifications that inform users about their shipments. Shipper companies may create Advisor Profiles for carriers, so that their Advisor Profile is available to select from when creating an Advisor for their company's loads.

Each user is automatically assigned a default Advisor that sends notifications on loads for which they are the primary contact. This is the "My Advisor." Users can edit their "My Advisor" settings as needed or create additional Advisors for loads for which they are not the primary contact. Advisor Filters can be assigned to certain events to control when the Advisor triggers a notification.

Advisor Profiles

Advisor Subscription Profiles determine which Advisors are available to a group of users. In some situations, shipper companies may create and manage Advisor Profiles on behalf of the carrier.

1. Go to Utilities > TMSAdvisor > Manage Advisor Profiles and click [CREATE NEW].
2. For each Advisor, determine whether the Advisor is available and click [Create]:
 - **Disabled:** Users with this profile subscription cannot subscribe to this Advisor and do not receive it.
 - **Allowed:** Users with this profile subscription can choose to subscribe to this Advisor but do not receive it initially.
 - **Subscribed:** Users with this profile subscription receive this Advisor automatically and when creating their MyAdvisor this is checked; however, they can choose to not receive this Advisor by unsubscribing.
 - **Mandatory:** Users with this profile subscription receive this Advisor automatically and cannot choose to unsubscribe to it. When creating their MyAdvisor this field is checked and the user is unable to unsubscribe.

Creating Advisors

Every user has a default Advisor that sends notifications on loads for which they are the primary contact, called the "My Advisor." You may also create additional Advisors for yourself or others to receive notifications for specific Load Groups or shippers.

1. Go to Messages > Create Advisor.
2. Populate the fields:


Field	Description
<p>Step 1 - Select which Type this TMSAdvisor should watch and, if appropriate, set the Details</p>	<p>Select My Company to apply this Advisor to any orders or loads within the carrier company. Or, use the filter options to apply the Advisor to Load Groups.</p>
<p>Step 2 - Select 'All' or the specific company(s) about which this TMSAdvisor should send messages.</p>	<p>Advisors can be associated to a specific shipper or all shipper companies. The advisor only sends notifications for relevant loads based on these settings.</p>
<p>Step 3 - When should the TMSAdvisor start and end?</p>	<p>Determine the date range for when the Advisor is active.</p>
<p>Step 4 - To whom should this TMSAdvisor send messages?</p>	<p>Select the users that should receive the notifications. Select Myself to apply the Advisor to the current user.</p>
<p>Step 5 - What should this TMSAdvisor be called?</p>	<p>Create a name for the Advisor that clearly indicates the purpose.</p>

3. Click [CONTINUE].


4. For **Step 6**, select the Advisor Subscription Profile to control which events are available to subscribe.
5. For **Step 7**, Determine the events that trigger notifications and the medium (web, email, or both) by which they will be sent. Apply filters to further define when notifications will be sent. For a description of each Advisor: [click here](#).
6. Click [SAVE].

Advisor Filters

Advisors trigger notifications any time an event occurs. Sometimes you only want to be notified of an event when it occurs over a certain threshold. For example, a load increased by 50lbs may not be significant, but a load increased by 5 pallets may require action.

Advisor filters allow you to reduce the number of unwanted Advisors and improve the usefulness of the Advisors that they actually receive. Filters can be applied to one or more events and may be related, creating an and/or relationship between the two filter rules. The filter rule must be "true" for the Advisor to be sent. Events are only eligible for a filter if the Filter  icon appears in the Action column.

Creating an Advisor Filter

1. Click Filter  next to the Advisor and click [CREATE NEW].
2. Manage the following filter settings and click [SAVE] when complete:

Setting	Description
Filter Name	Add a relevant title for the filter.
Filter Rules	Select the conditions that determine when Advisors are sent. Multiple rules can be added to the same filter. Filter rules can be defined by relative comparisons, fixed comparisons, or quantity.

<p>Filter Logic</p>	<p>Determine how the rules are combined. The rules may be set up so that Advisors are sent when the conditions of the rules apply to the load or when the conditions do not apply.</p> <ul style="list-style-type: none"> • Send advisor when ANY of the rules apply: If there are two or more Filter Rules, only one rule must be met in order to trigger a notification. The Filter Rules create an "Or" relationship. For example, you may only want to trigger a Load Modified Advisor when the weight is increased by at least 300lbs, or the pallets increased by 1. • Send advisor when ALL of the rules apply: If there are two or more Filter Rules, every rule must be met in order to trigger a notification. The Filter Rules create an "And" relationship. For example, you may only want to trigger a Load Modified Advisor when the weight is increased by at least 300lbs, and the pallets increased by 1. • Send advisor when NONE of the rules apply: This option allows you to eliminate scenarios from triggering a notification. The Filter Rules create an "And" relationship. For example, you may want to trigger a Load Modified Advisor for all changes, except when you are the Initiating Party and the change was to a TL load. • Send advisor when ANY of the rules do NOT apply: This option allows you to eliminate scenarios from triggering a notification. The Filter Rules create an "Or" relationship. For example, you may want to trigger a Load Modified Advisor for all changes, except when you are the Initiating Party or the change was to a TL load.
<p>Filter Description</p>	<p>The description is system generated based on the rules and logic that apply.</p>

Filter Advisors

Select the Advisors to which the filter should apply. Users can choose to only apply the filter to the web or email version of the message.

Creating Advanced Advisor Filters

Click [SWITCH TO ADVANCED] to further customize the filter logic settings. Advanced Filters allow you to create multiple groupings of dependencies in the Filter Logic section. After creating Filter Rules, select rules to group together in one of the following relationships:

- AND: Both Filter Rules must be true.
- OR: One Filter Rule must be true.
- NOT AND: The notification does not trigger if both Filter Rules are true.
- NOT OR: The notification does not trigger if one of the Filter Rules are true.

Multiple groupings can be created and then grouped together. For example, you may have two AND groupings that are grouped by an OR relationship:

Total weight increased by 300lbs AND total pallets increased by 1

OR

Total volume decreased by 300lbs AND total pallets has decreased by 1

Managing Existing Advisors

Use the Advisor Administration page to view and manage Advisors. This page is useful when a user is receiving Advisor notifications from an unknown source, such as if someone else in the company creates an Advisor that includes them as a recipient. You can determine all of the Advisors to which a user is a recipient using this page, modify the Advisor settings, and remove recipients if necessary.

1. Go to Utilities > TMSAdvisor > Advisor Administration.
2. From the **Action** menu, select **Edit Subscribed Events** and click [Go] to modify the events to which the Advisor is subscribed.

Assign Loads to a User Group

5 Assign Loads to a User Group

By default, loads will be assigned to users based on User Assignment settings. If no user assignment exists for a load, the load is assigned to the user identified as the Primary Company Contact and their default Load Group.

Loads can be reassigned to different users or groups as necessary. However, the user performing the action must have primary group privileges (assigned) to both the Load Group to which the loads are currently assigned and the Load Group to which the loads should be assigned.

1. Go to Load Status > Execution Status and search for the loads.
2. Select the loads to be moved or click [SELECT ALL] at the bottom of the page.
3. From the **Multiple select action** menu, choose the **Assign User Group** and click [GO].
4. In the pop-up window select a **User** (primary contact) and a **Group** (Load Group) from the drop-down menus and click [SAVE].

BluJay Customer Support

6 BluJay Customer Support

There are two ways to reach the BluJay Customer Support Portal:

Direct URL

<https://blujaysolutions.force.com>

From the TMS

Click the Customer Support  icon in the upper right hand corner of any page.

Glossary

7 Glossary

Term	Definition
Advisor	Advisors are messages that a user can subscribe to that will notify them when important events occur, such as a carrier accepting tender of a load. Advisors can be sent via web message in the TMS or via email.
Advisor Filter	Advisor filters allow you to reduce the number of unwanted Advisors and improve the usefulness of the Advisors that they actually receive.
Carrier Performance Report	A report that evaluates a carrier's ability to close loads on time and with complete information.
Console	A tool that aids carriers in tracking the status of loads from tender through delivery.
Contract Rate Request	Requests submitted by shippers to gain contract rates for lanes.
Data Extract	A report that allows carrier users to download and view loads.
Group Privileges (Primary and Secondary Groups)	<p>Group Privileges add an additional level of control to Job Profile permissions, so that users may only have access to use a Job Profile for certain groups (Load Groups).</p> <p>The Primary Group and Secondary Group checkboxes in the Job Profile are related to the Group tab of their user account (Utilities > Accounts > Users). If a user has Primary Group Privileges for a Load Group, then</p>

	<p>they can utilize whichever permissions are enabled in their Job Profile for Primary Groups. If the user is enabled for a Load Group as a Secondary Group, they may have fewer permissions enabled.</p> <p>For example, a user may be provided with all Load Action permissions for their Primary Groups, but only the View Loads and View Load Notes permissions for their Secondary Groups.</p>
Job Profile	Profiles that control permissions and visibility within the TMS for different types of users.
Load	A planned transportation movement that includes one or more shipments, resulting in one or more pickups and one or more deliveries. This is the entity that is tendered to carriers, rated, appointed, executed, closed, and paid.
Load Group	Load Groups are used to categorize loads and control User Assignments. Load Groups are often created on a one-to-one basis with shipper companies.
Load Note	Messages attached to loads that allow shippers and carriers to communicate important information and provides a permanent record of important information on a load.
Rate Change Request	Carriers submit Rate Change Requests to change the rate on a load, typically to add accessorial charges.
Remittance Report	A report that displays all of a shipper's approved payable batches and the details of the loads included in the batches.
Reference #	Reference numbers are identification numbers assigned to orders, shipments, or loads. Unlike the TMS ID, which is system generated, reference numbers are

	external, and may include purchase orders, delivery confirmations, and Bills of Lading. Shippers can choose which reference numbers to enable for their company.
Shipper or Shipper Company	A company that employs carriers to move freight.
SpotMarket	A module which allows shippers to "broadcast" available loads to multiple carriers at once (instead of tendering loads directly to carriers). Any of the carriers who have permission to participate in a shipper's SpotMarket are able to enter an offer rate for the load.
SpotMarket Load Alert	A notification, similar to an Advisor, that notifies carrier users when loads that fit a certain criteria have been posted to a SpotMarket.
Tender	The act of offering a load to a carrier.
Third Party Appointment Scheduling	Allows shippers to grant third party users access to the TMS to schedule appointments at their docks.
TMS ID	Refers to the unique load identification number generated by the TMS.
User Assignment	User Assignments determine the primary user contact and Load Group assignment for tendered loads.
User Location	Carrier company locations, such as corporate headquarters, offices, or domicile locations. Each user will be assigned to a specific User Location.