Carrier Support: Administrative Functions

Version: 25.2.0

Revised: May 18, 2025

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Introduction

1 Introduction

This document explains the administrative functions related to setting up and managing a carrier company. Each shipper may define specific expectations and process steps for the carriers with which they contract. The shipper defines those in separate documents.

Company Information

2 Company Information

Editing Basic Company Information

Make changes to basic company details, such as company address, primary contact, and company units of measure from the General Information page.

1. Go to Utilities > Company > General Information.
2. Modify the information and click [SAVE].

Creating User Locations

Before creating system users, all User Locations should be properly set up. User Locations are the primary locations to which users are assigned, such as a company headquarters or domicile location. Each system user is assigned to a User Location on the Location Info tab of their User Account settings.

1. Go to Utilities > Company > User Locations and click [CREATE NEW].
2. Enter location details and click [Save].

Creating Drivers and Vehicles

Carriers can store driver and vehicle information in the TMS on the Manage Drivers and Vehicle Numbers page. When appointing loads, the driver names and vehicle numbers auto-complete with available information.

Creating Drivers

1. Go to Utilities > Company > Carrier Drivers and Vehicle Numbers.
2. Under **Add Driver**, [Search & Select] the user, enter a **Ref #** to identify the driver, driver contact information, and a **Default Vehicle #**.
3. Click [SAVE].

Creating Vehicles

1. Go to Utilities > Company > Carrier Drivers and Vehicle Numbers.
2. Under **Add Vehicle #**, enter the **Vehicle #** and click [SAVE].

User Information

3 User Information

Creating New Users

Every carrier user must have their own account. Each system user must be associated to a User Location and assigned a Job Profile to manage their permissions. The easiest way to create new user accounts is to copy an existing account with similar information and modify the individual user's information.

1. Go to Utilities > Accounts > Users and click [CREATE NEW].
2. Populate the fields and click [CONTINUE]:

Field	Description
Username	The new user logs in with this username to access the system. Duplicate usernames are not allowed.
Access Level	Determine if this is a user or administrator. By default, administrators have access to user setup administration pages.
Lock Account	Select to deliberately lock a user out of an account. In the event a user locks themselves out of their account by entering an incorrect password too many times, an administrator needs to disable this option.
Login Destination	The default page after login can only be changed when editing an existing user.
Login Point	Leave **Web Portal** selected for typical users. **Integration** and **Web Services** are only used for EDI communication.

Third Party Access	Provides the user third party access. This is typically for appointment scheduling.
Load Comments	Determine whether or not the user can view Load Comments in the results section of the Load Status and SpotMarket.
Load Dates	Determine which additional load dates the user can view in the results section of the Execution Status page.
Show Intermediate Stops	Determine whether or not the user can view Intermediate Stops in the results section of the Execution Status page. If **Yes**, determine which additional values to show to the user.
Default Units of Measure	Determine which unit types to use, if other than the company default.
Maximize Transactional Popups	Choose whether or not pop-up windows (like Load Reports) should appear maximized when accessed by the user.
Default Network Advisor Preference	Determine how the user receives Network Advisor notifications (typically email). Network Advisors are custom Advisor messages created by shippers.
Advisor Email Message Format	Leave Plain Text selected or select HTML (preferred). After an account is saved with HTML selected, the user is sent a test Advisor notification. The user should confirm the test message is successfully received and is properly displayed before relying on HTML Advisors. Users may have to check their spam folder and add the following address(es) to their allowed senders list:advisor@messaging.na.e2open.com & advisor@messaging.oc.e2open.com

3. Select a User Location and click [CONTINUE].

4. Under **Available Profiles**, select a Job Profile. Or, make adjustments to an existing profile. If adjustments are made, the user's permission settings are no longer be linked to the Job Profile, and any changes made to the Job Profile no longer sync to this individual user's account. Click [CONTINUE].

5. Select the **Default Load Group.** Use the **Assign Privileges** drop-down menu to determine the user's privileges to each Load Group. Click [SAVE]. After a new account is created, the user receives two emails from noreply@tms.blujaysolutions.net. The first email is their username and password. The second email contains a link to validate their email address.

Generating User-Specific API Keys

Generating user-specific application programming interface (API) keys is a prerequisite for making API calls in TMS. An API key is used as a password along with the username of a carrier user in TMS to provide secure and basic authentication for making API calls. Administrators can generate user-specific API keys from the Manage Users page for active users. They can also regenerate or disable API keys on a per-user basis.

1. As an administrator, log in to Transportation Management.

2. Go to Utilities > Accounts > Users.

3. On the Manage Users page, click Search to get a list of all users. If required, apply search filters to narrow down your search for active users.

4. Click Generate API Key against an active user of your choice.
Note: to regenerate the API key, click Regenerate.

User Assignments

User Assignments determine each load's primary contact and Load Group. 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.

User Assignments drive the usage of My Advisor. Users not assigned as a primary contact must create Load Group or Company Type Advisors.

1. Go to Utilities > Accounts > User Assignments and click [CREATE NEW].
2. Populate the 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 exactly the same.

Managing Password Rules

1. Go to Utilities > Accounts > Password Rules.
2. Select which settings apply to your company’s passwords.
3. Click [SAVE].

Password Lockout

If a user unsuccessfully attempts to log in 3 consecutive times, the system locks the account. On the Contact Info tab of the user profile, use the **Lock Account** check box to lock and unlock a user from their account.

Job Profile Permissions

4 Job Profile Permissions

Job Profiles restrict a user’s permissions in the TMS to their particular job function. Create different Job Profiles for different user purposes, such as dispatch, accounts receivable, or view only permission. Job Profiles allow you to enable or disable a permission for an entire group of users at once.

Creating Job Profiles

1. Go to Utilities > Accounts > Job Profiles and click [Create New].
2. Enter a **Description** that identifies the job function.
3. Click [VIEW PERMISSIONS] and select the actions that users assigned this profile will be allowed to perform.
4. Click [VIEW MENU VISIBILITY] and select which menu items will be visible to users.
5. Click [SAVE].

Note: When modifying a Job Profile, the user must log out and log back in for changes to take effect.

Available Permissions

Permission	Description	Related Menu Path
Administer Advisors	Search for all Advisors and edit subscribed events.	Utilities > TMSAdvisor > Advisor Administration
Assign Profiles to a Job	Create Advisor Subscription Profiles.	Utilities > TMSAdvisor > Manage Advisor Profiles

Carrier Drivers and Vehicle Numbers	Manage driver and vehicle information.	Utilities > Company > Carrier Drivers and Vehicle Numbers
Carrier User Assignment	Manage the primary contact assignments for loads.	Utilities > Accounts > User Assignments
Create a User Location	Create carrier user locations. Users will later be linked to these locations.	Utilities > Company > User Locations
Document Center	Share documents with shippers.	Documents
Edit Carrier EDI Error Subscriptions	Determine which EDI errors trigger an email notification.	Utilities > Integration > Error Subscription
Manage Company Information	Edit basic company information, such as address and units of measure.	Utilities > Company > General Information
Manage IP Address Security Profiles	Manage IP Addresses.	Utilities > Accounts > IP Address Security Profiles
Manage Job Profiles	Modify user permissions.	Utilities > Accounts > Job Profiles
Manage Load Groups	Create groups to categorize loads.	Utilities > Accounts > Load Groups
Manage Users	Create and modify carrier user profiles. If a "User"	Utilities > Accounts > Users

	as defined in the Access Level setting in User Information is assigned this permission, they will only be able to view and modify their own information and settings.	
Manage TMSAdvisor Profile	Create and modify company advisor notification profiles.	Utilities > TMSAdvisor > Manage Advisor Profiles
Modify a User Location	Edit carrier user locations.	Utilities > Company > User Locations
Password Rule Settings	Determine company standard password rules.	Utilities > Accounts > Password Rules
Run reports	Run company reports.	Any available reports.
View a User Location	View all carrier user locations.	Utilities > Company > User Locations
Create TMSAdvisors for myself	Create a TMSAdvisor to trigger notifications for the current user.	Messages > Create Advisor
Create TMSAdvisors for other internal users	Create a TMSAdvisor to trigger notifications for other users.	Messages > Create Advisor
Create a SpotMarket Load Alert	Manage notification settings when loads are posted to the SpotMarket.	Messages > Create SpotMarket Load Alert

Delete TMSAdvisor	Allows user to delete TMSAdvisors from the View Advisors page.	Messages > View Advisors
Modify Settings	Determine which events the advisor triggers web or email notifications for (edit subscribed events).	Messages > View Advisors
Modify TMSAdvisor	Allows the user to modify TMSAdvisor settings, such as which companies apply or when the advisor is effective (modify settings).	Messages > View Advisors
Task Assignment	Manage tasks assigned to loads.	Load Status > Manage Tasks
Use Advisor Filter	Set advisor filters to minimize unnecessary advisors from being generated.	Messages > View Advisors OR Messages > Create Advisor
View Advisors	View enabled TMSAdvisors and SpotMarket Load Alerts.	Messages > View Advisors
View Messages	View Advisor web messages.	Messages > View Messages
Dedicated Fleet Planning Tool	For dedicated fleet carriers only.	Load Status > Dedicated Fleet Planning Tool
Accept Tendered Load	Allows a user to accept tender of a load.	Accept Loads

Close Load	Allows a user to close a load.	Load Status > Execution Status
Create Check Call	Allows a user to enter a check call update on a load.	Load Status > Create Check Call
Create Load Note	Add a load note to communicate with the shipper.	Load Status > Execution Status
Download Load Documents	Download documents attached to a load.	Load Status > Execution Status
Finalize Load	Finalizing loads confirms to the shipper that the rate is correct and can be transferred to settlement.	Load Status > Execution Status
Make Appointment	Allows a carrier user to enter appointment details on a load.	Appoint Loads
Rate Review Status	View the status of rates on loads.	Load Status > Review Rate Status
Reject Load	Allow a carrier user to reject tender of a load.	Appoint Loads
Remove Load Documents	Delete documents attached to a load.	Load Status > Execution Status
Request Rate Change	Request a rate change or accessorial charge on a load.	Load Status > Execution Status

Upload Load Documents	Attach documents to a load.	Load Status > Execution Status
View Financial History	View a log of all events related to rating and settlement on the load.	Load Report
View Load Note	View notes attached to loads by shippers and other carrier users.	Load Status > Execution Status
View Loads	View all loads currently in execution.	Load Status > Execution Status
Console	Enables the carrier Supply Chain Monitor Console. The Console allows carriers to track load milestones and identifies issues or potential failures.	Console
Contract Rate Requests - General	View and manage requests for contract rates from shippers.	Utilities > Contract Rate Requests
View Document History	When managing documents on a load, view a log of all document changes.	Load Status > Execution Status
Can use SpotMarkets	Allow carrier users to search for and view SpotMarkets.	SpotMarket
Enter offer	Allow carrier users to enter offers on	SpotMarket

	SpotMarket loads.	
Modify Offer	Allow carrier users to modify offers on SpotMarket loads.	SpotMarket
Remove Offer	Allow carrier users to remove offers from SpotMarket loads.	SpotMarket
View Offer History	View a history of offers made on the SpotMarket load.	SpotMarket
View Tour	View Tour Reports.	Anywhere the Tour ID appears as a link.
Use Payment	Use the load settlement feature in the TMS.	Utilities > Settlement
View Invoice	View the Invoice Report for a load.	Anywhere the Invoice # appears as a link.

Load Groups

5 Load Groups

Load Groups categorize loads by shippers and/or geographical regions. This allows the user to easily manage load visibility and Advisor notifications.

Creating Load Groups

1. Go to Utilities > Accounts > Load Groups and click [CREATE NEW].
2. Enter a clear and concise **Description** to identify the group 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.

TMS Advisors

6 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
Step 1 - Select which Type this TMSAdvisor should watch and, if appropriate, set the Details	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.
Step 2 - Select 'All' or the specific company(s) about which this TMSAdvisor should send messages.	Advisors can be associated to a specific shipper or all shipper companies. The advisor only sends notifications for relevant loads based on these settings.
Step 3 - When should the TMSAdvisor start and end?	Determine the date range for when the Advisor is active.
Step 4 - To whom should this TMSAdvisor send messages?	Select the users that should receive the notifications. Select **Myself** to apply the Advisor to the current user.
Step 5 - What should this TMSAdvisor be called?	Create a name for the Advisor that clearly indicates the purpose.

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.

Filter Logic	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. • **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.
Filter Description	The description is system generated based on the rules and logic that apply.

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

7 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].

SpotMarket

8 SpotMarket

The SpotMarket allows shippers to procure rates for Lanes, typically because they are adding a new Lane or require additional capacity on a Lane. A shipper posts a load and allows carriers to submit pricing. The shipper then reviews the offers and awards the load to the preferred carrier.

SpotMarket Load Alerts notify a carrier user when loads that meet a desired criteria are posted on the SpotMarket.

Enabling a User for SpotMarket

1. Go to Utilities > Accounts > Job Profiles and click [Modify] next to the user profile.
2. Click [SpotMarket Actions] and enable the permissions.
3. Click [VIEW MENU VISIBILITY]. Enable **SpotMarket**.
4. Click [SAVE].

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

Creating SpotMarket Load Alerts

SpotMarket Load Alerts send users notifications when loads are posted to the SpotMarket that match their desired load criteria. Carriers will also only receive SpotFinder Load Alerts for loads that match their existing SpotMarket Load Alert filters.

1. Go to Messages > Create SpotMarket Load Alert.
2. Select the criteria to filter (destination information, Equipment Type).
3. Enter an **Effective Date Range** for when the alert is active.
4. Choose a **Notification Method** for how the alerts should be delivered.
5. Enter a **Description** to identify the alert and click [SAVE].

Managing Load Alerts

Modify existing Load Alerts on the View Advisors page (Messages > View Advisors).

Contract Rate Requests

9 Contract Rate Requests

Shippers submit Contract Rate Requests to carriers to quickly solicit rates from carriers on specific Lanes. This reduces the amount of time it takes to reach an agreement on a rate prior to tendering the load. The shipper and carrier are able to negotiate a rate within the TMS and review the activity in an audit history.

Enabling a User for Contract Rate Requests

1. Go to Utilities > Accounts > Job Profiles and click [Modify] next to the user profile.
2. Click [Miscellaneous Actions] and enable **Contract Rate Requests - General**.
3. Click [VIEW MENU VISIBILITY]. Expand **Utilities** and enable **Contract Rate Requests**.
4. Click [SAVE]. : The user must log out and log back in for changes to take effect.

Carrier Capacity Requests

10 Carrier Capacity Requests

Shippers submit Carrier Capacity requests to systematically request capacity information from carriers for one or multiple Lanes. This is useful when capacity is unknown for a new Lane or it fluctuates during a specific season. After carriers receive capacity requests from the TMS, they have the option to respond by entering the information manually or via a spreadsheet upload. Shippers either approve or reject each response. The information in approved responses is used by shippers during load tendering.

Enabling a User for Carrier Capacity Requests

1. Go to Utilities > Accounts > Job Profiles and click [Modify] next to the user profile.
2. Click [VIEW MENU VISIBILITY]. Expand **Utilities** and enable **Carrier Capacity Requests**.
3. Click [SAVE].

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

Document Management

11 Document Management

Carriers can manage documents in two ways. The Load Documents feature allows carrier users to upload and download documents by attaching them directly to loads. The Document Sharing feature allows shippers and carriers to share documents without a load.

Enabling a User for Load Documents

1. Go to Utilities > Accounts > Job Profiles and click [Modify] next to the user profile.
2. Click [Load Actions] and enable:
   - **Download Load Documents**
   - **Remove Load Documents**
   - **Upload Load Documents**
   - **View Document History**
3. Click [SAVE].

Enabling a User for Document Sharing

1. Go to Utilities > Accounts > Job Profiles and click [Modify] next to the user profile.
2. Click [Administration/Reports Actions] and enable **Document Center**.
3. Click [VIEW MENU VISIBILITY] and enable **Documents**.
4. Click [SAVE].

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

Reporting

12 Reporting

E2open provides carriers with pre-defined reports that carriers can run to quickly access important information.

Currently Available Reports

Report	Description	Menu Path
Carrier Performance Report	This report provides insight into a carrier's performance within three categories: • Loads closed with time window issues • Loads closed without time window issues • Loads closed with incomplete data	Utilities > Reporting > Carrier Performance
Remittance Report	The Remittance Report displays the approved payable batches by shipper. It also shows information that was included on batched loads for a specific date range.	Utilities > Reporting > Remittance
Data Export	Use this report to download general load information. For example, a carrier may run this report to download the details of all loads in "Accepted" status that are	Utilities > Reporting > Data Export

	supposed to be delivered this week.	

Report Run Log

After running a report, download it from the Report Run Log page.

- Go to Utilities > Reporting > Report Run Log.

Tips for Running a Report

- Use the available field options to narrow the report results. Including a lot of data may cause the report to take longer.
- Change the **Output Format** to fit your end needs.
- If the **Delivery Method** is set to **Return Results**, the report runs immediately.
- If the **Delivery Method** is set to **Email Results**, the report can be sent to other recipients.
- If the report download box does not immediately appear, you can access the report from the Report Run Log.

Settlement

13 Settlement

If a shipper uses the settlement feature of the TMS, the carrier can monitor the payment status of loads from the Load Payment Status page.

- Go to Utilities > Settlement.

This page allows the carrier to quickly determine if a payable has been transmitted to the shipper's system for payment and if payment has been received.

Tips for Using this Page

- Search for individual loads by the TMS ID or search for loads by shipper.
- Use the **Payment Confirmation Received** search filter to identify loads that are paid. A check number or ACH Transaction ID appears in the **Paid Ref #** column when payment is received.
- If the status of a load's payment is "On Hold," the shipper has prevented the load from moving forward in their payment system for some reason.

Glossary

14 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)	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). 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

	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. 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.
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.