Version 8.5.3.007

Bug Fixes

- Fixed issues with Master Carrier maintenance saving Carrier User data information.
- Fixed bug where pickup and destination fee allocation from settlement page were not being correctly applied.
- Fixed bug in scheduler where appointments were booked with previously selected appointment on drop.
- Fixed bug in Carrier Equip Code maintenance. Save was not working.

Enhancements

- Security
  - Modified Default CSF and Warehouse report settings.
  - Complete new Microsoft Single Sing on using Azure/Microsoft ID (2 factor authentication is now supported)
- Workflow Parameter Settings
  - LaneLeadTimeAutomationMonths: Company supported parameter to activate automation. The value will indicate the number of historical months for Statistical Analysis set to 0 for off.
  - LaneLeadTimeAutomationBufferDays: Company supported parameter to apply a buffer for lead time calculation. The value will indicate the number of days to apply as a buffer.
  - LaneLeadTimeAutomationMinDays: Company supported parameter to apply a minimum number of days for lead time calculation. The value will indicate the number of days to use as a minimum.
  - LaneLeadTimeAutomationMaxTransDays: Company supported parameter to apply a maximum trans days validation, any trans days over value will be excluded from the analysis, values of zero indicates include all.
  - LaneLeadTimeAutomationDaysByMile: Company supported parameter to apply a minimum trans days based on Lane Miles, divide Lane Miles by value and use results for minimum LaneTLTBenchmark value applied via Statistical Analysis Procudure.
  - BookLeadTimeLTLMinimum: Company supported parameter to apply a minimum trans day for LTL less than 10,000 lbs, If the booking is less than 10,000 lbs. set the lead time to this value, ignore if zero.
  - BookProductionLeadTimeDays: Company supported parameter to apply a production Lead Time for last minute orders when the lane allows for

automated ship date calculations, new bookings will be adjusted if needed by number of days in value.

- BookProductionLeadTimeUpdateRequired: Company supported parameter to apply a production Lead Time for last minute orders and update the required date when the ship date changes, 0 for off and 1 for on default is on.
- LaneTransLeadTimeOutboundCalcTypeDefault: Company supported parameter for Default Lane Lead Time Calc Type on New Outbound Lanes, values 0 = None, 1 = Calculate Ship Date, 2 = Calculate Required Date.
- LaneTransLeadTimeInboundCalcTypeDefault: Company supported parameter for Default Lane Lead Time Calc Type on New Inbound Lanes, values 0 = None, 1 = Calculate Ship Date, 2 = Calculate Required Date.
- LaneTransLeadTimeOutboundLocationOptionDefault: Company supported parameter for Default Lane Lead Time Location Option on New Outbound Lanes, values 0 = None, 1 = Compare By State, 2 = Compare By City , 3 = Compare By 3 digit postal code range.
- LaneTransLeadTimeInboundLocationOptionDefault: Company supported parameter for Default Lane Lead Time Location Option on New Inbound Lanes, values 0 = None, 1 = Compare By State, 2 = Compare By City , 3 = Compare By 3 digit postal code range.
- LaneTransLeadTimeOutboundUseMasterLaneDefault: Company supported parameter for Default Lane Lead Time Location Option on New Outbound Lanes, values 0 = Off, 1 = On.
- LaneTransLeadTimeInbundUseMasterLaneDefault: Company supported parameter for Default Lane Lead Time Location Option on New Inbound Lanes, values 0 = Off, 1 = On.
- LaneOutboundTLTBenchmarkDefault: Company supported parameter for Default Lane Transit Lead Time Days on New Outbound Lanes, value = minimum transit days.
- LaneInboundTLTBenchmarkDefault: Company supported parameter for Default Lane Transit Lead Time Days on New Inbound Lanes, values = minimum transit days.
- LaneOutboundOLTBenchmarkDefault: Company supported parameter for Default Lane Order Lead Time Days on New Outbound Lanes, value = minimum Order or Production Lead Time days.
- LaneInboundOLTBenchmarkDefault: Company supported parameter for Default Lane Order Lead Time Days on New Inbound Lanes, value = minimum Order or Production Lead Time days.
- MapEquipToPickListBookTypeCode: Company supported parameter used to map the equipment name to BookTypeCode as Level of Service for Dynamics integration , values 0 = Off, 1 = On.
- BookLeadTimeMultiStopDelayHours: Company supported parameter used to add hours to each stop used to adjust the lead time. The last stop is always zero.
- BookLeadTimeHoursofService: Company supported parameter for default hours of service per day used to estimate drive times.

LaneLeadTimeAutomationDaysByMile parameter divided by BookLeadTimeHoursofService = miles per hour.

- MapEquipCodeToPickListBookCarrierEquipmentCodes: Company supported parameter used to map a default API Service type to the BookCarrierEquipmentCodes in the pick list export for integration.
- GlobalAPIUseNMFCCodes: Turn the ability to pass NMFC codes to API rates on or off; value of 1 is on and a value of zero {0} is off.

- Pick List Exportz: added new mapping and default values for the fields below (see Parameter changes for more details):
  - BookCarrierEquipmentCodes: maps to default values in CarrierEquipCodes default is 4, DRY53,   Dry 53 FT Van: used to populate; maps to Transportation Method in D365.
  - BookCarrierTypeCode: maps to BookModeTypeControl if zero default is 3, road.
  - BookShipCarrierProNumber: if this value is empty the system will use the BookSHID.
  - CompNumber: added logic to use legacy ACXAlphaNumber first then CompAlphaCode then CompNumber last (note ACXAlphaNumber is for backward compatibility only).
  - BookTypeCode: use MapEquipToPickListBookTypeCode options to turn this feature on. This feature is used to map Service Level information to the ERP (D365).
    - use BookTypeCode if provided except when the value is 'N/A' support for legacy values.
    - Next use BookCarrTarEquipName as the service: this is populated by the API Integration.
    - When BookCarrTarEquipName is empty use BookCarrTarName: this is populated by the Selected Tariff when not using API.
    - If all values are empty use 'Spot'
  - BookShipCarrierNumber: when empty use the CarrierSCAC when this is empty use the TMS CarrierNumber. BookShipCarrierNumber should be populated by the API when a broker selects a carrier .
  - BookShipCarrierName: when this is empty use the CarrierName. BookShipCarrierName should be populated by the API when a broker selects a carrier .
- Load Planning/Routing
  - New Lead Time Calculation methods.
  - New Calculate ship and/or required date settings.
  - Added a global parameter to turn off sending NMFC codes.
  - Added production lead time buffer to allow adjustments to ship date.
  - Added parameter to turn off adjustments to required date.
- Automation: see details in parameter changes above.
  - Default values on new lanes.
  - Added production lead time buffer to allow adjustments to ship date on last minute orders.

- Added parameter to turn off updates to new order required date when production lead time buffer is applied (just update ship date).
- Added LTL lead time buffer .
- Added lead time miles per day .
- Added default multi-stop delay in hours for unloading and out of route processing.
- Added default hours of service per day.

New Features

- Added New TMS Mode Type "Parcel" we now suppot "Air", "Rail", "Road", "Sea", "Service", and "Parcel".
- Standardized Equipment Service Types
- Modified the Scheduler search date options to use a 28-day window by default.
- Added the ability to select None as a value for the HDM option on Accessorial Fee configuration.
- Removed the required dependency for the HDM dropdown on the Accessorial Fee Maintenance page in the web.
- Added new Status messages to Load Board

Version 8.5.2.006

Bug Fixes

- Fixed issues where it was not possible to book a delivery appointment for transfer orders via the Scheduler
- Fixed issues where carrier's could not reject a load from the Tendered page in the web portal.
- Fixed Tariff import from spread sheet on distance rates where rate per mile was not saving.
- Fixed Fuel Allocation Issues on multi-stop loads
- Fix bug in Load Board: Field column positions do not save for user
  - NOTE: Applies to web load board pages
- Fix bug Load Board Revenue. Divide by zero error
- fixed bug for zero miles in allcoation by miles logic

Enhancements

- NEXTrack
  - Added new logic to print Load Tender Sheet from Carrier All page in Web
  - Replaced the word Null with Open on Settled page when paid date is empty
  - Carrier's can reject loads from Tendered page
  - Added parameters (see below) for fuel tolerance on carrier updates to fuel
  - Added the ability to enter a Billed Date on the Settlement Freight Payment Page

- - Added the ability to modify the Line Haul Cost on the Settlement Freight Payment Page
  - Added "OK Cancel" validation on Settlement save Freight Payment page
- Security
  - modified Default CSR and Warehouse Report Settings
  - Added new Customer Log on capabilities to web portal for track and trace.
  - Enhanced menu options for customer/carrier security. Restricted access to new pages.
  - Added new logic to allow administrators to change the level of security by Legal Entity
    - 1 = equal Legacy (default)
    - 2 = Strong
    - 3 = Strongest
  - Added new logic to use the level of security to enfource password strength
    - 1 = minimum of 6 characters (any type)
    - 2 = at least
      - 1 lower case letter
      - 1 Upper case letter
      - 1 number
      - 1 special character like !@#$%^&*()\-__+.
      - 8 total characters or more
      - 3 = at least
      - 3 lower case letter
      - 2 Upper case letter
      - 2 number
      - 1 special character like !@#$%^&*()\-__+.
      - 8 total characters or more
  - Added the ability for Legal Entity Admins to force all users to change their password
  - Fixed Issue with "reset all security settings" action item on "LegalEntityMaint" to work as expected.
- Parameter Changes:
  - FuelChargeWillAlwaysUseEarliestPickDate: Company parameter always use the earliest load date on a shipment when determining the avg fuel cost when off the current date will be used to determine the avg fuel cost, 0 = off 1 = on. The default is on.
  - AutoAcceptCarrierFuelTolerancePerLow: Company parameter which will auto accept a carrier modified fuel charge when the total is less than X percent below the estimated cost; value should be whole number like 5. The default is 5
  - AutoAcceptCarrierFuelTolerancePerHigh: Company parameter which will auto accept a carrier modified fuel charge when the total is less than X

percent over the estimated cost; value should be whole number like 5. The default is 5

- Integration
    - Payables
        - Added new logic to continue process data even if one fails
        - Errors are now reported on one email for each batch
        - More details about each failure is included in the email report/notification.
    - Added new web services pages to main web site. Single URL is available
    - Finish Picklist and AP Export web services to include item details for freight costs, fuel, fees etc.
    - Add logic to resend AA Status Bookings for AP Export on the Load Board
    - Modified the web service used to process payable data to continue processing all provided records if one fails.
        - A single message with details about all errors at the end of the procedure
        - additional record details are added for any failures
        - changes are only available when using version 70 or later of the payables web service integration.
    - Pick List status update Modified the use of BookCarrierTypeCode for TMS Integration. We now map this data to support level of service
        - Order Header Record in POCarrierTypeCode
- Load Planning/Routing
    - API
        - On boarding of API carriers has been enhanced
        - Added the capability for API Support for Rate Shopping:
            - CH Robinson
    - Added new load status messages to the Web Load Board like:
        - Planning
        - Delivered
        - AP Pending
        - AP Approved
    - Updated Trimble Maps Address Error Reporting
    - Added fields to Load Board: temperature and Mode
    - Change Caption on Load Board: remove caption "Number" from NGL Pro (note: change from BookPRO to NGL Pro) and Carrier Pro fields change
    - Added new status messages for Matched, Pending, Approved, and Paid freight bills to the Load Board
    - Added list of fees when entering a freight bill to the Load Status book track table
- Automation:
    - Add ability to turn on Ship Confirmation from TMS on Scheduler Check Out. Only suitable when ERP cannot send Ship Confirmation.
- Financial

- Add logic to resend AA Status Bookings to Pick Worksheet/AP Export/ERP on the Web AP Audit Approval Page and the Web Load Board
- Add the ability to display the Order Number on the Invoice Quick Edit page
- Added new logic to correct fuel updates for shipments based on earliest load date. This is on by default now
- Add logic for Limit Lane to Carrier to allow API carriers
  - Note: Carrier Contract and Service are required for Dispatching
- Added new logic to update the AP Freight Bill Number with changes from the booking record if manually changed in the Load Details or Load Board.
  - This does not update the ERP or Dynamics data if the AP Export has already executed.
- Added support for the following load status messages
  - Code 80 -- Freight bill received
  - Code 77 -- Freight bill pending approval
  - Code 73 -- Freight bill outside of tollerance
  - Code 70 -- Freight bill Approved

- System
  - Added new web configuration page to manage TMS Batch Operations
  - added company level parameters for fuel tolerance
  - fixed total fuel query to only select valid fuel costs
  - added new tolerance message format (easier to read)
- Scheduler
  - Confirmation logic in Pick List Status Update on scheduler check out.
    - send data for available appointment data like Trailer number and driver info etc
  - added workflow to ignore trailer number on grouping appointments when:
    - "SchedulerGroupBySHIDForAppointments" is true; this is on by default
    - if "SchedulerGroupBySHIDForAppointments" is on and "SchedDontGroupByEquipmentWhenGroupBySHIDForAppts" is on the system will not compare equipment/trailer numbers. this is only used for LTL Pool trucks
    - When using LTL Pool Trucks it is recomended that "SchedulerGroupBySHIDForAppointments" is off and all the load dates must match.
    - New workflow added: "SchedDontGroupByEquipmentWhenGroupBySHIDForAppts"
      - This workflow is used to ignore the "group by equipment" option when the following parameter is turned on "SchedulerGroupBySHIDForAppointments"
      -
- New Pages
  - Added visibility via web to Nat Fuel Zones Maintenance

- Added new Batch management page to configure TMS Tasks to System Menu in Web "Task Manager"
- Added new Load Board Financial page and navigation buttons to all Load Board Child Tables
- Database
  - Fixed performance issue when processing expired orders. In a large database a time out could occure. We Optimized the query in a stored procedure.
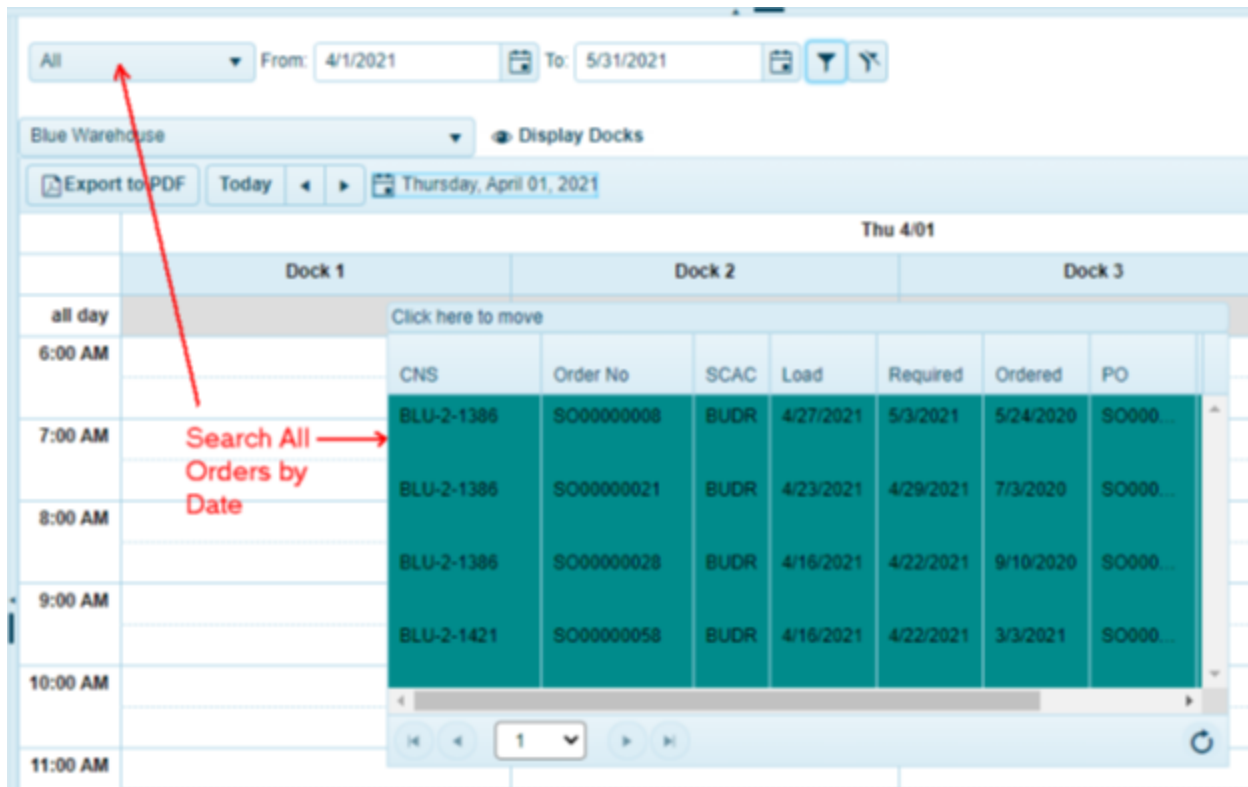
Version 8.5.1

Bug Fixes

- Fixed issues with web-based assignment of Lane Preferred Carrier settings not saving.
- Added logic to auto select the default carrier contact, if configured, to Lane Preferred Carrier Settings.
- problem with the scheduler dates being converted from different time zones & fixed miscellaneous reported scheduler issues
- Fixed issues where the "Item Act Freight Cost" was not updating correctly
- Fixed Tariff import rules to deal with blank or empty Equipment Name

Scheduler Enhancements

It is now possible to search for all orders by date range in the Scheduler

Added new Scheduler fields to Pick List Status update web services

- BookCarrTrailerNo -- > Trailer Number
- BookCarrSealNo -- > Trailer Seal
- BookCarrDriverNo -- > Driver Number
- BookCarrDriverName -- > Driver Name
- BookCarrRouteNo -- > Carrier Route Number
- BookCarrTripNo -- > Carrier Trip Number

Workflow Settings (parameter) Enhancements

- Added Company Level Parameter, SchedulerConfirmOnCheckout, to generate ship confirmation status update on Carrier Check Out.
  - o Turn on to update ship confirmation status on check out in scheduler. Works with ImportAddConfirmedToPicklist for pick list. 0 = off value of 1 = on
- Added Company Level Parameter, SchedulerSetDeliveredOnCheckout, automatically updates the delivered date when a pickup in the scheduler is checked out.
  - o Turn on and enter a number of days for expected transit time to delivery. Enter a value of 1 to turn on a value of 0 to turn off. And the number of transit days in the text value of the parameter.
- Added Company Level Parameter, SchedulerGroupBySHIDForAppointments, to assign the same appointment to all orders on the SHID if using the same pickup or delivery location.
  - o Set the value to 1 to turn on set to 0 to turn off.

API Integration Enhancements

- Added Support for CH Robinson API Rate Shopping
- Added support for TLS 1.2

Web Service Integration Enhancements

- Added New Web Service and Web Methods for data integration for v-8.0 and 8.5 data components
- Added new web service URL for single public DNS mapping. Support for Cloud Implementation
- Added LineHaul, Fuel, and Fees allocation to Item details in Pick List and AP Export web services
-

Version 8.5.0

Bug Fixes

- Fixed Content Management:
  - Extended the current page content management to match new requirements above and to allow both Legal Entities and Users to make additional customizations.
  - Some settings must be locked by (a) System and (b) Legal Entity
- Fixed Field chooser issues on Grid (widget)
- Fixed Document Upload Page: link documents to Load Board page with viewer window.
  - Add Document Type
  - Must work on Smart Phone
- Fixed Responsive Design: identify issues that may impact a responsive design
  - How can ensure users on smaller devices, like smart phones, have access to the menus, actions etc...=

Enhancements Menu Tree

- Provide an improved user experience with the following functionality.
  - System Default Setting: all changes must support the ability to reset to the current system defaults
  - Legal Entity will have the ability to create multiple options for each Role that are available to users.
  - Each user can now be able to customize the following:
    - Name/Caption
    - Color/Font
    - Bold/Style
    - Nested Links:
      - Drag and Drop from one Header to another Header

- Select from a list of available pages based on security
- Name/Caption
- Color/Font
- Bold/Style
  o All settings stored in SQL Server via REST Services
  o KPI landing pages associated with Company & Carrier header pages

- Added new "Favorites" option to menu tree
- Update Menu Settings by clicking on gear (see below)

Enhancements Load Board

  o Added new configurable filters to Load Board
  o Page/Grid User Filter Settings: extended the ability to save the selected filter, visible columns, and sorting settings to allow for multiple saved versions.
  o Added full Drag and Drop options
  o Users can save view options:
    - Horizontal/Vertical
    - Number Columns/Rows
    - Optimizer Settings (new feature being developed)

- Link to images associated with transportation providers and location data
  - Provide the ability to upload images and convert to thumbnails
  - Images are available to all users on the same Legal Entity but not to other Legal Entities
  - Provide ability to use System Default images
- Map Selected Routes: add system parameter to max number of routes to show on map.
  - Each route should have a different color.
  - Show color code by route.
  - Added sequence number or sorting option
  - Added Load Consolidation or grouping by column
- Added Maintain System Defaults: users can reset to system defaults
- Added Create Legal Entity Defaults: users can reset to one or more pre-configured settings
- Added Share with other Users: a page setting can be saved to the Legal Entity shared list of settings. Note: Super Users will have the ability to share settings with all Legal Entities.
- Added Share filters with similar pages: Provide a cross reference where the same filters can be used on multiple pages.
- Added Selected Filter: the most recent active filter will be loaded by default, across all cross-reference pages.
- Added Filter in New Window or Tab: provide a switch where users can select to apply on current page, open in a new Tab, or open in a new window.

Version 8.4.0

Bug Fixes

- Fixed a problem with the scheduler dates being converted from different time zones & fixed miscellaneous reported scheduler issues
- Fixed issues where the "Item Act Freight Cost" was not updating correctly
- Fixed Tariff import rules to deal with blank or empty Equipment Name
- Fixed Rate Shopping – Clicking "On Clear" Button does the following:
  - set ship date to today & set delivery date to one week from today
  - set Total Wgt = 500
  - set Total Qty = 1
  - set Total Pkgs = 1
  - update Package data with defaults
- Fixed issues with the Lane Maintenance pages in D365 web where Receiving and Delivery time windows were not working.
- Fixed issues with the Load Board pages in D365 web where the Origin and Destination time windows were not working.

User Maintenance

- Added Optimization and Route planning capabilities
- Scheduler now updates key booking fields allow mapping between appointment and booking data like Truck ID, Driver Name etc.
- Added new fields and column widths to the Appointment and Order Search in the Scheduler
- Scheduler now updates key booking fields to allow mapping between appointment and booking data like Truck ID, Driver Name etc.

- Added new logic to Duplicate the current booking information when adding additional freight charges to a shipment like Dock Fees or Export Charges
- Updated the following User Maintenance pages
  - Carrier
  - Lane
  - Company
  - EDI
  - Preferred Carrier
  - Lane Fees
  - Lane Profile Specific Fees

Load Tendering

- New Allow Carrier to Accepts & Book Appointments by Email token - Settings in Lane Screen.
- New Booking Appointment Token logic.
- New Carrier Accept Reject by Email Settings
- New Carrier Accept Reject Token logic
- Add logic to place booking on hold for Optimizer and Consolidation stamping
- Finished Consolidation Stamping logic on Load Board
- Added Optimization and Route Planning capabilities
- Improved Route Planning when using the Routing Guide

New Pages In The Web App

- Carrier Items
  - Carrier Fuel Index
  - Nat Fuel Zones
  - Fuel
  - Equipment
- Lane Items
  - Lane Trans Load
- Planning & Execution Menu
  - Claims
- NEXTrack Items
  - NEXTrack Only Reports
- Other Items
  - Company Details
  - Lane Details

New Actions in Menus In The Web App

- Lane Actions
  - ReCalc Lat Long
- Carrier Actions
  - Update All Fees
- Planning
  - Duplicate Pro
  - New Sequence
  - ReCalc – Tariff
  - ReCalc – Fees
  - Map It !
  - Adjust Credit

- Toggle Stamp
- Trans Load
- New Maintenance Screen for Trans Load Cross Dock settings
- Extended Tool Tip functionality on pages to show more hover over information.
- Added Claims Maintenance
- Extended List System List Maintenance
- Included new Trimble Map ALK PC-Miler Web Edition
- Added several new views for data under various Navigation Menus
- Added new sorting and grouping logic for the web load board when grouped by consolidation number.
- Added new validation for API integration Postal Codes
- Added new Fuel Addendum Maintenance logic to the Web Carrier Fuel and Tariff Fuel pages
- Hide columns and data per screen by restricting access by security group type
- New Financial Workflow Company level parameter to require a ship confirmation for the freight bill to pass audit
  - Set the APAuditRequireShipConfirmation parameter value to 1 for on/active or 0 for off

Reporting Workflow Enhancements

- Modified the Reporting Workflow: added a new company level parameter setting used to turn the HTML version of the BOL Report on or off. The default value for the AllowHTMLBOLReport parameter is off. Note: this setting is only applied to the Quick Print reports on the Load Detail page and the Load Status Board in the Desktop Client.
- Modified the Reporting Workflow: added a new company level parameter setting used to control the BOL popup window on Dispatching. The default value is on for the AutoDisplayBOLReportOnDispatch is on.

Integration Workflow Enhancements

- Integration Workflow: Added new logic to extend the size of phone number and postal code fields in bookings and Lanes to 20 characters to support international data integration. To implement the changes integration must use web methods for v-8.4 or newer. This update has been incorporated into NAV 2018 and all BC integration modules.

Technical Enhancements

- Enhanced error reporting messages and display window
- Added Credit Hold Maintenance to Web Load Board
- Added Group By Logic to web grids
- Extended the save user filter procedures
- Added errors and logs to the Rate It booking option on the Web Load Board
- Added new Fuel Addendum Maintenance logic to the Web Carrier Fuel and Tariff Fuel pages
- Split the FM Task Service into two separate Windows Services to increase speed and reduce extended CPU spikes: Freight Master Task Service & Dynamics TMS Routing Service
- Update user security Lane Restriction logic
- User Validation, Performance and Security enhancements.
- Speed improved on loading additional pages after user has been authenticated
- New Security added to prevent users from opening older book marks when security profile has changed.

- Added errors and logs logic to the Rate It! booking option on the Web Load Board

No Longer Supported

- Existing web service methods for Pick List Status Updates and AP Export version 6 (and earlier) are no longer supported due to support for international postal codes and phone numbers.
  - Integration will be updated as part of 8.4 or in later upgrades to TMS. Added new fields and column widths to the Appointment and Order Search in the Scheduler
  - Added new logic to Duplicate the current booking information when adding additional freight charges to a shipment like Dock Fees or Export Charges
  - Extended the capabilities of the TMS PRO Number and CNS Number assignment to support backward compatibility
  - Added logic to create or update the packages when one or more of the following fields are modified
    - Total Wgt; Total Qty; Total Pkgs.