

MUST HAVE TMS FEATURE CHECKLIST

Fine-tuning the functionality of the right-fit TMS is necessary to move the search process forward. Change Leaders should approach this with a two-part checklist.

1. THE BASICS

Can the TMS perform the day-to-day shipment execution you need? Typical “basic TMS” functionality can include the following:

TRANSPORTATION PLANNING & EXECUTION

- Route and mode optimization
- Carrier selection and tendering
- Shipment booking and document generation (BOL, POD, labels)

VISIBILITY & EVENT MANAGEMENT

- Real-time tracking and milestone updates
- Exception alerts and issue management
- Integration with GPS, ELD, or telematics devices

PERFORMANCE & CARRIER MANAGEMENT

- Carrier rate and contract management
- Scorecards and KPI dashboards
- Service level and spend tracking

FINANCIAL SETTLEMENT & AUDIT

- Invoice auditing and reconciliation
- Dispute resolution
- Payment processing support

INTEGRATION & DATA MANAGEMENT

- System integration with ERP, WMS, and carriers
- EDI/API capabilities
- Centralized data access for operations and reporting

WHAT OTHER CORE FUNCTIONS DO YOU RELY ON?

2. NEXT-LEVEL FUNCTIONALITY

These features go beyond operations and support long-term strategy, cost savings, and better decision-making. Check any that apply to your needs:

ADVANCED ANALYTICS & CONTINUOUS IMPROVEMENT

- Dashboards with actionable KPIs
- Root cause analysis tools
- Prescriptive recommendations (AI/ML-driven)

INTELLIGENT PLANNING & OPTIMIZATION

- Dynamic load consolidation and planning
- Auto-add bulk tendering
- Scenario modeling (e.g. cost-to-serve, what-if analysis)
- Network design tools

CONTROL TOWER & END-TO-END VISIBILITY

- Multi-tier, multi-modal visibility
- Exception management with real-time alerts
- Integration with supplier and customer systems

MARKETPLACE & ECOSYSTEM INTEGRATION

- Access to load boards and freight marketplaces
- Dock scheduling and yard management integration
- Connections to carrier and fleet systems

CUSTOMER & USER EXPERIENCE

- Self-service portals for booking and tracking
- Partner access management (carriers, suppliers)
- Customizable user roles and interfaces

OTHER ADVANCED CAPABILITIES?
