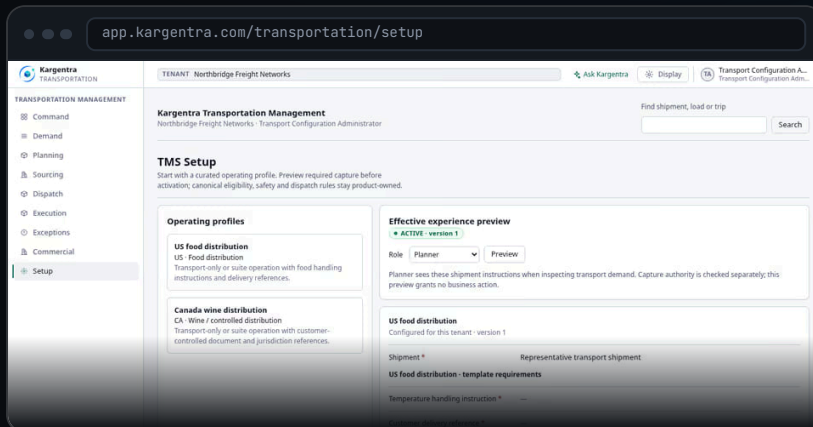


● ADMINISTRATION & CONFIGURATION

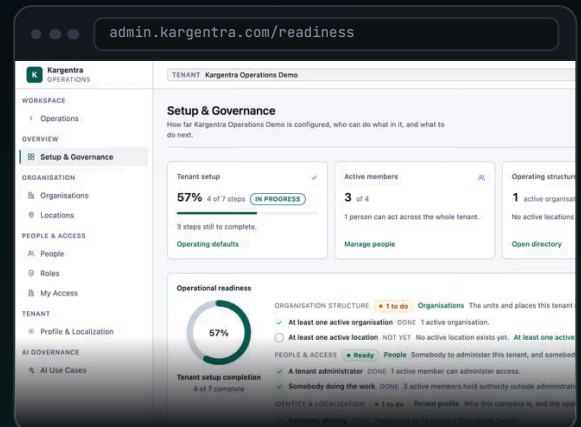
Administration & Configuration

A no-code logistics workflow builder that changes what runs

Administration is Kargentra's no-code logistics workflow builder, where you decide how your operation works: which of nine order-to-delivery stages Kargentra runs and which stay with systems you already own, which templates, forms and policies apply, who can do what, and how the workspace looks. Every change is previewed for a named person and role first, and the API enforces the same decision the navigation shows.



TMS SETUP · OPERATING PROFILES WITH THE EFFECTIVE POLICY AND ITS HISTORY



ADMINISTRATION · OPERATIONAL READINESS WITH EACH DIMENSION AND THE OWNER OF THE NEXT STEP

WHAT CHANGES FOR THE OPERATION

Coexist instead of re-platform

Keep the WMS or TMS you already run. Kargentra takes the stages you hand it and never marks an external stage as done on its own.

The preview is the product

Effective Preview, navigation and the API read one availability decision, so no menu item appears that fails on click and no screen hides a permission the API would still grant.

Go-live from facts, not a checklist

Readiness is computed across 14 dimensions from the system's own state, and each blocker has an owner, a link to fix it and evidence.

Access an auditor can follow

Every permission traces to a versioned role and to the API contract that requires it, and every change lands in the audit history.

WHAT ADMIN DOES

Process Composer

Choose who runs each of nine canonical stages, from order intake to billing readiness: Kargentra, an external system with governed data exchange, an external system updated by hand, or not applicable.

- Order intake, acceptance, warehouse fulfilment, transport planning, carrier sourcing
- Dispatch release, delivery execution, delivery completion, billing readiness
- Draft, compare against the live route, activate a new version

Configuration Studio and templates

Platform and tenant templates bundle custom fields, forms, workflows, operating policies, experience, AI defaults, integrations and the process route. Apply them atomically and keep your own overrides when a template is upgraded.

- Per-item preview: Will be added, Will get a new version, Already matches, Your change is kept
- Needs setup by you and Cannot be applied stated before anything changes
- Save the current configuration as a reusable template

Effective Preview

Pick a person and a role and see exactly what they get: products, modules, route, forms, policies, integrations, AI, Context Layer and the screens offered, with the reason for each.

- Each blocker links to the place to fix it
- The same decision the API and navigation use
- Unknown facts render explained and inert, never as a working link

Tenant-composed operations

Run TMS on its own, WMS on its own or the full connected platform from one tenant. One availability decision across subscription, process stage and module activation drives what users see and what the API allows.

- Not in subscription, purchased but not switched on, run outside Kargentra and not in route are distinct states
- Template-driven order forms agree with server validation
- Direct API calls that bypass the screen are refused

Onboarding readiness

Go-live readiness is derived from live facts across 14 dimensions, from tenant identity and package to process route, connector chain, initial data, AI configuration and people.

- Headline: Ready to go live, or Blocked: N things must be fixed first
- Area chips: Ready, Blocked, Needs attention, Not needed
- Each blocker has an owner, a deep link and evidence

Data & Integrations

The one-time initial import is kept separate from ongoing integration. Activation projects take source data through profiling, mapping, ownership, validation and reconciliation to Ready for Pilot.

- Dataset catalogue: Supported, Governed but not yet loadable, Not supported
- Per-connection steps from sealed credential to first successful exchange
- Replay without duplicate effect

HOW IT FLOWS

From a blank tenant to a governed go-live

- 01 Package assigned**
A platform administrator assigns a published package and sets the first tenant administrator. The tenant cannot entitle itself.
- 02 Template applied**
Start from a platform template for your operation type and preview every field, form, workflow and policy it adds before applying it.
- 03 Route composed**
In the Process Composer, decide which of the nine stages run in Kargentra, run externally with governed exchange, are updated by hand or do not apply.
- 04 Systems connected**
Bind each external stage to a connection, seal its credential, test, discover and approve a mapping version.
- 05 Data loaded**
Run the initial import through profiling, mapping, validation and reconciliation to Ready for Pilot.
- 06 People and roles**
Invite people, assign versioned roles and check the result with My Access and Effective Preview.
- 07 Readiness proven**
Onboarding readiness reads Ready to go live only when all 14 dimensions are satisfied by real data.

CAPABILITY REFERENCE

Process Composer

- Nine canonical order-to-delivery stages
- Four ownership modes per stage
- Protected and configurable steps
- Versioned route with a diff against live
- External-connected stages bind a system and connection
- Shared route guard for workflows and native writes

Configuration Studio

- Platform and tenant templates
- Custom fields, forms, workflows and operating policies
- Atomic apply with per-item preview
- Overrides kept on template upgrade
- Effective Preview for a person and role
- Change History by area

Onboarding readiness (14 dimensions)

- Tenant identity, package assigned, product activation
- Operating structure and initial administrator
- Process route and template workflows and forms
- Connector boundaries, credential and test, discovery
- Mapping approval and first exchange
- Initial data, AI configuration, roles and users

Tenant-composed operations

- TMS-only, WMS-only and full connected compositions
- One effective-availability decision for API, preview and navigation
- Distinct states for subscription, activation, external and route
- Stage-ownership guard at native write seams

Access and identity

- People directory with membership lifecycle
- Versioned role catalogue
- My Access explainer with warnings
- Permission named on every API operation
- Single sign-on across every portal

Experience and branding

- Governed theme selection for the tenant
- Theme applied to the workspace, customer portal and driver app
- Contrast and tap-size guardrails
- Driver app follows the tenant theme in light and dark
- Tenant languages including right-to-left

STANDARDS AND CONNECTIONS

CONNECTOR HUB

REST API WITH OPENAPI CONTRACTS

ASYNCAPI EVENTS

SIGNED WEBHOOKS

EDI X12 204 TRADING PARTNERS

OIDC SINGLE SIGN-ON

QUESTIONS BUYERS ASK

Can I change logistics workflows without code?

Yes. In the Process Composer a tenant administrator chooses who runs each of nine order-to-delivery stages, saves a draft, compares it with the live route and activates a new version that new orders follow. Configuration Studio applies fields, forms, workflows and policies from templates. These changes alter what the API permits and what users see, not only the menus.

ASK KARGENTRA IN ADMIN

"Why can this dispatcher not see Carrier sourcing?"

The Dispatcher role at the Riverside DC site grants dispatch release but not the carrier sourcing permission, and Carrier sourcing is set to External, connected in route version 4, so the screen is not offered to anyone. Go-live is blocked by two dimensions: the external carrier system has no approved mapping version, and import project ACT-07 has not reached Ready for Pilot.

ROLE · DISPATCHER V3

PROCESS ROUTE · VERSION 4 · CARRIER SOURCING

ONBOARDING READINESS · MAPPING APPROVAL

ACTIVATION PROJECT ACT-07

PROPOSAL · APPROVED BY THE TENANT ADMINISTRATOR OR
INTEGRATION ENGINEER WITH MAPPING APPROVAL PERMISSION

Open the mapping draft for the carrier connection and request approval of version 2.

Ask Kargentra reads only what your role can open, cites every fact and proposes. A named person approves; nothing is sent or executed on its own.

EXCEPTIONS AND EDGE CASES HANDLED

- A stage marked as run externally refuses local writes with an ownership conflict, so the external system stays the only owner.
- A template item that conflicts with a tenant override keeps the override and says so, instead of overwriting it silently.
- An external stage with no bound connection blocks go-live with the stage named and a link to bind it.
- A dataset Kargentra cannot load yet is listed as Governed but not yet loadable, rather than failing during import.
- Access that survives removing a role is flagged in the explainer, so least privilege can be proven.
- A navigation fact that cannot be resolved renders as explained and inert, never as a working link that fails.



See Administration & Configuration on your own scenario

Bring a real lane, site or exception. More at www.kargentra.com/products/administration/

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