

How to send automatic milestone and document request emails

Cloudex TMS can automatically request shipment updates and missing documents from the carrier during transport.

Instead of manually contacting the carrier to ask whether the cargo has been loaded or delivered, or to request a POD/CMR, Cloudex can send these requests automatically according to the planned loading and delivery dates.

The request emails are sent to the **Carrier transport manager email**.

The carrier receives a secure link to the shipment and does not need to log in to Cloudex TMS.

What can Cloudex request automatically?

Depending on your company settings, Cloudex can send the following requests:

Loading

Check loading details

Sent before the planned loading date.

The carrier can check or update:

- Planned loading date/time
- Truck/Trailer number

Confirm loaded

Sent on the planned loading date if loading has not yet been confirmed.

The carrier can:

- Confirm that the shipment has been loaded
- Update the Planned loading date/time if loading is delayed

- Update the Truck/Trailer number

When loading is confirmed, Cloudex records the **Actual loading date/time**.

Delivery

Check delivery plan

For longer transports, Cloudex can ask the carrier to check the delivery plan before the planned delivery date.

The carrier can update the **Planned delivery date/time** if the plan has changed.

For example, this request can be configured to be sent only when there are more than 2 days between the agreed loading and delivery dates.

Confirm delivered

Sent on the planned delivery date if delivery has not yet been confirmed.

The carrier can:

- Confirm that the shipment has been delivered
- Update the Planned delivery date/time if delivery is delayed
- Upload required delivery documents if they are already available

When delivery is confirmed, Cloudex records the **Actual delivery date/time**.

If documents are not yet available, they can be uploaded later.

Follow-up requests

If the carrier does not confirm delivery, Cloudex can automatically send follow-up requests.

For example:

- 1 day after the Planned delivery date
- 2 days after the Planned delivery date

Cloudex can also send reminders when delivery has already been confirmed but required documents are still missing.

Depending on the shipment, required documents can include:

- POD / CMR

- Pallet exchange document
- Other required shipment documents

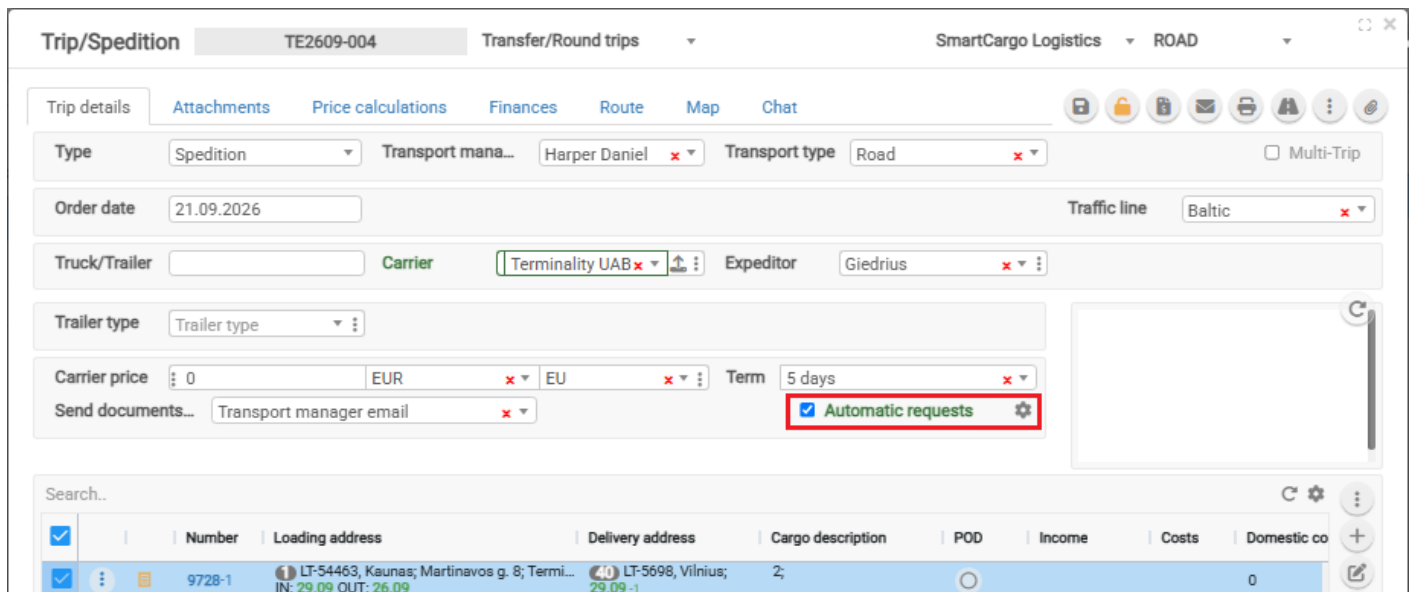
Cloudex sends document reminders only while the required documents are still missing.

Enable automatic requests for a Trip/Spedition

Open the required **Trip/Spedition**.

In the carrier section, enable:

Automatic requests



The screenshot shows the 'Trip/Spedition' form for TE2609-004. The 'Send documents...' section includes a dropdown for 'Transport manager email' and a checkbox labeled 'Automatic requests' which is checked and highlighted with a red box. A settings gear icon is next to the checkbox. Below the form is a table with columns: Number, Loading address, Delivery address, Cargo description, POD, Income, Costs, and Domestic co. The table contains one row with data for a trip from Kaunas to Vilnius.

Number	Loading address	Delivery address	Cargo description	POD	Income	Costs	Domestic co
9728-1	LT-54463, Kaunas; Martinavos g. 8; Termi... IN: 29.09 OUT: 26.09	LT-5698, Vilnius; 29.09 -1	2;				0

When this checkbox is selected, Cloudex can send automatic milestone and document requests for this Trip according to your company's **Automatic email request settings**.

Automatic milestone and document requests will be sent to the Carrier transport manager email.

The carrier must therefore have a valid **Transport manager email**.

The settings icon next to **Automatic requests** opens the company-level automatic request settings.

Automatic email request settings

The automatic request schedule is configured separately for each Cloudex company.

Open **Automatic email request settings** to define which requests should be sent and when.

Automatic email request settings

Company: SmartCargo Logistics

These settings define when Cloudex automatically asks the carrier to update shipment milestones and documents

LOADING

☒ Check loading details

Send day before planned loading at

Carrier can update planned loading and Truck/Trailer.

☒ Confirm loaded

Send on planned loading day at

Carrier confirms actual loading or updates the plan.

DELIVERY

☒ Check delivery plan

Send day before planned delivery at

Only if transport duration is more than days

☒ Confirm delivered

Send on planned delivery day at

Carrier confirms actual delivery or updates the plan.

FOLLOW-UPS

☒ Delivery follow-up

Send and days after planned delivery at if delivery is still not confirmed.

☒ Missing document follow-up

Send and days after actual delivery at if required documents are still missing.

Receiver

Carrier transport manager email

Saved: 28.09.2026 11:29 JanisV

Save

Cancel

The settings include:

Loading

Check loading details

Example:

“ Send 1 day before planned loading at 15:00.

Confirm loaded

Example:

Send on planned loading day at 12:00.

Delivery

Check delivery plan

Example:

“ Send 1 day before planned delivery at 15:00.
Only if transport duration is more than 2 days.

Confirm delivered

Example:

“ Send on planned delivery day at 12:00.

Follow-ups

Delivery follow-up

Example:

“ Send 1 and 2 days after planned delivery at 09:00 if delivery is still not confirmed.

Missing document follow-up

Example:

“ Send 1 and 2 days after actual delivery at 09:00 if required documents are still missing.

The recipient is always:

Carrier transport manager email

These are company-level settings. You do not need to configure the schedule separately for every Trip.

What does the carrier receive?

The carrier receives a simple email containing the shipment information and a button that opens the secure Cloudex shipment page.

Depending on the request, the carrier can:

- Update Planned loading or delivery
- Update Truck/Trailer
- Confirm loading
- Confirm delivery
- Upload POD/CMR and other required documents

No Cloudex TMS login is required.

Cloudex does not send a request if the requested action has already been completed. For example, if delivery has already been confirmed, Cloudex does not continue asking the carrier to confirm delivery.

Here is an example of an email that was viewed on a phone:

Loading

Confirm loaded

Please confirm whether the shipment has been loaded. If not, the planned loading date/time.

#TE2609-004

PLANNED LOADING

26.09.2026 10:00

TRUCK/TRAILER

-

LOADING

Terminality UAB

LT-54463, Kaunas, Martinavos g. 8

Confirm loaded

Daniel Harper

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View sent automatic request emails

All emails related to a Client order can be viewed directly from the **Client order**.

Open: **Client order** → **Sent Emails**

The list shows all sent emails connected to that order, including automatic carrier request emails.

Client order

9728

Delivered

SmartCargo Logistics

Baltics

Order details

Additional fields

Sent e-mails

Attachment(s)

Price survey

Status history

	Date sent	Mail from	To	CC	BCC	Subject	Email type
☐	30.09.2026 10:36	janis.veldre@clou	janis.veldre@clou			Check loading details - TE2609-004	
☐	30.09.2026 10:40	janis.veldre@clou	janis.veldre@clou			Apstiprinu uzkraušanu - TE2609-004	
☐	30.09.2026 14:21	janis.veldre@clou	janis.veldre@clou			Apstiprinu piegādi - TE2609-004	
☐		janis.veldre@clou	info@clouDEX.lv			Missing delivery documents - TE2609-004	

Saved: 30.09.2026 14:19 JanisV

Delete

Save

Cancel

For example, you can see:

- Check loading details
- Confirm loaded
- Confirm delivered
- Missing delivery documents
- Other emails sent regarding the Client order

This makes it easy to verify **what was sent, when it was sent, and to which email address.**

Example workflow

A typical shipment could work like this:

1. **1 day before loading**

Cloudex asks the carrier to check Planned loading and Truck/Trailer.

2. **Loading day**

Cloudex asks the carrier to confirm that the shipment has been loaded.

3. **Before delivery**

For a longer transport, Cloudex asks the carrier to check the Planned delivery date/time.

4. **Delivery day**

Cloudex asks the carrier to confirm delivery and upload available delivery documents.

5. **After delivery**

If required documents are still missing, Cloudex sends document follow-up requests.

The forwarder therefore does not need to manually monitor every shipment date and repeatedly contact carriers for routine updates.

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