

Project status reporting



🔍 Problem

The challenge faced by the company was to enable their clients to easily track the progress of their individual make-to-order projects, access product certificates, invoices, and other documentation, using a centralized point of access, without involving a dedicated employee having to communicate this information. All this information was already accurately managed in Business Central, but since the external clients, naturally, cannot access the internal ERP system, they had to be provided with needed updates via email.

✅ Solution

To address the aforementioned challenges, the company implemented Xpand Portal that seamlessly integrated with the Microsoft Dynamics 365 Business Central, thereby delivering an effective tool for providing external customers with predefined access to

operational planning. By synchronizing the portal with the Business Central, using our own tool - Xpand Portal Connector, which provides easy integration, the client is now able to forget about sending any updates to their clients. All they need to do now, is to keep maintaining their operational and financial information in their ERP, while the automatic portal synchronization and secure permissions on the portal take care of sharing updates and issued documents with the clients, ensuring that each client has access only to the respective project and documentation.