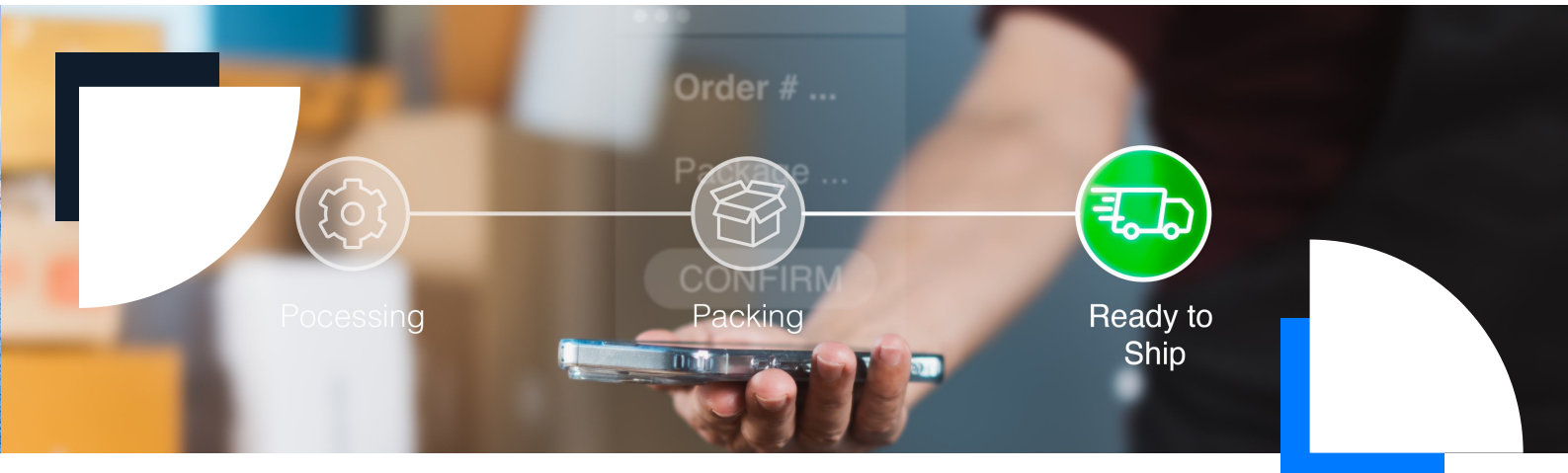


Real-time stock & delivery visibility with Xpand Portal



Problem

A European fresh produce importer and distributor was growing fast, but their logistics visibility was stuck in manual mode.

Information about stock and deliveries was scattered across several systems: ERP, internal tools, warehouse systems, and email. To answer even simple questions, internal teams had to export data into Excel, prepare custom overviews, and send them to each customer.

This created several issues:

- Customers couldn't see what quantities were available, what was already reserved, and what was final without asking someone internally.
- Managers lacked an aggregated, reliable overview across companies for planning and control.
- Operations and sales support teams spent too much time producing reports instead of managing the process.

Under the hood, Xpand Portal connects to Business Central via Xpand Portal Connector, synchronizing stock and delivery data while remaining configurable and extendable. As processes evolve, new pages, grids, or calculations can be added without rebuilding the solution from scratch.

Intro before solution

Before approaching Xpand, the company had already tried to improve transparency by sharing periodic Excel reports and summary emails. But as order volumes and customer expectations grew, this model stopped working:

- Data was often out of date by the time it reached the customer.
- Each customer wanted a different cut of the information (by origin, item, delivery date, etc.), which meant more manual work.
- Managers lacked an aggregated overview across all companies and customers for planning and forecasting.

At the same time, opening direct ERP access to customers wasn't an option, both for security and usability reasons. They needed:

- A secure, role-based web portal where each user only sees relevant data
- Read-only, fast grids for self-service instead of custom reports
- A branded experience that reinforces trust and professionalism

This is where Xpand Portal's configurable platform and the verticalized customer portal solution on top of it became the right fit.

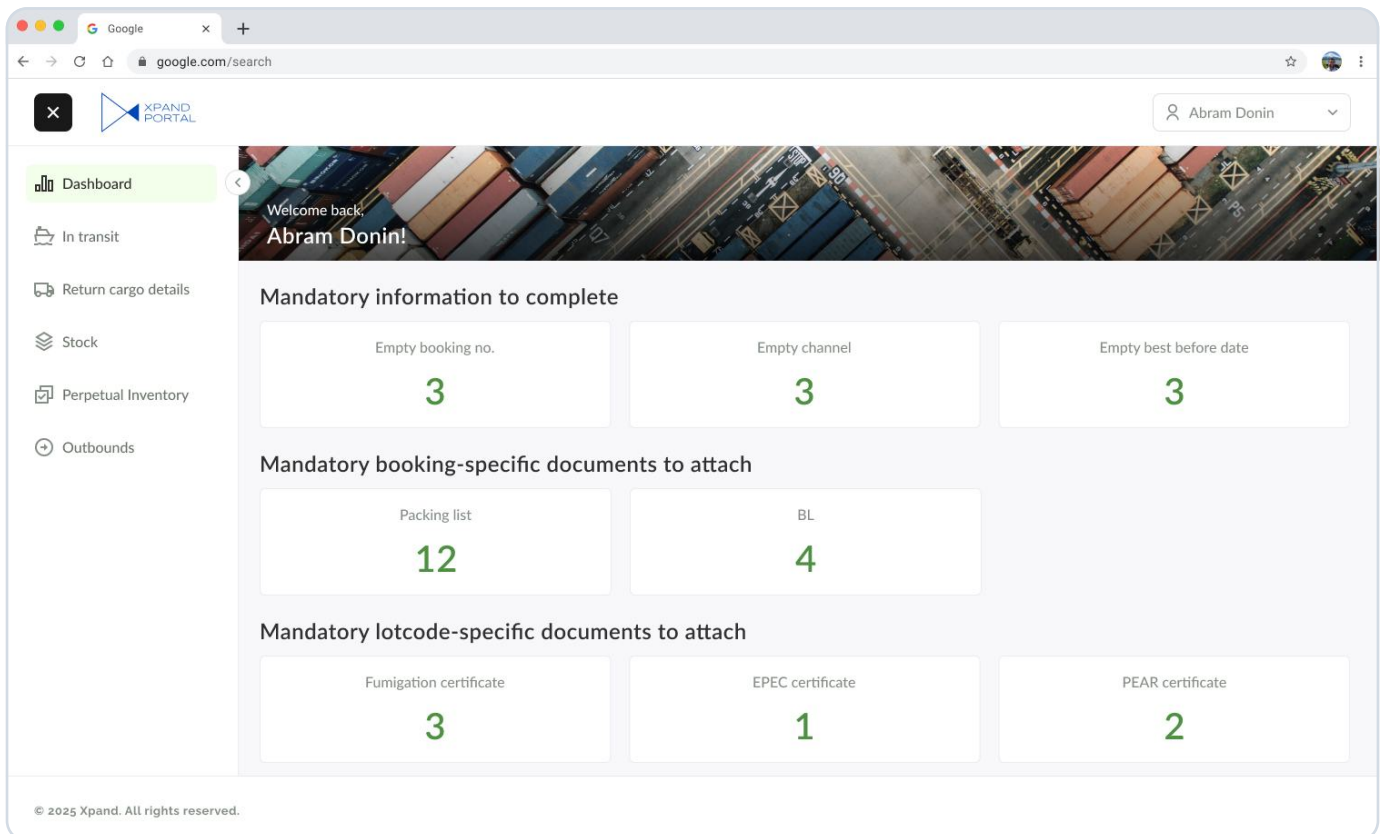
Solution

Xpand implemented the Portal, a secure customer platform built on Xpand Portal, tailored for fresh produce logistics and integrated with the client's back-end systems.

The portal provides role-based access to commercial stock, physical stock, and deliveries, so every stakeholder can see the same trusted information in real time, but only for the companies and data they are allowed to access.

Key elements of the solution:

✓ Actionable home dashboard

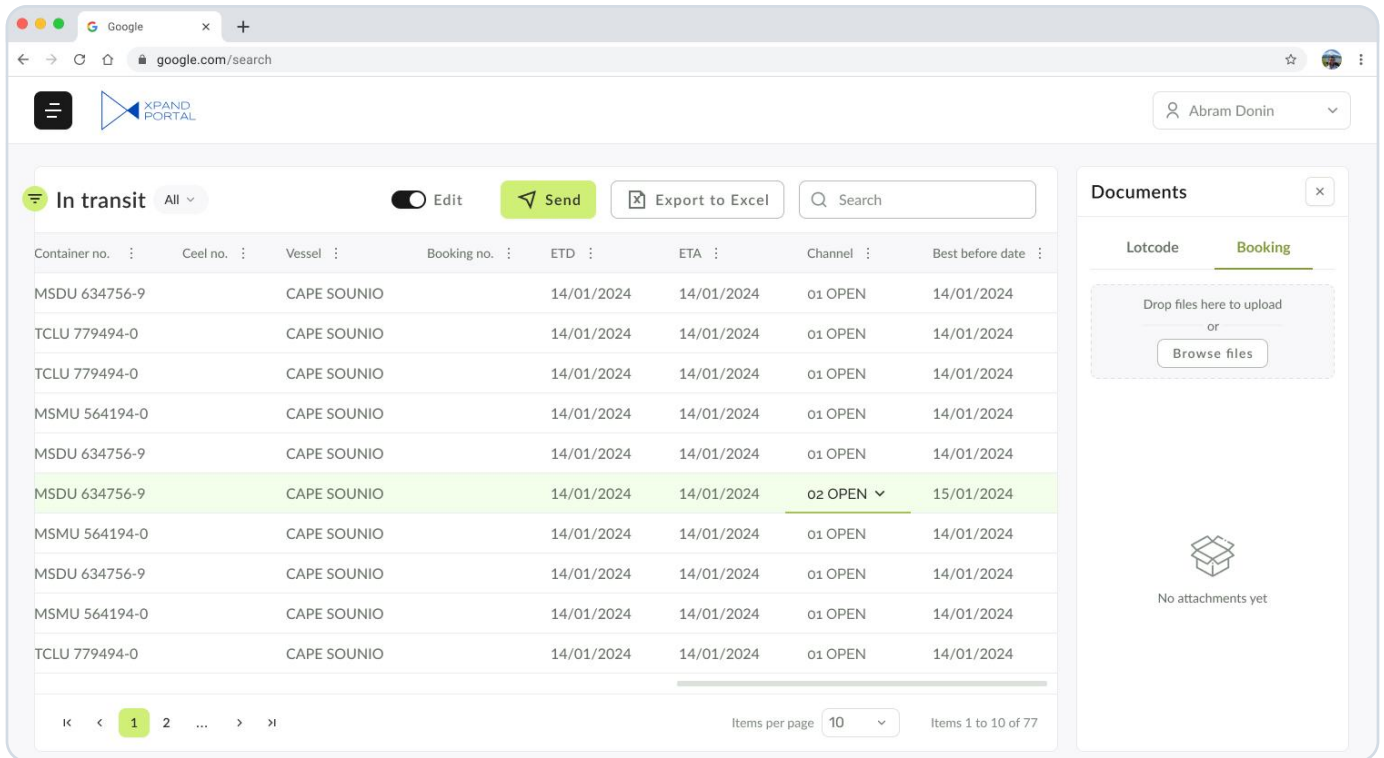


After secure sign-in with two-factor authentication, each user lands on a home dashboard with:

- Quick Access buttons to key pages (commercial stock, physical stock, deliveries).
- Charts and statistics that summarize quantities and movements relevant to their role.

This replaces static reports with a single, always-current entry point into stock and delivery information.

✓ Commercial stock with history



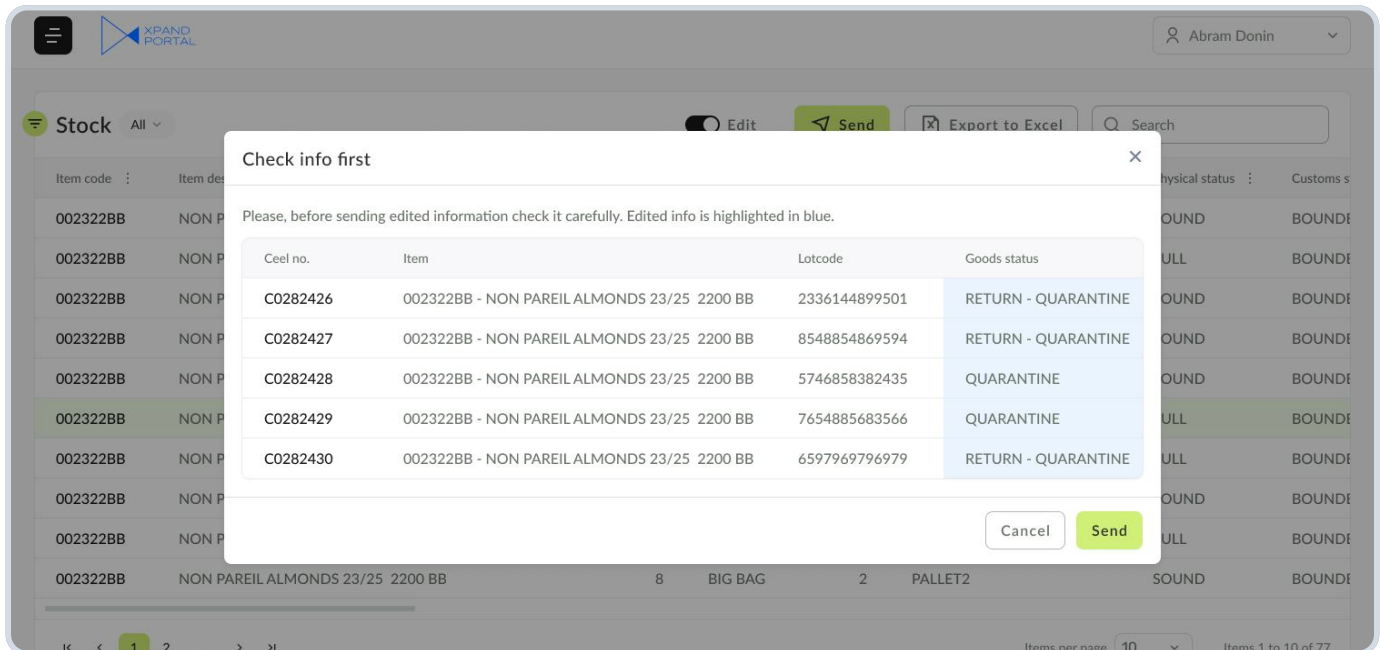
Container no.	Ceel no.	Vessel	Booking no.	ETD	ETA	Channel	Best before date
MSDU 634756-9		CAPE SOUNIO		14/01/2024	14/01/2024	01 OPEN	14/01/2024
TCLU 779494-0		CAPE SOUNIO		14/01/2024	14/01/2024	01 OPEN	14/01/2024
TCLU 779494-0		CAPE SOUNIO		14/01/2024	14/01/2024	01 OPEN	14/01/2024
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The Commercial Stock page gives customers and internal users a consolidated, read-only view of open commercial inventory:

- Data is filtered by member group and company, so each user only sees their own scope.
- Quantities are grouped with Final Indicator logic, showing only final, reliable transactions.
- Users can drill down into origins, items, and history to validate quantities and weights.

This makes it clear which quantities are available, reserved, or final, and reduces back-and-forth questions to the sales or operations team.

✓ Physical stock per pallet



To align commercial figures with reality in the warehouse, the portal provides a Physical Stock per Pallet view:

- A similar user experience to Commercial Stock, but focused on pallet-level inventory.
- History and movement tracking for pallets to support planning and reconciliation.

This helps both the client and their customers understand what is physically on hand and where it is in the process.

✓ Delivery visibility – expected and confirmed

The Portal also centralizes information about deliveries:

- Delivery List (Confirmed) – shows posted confirmations grouped by order and confirmation level, so users can see what has been confirmed and is on its way.
- Delivery List Expected (Advised) – a forward-looking view of advised outbound orders with expected delivery and inbound confirmation dates.

Together, these views replace spreadsheets and ad hoc tracking with one place to check both expected and completed deliveries.

✓ **Security, governance, and branding**

Because the portal exposes business-critical data to external users, security and governance are embedded by design:

- Role-based access control and member groups ensure each customer only sees their own companies and transactions.
- Two-factor authentication protects every login.
- The solution is delivered as a branded web experience with the client's logo, theme, English UI, and standardized formats, making it a natural extension of their service offering.

Under the hood, Xpand Portal connects to Business Central via Xpand Portal Connector, synchronizing stock and delivery data while remaining configurable and extendable. As processes evolve, new pages, grids, or calculations can be added without rebuilding the solution from scratch.

Solution

By moving from scattered spreadsheets to a single, secure customer portal, the company achieved:

- Real-time visibility into commercial and physical stock for both internal teams and customers
- Faster decisions, as customers self-serve information instead of waiting for manual updates
- Fewer errors and disputes, thanks to one shared, trusted data source
- Reduced reporting workload for operations and support teams
- Stronger customer relationships, built on transparency and a professional digital experience

In short: Customer Portal turned complex logistics data into a clear, self-service experience, so everyone in the supply chain can act with confidence.