

Seamless transportation tracking and management with Xpand Portal



Problem

The company is an international freight forwarder, providing transportation services from point A to point B at the client's request. The company facilitates the entire process, i.e., contacting carriers, booking berths on the ship, and ordering services from transportation companies. However, due to the large number of third parties involved in the process, facilitation of a timely document exchange, as well as alerting and reminding the parties about important milestones required a lot of resources and time, which could have been saved.

When the client first reached out to Xpand, they already had a website, but they felt that it didn't meet their needs. Although the project had taken a year to develop, which is a reasonable amount of time for such a solution, it didn't match their expectations in terms of flexibility, ease of customization, and adaptability. They found that making even small changes to the site was a slow and difficult process, and they had to rely on the original developer to make any updates. This lack of control was a challenge for them. At the same time, the previous portal

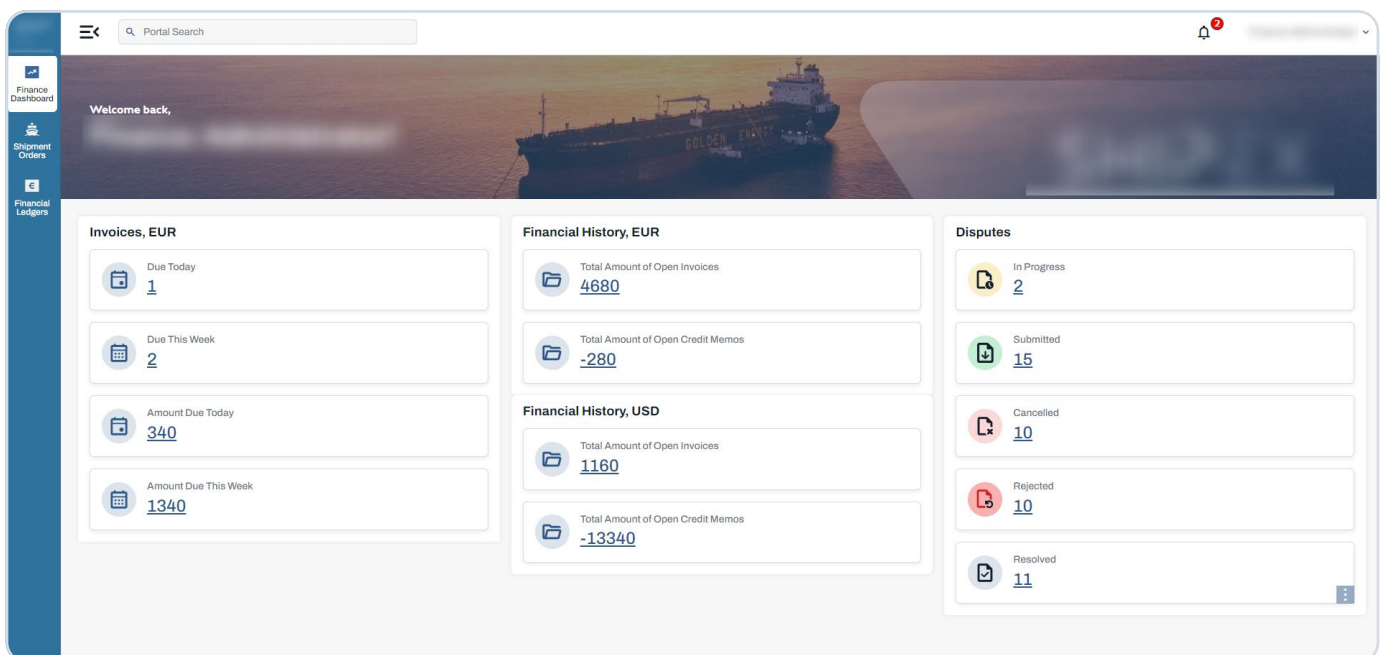
wasn't challenge for them. At the same time, the previous portal wasn't user-friendly for mobile devices, despite the majority of users preferring to exchange information via their mobile devices rather than desktops.

Intro before solution

Xpand Portal is a great solution for companies with constantly evolving processes that they want to have immediately reflected on their customers' portals. This is enabled by a configurable integration with Business Central and configurable portal pages, which can be extended at any point in time when the company needs them. By utilizing our pre-existing frameworks, we can save time and resources that would be spent on developing pages from scratch, while ensuring that our product is thoroughly tested and is reliable. The Xpand Portal's internal structure and content allowed for a faster and superior solution, while also enabling the client to have more control over their website.

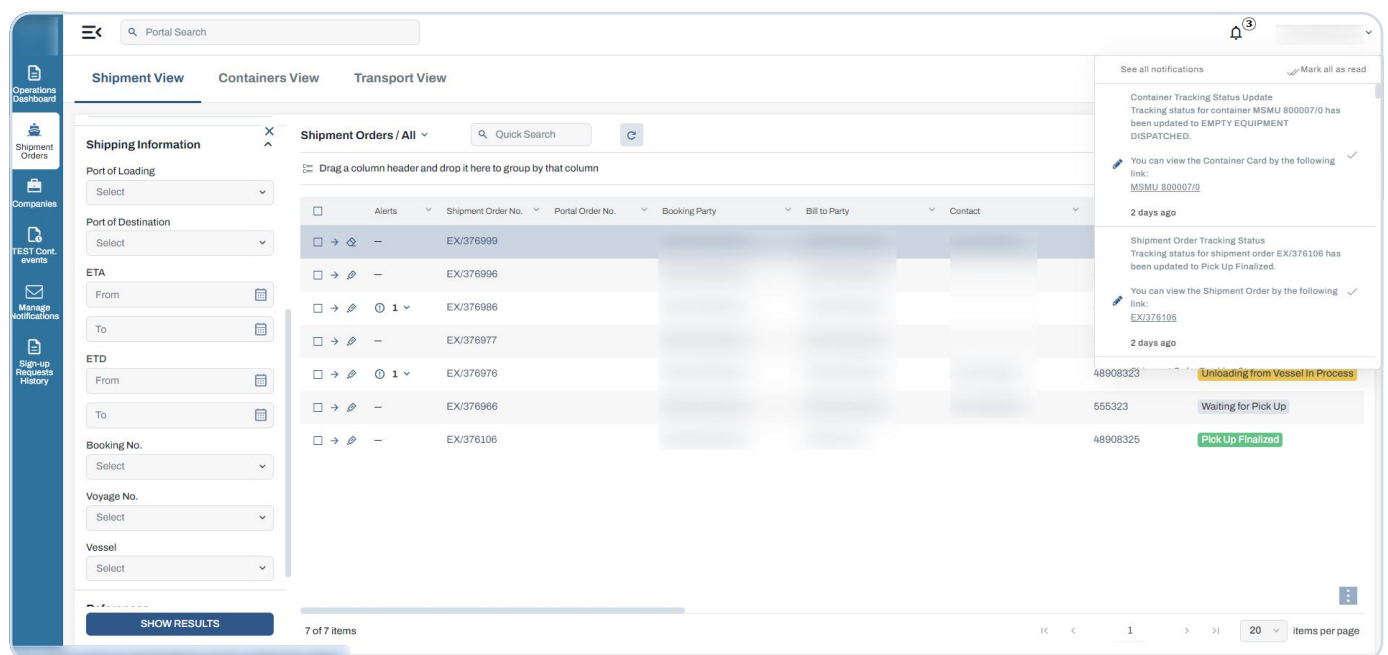
Solution

The client's primary requirement was to share the tracking information about their client's cargo shipments between point A and point B while ensuring seamless communication and timely document exchange between involved parties.

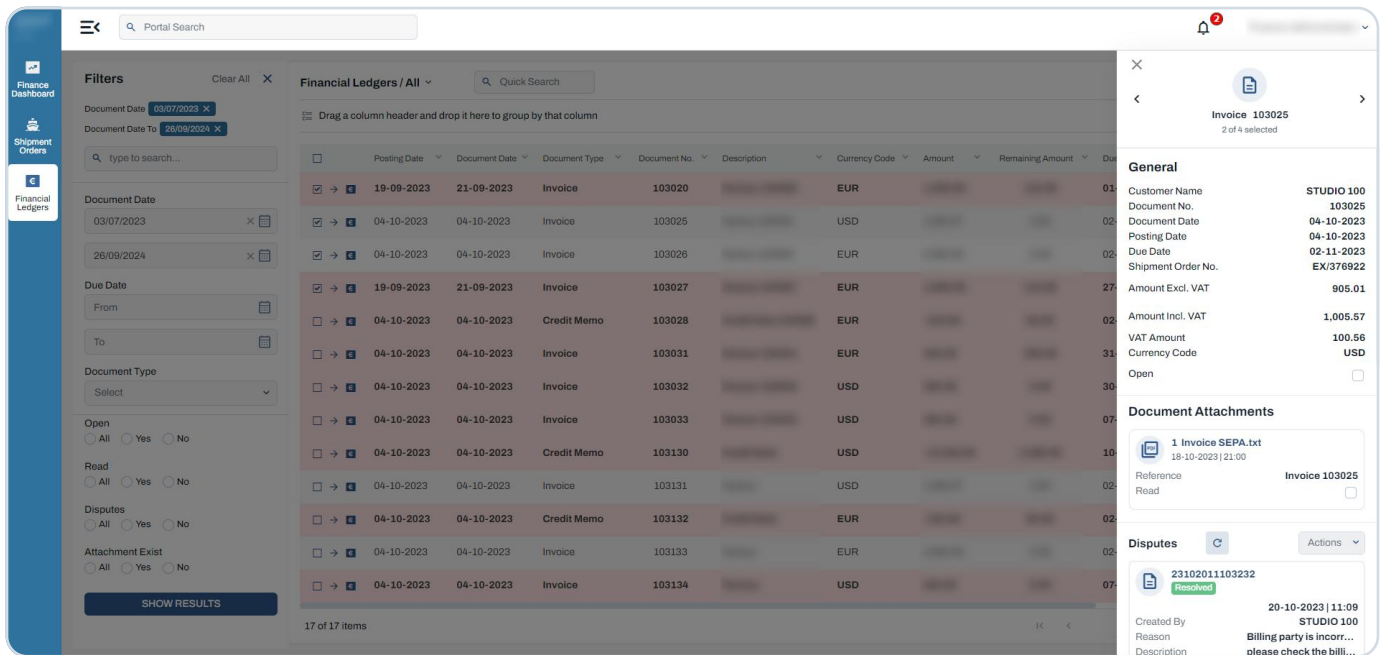


To address these requirements, Xpand Portal was implemented to provide all process participants with access to relevant transportation information in a user-friendly way, keeping users' focus on the right information. After logging in to the portal, each customer landed on a dashboard providing quick access to key information, KPIs, and alerts relevant to their particular role.

Along with the dashboard, the portal provided access to information about shipment orders with details about departure, delivery, intermediary addresses, involved parties, container information, and the status of the handling or shipment.



To enhance user experience, a world map was added to the shipment order to show the product's location in real time through the portal. Visual diagrams were also added to aid in data visualization. The order's contents could be expanded to get a list of transported containers, and information on added and expected documents, such as BLs, AWBs, FCRs, CRMs, invoices, and by whom they were added. Reminders were also added to prompt users of specific tasks relevant to their roles in the transportation process, such as approving, sending a document, or specifying the weight of a container. These notifications were also duplicated by email.



To avoid the necessity for the accounting department to send emails with invoices, the portal was extended with a financial module. Thus, generated invoices and payment dates were synchronized with the portal at the moment of their placement in Business Central. As a result, the client was able to access a consolidated financial history and payment statuses without contacting the accounting department.

Xpand Portal was integrated with the client's Microsoft Dynamics 365 Business Central, using the configurable tool [Xpand Portal Connector](#). A shipment order created on the portal was synchronized to Business Central, while invoices, transportation statuses, as well as relevant documents could be easily accessed through Xpand Portal. The portal provided the desired flexibility, as it was customized to meet the client's needs, with the primary function being easy to update the configuration by users without the need for developers or IT specialists.