



## Summary

When distributing product globally, it is paramount to effectively track shipments and associated costs. For a client of ours, who sourced and manufactured product internationally for sale in local markets, specifically tracking containers was critical to their business success.

A legacy solution was ineffective at providing the visibility and detail required to ensure operational excellence. With Dynamics 365 Business Central, Corterra Solutions built a solution to track, report, disposition container movements globally through various technologies. Read more about how we did it below.



**CORTERRA**  
SOLUTIONS

## Effective Container Management and Streamlining Logistics Through Microsoft Dynamics 365 Business Central

**Industry:**

**Logistics**

**Revenue:**

**50 million**

**Solutions:**

**Microsoft Dynamics 365 Business Central**

## Challenge

In the fast-paced world of supply chain management and logistics, the ability to adapt and scale operations efficiently is critical for business success. Our client, a prominent manufacturer with a global supply chain, was confronted with challenges pertaining to their use of Epicor. The existing solution was unable to scale and faced difficulties integrating with Electronic Data Interchange (EDI) platforms or third-party freight tracking and estimation services like [www.searates.com](http://www.searates.com).

The primary problem was the Epicor solution, which became a constraint for the company due to its limited scalability and integration capabilities. With increasing freight and import costs, the lack of easy querying and analysis of container and voyage information impeded insightful decision-making. The goal was to create a seamless, integrated “Container Management” system within Microsoft Dynamics 365 Business Central (BC) that would not only facilitate a better data entry process but would also utilize Business Central’s EDI and third-party integration capabilities.

# Objective

The client aimed to develop a Container Management solution that met the following criteria:

1. Leverage Business Central's robust reporting and search functions, including Power BI connectivity, to facilitate in-depth analysis of voyage information to provide actionable insights for managing increasing freight and container costs.
2. Track and manage Purchase Order Lines, Containers, and Bills of Lading effectively.
3. Establish a central repository for document management related to container imports.
4. Accurately track finished goods inventory costs and estimate additional landed costs.

# Features

To meet these objectives, a Container Management solution was engineered within Business Central with the following features:



## Purchase Order & Container Association:

The creation of a system that permits the allocation of Purchase Order Lines to specific Containers and Bills of Lading. This enables precise tracking and auditing of goods from purchase to delivery. Direct posting of Purchase Order Receipts from a Container enhances efficiency in inventory management.

Container No.	Purchase Order No.	Purchase Order Line No.	Line Type	Item	Description	Location Code	Load Type	Qty on Container	Qty on Purchase Order Line
	UPO001775	10000	Item			DI-ONSHP	Pallet	108.00	108.0
	UPO001775	20000	Item			DI-ONSHP	Pallet	96.00	96.0
	UPO001775	30000	Item			DI-ONSHP	Pallet	16.00	16.0
	UPO001775	40000	Item			DI-ONSHP	Pallet	40.00	40.0



## Visual Aid Integration:

Reference to images within the integrated document indicated visual aids such as diagrams or screenshots, which supported user understanding and operational efficiency.



## Information Tracking:

Key container data elements like size, seal number, and Bill of Lading details were made trackable within the system. Voyage and transportation data management capabilities were improved by incorporating vessel name, voyage number, freight forwarder, carrier, broker, and Incoterms. Port and entry data could now be maintained meticulously, covering both origin and destination ports, and respective timelines.



## Central Repository:

A robust digital infrastructure to archive all documents was established, relating to the container import process. This repository encompassed Purchase Orders, various types of invoices, packing lists, and certificates of origin.



## Enhanced Purchase Order Management:

The solution provided the capability to merge multiple Purchase Orders into a single container. Purchase Order lines could be effortlessly allocated to containers, and receipts posted directly from the Container Management module.

General

State	Posted for Receipt	Vessel Name	951	Seal No.	
Status		Voyage No.		Rollover	<input type="checkbox"/>
Container No.		Forwarder		Comments	
Container Type		Incoterms		Purchase Orders	
Bill Of Lading No.		Ship Via		Sales Orders	
Bill Of Lading Date		Carrier			
House BOL No.		ASN No.			

Port and Entry

Factory Ready Date	ETA Port	Declared Value	25,328.84
ETD Port	Confirmed Port Arriv...	Broker	
Port Of Origin No.	Est. Port Last Free Da...	Import Entry No.	
Port of Origin Name	Last Free Date at Port	Import Entry Date	
Destination Port No.	Total Net Weight		9,568.64
Destination Port Na...	Total Volume		60.72

Rail and Delivery

Rail Ramp No.	Customer Name	Do Not Deliver After	
Rail Ramp Name	Ship To City	Confirmed Customer...	
ETA Ramp Arrival	Ship-To State	Empty Returns Last F...	
Confirmed Rail Ram...	ETA Delivery	Empty Returned Date	
Pickup No.	Do Not Deliver Before	Cross Dock	<input type="checkbox"/>



## Results

By deploying Corterra Solutions' Container Management solution in Business Central, the client was able to:

- **Achieve** a scalable and thoroughly integrated system for container management.
- **Reduce** the time expenditure on data entry and increase the accuracy of logistics tracking saving over 500 hours a year of manual analysis.
- **Realize** cost savings through analyzing voyage information and costs with greater precision, ultimately aiding in cost control and budgeting.
- **Centralize** documentation, simplifying compliance, access, and auditing.
- **Increased** accuracy for estimated landed costs with exceptional precision, leading to more informed financial planning.

## Conclusion

The innovative Container Management solution delivered operational excellence, cost savings, and enhanced supply chain visibility for the client. By integrating the latest advancements in Business Central, the client now operates with a forward-thinking, scalable approach to logistics and container management, setting a new benchmark for efficiency in their industry segment.

### ABOUT CORTERRA SOLUTIONS

Corterra Solutions offers IT infrastructure, ERP implementation, cloud migration, cybersecurity, and analytics services that help medium and large clients operate and grow their businesses securely, efficiently, and intelligently. As a Microsoft Partner, Corterra has extensive experience with Microsoft technologies, including Dynamics 365. Our deep partnerships with clients, coupled with our reputation for outstanding service, give clients freedom to focus on meaningful work that drives their companies' success. For more information, please visit [www.corterrasolutions.com](http://www.corterrasolutions.com).