

KUEBIX ERP INTEGRATION

with Microsoft Dynamics



Integrating Microsoft Dynamics with Kuebix TMS

Companies who wish to connect their ERP with their TMS (transportation management system) can now do so with a packaged product integration between Kuebix and Microsoft Dynamics.

By integrating Microsoft Dynamics and Kuebix TMS, users can automatically integrate their orders and financials to their logistics systems and streamline their shipping processes, cut down on human error, and position themselves to improve their customer experience.

ERP integrations can help users achieve 100% shipment accuracy by avoiding manual entry, reduce time related to keying in orders, and leverage actionable analytics such as SKU-level freight costs.

Kuebix works side-by-side with users to ensure that the TMS isn't only a single tool, but a complete transportation operations solution that connects to the central business systems of the company.



Benefits of Integrating

- Streamlined processes
- Shipping automation
- Reduced human error
- Improved visibility to all orders
- Rapid ROI and cost-avoidance

The Kuebix Advantage

- A true cloud-to-cloud technology
- Multi-modal platform
- Easy to use and quick to implement
- Competitive, fair pricing
- Customer centric approach

How Integrating with Kuebix Works:



1

Kuebix leverages a common middleware connector that maps ERP order and item information and automatically creates orders within the technology.

2

These orders are stored in Kuebix in preparation for shipping departments to simply scan or enter the order number into a lookup field to get rates and begin shipping.

3

Once the order is shipped, Kuebix notifies the ERP system and updates the ERP order with shipment details. (Tracking number, cost, carrier, time in transit, GL code, etc...)

4

Each ERP connector includes a configurable trigger function to automatically create orders, status changes or approval processes to tell Kuebix to pull the order details. This process allows for a seamless flow of data between the two systems.

5

Once shipped in Kuebix, shipment details are mapped back to the target ERP system for accurate record keeping and visibility for all stakeholders.

To Learn More About Integrating Kuebix TMS with Microsoft Dynamics, visit go.kuebix.com/microsoftdynamics



Today's Transportation Management System

PLATFORM FOR GREATER FREIGHT SAVINGS

Logistics professionals are struggling with the high cost of legacy transportation management systems (TMS) and their time-consuming implementations. Kuebix solves this by offering a modular, scalable and intuitive TMS platform that supports all modes of transportation. Users can rapidly connect parcel, LTL, full truckload, rail, ocean and air carriers on the Kuebix platform. And since it's built on the latest cloud technology, Kuebix can seamlessly scale as your company's needs become more complex.

Our software connects customers, suppliers and carriers using one platform, giving them complete visibility and control of their shipping operations. Kuebix allows companies to compare all their rates side-by-side and choose the best carrier for each shipment, leading to substantial cost savings and better customer service. After selecting a rate, Kuebix streamlines the entire shipping process including creating and printing BOLs, tracking and tracing shipments, managing the cost of shipping down to the SKU level, automating invoice audit, exception management and much more. With robust analytics and unique Carrier Relationship Management tools built into Kuebix TMS, shippers are empowered to make better shipping decisions and turn their operation into a profit center.

THE KUEBIX ADVANTAGE

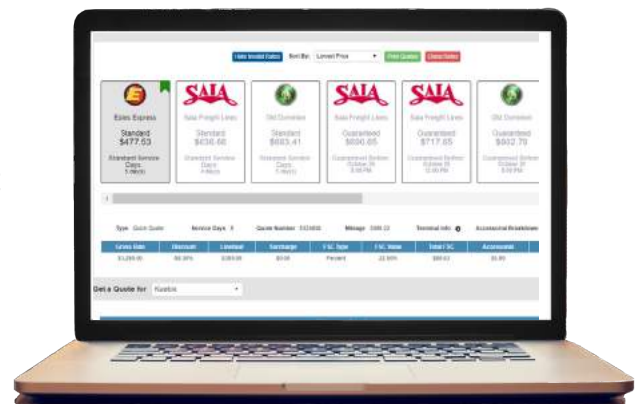
- Modular cloud-based software using a single code base - scaling to meet the changing needs of any size supply chain
- All modes of transportation in a single system
- In production fast - complete implementations measured in weeks and months rather than quarters and years
- Collaboration with supply chain stakeholders through powerful portals
- Actionable analytics that help you make smarter shipping decisions and hold your carriers and suppliers accountable
- Seamless integrations with any internal or 3rd party system (ERP, warehouse management, etc.)

KEY FEATURES

Negotiated Rates - Automatically connect all your carriers, for any mode, with Kuebix. This enables you to view and compare rates side-by-side to choose the best rate and service level for each shipment, saving time and money in the process.

Spot Service - Reduce freight costs by requesting spot quotes for volume freight using the Kuebix Community Load Match service, which leverages the power and size of the Kuebix shipping community to get the best rates for your volume freight.

Book - Strengthen your carrier relationships by booking with them directly through your Kuebix account. Once your carriers are connected, you can book freight in the time it takes to book a flight online without the need for any back-and-forth between you and the carrier.



KEY FEATURES

Reports and Analytics - Our TMS generates actionable reports and dashboards that help you understand every detail of what you are spending on freight. Carrier scorecards, financial analytics and shipment trends help you manage your carrier relationships more effectively and ensure you can make smarter shipping decisions. These analytics help you to strategically position your company for decreased spend and increased service levels.

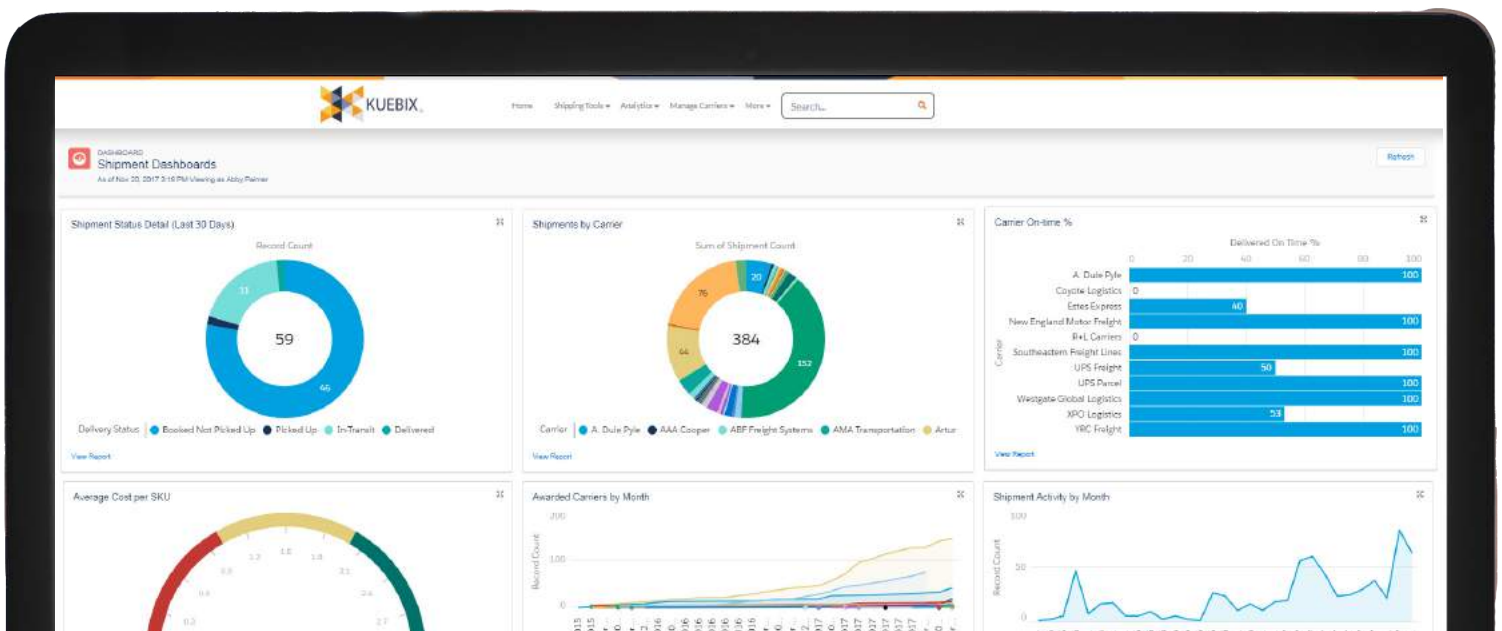
Invoice Audit - Carrier invoices are automatically audited against the approved rate quote for each shipment and mismatches automatically have rate exception claims created for them. This means you only spend time looking at the invoices that are incorrect, and all correct invoices are automatically approved and set for remittance.

Rate Exception Management - Rate exception claims automatically show each discrepancy on the invoice, such as an unexpected lift gate fee or an incorrect detention charge. By having immediate visibility to every discrepancy, it is easy to dispute invoices with your carriers. Once you have determined the amount you want to pay, you can choose to automatically deduct the exception from the invoice or approve it for processing. Your ERP is automatically updated with the new invoice information and ready for payment based on your terms.

Financial Management - Kuebix allows users to add important GL codes to invoices for every line item as well as keeps track of the payment's terms with your carriers and helps your ERP system pay your carrier invoices on time. These two financial functions help the company keep track of specific expenses and ensure that cash flow isn't impeded by paying bills too early.

Prepay and Add - Kuebix's prepay and add functionality enables logistics professionals to add a percentage or flat rate upcharge to their negotiated carrier rates. These additional fees help to cover costs such as shipping, handling and unforeseen accessories, positively impacting the bottom line.

Carrier Relationship Management - Track all daily tasks, interactions and schedules with the carriers in your supply chain. Powerful analytics empower you to easily assess carrier performance and hold your carriers accountable to top-tier service levels.





The Power of Supply Chain Visibility

Most companies today are struggling to achieve visibility and control over their supply chains to effectively manage their cost of goods and consistently meet customer expectations.

However, there is a way to leverage technology to provide a platform where suppliers, carriers, and their customers are not only sharing information but also dynamically planning and executing their logistics operations collaboratively.

The key to supply chain visibility is a common system that all stakeholders can use to plan their moves, be alerted to changes as they occur, and make real-time adjustments to keep the supply chain moving smoothly.

How Should It All Work?

The backbone of visibility and active cooperation is a cloud-based collaboration portal that can be shared by the customer, the supplier, and carrier partners. This portal can be accessed on all computers and mobile devices wherever the stakeholders may be. This single platform will be used as a dynamic record of truth for the changes that need to occur across the supply chain to keep the delivery of goods moving efficiently.

Here are three supply chain benefits of cloud collaboration portals:

1. Order Visibility

It all begins with the purchase order for goods. In the collaboration portal, suppliers can view the full backlog of orders they need to fill. This will provide the supplier the information they need to plan production and inventory schedules to meet customer demand. Here the supplier can commit to promise dates so that the customer can plan their business based on delivery dates and product availability. As changes occur, the supplier can keep their customer updated so they can plan accordingly.

2. Carrier Visibility and Collaboration

Once the order has been booked, the carrier needs to participate in the collaboration portal and begin to provide status updates on their delivery. Many carriers have the ability to provide electronic notifications through various protocols including EDI or web services driven from GPS or ELD based applications on the smart phones of their drivers or in their trucks. Electronic tracking provides visibility to the customer and supplier on the true status of their orders. The

next step in collaboration is using the customer's online dock scheduling system to reserve a time and door for the delivery.

This approach ensures that trucks are not waiting for hours for a door to become free, resulting in better carrier performance and costs over time.

3. Customers Gain Control of Warehouse Operations

With suppliers and carriers providing immediate electronic notification of promise dates, delivery statuses, and arrival statuses, the customer can regain control of a previously chaotic operation. Even when changes are occurring rapidly, the customer will know their shipments are in transit and can rest assured that their distribution centers and warehouses will run smoothly. Carriers will show up at the right location on time or a notification will be sent so corrective action can be taken. This allows the warehouse operations team to manage their staff effectively to have the right number of workers available to handle deliveries as they arrive, rather than having groups of people sitting idly because they were not aware of a delivery delay. All of this results in superior inventory management and having the warehouse operations team meet the expectations of their customers.

Tangible Savings from Supply Chain Collaboration and Visibility

Suppliers and carriers working together on a common technology platform will not only create efficiencies for the customer, they will increase their ability to deliver superior customer service. A carrier that arrives on time to the right location can unload quickly and get to their next delivery on time. A supplier with visibility to all of their orders can plan more effectively and maintain their level of customer service. A customer that has visibility to all the dynamic changes that occur during shipment planning and delivery can have an efficient distribution center that will increase inventory turns and reduce their cost of goods.

Download the full Kuebix ebook "Driving Supplier, Carrier and Customer Collaboration" (<http://bit.ly/2jj1Jkg>).

Founded by a logistics industry innovator, Kuebix offers a transportation management system (TMS) with Freight Intelligence that enables companies to capitalize on supply chain opportunities through visibility, control and the use of predictive analytics. Learn more about Kuebix at <http://www.kuebix.com>.



THE COMPLETE BUYER'S GUIDE to Transportation Management Systems

The 12 Must-Ask Questions
You Need Answered First



INTRODUCTION

What if you could have full control and visibility into all the logistics-related data of your supply chain? Together, control and visibility can give users the power to define, manage and evolve their supply chains, allowing them to cash in on revenue opportunities and be flexible enough to meet ever-changing business and economic needs.

With the right transportation management system (TMS), you can get that level of power along with the ability to automate and streamline manpower, time- and resource-consuming tasks such as finding the best rates, monitoring shipping statuses and managing inbound and outbound shipping schedules. And with the power of predictive analytics at your fingertips, you could take action to dramatically reduce your freight costs and make better decisions faster.

A TMS can be the solution for all supply chains from the simple to the complex. It has become an essential tool for managing the many challenges that come with shipping freight. The right TMS must integrate with your existing ERP system and offer valuable insights into tangible ways to reduce your freight spend, improve your customer service and reduce your cost of goods.

THERE IS ALMOST NO LIMIT TO HOW A TMS CAN BENEFIT YOUR UNIQUE SUPPLY CHAIN.

But the key to success is finding the right one for your goals. So, before selecting a TMS, use the 12 questions in this buyer's guide to find the best solution for your company.

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01

Why Do You Need a TMS?

Before exploring the many TMS options that are available, you should determine exactly why you need one.

For example, think about your goals and what you're hoping to achieve with a TMS.

Is your company a small- to medium-sized business looking for an alternative to the manual processes of finding carrier rates, booking and tracking shipments? Or does your enterprise-sized company have a more complex supply chain that could be streamlined and made more flexible with premier applications and integrations? Do you ship enough so that the integration of your ERP systems to your TMS will save you time and reduce errors?

Do you need to address specific tasks such as order consolidation and optimization, yard and dock scheduling, a tool to create RFPs for your carriers or a way to manage your inbound as well as your outbound?

Once you've determined your current situation, you'll be able to make the most informed decision possible.



02

What Are the Critical Functions and Benefits of Using a TMS?

A TMS enables you to automatically rate, book and track shipments, manage carriers and communicate with shippers and customers in real-time. On top of these benefits, a TMS should be able to solve other challenges by:

- ✓ Offering a large carrier pool with more options to help you find the right carrier at the right price and service level.
- ✓ Consolidating and optimizing shipments for cost-effectiveness.
- ✓ Ensuring accuracy and time savings with efficient system-to-system communication.
- ✓ Informing you and your customers of shipping statuses.
- ✓ Automatically documenting and auditing invoices, handling claims and exceptions.
- ✓ Instituting pre-paid and added function to customer billing to avoid losing money.
- ✓ Incorporating all shipping options (parcel, LTL, TL, rail, etc.) and modes on one platform.
- ✓ Creating easy-to-read reports and dashboards that keep track of the cost and service level of every shipment.
- ✓ Managing the RFP process with carriers to efficiently set up the best rates and service levels to tender shipments more effectively.

A TMS that offers full analytics can also tell you what you're doing well and where you could optimize your efforts by giving you full visibility into your supply chain.

03

Are Demos or Free Versions Available?

If you're running a small supply chain, a free demonstration or version of the product will be essential before committing to a platform. Since it's unlikely that a small supply chain needs to start out with full integration capabilities and more complex applications, demonstrations and free versions must require little time to set up.

Demonstrations provide a first-hand tutorial from the experts, which will give you full insight into how the system works. If the TMS offers a free version of the system, that could be of a far greater benefit because free versions allow you to use the system in real-time and see real results incorporated into your everyday operations.

For those with enterprise-level supply chains, integrations are almost always necessary, meaning extensive time and resources are required to set up a customized TMS. As a result, a free version and demonstration that is fully tailored to your needs is often hard to facilitate. However, some TMS platforms offer one-day demonstrations that are customized to the way you work, showing you the full life cycle of an order in a sandbox testing environment. The TMS will need some of your actual order data to set up this demo, and will then simulate integrations to give you a feel for the system.



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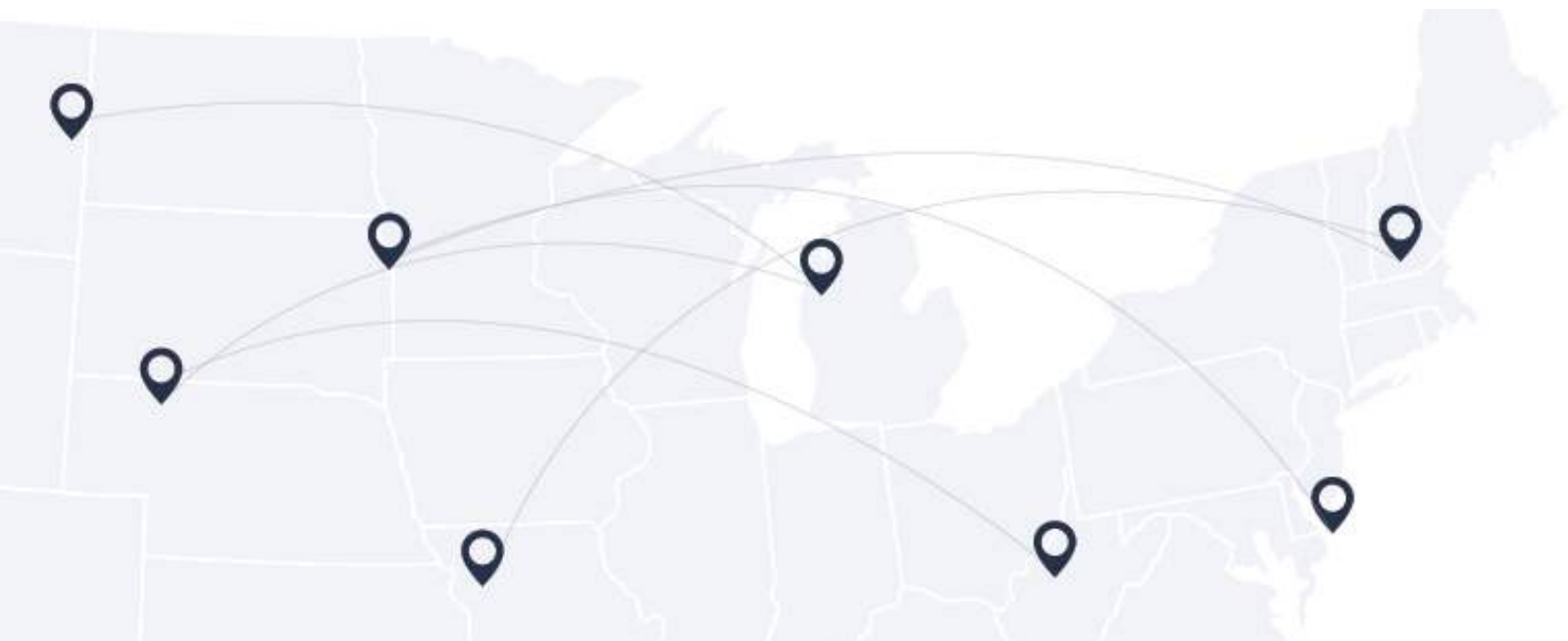
Does the TMS Offer a Full Carrier Network?

A solid TMS should allow you to join an inclusive, online logistics community that enables you to use the negotiated rates with your current carriers and leverage a full set of additional carriers for parcel, LTL and truckload shipments.

The community should provide a single online location through which you can communicate and collaborate with your carriers through portals that can help you manage exceptions and changes as they occur.

You should also check to see if the TMS you're considering offers spot ratings with carriers outside of your network so that you can find the best rates and service levels for specific shipments.

The TMS should provide an out-of-the-box web services integration that is included at no additional charge, and an EDI integration where necessary.



05

Does the TMS Vendor Understand Your Industry?

Freight shipping is full of challenges. Orders get changed or cancelled. Freight is damaged. Unexpected assessorial charges can appear. Shipments can get delayed.

Because of this, a TMS needs to be backed by freight experts first and foremost. Then it should be surrounded by skillful technologists who understand the platform inside and out. Together, the freight experts and technologists should speak the language of freight shipping and understand shippers' pain points.

When looking at a TMS, ask this question: Is the TMS run by freight experts who hired technologists, or technologists who are just learning about freight? Because at the end of the day, you'll want a system that can speak your language.

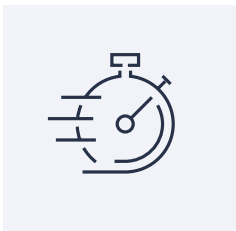
Dive a bit deeper and check out vendors' customer and focused industries list. If your vertical isn't mentioned or customers don't include anyone in your vertical, the TMS provider may not have a solid understanding of specific challenges you face. Many of the providers actually cater to 3PLs and brokers that have not specialized in solving shipper problems. If all the customers are in one or two industries – and not yours – look for a TMS provider with broader experience.



06

How Long Does it Take to Get Started with the TMS?

The level of sophistication of the TMS you need will be the deciding factor in how long it takes to set up.



If you're running a simple supply chain that doesn't require any integrations, a TMS can get up and running quickly – **often in a matter of minutes**. From there, you're able to upload your negotiated rates with your carriers and get started shipping immediately.

Make sure that your TMS vendor has web service integrations so you can onboard your major carriers. EDI integration to carriers that do not support web services is essential. Some vendors do not support EDI which can be very limiting, while others use a third party for the web service integration and you will find additional charges to connect to your brokers. All of this should be tested in a trial or free version of the software.

If your supply chain is complex and you're processing many orders per day, you will need your ERP system to talk to the TMS so that orders do not need to be entered twice. You will need IT to coordinate the setup with your TMS vendor. You may also want invoice information integrated back into your ERP system to keep track of the life cycle of the financials of an order. Make sure that your TMS vendor has experience with your ERP supplier or at least a solid framework for getting this done.

Plan on 30 to 60 days to get your system set up and running if there are several integrations required. Many on-site systems require up to nine months to over a year for implementation, which can cost more than the yearly cost of the software subscriptions. These products have old architectures and should be avoided.

07

How Much Will the TMS Cost?

The cost for every TMS in the industry is going to vary. But when considering the right TMS for your business, you should measure the total cost of ownership (TCO) of each option.

An on-premise solution will have a high TCO because it involves a hardware-based system that needs to be implemented, configured and supported. This typically requires several people to install equipment and handle maintenance and updates. Plus, the vendor often requires a multi-year contract covering the equipment before you even realize its benefits.

By comparison, a cloud-based solution has a much lower TCO and can be up and running in a matter of minutes or days, depending on the complexity of your supply chain.

Since everything is stored in the cloud, no staff is required to maintain the hardware and updates are installed automatically. In contrast, cloud-based TMS platforms are priced on a month-to-month basis, or annual basis, allowing you more flexibility. Make sure that your prices are truly all specified, as many vendors charge extra for web service or EDI connections.

Additionally, it is important to investigate if the TMS vendor's system is modular. If it is, you only need to pay for what you need and can add more sophisticated functionality as required. Many of the larger vendors have older architectures and force you to buy their full-blown system at the outset, which can be very expensive. The cost to onboard carriers and implement the TMS should be about 20% of the cost of the software. Potential customers should carefully analyze implementation time and cost.

08

How Well Does the TMS Integrate with Your Other Systems?

The TMS you implement should offer integration options for third-party and internal systems. Some of the most common ones include:



CARRIER INTEGRATION

Most importantly, your system must integrate with your carriers. This includes being able to rate, book and track shipments as well as enabling quick communication. With full connectivity to your carriers, your TMS should make it easy to transmit tracking statuses, financial data and other vital information. Both web services and EDI should be available at no additional charge.

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ERP SYSTEMS

Since these systems are commonly a part of a complete supply chain, your TMS needs to integrate with them to provide logistics professionals complete visibility into their operations. It should be as simple as typing in an order number to see every detail.



FINANCIAL

The TMS also needs to have the ability to feed audited items back into the ERP or financial system through a simple integration. This allows you to pay carriers through your own financial system.



APPOINTMENT SCHEDULING

Your TMS should make it easy to communicate appointment information and delivery schedules. Most importantly, the TMS should be able to tell you if a delivery will be delayed, so you can notify the customer in advance.



WAREHOUSE MANAGEMENT SYSTEM (WMS)

When an order is received and scanned into your warehouse management system (WMS), the TMS should be able to receive order information through a simple integration to facilitate shipment. The TMS should have a dock scheduling function that feeds appointment data into the WMS.



SUPPLIER INTEGRATION

Portals should be available for suppliers and carriers to communicate important issues as they arise and resolve problems.

Remember: the more integration possibilities available, the less manual operation that will be required and the more accurate your supply chain will be.

09

What is the Support System Like?

With any system, having a support team to back you up is going to add a much-needed level of comfort. But it's important to look into a TMS' offerings since every platform offers varying levels of support.

You should expect basic, free support during business hours. This typically involves communicating with the TMS company via phone or email, with your inquiry then being triaged and directed to the appropriate person.

Some TMS platforms also offer paid, higher levels of support with faster response times and additional benefits, and you may require 24/7 support. We suggest talking to several references to be sure that your potential vendor has a track record of reliable support.



10

What is the TMS Provider's Backup/Recovery Plan?

Your business will depend on a TMS for the bulk of its operations, so verifying a solid backup/recovery plan will be in your best interests regardless of the type of emergency.

An on-premise hardware system has a high chance of extended periods of downtime in the event of an emergency. It could take a full day after extreme weather for it to get back up and running, which means a full 24-hours without access to the system for you and your customers.

A cloud-based, Platform-as-a-Service (PaaS) solution offers the quickest recovery time after an emergency. This type of solution runs on the latest cloud technology which has a full staff of technologists and engineers on call and systems built for redundancy. If your TMS goes down, they can switch you over to another node within milliseconds. All you need to worry about is internet access.



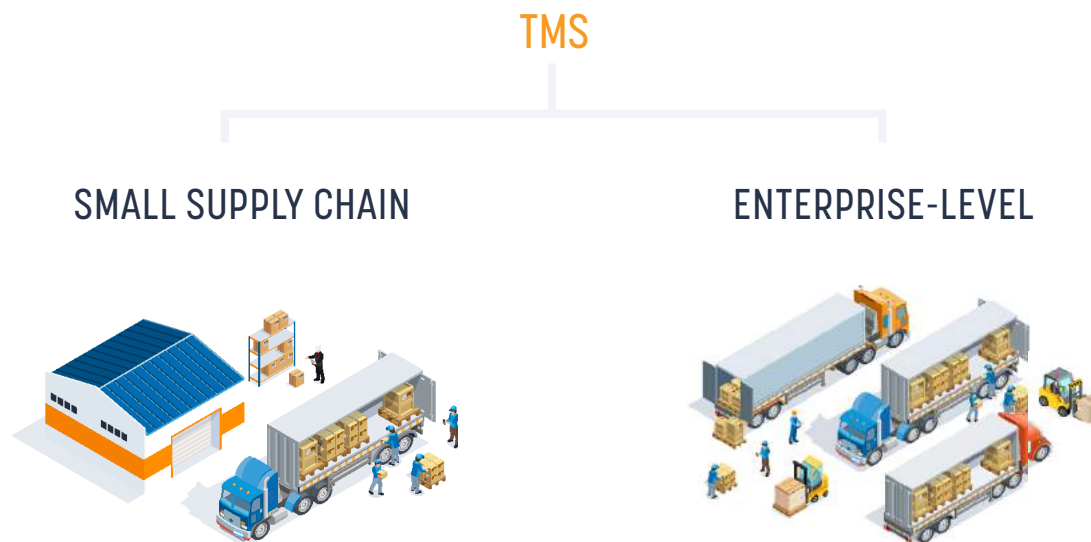
11

Can the TMS Scale with Your Business?

The functionality and flexibility of the TMS will determine whether it's able to scale with your business.

A TMS should be able to grow with you, whether you run a small supply chain or an enterprise-level system. As your business changes, it's likely that your system needs will vary.

Make sure the TMS you choose offers a full menu of application and integration options. You should also be able to bring on as many internal users as necessary. Also, a priority is the ability to integrate all of your suppliers through portals. Make sure the functionality can be purchased in a modular fashion so that you only pay for what you need.



12

Does the TMS Support All Modes of Freight?

It is important to have a single system that can handle all modes of transportation, including:

- ✓ LTL
- ✓ TL
- ✓ Parcel
- ✓ Heavy air
- ✓ Rail
- ✓ Ocean
- ✓ Intermodal

You do not want to go to several different systems to manage your freight. You will be back to using carrier web sites again and losing productivity. There may also be opportunities to consolidate from one mode of transportation to another to create savings and efficiencies. This would only be possible in a single system.

Be wary of carrier systems that favor their service if you need full transparency. Additionally, many of the lower-end systems do not support parcel or heavy air modes, which might be quite important to your business.





Conclusion

Founded by a freight industry veteran, Kuebix offers a transportation management system (TMS) that delivers freight intelligence that empowers companies to capitalize on supply chain opportunities through visibility, collaboration and predictive analytics.

Kuebix TMS is built on the latest cloud technology platform and allows clients to implement the solution very quickly with the core TMS, then seamlessly add Premier Applications and Integrations as needed. Kuebix also offers unique Managed Service Programs to businesses looking to partially or fully outsource transportation management.

For more information about Kuebix TMS, [contact us here.](#)

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