

BUSINESS CENTRAL SHIPPING CASE STUDY · EXPERIENTIAL MARKETING

Shipping cost in the quote before the shipment exists Mark-up included

How a leading experiential marketing company runs shipping estimates, mark-ups, labels and rental returns inside Microsoft Dynamics 365 Business Central with MetaShip.

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Company name withheld at their request · 5-minute read

Sales Quote

NO SHIPMENT YET

Shipping estimate

+ Mark-up

= Customer shipping charge



Illustration: the shipping charge sits in the Sales Quote before anyone creates the shipment.

THE BOTTOM LINE

Shipping now runs inside Business Central, from estimate to return



● IMPLEMENTED

Quick Shipping Estimate

MetaShip estimates shipping cost before a shipment exists, closer to the sales conversation.

ANSWERS

What will shipping cost before we ship?



● IMPLEMENTED

Dynamic Shipping Mark-up

MetaShip applies the mark-up and feeds it back into the Sales Quote automatically, not as a separate step later.

ANSWERS

How should the mark-up appear in the quote?



● IMPLEMENTED

Rental Outbound & Inbound Shipping

Rental items follow a defined round trip, out and back. Regular items ship one way, in the same workflow.

ANSWERS

What happens when rental items need to come back?

 **In development:** Freight Shipment and HAZMAT Products Shipping

STILL CREATING LABELS IN FEDEX SHIP MANAGER OR UPS WORLDSHIP?

See your shipping run inside Business Central

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THE FULL STORY

The shipping problem didn't start at the shipment

WHO THE COMPANY IS

For this company, shipping is part of the experience

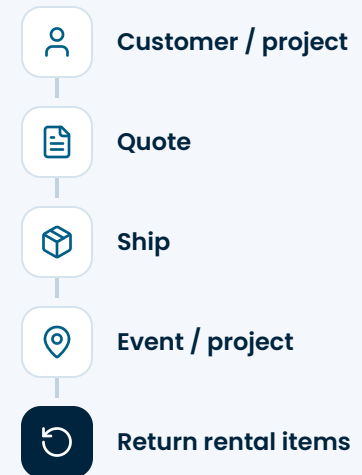
This leading experiential marketing company works in the physical corner of marketing.

It builds branded spaces and environments that companies use at trade shows, in corporate offices and in retail settings. The same team usually sees a project through, from early planning to the on-site go-live, wherever the event is.

That work is physical by nature, so exhibit shipping runs in both directions. Custom exhibit structures, fixtures, graphics and rental furnishings travel from a fabrication shop to a show floor. Many come back once the event ends.

So shipping was never a back-office afterthought. It was tied to the sales conversation, the project timeline and the customer relationship long before anyone created a shipment.

WHERE SHIPPING TOUCHES THE WORK



One engagement. Shipping touches nearly every stage of it.

The company wasn't looking for shipping software in isolation. It needed every shipping step to happen inside Business Central, the way the business already worked.

— THE OPERATIONAL REALITY

The shipment was only one part of the problem



The biggest time sink: labels outside Business Central

- Labels were created in separate tools: **FedEx Ship Manager**, **UPS WorldShip** or the carriers' own websites.
- Each label meant switching systems and keying in order details that already lived in Business Central.
- If your team ships thousands of orders a day this way, those minutes turn into hours.

Four more questions kept coming up before, during and after shipping. Each one sat at a different point in the company's event logistics workflow.

01



What will shipping cost before we ship?

The company needed a shipping cost estimate before a shipment existed: earlier in the sales process, not after the fact.

02



How should the mark-up appear in the quote?

Estimates had to carry the correct mark-up when the team prepared the Sales Quote, calculated dynamically rather than by hand.

03



What happens when regular and rental items travel together?

Outbound shipments often mixed Regular Items with Rental Items. The workflow had to handle both within a single shipment.

04



What happens when rental items need to come back?

Rentals added a return leg: Outbound Shipment → Rental Item → Inbound Return. The process had to work in both directions.

WHERE METASHIP ENTERS THE STORY

Connecting the pieces with MetaShip

MetaShip is MetaOption's Business Central shipping solution: shipping management software that runs inside Microsoft Dynamics 365 Business Central. It came in only after MetaOption understood the company's requirements.



● IMPLEMENTED

Quick Shipping Estimate

Shipping cost is estimated before a shipment is created, so it reaches the sales conversation earlier.



● IMPLEMENTED

Dynamic Shipping Mark-up

The mark-up comes into the quoting workflow and reflects back into the Sales Quote, instead of a separate calculation after the fact.

Shipping estimate + Mark-up =

Customer shipping charge



● IMPLEMENTED

Rental Outbound & Inbound Shipping

Covers each rental item's full lifecycle, from the first outbound move through to its return.



● IN DEVELOPMENT

Freight and HAZMAT shipping

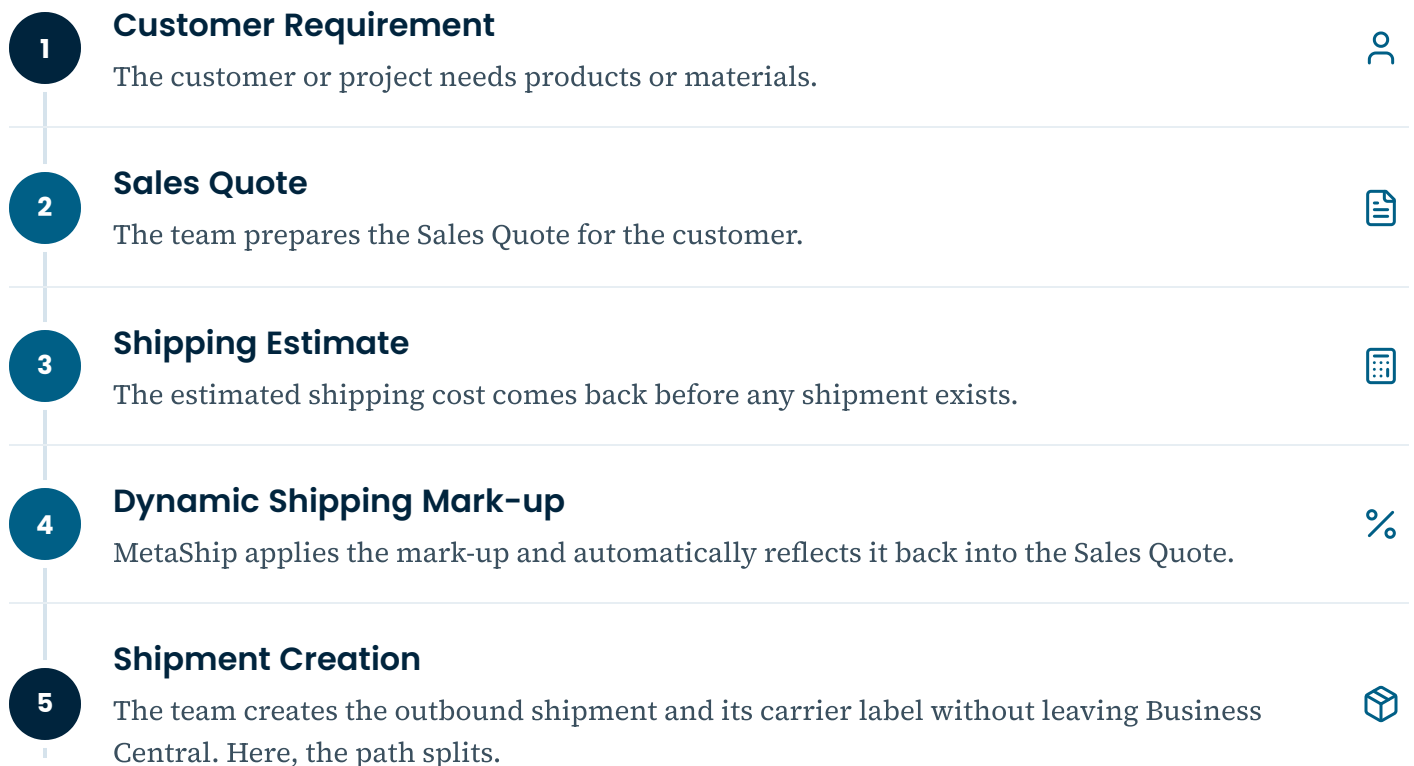
Freight Shipment and **HAZMAT Products Shipping** are in development. Neither is part of the completed implementation yet.

A note on language: these capabilities reflect what MetaShip does for the company's identified workflow. They are not a claim that every shipping scenario is automated, or that the process has no manual steps.

THE BUSINESS CENTRAL SHIPPING WORKFLOW

From quote to shipment to return

Five steps take a customer requirement to a shipment, all inside Business Central. Then each item follows its own journey.



ONE WORKFLOW, DIFFERENT ITEM JOURNEYS

→ Regular Items



A single, one-way move from the company to the customer or job site. The journey ends on arrival.

↺ Rental Items

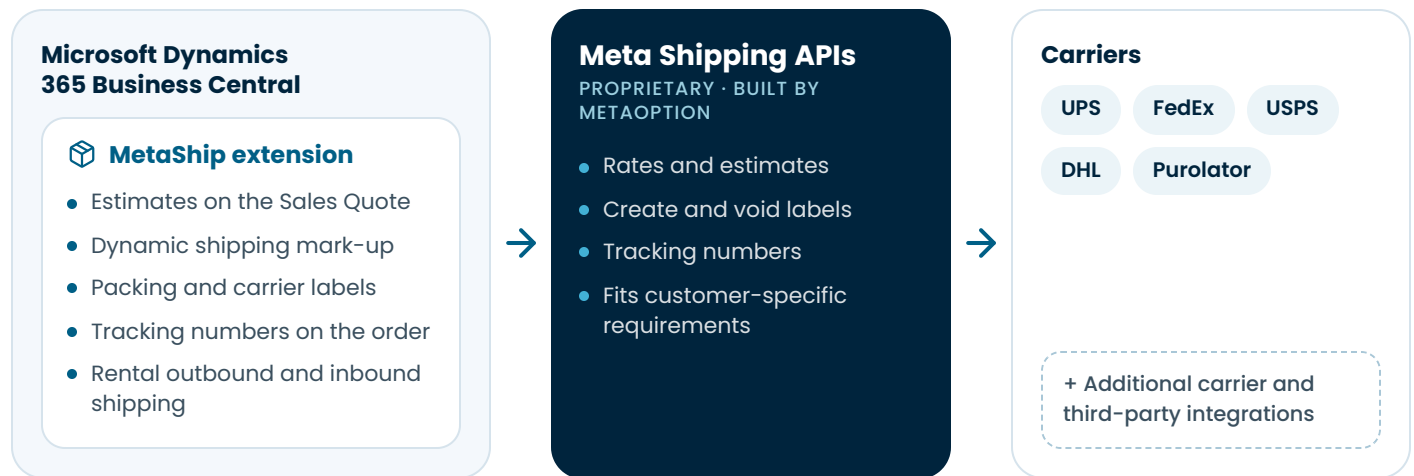


A round trip. The item travels out to the event, does its job and should come back once the project ends.

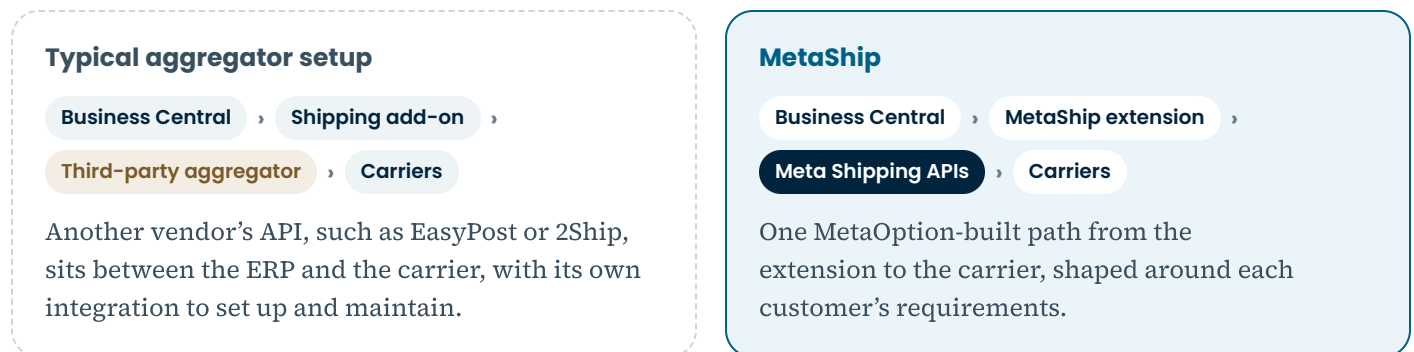
UNDER THE HOOD

Meta Shipping APIs: a direct line from Business Central to the carriers

Many shipping add-ons route carrier calls through third-party aggregators such as EasyPost or 2Ship. MetaShip runs on its own proprietary shipping API layer instead: the Meta Shipping APIs.



Simplified view. Every step from estimate to label runs through one MetaOption-built API layer.



Fewer moving parts

No third-party aggregator to integrate, configure or keep in sync.



Built around the customer

Flexible enough for requirements like this company's quote mark-ups and rental returns.



Ready to extend

Additional carriers and third-party integrations connect through the same API layer.

— THE OUTCOME

Shipping became part of the conversation earlier

For the company, the goal wasn't simply to create another shipment. It was to make shipping a more connected part of the journey: from customer quote to outbound movement and, when needed, back again.

THIS STORY WILL FEEL FAMILIAR IF YOUR TEAM:

- ✓ Runs its business on Microsoft Dynamics 365 Business Central
- ✓ Creates labels in FedEx Ship Manager, UPS WorldShip or carrier websites
- ✓ Needs shipping cost and mark-up in the quote, before anything ships
- ✓ Ships rental items out and needs them back

See what a more connected shipping workflow can look like



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For Business Central partners

Bring MetaShip to your Business Central customers: a native extension on proprietary Meta Shipping APIs, with no third-party aggregator to stitch in. Write to info@metaship365.com to start the conversation.

About MetaShip. MetaShip by MetaOption is native shipping management software for Microsoft Dynamics 365 Business Central. It brings multi-carrier shipping, smart picking, live rate quotes and end-to-end tracking into one connected flow. Learn more about [Business Central shipping with MetaShip](#).