



Customization Overview

Guernsey Farms Dairy



Michigan's longest-running, 3rd generation family-owned dairy processors in operation since 1940.

Location: Northdale, MI

Processing farm, ice cream shop, and a family restaurant on the same grounds.

Products: milk, cream, ice cream, and a few other specialty products.

Guernsey works with a local 4th generation family-owned farm where they get all of the milk used in their products.

Believes in community, family, and making wholesome products.

"The integration process when upgrading and/or changing ERP systems was fairly seamless. And the knowledge of their systems by their team members made training and using easy."

-Senior Accountant, Guernsey Farms

Objectives

Guernsey offers a variety of products such as milk and ice cream, which are sold in various locations including grocery stores, small businesses, and gas stations in the United States. In 2021, they began implementing Acumatica Cloud ERP and made a couple of things clear that they needed to run properly. They were on Macola, a legacy system, where specific routes were scheduled on certain days and only carried specific inventory. But they needed their ERP to be able to keep up with their logistics.

Tailored Solutions

Algorithm customized the Customer screen to improve efficiency by adding delivery days, routes, and by adding a list of regularly purchased items for each store. The Customer Service Rep (CSR) uses a new custom "Call Sheet" screen that displays routes and stores with their contact information for a given delivery date. While working the Call Sheet, the CSR can click a single button to launch another new custom "Call Sheet Order" screen, which lists the predefined list of items. The CSR can quickly go down the list entering quantities their customers need, and when ready, click a button to create a fully populated Sales Order. Specialty or one-off items can be added to the Sales Order at this time and when saved, the new Sales Order number is captured on presented on the Call Sheet screen, showing the CSR's progress.

Benefits

- CSRs can navigate through the system with ease, minimizing errors and increasing productivity.
- The fluidity of screens allows for a seamless transition from one task to another, enhancing efficiency and saving valuable time.
- Eliminate unnecessary steps in the order entry process, further streamlining operations.