



8

# Must-Have ERP Features for Food Distributors

*EXPECT MORE FROM YOUR SYSTEM*

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## INTRODUCTION

# Is Your Software Older than Your Warehouse Workers?

If you're like most distributors we've spoken with, you may be solving many of the challenges you face with labor, but have you considered your software? You likely have an ERP or accounting system in place, but are there features you're missing that might help you streamline essential parts of your business like:

- **Procurement**
- **Forecasting**
- **Warehousing**
- **Sales**
- **Marketing**

**How many hours is your team wasting on manual processes in these areas?**

If you're wondering if there's a better way, there is! And for food distributors, the story is even better. All the unique, industry-specific features you need can be found in a modern ERP solution.

To help you know what you should be expecting from your software, we compiled a list of **8 must-have ERP features for food distributors**. As you consider any upgrade, keep this list handy to ensure you get everything you need. If you can check them all off, you can be confident you're making the right choice!

*“I don’t think we could be where we are today without the partnership with Innovia since 2007. They’ve really taken the time to know our business and know what I expect to happen. Innovia cares about the end result and customer satisfaction.”*

[Click Here to Read the Entire Case Study](#)

— ROB NEWHART, CIO

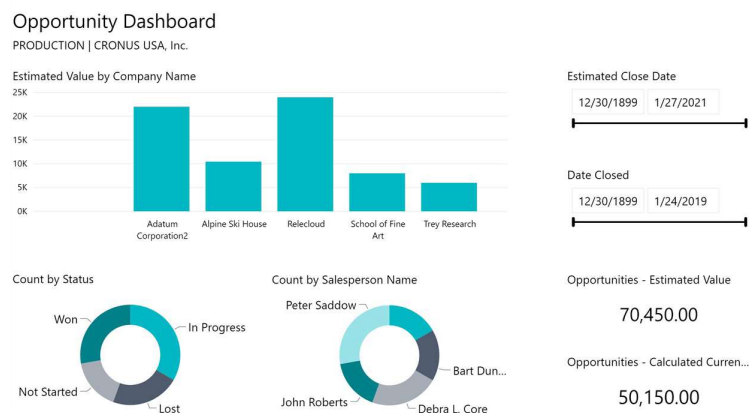
## FEATURE 1

# Analytics and Reporting

When you step back and look at how your business is doing, how do you get your reporting data? Does your team export spreadsheets from your system and manipulate them in Excel? This approach works on a small scale, but your business has many moving parts, so it's hard for this method to truly capture what's going on. Even worse, by the time the data is ready to read, it might be out-of-date.

That's why your ERP system needs robust reporting features. You need to see:

- **Inventory levels**
- **Sales performance**
- **AR/AP data**
- **Purchasing reports**
- **And much more in real-time**



And with Microsoft Dynamics 365 Business Central, your reporting options are even wider. Because it works seamlessly with Microsoft's Power BI platform, you have one of the most powerful business intelligence solutions in the world at your disposal.

**Easily create visuals, reports, and dashboards to capture everything going on at your business and how it all comes together.**

## FEATURE 2

# Earned Income/Rebates

Rebates can be challenging to keep track of, can't they? With so many points for the process to break down, it's no surprise that many distributors don't take advantage of all the rebates they're entitled to. Wouldn't you like to stop leaving money on the table?



To get there, you need your ERP system to truly capture and report on the rebate process from start to finish. You need to see where all your programs sit at any given time and what your team needs to do to fulfill their requirements.

With Microsoft Dynamics 365 Business Central configured by a team that understands rebates, you'll gain the visibility you need to keep all your rebate programs on track, which means more money in your pocket.

Want to See this Feature in Action?

[Watch a Demo](#)

**Imagine it was simple to reconcile what your vendors owe you and what you owe your customers. Would rebates be less of a topic of worried conversation at your business?**



## FEATURE 3

# Outlook Integration for Customer Service, Sales, and Purchasing

Is your ERP operating in a silo? Do your teams constantly need to enter data twice – once in programs like Outlook and Excel and then again in the ERP? If so, you likely want to reduce this wasted effort.



With Microsoft Dynamics 365 Business Central, your Outlook and ERP systems work together seamlessly. You can:

- **Pull data between them**
- **Record email conversations in your ERP automatically**
- **Gain better insight into how your team takes care of customers with built-in CRM**
- **Generate sales orders and other documents on-the-fly, right from the email compose window**

All this means fewer members of your staff need to be “in the system.” For simple tasks, your associates don’t even need to open the ERP. They can simply get the job done, know that the data is getting where it needs to go, and move on to the next task.

Want to See this Feature in Action?

[Watch a Demo](#)

Imagine how much time you could save for other critical business priorities if you could eliminate double-entry and time spent moving from one system to another!

## FEATURE 4

# Order Guides

Establishing clear order guides is critical. They help your sales and fulfillment teams do their jobs by taking the guesswork out of what goes into an order, what to charge, and more.

Traditionally, an order guide might have been a long spreadsheet with detailed item numbers, pack sizes, and pricing for each customer. To process an order, a salesperson consulted the guide and manually added each item needed and the appropriate pricing; however, with a modern ERP system designed for food distributors, this process is much faster!

With Microsoft Dynamics 365 Business Central, salespeople can set up each customer's order guide once and reference it right from the ERP. In addition to the basic information all order guides offer, you can also include:

- **Product information**
- **Pictures**
- **Nutritional information**

With just a couple of clicks, your order is ready to go, and you can be confident your fulfillment team will have everything they need because you're tracking your inventory in the same system!

Want to See this Feature in Action?

[Watch a Demo](#)

**Imagine if your sales reps never had to ask where that order guide was saved again ...**

## FEATURE 5

# eCommerce

One of the fastest-growing markets for any industry, including food, is eCommerce. While you might think only direct-to-consumer retailers need eCommerce solutions, in recent years the B2B eCommerce market has grown exponentially.

Do your customers do business on your time or their time? How easily can they:

- **See what's available**
- **Make purchases**
- **And move on with their day!**

eCommerce integrated with an ERP system makes it easy for your customers to do business with you **24/7/365**.

With Microsoft Dynamics 365 Business Central, you have the eCommerce options you need to offer this level of service. You can create a full-featured online platform for your customers that ties directly into your inventory, which reduces the number of times you get orders for stock you don't have.

Better yet, the whole process is just faster, improving your customer satisfaction, *and* saving your sales team's time!

**If you can't do this with your ERP, you're missing a key feature that could help your business stay competitive!**



## FEATURE 6

# Catch Weights

Catch weights are an essential component of the food distribution business. You use them every day to charge your customers fairly and meet their demands. But how well does your system handle catch weights? Do you constantly need to make manual adjustments to figures to accommodate for a lack of catch weight functionality?

If you're talking to an ERP partner who isn't familiar with the food distribution industry, you would likely need to explain to them what you need from a catch weight solution. In many cases, the solution offered may be ad hoc development, which can be cumbersome and difficult to update.

If this sounds like a problem you're facing, you should take a look at Microsoft Dynamics 365 Business Central. With it, food distributors can easily set up the catch weight functions they need so that sales and invoicing are simplified.

After all, what's the point of an accounting system that you need to "translate" from the way you do business to make work?

Want to See this Feature in Action?

[Watch a Demo](#)

**Microsoft Dynamics 365 Business Central is built for food distributors, so you can be confident catch weights will be recorded accurately and tied to the right products and transactions to keep your business moving.**

## FEATURE 7

# Lot Control

There are so many reasons why you need robust lot control. You need lot numbers to follow every food item in your inventory from the point it arrives to the point it leaves. After all, what happens when there is a recall? Can you quickly find the stock in question and take care of the situation?

Does your ERP track lots? How well does that information transfer to different objects and to external systems? Is there a point of breakdown? If your ERP doesn't deliver on lot control, you're probably paying the price elsewhere, usually with higher labor costs or compliance penalties.



With Microsoft Dynamics 365 Business Central, lot control is easy. You can assign lot numbers from a wide variety of smartly designed menus in the system, and even set up rules to sequentially assign lot numbers to incoming items. You can also automatically track critical factors like:

- **Freshness**
- **Aging requirements**
- **Location of Origin**

Want to See this Feature in Action?

[Watch a Demo](#)

All of this means less hassle for your team and more satisfied customers.

## FEATURE 8

# Warehouse Management

Running a warehouse today takes a lot of data, and when things break down and you ship the wrong item, you not only get an unhappy customer but also items returned that you may not be able to sell. Not to mention incorrect inventory counts!

To prevent this, your ERP system needs to keep track of a wide range of factors, including:

- **Order selection**
- **Receiving**
- **Cycle counts**
- **Overstock and replenishment**



With Microsoft Dynamics 365 Business Central, these functions are covered. Your team will know where things are, where they need to go, and all the data points you need with minimal effort and “digging” through systems.

**All of this helps your warehouse run more efficiently, saving you time and reducing your labor costs.**



## STONEWALL KITCHEN

*“What we really appreciate is that they don’t nickel-and-dime us; while we certainly expect to pay for services, it’s clear that Innovia is focused on adding value, not on generating opportunities to send a bill.”*

[Click Here to Read the Entire Case Study](#)



— ANDREA HALL, IT DIRECTOR





## Where the Rubber Meets the Road How Can You Get All These Features?

Now that you know the 8 things you must have in your ERP system, how do you bring it all together and actually implement one? The last piece of the puzzle is a partner that knows food distribution and can configure your ERP to meet your industry-specific needs.

Innovia Consulting is the partner you're looking for! An entire section of the company works exclusively with the food industry, including two dedicated customer engagement specialists and consultants/developers that have worked with companies just like yours for years. We know you need these essential features (and many more, as well) to meet your demands, and we make sure you get them in Business Central.

One of our clients, Rob Newhart from Single Source, commented:

Innovia Consulting has always been able to help us achieve goals by understanding our vision of staying lean and pushing automation. Many employees have been around a long time and know our implementation. We have been through 2 major upgrades with zero downtime to our customers and users.

**If you're ready to say goodbye to software and partners that just don't understand your business, reach out to Innovia Consulting today!**

# You have gotten this far, how about one more step?

Book a time with one of our food  
distribution specialists to talk  
about your goals



Scott Borsodi

Use our Microsoft Bookings  
calendar to schedule your call at  
a time that works for you.

[Click Here to Book Now](#)



Scott Warner

Or if you want more information, contact us today at  
1-800-834-7700 or send a message to [sales@innovia.com](mailto:sales@innovia.com).

