

IN BRIEF

- **Goal:** Eliminating the manual spreadsheet maintenance and allowing the accounting system to provide the necessary information dynamically to the users also automating the “Route Management” and “Order Entry” process.
- **Solution:** Modifications to the Accounts Receivable and Sales Order modules in MAS 90®.
- **Results:** After the modifications were implemented, the manual tasks were completely eliminated. The system was completely automated to increase the productivity and the efficiency of the users.

About The Company

My Dairy Company (actual name has been changed) is a full service specialty dairy products distributor. Their specialty is frozen dairy desserts including soft serve, custard, frozen yogurt, hard pack ice cream, and shake mixes.

Their market area covers three mid-western states.

Situation

One of the owners of My Dairy Company described the situation as too much manual work and less productivity and efficiency with the staff. Since My Dairy Company is shipping products to three different states they have to create routes for each truck that will deliver the products.

At the time My Dairy Company was maintaining multiple Excel spreadsheets to determine which customer was on which route in any given day of the week. As new customers were added to the delivery schedule, the contact information, telephone number, address, etc. would then need to be updated into these spreadsheets. Any changes to customer data also needed to be reflected in the spreadsheets. The owners described it as a full-time job with too much room for errors.

Everyday employees would get one of the spreadsheets and call each customer on that list to find out if they needed a shipment for the next day. If the customer requested a shipment, then the employee went into MAS 90® and created a sales order for that customer. At this point, the employee would ask the customer what products he/she wanted to be delivered. After all the products were entered into MAS 90, the employee would save the order and move on to the next customer on the list until all the customers were contacted.

After all the orders were entered into the MAS 90 system, My Dairy Company had to determine the route for each truck driver. They printed the invoices and packing slips, sorted them based on the route of each truck so that the truck drivers would get their own paperwork to complete their delivery.

The owners wanted to eliminate the Excel spreadsheets completely. They wanted everything to be done through MAS 90, since it was their accounting software. My Dairy Company wanted to automate the order entry, route management, and ultimately increase the productivity and efficiency of their employees.

Challenges

The main challenge in this project was to determine the level of automation, and design one single interface for the end-users that included the necessary functions that they needed to have.

Solution

After several design meetings between My Dairy Company and HighTower, the required modifications for MAS 90 were defined. HighTower modified A/R Customer Maintenance and added eight new fields to the screen. These fields included "Route ID" numbers for the days from Monday through Saturday, the "Display on the Daily Route Worksheet" check box, and the Invoice Form Code field.

HighTower then created a new custom program called "Daily Route Worksheet," which replaced the Excel spreadsheets. This program became the only interface that the My Dairy Company employee needed. In order to get the list of customers to contact, the employee needed to enter a "Route ID" and the day of the shipment. Once these two fields were filled, the program compiled a customer list based on the modifications added to Customer Maintenance. Through this new screen, the employee was able to click on a button and the Sales Order Entry screen would automatically pop-up creating a new order for the selected customer. All the items that the customer purchased for the past six months would default to the lines screen for the employee to go through and ask which one of the items the customer would like to purchase. Once the order was completed, the Sales Order screen closed and the "Daily Route Worksheet" screen reappeared, clearing that customer from the list. The employee would repeat the same process until there were no more customers left on the list.

HighTower also modified the invoice printing to group the invoices by the Route ID along with a new packing slip program that also grouped all the packing slips by the Route ID. This modification eliminated figuring out the routes and sorting invoices/packing slips.

Results

After the modifications were implemented, My Dairy Company was so excited about the results because they could see the impact that these modifications did for their business from day one. There were no more spreadsheets to maintain and everything was being done in MAS 90 through a single user interface, which fully automated the "Route Management" and "Order Entry" for them.