

Mezcla saved 12+ hours per week with order-to-cash automation

OVERVIEW

Mezcla is a fast-growing snack brand known for its globally inspired, plant-based protein bars.

As order volume surged across D2C and wholesale channels, it became clear that their previous operational processes would become unsustainable within 12-18 months.

Every order required manual data entry across disconnected systems for shipment and invoicing. Mezcla implemented DOSS to consolidate and automate their entire order-to-cash workflow.

With fully composable modules for order and sample management, warehouse and freight coordination, and financial operations, DOSS gives Mezcla a single, scalable system to support their growth.

12+

HOURS SAVED PER WEEK

2x

FASTER P.O. PROCESSING SPEED

End-to-end automation

FROM ORDER INTAKE THROUGH DELIVERY AND PAYMENT

Accurate, real-time visibility

ACROSS THE ORDER JOURNEY (NO MANUAL ERRORS)

Scalable operations

SUPPORTING ORDER GROWTH WITHOUT INCREASING HEADCOUNT

The background behind the snacktime sensation

Mezcla has been exploding across the snack food scene since 2020, with revenue doubling YoY by the time we met. Their globally inspired, plant-based protein bars have quickly become a favorite at national retailers like Whole Foods, Sprouts, Kroger banners, and Albertson's, as well as regional grocery chains, specialty shops, gyms, and indie cafes.

With rapid growth came new challenges

Orders were pouring in from direct-to-customer (D2C) and wholesale channels. When Senior Operations Associate Justin Grender joined Mezcla to manage the entire order-to-cash process, he inherited a patchwork of tools: Airtable for order management (OMS), Owlery for freight quoting, Quickbooks for accounting, and spreadsheets to consolidate reports.

Everything was manual.

Justin was painstakingly typing information from email and SPS Commerce (EDI) for every order into Airtable and Quickbooks. On top of that, delays from SPS Commerce slowed order and invoice exchanges, while outdated or misconfigured integrations from other trading partners led to inconsistent data, debugging, and a ton of back and forth.



"I would get orders via email or EDI and have to note all of these orders down one by one into our old OMS, which was Airtable – basically a centralized spreadsheet. It was a very tedious task. *If I fat-fingered something, a decimal point off could move our revenue the wrong way.*"

Justin Grender, Senior Operations Associate at Mezcla

This clearly wasn't scalable.

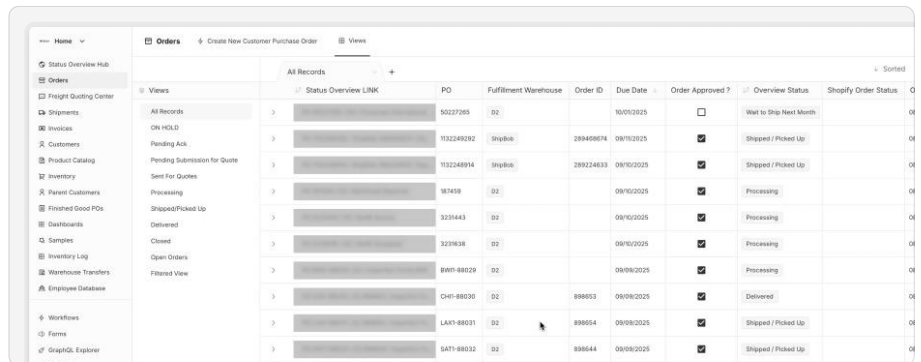
Mezcla needed to streamline order processing and fulfillment to hit a major fulfillment KPI: on-time, in-full deliveries (OTIF). To do that, they had to move from a slow, error-prone, fragmented system to one with reliable automation and end-to-end visibility.

The solution unified orders, freight, and finance

Mezcla chose DOSS for its speed, flexibility, and hands-on support from the team that actually builds the product everyday. Compared to other ERPs with rigid, static configurations, DOSS was the better fit to support Mezcla's unique processes with 3PLs and warehouses. DOSS enables Justin to exponentially scale Mezcla's growth, reducing manual work and error for good.

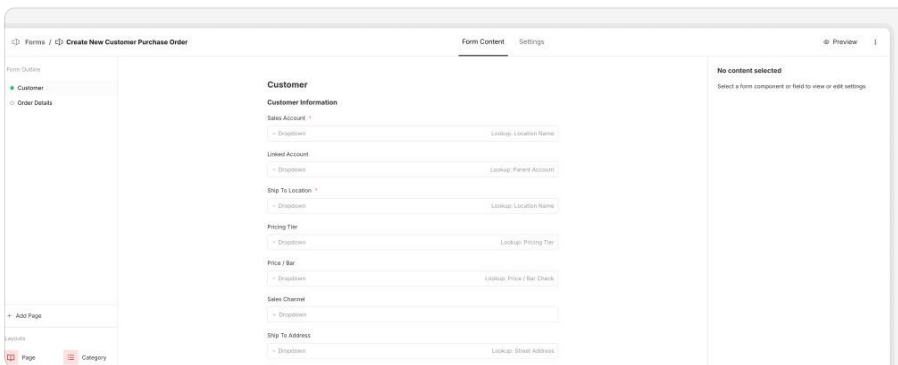
The recipe for every operational process involves three main components in DOSS, all of which are fully composable and interlinked:

1. **Tables** that store a real-time record of every order, customer, quote, invoice, etc.



Status Overview LINK	PO	Fulfillment Warehouse	Order ID	Due Date	Order Approved ?	Overview Status	Shopify Order Status
ON HOLD	50237285	S2		10/01/2025	<input type="checkbox"/>	Wait to Ship Next Month	
Pending Ack	102249292	Shipbox	289498074	08/10/2025	<input checked="" type="checkbox"/>	Shipped / Picked Up	
Pending Submission for Quote	102248914	Shipbox	289224633	08/10/2025	<input checked="" type="checkbox"/>	Shipped / Picked Up	
Send For Quotes	97459	S2		08/10/2025	<input checked="" type="checkbox"/>	Processing	
Shipped/Picked Up	323643	S2		08/10/2025	<input checked="" type="checkbox"/>	Processing	
Delivered	323638	S2		08/10/2025	<input checked="" type="checkbox"/>	Processing	
Closed	8901-88029	S2		08/08/2025	<input checked="" type="checkbox"/>	Processing	
Open Orders	CHN-88030	S2	898053	08/08/2025	<input checked="" type="checkbox"/>	Delivered	
Filtered View	LAR1-88031	S2	898054	08/08/2025	<input checked="" type="checkbox"/>	Shipped / Picked Up	
	SAT1-88032	S2	898044	08/08/2025	<input checked="" type="checkbox"/>	Shipped / Picked Up	

2. **Forms** with easy dropdowns and rules to create new POs, locations, sample orders, etc.



Form Outline

- Customer
- Order Details

Form Content

Customer Information

Sales Account

Linked Account

Ship To Location

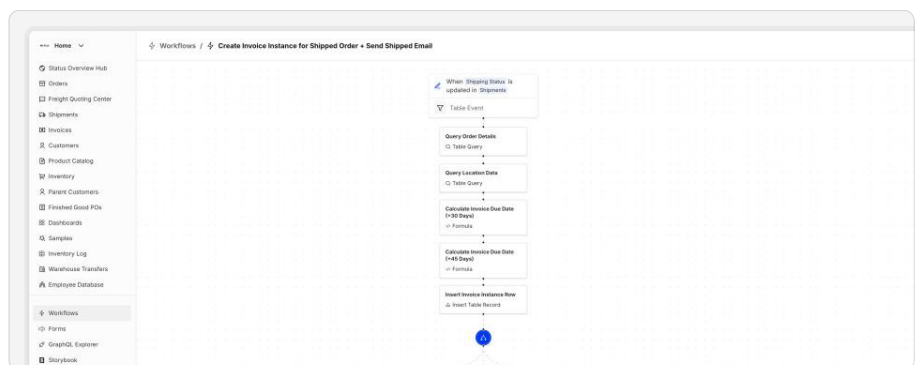
Pricing Tier

Price / Fee

Sales Channel

Ship To Address

3. **Workflows** that automatically trigger a chain of events based on form submissions, record updates, and other actions



Removing the need for Airtable and Owlerly, DOSS provides a unified source of truth that automates three key processes for Mezcla:

1. Order & Sample Management

2. Freight & Fulfillment

3. Finance & Accounting

1. Order & Sample Management

Mezcla needed a system that could efficiently handle massive order and sample volumes. Jeng dela Cruz (Senior CX Analyst) joined Justin's team shortly before implementing DOSS to support Mezcla's strategic expansion, but the focus stayed firmly on reducing manual work.

"My goal is that as we continue to increase revenue, order volumes, order frequencies and customers, my time spent in day-to-day operations does not also increase. ***It's a 10x tool because it's so automated, easy to use and efficient.*** And I have seen that – ***we've increased our orders processed on DOSS and I haven't really increased my time in DOSS.***"

Justin Grender
Senior Operations Associate, Mezcla

1A. Order Management

The core of Mezcla's operations lives in the **order management table**, which centralizes all wholesale orders with details by SKU, customer, shipment, PO, invoice, warehouse, shipping information, costs, revenue, etc.

Automated workflows ensure that this table is up-to-date across every step of the journey, from order intake to delivery. Mezcla can also update the price catalog with pricebook changes at any time, which reflect back into the order management table when orders are placed.

Home

Status Overview Hub

Orders

Freight Quoting Center

Shipments

Invoices

Customers

Product Catalog

Inventory

Parent Customers

Finished Good POs

Dashboards

Samples

Inventory Log

Warehouse Transfers

Employee Database

Workflows

Forms

GraphQL Explorer

Storybook

Orders

Create New Customer Purchase Order

Views

Activity

All Records

Views

Status Overview LINK

PO

Fulfillment Warehouse

Order ID

Due Date

Order Approved ?

Overview Status

Shopify Order Status

Order Date

Order Link

All Records

ON HOLD

Pending Ack

Pending Submission for Quote

Sent For Quotes

Processing

Shipped/Picked Up

Delivered

Closed

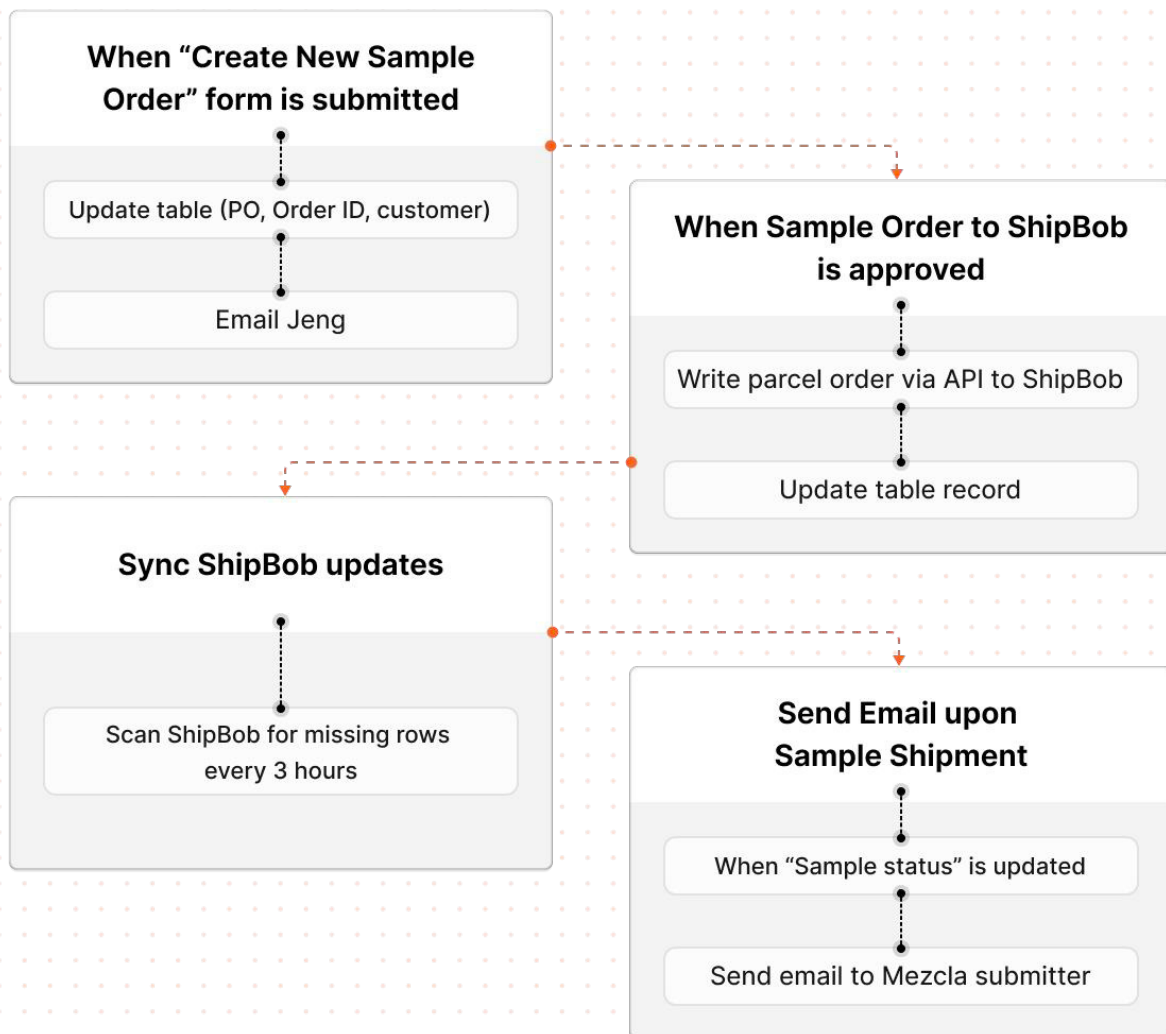
Open Orders

Filtered View

1B. Sample management

Mezcla sends a LOT of product samples to marketing events, brokers, and potential customers. Samples live in a separate table from orders, but are functionally similar. The main difference is that requests can come from anyone on the Mezcla team.

When someone fills out the “**Create New Sample Order**” form through a shared URL, four workflows are triggered to automate the entire order creation and shipment process fulfilled via ShipBob (3PL provider):



"All that Jeng has to do is click an approval checkbox via email and it flows through. **Previously, she had to fill out a form and then go into ShipBob and enter all of the items and quantities manually.** She doesn't have to do that anymore, which saves her a ton of time."

Justin Grender
Senior Operations Associate, Mezcla

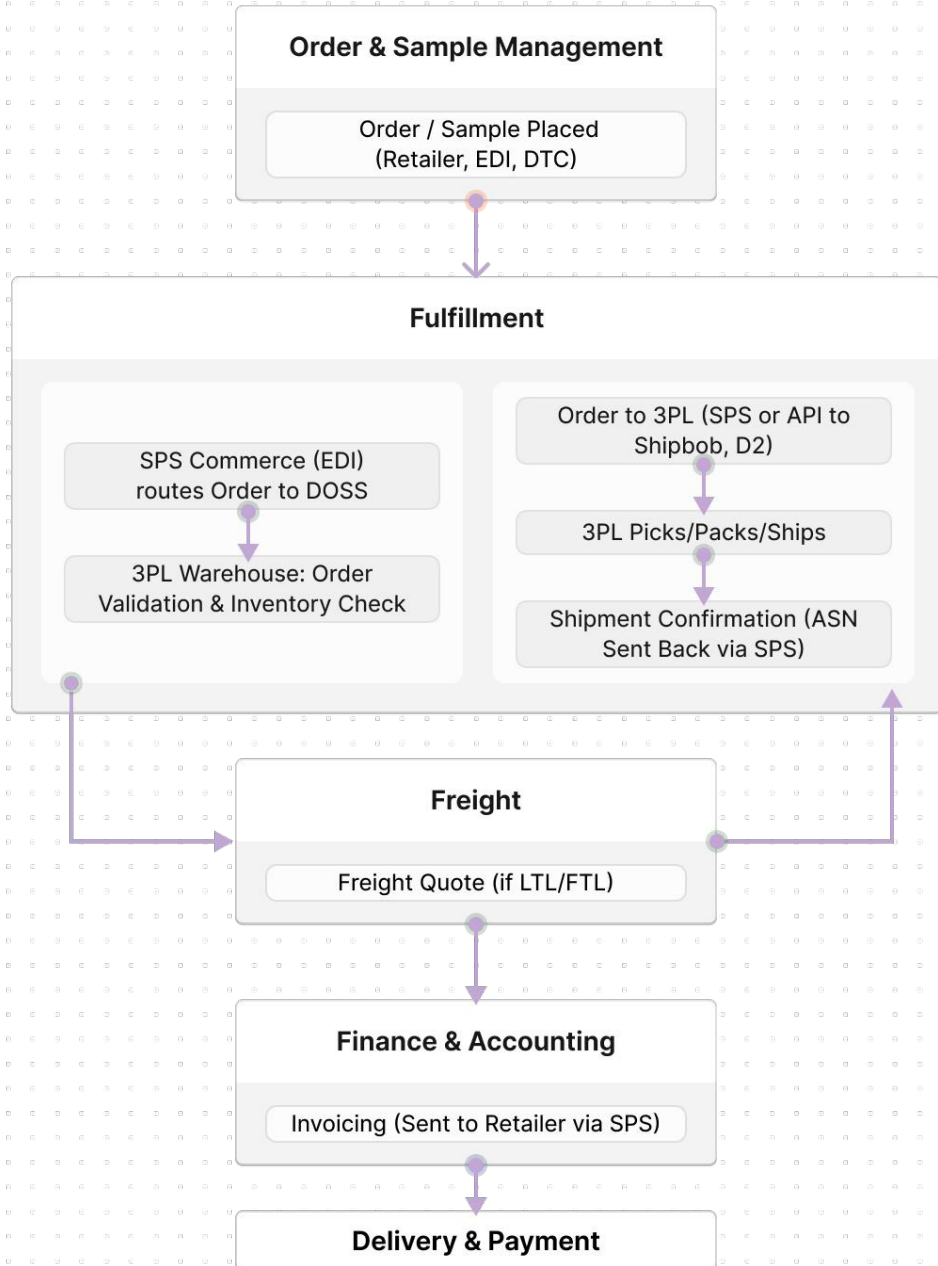
2. Freight & Fulfillment

2A. Fulfillment

Once a sample or order is placed via SPS Commerce (EDI), we automate the entire order intake and fulfillment process, syncing all order, shipment, and inventory data with SPS and 3PL providers (Shipbob and D2).

Workflows handle:

- Order intake, validation, and acknowledgement workflows with SPS Commerce
- Sending Advance Ship Notices (ASN) and invoices directly to SPS partners
- Real-time updates on fulfillment status, ship dates, tracking numbers, and carrier details with Shipbob
- Tracking status notifications to internal and external stakeholders



2B. Freight quoting center

Replacing Owlery, Mezcla now streamlines shipment quoting and broker selection directly in DOSS for unified logistics management:

- Digitizes freight requests to multiple brokers, tracking all quotes within DOSS
- Workflows instantly compare spot quotes via integrated API (EchoShip)
- Connects approved carrier and shipping details directly to order records

3. Finance & Accounting

Finally, DOSS connects order and fulfillment data directly with QuickBooks and SPS to make invoicing a breeze. No more manually entering invoice details from email.

Invoices are generated automatically and can be sent to both SPS and QuickBooks with one click.

5 Invoicing Workflows

1. Generate Invoice
2. Send invoice to SPS from Invoice Table
3. Issue Invoice to QBO (Small Parcel)
4. Create Customer Invoice Instance for Shipped Order + Send Shipped Email
5. Update Invoice Amount if Parameters Updated

MEZCLA

INVOICE

1132249292-Equinox141

DATE ISSUED	DATE DUE
06/21/2025	09/19/2025

INV #	PO #
1132249292-Equinox141	


PAYMENT TERMS	FREIGHT TERMS
NET 30	

ISSUER
East Mezcla Inc.
988 5th Ave Fl 11 New York, NY 10075 US
Phone: +1 646 7893147
Email: accounting@eastmezcla.com

BILL TO
Equinox 141 Darlen - F&B
72 Heights Rd, Darlen, CT 06820
Phone:
Email:

#	Name	Description	Qty	Unit Price (\$)	Item Total (\$)
1	Bar-AB 12 Bar Caddy		2	\$20.76	\$41.52
2			1	\$11.61	\$11.61
Total					\$53.13

Comments or Special Instructions

 DOSS

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Likewise, new PO forms by customer or vendor trigger workflows for everything else. DOSS also saves the finance team time on reconciliation processes with automatic recordkeeping, centralized invoice storage, and audit-ready reports.

“There are three main time savings: ***the samples piece saves Jeng about 10 hours a week***, order processing saves us about an hour or two a week, and invoicing saves me a ton of time. There's no copy paste: just add the items, add the quantities, check the revenue, send.”

Justin Grender
Senior Operations Associate, Mezcla

From manual grind to meaningful impact

Since implementing DOSS, Justin has transformed Mezcla's operations from a manual, error-prone process into a streamlined system that scales with their growth. The numbers tell the story: 2x faster PO processing and 12+ hours per week saved on samples and orders.

But the real win isn't just efficiency; it's strategic capacity. Justin and Jeng can now focus on higher-level initiatives like major retailer launches, warehouse optimization, and exponentially scaling Mezcla's growth without increasing headcount.

The transformation has supported ongoing improvements in operational efficiency, as well as helping to maintain high OTIF metrics MoM. Most importantly, DOSS has given Mezcla the foundation to scale without constantly reworking their systems.

For growing brands like Mezcla, the choice isn't just about finding an ERP—it's about finding a system that grows with you, adapts to your unique processes, and frees up your team to focus on what matters most: building the business.

"Less manual work equals more time spent on strategic initiatives. ***I want to be able to focus more on the bigger picture and worry less about the day-to-day side.***"

Justin Grender
Senior Operations Associate, Mezcla



Final advice:

"Larger ERPs tend to be expensive with significant software and implementation costs. We needed a solution we could go live with as we enter the growth stage of our business. ***Rather than spending months on ice with a consultant, we moved fast with DOSS*** because we felt the platform could grow with us and Mezcla could avoid constant tech stack transitions."

Justin Grender
Senior Operations Associate, Mezcla