

The Lifecycle of a Mushroom Supply Order — Legacy vs ERP

Unpacking the Inefficiencies & Unlocking Seamless Operations

LEGACY SYSTEM CHAOS

Order Placement

[Customer]



Customer places an order on an e-commerce website

Manual Order Entry

[Sales/Admin]



Sales rep manually re-enters order details into a separate accounting or inventory system

Manual Payment Reconciliation

[Finance]



Finance team manually matches e-commerce payments to bank transactions; applies prepayments with back-and-forth communication.

PO Creation

[Fragmented Data Pull]



Purchasing pulls stock levels, sales forecasts, and backorder details from 2-3 different systems. Manual analysis to determine quantities.

Backorder Tracking

[External]



Backorders are tracked in a separate CRM or Google Sheet because the inventory system lacks native functionality.

Invoicing

[Duplicate & Manual]



Temporary invoice manually created in QuickBooks for payment, then deleted. Another invoice automatically generated by Fishbowl. Manual reconciliation required.

Fulfillment & Shipping

[Manual Updates]



Manual updates for shipping status. No systematic recording of damaged items on receipt (relying on emails/pictures). Splitting single POs for partial shipments.

Returns & Exchanges

[Clunky Process]



Customer initiates return via email. No direct exchange policy; customer must return item and create a brand new order. Refund processed only upon physical receipt.

Reporting

[Opaque & Slow]



Discounts aggregated without granular detail. Slow reports due to extensive chart of accounts. Manual data compilation for tax reporting. No systematic vendor performance metrics.

ERP STREAMLINED FLOW

Order Placement

[Customer]



Customer places an order on an **integrated** e-commerce website.

Automated Order Flow

[ERP]



Description: Order automatically flows into the centralized ERP system (e.g., Oracle NetSuite) in real-time.

Automated Payment Matching

[Finance]



Payments automatically matched to orders within the ERP. Real-time visibility into payment methods.

PO Creation

[Integrated Planning]



ERP generates purchase orders based on real-time inventory levels, sales forecasts, and demand planning. Automated suggestions for optimal quantities.

Backorder Tracking

[Native]



Backorders are tracked natively within the ERP system, providing real-time visibility and accurate lead times.

Invoicing

[Automated & Unified]



Single, automated invoice generation directly from the ERP. Prepayments are automatically applied and tracked.

Fulfillment & Shipping

[Integrated]



Real-time inventory updates. Integrated shipping. Systematic recording of damaged items upon receipt. Single PO for partial shipments.

Returns & Exchanges

[Streamlined Workflow]



Automated, streamlined workflow for returns and exchanges directly within the ERP, improving customer satisfaction and internal efficiency.

Reporting

[Granular & Real-time]



Real-time dashboards provide granular insights into individual discounts, comprehensive financial reports, automated tax reporting, and systematic vendor performance metrics.

Cultivate Your Business's Future with CEBA Solutions

Don't let disconnected software stunt your growth. **CEBA Solutions** helps mushroom cultivation and substrate suppliers bridge the gap between operations and finance by **implementing Oracle NetSuite, the world's #1 cloud ERP.**

Contact CEBA Solutions today to transform your operations and unlock seamless growth.

inquiries@cebasolutions.com