



LEFT COAST WHOLESALE:

Cultivating Growth
with NetSuite

cebasolutions.com

Powered by **ORACLE
NetSuite**



THE PILLARS OF A SCALABLE MUSHROOM SUPPLY CHAIN



Left Coast Wholesale (leftcoastwholesale.com) stands as a leading supplier in the booming mushroom cultivation and substrate industry. As their business expanded rapidly, the familiar tools that once supported their operations – primarily QuickBooks for accounting and Fishbowl for inventory – began to show their limitations. What started as a patchwork of seemingly efficient solutions evolved into a complex web of manual processes, data silos, and operational bottlenecks that threatened to stifle their impressive growth.

Left Coast Wholesale recognized that to truly scale and maintain their leadership position, they needed a unified system that could connect their entire business, from sales and inventory to finance and customer service. Their journey to Oracle NetSuite, partnered with CEBA Solutions, is a testament to the power of integrated ERP in a dynamic market.



THE PAIN POINTS: WHEN "GOOD ENOUGH" BECOMES A BARRIER

Before NetSuite, Left Coast Wholesale faced a myriad of challenges stemming from their disconnected systems:

Operational Inefficiencies & Manual Overload:

- **Duplicate Invoicing:** A significant drain on their finance and sales teams was the creation of temporary invoices in QuickBooks for prepayments, only to delete them later when Fishbowl generated the "official" invoice. This led to constant "back-and-forth" communication and a high risk of errors.
- **Clunky Returns & Exchanges:** Their Shopify website lacked automatic return and exchange functions, forcing customers to initiate contact via email. The absence of a direct exchange policy meant customers had to return an item and create an entirely new order, with refunds delayed until physical receipt. This was a drain on customer service resources and a source of customer frustration.
- **Manual Purchase Order (PO) Creation:** Determining purchase quantities was a "very manual process," requiring data to be pulled from Fishbowl (stock levels), Salesforce (sales forecasts), and Google Sheets (backorder details). This fragmented approach was inefficient and prone to inaccuracies, impacting inventory levels and procurement timelines.
- **International Order Complexities:** Maximizing container capacity for international orders involved manual calculation of cubic measurements and weight, as there was no integrated tool to combine this information into POs.



Data Silos & Lack of Visibility:

- **One-Way E-commerce Sync:** Their NetSuite connector for WooCommerce was primarily one-way, meaning order modifications or pricing updates made in Fishbowl wouldn't sync back to WooCommerce. This forced manual edits in both systems, causing data inaccuracies and customers losing their order history on the website.
- **Disconnected Product & Customer Data:** Product item information (like pricing updates) and customer details had to be manually updated in both Fishbowl and WooCommerce, leading to inconsistencies and wasted effort.
- **Untracked Backorders:** Fishbowl's inability to directly track backorders meant this crucial information was manually managed in Salesforce, creating blind spots in their supply chain and affecting customer communication.
- **Opaque Discounts:** Discounts from e-commerce platforms were aggregated into a single line item (e.g., "Shopify discount") in Fishbowl and QuickBooks, preventing granular analysis of specific coupon performance or product-level profitability.
- **Missing Damaged Goods Tracking:** There was no systematic way to track damaged items upon receipt in Fishbowl, relying instead on manual emails and pictures for vendor communication, which complicated claims and obscured true costs.



Financial & Reporting Headaches:

- **Difficult Bank Reconciliation:** Lack of clear visibility into payment methods for retail orders made manual bank reconciliation a time-consuming and error-prone task for their accounting team.
- **Bloated Chart of Accounts:** An extensive chart of accounts (610 accounts) including old product lines made reports slow and inefficient, and the hesitation to change it due to ties with Fishbowl and QuickBooks further compounded the issue.
- **Manual Expense & Tax Reporting:** Sales trip expense reporting was managed in Salesforce, but associating expenses to multiple customers was a challenge. Tax reporting from WooCommerce required manual downloading and formatting before uploading to TaxJar.

Left Coast Wholesale realized that these isolated systems were not just inconvenient; they were actively hindering their ability to grow efficiently, serve customers effectively, and gain the comprehensive insights needed for strategic decision-making.



THE SOLUTION: A UNIFIED PLATFORM WITH ORACLE NETSUITE

Recognizing these critical limitations, Left Coast Wholesale made the strategic decision to transition to Oracle NetSuite. They sought a solution that could provide a single, integrated platform for all their core business processes, eliminating the need for multiple disparate systems and manual workarounds.

NetSuite offered a comprehensive suite of functionalities that directly addressed Left Coast Wholesale's pain points:

- **End-to-End Automation:** NetSuite automated their order-to-cash and procure-to-pay cycles. Sales orders from their e-commerce platforms now flow seamlessly into NetSuite, triggering automated invoicing and fulfillment. Purchase orders are generated based on real-time inventory and demand, eliminating manual data pulls and ensuring optimal stock levels.
- **Real-Time, Bidirectional E-commerce Integration:** NetSuite provided true two-way synchronization with their e-commerce platforms. Order modifications, pricing updates, and product availability are now consistent across all channels, enhancing customer experience and data accuracy.



- **Unified Inventory & Supply Chain Management:** NetSuite's robust inventory capabilities allowed for native backorder tracking, systematic recording of damaged goods upon receipt, and efficient management of partial shipments within a single PO. This provided real-time visibility and control over their entire product lifecycle.
- **Streamlined Financial Operations:** Bank reconciliation became significantly easier with clear payment visibility. Discounts are tracked at a granular level, providing actionable insights. NetSuite's flexible chart of accounts allowed for more efficient reporting without compromising data integrity.
- **Enhanced Reporting & Analytics:** With all data residing in a single system, Left Coast Wholesale gained access to real-time dashboards and comprehensive reports, enabling them to make data-driven decisions on everything from sales performance to vendor reliability.
- **Scalability for Growth:** NetSuite's cloud-based architecture and modular design ensured that the system could easily scale with Left Coast Wholesale's rapid expansion, accommodating new products, vendors, and increasing transaction volumes without performance degradation.



Q6: What about the cost? Is an ERP significantly more expensive than QuickBooks?

A: The initial investment in an ERP is typically higher than QuickBooks. However, it's crucial to consider the **Total Cost of Ownership (TCO)** and the **Return on Investment (ROI)**. The "hidden costs" of sticking with QuickBooks and disparate systems include:

- **Wasted Labor:** Hours spent on manual data entry, reconciliation, and workarounds.
- **Lost Sales:** Due to inaccurate inventory, slow order processing, or poor customer experience.
- **Errors & Rework:** Costs associated with mistakes in invoicing, purchasing, or reporting.
- **Lack of Insight:** Inability to make data-driven decisions that could optimize profitability or identify growth opportunities.

A modern ERP provides significant ROI through increased efficiency, reduced errors, better decision-making, and enhanced scalability, often leading to substantial long-term savings and increased revenue that far outweigh the initial investment.



Q7: Will my team be able to adapt to a new system? What kind of training is involved?

A: User adoption is key to a successful ERP implementation. While there's always a learning curve with new software, modern ERPs like NetSuite are designed with user-friendly interfaces. A good implementation partner will provide:

- **Tailored Training:** Customized training programs that focus on your team's specific roles and workflows.
- **User Acceptance Testing (UAT):** Opportunities for your team to test the system with real-world scenarios before going live.
- **Ongoing Support:** Continued assistance after go-live to ensure your team is comfortable and proficient with the new system.

CEBA Solutions prioritizes comprehensive training and support to ensure your team embraces the new system with confidence.



Q8: How does CEBA Solutions specifically help mushroom cultivation suppliers with this transition?

A: CEBA Solutions brings a unique combination of ERP expertise and deep industry knowledge:

- **NetSuite Specialization:** We are Oracle NetSuite Solution Providers, with extensive experience in implementing and optimizing NetSuite for businesses of all sizes.
- **Industry Expertise:** We understand the specific operational nuances of mushroom cultivation and substrate suppliers – from managing specialized inventory and perishable goods to navigating unique supply chain dynamics and rapid product onboarding. We don't just implement software; we tailor it to your industry's specific needs.
- **Proven Methodology:** We follow a structured implementation methodology to ensure a smooth transition, minimize disruption, and maximize the value you get from your new ERP system.
- **End-to-End Partnership:** From initial assessment and data migration to customization, training, and ongoing support, we partner with you every step of the way to ensure your success.

Ready to move beyond QuickBooks and cultivate a more efficient, scalable future for your mushroom supply business?

Contact CEBA Solutions today for a personalized consultation.