



Caskata Saves 96 Days Per Year By Automating Order Management and Accounting with Extensiv

CASE STUDY

80%

OF DAILY BUSINESS PROCESSES
MANAGED IN EXTENSIV

SCALING

WITHOUT INCREASING
HEADCOUNT

"If you want an affordable but robust solution for running your business that can scale, Extensiv is a solid choice."

LEIGH JACOBY,
Director of Operations, Caskata

CASKATA

Caskata is a woman-owned, design-driven online table-top brand committed to designing and making uniquely beautiful products for the home, including tableware and gifts.

HIGHLIGHTS

Challenges

- Managing D2C and wholesale orders on disparate systems
- Coordinating multiple factories and 3PLs
- Lacking visibility into inventory and big-picture metrics

Solution

- Implements Extensiv
- Centralizes inventory and order management
- Seamlessly connects every sales channel and location
- Manages finances faster
- Predicts product demand and optimizes stock levels

Results

- 96 days saved every year
- 80% of business processes managed in Extensiv
- Scaling without hiring

Challenges

Manual order management and accounting

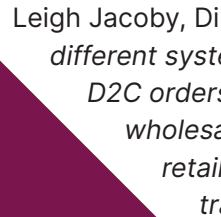
High-end tableware creator Caskata hasn't just survived the economic storms of the past few years; the business has positively thrived.

Caskata took the COVID pandemic in its stride, making an operational pivot as direct to customer (D2C) business overtook wholesale. And as sales soared, they took their first steps into outsourcing, forging partnerships with new factories and 3PL providers for the first time.

All this growth brought added complexity. And the team responsible for managing orders and fulfillment suddenly had a lot more on its plate.

Managing orders on disconnected systems

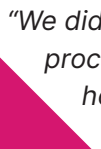
One of their acutest growing pains was running their operations across multiple, disparate systems. They had a complex web of customer relationships, orders, and inventory all living in different places.



Leigh Jacoby, Director of Operations, explains, "We had different systems for managing our wholesale and D2C orders. Plus, we still had manual entry for our wholesalers and no EDI connections for the big retailers that we traded with. It was really hard to track and forecast anything."

Lacking automation in order management and accounting


Managing orders and staying on top of financials was manual and onerous. Even Leigh was wasting time on manual data entry instead of working on other priorities.



“We did a lot of manual entry,” she explains. “We still had no way to get our wholesale information processed easily through any channels. We used QuickBooks for accounting and I’d be there for 15 hours at the end of each month manually trying to get the books closed! We also didn’t have the ability to see real time financial data which made it really difficult to run the business.”

Tracking inventory across multiple factories and 3PLs

Caskata lacked central visibility into what was happening across its new manufacturing and outsourced 3PL sites. Without seamless connection between the locations, they couldn’t identify issues fast enough or be as proactive as they wanted.



Leigh explains, *“When we started dealing with factories and 3PLs, the importance of having really good, efficient systems and simple-to-use processes became even bigger for us. We needed big picture information in one place, so we could prepare for any supply chain or cash flow issues in good time.”*

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“We needed big picture information in one place, so we were prepared for any cash flow issues that we might be facing.”


Solution

Centralizing and automating operations

Caskata wanted to bring its order and inventory management into one centralized hub, enabling them to oversee and optimize their operations with a seamless connection to their accounting solution. First, they tried Fishbowl, but found “the integration process extremely costly”. Then they tested NetSuite, which wasn’t a good fit either.

Leigh says: *“We found NetSuite too big, too complicated, and too costly.”*

After two disappointing experiments, they hit the jackpot with Extensiv, a comprehensive omnichannel fulfillment solution.




Leigh says: *“Extensiv offered high functionality with a cost that’s manageable for a small business like ours.”*

Inventory and order management centralized

Initially, Caskata brought its process for managing Shopify and other D2C orders on to Extensiv. Once those workflows were established, they moved to integrate wholesale orders.

For the first time, Caskata felt confident to implement EDI connections with large wholesale partners. With EDIs configured, Extensiv automatically populates orders into the system. This improves order accuracy, reduces the time between order and fulfillment, and improves relationships with key customers.

With all orders managed from one central hub, Caskata has total visibility, insight, and control.



Leigh says: *“A typical day now sees orders flowing nicely into Extensiv from Shopify. There’s a bit of manual intervention for the EDI, but nothing like it was before. Orders flow automatically to our 3PL and items that are shipped are updated back into Extensiv and back up to Shopify or the EDI channels. It’s a huge improvement for us.”*

Seamless connection with factories and 3PLs


Extensiv provides the seamless, omnichannel connection that Caskata needs across multiple factories and 3PL partners.

Using easy-to-read dashboards, they know exactly what’s being manufactured, what’s in their warehouses, and what’s en route to customers. Having the ‘big picture’ at their fingertips enables Leigh and her team to optimize stock levels and fulfill more orders.

Managing finances faster with QuickBooks integration


Extensiv proactively looks for ways to help its customers reach their full potential. So when they heard that Caskata was wrestling with manually inputting their financial data and inventory information into QuickBooks, they wanted to help.

Extensiv was already developing an enhanced integration with QuickBooks and asked Caskata to test the product before its release, and validate its functionality and value.



Leigh says, *"I was really happy that Extensiv asked us, because we're quite a small fish compared to many of their customers. It showed that Extensiv cares about actually understanding and validating our pain points."*

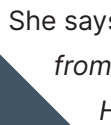
The accounting integration is a game-changer. Now, everything from inputting purchase orders to raising invoices and tracking sales and cash flow is automated, saving Leigh time and stress.



She explains, *"The integration will take hours out of month-end for me. All of our POs are reconciled and our bills are reconciled. With the integration in place, we will be using Extensiv for probably 80% of our daily business processes."*

Confidence in their numbers and analytics to act upon

Beyond efficiency gains, Extensiv uncovers insights that help Caskata further improve the business. Key metrics are summarized into dashboards that help Leigh predict demand for products, purchase the right amount from suppliers, and maximize their profits.



She says, *"With Extensiv, we can easily look at what our sell-through rate is for specific items and really learn from that. Before Extensiv, sometimes we wouldn't go looking for that data, because we didn't have time. Having that really good information right there at my fingertips helps to keep me focused."*




“Orders flow automatically to our 3PL and items that are shipped are updated back into Extensiv and back up to Shopify or the EDI channels. It’s a huge improvement for us.”

Results

Saving 96 days per year and improving customer satisfaction

With Extensiv streamlining order orchestration, automating financial management, and improving coordination with factories, warehouses, and customers, **Leigh gains a whole day of work back every week.**

Leigh estimates that her wider team, two full-time and one part-time colleague, saves yet another day each week. Across a 48-week working year, **Caskata’s team saves a staggering 96 days a year!**




She said: “We’ve taken a little bit of the complexity and the guesswork out for our employees. We’re not making as many mistakes as far as running out of inventory, back ordering, and financial billing. In the absence of those issues, we free up so much time.”

Scaling without hiring

With Extensiv in place, Caskata has something most online sellers dream of having; a system that allows them to scale without hiring more people.

Without Extensiv, they’d need to make at least one extra ops hire, so they’ve already saved tens of thousands of dollars.





Leigh explains: *“The ability to keep our team as small as possible is really important to Caskata. We depend on Extensiv to help us complete our day-to-day work more efficiently. This frees up our resources to strategically retain and recruit the talent we need to grow our business.”*

Happier, more loyal customers

With Extensiv helping Caskata forecast better and optimize stock levels, the company improves customer satisfaction and their lifetime value.


Leigh says, *“We are in stock with more items for longer periods of time. This bleeds through to the customer service. We’re providing a better shopping experience for them, because we have what they want.”*

The tool and team to transform your online business

Caskata appreciates the team behind Extensiv, who know logistics inside out and listen to what customers need.

Leigh said, *“Oh, they’re great. They’ve come from various ecommerce brands and bring a lot of good knowledge to the table. It is evident at every meeting that the Extensiv team take their work seriously, enjoy their jobs, and care about their customers.”*

Leigh recommends Extensiv to online sellers who are looking to consolidate fragmented data and grow more efficiently.



She concludes, *“If you want an affordable but robust solution to the issues and day-to-day processes for running a small-to-mid size and even large business, Extensiv is a solid choice. All the valuable information to run the day-to-day operations and to make long term decisions for Caskata is at our fingertips.”*

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Automate workflows and maximize profits

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