Pacific Valley Dairy in Pacific, Missouri makes summer a little sweeter for its clients and customers—with ice cream! As a producer and distributor of ice cream mixes, cones, toppings, sundae dishes, and a variety of other supplies needed to run an ice cream parlor, things can get a little sticky without a way to keep track of everything needed to run the business successfully.

**BUSINESS CHALLENGE & NEEDS**

With 400 locations throughout the Midwest, and as far south as Florida, a way to manage and track the company’s raw materials, finished product, and distribution to those locations was a logistical problem they needed to solve to efficiently manage their business. Pacific Valley Dairy needed an inventory management solution to enhance its QuickBooks accounting system which couldn’t solve the problem alone.

Since the company’s inception three years ago, the company has used QuickBooks to manage its day-to-day business. They quickly realized however, it didn’t have the capabilities to manage the company’s inventory and distribution requirements.

“When we acquired the business, QuickBooks was already in place,” said Randy Schiefer, accounting manager for Pacific Valley Dairy. “At first, everyone thought it would be enough, but as it turned out, when we started getting into the operations of the business, it wasn’t. We needed something stronger that would integrate well with QuickBooks.”

**RESULTS:**

- Streamline management of production and distribution
- Easily and efficiently track inventory across hundreds of locations
- Timely and accurate invoice management
- Advanced QuickBooks software integration

**THE SOLUTION**

To solve the problem, Pacific Valley Dairy called on Fishbowl to streamline the business process and manage the inventory control of sweet treats.
raw materials, production, finished goods, distribution, and sales. The company utilizes 12 Fishbowl users.

“Fishbowl pretty much runs our whole business,” said Schiefer. “You can’t spend hundreds of thousands of dollars on a new system. A small company like ours can get Fishbowl to do a lot of the important stuff for us.”

Pacific Valley Dairy deals with a large number of different raw ingredients needed for the production of the ice cream mixes. With Fishbowl Manufacturing, they have been able to create separate categories for the raw ingredients, which makes it easier to track the use of each ingredient for finished products.

“On the production end, we have a list of raw ingredients and a bill of materials in Fishbowl Manufacturing for each different ice cream mix we produce. On each production date, we create a work order for each batch we are producing,” said Schiefer. “The raw ingredients are tracked and released to production and when completed the finished mixed product is added to the inventory as a finished good. Fishbowl keeps track of everything for us. It actually works real slick.”

THE RESULTS

For the distribution end of the business, Fishbowl makes getting the company’s finished products to its store locations efficient and easy.

“One of the things we do is distribute a lot of product on our own trucks. Each truck goes on specific routes with anywhere from 20 to 25 store stops,” said Schiefer. “With Fishbowl, we’ve been able to generate pick labels from our warehouse. The pick labels are printed out in the order of each stop—the last stop is printed first so the product is pulled first and packed in the back of the truck. This continues until the truck is loaded back to front, or first stop to last. This makes loading and unloading the trucks very easy.”

Dealing with multiple locations and different business types also created problems with invoicing. Pacific Valley Dairy uses Fishbowl to create separate categories for its different pricing structures, making it easier to properly invoice each business, and manage account receivables for each.

“We have a lot of different pricing structures for our customers, and each chain has its own pricing scheme,” said Schiefer. “With six to...
eight different pricing structures, we’re able to manage the different stores and locations with the pricing structure they are using. This has worked well.”

“Fishbowl Manufacturing has really been great in helping us manage our business, and I would recommend it to anyone looking for an enterprise level inventory management solution.”

With Fishbowl Manufacturing, Pacific Valley Dairy has been able to take control of its business by efficiently managing its raw ingredients, production of finished goods, improving and streamlining distribution to its 400 + stores, and making sure invoices are correct and timely. Something they couldn’t have done with QuickBooks alone.

ABOUT FISHBOWL

Fishbowl’s business automation platform is the No. 1 requested manufacturing and warehouse management solution for QuickBooks users, and it is also a popular standalone solution for organizations or enterprises looking to track assets. For QuickBooks users, it provides the same advanced features and flexibility larger organizations enjoy, but at a fraction of the cost.

Sign up for a personalized product overview by calling 1.800.774.7085 ext. 2 or visit our website at www.fishbowlinventory.com