Renowned Tea Manufacturers Achieves Improved Inventory Management, Costing, and Production Processes Functionality with BatchMaster for QuickBooks

TeaAroma, Inc. gains lot tracking and explosion, BOM processing, industry compliance, and food manufacturing features for continued growth.

Customer Success Story:

TeaAroma

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> The ability to integrate BatchMaster with QuickBooks was essential for us. We didn't want to lose familiarity with QuickBooks, but we needed the advanced manufacturing capabilities of an industry-specific ERP. BatchMaster gave us the best of both worlds.
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> **Logan Moon**
> Senior Accounting Manager
> TeaAroma
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OVERVIEW/INTRO

TeaAroma, Inc. was founded in 2003 as the exclusive distributor for Dong Suh Foods Corporation, bringing the well-known Maxim brand and Dong Suh Korean teas to the North American market. They ran on QuickBooks, but as the company grew, it needed industry-specific functionality such as batch processing, lot traceability, compliance, and packaging management, which QuickBooks was missing. They chose BatchMaster Cloud ERP for QuickBooks to have the advanced manufacturing capabilities needed and to continue using QuickBooks for accounting.

CUSTOMER	TeaAroma
INDUSTRY	Food and Beverage
LOCATION	Carson, CA
PRODUCT	BatchMaster Cloud ERP for QuickBooks

KEY RESULTS

- Real-time insight into accurate inventory levels and raw materials ensures immediate responses to customer inquiries and eliminates manual counts.

- Improved costing with transparent cost tracking across stages of production, including accounting, for material losses in roasting processes.

- Faster, informed decision-making with automated, real-time reports replacing manual, error-prone calculations, improving inventory and pricing decisions.

- Strengthened quality control by tracking third-party lab tests to trace issues quickly and ensure compliance.

- Seamless integration with QuickBooks for real-time data transfer and elimination of manual entry, ensuring accuracy and streamlining financial processes.

- Greater control of each step in production, an understanding of BOMs used, and all process costs get calculated automatically.

CHALLENGES

The food distributor and manufacturer faced significant operational challenges. It used QuickBooks but needed help with tracking inventory, costing, and overall visibility into its production processes. Upper management at TeaAroma recognized the company's need for an ERP system.

Senior Accounting Manager Logan Moon's experience with Fishbowl and NetSuite made him the ideal candidate to guide them through the selection process. When Moon joined the company, it wasn't using key metrics, like how much raw material was used at any given time. Decision-making was complex due to the lack of precise data, and manual calculations for production processes were time-consuming and prone to error.

The company needed an ERP solution to address these pain points, which could provide the functionality that QuickBooks lacked, such as batch processing, lot traceability, industry-specific compliance, and packaging management. They also wanted their ERP to integrate seamlessly with QuickBooks, which they wished to retain because of its familiarity and ease of use.

SOLUTION

With three critical criteria—finding a web-based, food industry-specific ERP system that can integrate with QuickBooks—Moon began searching for a suitable ERP from three options: Fishbowl, Wherefour, and FoodLogiQ. They also looked at NetSuite and SAP.

While Fishbowl was familiar to Moon, it didn't have a web-based solution, was light in its manufacturing capabilities, and didn't specialize in the food manufacturing industry. Moon didn't like Wherefour's limited costing and calculation methods, and it didn't have industry-specific food manufacturing features. And FoodLogiQ had limited costing capabilities.

Moon looked at the records from a previous ERP search TeaAroma had records from and saw SAP, NetSuite, BatchMaster, and other options. After talking to each company and seeing their demos, he eventually narrowed it down to three choices, with BatchMaster as the clear leader.

BatchMaster was web-based and stood out for its ability to handle complex food production needs, including BOM processing, lot tracking, and quality control, all of which were critical for the business. TeaAroma imports and exports goods, produces roasted nuts, and repackages beans and rice onsite. BatchMaster could handle all of its order processing plus production.

It also had many explosion features that allowed the company to track costs across its processes in detail, which the company loved. Notably, BatchMaster's integration with QuickBooks enabled real-time data transfer whenever an order closed, eliminating the manual data entry that was causing them delays and errors.

When Moon presented his findings, TeaAroma's upper management group agreed with his choice of BatchMaster ERP.

BENEFITS

Now that BatchMaster is deployed, the company is much more efficient, spending less time understanding its production costs. Moon has noticed a significant difference in reduced time spent to obtain accurate information.

"Now, when customers ask us, do you have this much for purchase? We can give them an answer right away," explained Moon. "Before BatchMaster, it would take us one to two days to figure out."

ACCURATE INVENTORY

They now have real-time insight into inventory levels and raw materials, which was previously impossible with QuickBooks alone. At the end of each quarter, they used to have to walk the warehouse and count everything, then calculate from whatever the last count was. It was time-consuming and inaccurate, and there was no way to audit.

With BatchMaster, TeaAroma ensures its inventory is always correct so staff can confidently answer customer inquiries immediately.

COST ACCURACY AND TRANSPARENCY

BatchMaster's ability to track costs at every stage of the production process has been invaluable, particularly for its nut roasting, where moisture and oil loss can affect the final product weight.

Peanuts are purchased in 44,000-pound batches and sent out for blanching. When they return, there is another weight difference. BatchMaster can indicate any weight changes and factors in landing costs or other expenses to estimate the cost of goods sold accurately. "BatchMaster's costing features are a game-changer for us," stated Moon. "In food production, every ounce of weight loss during roasting affects the final product's cost. Now, we can track it all down to the smallest detail."

IMPROVED DECISION-MAKING

Reports that used to take hours to compile manually are now generated quickly and with greater accuracy, allowing decision-makers to know what inventory to buy and when and how to price goods sold, which helps them improve customer satisfaction. Real-time information is immediately at their fingertips. "We've got the data we need to price competitively, Moon stated. "BatchMaster's ERP system has been instrumental in helping us streamline our operations to grow faster."

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Manufacturing

BATCHMASTER®
Process Manufacturing Software

QUALITY CONTROL

The company heavily relies on BatchMaster's Quality module, which tracks third-party lab test results for its imported and exported goods. Due to the nature of the food production business, it is critical that they can find any issues immediately and track them back to the source.

"We heavily rely on BatchMaster's Quality module to track third-party lab tests for all our imports and exports," explained Moon. "If there's a problem, we can trace it immediately—there's no guessing."

SUPERIOR SERVICE

Moon said that the implementation team's speed and support level were superior to any other ERP he has worked with. He also complimented the customer service team he began working with after transitioning from the implementation stage.

Overall, he rated the experience a 4 out of 5, noting that while training non-ERP-experienced employees can be challenging, BatchMaster provides the functionality needed.

SEAMLESS INTEGRATION WITH QUICKBOOKS

One of the key criteria for TeaAroma is that the ERP they chose could integrate with QuickBooks. BatchMaster ERP for QuickBooks provides a seamless integration experience with immediate transfer of information from one system to the other, so everyone is always working from accurate data. In Moon's past, working with FishBowl didn't provide visibility to the data in QuickBooks, and vice versa.

SET FOR GROWTH

Thanks to BatchMaster, TeaAroma is positioned to continue growing its business, armed with the data and operational efficiency needed to make smarter, faster decisions. "The ability to integrate BatchMaster with QuickBooks was essential for us. We didn't want to lose familiarity with QuickBooks, but we needed the advanced manufacturing capabilities of an industry-specific ERP. BatchMaster gave us the best of both worlds."

Their integration with QuickBooks ensures they can maintain the financial system they're comfortable with while leveraging BatchMaster's ERP capabilities to optimize their cost tracking, production, quality, and inventory management.

About BatchMaster Software

BatchMaster Software is a leading provider of ERP solutions that help emerging and growing formula-based manufacturers streamline their operations and scale production while reducing costs and complying with changing customer demands and ever more stringent regulatory mandates. The company delivers industry-specific solutions for Food, Beverage, Nutraceuticals, Pharmaceuticals, Cosmetics, Chemicals, and other process industries. BatchMaster ERP is seamlessly embedded within SAP Business One, providing a comprehensive process manufacturing solution that is available on-premise and in the cloud. BatchMaster Software has served the process manufacturing market for over 30 years and supports thousands of customers worldwide.

BatchMaster Software

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