

# BV Dairy

## BV Dairy Unleashes Growth With Epicor ERP and DocStar



### Company Facts

#### Overview

- ▶ Location—Blackmore Vale and Shaftesbury, Dorset, United Kingdom
- ▶ Industry—Dairy and Food Processing and Manufacturing
- ▶ Website—[www.bvdairy.co.uk](http://www.bvdairy.co.uk)



### Success Highlights

#### Challenges

- ▶ Lacked an ERP solution that could scale with the company's growth
- ▶ Needed to automate routine tasks in order to upskill staff and boost efficiency and accuracy

#### Solution

- ▶ Epicor® ERP
- ▶ DocStar® ECM

#### Benefits

- ▶ Provided the company with an integrated ERP and document management system to help support their 10% annual growth targets
- ▶ Allowed for customization to fit and drive workflow requirements
- ▶ Automated tasks to save staff more than 10 hours of extra work per week

Founded in 1958 as a family farm in England's West Country, BV Dairy is now a thriving modern business. Each year, the company purchases 35 million liters of milk from dairy farms within a 25-mile radius of their production facility in Shaftesbury, Dorset and turns them into dairy products for food distribution and manufacturing firms. BV Dairy's range includes their award-winning Dorset clotted cream, as well as yogurts, buttermilk, soft cheese, and mascarpone.

#### The challenge

BV Dairy is committed to ongoing annual growth of at least 10 percent, and they're keen to secure new market share and explore new product ideas. To continue their growth journey and to help their team meet these targets, the company wanted to expand their use of the Epicor enterprise resource planning (ERP) solution.

The company had already been using Epicor ERP for some time, as they initially started using the solution for financial processes. However, as BV Dairy continued to grow, ERP systems manager Mark Damen wanted to extend the use of Epicor ERP to optimize efficiency and outputs.

BV Dairy had started to integrate multiple processes with Epicor ERP—including label printing, traceability assurance, customer data exchange, and more. As a next step in the company's technology evolution, Damen decided to add content management capabilities, and the search was on for the most suitable solution.

## Choosing the best candidate

Damen had seen the DocStar enterprise content management (ECM) product demonstrated at several Epicor user group events, and he had been impressed with the ease of integration with the Epicor ERP system.

Due diligence is vital for any business, and BV Dairy thoroughly assessed four potential solutions. However, DocStar stood out from the crowd because of its capabilities and integration simplicity.

The system integration took around five months, because BV Dairy was among the first in the UK to implement DocStar, so they had to work remotely with the DocStar team in the U.S. The time differences created some scheduling problems, but the system was successfully set up and is now live.

## Quick results

DocStar proved its worth very quickly by yielding tangible benefits in the accounts department within the first few weeks. One of BV Dairy's main requirements from the new system had always been to automate mundane tasks so that the staff who had previously undertaken them could focus on processes that would add value to the business—including analysis, forecasting, and reporting.

Almost immediately, DocStar freed up time in the accounts department—releasing staff to perform more complex tasks and thus help fuel corporate growth.

“We noticed the benefits of DocStar almost immediately in our accounts department. Automation gave staff time to do more—such as helping budget holders to process invoices. It really made a difference very quickly,” Damen added.

The benefits of DocStar were also quickly felt in other administrative processes. Previously, staff had to manually sort the hundred or so delivery notes received daily—arranging them into numerical order and logging them as having been signed. The integration with DocStar has drastically reduced the time needed to do this by around 10 hours per week.

Accuracy in this field is a KPI for the company. Under the new system, when the delivery notes are scanned in, the system picks up the document number automatically, cross-references it to check validity, marks it as received, and stores appropriate information in both the ERP and DocStar systems to permit cross-referencing and searching from each. Damen described this change as “revolutionary.”

“DocStar also takes some of the decision-making out of processes, because it checks that documents have been received and/or approved and passes them through automated workflows as appropriate. If there's an issue with an invoice—for

example—DocStar can automatically route it back to the budget holder,” he added.

## Customized solutions

When asked to name the best features of BV Dairy's current integrated system, Damen is quick to respond. “With Epicor ERP, there's a lot of base functionality straight out of the box, but the ability to customize and tailor processes within is what makes it really powerful,” he said. “For example, we have built an updateable dashboard and then customized it for our job receipt inventory. As a result, a job that used to take three steps—and three screens—in Epicor is now down to a single button while still honoring all of the business rules in the system.”

Have there been any issues? “Not really,” said Damen. “We did notice how different the DocStar interface is from that of the ERP system, but it's still very easy to use. Since implementing workflows, it's night and day different—it just works now.”

## Looking ahead

Having integrated DocStar with Epicor ERP, the staff at BV Dairy are delighted, and the company remains committed to their path of constantly updating the solution and integrating DocStar workflows throughout the business.

“DocStar gives us the power to add and retrieve more documents to and from the system, and this is an area that holds great

**“We are in a price-driven market, and having all of our costing information available to view in a comprehensive and organized way makes all the difference. It helps us to stay competitive because we always have an overview of our costs, which means we can continue our growth journey.”**

Mark Damen, ERP Systems Manager | BV Dairy

potential for us,” Damen added. “It increases our accuracy, efficiency, and traceability. Furthermore, this solution has plenty of flexibility that lets us tune and tweak workflows as our business processes change and grow. Most of all,

the introduction of DocStar has allowed us to streamline processes and save time—notably in terms of invoice approval and delivery note processing—because it brings all of the relevant information and documentation together in one place.”

Finally, does BV Dairy foresee any impact on the company’s bottom line, even this early on in the implementation process? “Yes,” said Damen, unequivocally.

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