Old World Charm, New World Technology

By Misty Heydens
Director of Implementation

Minerva Dairy is known as "America's oldest family owned creamery," churning out artisan butter and cheese since 1894. In small-town Minerva, Ohio, 5th generation owners Adam Mueller and Venae Watts produce large block cheeses, and high quality, slow-churned butter made with sea salt and milk from pasture raised cows. Their cheese and butter are made under the same roof.

Product

Their cheddar, parmesan, and sometimes Colby, are produced in 42 lb. blocks intended for further processing and private labeling. They cater to special customer requests, such as performance or salt content. Material receipts and production are geared toward these requirements.

Butter is Minerva Dairy's highest produced item, coming in multiple flavors. The butter is sold mostly to distributors. Their product is 85% butterfat, creating a higher end product than standard butter.

Why Canopy?

Minerva Dairy implemented Canopy, along with Data Capture scaling, labeling, and scanning in just five months from contract signing to go-live. Canopy was live in the facility in April 2017.

Venae shared, "I like that Aspen has a small company touch but still has the resources to fulfill our needs. We don't have to wait 20 years for a return call for assistance. You're able to talk to the same people you've become familiar with."

History

Minerva Dairy replaced an antiquated custom system that was no longer going to be supported. Adam's five-year plan was to get ahead of the industry by choosing an ERP system that would meet their future requirements. He stated, "Canopy doesn't cost as much as SAP or Oracle. Cost was a big factor for us. SAP markets as a one stop shop, but Canopy was really able to meet our needs."

Canopy provides efficiency of tracking inventory and production in real time. Data for packaging needs is easily retrieved instead of sending someone to the warehouse to hand-count. Event Watch sends alerts for preventative information, like what might happen down the line. An abundance of reporting tools allow them to look back at historical information to plan future production. "We're able to make a more educated guess based on normal patterns so we don't over produce. We can now better budget and plan for our production needs."

Adam also stated, "It's easier to see where our costs are now and where our profit lies with each product. We can make smarter decisions with what we should be charging."

Venae added, "Having real numbers is surprising, where with our best guess we might think the value was higher or lower."

Canopy helps track down inventory to pull for the different production lines. In-depth reporting shows how many weeks of materials are left for production. "They now have more confidence in the numbers they find in the system." Canopy also helps them effectively communicate with customers, and allows them to manage a more expanded line of product SKUs. They are also providing more transparency for their customers. Their customers immediately know the answers to: What do I currently have in packaging? *(the customer supplies their own packaging)* and What's being produced in the coming weeks?

Minerva Dairy's product pricing heavily relies on the CME *(Chicago Mercantile Exchange)* markets that are traded daily. Their product prices are based on the weekly CME average, and they price out to four decimal places. Venae said, "It's a number that's changing all the
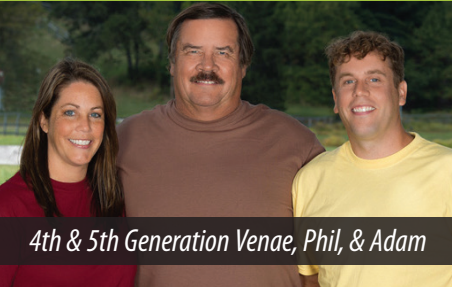
HOW IT STARTED...

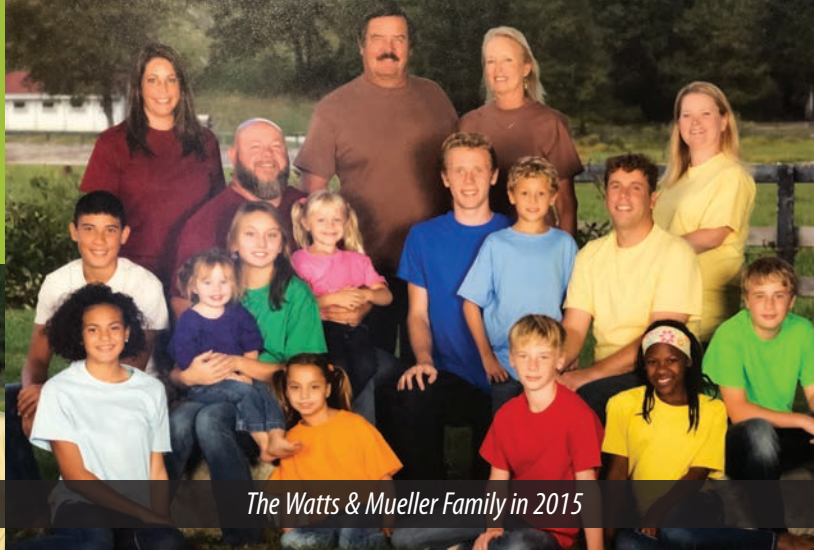*Max and Martha Young with their children in 1910*

Cheese Workers in 1938

4th & 5th Generation Venae, Phil, & Adam

The Watts & Mueller Family in 2015

Rolling Butter in 2019

time. It was a game changer in our industry to get this specific pricing. Canopy already had tools in place for our specific pricing needs. We just need to bring in the market pricing and it flows to the customers automatically. We don't have to manually key it in. With Canopy's Bulk Cost Update and Product Cost Transfer tools, it took the pricing out of the salesperson's hands and moved it to the accounting group to manage, where it should be."

Terminal Input

Minerva Dairy's cheese packaging line is fully automated, with in-motion packaging, weighing, labeling, and palletizing. Once the cheese passes through the automated packaging system, Terminal Input registers the weight, which produces the serialized box label for a label applicator, which then moves to the palletizing robotic arm. Another Terminal Input station is used at the palletizing area for the packaged butter.

They are using Custom Lot Codes to record the lots and skids that are reserved for a specific customer, and their Pallet Balance Report *(through Aspen View)* displays the items currently reserved.

Canopy is a perfect fit for their needs in the Dairy industry. So much that they had very little need for customizations. Automatically sequencing and recording the production vats for finished products was mainly their only customization need system wide.

Implementing EDI

Minerva Dairy is currently working on implementing EDI. They trained with Aspen on EDI mapping and now plan to map the rest of their EDI customers on their own. Mapping the EDI documents saves them tedious manual entry on the EDI website. Implementing EDI not only allowed them to acquire new customers who had EDI requirements in place, but automating more of their daily processes also provides the ability to work remotely. Their phase two plan is to eventually move to working with EDI vendors.

Event Watch

Event Watch was implemented near go-live. Their first notification was to monitor low inventory for cheese, so they would know what to produce. Making cheese is not an overnight process. They need several days of advance notice when on-hand inventory starts to get low.

In addition, they have notifications in place for low inventory for packaging and other ingredients, like salt. They also receive a notification when Adam rejects AP invoices through the AP Invoice Approvals in Canopy.

They even implemented a notification for their Kosher orders. When a Kosher order is placed, Event Watch sends a notification to the rabbi so he can schedule to come in for production.

Scheduled Reports

Minerva Dairy uses Canopy's Scheduled Report tool for internal report scheduling, along with scheduling specific reports to send to customers. A report is sent to customers letting them know what packaging is left in the building, and what inventory has been produced and is available. When the inventory gets to a full truck load, the customer can schedule a truck for pick up.

Other examples of scheduled reports:

- POs that haven't been received, based on the expected date
- Inventory over 90 days – aged inventory
- Pallet Balance Report for sales, for inventory that needs to be sold
- Open – unfilled orders
- Product On Hold Report
- Product Short Report, which helps with sales and production planning
- AR Outstanding Report

Minerva Dairy also plans to use Canopy's Pulse dashboards, which will display throughout the facility, reflecting scheduled production and scheduled customer shipments for the day.

Aspen View

Minerva Dairy is currently using Canopy's Aspen View report writer for reports where, "there might be one item that wasn't an option in the standard report, or where there was too much information in the standard report."

The Pallet Balance Report they are currently sending through Scheduled Reports is an Aspen View. Most of their Aspen View

reports were written by their controller, Jen Stuller, who hopes to attend a future Aspen View Workshop to expand her reporting skills for further use with Event Watch and Pulse.

Jen mentions she gains some of her ideas from the Aspen Forum, "I read the New Release Highlights. I also get email notifications on content I'm following. I read some of the posts and think, 'Yeah, I could do that.'" She's also using system shortcut commands in most screens when navigating Canopy. She recently started to build Access Codes through her customized Canopy Menu for even quicker screen access.

> "It feels like I've just scratched the surface of what the system can do. We went in thinking we could do X, Y, and Z and soon realized we can do the whole alphabet. It really feels like we are only using about 50% of what's available in the system."

With the Aspen View report writing tool, access to the Aspen Forum, and training from Aspen, they have become fairly self-sufficient. Minerva Dairy also performs their own Canopy upgrades. Aspen's Client Solutions staff trained Jen while recording the training session, and provided the video for her first solo upgrade.

Document Imaging

Minerva Dairy heavily relies on Canopy's digital Document Imaging tools. Jen Stuller said that Document Imaging is, "literally the greatest thing that ever happened to me. We just scan and toss."

Jen's office used to be filled with filing cabinets. Since implementing Document Imaging, so much room has been opened up that they moved and repurposed filing cabinets into extra storage space for non-paper items.

Scanners are placed throughout the facility so that each department can scan their own documents.

"Everything is scanned!" Currently they are electronically storing miscellaneous product documents, MSDS sheets, contracts, certificates of insurance, cash receipt checks, PO receipts, AP invoices, and vendor statements. The 'Vendor Document' type is used for random vendor paperwork.

Shipping documents are now easy to locate, including BOL, shipping manifests, COA, and EU certificates *(European Union)* showing the milk in their products meet certain standards.

They also store GL related backup documents, such as journal entry documents for loan payment paperwork, which makes reconciling a breeze.

One of their goals is to expand usage of other types of documents, like product specs, and milk tickets, where it would be mapped to what farm it's for, and the date. Another upcoming project is storing farmer payroll reports. When the farmer calls in for the pay stub, it could be emailed directly from Canopy to the email contact stored in the system. The document type would be mapped based on the farmer ID number. They plan to send the pay stubs automatically on a specific schedule via Event Watch to save even more time.

Minerva Dairy is currently working on expanding their butter production in a way that essentially doubles it, to include an entirely new butter production area. Today, they have a 6th generation working at the dairy. Each generation starts with rolling butter. When they show interest in a certain area, they move to that area to focus on their niche, like maintenance, lab, marketing, or unloading the milk trucks in the intake/milk receiving area. Paige, Venae's daughter, even worked on digitally recording 1st generation Max P. Radloff's handwritten memoirs from the 1800s.

Venae shared, "It feels like I've just scratched the surface of what the system can do. We went in thinking we could do X, Y, and Z and soon realized we can do the whole alphabet. It really feels like we are only using about 50% of what's available in the system."

Minerva Dairy is constantly implementing new tools in Canopy in order to improve their processes. Their new five-year plan is to utilize the system to the best of its ability. "We don't need new software. We have much more room for growth. We have yet to outgrow Canopy."

Adam Mueller   *Venae Watts*   *Phil Mueller*

Minerva Dairy is America's oldest family owned creamery since 1894, and is currently under operations by their 5th Generation