



## Microsoft Dynamics NAV Keeps Terrybear Urns & Memorials on the Leading Edge of Technology



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**Fran Bistodeau**  
Director of Operations  
at Terrybear

Terrybear is the leading source for beautiful, handcrafted cremation urns and memorials. Since 1983, they've established worldwide manufacturing capabilities in order to provide their clients with the best designs and best pricing for their urns and keepsake memorials. Distributors, funeral homes, families, and pet owners recognize and trust the Terrybear name for quality, beauty, value and professional and courteous customer service.

Terrybear continually invests in new urn designs, quality improvements and technology. That technology investment also extends to the systems they use to manage the business. As their business has grown, so have their accounting and manufacturing software needs. As a long term Business Automation Specialists of Minnesota (BASM) client, Terrybear has stayed on the cutting edge of their business management technology with the help of BASM.

According to Ron Ketterling, BASM President, “Terrybear is always in the process of reinventing themselves, recognizing that the market is always changing. They are willing to challenge the status quo to meet the needs of their customers. They also have a solid mechanism in place to streamline communication and implement change.”

When it became apparent that Terrybear was outgrowing their accounting system, they turned to their trusted advisors at BASM for guidance. Since their initial software system re-engineering, on a solution that served them well for six years, Terrybear has tripled their staff to accommodate a changing business model.

In addition to needing to replace their current system, Terrybear wanted a solution which included integrated CRM with sales lead tracking so all processes could be managed in one system. They also needed a way to integrate outside shipping information (such as FedEx and UPS) into their

# Case Study

The right mix of technology and practical business experience.

accounting and warehouse management software to streamline the process and eliminate duplicate data entry. Fran Bistodeau, Director of Operations at Terrybear stated, “We needed to automate and integrate our systems so everything resided in one place for better visibility, reporting, and to be able to make more informed decisions.

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After a thorough needs and business process assessment, and after looking at a number of solutions, BASM and Terrybear agreed that Microsoft Dynamics NAV would be the best fit for Terrybear’s current needs and would be able to grow with them as their needs change. “Terrybear’s change management team, including product development, sales, purchasing, accounting, warehouse, shipping, and senior management, did an impressive job of identifying needs ahead of

time,” said Ron at BASM. “This makes our job so much easier and efficient when the customer knows exactly what they need and want.”

John Bale, CFO of Terrybear stated, “The implementation and data conversion process went better than we expected. In fact, the day of the conversion we were invoicing and shipping. Business was not interrupted in any way, and there was little to no impact from the customer side. Within two weeks of implementation we were back up to speed to where we were with the prior system. Training by BASM was a key factor to the implementation success and having their team on-site those first few days really made a difference.”

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**John Bale**  
CFO at Terrybear



## **BASM was able to set up the Microsoft NAV solution to streamline processes while working with the way Terrybear operates and how they make profitability decisions, including:**

- **Printing Automation of Order Dependent Packing Slips.** Sped-up the shipping process by automating the printing of order dependent packing slips: Commercial Invoices, Blind Drop-Ship, Special Branding, and General. Now the right document goes with the package all the time with no extra effort required.
- **System Classifications.** Classifications were added to the account system to provide the level of detail for reporting needed to make financial decisions and to assist in product trending analysis.
- **Container Management.** BASM created a process to allow Terrybear to update quantities, delivery dates, and costs on purchase orders. It also allows them to designate a line on a PO as part of a container, enabling Terrybear to sort by container. Additionally, each container may include several invoices for several vendors. Now, they can sort by container number and invoice number.
- **Delivery Status Fields.** Accurate delivery information is extremely important but is complicated with average lead times of four months or longer. By incorporating a delivery status field (i.e. ordered, in production, customs, on water, ground transportation) customer service reps can keep customers informed of delivery dates in real time. This also allows the sales team to know true availability so they don't over sell.
- **Special Order Handling.** Personalized and other special orders are now able to be identified. They get picked first and separately, so they can be shipped out the same day.
- **Product Lifecycle Management.** A product lifecycle system was implemented to capture development costs by product line: as well as status updates tracking initial drawings, approvals, changes, color samples, management process through development to production and end of lifecycle.
- **Quality Control Process.** The quality control process, which used to be spreadsheet-based with significant manual work, was revamped by BASM. Products are largely handmade which can result in discrepancies. The new inspection rate in the receiver document helps prioritize inspections based on a number of weighted factors to indicate what to inspect first based on priority. Additionally, some products may be gift packaged versus in a cardboard box, with additional kitting needed for those. The extensive quality control process needed for custom products, including private labeling and custom packaging, is now automated.
- **Integrated Freight Shipping.** The system eliminates UPS WorldShip and FedEx Ship Manager, and will automatically choose the most economical carrier, or the user can choose the carrier and service as needed. Freight charges based on Terrybear's rules are automatically added to the Sales Order along with tracking information so that anyone in NAV can track a package. The system can also create blind shipping labels so Terrybear's name doesn't show if drop shipping.



While Terrybear is saving significant time on order processing and shipping, the biggest advantage according to John is that, "Access to information is now at everyone's fingertips. This positively impacts all areas of the company so everyone can do their jobs better. The Reporting capabilities and the built-in list of available reports in NAV is impressive. With this system, we will always be able to grow, will always be on the cutting edge, and the system will be able to grow with us."

Fran added, "The time savings for order entry alone is immeasurable. It used to take all day long to process orders – especially on Mondays. Now we can do it in a matter of a few hours. This has allowed us to add on to existing roles, so we can grow without adding staff." She continued, "It's much easier to process transactions now. Additionally, our warehouse manager is giving us glowing reviews about how much time is being saved with his staff, especially with Delivery Management. Processing containers used to take all day, now it only takes 5 minutes. The warehouse efficiencies gained mean the staff can produce a lot more, and thanks to the Delivery Management module developed for us by BASM, we won't need to hire additional staffing."

Fran concluded, "No department has been unaffected by the move to Microsoft Dynamics NAV. Those that process the most transactions – order entry and the warehouse - are seeing the most benefits. Where previously we had trouble processing 80 orders per day, we can now handle over 100 per day with extra time remaining. Additionally, the warehouse could easily double or triple inventory size as a result of these changes."

John and Fran agreed that they got everything they wanted out of the system and more. "We would absolutely do it all over again. Between Microsoft Dynamics NAV and Business Automation Specialists, we've got a winning combination!"

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Director of Operations  
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