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The CFO's Guide to Implementing a **Food & Beverage ERP System**

Discover how CFOs can enhance Food & Beverage ERP systems with AI capabilities to boost efficiency, accuracy, and decision-making.

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Introduction

As the Food & Beverage industry navigates complex supply chains and stringent regulations, Chief Financial Officers (CFOs) are increasingly turning to Artificial Intelligence (AI) to enhance Enterprise Resource Planning (ERP) systems. Notably, 85% of surveyed executives anticipate AI will significantly impact ERP processes within the next five years. By integrating AI into operations, CFOs can enhance operational efficiency and financial accuracy, resulting in a 30% improvement in overall productivity.

AI-driven forecasting tools within these systems can help reduce forecasting errors by as much as 50%, enabling more accurate demand planning, inventory management, and cost control. This leads to optimized production schedules and better financial decision-making in the food industry, which is known for its complex supply chains and fluctuating market demands.

Key Considerations for a Food & Beverage ERP System

Selecting the right ERP system for a food and beverage company requires a deep understanding of the unique demands of the process manufacturing category. Industry-specific requirements, compliance challenges, and operational complexity must also be considered.

Food businesses can organize operations, ensure regulatory compliance, and significantly enhance business performance by choosing the right ERP system to meet their needs. Below are key considerations when selecting an ERP system for the food and beverage industry.

Recipe and Ingredient Management

An ERP system's ability to manage recipes and ingredients with precision is crucial for food manufacturers. In process manufacturing, where exact formulations are essential, ERP systems ensure recipe tracking, ingredient traceability, and real-time adjustments to maintain consistency and compliance.

For instance, bakeries need precise dough formulations, dairy processors adjust ingredient ratios based on milk composition, and beverage manufacturers control flavors and preservatives for consistent taste and regulatory adherence.

An advanced ERP system streamlines ingredient tracking, batch scaling, and procurement, ensuring quality and cost control. Bakeries maintain consistency, dairy producers adjust to milk supply shifts, and beverage companies refine formulations. By integrating supplier data and automating workflows, ERP helps food manufacturers balance quality, compliance, and profitability in a dynamic market.

Batch Management and Lot Control

Effective batch management is crucial for tracking raw materials to finished goods across all food processing industries. The ERP system must provide traceability for quality control, recall management, and regulatory compliance.

Lot control provides an essential capability to trace products back to their origin, whether tracking an animal from farm to packing plant or tracing produce from field to processing facility. For example, in the meat industry, an ERP system tracks every batch of beef or poultry from the farm or supplier through processing, packaging, and delivery, ensuring complete visibility and accountability for food safety inspections and audits.

Catch Weight & Weighing Scale Integration

The food industry, particularly sectors like meat processing and fresh produce, often deals with products that vary in weight, making catch-weight management critical. Weighing scale integration in the ERP system allows for real-time updates on the weight of products during production and shipment.

This ensures accuracy in pricing, inventory management, and compliance with regulations. For instance, in the meat industry, each cut of meat may have a variable weight, requiring integration with scales to capture and record weights accurately for invoicing and inventory tracking. This reduces errors in order fulfillment and provides precise data for financial reporting.

Yield Tracking

Yield tracking is critical across various food processing industries to measure production efficiency, minimize waste, and optimize resource utilization. Whether in dairy, meat, seafood, or beverage production, an ERP system must accurately track the yield of usable products after processing raw materials.

This helps calculate product costs accurately and improve overall production efficiency. For example, a frozen food manufacturer may track the yield from raw vegetables, factoring in losses due to peeling, trimming, or spoilage, to optimize costs and reduce waste.

Food Safety and Compliance

The food and beverage industry is subject to strict regulations regarding food safety, and authorities such as FDA and USDA often conduct inspections. An effective ERP system helps prepare for inspections by supporting quality control and traceability across the value chain, ensuring compliance with industry standards and regulatory requirements.

These features include real-time tracking of ingredients, batch history, supplier compliance, and audit trails. For example, in a dairy processing plant, the ERP system should track milk batches, processing conditions, and expiration dates to ensure compliance with health and safety regulations, reduce the risk of recalls, and improve food safety standards.

Shelf-life and Expiration Date Management

Managing product shelf-life is essential in industries with limited product lifespans. An ERP system must handle multiple expiration date types, including 'sell by,' 'use by,' and 'best before' dates while implementing inventory methods like FEFO (First Expired, First Out) to reduce spoilage. For instance, in the dairy industry, the system would help ensure that milk or cheese batches approaching their expiration date are used or sold first, reducing waste and improving profitability.

By-product and Co-Product Management

In food processing, the production of by-products and co-products is standard. For instance, by-products such as bones, offals, or animal fat can be repurposed for pet treats or other secondary products in meat processing. Similarly, the husks and shells are considered by-products sold or used for other applications in almond processing.

An ERP system must effectively manage and track by-products, enabling businesses to optimize costs, accurately allocate production expenses, and identify revenue opportunities. With real-time visibility into inventory levels, valuation, and market demand, the ERP helps businesses repurpose by-products, reduce waste, and enhance profitability through strategic utilization and sales.

Proof of Delivery

In industries where timing and accuracy are critical, proof of delivery safeguards against financial losses, disputes, and supply chain inefficiencies. For businesses handling perishables like meat or fresh produce, ensuring timely, accurate deliveries in proper condition is essential.

In the meat industry, cattle owners and feedlots must verify that livestock arrives at processing plants without discrepancies. An ERP with real-time tracking and digital proof of delivery (POD) reduces errors and disputes.

By capturing digital signatures, timestamps, and GPS confirmations, businesses enhance logistics, traceability, and supplier accountability while improving operational efficiency.

Supply Chain Management

The global nature of food supply chains presents challenges in managing multiple suppliers, fluctuating raw material prices, and complex logistics. An ERP system plays a crucial role in ensuring seamless coordination, offering real-time tracking of raw materials and transportation logistics to maintain timely deliveries, cost control, and supplier efficiency.

In industries like processed foods, where ingredients are often sourced from different regions, an ERP system helps businesses streamline supplier management and procurement processes. If you take, a snack food manufacturer for instance that relies on spices from Asia, flour from North America, and oils from Europe must continuously track supplier performance, pricing fluctuations, and delivery schedules. With the help of ERP-driven forecasting and supplier analytics, the company can anticipate price changes, negotiate better contracts, and prevent supply chain disruptions ensuring consistent production without unexpected cost spikes or ingredient shortages.

Demand Forecasting and Planning

Seasonality, market trends, and shifting consumer preferences heavily influence the food and beverage industry, making accurate demand forecasting essential. An ERP system helps businesses analyze historical data, monitor global trends, and align production with anticipated market needs to maintain optimal inventory levels.

In industries reliant on agricultural outputs, fluctuations in global prices and unpredictable weather patterns can directly impact raw material availability. A company producing almond-based products, for instance, must account for variations in crop yields, shifting consumer demand for plant-based alternatives, and evolving export regulations. By leveraging ERP-driven analytics, businesses can adjust procurement strategies, optimize production schedules, and prevent costly stockouts or overproduction, ensuring a balanced supply chain that meets market demand without excessive waste.

Integration with 3rd Party Systems

In today's interconnected environment, ERP systems in the food industry must integrate with other third-party systems, such as CRM, warehouse management, and EDI (Electronic Data Interchange), for food manufacturers, distributors, ecommerce platforms, etc. Many food companies sell to large retailers like Walmart, Costco, or Trader Joe's, often requiring EDI (Electronic Data Interchange) for smooth order fulfillment and invoicing.

Integration with these systems helps maintain consistent and accurate data across platforms, streamlining operations and reducing errors in supply chain communication. This is particularly important for large-scale food suppliers who must efficiently manage inventory and track orders across multiple channels.

Why Conventional Food Manufacturing Software Fall Short

Conventional ERP systems, especially those designed for multiple industries, often fail to address the unique requirements of the food manufacturing industry. Traditional ERP models were built with a one-size-fits-all approach, offering comprehensive features for various industries.

However, food manufacturers often relied on third-party vendors to tailor these solutions to their specific needs. While customizations helped address some unique business processes, they also revealed significant limitations. The need for rigid customizations, lack of scalability, and poor integration have proven to be substantial challenges for the food and beverage sector. Let's delve into these shortcomings.

Limited Industry Expertise & High Cost of Maintenance

Smaller software providers catering to niche food manufacturing often lack the industry expertise and resources needed for ongoing ERP updates, bug fixes, and support. Limited development teams lead to higher maintenance costs and potential system obsolescence if the provider exits the market.

For food manufacturers in sectors like meat processing and dairy, this poses risks when adapting to evolving FDA and USDA regulations. Without reliable support, businesses struggle with compliance, operational inefficiencies, and rising maintenance expenses, making long-term sustainability a challenge.

Lack of Scalability

As food manufacturers expand their operations through multiple locations or increase production volume, traditional ERP systems often struggle to keep up with this growth. These systems are not designed to handle the complexity of scaling operations and integrating with new technologies, making it challenging to support increasing demands or adapt to changing market conditions. Scalability is particularly critical in industries like meat processing or perishable goods, where supply chains, production lines, and distribution networks need to be agile and responsive to fluctuations in demand.

Poor Integration Capabilities

Many conventional ERP systems fail to integrate easily with financial management, CRM, and supply chain platforms, creating data silos that hinder real-time visibility and decision-making.

A food manufacturer using outdated ERP software may struggle to sync inventory across production sites and distribution networks, leading to stock discrepancies and delays. For example, a bakery chain with disjointed inventory tracking may face ingredient shortages at some locations while others have surplus stock. In the perishable food and beverage industry, such inefficiencies lead to waste, production bottlenecks, and costly disruptions in shipment schedules.

Outdated User Experience & Mobility

Small-scale ERP providers often lack the resources or expertise to optimize the user interface or offer mobile capabilities. In today's fast-paced food industry, manufacturers require real-time data and access to critical information on the go.

However, traditional ERP systems often have cumbersome interfaces, are challenging to navigate, and lack mobile functionality. For instance, a food processing plant without a modern ERP system may struggle with remote access to critical production data, hindering real-time decision-making, quality control, and operational efficiency.

With mobile-enabled ERP capabilities, businesses can leverage barcode/QR code scanning to track stock in real-time at various processing stages, receive instant notifications of quality deviations for immediate corrective actions, access regulatory documents on demand, and enable employees to log shift hours and work progress remotely. These features ensure smooth operations, enhanced compliance, and improved food production value chain productivity.

Security & Compliance Risks

Security and regulatory compliance are critical in the food and beverage industry, particularly with standards set by organizations like the FDA and USDA. Large ERP providers such as Microsoft and Oracle heavily invest in maintaining compliance with evolving food safety, traceability, and cybersecurity standards.

Smaller ERP providers, however, may not have the resources to keep up with these ever-changing regulations, putting food manufacturers at risk of non-compliance. Failure to meet FDA or USDA standards can lead to costly fines, recalls, and reputational damage. Inadequate compliance features also mean critical processes like product traceability might not be robust enough to support real-time audits and inspections.

Transitioning to a Scalable, Enterprise-Grade ERP Solution in Food Manufacturing

The food manufacturing industry is characterized by unique challenges, such as managing perishable goods, stringent regulatory requirements, complex supply chains, and the constant need for operational efficiency. Conventional ERP systems often fail to address these needs, leaving food manufacturers grappling with limited scalability, outdated functionalities, and fragmented workflows.

As a result, food businesses are increasingly looking to robust, scalable ERP solutions like Microsoft Dynamics 365 and Oracle NetSuite SuiteSuccess to help them streamline operations, ensure compliance, and enhance profitability. Transitioning to an enterprise-grade ERP solution is no longer an optional upgrade. It's necessary for food manufacturers aiming to future-proof their businesses and gain a competitive edge.

These platforms are designed to address the complexities of food production and supply chain management while providing the scalability, security, and continuous innovation that traditional systems can’t offer. Below are the key reasons why adopting solutions like Microsoft Dynamics 365 or Oracle NetSuite SuiteSuccess is a game-changer for food manufacturers:

Cutting-Edge User Experience

Food manufacturing environments require quick decision-making and efficient workflows, yet many traditional ERP systems have outdated interfaces that slow user adoption and hinder productivity. Modern solutions like Microsoft Dynamics 365 and Oracle NetSuite emphasize intuitive user experience (UX) and mobility, making critical data more accessible and actionable.

In food production, real-time access to inventory, ingredient traceability, and quality control boosts operational efficiency. A warehouse manager can instantly check stock availability or flag quality issues using a mobile device, reducing delays and errors. With modern role-based dashboards, employees focus on core tasks without complex navigation, ensuring faster decisions and streamlined workflows.

Perfect Integrations

Food manufacturers rely on specialized software systems for inventory management, quality control, and compliance tracking. Microsoft Dynamics 365 and Oracle NetSuite are key advantages because they integrate easily with essential business applications, including finance, CRM, HR, supply chain management, and compliance tools.

This integration ensures that food manufacturers have a single, accurate source of truth across all departments. For example, inventory data from production can be automatically synced with procurement systems, ensuring that ingredient shortages are identified before they disrupt production schedules. By eliminating data silos, these integrations promote collaboration across departments and enhance decision-making, ultimately driving efficiency and reducing errors.

Scalability & Flexibility

As food manufacturers grow, their operations become more complex, requiring efficient management of multi-location facilities, expanding supply chains, fluctuating ingredient costs, and increasing production volumes. They must also optimize resource allocation, enhance workflow automation, and maintain consistent product quality while adapting to shifting consumer demands and market trends. Microsoft Dynamics 365 and Oracle NetSuite are built on scalable cloud-based architectures to meet the needs of the food industry.

Whether expanding into new geographic regions or adding more production lines, these platforms can scale quickly to accommodate increased volume and complexity. Their flexibility also allows them to integrate new technologies, such as IoT-based monitoring for temperature-controlled environments, ensuring that businesses can adapt to changing industry needs without costly system overhauls.

Instant Access to Analytics & Reports

In the food manufacturing industry, where perishable inventory, batch tracking, and compliance are time-sensitive, having real-time access to data is crucial. Microsoft Dynamics 365 and Oracle NetSuite come with built-in business intelligence (BI) tools, real-time dashboards, and automated reporting capabilities that are tailor-made for the food sector.

These tools allow manufacturers to quickly access critical data on production cycles, ingredient traceability, and compliance metrics, enabling them to make informed decisions on the fly. This real-time insight helps optimize production workflows, reduce waste, and ensure operations align with FDA, USDA, and other regulatory standards.

Ease of Maintenance & Continuous Improvements

Unlike smaller ERP vendors that may lack the resources to keep up with evolving industry needs, Microsoft and Oracle continuously invest in product development, security patches, and industry-specific enhancements. Food manufacturers benefit from regular updates that improve functionality, address regulatory changes, and optimize performance.

For instance, as food safety regulations evolve, these platforms can integrate new features that help manufacturers comply with the latest FDA, USDA, and international food safety standards. Their dedicated product teams and extensive partner ecosystems ensure that businesses receive ongoing support, making it easier to adapt to changes and minimize downtime.

A Future-Proof Investment

The risks associated with relying on smaller ERP vendors, such as the potential for discontinuation or lack of long-term support, are particularly concerning for food manufacturers who must adhere to strict regulations and maintain business continuity. Microsoft and Oracle, however, are market leaders with a proven track record of innovation in cloud-based ERP systems.

Their platforms evolve with emerging technologies like AI-powered automation, IoT-based traceability, and blockchain integration, which are increasingly adopted in the food industry. For example, blockchain can help improve food traceability from farm to table, ensuring complete visibility into the food supply chain. By investing in these future-proof solutions, food manufacturers can rest assured that their ERP system will continue to meet the demands of a rapidly changing regulatory and technological industry.

A Complete Solution for the Food & Beverage Industry

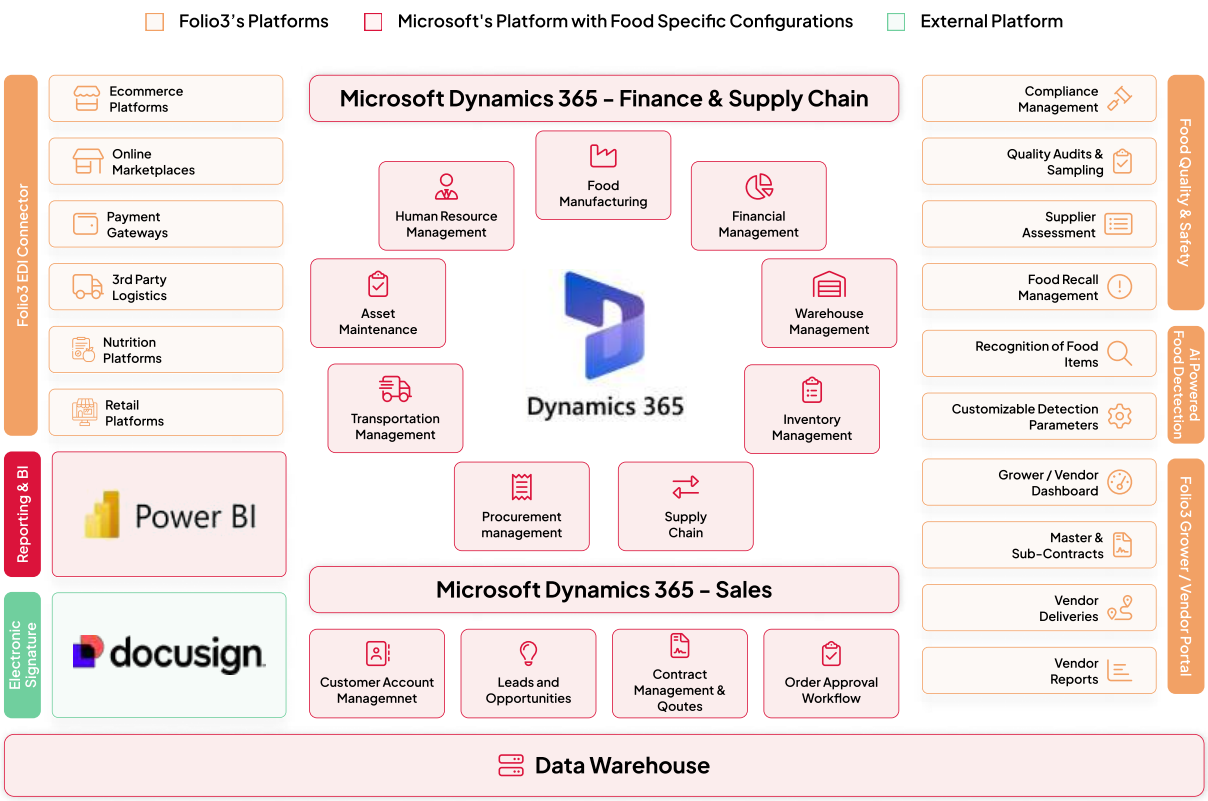
The food and beverage industry faces various challenges, including strict regulatory requirements, managing perishable inventory, and maintaining high operational efficiency. In this dynamic environment, an ERP system is not just a tool but the backbone of streamlined operations, enhanced food safety, and compliance with industry standards.

Folio3's Food ERP solution, built on the robust frameworks of Microsoft Dynamics 365 and NetSuite SuiteSuccess, delivers a scalable, integrated, and future-ready platform for food manufacturers, distributors, and retailers. Using the power of these leading ERP solutions ensures that your business operates efficiently and remains competitive in the fast-paced food and beverage market.

Microsoft Dynamics 365 – Perfect Integration for the Microsoft Ecosystem

Microsoft Dynamics 365 is the natural choice for companies already embedded in the Microsoft ecosystem. This cloud-based ERP system is designed to integrate with Microsoft 365, Power BI, Azure, and other Microsoft tools, creating a cohesive and efficient digital environment.

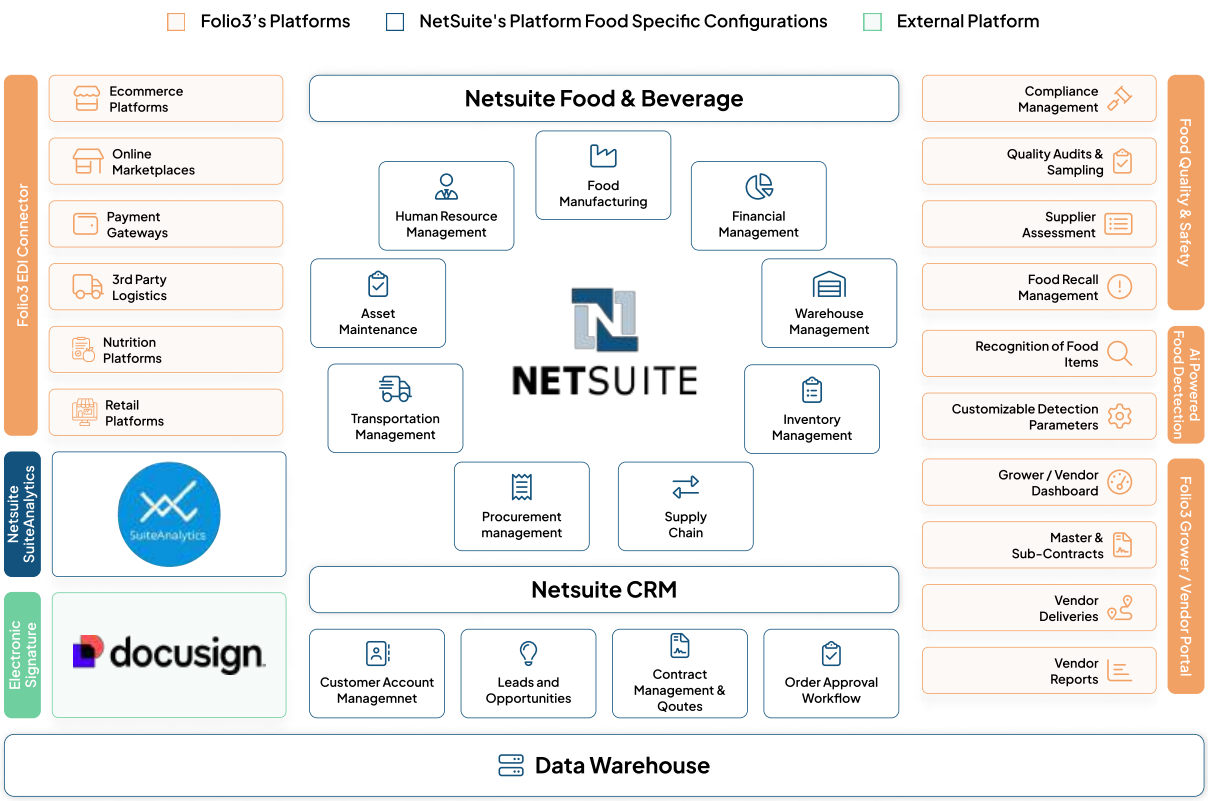
Dynamics 365 is favored by businesses operating within the Microsoft stack. It uses familiar interfaces and proven technologies that promote operational efficiency. For food manufacturers, it automates production planning, optimizes supply chain management, enhances product traceability, and ensures compliance with food safety regulations.



As a Microsoft Solution Partner, Folio3 specializes in customizing Microsoft Dynamics 365 to fit the unique needs of the food and beverage sector. Our Food ERP provides end-to-end efficiency, real-time analytics, and scalability, helping businesses improve productivity, meet compliance standards, and deliver exceptional products to market. Whether you're managing complex supply chains or forecasting demand, Dynamics 365 is an ideal solution for food businesses looking for a robust, future-proof ERP system.

NetSuite SuiteSuccess - Designed for Oracle-Backed Solutions

For food companies that prefer an Oracle-backed solution, NetSuite SuiteSuccess offers a robust cloud ERP tailored to the food and beverage industry. Built with industry-specific functionality, SuiteSuccess delivers a comprehensive suite of tools to optimize financial management, inventory control, demand planning, and supply chain coordination. With NetSuite, food businesses gain real-time visibility into their operations, improving order accuracy, inventory management, and the ability to respond quickly to market changes.



Larger organizations often favor Microsoft Dynamics 365 because it can handle complex financial structures, multi-entity operations, and advanced reporting needs. At the same time, mid-sized companies typically prefer Oracle NetSuite because of its scalability, cloud-native architecture, and cost-effectiveness. As a NetSuite Alliance Partner, Folio3 delivers tailored ERP solutions that leverage NetSuite's capabilities to enhance efficiency, traceability, and automation across the food and beverage value chain. Our industry-specific customizations help food businesses streamline operations, maintain compliance, and drive long-term growth with a flexible and scalable ERP system that adapts to evolving market demands.

Food ERP Solutions – Powered by Microsoft Dynamics 365 or NetSuite SuiteSuccess

Folio3's Food ERP solution combines the best of both worlds. It allows businesses to choose between Microsoft Dynamics 365 and NetSuite SuiteSuccess as their ERP backbone. By customizing either of these powerful platforms to the unique needs of the food and beverage industry, we enable companies to simplify operations, enhance visibility, improve compliance, and drive profitability.

Whether you choose Microsoft Dynamics 365 for its perfect integration with other Microsoft tools or NetSuite SuiteSuccess for its robust Oracle-backed functionality, Folio3 ensures that your business is equipped with a scalable, future-ready solution that supports both growth and regulatory compliance in the food industry.

Folio3's EDI Connectors – Perfect Integration for the Food Industry

Folio3's EDI connectors provide a plug-and-play solution for integrating essential third-party platforms with your food and beverage ERP system, whether you use Microsoft Dynamics 365 or Oracle NetSuite. Designed for the food industry, these connectors enable data exchange and automation across critical business functions, ensuring faster processing times, reduced errors, and enhanced operational efficiency.

With Folio3's EDI connectors, food businesses can fully automate and streamline their operations, from procurement and production to distribution and sales. They can also ensure compliance with industry standards and maintain high customer satisfaction.

Ecommerce and Online Marketplaces – Expanding Digital Channels

Folio3's EDI connectors integrate with leading eCommerce platforms like Shopify, Magento, and WooCommerce, enabling real-time order syncing, automated inventory updates, and streamlined fulfillment between ERP systems and online stores. This ensures accurate product availability, pricing consistency, and on-time deliveries for customers shopping online.

Additionally, through integration with Amazon, eBay, Walmart Marketplace, Instacart, and Thrive Market, food manufacturers can centralize order tracking, manage inventory across multiple marketplaces, and efficiently automate replenishment cycles, expanding into digital food and grocery platforms.

Payment Gateways – Automating Financial Transactions

Folio3's EDI connectors integrate with secure payment gateways like PayPal, Stripe, and Authorize.Net. They automate payment processing and reconciliation to eliminate manual effort, reduce errors, and accelerate financial transactions. This integration ensures secure and seamless financial operations across all touchpoints, whether processing eCommerce payments, third-party logistics (3PL) fees, or retail transactions.

Third-Party Logistics (3PL): Optimizing Shipment and Delivery

With integrations to FedEx, UPS, DHL, and ShipBob, Folio3's EDI connectors synchronize ERP systems with logistics providers, enabling real-time shipment tracking, automated freight cost calculation, and optimized delivery schedules, especially crucial for perishable food products that require timely transportation. This ensures that food shipments reach their destinations in peak condition, reducing inventory loss and maintaining product quality.

Nutrition and Compliance Platforms – Simplifying Labeling and Ingredient Tracking

Food manufacturers must comply with strict nutritional labeling regulations and track ingredients efficiently. Folio3's EDI connectors integrate with ESHA and Genesis R&D, automating nutrition labeling, ingredient tracking, and compliance verification. This eliminates manual data entry, ensures regulatory compliance, and simplifies food labeling processes, allowing businesses to maintain accurate and up-to-date nutritional data effortlessly.

Retail Integration – Synchronizing Supply Chain and Demand

Folio3's ERP integrations bridge the gap between food manufacturers and retail giants like Walmart, Kroger, and Whole Foods, enabling real-time demand forecasting, inventory synchronization, and automated order fulfillment. By aligning supply chain operations with retailer demands, businesses can maintain accurate stock levels, minimize disruptions, and optimize the flow of goods to ensure smooth and efficient retail distribution.

Folio3's Food Quality & Safety Platform – Ensuring Compliance and Excellence in Food & Beverage Manufacturing

Folio3's Food Quality & Safety Platform is designed to integrate with Microsoft Dynamics 365 and Oracle NetSuite. It offers a comprehensive solution for food businesses to ensure compliance with stringent industry regulations, manage food quality, conduct audits, and streamline supplier assessments. This platform provides food manufacturers the tools they need to maintain high standards of food safety, traceability, and quality control across every production stage, from raw material sourcing to finished products.

Compliance Management – Comprehensive Regulatory Adherence

Food safety regulations are intricate and diverse, making compliance management a critical challenge for manufacturers. Folio3's platform automates compliance tracking to ensure food businesses adhere to a wide range of regulatory frameworks, including FDA (Food and Drug Administration), USDA (United States Department of Agriculture), SQF (Safe Quality Food), FSMA (Food Safety Modernization Act), HACCP (Hazard Analysis and Critical Control Points), and other local and international standards.

Beyond simple reporting, the platform provides real-time audit trails, automated reporting, and alert mechanisms to ensure that every regulatory requirement is consistently met. The system allows manufacturers to track compliance status across key areas, such as labeling, sanitation, food handling procedures, and allergen management. By consolidating all these functions within the ERP system, food manufacturers can achieve 24/7 regulatory readiness, reducing manual effort and mitigating the risk of non-compliance penalties.

Furthermore, the system's HACCP and CCP (Critical Control Points) management features identify and monitor potential food safety risks throughout production. It generates automated warnings when critical limits are approached or exceeded, ensuring swift corrective actions before issues escalate.

Food Quality Audits & Sampling – Enhancing Traceability and Standardization

Digitizing food quality control processes is essential to maintaining consistent standards in food production. Folio3's Food Quality Audits & Sampling module streamlines the auditing process by deploying real-time monitoring tools to perform automated quality checks.

The system ensures standardized sampling procedures through automated schedules and data-driven quality benchmarks. This eliminates inconsistencies in the process and provides manufacturers with a clear, actionable overview of product quality, which can be used to drive continuous improvement. Additionally, it integrates with traceability systems to ensure that any product sampled or tested can be traced back to its source, production batch, and testing results, supporting transparency and accountability.

Supplier Assessment – Optimizing Raw Material Quality and Compliance

Folio3's platform also enables businesses to perform comprehensive supplier assessments directly within the ERP system, ensuring suppliers meet all necessary quality and compliance standards. This module monitors supplier performance by tracking quality consistency, delivery reliability, and compliance with contractual agreements. Food manufacturers can assess whether their suppliers adhere to industry standards regarding product specifications, food safety certifications, or HACCP guidelines.

The platform also supports automated supplier scorecards that aggregate key performance metrics over time. By centralizing supplier data, the platform enables food businesses to maintain consistent raw material quality, mitigate food fraud or contamination risks, and ensure product safety from the beginning of the supply chain.

Food Recall Management – Efficient Crisis Management

One of the most critical aspects of food safety is quickly and effectively managing food recalls. Folio3's platform automates traceability and recalls workflows, enabling food businesses to identify affected batches in real time, notify relevant stakeholders, and comply with regulatory mandates.

With end-to-end traceability capabilities, the system links every product to its raw materials, processing steps, and distribution channels. In the event of a contamination or safety issue, the platform quickly isolates the affected batches, identifies where the product has been distributed, and automates the recall process. Stakeholders, including regulatory bodies, customers, and suppliers, are instantly notified, ensuring that the recall is conducted swiftly and with minimal disruption.

Folio3's Vendor Portal

Folio3's Vendor Portal enhances transparency and efficiency in vendor management by providing a unified platform for real-time tracking, automated contract management, proof of delivery verification, and performance analytics. Streamlining procurement workflows and ensuring seamless communication helps food manufacturers maintain high-quality standards, optimize costs, and build long-term vendor relationships.

Dashboard

Vendors can access a centralized, real-time dashboard to track payments, shipments, quality reports, and purchase orders. This provides instant visibility into procurement operations, minimizing communication delays, reducing manual follow-ups, and enhancing decision-making.

Contract Management

Food manufacturers rely on structured contracts for raw material procurement, spanning single-year or multi-year agreements. The vendor portal facilitates the following:

Proof of Delivery (POD)

For high-value and perishable shipments, precise tracking is critical. The system enhances POD verification by:

Comprehensive Reporting

The portal generates various insightful reports that help businesses track and optimize vendor interactions:

Integration with DocuSign

The portal integrates with DocuSign for secure and automated contract execution. With electronic signature functionality, food manufacturers can:

- Ensure legally binding vendor agreements with regulatory compliance.
- Reduce paperwork inefficiencies and processing delays.
- Enable remote contract approvals, expediting procurement cycles.
- Maintain a digital audit trail for enhanced security and accountability.

Reports & Analytics

Folio3 empowers food businesses with data-driven decision-making by integrating robust reporting and analytics tools for Microsoft Dynamics 365 and Oracle NetSuite users. These platforms enable food manufacturers to track key performance indicators (KPIs), monitor compliance, forecast demand, and optimise supply chain operations with real-time insights.

Comprehensive Reporting for Food Businesses

Food manufacturers rely on detailed reports to maintain operational efficiency, regulatory compliance, and financial stability. With Power BI and SuiteAnalytics, businesses can generate:

Financial

- Trial Balance
- Financial Report
- Dimensions
- Customer Reconciliation
- Vendor Reconciliation

Lot Tracking

- Lot Summary
- Lot Profitability
- Lot Settlement
- Country of Origin
- Forward & Backward Lot Tracking

Account Receivable

- Aged Account Receivable
- Top Customers by Transaction
- Sales Statistics
- Customer Trial Balance
- Customer Order Summary
- Customer Order Detail
- Customer Item Sales
- Customer Balance-to-Date
- Customer Payment Receipt
- Customer Statement

Account Payable

- Aged Account Payable
- Top Vendor by Transaction
- Purchase Statistics
- Vendor Trial Balance
- Vendor Order Summary
- Vendor Order Detail
- Vendor Item Sales
- Vendor Balance-to-Date
- Vendor Payment Receipt
- Vendor Statement
- Payments on Hold

Inventory

- Inventory Transaction Details
- Inventory Status
- Inventory Availability Plan
- Inventory Order Details
- Inventory Customer Sales
- Inventory Vendor Purchases
- Inventory Cost & Price List
- Inventory Sales Back Orders
- Inventory Picking List
- Inventory Valuation
- Item Substitution
- Item Charges
- Item Age Composition Quantity
- Item Age Composition Value
- Item Expiration Quantity
- Item Dimension Detail

Food Safety

- Compliance Score
- Quality Performance
- Recall & Incident
- Supplier Performance
- Allergen Management
- Corrective Actions

Warehouse

- Warehouse Shipment Status
- Warehouse Bin List
- Warehouse Adjustment Bin
- Planning Availability
- Production Forecast

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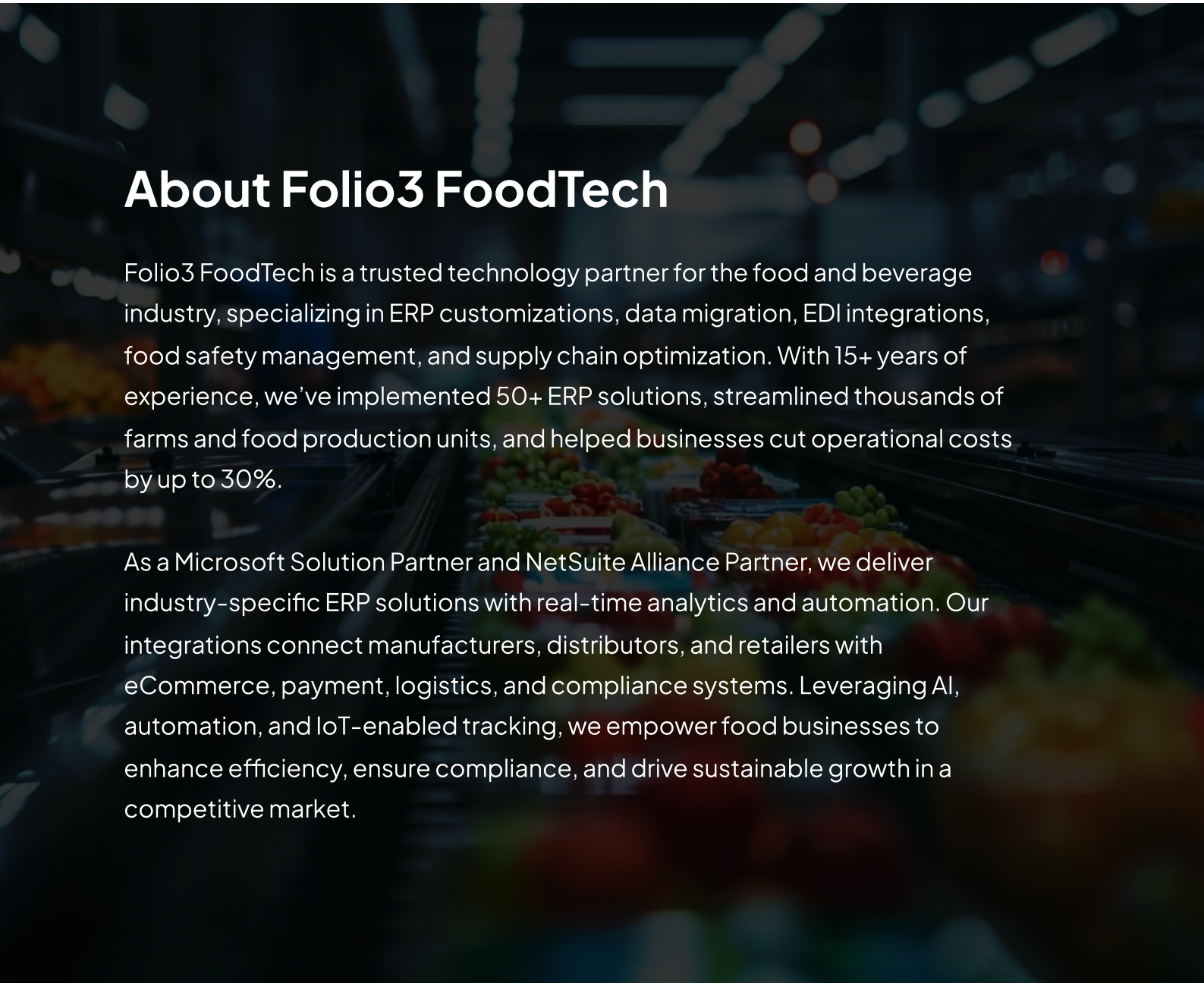

About Folio3 FoodTech

Folio3 FoodTech is a trusted technology partner for the food and beverage industry, specializing in ERP customizations, data migration, EDI integrations, food safety management, and supply chain optimization. With 15+ years of experience, we've implemented 50+ ERP solutions, streamlined thousands of farms and food production units, and helped businesses cut operational costs by up to 30%.

As a Microsoft Solution Partner and NetSuite Alliance Partner, we deliver industry-specific ERP solutions with real-time analytics and automation. Our integrations connect manufacturers, distributors, and retailers with eCommerce, payment, logistics, and compliance systems. Leveraging AI, automation, and IoT-enabled tracking, we empower food businesses to enhance efficiency, ensure compliance, and drive sustainable growth in a competitive market.

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