

# Morton Food Service | Powered by VAI



## The Company

When Morton Food Service was first established in 1919, it supplied tobacco and confections to convenience stores and gas stations. With the emergence of back-of-store kitchens and the preparation of food for patrons, Morton's gradually expanded into the food service industry, initially offering dry mixes, dry dressings, and other items. Today, the business serves over a thousand clients as a full-line food distribution service, carrying over 7,000 domestic and international products. These days, Morton supplies food and beverages to some of the best restaurants in Ontario. The company currently employs one district sales manager, three regional managers, and twenty-three field representatives.

### Industry

Wholesale Distribution, Food / Food Service

### Requirements

Food ERP, Mobile Order Entry and Proof-of-Delivery, Supply & Demand Planning, Analytics, Financial Management

## The Solution

When searching for a new ERP solution, Morton went through a pretty extensive discovery process, reviewing five different software solutions before selecting VAI's S2K ERP Food solution. "We had a good team with VAI for our implementation, said Patrick Lenover, Director of Project Management." Our Project manager and team worked with us to not only go over the standard features or what was available in VAI's ERP Food solution, but also helped us through a lot of customizations that we wanted to see specifically in our solution."

The VAI Mobile Order Entry screen, which has an order guide for its clients with past products they've ordered, is accessed by Morton representatives while they are in front of a customer. According to Robert Shepley, Sales/Regional Manager at Morton Food Service, Morton reps could not view the most recent margin, or any past purchases a client had made on that product using their previous system. "With VAI S2K, we can view history from the customer's first purchase—whether it was two months ago or four years ago—by clicking a button. We can track the price's beginning point, observe how it increased or decreased during the purchase process, and modify the margin."

Depending on where the margin is set, Morton representatives can see where their commission base is increasing or decreasing live on the screen. They can make the necessary adjustments based on the goals displayed on that one screen. Some of Morton's clients allow Morton to handle their inventory by creating their own orders. That's where the VAI mobile app really helps.

Employees at Morton can use a mobile device, such as a phone or tablet, to enter orders live while viewing the inventory, navigate about the restaurant, and access the freezer and cooler. Compared to manually writing on paper, it lowers the possibility of missing a certain item. The mobile Order Entry feature offered by VAI is extremely reliable in ensuring that orders are accurate.

Recently, Morton brought Omnitracs, also referred to as RoadNet, to integrate with VAI's S2K ERP. Morton exports orders to RoadNet as soon as they are received, and then they start optimizing their routes. Morton uses an FTP mechanism to send orders to Voxware whenever they're ready. Order assemblers are given assignments by Voxware after they receive the order. Morton can immediately submit an invoice after selecting all the needed products and sending a file back to VAI's S2K.

*The Solution continued:*

Morton began utilizing VAI's Mobile Proof-of-Delivery (POD) recently. Their drivers scan each piece of the truck when they visit a customer. VAI's POD can manually override non-scannable barcode products with a single button press. Additionally, Morton's drivers can short a product on VAI's POD app if it is returned the moment of delivery, for instance if it is delivered damaged, and the app will automatically produce a return authorization for prompt processing. By doing this, misunderstandings between Morton's drivers and the customer support representatives who would typically submit the return authorization are avoided. The procedure for returns is simplified.

For Morton, VAI's Suggested Purchasing application is a crucial ERP component. Sales were

tracked on one piece of paper and inventory on another in Morton's previous system, which was used by staff to complete purchases on paper. Every day, this was a taxing effort. "I love VAI's Suggested Purchasing tool because everything you need to make an informed decision is right there," Patrick Lenover said. "With a few clicks, you can get anything you want."

Morton is provided with recommendations via VAI's Suggested Purchasing tool. A single click on the analysis tab provides an insight into the calculation process. Continued Lenover, "We found it very useful with the usage adjustment screen to make those adjustments when you know that you have a one-time buy, a one-time purchase. You can change that and provide a remark so that going forward, everyone will understand why you made that decision. Then, with a single button click, it recalculates what your recommendation ought to be. We've been very happy with that."

"I work mostly on general ledger questions and occasionally review accounts that are received through VAI's S2K's accounts receivable module," said Michele Burza, Director of Finance and Operations. "My staff will handle the preparation of the financial statements. The reports I look at most often are cash flow, income statements, and financial statements." There are several functions for retrieving purchase orders and PO information, whether Michele is looking at buy orders or performing a vendor analysis. From there, he can extract a lot of reporting. Furthermore, a large portion of Michele's turnover and inventory reports originate from the analytics section.

Morton uses VAI Analytics for almost all their reporting. "I had no experience creating reports when we started this project," said Lenover. "I've created a third of the reports that are going out now. It's a very simple process, it's intuitive and there's a lot that you can do with the data."

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## The Result

Since Morton deployed VAI's ERP technology, dynamics have evolved. According to Joel Fillion, Distribution Center

Manager, Morton is now more efficient than it was before. "The biggest difference throughout the entire process is I have complete traceability of an item from the

time it hits the door until we actually sell it to the customer and up to and including when it's delivered to the customer."



*The Results continued:*

Since the launch, Morton has been using VAI's ERP software to achieve:

- Order accuracy
- Detailed view into customer order history
- Complete traceability

- Fast, easy, simplified returns
- Informed decision making
- Enhanced customer service

“Having access to the information allows me to make better decisions,” said Burza. “If I don't have information, it's relatively

easy to ask someone to generate a report for me with the actual specs that I'm looking for and the criteria, and I'm able to be better informed to manage my team or to manage this company.”

“This last year we've seen the most growth we've had in our company, ever. We're looking to continue to grow, and having a good solution like VAI and their S2K ERP platform on our side is really helping us, and our reps out there. Everything's working out.”

- Patrick Lenover, Director of Project Management, Morton Food Service