

Case Study: NetSuite Rescue Engagement Transformed into Ongoing Support



The Situation

PB2 Foods, Inc. (PB2), a manufacturer of powdered peanut butter and plant-based products, has been an audit* and tax client of Aprio since 2019. In efforts to streamline their financial reporting and inventory management, PB2 purchased NetSuite, a cloud-based accounting and enterprise resource planning (ERP) software. During a routine call with their Aprio Audit* and Tax Advisory team, PB2 shared how the company's recent growth and added complexities had created roadblocks in the support they needed to integrate NetSuite add-ons, including the Far App integration.

The Challenge

While PB2 had previously purchased a support package with NetSuite, they continued to experience issues with the Amazon integration connector and the Warehouse Management System (WMS) add-on module.

Amazon Integration Connector

In addition to having a large grocery store presence, PB2 also has a significant online presence. While utilizing NetSuite's Amazon integration connector, PB2 continually struggled with obtaining accurate sales and customer deductions reporting data.

Warehouse Management System

PB2 had purchased NetSuite's add-on WMS module along with all the hardware and scanners to monitor and track their inventory of raw materials and finished goods more efficiently, which were constantly moving back and forth between production and shipping. Unfortunately, NetSuite was unable to provide PB2 with implementation support for the WMS module.

The Solution

Aprio's Audit and Tax Advisory team introduced PB2 to our Business Applications team. After careful review of the challenges, Aprio signed PB2 up for a "Rescue Engagement" where our team would not only get the Amazon integration connector reconfigured but also implement the WMS module.

Aprio's solution provided clearer insight into raw materials and finished goods resulting in the second biggest sales month in PB2's history.

*Aprio assurance, attest, and audit services provided by Aprio, LLP.

The Outcome

What started out as a “Rescue Engagement” turned into a reoccurring support agreement with Aprio’s Business Applications team with access to a help desk where PB2 can call-in or open support tickets to get their questions answered and problems resolved.

Amazon Integra on Connector

Aprio’s Business Applications team were able to reconfigure the Amazon integration connection issue within 10 hours. PB2 can now collect and integrate their data from a sales and commissions perspective directly into NetSuite quicker and with more accuracy. Prior to Aprio’s assistance, they were entering this data in manually.

Warehouse Management System

The implementation of the WMS module was a complex undertaking and took months to complete. However, Aprio’s Business Applications team, along with leveraging our Philippines office, were able to re-engineer the WMS module within NetSuite and rebuilt the system so it matched the physical components of PB2’s warehouse. This engagement began in January 2023 and went live on August 1. Since the launch of their WMS module, PB2 had their second biggest month in the company’s history working on their brand-new warehouse system. The real win for PB2 was seamlessly moving record inventory since they now had clearer insight into their raw materials and finished goods.

Contact us to learn how Aprio’s Business Applications Services can help you optimize your business technology to achieve your goals.



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