SALESPAD BY CAVALLO | HP HAUSER PACKAGING

CASE STUDY

HAUSER PACKAGING

PORTLAND, MAINE | HAUSERPACK.COM

Achieved 100% order visibility across all queues

The Company

Based in Portland, Maine, Hauser Packaging is a specialized distributor of high-quality glass, corks, closures, and custom packaging solutions for the wine and beverage industry. Serving craft beverage producers across the country, Hauser Packaging manages a complex supply chain that includes custom packaging, 3PL warehouse operations, and light assembly prep.

The Challenge

When Hauser Packaging migrated from QuickBooks to Microsoft Dynamics 365 Business Central in January 2026, they quickly uncovered a common challenge for growing distributors. While standard Business Central managed core financial transactions smoothly, it offered limited control and visibility over the operational steps spanning the entire quote-to-cash process.

Standard Business Central relies on approval-based rules rather than step-by-step process controls, creating an operational blind spot around where an order actually stands in the sales cycle. Customer service staff were forced to rely on filtered lists and memory while order details remained scattered across spreadsheets and email threads. This left the team unable to differentiate between an order waiting on a vendor purchase order, one requiring assembly prep, or one ready to book freight.



Without step-by-step stage tracking, crucial handoffs occurred informally across email and Microsoft Teams, leaving ownership unclear and tasks prone to slipping through the cracks. Critical requirements, such as orders needing vendor purchase orders or light assembly prep,

> "Native Business Central handles transactions well, but it doesn't handle the process around the transaction. Mission Control™ gives our team a single answer to the only question that matters on any order: what happens next, and who owns it."
>
> **Papillon Erreca, General Manager, Hauser Packaging**

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frequently surfaced late in the cycle, often when target ship dates were already at risk. Furthermore, because inventory couldn't be reserved at specific stages, components allocated for custom assembly showed up in available stock balances instead of being locked to their respective orders.

> "Because queue placement clearly defines task ownership, we eliminated ambiguous states where team members might assume another department owned the task."
>
> **Papillon Erreca, General Manager, Hauser Packaging**

The Solution

To bridge the gap between accounting and day-to-day order execution, Hauser Packaging implemented Mission Control™, the cornerstone of SalesPad for BC by Cavallo® that provides no-code workflows, process automation, and real-time order visibility. Mission Control presents the order pipeline as a list of queues inside Business Central, grouped by document type. Hauser orders enter the first queue and work their way down through each stage to shipped, so anyone can see at a glance where an order sits and whether it needs attention. Rather than jumping directly into complex automated rules, Hauser focused first on establishing a clean, human-driven workflow anchored by a strict design principle: "One queue, one action." Under this rule, whenever an order enters a specific queue (or process stage), the assigned team member knows the exact next step to move the order forward.

Hauser established a defined queue sequence, advancing orders from initial approval through pick prep, freight booking, bill of lading issuance, and final fulfillment. The architecture easily handles Hauser's dual order pathways. Standard palletized glass orders with no custom rework skip warehouse prep and move directly to freight booking. Orders requiring assembly prep move through pick-in-progress first, allowing both order streams to converge seamlessly at the freight booking stage.



Because Hauser ships through third-party logistics partners rather than an owned warehouse, moving an order to the warehouse release queue serves as the official signal to 3PL staff. Once an order is ready, customer service moves it into the release queue, often several days ahead of the ship date, which gives the warehouse time to plan the work instead of handling a last-minute shipment. Additionally, inventory reservations now trigger automatically upon entry into specific queues, primarily at warehouse release and against assembly orders, locking down consumed components and ensuring sellable stock balances remain accurate.

> "By reserving inventory upon entry into specific queues, we sharply reduced overselling and gained real control over our assembly prep. We know the moment stock is committed to a 3PL or an assembly order, it is truly locked."
>
> **Papillon Erreca, General Manager, Hauser Packaging**



The Results

By establishing a stage-based order workflow, Hauser Packaging eliminated operational friction and built a business foundation ready for long-term scalability.

Defined queue stages have completely replaced routine email and Teams conversations—reserving chat messaging strictly for urgent exceptions and same-day shipments. Because the release point became a system queue rather than an individual, Hauser pulled freight coordination out of the customer service reps' daily work. Reps now concentrate on proactive sales support: conducting outbound calls on open quotes, tracking quotes near expiration, confirming ship dates, and driving orders with Mission Control.

Most importantly, orders no longer sit in ambiguous states, because every queue has an owner and a defined next step. Team members can see at a glance what to work on next. Hauser Packaging now has the structured framework in place required to roll out automated rules and triggers in the coming year, such as auto-advancing orders upon purchase order receipt and enforcing required fields before an order leaves a queue.

> "Mission Control™ allowed us to replace the conversation with the workflow. A handoff used to be an email or a Teams message where ownership was easy to drop. Now, an order's position in the queue is the handoff, and messaging is reserved strictly for exceptions."
>
> **Papillon Erreca, General Manager, Hauser Packaging**

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