



Company name

Foley Family Wines

Location

Sonoma, California, USA

Industry

Wine & Spirits

Solution

Accounts receivable



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Joyce Gromada

Sales Administration
Manager

CASE STUDY

Company profile

Foley Family Wines & Spirits (FFWS) is a portfolio of highly acclaimed wines and spirits from some of the world's greatest estates. The company owns more than 25 wineries and distilleries, each with its distinct style, legacy, and approach to hospitality.

With a strong presence in wine country and a sales distribution model that includes more than 200 distributors, FFW's success is rooted in its ability to integrate acquisitions and streamline operations to support consistent growth.

Before Fraxion

Prior to implementing Fraxion, Foley Family Wines faced significant operational challenges due to an influx of acquisitions that exposed inefficiencies in its accounting processes.

Manual workflows, particularly in cash applications and credit memo processing, were overloading the remote sales and customer service teams, resulting in time-consuming and error-prone work. Payments from distributors frequently arrived before credit memos had been processed, creating mismatches that made cash reconciliation difficult.

Distributors submitted deduction requests to the remote sales team, who then marked up the forms manually and submitted them to customer service. This labor-intensive and decentralized method relied on spreadsheets and manual data entry into the accounting system, leading to inefficiencies, delayed processes, and inconsistent results across new acquisitions.

The growing volume of transactions further amplified these challenges, making automation not just beneficial but essential.



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The solution

Fraxion implementation

Foley Family Wines turned to Fraxion to automate and streamline its back-office processes, starting with the credit and deduction request workflow. Joyce Gromada, Director of Sales Administration, collaborated with the Fraxion team to design a phased rollout that aligned with FFW's payment cycles. Instead of overwhelming the entire organization with immediate change, FFW piloted the new process with a single salesperson. This pilot approach allowed the team to refine workflows and gain internal buy-in before expanding adoption. As the implementation scaled, the burden of manually entering deduction data was lifted from the sales team. The credit/deduction requests were now routed directly into the Fraxion receivables solution.

Fraxion enabled digital routing of credit requests for coding and approval. Sales team members assigned deduction codes within the system, and approvals were automated via Fraxion's workflow engine. Approved memos were then uploaded via file exchange into FFW's Warehouse Information Management System (WIMS), streamlining the end-to-end process. With this automation in place, credit memos could be posted before payments arrived, effectively resolving the payment-to-invoice mismatches that had previously hindered the cash application process. Not only did this improve distributor relationships through more timely and accurate transactions, but it also enhanced internal efficiency, allowing the sales and admin teams to focus on strategic growth initiatives.

Automated credit and deduction routing

By digitizing and automating the credit memo approval process, Fraxion eliminated manual handoffs, reduced errors, and ensured timelier processing.

Requests are routed to the appropriate sales staff for code assignment and automatically escalated to managers for approval—saving time and improving control.

File exchange integration with WIMS

Once approved, credit memos are uploaded directly into FFW's core accounting system. This seamless integration ensures real-time posting and eliminates delays between approval and system updates.



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Improved cash application

The ability to post credit memos before receiving payments eliminated the common issue of mismatched payments. This not only improved internal reconciliation but also strengthened distributor relationships.

Scalability for acquisitions

The standardized, automated process provides a repeatable model that FFW can apply as it continues to acquire new wineries. This consistency supports smoother onboarding and integration across business units.

Employee empowerment and productivity

With manual tasks reduced, both the remote sales team and administrative staff can now redirect their efforts toward strategic initiatives. As Joyce noted, "The system is giving the team more control and they have access to more data."

RESULTS

Foley Family Wines now operates with a streamlined, automated receivables process that supports its rapid growth and acquisition strategy. The successful deployment of Fraxion's AI-driven receivables solution has improved employee productivity, reduced payment reconciliation issues, and provided a standardized accounting framework for future expansions.

Next on the roadmap is the automation of deduction code entry to further reduce touchpoints for the sales team and allow them to focus more fully on sales activities. With automation now embedded into the day-to-day operations, FFW is exploring how additional Fraxion AI agents can be deployed across other administrative areas to tackle some of the most complex challenges facing wine businesses.

By turning manual processes into automated workflows, Foley Family Wines has embraced a future-focused approach—one that prioritizes efficiency, data access, and scalable growth.

BENEFITS

- **Time savings:** By eliminating manual entry and automating approvals, FFW significantly reduced the time spent on processing deduction and credit requests.
- **Cash flow improvements:** The ability to post credit memos before payments arrive has resolved mismatches and accelerated cash application, improving overall cash flow.



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- Improved employee productivity: With tedious administrative tasks offloaded to AI agents, the sales and admin teams can focus on higher-value activities that drive growth.
- Stronger distributor relationships: More timely and accurate transactions have improved communication and collaboration with FFW's network of over 200 distributors.
- Scalability and consistency: A standardized, automated process enables efficient onboarding of newly acquired wineries and ensures consistent practices across the organization.

WORKING WITH FRAXION

Exceptional support and a strong partnership

Foley Family Wines' collaboration with the Fraxion team was instrumental in the successful rollout and adoption of the AI agent solution. The partnership began with a deep understanding of FFW's existing workflows, challenges, and business goals. Mary from Fraxion worked closely with Joyce Gromada to design a tailored implementation plan that aligned with the company's invoicing cycles and change management needs.

The decision to start with a pilot user helped gain internal trust and iron out process improvements before rolling the system out company-wide. This measured, collaborative approach ensured a smoother transition from manual to automated processes.

Throughout the engagement, Fraxion provided ongoing support, system optimization, and strategic insights—allowing FFW to not only solve immediate problems but also plan for continued automation and efficiency.

The result is a long-term partnership built on trust, shared goals, and a mutual commitment to innovation and operational excellence.

CONCLUSION

By embracing Fraxion's AI-driven automation, Foley Family Wines transformed its receivables process, improved operational efficiency, and laid a strong foundation for scalable growth. The successful partnership with Fraxion continues to support FFW's expansion and drive innovation across its accounting operations.