



## Microsoft Business Solutions Retail Management System Customer Solution Case Study



### Overview

**Country or Region:** United States

**Industry:** Retail

### Customer Profile

Morning Star Books & Gifts in Lombard, Illinois, has served the surrounding area's large Catholic community since April 2000.

### Business Situation

QuickSell 2000, the initial retail system, had always kept inventory and customer lists organized. When Microsoft acquired the product, the opportunity arose to secure ongoing technical improvements.

### Solution

Morning Star acquired QuickSell 2000, then upgraded to Microsoft® Business Solutions Retail Management System, lighting the way to easy expansion and time to concentrate on customers.

### Benefits

- Staff easily adapt to more robust system
- More powerful reporting
- Faster credit transactions with fewer steps at day's end
- Gift cards, and imminent Web integration, raise sales
- Retained a proven IT provider

## Religious Book and Gift Store Gains Material Benefits by Converting from QuickSell 2000

*“We knew Microsoft Retail Management System would give us upgrades—both in its business capabilities and in the new technologies that are always coming out.”*

*Christine Regan, Owner, Morning Star Books & Gifts*

As a religious book and gift store grew to 7,600 inventory items, its customer base, services, and chores also expanded. Staff's highly personal touch, straightforward marketing, continuous advertising, and sales outreach into the community continually raised revenues.

From the store's inception, QuickSell 2000 had served it well as a retail management solution. Stock was ordered on time, and customer records were available to counsel with new purchases and to estimate inventory needs. When Microsoft acquired the QuickSell product line, Morning Star owner Christine Regan wanted to ensure she had ongoing technical support and upgrades. She acquired Microsoft® Business Solutions Retail Management System as the smoothest possible transition to an expanded system.

Today, a smooth learning gradient, faster credit card handling, and more dynamic reporting testify to the wisdom of that upgrade.



“We’ll get ongoing benefits but need no retraining. The new program just adds knowledge to what your staff already knows, and it shortens their tasks.”

Christine Regan, Owner, Morning Star Books & Gifts

## Situation

Opened in 2000, Morning Star Books and Gifts sells more than 7,600 items of Roman Catholic literature for all ages and religious events, plus a comprehensive selection of religious articles, gifts, and memorabilia. In addition to the Bibles, rosaries, medallions, and crucifixes displayed, Morning Star offers holy water fonts, a large selection of religious art, and outdoor statuary, and it drop ships some large items. Stock currently approaches 33,000 pieces.

Morning Star also has a unique section of “rescued” religious articles found at garage sales, flea markets, and old churches. “Everybody likes knowing these items get the use they were intended for,” says owner Christine Regan.

But when the store opened, says Regan, “We were first-time storekeepers with no retail experience at all.” Even so, Morning Star has expanded revenue and merchandise every year. Regan sees her efforts as part commercial, part mission, so she and a staff of eight cater to customer needs with gift-buying advice, gift wrapping, shipping, special orders, and a homey coffee bar.

Marketing efforts include a growing Web site that attracts customers into the store, as do the First Communion catalogs that Morning Star gives to many local Catholic churches. Joint marketing efforts include allowing churches to take inventory off-site, sell it at book sales, and share a portion of the profits. “We also do a lot of advertising in local newspapers, the Catholic newspaper, and sponsorship ads on the local Catholic radio station.”

The store’s original retail management solution, QuickSell 2000, was helping the business grow smoothly, track inventory, speed purchasing, and utilize its ever-

expanding database of customer buying histories.

“But we saw that to maintain growth and keep inventory and purchasing orderly, we would be very smart to upgrade from QuickSell to Microsoft® Business Solutions Retail Management System,” says Regan. “That gave us ongoing tech support when we ran into something unexpected and when we wanted to implement new features. We knew Microsoft Retail Management System would give us upgrades—both in its business capabilities and in the new technologies that are always coming out. But we didn’t foresee a lot of the other benefits that would come from this choice.”

## Solution

Morning Star licensed Microsoft Business Solutions Retail Management System soon after Microsoft acquired the product line.

“We had used QuickSell from the beginning,” says Regan. “It helped us newcomers learn retail and we had used it for four years, so there were no huge situations that needed resolving. It was a wonderful program, which is probably why Microsoft selected it. We got in touch with Merchants Solutions and put in Microsoft Retail Management System.”

Merchants Solutions is a Microsoft Certified Partner in Hillside, Illinois, specializing in retail solutions that adapt Microsoft Retail Management System to individual retailers’ needs.

The system was installed in May 2004. “It went in very smoothly,” says Regan. “Even the learning curve for our staff was smooth. It uses very much the same screens, the same processes, but offers you many more features, ways to do things, and better tools for growth than we would have got staying with QuickSell.

## “Today, we don’t have those day-end steps of balancing credit card batches and running reconciliation jobs through QuickSell Authorizer.”

Christine Regan, Owner, Morning Star Books & Gifts

“My management screens look similar, but looking around in Active Reports, for instance, shows me more ways to get a report doing exactly what I want it to.

“And I now have two levels of support. Merchants Solutions has always been excellent about getting me right answers and providing me good advice on things I didn’t even ask about. Now I know they can turn to Microsoft support if we ask them to do something really exotic.”

“Frankly,” says Regan, “this is an ideal conversion plan. We’ll get ongoing benefits but need no retraining. The new program just adds knowledge to what your staff already knows, and it shortens their tasks. So we got very quick buy-in from staff and no resistance.”

### Benefits

The prime benefits of converting from QuickSell to Microsoft Retail Management System for a busy store with a large inventory from a large number of vendors lay in three areas: increased reporting adaptability and power; faster credit card integration; and the security of continued support.

#### A Reporting Renaissance

“We can now make our reports show us exactly what we need,” says Regan. “I also know that, while making reports, if I see an error in the database, I can go right in there and correct it from the report screen, then continue creating my custom report.”

For last year’s physical inventory, Regan hired a professional stock-taking company to count pieces and verify stock levels. “QuickSell would not have been able to do the intricate reports in the ways that they wanted them. We got excellent help from Merchants Solutions in formatting those initial reports to the inventory company’s specs, then again in re-inputting their results back into our new

system. As retailers share data with external business partners, tools need to be sharper to conform everyone’s data. We had our technical backup, and Microsoft software did the job.”

Every day, Regan runs a daily sales report to monitor income and check which items are selling best. She says, “We also generate monthly sales reports and have found that we can create a report for just about any business data we need. We have customized reports that guide our purchasing, and we use the purchase order capabilities to shorten ordering time. The transfer in/transfer out continually helps us, and we use the wizards nearly every day. The ‘inactive’ feature helped us trim unmoving inventory items.”

#### Faster, Smoother Credit Card Handling

The integrated Citibank Merchant Services credit card processing available with Microsoft Retail Management System speeds tasks, ensures accuracy, and has eliminated counter clutter at Regan’s two registers. The magnetic stripe reader resides in the keyboard, and processing is “step-free.”

“Instead of waiting sometimes a minute for credit authorizations, we get an okay about the time the card goes back in a wallet,” says Regan. “It’s essentially unnoticeable during the transaction.”

“At day’s end, QuickSell used to make us go into its Authorizer program to do daily credit card reconciliations and to fully integrate all charges into the Microsoft Access database. Today, we don’t have those day-end steps of balancing credit card batches and running reconciliation jobs through QuickSell Authorizer. This was like cash balancing, but if there was even a tiny discrepancy, we had to go looking through journals and signature slips to find it. Now it’s a straight shot from the credit card transaction to authorization,

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Christine Regan, Owner, Morning Star Books & Gifts

to integration into the Microsoft SQL Server™ database. That’s always one less step. Sometimes, it’s many fewer steps.”

“We have also added a gift card program that shows lots of potential,” Regan says. “Robert Buffo of Merchants Solutions introduced this idea and helped Morning Star get the card designed, printed, and integrated. Microsoft Retail Management System also rings up coffee shop items, gift wrapping, shipping charges, and churches’ off-site book sales.”

#### **Learning New System Features**

Staff and Regan explore new features, or call Merchants Solutions for suggestions, as needed, knowing their knowledge base will continue to be useful as the product evolves.

“It’s faster to enter new merchandise,” says Regan, “and track special orders. Sales reps that come in are impressed at our record keeping and how organized our reordering is. We just started using the time clock feature. Our employees now punch in and punch out at the register, making our payroll much more accurate.”

For its book inventory, Morning Star uses the Alias feature extensively. “We sub in the barcode for the stock-keeping unit number to avoid putting messy labels on nice books,” Regan says. “This preserves nice book covers and saves the expense and labor of pasting on barcode labels.”

#### **Plans and Recommendations**

Regan says, “I would highly recommend Microsoft Retail Management System, and I also highly recommend Merchants Solutions. This program has been very beneficial to our store.”

Regan has asked Merchants Solutions to explore how to directly download transaction, customer, tender, and stock data from Web-based sales into Microsoft Retail

Management System. “Robert Buffo and Jeff Faul of Merchants Solutions have been incredibly helpful to us with any questions or problems that arise.

“Every retailer needs to look at the store as a business, not a pastime,” says Regan. Even in specialty stores like ours, customers have options elsewhere. We need to do everything possible to bring retail operations to a professional level, both in their appearance to the customer, and in their behind-the-scenes efficiency. It is imperative to utilize the most current programs available to keep up with your inventory, financial reports, customer histories, and competition. I’m confident Microsoft will always be on the leading edge of introducing and supporting proven new retail tools.”

## For More Information

For more information about Microsoft products and services, call the Microsoft Sales Information Center at (800) 426-9400. In Canada, call the Microsoft Canada Information Centre at (877) 568-2495. Customers who are deaf or hard-of-hearing can reach Microsoft text telephone (TTY/TDD) services at (800) 892-5234 in the United States or (905) 568-9641 in Canada. Outside the 50 United States and Canada, please contact your local Microsoft subsidiary. To access information using the World Wide Web, go to: [www.microsoft.com](http://www.microsoft.com)

For more information about Merchants Solutions products and services, call (800) 486-3214 or visit the Web site at: [www.merchants-solutions.com/retail.asp](http://www.merchants-solutions.com/retail.asp)

For more information about Morning Star Books & Gifts products and services, call (630) 629-1720 or visit the Web site at: [www.mrngstr.com](http://www.mrngstr.com)

## Microsoft Business Solutions Retail Management System

Microsoft Business Solutions Retail Management System offers a complete store automation solution for small and medium-sized retailers, streamlining point-of-sale (POS), customer service, and store inventory management, and providing real-time access to key business metrics. Microsoft Retail Management System is a comprehensive solution for single-store and multi-store retailers that empowers independent proprietors, store managers, and cashiers through affordable and easy-to-use automation. Microsoft Retail Management System has the flexibility and scalability to grow with a retailer's business. It works with the Microsoft Office System, Microsoft Windows® Small Business Server, and leading financial applications to provide end-to-end support from the cash register to the back office.

For more information about Microsoft Retail Management System, go to: [www.microsoft.com/pos](http://www.microsoft.com/pos)

### Software and Services

- Microsoft Business Solutions
  - Microsoft Business Solutions Retail Management System
- Microsoft Office System
  - Microsoft Office Professional Edition 2003
- Microsoft Windows XP Professional

### Third-Party Software

- Intuit QuickBooks Professional 2003

### Hardware

- Three Dell Dimension 8400 desktop PCs
- Two generic mid-sized PCs
- Cognitive Blaster Advantage label printer
- Epson TM-T88 II receipt printer
- PSC barcode scanners
- MMF cash drawer
- MagTek magnetic stripe readers
- 15-inch CRT monitors

### Partners

- Merchants Solutions

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