



Microsoft Business Solutions Retail Management System Customer Solution Case Study



Custom Jeweler's New Retail System Helps Store Run Like Clockwork

Overview

Country or Region: United States

Industry: Retail

Customer Profile

In business for 30 years, Swissa Jewelers has been making and selling a large inventory of custom-designed jewelry, while stocking and selling high-end wristwatches from its Seattle, Washington, store.

Business Situation

An old and unreliable UNIX-based information system crashed frequently, so co-owners Moti and Maryann Swissa embarked on a five-year search for a retail system that matched their needs.

Solution

Microsoft® Business Solutions Retail Management System shines with instant and accurate reports, high software compatibility, prompt and effective support, and rapid point-of-sale (POS) operation.

Benefits

- Simple, easy-to-learn POS
- Instantly generates sales and inventory reports
- Vastly shortened backup time
- Timely and reliable technical support

“We never expected a retail system to make us money. We just wanted help running our business with less effort and frustration. This system and Microsoft have gone far beyond the call. What a find!”

Moti Swissa, Co-owner, Swissa Jewelers

After tolerating a moody and archaic UNIX-based retail system for years, Moti and Maryann Swissa of Swissa Jewelers decided enough was enough. “It was costing us so much unnecessary time and money,” says Maryann. “Something had to change.”

“We bought and installed three other retail solutions, one after the other,” says Moti, “but most were useless. Finally, we found Microsoft® Business Solutions Retail Management System. Earlier experiences had made us sceptical, but this system is great!”

Since installation in May 2004, information availability at the store has dramatically increased. “Not just with a fast point of sale [POS], either,” says Moti. “Inventory, customer tracking, sales reporting, e-mailing—this Microsoft program has all the facets.”



“I wish we had discovered Microsoft Retail Management [System] three systems earlier. We wasted so much money on other solutions.”

Moti Swissa, Co-owner, Swissa Jewelers

Situation

For 30 years, Moti and Maryann Swissa have been selling a large inventory of custom jewelry, loose diamonds, and watches. Items may range up to U.S.\$250,000. The couple designs and makes an extensive number of custom pieces, at prices firmly agreed upon in advance regardless of redesigns.

Moti Swissa's entry into the jewelry business 30 years ago was making gold and silver ingots for corporate promotions, incentives, and business gifts. More recently, his UNIX-based retail management system faltered in its information duties and crashed unpredictably.

Problems Creating Problems

“Our previous system was a nightmare of glitches,” says Moti. “On busy days, it would go down and we'd have to handwrite every order—which can put off customers. Then, when we finally got the system back up, we'd have to manually reenter every sale after closing.”

On top of the technical difficulties, he says, “When the system locked up, we had no one to call who knew the system or our business. Because we were using a system heavily tailored as a jewelry-store solution, it wasn't used widely enough to even have experts! We'd always get a new person on the help desk who didn't have the answers.”

Slow Operation

When the system worked, performance was far from ideal. “It was slow to process customer transactions, particularly credit card authorizations,” Moti says. “It was incompatible with our accounting procedures. We ended up reentering everything in the back office just to stay on top of inventory and financials.”

Beyond daily struggles with the system, the Swissas found limitations in the size of the

item file and the amount of customer data that they could store, which constricted plans for growth. Finally, the liabilities outweighed the benefits of the old system and they realized they had to start over.

Solution

“Since we had been running Microsoft® Office products for years, we really wanted a point-of-sale [POS] system compatible with them,” says Moti. “We went through extensive studies and tests. We tried out custom systems for jewelry stores, but it seemed nothing available had all the POS features, the business control, and the ease of operation. Every one fell short.”

In prospecting for a fully satisfactory retail solution, the Swissas purchased and installed three other systems, found limitations with each, and kept looking.

Finally their hunt ended. “We were eventually introduced to Microsoft Business Solutions Retail Management System,” he says. “It fit our checklist. We couldn't really believe it at first.”

Smooth Installation

Microsoft Certified Partner New West Technologies made installation a breeze. “It went very smoothly,” Moti says. “Microsoft and New West were anxious for us to have a system that worked not just well enough, but extraordinarily. They wanted us to see the difference when a system is complete, smooth, and reliable. And has rapid backup and reliable reports.”

As they began to run their business through their new system, instead of around one, the Swissas began replacing manual processes with automation. “Our core business procedures have always been well run,” says Moti, “even when the other computer systems couldn't keep up. Now everything is on the same page.”

“We have such easy access to customer information that we now use it for gift registries....Then it’s all right there for the buyer: gold or silver, chain length, ring and bracelet sizes—everything.”

Maryann Swissa, Co-owner, Swissa Jewelers

Instant Results

One area that showed immediate improvement was the customer tracking. “We have such easy access to customer information that we now use it for gift registries,” says Maryann. “One party comes in and picks out what they like for their wish list. Then it’s all right there for the buyer: gold or silver, chain length, ring and bracelet sizes—everything.”

With so much useful information available, the owners have begun rolling out promotions that weren’t feasible before. “We’ll be doing mailings to our customers, timed just before birthdays and anniversaries, to remind them we are here to help them with memorable purchases,” she says. “We even track baby’s names and birthdays!”

Improvement in All Areas

“Tracking our inventory is now a breeze, even with all the custom products we design ourselves,” says Maryann. “In jewelry, you dare not misplace even one inventory item. We enter new items in the system and have begun including photographs of our designs in the database. It’s an impressive touch for selling, and can help customers in the event of a loss.”

“When we custom-craft pieces, we use Microsoft Retail Management System to automatically e-mail customers when it’s complete,” says Moti.

Benefits

With the company running smoothly, Moti is full of praise for his new retail solution. “We never expected a retail system to make us money,” he says. “We just wanted help running our business with less effort and frustration. This system and Microsoft have gone far beyond the call. What a find!” Their entire operation is now essentially paperless. “For me it’s a mental thing,” says Moti. “It’s very freeing. My mind is so much

less cluttered. I can put my attention on customers, designs, marketing—things I like, things that make us money!”

Quick, Reliable Reports

Both owners make good use of the solution’s ability to generate accurate, precisely customized reports instantly. “Finally, reporting is simple,” he says. “We get our monthly sales breakdowns with just a few clicks. We even have reports that automatically handle sales tax submissions to the city of Seattle, the state, and all the paperwork our bank wants for our inventory credit line.”

Operations at POS have stabilized. “Our registers give us access to descriptions and prices of all merchandise,” Maryann says. “We configured security levels so our staff can get information they need, but don’t see anything they shouldn’t.”

Given system stability and eliminating handwritten tickets, POS is more customer friendly. “Making jewelry sales can have many steps,” says Maryann. “Looking up items, entering customer information, pulling up work orders and layaways, getting credit approvals...it’s all much faster than before. And when we swipe the card, it’s processed instantly.”

Back Office Made Easier

Routine system maintenance is shorter. “In our previous systems, making nightly backups took 15 minutes,” Maryann says. “Now, it’s two minutes and we’re out the door.”

Accounting tasks are simpler and faster. “Microsoft Retail Management [System] has built-in support for export to QuickBooks,” Moti adds. “I just update my journal once daily, click a button, and everything is automatically transferred to accounts payable, accounts receivable, and all the way

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

For more information about New West Technologies products and services, call (503) 235-4656 or visit the Web site at: www.newestech.com

For more information about Swissa Jewelers products and services, call (206) 625-9202 or visit the Web site at: www.swissa.com

through to the general ledger. Ask any retailer how much time they spend on that type of task. It's a daily drain."

Expanding

The Swissas expect the system to grow with them as they expand their online presence in the coming years. "We will soon set up our Microsoft system to handle e-commerce transactions on the Web site," Moti says.

After so many years spent coping with inadequate systems, Moti says, "I wish we had discovered Microsoft Retail Management [System] three systems earlier. We wasted so much money on other solutions. But this does everything we need—quickly, easily, and very, very dependably. This is a gem!"

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

Software and Services

- Products
 - Microsoft Windows XP Professional
- Solutions
 - Microsoft Business Solutions Retail Management System
 - Microsoft Office 2000 Professional

Third Party Software

- Intuit QuickBooks Pro

Hardware

- Dell OptiPlex PC
- New West Technologies PCs

© 2004 Microsoft Corporation. All rights reserved.

This case study is for informational purposes only. MICROSOFT MAKES NO WARRANTIES, EXPRESS OR IMPLIED, IN THIS SUMMARY.

Microsoft and Windows are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries. The names of actual companies and products mentioned herein may be the trademarks of their respective owners.

Document published December 2004

Microsoft[®]