



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

**SIGNATURE WINERIES**  
NAPA VALLEY, CALIFORNIA

### Overview

**Country or Region:** United States

**Industry:** Retail

### Customer Profile

Cosentino Winery, located in Yountville, California, produces a line of over 40 award-winning ultra-premium Napa Valley wines. It features a tasting room, gift shop and a large wine club.

### Business Situation

An old and inflexible retail management system forced Cosentino Winery managers to spend valuable time on billing, inventory, and shipping functions, seriously hampering their responsibilities.

### Solution

Microsoft® Business Solutions Retail Management System and WineClub Manager™ by Elypsis tie together billing, shipping, and inventory functions for an easy, accurate, and responsive operation.

### Benefits

- Time savings of 40 percent
- Easy-to-sort customer database updates instantly
- Inventory reports reveal successful products and promotions
- Shipping requests automatically sent

## Winery Manager Labels New System a Vintage Time-Saver

“Our system from Microsoft and Elypsis is a dream come true. Everyone in the sales and accounting process has instant access to customer information.”

*Kelly Murray , Tasting Room Manager, Cosentino Winery*

As a professional wine club administrator, Debra Heidary was accustomed to high expectations of management and customers. “Wine connoisseurs are discriminating,” she says. “They notice and value small differences in wine, wineries, and quality of service.”

At other vintners, Heidary had experienced the crush of managing her work without an efficient and flexible retail management system. So she was delighted to find that her new employer, Cosentino Winery in Napa Valley, California, had chosen Microsoft® Business Solutions Retail Management System.

As Cosentino’s burgeoning wine club surpassed 1,200 members, administering it could have drawn Heidary’s time from customer interface and promotion. Instead, she employs a well-organized and time-thrifty system that streamlines her work. She credits the Microsoft solution with giving her back 40 percent more time. “And 100 percent more patience!”



## “[This solution] is truly streamlining the way we manage our wine club and retail sales program.”

Kelly Murray , Tasting Room Manager,  
Cosentino Winery

### Situation

Located on State Highway 29, Cosentino Winery is one of the first vintners on the way north into California's famous Napa Valley. The facility produces more than 40 award-winning premium wines including Cabernet Sauvignon, Zinfandel, Chardonnay, and Merlot. Its chateau-style main building houses the winery's offices, production facilities, a tasting room, and a well-stocked gift shop.

Because of its reputation for its labor-intensive, handcrafted winemaking, Cosentino has cultivated a loyal and demanding clientele, many of whom join one of the company's wine clubs to receive monthly shipments of the vintner's recommended specials. Far from a generic membership, members tailor shipments to changing wine preferences, shipping dates, summer and winter addresses, and differing payment methods.

### Servicing a Demanding Clientele

“In my business, customer service has to be on a par with the high quality of wines we sell,” says Heidary, “so my job is very time- and labor-intensive.” Heidary acknowledges that without Microsoft® Business Solutions Retail Management System, headaches would have multiplied.

“We have 23 different categories of customers,” she says, “some monthly, some bimonthly, three membership levels, and everyone has to be serviced perfectly. On top of all that, their addresses change, credit card numbers go out of date—and the system has to let everybody from shipping to bookkeeping know about every change.”

### Time is Money

Additional staff would not have been the way to keep up with all that work. “Training in wine club administration isn't fast,” Heidary

says, “and labor expenses would have cancelled out any gain.”

Besides the hours involved in updating databases and keeping tight track of customer shipping requirements, Heidary had previously found inventory tracking would siphon away her efficiency.

“In my previous company, every time we sold a gift basket with 15 items,” she says, “we had to go into inventory and manually debit each item individually. That took us forever and mistakes were inevitable. This meant long hours in stock reconciliations.”

“I truly love this business,” she says, “but without a good system, you feel like a grape in a wine press!”

### Solution

“Marketing, credit card handling, inventory, data integration, purchasing, reporting, customer relations—there are a lot of areas a club administrator needs help in,” says Heidary. “Microsoft Retail Management [System] is not just any solution. It addresses every one of our concerns and resolves them with efficiency, simplicity, and speed. That's what I call a thorough solution.”

Cosentino installed the new system in June 2004 at Cosentino Winery and Crystal Valley Cellars. Installation included WineClub Manager™, written by Elypsis, Inc., a Microsoft Certified Partner. “This enhancement cuts days off club processing every month,” Heidary says.

### Customer Database Accuracy Is Vital

Heidary also believes that frequent, efficient updating of customer records is essential to a practical retail system. “Microsoft Retail Management [System] lets me stay current,” she says. “We change a record in one spot and it propagates through the entire system. Rejected credit cards are automatically

“Inventory counts are precise and I can get an instant report. I know exactly what we have on hand and what we need to order. I know what’s selling and what’s not as hot this season...”

Debra Heidary, Wine Club Administrator,  
Cosentino Winery

updated. And changes I make in the back office are instantly visible up front and go into transactions by sales associates. The constant communication is fantastic!”

The newfound simplicity of customer database operation even extends to shipping. “I create shipping orders and send them to the mail room electronically,” Heidary says. “Unlike my old system, notes don’t get lost in transmission or tossed out. Everything is on the screen—everybody’s screen.”

#### **Tight Inventory and Record Keeping**

Microsoft Retail Management System also tracks perpetual inventory for six warehouses and locations. “It’s great,” says Heidary, “I can pull histories from previous products and put them into a single, cohesive business framework. I can teach it to others because it has a cohesive look from end to end. WineClub Manager blends into the parent product so smoothly that I don’t see any seams. I can even add new items to my product list in any order.”

The Microsoft Retail Management System reports functions get constant exercise.

“I use my report functions to generate daily sales numbers by date, dollars-over-cost analyses, even item and vendor lists,” says Heidary.

“On top of that, customers love to know their sales history so they can reorder their favorite wines. In just two seconds, even the cashier can call up that information at the POS [point of sale]. With so many wines, it’s hard for a customer to remember which one they gave to whom, and which ones most fit whose palates.”

Heidary uses the system to call up customer status or do bulk e-mailing to notify clients of ongoing or upcoming promotions.

“You really see the difference on the bottom line,” Heidary says. “So this is time well spent, especially when we can handle these chores so fast.”

#### **Benefits**

“Wow, what a difference!” says Heidary of her typical workday. “Now that I really have my finger on the pulse, a wine club is much easier to run. Inventory counts are precise and I can get an instant report. I know exactly what we have on hand and what we need to order. I know what’s selling and what’s not as hot this season, which of course is the key to marketing. And shipping nightmares have become a dream.”

Kelly Murray, Tasting Room Manager at Cosentino, uses Microsoft Retail Management System and WineClub Manager combination daily for retail sales. “[This solution] is truly streamlining the way we manage our wine club and retail sales program,” she says.

System compatibility with other software is gratifyingly smooth. “Most of what I do is in Microsoft Access or Excel,” says Heidary, “but I also use mail merge constantly and the integration is seamless.”

#### **Unexpected Benefits**

Besides the added convenience of taking care of all of Cosentino Wine Club’s operations under one easy-to-run system, Heidary now finds certain formerly time-guzzling areas far easier to operate.

“Today I selected 551 customers from 14 categories, all with different types of orders,” she says, “and I invoiced the whole group in one hour!”

“Our system from Microsoft and Elypsis is a dream come true,” adds Murray. “Everyone in the sales and accounting process has instant access to customer information. We can call

“I can’t believe how much more useful time I have with this system. Instead of disentangling paperwork problems, I spend my time making clients happy.”

Debra Heidary, Wine Club Administrator,  
Cosentino Winery

up daily sales information, check product availability, produce custom reports, and create new customer profiles—all at the click of a mouse.”

An unexpected benefit was response time. “When I need something,” Heidary says, “it’s there. I never wait and it’s never hard to find.”

#### **More Time for Your Customers**

The true winners, of course, are the members of Cosentino’s Wine Clubs. “I can’t believe how much more useful time I have with this system,” says Heidary. “Instead of disentangling paperwork problems, I spend my time making clients happy. With a file on every customer, we service them to a tee and they love it!”

Currently, Cosentino is installing eWinery™ by Elypsis, a complete winery management enhancement for Microsoft Business Solutions-Navision® software. This seamlessly integrated package will eliminate the need for staff to work in three separate software systems, further cutting down on administrative click count.

Heidary also has her eye on Web site integration. “That’s down the road,” she says, “but not that far. This system will give me the time to do it!”

Heidary suggests that other retailers who are considering a POS upgrade should “First, think of your customers. Make sure it is fast and snag-free, especially at the checkout counter. Second, go with the one that encompasses the highest number of your team’s repetitive chores—and that is user-friendly.”

“With Microsoft Retail Management System and WineClub Manager,” says Heidary, “you don’t face agonizing choices like red, white or rosé. You get it all!”

## 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 Elypsis, Inc. products and services, call (707) 257-8912 or visit the Web site at: [www.elypsis.com](http://www.elypsis.com)

For more information about Cosentino Winery products and services, call (800) 764-1220 or visit the Web site at: [www.cosentinowinery.com](http://www.cosentinowinery.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)

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Document published November, 2004

### Software and Services

- Products
  - Microsoft Windows 2000 Professional
  - Microsoft Windows Server™ 2003 Standard Edition
  - Microsoft Windows XP Professional
- Solutions
  - Microsoft Business Solutions Retail Management System
  - Microsoft Business Solutions–Navision software

### Third Party Software

- Elypsis WineClub Manager™
- Elypsis eWinery™

### Hardware

- Dell Server PowerEdge 1600SC
- Dell OptiPlex PCs
- Epson T88 printer
- Symbol scanner
- MMF cash drawer

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