



# VINELAND ESTATES TOASTS THE MERITS OF SAGE 300

Winery increases revenues and reduces overhead



## Customer

**Vineland Estates Winery**

## Industry

**Distribution**

## Headquarters

**Vineland, Ontario**

## System

**Sage 300**

Nestled in the heart of the Niagara wine country at the site of an historic Mennonite farm is Vineland Estates Winery. The winery produces 47,000 cases of wine each year from grapes grown in its 150-acre vineyard and surrounding farms. Wine is shipped across Canada and to more than a dozen other countries, where it has won numerous domestic and international awards. The winery's tasting room, restaurant, and exclusive wine club ensure Vineland Estates wines are enjoyed by enthusiasts locally and around the world. The wine industry is complex and highly regulated and faces unique business challenges; Vineland Estates Winery meets these challenges with the power of Sage 300.

## Meet business challenges

Allan Schmidt, president of Vineland Estates Winery, and vice chair of the Wine Council of Ontario, explains some of the challenges his industry faces: "We are regulated by a number

of agencies, and each requires detailed reports concerning our production and distribution. We also need accurate field-to-glass cost information."

Sage 300 software fully supports Vineland Estates Winery's requirements. "It is a solid and powerful platform that meets the majority of our needs out of the box, and we have been able to tailor it to meet all of our industry- and operation-specific needs."

## Effective inventory control

"One thing that our Sage 300 software does particularly well is give us the real-time inventory numbers we need to make informed day-to-day decisions," says Schmidt. The software maintains highly accurate figures for quantities on hand, on order, and available to sell. This data helps ensure that the winery's customer service staff can give accurate answers to customer inquiries and that online visitors can query the



winery's collection quickly and easily. "Our mobile salespeople also access the application and can obtain live inventory numbers and place new orders," adds Schmidt.

As orders come in, picking sheets are printed at the winery's off-site warehouse. There the order is picked, packed, shipped, and acknowledged within the Sage 300 application. Then the shipping notice is available to the accounting department for production of invoices.

"It is very efficient, and inventory is updated in real time. We can effectively process 100 or more orders each day with a small staff," says Schmidt.

## Accurate costing

Another strong suit of the Sage 300 application is the ability to accurately account for costs. The winery uses the bill of materials functionality to capture the accumulated costs of bottling, corking, and labeling its product. "Our ability to account for all the production costs helps us to set fair-value pricing for our various products and distribution channels," says Schmidt.

## Compliance simplified

Eleven separate taxes are assessed on Vineland Estate Winery's products by various governmental agencies. "Each tax is calculated differently; some are per bottle, and others are per liter," Schmidt explains. "There is a recycling fee that varies by the bottle size and environmental fees as well."

The winery's Sage business partner works closely with the company to develop customized reports and functionality to meet its unique requirements. "We are audited several times a

year to ensure compliance. It would be extraordinarily difficult to comply without a system like Sage 300," says Schmidt. "We have developed a routine that queries our Sage 300 database and generates the tax remittance forms. Now we have a reputation among the auditors for having accurate reports. Audits used to take five to six days to complete; now the auditors are in and out in less than two days."

## Flexibility to grow and expand

The company operates a Wine Club, where members pay a flat monthly fee to have bottles of Vineland Estates wine delivered to their homes. The program quickly caught on, and now boasts more than 1,000 members. Most members pay their monthly fee by credit card.

Vineland Estates Winery was able to tailor its Sage 300 application to support the activities required to maintain the Wine Club.

"Previously, we had to enter all the orders and process all the credit cards manually," recalls Schmidt. "Now the system automatically generates the monthly orders, creates new orders that come in from our website, processes the customers' credit cards, and sends a confirmation email. What used to consume seven days out of every month now is accomplished in just two hours!"

Schmidt reports that the time and labor savings as a result of Sage 300 are significant: "Since we implemented our new Sage 300 solution, we are saving 20 to 30 hours each month in accounting tasks, and we have increased revenues."

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