

Wineries Share Their Point-of-Sale System Priorities and Experiences

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by Barbara Barrielle

Point-of-Sale systems in wineries seem to be a love-hate relationship...many times the hate overcoming the love as the frustrations of adapting to changing and challenging environments puts a strain on winery personnel and the electronic retail and data system that supports their efforts.

"I have worked with all of the major ones from VinNow, to E-Winery Solutions, to Vin65, to WineDirect, B-Loyal, AMS, Nexternal, and now E-Cellars. The needs of every business component of your winery must be considered," says Jim Morris, vice president of hospitality and events at Charles Krug.



Jim Morris

"From the process of gathering and sorting data, simple to complex report generation, easy transactions including mobile and online ordering, checks and balances like ShipCompliant, and comprehensive tracking and order history functions. Stability of platform and a long list of satisfied customers and an active user community are pluses."

With many wineries focusing on consumer experience in the winery and direct-to-consumer selling and marketing because profit margins are higher than the three-tier system, effective POS systems are crucial. And the needs of a winery vary depending on size, case production, complexity of the tasting room and tasting experiences, and the number of employees that must use and implement the system.

In Napa, at **Alpha Omega Collective**, which is made up of the 15,000 case **Alpha Omega Winery**, 20,000 case Tolosa Winery in San Luis Obispo and 6,500 case Spain-based Perinet, which sends 4,000 cases to the States. They use WineDirect and Paul LaRose oversaw the migration in 2015. The winery subsequently lured Tim deciding on a POS system but the key priorities are a) reliability and dependability, b) consistent performance without lags or delays and c) speed of workflows. The POS has to be an extension of the tasting room staff's hands."

"We have a very active and loyal wine club," LaRose, the Omni director of sales, points out. "DTC makes up over 90% of **Alpha Omega's** overall business and 70% of Tolosa's. Of the Perinet wines shipped into the U.S., 85% of the revenues are from DTC. Data capture is just as important as sales and hospitality in our winery. At **Alpha Omega**, having a winery in the heart of the Napa Valley on Highway 29, acquiring accurate data is how we grow and expand."

At the smaller, 2,500 case winery 32 Winds in Dry Creek Valley, Winery Manager Liz Findeiss has a list of what she is looking for in a POS System, "I value the ease of training new employees, Customer Relationship Management, the ease of running wine club cycles with multiple club variants, credit card updating capabilities, the ability to host and sync with online store/website, prompt customer service, and automatic order submittal to fulfillment house."

At Charles Krug, they produce 60,000 cases a year and currently have E-Cellars as their POS system. "The ability to generate data and have robust analytics is critical. From simple information like all buyers in a region to anyone who has purchased a Cabernet in the last two years," says Jim Morris. "The ability to pull solid data from the system is critical."

While there have been solid improvements in POS systems in the last few years as they have specific requirements for wineries like state-to-state licensing and shipping procedures as well as the myriad of sales channels wine is sold through and the continued growth of direct-to-consumer selling, there remain stumbling blocks for wineries at all levels.



Paul LaRose

At Alpha Omega, LaRose points to one shortcoming, "I'd like to see the ability to split sales channels within one order. For example, if you have a wine club member order six bottle of wine in addition to their regular six bottle shipment, having the ability to ring up six bottles under Tasting Room and six under wine club in the same order would be ideal.

"This gives you clean and accurate reporting within your sales channels in which you can scale and grow utilizing 'clean' data. Also having clean and precise orders spread among your sales channels creates less internal politics and distractions while creating more focus on top line revenue and bottom line awareness."

At 32 Winds Winery, Christine Bizzell points out issues with their current system, "The eCommerce and email marketing components are a problem. In addition, we've experienced bad user experience, low engagement with email campaigns and low web sales."

Morris says he is frustrated with Krug's system's mobile POS components and lack of a fully-cooked email system. He sums it up by saying, "I have been through many POS decision making processes and it seems the latest, newest shiny thing rarely lives up to its promises. Winery POS systems are very complicated beasts and there are many business functions that must be fully integrated into them.

"They also must work with larger accounting programs so data passes seamlessly into the financial part of the business. And they MUST have extraordinary customer service, online chat windows and comprehensive ongoing training."

Alpha Omega's Powell, formerly with a POS supplier says, "The POS and eCommerce industry is very competitive these days. We'll always assess our ROI and keep a finger on the pulse of the new and up-and-coming solutions out there," he continues. "We value stability, reliability, performance, and ease of use. We also value a good partnership composed of solid communication, excellent customer service, and an understanding of our business needs.

"When your partner is 'all-in' and when the effort is there, you can feel it. It makes all the difference in a successful, long-term partnership."



Tim Powell

Point-of-Sale Systems

ACTIVE CLUB SOLUTIONS

Active Club Solutions, Inc. is a leader in tasting room technology, offering cutting-edge solutions for managing and growing your wine sales since 2003. We offer an iPad winery POS, the best wine club software and winery ecommerce integrated in one solution. Active Club's support, training, and services are world class. As a company and a team, we are invested in our clients' success and growth, as we grow with them. Our clients' needs are our first priority, and define how our technology and services evolve.

MICROWORKS WINE SOFTWARE

Founded in 1991, Microworks found its niche in the Wine Industry after providing consulting services to several wineries in Northern California to help them find more efficient ways to manage their tasting room sales, wine clubs and shipping processes. Previous to the Wine Industry, Microworks provided automated retail solutions for specialty gift shops around the US, Canada, and Pacific rim. Microworks commitment to developing and continually improving its products has made them a leading and well respected provider of Direct Sales Management software. Our commitment to quality and customer success has proven valuable for our customers.

NEXTERNAL

We are a web-based sales technology platform, which supports online, POS, and club transactions for wineries of all sizes. Our comprehensive suite of business tools will help wineries sell more wine through the direct to consumer channel, while streamlining their fulfillment process and overall data management.

ORDERPORT WINERY SOLUTIONS

In May of 2002 OrderPort started out as an eCommerce company specializing in integrating with warehouse and fulfillment systems. Ten years later, in 2012, partners Matt Payne, Stephen Ratzlaff, and Rick Belisle decided to follow their passion for wine and came up with OrderPort Winery Solutions. From there, OrderPort created the wine industry's first iPad based POS system. This system acts as a hub for wineries, integrating four to five systems into one cohesive, easy-to-use system.

360WINERY

360Winery is brought to you by a committed team that is led by the seasoned entrepreneur, Achamma Mathews. A wine connoisseur herself, Achamma is a visionary with 3 decades of experience in developing software products for the food and agriculture industry. Achamma worked closely with Australian wineries to release the first version of her winery software in 2005. She has now rolled out the upgraded 360Winery software with unique features to help winery owners and managers around the globe run their wineries efficiently.

TROLY

TROLY Solution will help your winery increase your sales and your margins by helping you manage the inventory, DTC, wine club, fulfillment, reporting, and accounting. Troly is more than an advanced software. It will allow you to optimize your Direct Sales and save a lot of managing time, save on shipping and credit card fees, help you manage your inventories and integrate your "Point of Sale (POS)" (on tablet and mobile), can automate your marketing emails, credit card verification before shipping and will be integrated into your website. Also, everything can be connected to your accounting software.

TRUVI COMMERCE

Our cloud-based platform allows you to manage your direct-to-consumer (DTC) business across multiple sales channels (ecommerce, POS, and wine club), all while enjoying a single view of the customer. With simplyCMS as its foundation, the company has been around for many years and our existing customers come in all shapes and sizes, from small wineries to large multi-brand/multi-site wine businesses. Our platform includes everything you need to provide an excellent experience for your customers: content management, CRM, marketing tools, ecommerce, wine club, a contemporary mobile point-of-sale, an advanced shipment manager, and compliance tools.

VINSUITE

It began in 2003 when Richard Kline founded eWinery Solutions, a software platform designed for wineries of all sizes. When building this business, he met with hundreds of winery owners to carefully assess their eCommerce and wine clubs needs. As one of the largest winery solutions providers, vinSUITE is comprised of over 30 professionals, many with dozens of years in the industry. Our dynamic support and professional services teams set us apart from our competitors. And our dedicated account managers ensure our clients receive the utmost attention. Over the years we've helped wineries of all sizes and experience levels grow their DTC business.

VINTEGRATE

Our Vintegrate Division is devoted entirely to the wine industry – wineries (small boutique to those producing 5 million+ cases), custom crush facilities, fulfillment houses, tasting rooms and wine shops. We've designed our Vintegrate Software Suite to make your business more profitable. We know you are tired of systems that don't work together and the additional staff time required to bridge the gaps. We've built an end-to-end solution in Vintegrate so you can have all the tools you need from a single vendor solution AND we've built an integration engine to give you the choice of a multi-vendor platform where everything communicates.

VINTERACTIVE LLC

VinterActive's **SecureWineShop™** all-in-one wine sales software helps you sell more wine by accepting secure payments via website, smartphone, tablet and even your Facebook page. This proven cloud-based ecommerce solution is **PCI-DSS validated** and uses tokenization technology to maximize customer security, reduce liability and simplify reporting requirements. Based on more than a decade of wine industry experience & customer feedback, SecureWineShop offers a shorter path to purchase, more powerful marketing features, and more advanced management tools than any solution available to the wine industry today.

WINEDIRECT

Our goal is to help wineries sell directly to consumers in the way that works best for them. Today, we do that by providing our clients with end-to-end sales solutions—from ecommerce to fulfillment—as well as educational materials designed to help them grow. It lets you reach new customers, engage current ones, and keep more of your profits. But to really excel, you need to also meet your customers' sky-high expectations for service and delivery. Convenient ordering, great customer service, speedy delivery, and impeccable accuracy are all par for the course these days—and the stakes are only getting higher. As the only company providing end-to-end DTC sales solutions, we're the partner who can help you exceed their expectations at every turn.