

# direct to consumer

## Product Review:

# POS Software

Choosing the right POS system can help wineries streamline their tasting rooms to maximize profits

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**AS TECHNOLOGY HAS** taken hold of the tasting room, efficiencies have abounded. What used to be a paper-intensive system based on the humble cash register has morphed into a variety of sophisticated solutions based around the latest in technology. Point of sale (POS) is just a piece of the bigger, direct to consumer puzzle but is extremely important, nonetheless. It allows wineries to organize and streamline their tasting rooms and to manage wine clubs and e-commerce sites in a way that maximizes profits.

Whether large, small or somewhere in between, almost all wineries are embracing POS in new and innovative ways. *Wine Business Monthly* has taken on the task of sifting through the multitude of choices to help wineries find the solution that is right for them based on the set of parameters most important for their business model.

### USAGE SCENARIOS

Traditionally, POS software has been used almost exclusively to ring tasting room sales. But as wineries have grown, adding elements like wine clubs and online stores, POS has begun to play a more important role. When integrated into all levels of the sales process, POS can improve the efficiency of an already profitable sales channel by automatically calculating sales and generating records and reports for tracking and inventory purposes.

Given that, once a winery implements a basic POS system, they soon realize that integrating POS with every-

thing else—including their online store, wine club, allocations, accounting, inventory, customer database and shipping compliance modules—is the ultimate destination.

There are close to 20 true POS software vendors in the market today. Weeding through the lot to find the right solution can be overwhelming. To alleviate some of the confusion, we've taken a look at these products to illustrate their similarities and their important differences.

### WHAT POS SOFTWARE DOES

Because there are numerous commonalities to POS software, customers can expect almost all vendors' solutions to do the following:

- Ring sales at a register-like station
- Have a discounting routine that automatically deducts from a customer's purchase whether online or at the tasting room
- Have data-capture capabilities including customer's name, phone number, mailing address and email address. Some products are capable of capturing data via driver's license or credit card.
- Track customer metrics like buying patterns and preferences
- Track and adjust inventory

Conversely, offering high levels of customer service to winery clientele is also of the utmost importance. Regardless of size, wineries do not want to have tasting room visitors stacked up at the registers waiting to make a purchase.

Transactions need to be fast and easy, and the right POS product can make all the difference.

Wineries still using a cash register-based system are jumping on the POS bandwagon quickly for obvious reasons. **Jim van Lobed Sels** is the general manager for Spokane-based **Arborcrest Wine Cellars**. When tasting room traffic grew to 30,000 visitors per year, his winery knew it was time for a change.

"We looked at what tools we could use to show a profit in the tasting room since that end of our business had grown so quickly," said van Lobed Sels. "The cash register didn't give us enough information on what was selling. Our new POS solution, **VinBalance**, is very detailed, which helps us provide a higher level of customer service to visitors to the tasting room because we can pull up that customer and know what they've purchased in the past."

But even wineries with some form of a POS system in place are looking to do better for their customers. **Jessup Cellars Winery** in Yountville, California switched from a POS system based around a popular accounting package to **Winery Direct** from **Microworks** to add efficiency to a cumbersome process of hand-entering credit card numbers each and every time. "Now, once we've entered a credit card number, it stays in the system which speeds up the sales process for our customers to the tasting room," said **Danielle Kneifel**, director of hospitality.

Because the POS software available today has so many elements in common, wineries researching new solutions will want to consider where these solutions differ to help guide their decision. To begin, they'll need to analyze what factors are most important to their business and choose from there. For instance, is integration with other modules like wine clubs and online stores important? Or, for wineries that do a fair amount of business off-site, would a web-based solution be the way to go? To follow are the three most important attributes to consider when shopping for POS software.

### POS, Wine Club and Online Sales System Integration

As wineries become more sophisticated about marketing, they are discovering that integrating sales in the tasting room with online sales and those from wine clubs is critical to business. This is as important from a marketing perspective as it is for inventory control.

Integrating the POS/club/online sales systems enables the winery to have one database with all customer information. Having a single customer database has important benefits. One is the elimination of data input mistakes. When working across more than one customer database and/or sales channel, even the most conscientious and well-trained workers can make mistakes. Additionally, opportunities for specialized customer service can be lost if the tasting room employee is unaware that

**POS Software Use in Tasting Rooms**

CHART 1

Does your winery use a POS software system in the tasting room or a mechanical cash register?

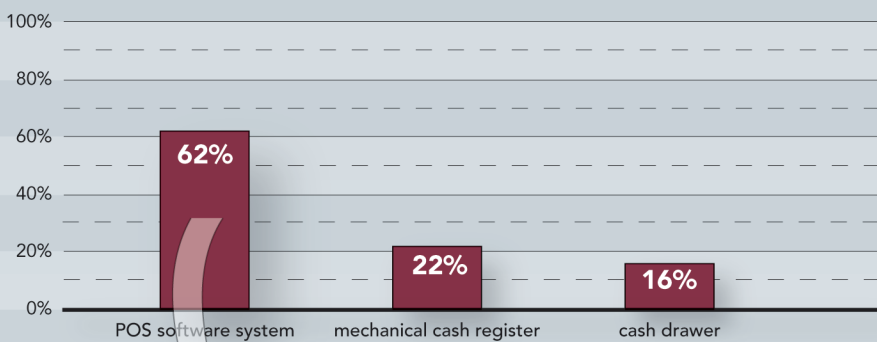


CHART 2

If yes, is it **integrated** into other software systems in the winery or is it **stand alone**?

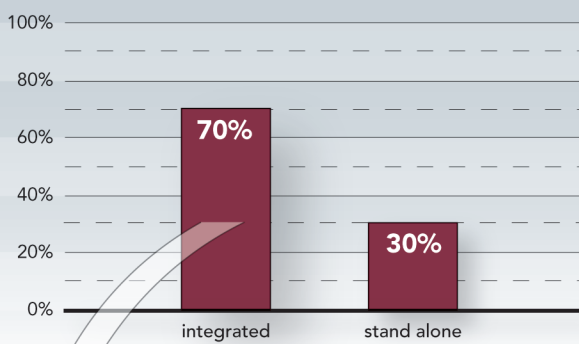
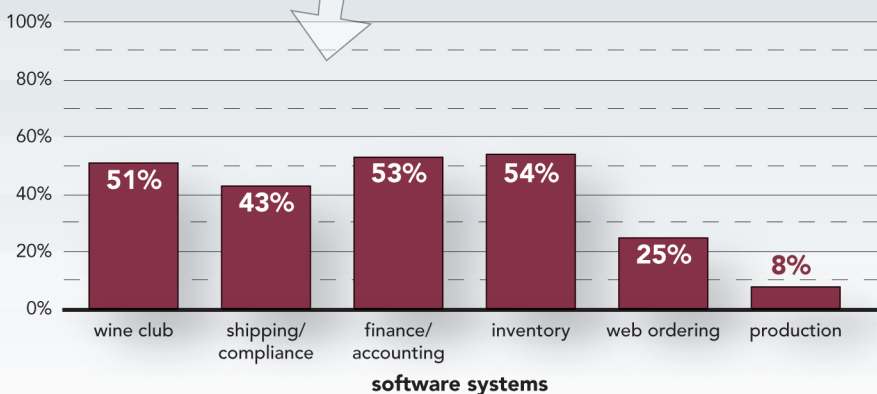


CHART 3

If your POS software is integrated into other systems in the winery, please indicate which systems (check all that apply)



2009 WBM Tasting Room Survey

a visitor is a long-time club member or makes regular monthly purchases from the tasting room.

Integrating databases throughout the sales channel allows easier tracking of customer purchase history and increases opportunities for personalized customer service. It is also less difficult to integrate additional modules into the system (think inventory control, e-commerce or multi-site support as the winery's needs grow).

"We chose a Web-based solution from **Submerce** because it offered an all-in-one solution that integrated our POS, e-commerce and wine club systems," said **Andrew Leckey**, the business technology manager for **Newton Vineyards** in St. Helena, California. Leckey calls this ability the "holy grail" since it means the winery can capture customer information no matter where a purchase is made—be it at the tasting room, online or through the club.

Database integration is one of the more important aspects of choosing a wine club program, especially in terms of user-friendliness. Even conscientious and well-trained employees can make mistakes when they are working with two, three or more customer databases across several sales channels. Additionally, opportunities for specialized customer service are lost if the tasting room employee is unaware that a visitor is a long-time club member or if a wine club manager doesn't know that a member also makes monthly purchases from the tasting room.

"Previous to the wine club software, we had been doing manual charging and maintenance of the club just through our POS software and paperwork books—which was massively time consuming," said a New York winery's tasting room manager, who is using **WineClub Manager** from **Elypsis**, which also provides the winery's POS system.

Integration with the POS, Microsoft Store Operations Manager, was the feature that was most important to her, in conjunction with secure credit card storage and fast charging, which she said couldn't be accomplished without integration with their POS.

**ACCOUNTING SYSTEM INTEGRATION**

Wineries have also found it extremely helpful to integrate sales with accounting. Unfortunately, wineries are occasionally locked into the accounting department's preferred software rather than what might work best for tasting room staff or wine club managers. Similarly, the accounting department might find other systems difficult to work with or from which to extract data. For this reason, wineries need to consider how a POS program will fit within the overall office framework across all departments before making a decision.

Such was the case with **Flora Springs**, based in St. Helena. Wine club manager **Kenny Werle** said his accountants were "really picky" about the reports they wanted to receive. "We chose a vendor that could provide a system that was completely customizable for our needs so we can give accounting the types of reports they want," said Werle. Flora Springs is using

**eCellar** from **Missing Link Networks, Inc.**, a Web-based solution that helps tie together the wineries three physical locations, streamlining sales from multiple channels as well as those from their wine club.

Other times, integration is a key aspect when a winery is planning to grow. "We do most of our sales through the tasting room, and in order to position ourselves to grow, we had to upgrade from our cash register system," said **Lou Facelli**, owner and winemaker at Woodinville, Washington-based **Facelli Winery**.

"Winery Direct from Microworks helped us organize our business and move away from the slips of paper we'd been accumulating. Now, we can put more people through the tasting room because things run smoothly. Inventory is now done in 10 minutes. And even though our systems are currently separate, ideally we'd like to tie them together for enhanced efficiency. For a company of just four people, that frees up a lot of time to do something more productive."

If the winery chooses a POS system from a different vendor than the one that provides their club/online sales/systems, the winery needs to make sure that there is some level of compatibility between the wine club software and the POS system. Even if full database integration would be impossible, a robust tool for importing and exporting data would reduce the number of issues of maintaining different systems.

**Compliance**

To return to the issue of integration for a minute, let's say that a customer in the tasting room is looking to buy some wine and ship it to his home state. Unfortunately, he neglects to mention that he's already received a shipment at home (in the same state) via the wine club.

Shipping compliance being what it is, this is a sticky issue and one that wineries deal with on a regular basis. By having an interface between a sales database and the shipping compliance module, staff in the tasting room will instantly know that this customer has exceeded his shipping allotment for the month and make recommendations as to how to best accomplish this pur-

chase. That's the beauty of a fully integrated, intuitive system.

**Casa Nuestra Winery & Vineyards** in St. Helena is using **Winery Pro** from **Technology Consulting Alliance**. According to **Stephanie Trotter-Zacharia**, director of sales, the program is compliant with features that help her know what to do when shipping anywhere in the country, including automatically calculating and adjusting sales tax rates.

Similarly, **Monica Smith** is the tasting room manager at **St. Francis Winery and Vineyards** in Sonoma Valley. She is using Napa Valley POS and said that the real-time compliance module built into the software makes it easy and foolproof to get this oftentimes thorny aspect of sales correct each and every time.

### WINERY SIZE

It's safe to say that no two wineries are alike. Many larger wineries already have a POS system in place but are driven to upgrade simply to stay ahead. Smaller wineries may be looking to stay lean, making small batches of handcrafted wines but using sophisticated software that can run operations as well as the big guys. Still others come to the game with a definitive plan of growth and choose a solution that can meet the challenge.

### Poised for Growth

**Brian Roeder**, president of **Barrel Oak Winery** in Delaplane, Virginia, had just such a strategy in mind. His winery opened last year and is expected to grow from 3,000 cases to over 10,000 over the next seven years. After doing some online research and attending a winery-specific tradeshow, Roeder chose **SmartPOS** from **WineWare**.

"This solution is specialized for wineries and is intuitive and easy to use," said Roeder. "Our winery has done an enormous amount of retail sales in 11 months due, in large part, to our online marketing. This level of growth is unprecedented in Virginia, and because of our success we'll be opening two more tasting areas soon. WineWare is developing a system that can accommodate that growth as well as where we go in the future."

### Small

**Tiny TreAnelli Wines** in Los Olivos, California produces 2,000 cases each year and has no plans for immediate growth. Since its installation, **VinNOW** from Update Software has met every need of tasting room manager **Janeen Garcia**. "With **VinNOW**, I'm able to see each customer's history through one screen, which simplifies marketing," said Garcia. "It's a very user-friendly program with a variety of reporting features and customer database options that is perfect for a winery our size."

### Medium

Columbia Valley's **Barnard Griffin Winery** in Richland, Washington makes about 75,000 cases annually and uses **VinBalance** software for a solution that handles POS in the tasting room as well as their wine club.

Tasting room manager **Kim Gravenslund** said the previous system consisted of a cash register for retail sales and a self-made spreadsheet product to manage the wine club. It was anything but sophisticated.

"We literally went from the Dark Ages into the 21st century," said Gravenslund. "Installing **VinBalance** has brought efficiency, accountability, tracking by way of reports and inventory control."

Gravenslund added that she loves the product for its user intuitiveness, trackability and user-friendliness. "Integrating our tasting room sales, wine club and online sales was critical from an inventory control standpoint," said Gravenslund. "With **VinBalance**, we can now look up customer history in a flash. It provides us with a lot of necessary information in a very easy to use format."

### Large

For large wineries, a fully integrated system is often the best choice. **Cakebread Cellars** in Rutherford, California uses a solution from **AMS** to manage sales of more than 100,000 cases each year. **Cakebread** has no budget for advertising and, as such, relies completely on word-of-mouth marketing to sell wine.

Today, between 70 and 80 percent of **Cakebread's** sales are through restaurants. The balance is sold through the tasting room and to distributors who

sell to boutique wine shops in the Napa Valley only. (**Cakebread** isn't found in Costco or **Bevmo!**, lending an air of exclusivity to the brand.) A large-scale wine club is also part of the mix.

**Joe Martinez**, accounting and IT manager for the winery, said that **AMS** was already in use as a basic inventory and POS package (at the register only) when he joined the company in 1996. As **Cakebread** has experienced steady growth over the years—their wine club alone has grown from just 200 members to close to 10,000—they've expanded into a larger facility. Since **AMS** had always met their needs, **Martinez** decided to let the package grow along with them.

"The customers to our tasting room become our ambassadors," said **Martinez**. "We need to make the tasting room experience as smooth as possible so that positive word-of-mouth advertising keeps spreading."

Integration was a key factor as the winery was looking to link modules including purchase orders, MRP and inventory as well as accounts payable and accounts receivable. As a beta site for a compliance module, **Cakebread** and **AMS** learned a lot from each other, helping hone their solution further. Today, updated sales tax tables include information for city, county and state, simplifying shipping. A new shopping cart enhancement to **AMS** will be added shortly.

"We wanted a fully integrated system that could handle our volume," said **Martinez**. "**AMS** was already being used in house so it was a natural progression. As we continue to grow, **AMS** will grow along with us."

**Remi Cohen**, vice president of operations for **Merryvale Vineyards** in St. Helena, California tells a similar tale. The winery makes around 100,000 cases each year. They've used **Elypsis** for most of their software needs over the past 15 years because, according to **Cohen**, **Elypsis** is a local business and an industry leader in accounting software for the wine industry.

"Prior to 2005, we used an accounting software called **Solomon**, which was sold or leased to us and supported by **Elypsis**," said **Cohen**. "Although it was a simple product to manage, it did not integrate with our point of sale system or our accounts

receivable. In 2005, we decided to switch to a more integrated solution to handle our complex needs."

As a **Microsoft Gold Certified Partner**, **Elypsis** recommended that **Merryvale** convert to **Microsoft Dynamics NAV** (**Navision**) for accounting and **Microsoft Dynamics Retail Management System** (**RMS**) for point of sale. The products are integrated and incorporate both retail and wholesale sales with full financials that enable **Merryvale** to monitor allocations, depletions and inventory in multiple locations. The products also integrate well with other products from **Elypsis** including **WineClub Manager** and an online sales platform.

"We feel that the system is a robust data warehouse that has diverse and comprehensive capabilities as well as a lot to offer," said **Cohen**. "Working with **Elypsis** allows us to customize reporting to our specific needs which is important for a winery our size."

### WEB-BASED

Over the last few years, Web-based solutions have grown in popularity. For the non-technology inclined, Web solutions put IT issues on someone else's plate entirely, allowing wineries to simply make and sell wine. Web solutions also offer the latest in technology with instant upgrades and generally come with cool, edgy technology that can transfer readily to a customer's online store.

Web solutions are also built to integrate all operations including accounting, inventory, customer databases, POS in the tasting room, wine club and an online store. They are easy to install and use, offer great customer service and the potential for customized growth. They also offer the ability to sell from anywhere there is Internet access.

So if Web solutions are so great, why isn't everyone using them? For one, many wineries are limited by shoddy Internet access due to remote geography. Second, there's cost. Web-based systems typically have a low entry cost but then charge additional fees on top of the initial commitment and generally each provider has a different philosophy of how these charges are calculated. Wineries need to be aware

of how these costs add up or change as sales grow.

Finally, some wineries worry about security issues, sending and storing sensitive customer information like credit card numbers over the Internet rather than in-house. Credit card processing, whether in the tasting room or via a wine club or online store, is one of the most basic functions of selling wine but it is also one of the riskiest. Identify theft and credit card fraud has made protecting credit card information critical.

PCI compliance standards demand that companies follow a set of requirements or risk fines or even lose the ability to process credit payments. So wineries are extremely careful about handling sensitive customer data. But vendors of Web-based solutions are adamant that their systems are secure—and for wineries that do opt for this type of POS solution, it's a match made in heaven. **Jacques Mercier**, the proprietor and winemaker at **Solune Winegrowers** in Grass Valley, California, is using **WineWeb POS**. He said it gives him instant access to customer records, regardless of his location, even following his sales remotely.

"WineWeb helps us coordinate all three components of our business including the tasting room, wine club and our online store in one integrated all-in-one package," said Mercier. "And vendor support is great because software upgrades come to us automatically online. Even if we change computer systems we can still access the latest version of WineWeb. It meets our needs perfectly."

**Quintessa** in Rutherford, California is another Web-based POS success story. Consumer sales coordinator **Erin Lynch** said that that using eCellar from Missing Link enables them to integrate their tasting room with allocations. Before installing eCellar, Quintessa depended on a POS system in the tasting room and a separate back-end system to handle allocations, a growing part of their business. The problem, said Lynch, "was that the data lived in two different worlds. We had trouble merging the database from the tasting room to do an allocation," said Lynch. "Now, we use eCellar from Missing Link as our POS system in the tasting

room that integrates the back end for allocations. It works out much better because it really is all one system. It's a big help."

### BUYING

So far, we've sketched out the many attributes a prospective customer can expect to find when looking for a POS solution. Now, it's time to discuss the best options for the various situations and winery sizes based on what we've already learned.

Be advised that only a few vendors offer a truly complete out-of-the-box solution that integrates POS, wine club, e-commerce and email marketing. These include Elypsis, **EVT Solutions** and **WineWeb Enterprises**.

However, the remainder of the vendors offer efficient solutions to handle POS and available add-ons or integration with other third parties to take care of most other sales channel options. Many also offer modules or integration for accounting, PCI compliance, shipping and more.

Here, then, are *Wine Business Monthly's* recommendations based on size and/or situation:

**A large-scale winery** with a substantial wine club, high volume of tasting room traffic and a busy e-commerce site can benefit from a solution that is completely integrated. Integration across all sales channels brings a 'big picture' aspect to a winery rather than distinct departments working separately. Only a handful of vendors offer powerful robust software suites that can encompass everything from accounting programs, inventory control, shipping compliance, e-commerce applications and more.

**Smaller wineries** have quite a few choices when researching POS options. But what really matters is being able to build a customer database to market effectively and grow business; an efficient POS system in the tasting room is key to this effort.

Systems that are easy to learn and use are advantageous for tasting room staff. Speed is especially important when tour buses pull in and there are only two registers available to ring sales and capture customer information. A low level of integration between a club and

an online store is helpful but not a deal-breaker. Mainly, small wineries want customers buying and coming back for more.

**Wineries requiring a high level of flexibility** might consider a Web-based solution. As long as Internet access is reliable, a Web-based system has many advantages, including no investment in an IT infrastructure, automatic software upgrades, innovative technology, easy database integration, easy-to-access customer information and reporting capabilities from anywhere, easy coordination of tasting room, wine club and e-commerce site. This model also easily supports wineries with multiple locations as each site can tie into the off-site database simultaneously.

**Wineries that want consistency** should look for a vendor that provides a comprehensive software suite. Products that are integrated with one another and incorporate retail and wholesale sales, financials and inventory control across the entire sales channel are a solid choice.

### VENDORS

**Active Club Management** provides solutions as a service. Working with existing software, Active Club Management can be added on to process individual and multiple sales. The Active Club Management solution and team help wineries build a community of revenue-generating clients and streamline operations with seamless integration with **QuickBooks**, **ShipCompliant**, **UPS**, **FedEx** and **GSO** shipping (without any import/exports), print and email communications and more.

**AMS** offers the most complete suite of software available to the wine industry and the only full-spectrum solution crafted specifically for the wine industry. Working with their client base, AMS has developed a suite of software that is flexible, stable, comprehensive, scalable, powerful, well supported, economical and easy to use.

**CORESense** POS and Store Operations solution, a key component of CORESense's Integrated Retail

Management System, is a next generation, customer-centric point of sale solution for small to medium-sized retailers. It provides single and multi-store retailers with a feature-rich POS directly integrated with an end-to-end, centrally managed retail operations suite. For wineries, it offers shipping, a website, and wine of the month club administration with all transactions and corresponding data centrally processed and visible in real time across all stores and e-commerce and call center channels.

**Cypress Solutions'** Infinity POS uses Microsoft SQL Server technology at each POS terminal so that each terminal runs 100 percent independently and, using their patented Linker tool, exchanges data with the store server every 15 minutes enabling virtual real-time data with no single point of failure in the POS system. The Linker also handles multi-site communications in a chain environment. Head office personnel have access to the full point of sale data within 30 seconds of the sale being made at the POS terminal.

**Elypsis** is a leader in supplying wineries with integrated software solutions that optimize business operations and retail sales management. Products include accounting and financial management, inventory management, retail tasting room systems, and wine club management. Elypsis provides wineries with a comprehensive view of their business. Unlike older technologies or single stand-alone application products, Elypsis brings together the systems wineries need to remain focused on business performance, improve management insight, increase operational effectiveness and sell more wine.

**EVT Solutions** launched **bLoyal** (version 3.0) in March 2009 with a renewed focus on providing clients with the best multi-level loyalty platform across all sales channels. The goals of bLoyal are to enable retailers to increase their revenues by empowering them to: reach more customers through integrated multi-channel sales such as stores, Web stores, marketplaces and kiosks; sell more to each customer using automated multi-layer loyalty programs; process customer purchases

including single order and batch order processing as well as the most competitive rates for payment processing across all channels; gain customer insight with a consolidated online analysis of their customers, products and transactions information.

**Microworks Technologies, Inc.** offers an all-in-one solution to manage a tasting room, wine club, direct marketing, e-commerce and compliance seamlessly using Wine Direct 4.1. Wine Direct is a full suite of modules including sales and fulfillment, touch-screen POS, tax paid and bonded inventory tracking with allocations, wine club, customer relationship management (CRM), direct shipping compliance and reporting, and integrates with Microsoft Office, e-commerce, accounting systems and fulfillment houses.

**Missing Link Networks, Inc.**'s eCellar offers an integrated philosophy, not piecemeal, and is unlike any other system in the wine industry. It puts all of your customers and orders in a single, integrated database where they may be queried in unlimited ways for better marketing, merchandising and sales reporting, from anywhere at any time via the Web. Launched in 1999, eCellar™ has emerged as the first Web-based system that allows wineries to sell and market direct, covering all sales transaction points in real time.

**Napa Valley POS** is completely focused on providing POS solutions for Retail and the Wine Industry. Microsoft Dynamics Retail Management System®

(RMS) forms the foundation which is enhanced by developing add-on solutions to solve real-world problems.

**Orion Wine Software** is a leader in providing software and information services to the wine industry. As the largest provider, Orion Wine Software offers an all-encompassing suite of systems. Orion's core products represent some of the most well established wine solutions available. Now under one roof, Blend, WiPS, WIMS, Dar-Wine and POSR come together to create the most complete wine technology solution.

**Submerce** is designed from the ground up to manage winery and wine merchant models. With Submerce's "create once, use many" philosophy, customer accounts and product management is stored in one location and updated across a company's POS, OMS, e-commerce and wine club in real time. Submerce gives tools to manage e-commerce, wine clubs and CRM in one easy-to-use web application. Submerce has partnered with real-time compliance technology service providers to offer a seamless integration of their powerful state compliance tools with Submerce's available sales channels.

**Technology Consulting Alliance's Winery Pro** integrated point of sale system is built for easy use so winery staff (even the winemaker) can breeze through a sale. The POS transaction screen allows key entry of barcode scanning of products. If the product can't be located, the POS operator can conduct a quick search by product key-

words like description, type, price, vintage, unit price and more. No frustration punching multi-level button systems; winery staff will spend more time relating to customers.

**Update Software, Inc.'s VinNOW** is designed for wineries by winery owners. It features real-time wine club management, point of sale cash register functions (tasting room), customer contact information, accounts receivable and inventory. There are extensive sales reporting tools, including this year to last year comparison. With just a couple of mouse clicks, staff know where inventory is and its value. VinNOW is designed for a single stand-alone computer or a network multi-person operation.

**Ingio's VinBalance** winery software provides a complete suite that includes POS, wine club, winery production, production costing and full accounting. The whole winery team has a single, powerful yet easy-to-use tool for managing the tasting room and working together.

**WineWeb Enterprises** provides winery websites with an integrated winery-specific content management system, e-commerce services to accept and process customer orders online, email campaign services to easily create, send and manage broadcast emails to subscriber lists, eMarketplace promotion services to gain exposure for wines and a point-of-sale system for winery onsite sales processing.

**WineWare Software Corp.'s SmartPOS**, designed with touch screen technology for easy navigation, is a proven software application which may be customized for the retail sales in a winery tasting room. The POS application tracks inventory, sales and customers. SmartPOS is integrated with the SmartClub wine club system. SmartPOS is also integrated with QuickBooks and ShipCompliant, also for no additional fees. New items include EasyID scanner for age verification and driver's license information capture as well as pin pad entry devices with integrated signature capture capability so the credit card doesn't have to leave the customer's hands. Custom reports can also be generated.

### REVIEWING KEY BUYING ELEMENTS

Regardless of winery size, finding the right fit is critical. Many vendors offering POS solutions serve certain niche markets and are good at honing in on what's important to those market segments. Key elements when making a decision about what to buy include software and database integration, customer service from vendors as well as that which is given to winery customers, shipping integration as well as PCI compliance. A scalable system that can grow as a winery does is also critical. But whatever the case, perhaps most important is any vendor's strong, like-minded customer base which means better and faster software upgrades for all users. And this commonality among customers brings a level of comfort when committing to a purchase. **wbm**

# Product Review: POS Software

Company Name Location Phone Web site	Software Title	Pricing	Full suite*	Wine Club Integration	E-commerce Integration
<b>Active Club Management</b> Livermore, CA 925-447-2582 activeclubmanagement.com	Active Club Management	One time set-up fee of \$500. Takes 0.5% of sales through POS per month with a maximum of \$50.	Yes	Proprietary Wine Club Software	Yes, via WineWeb
<b>Advanced Management Systems</b> Santa Rosa, CA 707-539-7990 www.amssoftware.com	AMS Winery Software	Not available (NA)	Yes	NA by press time	Yes
<b>COREsense</b> Saratoga Springs, NY 866-229-2804 www.coresense.com	COREsense	\$15,000 for POS on unlimited workstations including set-up, data import, web site, wine-of-the-month club and email promotions	Yes	Proprietary Wine Club Software	Yes, own application included
<b>Cypress Solutions</b> Irvine, CA 714-389-6250 www.winerypos.com	Infinity	\$1,495 to install first terminal, \$995 for each terminal after that.	Yes	Infinity Wine Club and Vin65	Yes, own customizable application
<b>Elypsis Inc.</b> Napa, CA 707-257-8912 www.elypsis.com	Elypsis Retail for Wineries	Base POS is \$1,190 per register up to five, discount after that. Additional modules can be purchased separately.	Yes	Built on Microsoft Dynamics RMS	Yes, web service to eWinery Solutions web sites and file import/export for others
<b>EVT Solutions</b> Redmond, WA 425-860-1715 www.evtsolutions.com	bLoyal	Starting at \$1,190 per register, w/additional charges for multiple location wineries	Yes	Proprietary Wine Club Software	Yes, own hosted and can connect to any 3rd party through web service APIs.
<b>Microworks Technologies, Inc.</b> Napa, CA 877-642-7696 www.winesoftware.com	Wine Direct	\$1,495 for POS software integrating credit card processing and compliance checking	Yes	Proprietary Wine Club Software	Yes, through web services
<b>Missing Link Networks, Inc.</b> Calistoga, CA 707-942-9700 www.missinglink.net	eCellar	\$4,195 for licensing at one POS register and 2 virtual terminals, plus \$130 per month for unlimited application support and automatic upgrades and updates	Yes	Proprietary Wine Club Software	Yes, have own application
<b>Napa Valley POS</b> Napa, CA 707-320-2478 www.napavalleypos.com	Microsoft Dynamics RMS	\$1,190 per register plus Microsoft annual maintenance fee	Yes	Interface to Vin65, IBG, Submerce	Yes, interface to Vin65, IBG, Submerce
<b>Orion Wine Software</b> Santa Rosa, CA 877-632-3155 www.orionwinesoftware.com	Wims - Winery POS, POSR Retail Suite	\$3,000 to \$10,000 depending on winery size, configuration, number of users, options	Yes for Wims, No for POSR	Yes, built-into Wims, No for POSR	Yes, standard open interface used to integrate to many ecommerce providers
<b>Submerce</b> Napa, CA 707-255-4390 www.submerce.com	Submerce POS	\$4,999 for unlimited seats.	Yes	Proprietary Wine Club Software	Yes, built in
<b>Technology Consulting Alliance</b> Santa Rosa, CA 707-544-1559 www.winerypro.com	Winery Pro	\$4,800	Yes	Proprietary Wine Club Software	No
<b>Update Software, Inc.</b> Hopland, CA 707-744-1898 www.vinnow.com	VinNOW	Starts under \$5,000 for complete software package	Yes	Proprietary Wine Club Software	Yes, integrate with Kreck Design and VinterActive
<b>Ingio</b> Walla Walla, WA 866-993-1616 www.vinbalance.com	VinBalance Winery Software	\$5,000 to \$20,000 depending on number of users	Yes	Proprietary Wine Club Software	No
<b>WineWeb Enterprises</b> Santa Fe, NM 888-236-0058 www.wineweb.com	WineWeb POS	\$600 to set up and 0.5% of net sales, not to exceed \$50 per month. Additional modules can be added for an additional fee.	Yes	Proprietary Wine Club Software and also through Active Club Management	Yes, have own module
<b>WineWare Software Corp.</b> Paso Robles, CA 805-227-0202 winewaresoftware.com	SmartPOS	\$695 to \$995 for software, \$3,800 including hardware, training, tech support	Yes	Proprietary Wine Club Software	In process

\* (POS, Wine Club and eCommerce)

Accounting Integration	Plug-ins for gift cards	Multiple tenders on a sale	Touch screen capable	PCI Compliance	Compliance Integration	Platform	Database Integration
Yes w/QuickBooks, Business Works, General Ledger Accounting	Yes	Yes	No	Yes	Integrated	PC	SQL server/ Sybase
Yes, NA by press time	No	Yes	Yes	In process	Batch processed	PC	Pervasive SQL
Yes, QuickBooks	Yes	Yes	Yes	Yes	In process	Web-based	MySQL
Yes, QuickBooks, SAP, Great Plains	Yes	Yes	Yes	Yes	Batch processed	PC	Microsoft SQL server
Yes, built on Microsoft Dynamics NAV	Yes	Yes	Yes	Yes	Integrated	PC	Microsoft SQL server
Yes, QuickBooks among others	Yes	Yes	Yes	Yes	Integrated	POS is PC-based Add-ons are web-based	Microsoft SQL server
Yes, QuickBooks, PeachTree, SAP, AMS	Yes	Yes	Yes	Yes	Integrated	PC	Microsoft SQL server
No	No	No	Yes	Yes	Integrated	Web-based	Microsoft SQL server
Yes, Dynamics Great Plains, QuickBooks, MYOB, Peachtree	Yes	Yes	Yes	Yes	Integrated	PC	Microsoft SQL server
Yes for Wims w/PeachTree, Great Plains, Business Works, MAS, QuickBooks and more. No for POSR	Yes	Yes	Yes	Yes	Integrated	PC	Microsoft SQL server
Yes, QuickBooks, JD Edwards, SAP	Yes	Yes	Yes	Yes	Integrated	Web-based	Microsoft SQL
No	No	Yes	No	Yes	Batch processed	Mac & PC	FileMaker 10
Yes, QuickBooks complete API integration	Yes	Yes	Yes	Yes	Integrated	PC	Microsoft SQL
Yes, built in	No	Yes	Yes	Yes	Batch processed	PC	Microsoft SQL server
Yes, QuickBooks through WebConnect, PeachTree and more through an export file	No	Yes	Yes	Yes	Integrated	Web-based	Windows SQL server
Yes, QuickBooks	Yes	Yes	Yes	Yes	Integrated	PC	Microsoft SQL server

NOTE: Information for this table was provided by vendors.