

## Domaine Serene

**Overview:** US Winery

**Customer Profile:** Oregon winery manages all services from grape to shelf.

**Business Challenges:** Wants to expand offerings to include tent sales, while integrating with their existing winery software, Blend. Solution must handle complete lifecycle of wine, including growing, manufacture, distribution, and sale while offering excellent CRM.

**Solution:** Install Microsoft RMS to manage all retail aspects of the winery. Build a custom application to port information from Blend into RMS. Install Mobile POS, Mobile Suite, and Elypsis Wine Club Manager, to add versatility to retail sale operations.

**Benefits:**

- Expanded avenues of retail sales
- Complete information tracking
- Complete digital documentation

## From Grape to Shelf

Wine is the secret ingredient that creates romance from a simple dinner, and brings sparkle to a lady's eyes. The sumptuous culmination of rich earth, sunshine, and fastidious care, its creation is often the lifetime work of generations of winemakers, making the balance of yesteryear's traditions with the digital efficiency of technology a daunting task.



### The Problem

Wineries offer unique challenges for POS solution integration. Grapes are grown on the premises, pressed and bottled into fine wine, then distributed and sold; all in the same location. Domaine Serene, a distinguished winery in the Dundee Hills of Oregon, needed a digital solution for its award winning wine that would cover all aspects of operation, from grape to shelf.

Allan Carter, Marketing Director of Domaine Serene, was interested in expanding the retail operations of the winery. In researching potential solutions he came across New West Technologies, a Portland based integrator of retail POS software solutions.

“Traditionally, all orders were processed manually. This made tracking sales and inventory very difficult. Taking orders by hand and fulfilling them from handwritten work orders was not fast, reliable, or effective,” reflects Carter, “I came from the high tech world before getting into the wine business so I was very aware of the challenges we faced in creating the perfect retail solution. New West Technologies had the right technology, the right attitude, and the right people for us. They made the process painless – no small feat for anyone designing a custom solution.”

### The Answer

New West Technologies evaluated the current winery software being used at Domaine Serene. Working within budget while still accomplishing the project goals, New West Technologies elected to maintain the existing winery software and to integrate it into Microsoft Retail Management System (RMS) by building a custom software extension. In addition to the software extension, mobile retail capabilities were added and overall functionality was enhanced. All told, a total of seven different core software applications were integrated to complete Domaine Serene's solution.



Mobile POS, a convenient mobility software title designed for handheld PDA's, allowed Domaine Serene to integrate tent sales into their retail offerings. With the ability to ring customer sales from outside the sales floor, the expanded capability of outdoor sales boosted sales significantly.

"The Domaine Serene experience is all about exceptional service. Being able to showcase our wines and take customer orders without leaving the table allows us to enhance the experience and increase sales on the spot."

Mobile Suite, containing a variety of software applications designed for the Pocket PC handheld platform, conferred the ability to take the computer to the inventory. Employees use the handheld PDA's to scan product barcode, wirelessly transmitting the information to the database. Records are immediately updated and can be counted in small or large sections.

Other software titles meant to improve overall flow and functionality were People Pop, a directory search tool that auto populates customer information based on phone number, and Mix & Match, a price discounting tool for wine sales, enabling customers to chose a variety of different types of wine and purchase them at the case rate.

### Integration

With such a wide variety of software to cover all aspects of work, integration was of key importance. "There is no silver bullet when it comes to software. Every customer is different and I'm sure we were quite a challenge. This was not an upgrade ... this was built from the ground-up. New West Technologies did an amazing job of customizing the right solution, working with our existing production software, and making sure all of our needs were met. Also, the post-install support has been exceptional."



With a bit of pre-install jitters and a great deal of excitement, Carter decided to install the entire system at once. New West Technologies senior technician, Eric Green, built the integration over the course of a week, allowing an extra month to ensure that there was time to test and smooth out any system bugs before taking the new system live.

“Each person at Domaine Serene had their own area of expertise. Due to the flexibility I have with RMS, it was just a question of matching up the program and training with the right person. The most difficult part was getting the correct people together at the same time to show them what we can do,” states Green confidently.

**Benefits**

With the completed solution in place, Domaine Serene has access to new sources of potential. Their newly integrated system has room for growth, while offering opportunities to fully explore new outlets of retail sales.

“The New West Technologies solution completely upgraded the way we do business. Now I can track every bottle sold, including samples, employee purchases, and even non-wine merchandise. It makes it very easy for us to know when we are running low on items and sales reports are accurate and effective.”



For more information about New West Technologies’ Mobile POS and Mobile Suite, go to: [www.newestech.com](http://www.newestech.com)

**Software:**

- Microsoft Windows System
- Solutions
  - Microsoft Retail Management System Store Operations
  - New West Technologies Mobile POS
  - New West Technologies Mobile Suite
  - New West Technologies People PoP
  - New West Technologies Mix & Match
  - Elypsis Wine Club Manager
  - Blend
  - ShipRush UPS
  - ShipRush FedEx

**Hardware**

- New West Technologies Workstations
- ELO Touch Screens
- Symbol MC-50 handheld PDA
- Zebra QL320 mobile wireless printer