

## B.C.-Based Winery Uncorks Peak Performance With Sage ERP Accpac

Quails' Gate Estate Winery, located in British Columbia's spectacular Okanagan Valley, has won numerous awards in recent wine competitions staged throughout Canada, California, and France. Yet, with sales growing rapidly and its business software systems lacking integration, Quails' Gate struggled to manage inventory, track sales, and produce information that conformed to British Columbia's strict reporting guidelines. Management called in highly regarded computer consulting firm BDO Dunwoody to integrate all its business systems into one central database for instant access to real-time information. BDO implemented Sage ERP Accpac and customized the solution to streamline all business processes. Armed with this immediate access to essential data, winery staff can now perform in-depth sales analysis, track inventory from raw materials to finished goods, and generate documents to governing agencies without any duplication of effort.

### Lack of Integration Leads to Widespread Inefficiencies

International acclaim in the wine industry usually equates to significant sales growth, and Quails' Gate is no exception with a sales increase of 500% over the last eight years. Unfortunately, the winery's wine information management system did not integrate with its accounting system, leading to lengthy manual and duplicate entry of information into the two separate systems. Journal entries, for example, were entered manually into the general ledger, invoices were generated twice, and sales and tax data for the Liquor Distribution Branch (LDB) were created using Microsoft Excel® spreadsheets because the winery's software couldn't adapt to the agency's strict reporting guidelines. The winemaker kept records in Excel and then transferred the data to the wine information management system before creating reports at month end. There was no way to track raw materials (such as bottles, labels and corks) through finished goods in one system.

"We needed one system and one database that could handle all of our accounting functions and allow us to customize our invoices to meet the requirements of the LDB," stated Tony Stewart, co-proprietor and CFO of Quails' Gate. "We also wanted the ability to perform in-depth sales analysis so we could make the most informed management decisions for the winery. Integration to our accounting system from our POS system that we use in our retail store was another high priority. Obviously, with systems that didn't talk to one another, all of this was virtually impossible."

### Customer

Quails' Gate Estate Winery

### Industry

Beverage

### Location

Okanagan Valley, British Columbia

### System

Sage ERP Accpac 500



### Challenge

Quails' Gate's business software systems lacked integration, causing inefficiencies in data entry, report generation, inventory management, and sales tracking.

### Solution

A multiphase implementation of the Sage ERP Accpac accounting solution was augmented by customizations to Quails' Gate's invoices and management reports.

### Results

Sage ERP Accpac helped streamline all of Quails' Gate's business operations, yielding tremendous time- and cost-savings, plus enterprisewide access to real-time information.

### Sage ERP Accpac Helps Quails' Gate Achieve Peak Performance

Stewart contacted senior consultant Elaine Marshall of computer consulting firm BDO Dunwoody, who recommended Sage ERP Accpac. BDO performed a multiphase implementation of the Sage ERP Accpac solution, starting with the creation of complex item numbers in the inventory system that yielded key information about every bottle, including the type of grape, vintage, and bottle size—essential data for the LDB and sales analysis. BDO then customized the winery's invoices to meet LDB specifications and created internal sales and inventory reports for management. The benefits of the new system emerged quickly.

"With Sage ERP Accpac, we have saved a great deal of time in many phases of our business operations," said Stewart. "We now have complete integration between our order desk, accounting, and inventory."

At a recent meeting of the BC Wine Institute, Stewart proclaimed, "Sage ERP Accpac performs like a Ferrari. We've got an incredible program that will grow with us for the long haul. Our faith in the program is demonstrated by our recent decision to expand the functionality of the system with add-on products from Sage Development Partners. It is comforting to know that the product and BDO Dunwoody will be there to support us well into the future."

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—Tony Stewart,  
Co-Proprietor and CFO  
Quails' Gate Estate Winery

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## About Sage North America

Sage North America is part of The Sage Group plc, a leading global supplier of business management software and services. Sage North America employs 4,000 people and supports 3.2 million small and mid-sized business customers. The Sage Group plc, formed in 1981, was floated on the London Stock Exchange in 1989 and now employs 13,400 people and supports 6.3 million customers worldwide. For more information, please visit the website at [www.SageNorthAmerica.com](http://www.SageNorthAmerica.com).

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