

## Results of Iowa Winery Software Survey

Date: 4-15-08

On April 1<sup>st</sup> I e-mailed the following four simple survey questions regarding winery management and sales software programs that are currently being used by Iowa wineries. April 8<sup>th</sup> was the deadline for replying to this survey.

### Survey Questions E-mailed on 4-1-08 with reply date of 4-8-08:

1. Are you using any special Winery Management/Sales Software programs?  
Yes \_\_\_\_\_ No \_\_\_\_\_
2. Name of the Program(s)?
3. Do you like it? Yes \_\_\_\_\_ No \_\_\_\_\_
4. Why?

I promised to get a summary of the results of the results of this survey ASAP. I was pleasantly pleased to see that 32 of our 56 current operating wineries responded to the survey. These 32 wineries would probably represent 85%+ of the total native wine sales and production in the state. This document will be posted under the *Resources – Marketing* link on the Midwest Grape & Wine Industry Institute homepage: <http://www.extension.iastate.edu/Wine/Resources>

### The following wineries responded to this Survey:

Black Lab Crossing – Davenport, IA	Rosey Acres Winery – Runnels, IA
Bluestem Winery – Parkersburg, IA	Santa Maria Vineyard & Winery – Carroll, IA
Breezy Hills Winery – Minden, IA	Spotted Horse Vineyards – Arcadia, IA
Cedar Ridge Winery & Vineyards – Cedar Rapids, IA	Snus Hill Winery – Madrid, IA
Eagles Landing Winery – Marquette, IA	Stone Cliff Winery – Dubuque, IA
Engelbrecht Family Winery	Sugar Clay Winery & Vineyard - Thurman, IA
Faeth Farmstead Cider Mill & Winery - Ft. Madison, IA	Summerset Winery - Indianola, IA
Fireside Winery – Marengo, IA	Tabor Home Vineyards & Winery – Baldwin, IA
Grape Escape Winery – Pleasantville, IA	Tassel Ridge Winery – Leighton, IA
Heartland Harvest Winery – Fr. Madison, IA	Two Saints Winery – St. Charles, IA
John Ernest Vineyard & Winery - Tama, IA	Wallace Winery - West Brach, IA
Kings Crossing Vineyard & Winery – Glenwood, IA	Wide River Winery – Clinton, IA
Lindon Wines – Burlington, IA	Whispering Pines Winery - Keosauqua, IA
Loess Hills Winery – Crescent, IA	White Barn Vineyard & Winery – Albia, IA
Madison County Winery – St. Charles, IA	White Oak Vineyards – Cambridge, IA
Prairie Moon Winery - Ames, IA	Winneshiek Wildberry Winery – Decorah, IA

### Summary of Survey:

1. 26 wineries are not using any special form of winery management software.
2. 8 wineries identified Microsoft Excel software being used.
3. 8 wineries identified Quick Books or Quick Books Pro as their primary accounting and sales software being used.
4. These are the special software packages that were identified:

AgVision Accounting & Sales: <http://www.dmi-agvision.com/AgVision%20Software.html>  
Amphora Wine Log: <http://www.fermsoft.com/amphora/>  
Cash Register Express from WineWare: <http://www.winewaresoftware.com/>  
Nexternal: <http://www.nexternal.com/>  
Orion Blend (prior name – eSkye): <http://www.eskyesoftware.com/>  
POSX: <http://www.pos-x.com/>  
ShipCompliant: <http://shipcompliant.com/>  
VinNow: <http://www.vinnow.com/>

5. Several were looking into or had just purchased:

Elypsis: <http://www.elypsis.com/>  
VinNOW: <http://www.vinnow.com/>

**Actual Replies to Survey:** (names have been deleted for confidentiality)

1. No winery management software being used. Just, accounting and point of sale software.
2. We do not use any winery mgt. computer software programs.
3. No special software program being used.
4. No special software, just using Excel.
5. We are using a Point of Sale package that also has wine club management features.

The package is published by WineWare from Paso Robles, CA and the POS portion is called Cash Register Express (CRE). We DONT like this package and are actively looking for an alternative. The advantages of the WineWare product are low cost and the suppliers ability to configure both the hardware and software for the winery. But, the Access version is not stable. DONT specify that version! And, the SQL version is just hokey to use. It doesn't directly interface with UPS or with Ship Compliant.

We need a POS package that captures transaction data for financial reporting purposes but that already has hooks or links built in for direct connection to UPS for shipping, Nexternal for direct web orders, and Ship Compliant for regulatory compliance related to interstate shipping. We are looking at Elypsis and Vin Now currently but have not made any final decisions.

Yes, we are using a data entry software called Orion Blend (prior name-eSkye) in the cellar. Yes we like it we mainly use it for data entry and cellar inventory, such as glass, capsules, etc. It is a place that a hard copy can be kept and referred to it is not a mandatory item to have as our winery recently experienced a TTB inspection and the paper trail (clipboard) is suffice for the inspectors data collection.

6. We do not use software specifically for a winery, but we do use QuickBooks Point-of-Sale for our Sales and Inventory Management of Tasting Room items. We are very happy with it because we can track the inventory and sales and create just about any kind of report that we might want to know about vendors, customers, items for sale, receiving, purchase orders, reorder points, sales, etc. Of course, the reports are only as good as the information that you put into the program...for instance, we only use the Customer info to manage our Case Club Members, rather than the entire customer base. It also feeds all the sales directly into the accounts that we have set up in QuickBooks Pro, so there is no double-entry of that data, which makes it easier around tax time as well! We simply manage our Vineyard /winemaking/bottling supplies through home-made spreadsheets.

7. We are in the process of installing two new software packages. One for the winery and one

for the tasting room and retail sales. The winery software is produced by the Orion company and known as Blending Management. The tasting room software is VinNOW. I have reviewed them reasonably well and think they are very good; however, they are pretty expensive (i.e. \$15000 and \$6,000 respectively (prices include license, installation and 1yr maintenance). I was originally introduced to them by another Iowa winery. They had already used other software solutions, but threw them out because they did not address their needs.

8. We do not have winery management software. We use Excel spreadsheets for just about everything in the winery. We also use Quick Books Premier for accounting. It works well as an accounting program, but I tried using it for detailed inventory and decided it was too labor intensive. I just use Excel for that now.

9. No.

10. We didn't know there were any winery management computer software programs out there. After you tally them could you let us know and where you might be able to get them.

11. We are not using any special winery management programs at the current time. We do have a few glorified excel spreadsheets to assist us in inventory, sales, receipts, and sales and alcohol tax payment schedules.

12. Here are answers.

We use winery management/production/inventory and sales programs that I and the staff have developed.

We constantly change the programmed spreadsheets.

It is custom developed

13. We don't use any special software. We use Quickbooks for our accounting. (there, now I should qualify to see the results, huh?)

I'm an accountant by background/training, and I really struggle with the accounting for a winery. The biggest issue is always related to inventory valuation. Two sub-issues here.....

a. Our winery owns vineyards - all season long we expense off our grape development costs (pruning, chemicals, etc.), then when the grapes come in we have a big inventory number to add to our books and it really distorts things.

b. Accumulating inventory costs as you process the wine is also very challenging. First you have the cost of the grapes (which is already complicated if they are your own grapes as noted in 1. above), but then does the wine increase in value as it gets fermented, barrel aged, fined/filtered, and eventually bottled.

For years, I have felt like this would be a great topic for our next annual conference. If you happen to know of other accountants among our ranks, maybe we could get together and provide some guidance to our membership.

14. We are using Point of Sale software that works with Quickbooks. The software works well for retail, wholesale, and inventory control.

15. No I do not use a computer program. We are so small that I wouldn't find it useful.

16. We are not using a sales program at this time and would certainly appreciate your

recommendation on a good one. We do use Excel to keep track of sales for tax purposes

17. Yes, we are using a program called "posx" and we like it.
18. Yes we are using a software package designed for wineries by DMI AgVision in Ankeny. We are helping them develop the program. Tech support is great...program is working great now. It is designed for POS plus manufacturing of product...takes each ingredient & puts it into actual cost. Be glad to demo it for anyone interested.
19. We are using Quickbooks and like using it.
20. We are not using special winery software. Quick books does us well. We did integrate Point of Sale into our system for tasting room sales. Works great!
21. We use Quickbooks Pro and like it because it can be customized to fit.
22. No.
23. No.
24. No.
25. No.
26. No 2 pencil. Handy. Have sharpener, black circular pointer and lifetime wooden supply of choice colors. Preference for purple.
27. It's hard for me to fill out your survey because we currently use a cash register from Sams' (would NOT recommend!) but we are getting the same software that XXXX has and from what I've seen and discussed with VinNow, it looks exceptional. The only problem is the price. Very expensive. All together, I'm hoping it'll be around \$8,000, but because we had to buy a new computer, probably more. I'll do the installation with VinNow on April 18th and hopefully, up and running right after that. If I fill out your survey with what we currently use, it won't be the same as what I will fill out in a couple of weeks.  
  
Actually, I wished your survey had been done earlier in case we didn't get the best software. My luck.
28. No.
29. No.
30. No special software. I use a combination of Microsoft Excel spreadsheets and a I also use Quickbooks for my financial records and inventory control.
31. Yes, Amphora Wine Log, It is okay. It was cheap.\$100 I thought it was simple to us
32. No.

## **Additional Resources**

### **Primarily Winery Software Packages:**

Amphora Wine Log: <http://www.fermsoft.com/amphora/>  
AMS Winery Mgt. Software: <http://www.amssoftware.citymax.com/home.html>  
Cellar Wine Software: <http://www.cellarwinesoftware.com/>  
Cypress Solutions: <http://www.winerypos.com/>  
Elypsis: <http://www.elypsis.com/>  
Ewinery Software: <http://www.ewinerysoftware.com/>  
Ewinerysolutions: <http://www.ewinerysolutions.com/>  
Mac Wine Software: <http://www.wine-software.net/winext.shtml>  
Orion Wine Software: <http://www.eskyesoftware.com/>  
Nexternal: <http://www.nexternal.com/>  
POS Resources: <http://www.posr.com/ProductWineryRMS>  
Shipcompliant: <http://shipcompliant.com/>  
Vines Online Solutions: <http://www.vinesos.com/>  
VinoTrac: <http://www.vinotrack.com/>  
Vinsight: <http://www.vinsight.net.nz/>  
Vintage Consulting Group: <http://vintage-consulting.com/>  
Vinteractive: <http://www.vinteractive.com/>  
Vintners Advantage: <http://www.miscorp.com/v.htm>  
VinNOW: <http://www.vinnow.com/>  
WineMakers Database: <http://www.wmdb.com/>  
Wine Management Systems: <http://www.winemanagementsystems.com/>  
Wineware Software: <http://www.winewaresoftware.com/>

### **Primarily Vineyard Software Packages:**

AgCode: <http://www.agcode.com/>  
GrowSmarter.com: <http://www.grow-smarter.com/>  
Orange Enterprises: <http://www.orangesoftware.com/>  
Premier Viticulture: <http://www.premierevit.com/>  
Scancontrol: <http://www.scancontrol.com/>  
Sureharvest: <http://www.sureharvest.com/>  
TracGrape, Cornell Univ: [http://www.nysipm.cornell.edu/trac/about/about\\_grape.asp](http://www.nysipm.cornell.edu/trac/about/about_grape.asp)

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