



**Have you outgrown
your accounting
software?**



For most winery business owners, their first accounting software package was a big improvement over paper files and manual checks. But as their businesses grow, many owners find that those same easy-to-use features actually begin to impede the progress of their business. At the same time, others find their all-in-one systems built on old technology have become an albatross that consumes precious business resources. They find themselves spending time moving data in and out of the system or inventing workarounds for ineffective processes. Rather than adding efficiencies, their system has begun to stifle progress and hamper clear insights, leading to employee, customer, and supplier frustration. Before you know it, those early efficiency gains have become productivity roadblocks.

Don't wait until you slam headfirst into one of those business roadblocks; there are plenty of signs that you have outgrown your system along the way. We've compiled a list of the top reasons that many wineries decide to move to a system that better supports the needs of their growing business. Be on the lookout for these signs that it is time to find a new route to success.



#1

Mounds of paper

You have enough to do during harvest without having to search for documents. From grape contracts and weigh tags to invoices purchase orders and payments, the flow of information can be clunky at best. And which person in the process has possession of the document when it is time for approval?

Are you experiencing any of these problems?

- Contracts are stored in a drawer.
- Payments are only recorded when they become due.
- Weigh tags float around for weeks.
- Approval of weigh tags is a hit-or-miss proposition with manual tracking.
- Invoices arrive months after the close of the fiscal year, and grape costs end up in the wrong period (making your costs of goods sold inaccurate).



TeraVina helps you dig out

Imagine a system that originates with the grape purchase contract. Contract details including payment terms are recorded in the system for each vendor. Weigh tags are matched against the contract and then automatically converted to purchase orders. Final approval of the weigh tag (which happens electronically) causes the purchase order to appear in a payment queue that is sitting on the account payable clerk's desktop for quick invoicing. All of the transactions flow from preparer to designated reviewer with ease thanks to configurable automated work flows. All notes and scanned documents stay connected to the accounting transaction as it moves through to the financial statements.

You can stop imagining. There is a solution.



#2

Production scheduling problems

Sales and production both have a plan. Unfortunately, they each treat their plan like a closely guarded secret and keep it to themselves. Neither party knows what the other has in mind. The result is product shortages, poor customer service, and frustration across multiple departments.

TeraVina gets things moving again

With TeraVina's automated production scheduling, winemakers have a clear view of planning supply years in advance. In one screen, they can view the bulk wine and grape supply to plan for bottling. With this insight, they can then communicate better with both marketing and accounting while also connecting the production plan with the sales plan.



#3

Yearend nightmares

Do you dread yearend? Are you locked in a room for two weeks just trying to calculate the cost of wine? And then there is month end, which unfortunately happens every single month. Without accurate cost of goods sold, you don't know if you made a profit or not. So you wait until year end and hope and pray that you charged enough to cover the costs of producing that bottle of wine.

TeraVina lets you sleep easy

Stay on top of your wine costs as they happen. Automatically allocate monthly overhead including depreciation to your entire bulk wine inventory while adding in the true cost of grapes and additives in real time.



#4

Fulfillment challenges

Once you sell the wine, you have to get it from one warehouse to another and out to your customers. It's time to fire up the fax machine, send out an email, and set up yet another tracking system. When it comes time for a physical count, there are countless hours spent following the paper trails and eventually making adjustments for erroneous balances.

TeraVina tracks the flow of goods all the way through your system

By applying EDI technology and third-party warehouse communication tools, you can track inventory from orders to your third party warehouse or distributor automatically. You will have full visibility of your order as it moves from the warehouse to your customer while only having to touch the transaction once.



#5

Which numbers are the *real* numbers?

If every person in your organization has their own spreadsheet to manage their team, department, or even individual results, you have a problem. Which spreadsheet is the right one? The more information stored in disconnected systems, the greater the odds that you are relying on inaccurate numbers. We're not saying you have to stop using Microsoft Excel; we're just saying there is a better way to use it.

With TeraVina you have one source of the truth

You can use the power of Excel to get the insights you need while maintaining your connection to your Microsoft Dynamics NAV accounting database. That way, you can use familiar tools to create customized reports that get refreshed as your data changes. Goodbye islands of data. Hello business insights.



#6

Frustrated teams

How much time is your team spending manipulating data? They probably have other jobs that would add far greater value to the organization. It's time to turn the low value work over to the automated systems and free your talented staff to spend more time on high value customer relationships - those experience-building tasks that make your winery special.

Use TeraVina roles to streamline team effort

By applying EDI technology and third-party warehouse
When a user logs in to their TeraVina screen, they see only the applications or tasks that are relevant to the work they do. They have streamlined access to information their way and can get straight to the task at hand without detours.



#7

Integration headaches

Where does your customer data live? Is it all in one centralized database, or do you have to check three different systems (POS, E-Commerce, and CRM) just to determine the correct address, lifetime order value, and last shipment for your top customer? Add in multiple locations and remote users, and you have an even bigger mess.

TeraVina puts the customer at the center of your business

With integrated applications and synchronized data, you only need one view of the customer. That means sales and payment details are consolidated and addresses are updated across all of your systems and all of your locations.



#8

Clogged cash flow

Cash flow is the lifeblood of any business, especially a winery. It's a cash-intensive business. You need to know when to expect incoming cash from your distributors and restaurants and when to make payments to your suppliers and vendors. You need to plan your sales promotions, wine club sales and grape purchases to optimize your business cash flow. That's why you need information from every area of your business at your fingertips. And you need it now.

TeraVina helps you plan ahead

With TeraVina, you can consider all aspects of your business and their impact on cash flow. You can create cash forecasts and projections that account for future grape purchases, including open orders and other anticipated outflows. By building reusable models in TeraVina, you can make sure information is consistent, accurate, and available when you need it.



#9

It takes an army

Excessive overhead in the form of people can be a drain on your business profitability. How many people does it take to manage all those external processes in your business? From custom documents to special reporting requirements to one-off projects, there never seem to be enough people to get it all done. And who has time to revise those arcane processes that have been built around the software?

With TeraVina, you can put your people where they belong

With the right software, you can invest the time up front to build a system that supports your business processes. Your people make decisions once, not every time they have to enter a transaction. They can design and use templates to reduce the steps needed to add customers, vendors, or new items.. Decisions are automated where possible and built around rules that are unique to your business.



#10

Clogged pipelines

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Late close

At the end of the month, you want to know where you stand. Now. You don't want to spend hours of your time pulling numbers out of different systems, reconciling and adjusting, and chasing down discrepancies. You just want all of your information in one place—in balance and accurate.

TeraVina takes the pain out of month end

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#12

Poor internal controls

Everyone in your organization needs to wear a lot of hats. That doesn't mean, however, that you need to have lax standards and poor controls that can leave you exposed to fraud. You need a system that tracks documents through your system, keeps track of reviewers and approvers, and provides traceability and security.

TeraVina puts you in control

With full traceability of transactions, automated approval processes, account controls, and role-based access, you can be sure your information and your assets are in the hands of those who have proper authorization.



#13

Out of stock

Talk about a customer service nightmare. You sell your customer that perfect bottle of wine for their 30th anniversary only to discover it is out of stock. You can't tell your allocated wine from available wine and can't separate the heat holds from the items available for sale. Your inventory report is 40 pages long to support the world's longest list of inventory items, which you created so you can keep track of the wine in different locations.

Centralized inventory tracking

Thanks to multi-location tracking and full warehouse integration, TeraVina gives you one source of your inventory on hand. You'll be able to move inventory between your warehouse and your tasting room and have the confidence you need to fulfill customer orders accurately and on time. You will also have more accurate inventory balances at the end of each month and



Get moving.

The question is not whether you can afford to upgrade your systems, but how can you afford not to? How much time and money are you spending to work around your disconnected systems or digging for the information you need to make good decisions? One bad decision can cost you more than a switch to the right automated solution. And think of the value of all those good decisions and keen insights that await you. How much better might your business be?

TeraVina is built on Microsoft Dynamics and supported by a team of experts who understand not just technology, but the processes that keep businesses running. They can work with you to implement the right solution which is more affordable and easier to implement than ever before. You can deploy your solution on the Microsoft Cloud, a private cloud, or your own servers.

