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LS RETAIL IN MICROSOFT DYNAMICS NAV

COUNTRY: PORTUGAL

SECTOR: *Production, vinification and bottling of wines, provision of related services, operation of farms and wineries and operation of catering establishments.*

CLIENT PROFILE: *Symington Family Estates is the leading producer of speciality Port wines, owning the Graham's, Dow's, Warre's, Smith Woodhouse, Quinta do Vesuvio, Martinez, Gould Campbell and Quarles Harris brands. The consolidated sales of the family's Port companies total more than a third of the speciality Ports sold worldwide.*

BUSINESS SITUATION: *Strengthening the day-to-day operational management of Symington's shops, mainly in terms of effective stock management and the management of booking and scheduling visits to the cellars, integrated with the organisation's existing global management system.*

Partner

Arquiconsult's initial expectations were fully realised throughout the project, complemented by the smooth integration of the entire project team, creating synergies and a strong motivation for success. The Arquiconsult-Symington partnership did not end with the success of the initial project; on the contrary, now that the initial objectives have been achieved, new ones are on the horizon, contributing even more to the growth and success of the Caves Symington shops.

MAIN BENEFITS

Single, integrated solution from the printing of visits to the Point of Sale Merchandising. Fully integrated solution with the existing back-office management system Stock management in warehouses and shops by physical location fully integrated into the operation Booking and scheduling of individual and group visits to the cellars Commission and commission agent management Centralised management of prices and commercial conditions for the different shops.

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With the new LS Retail system we have clearly increased the operational efficiency of the shops, freeing up staff to provide better customer service and having information available at the moment to make better decisions.

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Manuela Caldeira, Head of IT Department

Founded in 1882 by Andrew James Symington, Symington Family Estates is a producer of Port, Madeira and Douro DOC wines and is the leading producer of speciality Ports, holding the Graham's, Dow's, Warre's, Smith Woodhouse, Quinta do Vesuvio, Martinez, Gould Campbell and Quarles Harris brands. The consolidated sales of the family's Port companies total more than a third of the speciality Ports sold worldwide.

Over the years, the family's more than two dozen estates have produced wines whose quality has been recognised in the most demanding international competitions, culminating in Dow's 2011 Vintage Port, which was awarded first place in the 2014 ranking of the 100 best wines in the world by the prestigious US magazine Wine Spectator. To further enhance this performance, another wine from the Symington universe came 3rd in the list, Chryseia 2011 Prats & Symington (P+S).

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Among the various existing proposals, we felt that Arquiconsult, with LS Retail, represented a unique combination of knowledge of the needs of the retail sector and the functional richness of the solution.

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Manuela Caldeira, Head of IT Department

SITUATION

With the increase in the number of Symington Cellars shops, accompanied by a growing increase in sales volume, the level of integration between the shop systems and the back-office management system became critical, improving operational efficiency and managing the shops from a global and centralised perspective. The main obstacles were as follows:

- Non-uniform product master data, both between shops and with central systems;
- Difficulty controlling stock between shops and lack of global vision;
- Lack of overview of appointments and scheduling of visits;
- Low level of integration with the central systems and executed over weekly periods considered too long.

It therefore became imperative to replace the shop management system, which lacked the capacity to evolve, and a selection process was launched. The decision fell on LS Retail, a specific retail solution in Microsoft Dynamics NAV, and Arquiconsult:

From among the various existing proposals, we felt that Arquiconsult, with LS Retail, represented a unique combination of knowledge of the retail sector's needs and the solution's functional richness.

Manuela Caldeira, Head of IT Department. //

SOLUTION

Implementation of LS Retail, in Microsoft Dynamics NAV in 3 shops with 10 POS with partner Arquiconsult, in the main areas described below.

Integration with back-office management systems

Procedural and intelligent integration of data, according to the defined periodicity or instantaneously for the defined critical processes, between the shops and the central management systems. Master data, its tables and attributes are synchronised and integrated, as are all relevant movements, both operational and fiscal.

Sales operations and shop management

The integration with the central systems and the ability of LS Retail to centrally manage and anticipate the updates that the system undergoes, particularly in terms of stock movements and sales and promotional conditions, has provided Symington with additional commercial arguments and guaranteed the homogeneity of these conditions in the different shops. All of this has been done in a simple way and without the intervention of the staff.

From opening the till to closing it at the end of the day, the ease and security of operations has been proven. Simple but potentially error-generating processes, such as integrated MB payments between LS Retail and SIBS, product movement using barcodes with the possibility of validation in the event of label changes, various levels of discount control at the time of sale, stocks with warehouse location management, an instant view of the shop's stock and that of the other shops, are just a few examples of the features that have contributed to the project's success in users' day-to-day lives.

In addition to the whole process of scheduling and booking visits managed in the back office, LS Retail now makes it possible to view the plan for scheduling visits to the cellars at the shop's POS and to manage the whole visit, from the quick registration of an unscheduled visit, the management of Club members, the printing of labels for tastings to the sale of Symington wines and merchandising. According to Manuela Caldeira:

With the new LS Retail system, we have clearly increased the operational efficiency of the shops, freeing up staff for better customer service and we now have information available and at the moment to make better decisions. //

Visit Booking Management

Centralised scheduling management of individual and group visits to the cellars with visual accelerators by type of visit and by status (pre-booked, booked, visiting, cancelled, no-show). A simplified and quick record of visits at POS has also been created.

Members Club Management

Management of the Symington Members Club card, in terms of visits and purchases, enabling greater knowledge of customers and their consumption habits and visits, creating the basis for dealing with customers in an Omni Channel vision.

Commission Management

Management of the entire process of assigning commissions by product and by shop, commissioning rules and their calculation.

Management Reporting

The LS Retail solution implemented enables accurate monitoring of shop activity, from detail to a consolidated view of all the shops. Information on sales, stocks by location, visits and commission allow for a better understanding of the performance of the activity and provide fundamental information for decision-making.

Summary of Benefits

With the final solution in place, the objectives of integration with the back-office system, stock control by location and centralised price management, automation of the main processes, such as booking, scheduling and receiving groups, and commission management, are now realities applied in a simple and effective way in each shop.

ABOUT ARQUICONSULT

Arquiconsult is an information systems consulting company, based on Microsoft Dynamics technologies, with offices in Barcelona, Bilbao, Lisbon, Luanda, Madrid, Oporto, Riyadh, Salamanca, Seville and Vila Real.

Composed by the largest and most experienced team of consultants, having already implemented some of the most complex Microsoft Dynamics Business Solutions and being frequently referred to international clients for their implementations in our country.

Arquiconsult is constantly innovating its offer and has several verticals available, for several activity sectors, which add value to Microsoft Dynamics 365. Microsoft Dynamics AX is a clear example that allows us to make available to Portuguese and international companies the best and most complete integrated Management solution.

Some reference clients in the various sectors of activity:

- Polopique
- Dunlop Protective Footwear
- Teka Portugal
- Klaveness
- Farfetch
- Stericycle
- SAPA
- Gunnebo
- Tecnocabel

LOCATIONS

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