



**Microsoft Customer Solution**

**Case study**

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**Damien Lister**

*Financial Controller  
Cockatoo Ridge Wines*



**COCKATOO**  
*Wines* **RIDGE Ltd**

## **Cockatoo Ridge Wines Cuts Reporting Time by 90% to Prepare for Major Export Push**

Cockatoo Ridge Wines is a business on the move. Following strong sales to the United States in 2002 and 2003, the company recently started exporting wine to Britain. It will also begin sales to Europe later this year. With plans to increase its export business 25-fold in the next 12 months, Cockatoo Ridge needed a faster, more streamlined, and more reliable financial management tool. It chose Agrivision Wine®, an integrated package based on Microsoft® Business Solutions–Navision® and provided by Microsoft Gold Certified Partner Focal Systems. Not only is Agrivision Wine® tailored to meet the specific needs of the wine industry, but it can also be customized for individual companies. Since the system was implemented at Cockatoo Ridge, the time needed to generate month-end reports has been slashed from 12 days to two, and the time taken to generate a ‘budget versus actual costs’ report has been cut from half a day to two minutes.

CUSTOMER PROFILE	BUSINESS SITUATION	SOLUTION	BENEFITS
<p>A relatively new arrival on the Australian wine scene, Cockatoo Ridge Wines is fast becoming one of the most recognizable labels in Australia. Situated in the Barossa Valley, Australia’s premier wine region, Cockatoo Ridge’s half-yearly revenues rose 42% to A\$9.3 million, with net profit up 28% to A\$1.98 million. Exports account for about 25% of the company’s turnover.</p>	<p>Cockatoo Ridge is unique in that it sources fruit from its own vineyards and from other growers, before producing its wines off-site. Its current financial management system did not provide accurate and up-to-date information at all times and did not meet the needs of the company. Cockatoo Ridge needed more speed, accuracy, and simplicity in its financial reporting.</p>	<p>Microsoft® Gold Certified Partner Focal Systems distributes Agrivision Wine®, an application based on Microsoft Business Solutions–Navision®. Combined with JET Reports®, it meets the information requirements of the wine industry. Agrivision Wine® comes with its own database that retrieves information quickly and performs numerous calculations on complex data.</p>	<ul style="list-style-type: none"> <li>▪ Reporting time cut by 90%.</li> <li>▪ Ability to tailor a solution that is industry-specific.</li> <li>▪ Easy-to-use tools integrated with the Microsoft Office suite.</li> <li>▪ Flexibility to create individual reports for specific areas within the company.</li> <li>▪ Eliminates the need for replicating data necessary to produce reports.</li> </ul>

“The real-time reporting features allow us to have up-to-date information when and where it counts”

**Damien Lister**  
Financial Controller  
Cockatoo Ridge Wines

## Situation

Cockatoo Ridge Wines has grown to be one of the most recognized wine labels in Australia. Listed on the Australia Stock Exchange in February 2002, the company continues to expand distribution of its wines in Australia, as well as increase sales and distribution to international markets. It has just started to export to Britain after a strong year in the US.

Situated in the heart of the Barossa Valley in Australia’s largest wine producing region, Cockatoo Ridge Wines includes white and red table wines made from a single variety of grape, as well as white and red sparkling wines. Using the latest viticultural practices, their products are designed as modern, low-cost wines.

Cockatoo Ridge Wines currently exports 2,000 cases per year. Two of its business objectives are to increase its exports from 25% of distributions to over 50% within the next 12 months and occupy a larger proportion of the domestic market. However, the company realized its current reporting software would not allow it to reach these goals.

As a condition of being a publicly listed company, Cockatoo Ridge must provide complete financial and data analysis reports to all shareholders on a monthly, quarterly, and annual basis.

Such reports meant that fields within the company’s database needed to be populated by hand from a number of different sources. The process of manually entering data each month was time-consuming and prone to errors. As a result, the reports were often delayed by up to two weeks.

Cockatoo Ridge needed a solution that provided specific software functionality relevant to the wine industry that could also be tailored to its needs. In particular, Cockatoo Ridge wanted a package that would handle sales and distribution at the

same time it allowed the company to report on any area within its operations, using a simple interface.

Damien Lister, Financial Controller for Cockatoo Ridge Wines, says the main challenge was the amount of time it took to analyze and report on the business.

“We were always on the back foot because our knowledge of our position was limited,” he says.

“It also created a processing backlog because the system needed to stop collecting data until month-end reporting was complete. Once this month-end reporting was finalized, all the data for the current month then needed to be manually re-entered once the system was back online.”

Cockatoo Ridge wanted a faster system that allowed all reporting to be done while the next month’s data was being collected. To achieve its goal of taking a lead position in the wine industry, the company needed to employ a market-specific solution.

“The collection of data needed to address our financial and sales areas, including our budget forecasting, as well as our cellar-door and point of sales process management,” says Lister.

## Solution

Cockatoo Ridge implemented Agrivision Wine®, an integrated business solution built using Microsoft® Business Solutions–Navision®, that can be tailored to meet the specific needs of clients.

Agrivision Wine® gives Cockatoo Ridge an instant overview of its position, including general ledger and cash management reporting, and the ability to trace the manufacturing and distribution of stock. It will also provide Cockatoo Ridge

with Customer Relationship Management and e-business functionality.

Microsoft Navision® utilizes the open architecture that allows Microsoft Certified Business Partners, such as Focal Systems, to tailor the software to suit the needs of Cockatoo Ridge.

Focal Systems provided Cockatoo Ridge with Agrivision Wine®—a Microsoft-certified add-on that exploits the framework of Microsoft Navision® and is designed to address the information requirements of the progressive wine industry. The strategic partnership of Agrivision Wine® and Microsoft Business Solutions-Navision® is enabling Cockatoo Ridge to realise its business objectives now and into the future.

Bill Jarman, Director for Focal Systems, explains: “Cockatoo Ridge needed a number of specific functions to accommodate sales and distribution within the company. These functions included units of measurement and WET calculations. Agrivision Wine® provides a dimensional analysis of information and data which provides an easy way to slice and dice information.”

Based on a Microsoft SQL Server™ background, Microsoft Navision® comes with its own proprietary database which ensures that all staff can work safely and securely at all times. The database retrieves information quickly and performs numerous calculations on complex data. For example, Cockatoo Ridge is now able to calculate the Wine Equalization Tax (WET) payable on all wine distributed domestically and abroad, directly from the data already entered into Agrivision Wine®.

Previously, Cockatoo Ridge needed to calculate WET separately from the data already entered into its system. Agrivision Wine® eliminates the need to re-enter data, as the information is readily available at all times.

The developmental environment of Microsoft Navision® also allows Cockatoo Ridge to customise the software so that it integrates into its existing system. Using this framework, Cockatoo Ridge now uses a single package that works seamlessly with the Microsoft Office suite, so that all staff within the company can make use of this new system in a familiar working environment.

## Benefits

Cockatoo Ridge now has a thorough understanding of the core functionality of its business via a solution that is straightforward and easy to maintain. It is also cost-effective, flexible, and easy to use.

### Unlimited Reporting

The flexible reporting tools based on unlimited criteria means Cockatoo Ridge is now able to create and analyze reports on any fields within the database.

The easy-to-use interface that integrates with the Microsoft Office suite reduces the time needed to produce reports as data is always readily available.

Using the unlimited reporting criteria, Cockatoo Ridge now analyzes and reports on any aspect of the business by extracting data directly into Microsoft Excel using a tightly integrated package. Staff across the company can adjust the data in the Microsoft Excel worksheet. This modified data is then imported straight back into Agrivision Wine®

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Lister explains: “An example of the benefits of the reporting tools now

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**Damien Lister**  
Financial Controller  
Cockatoo Ridge Wines

available is our ‘budgeting verses Actual Costs’ report. Prior to Agrivision Wine® being implemented, this report could take up to half a day to produce because all the data had to be re-entered manually from our old system into Microsoft Excel. Now, with Microsoft Navision®, I can produce the report in two minutes. The time we are save using the reporting tools now available to us means we can spend more time on other areas within the business.”

By decreasing the amount of time spent on producing reports by more than 90%, Cockatoo Ridge can now spend more time concentrating on their business objectives.

### Collaboration

It is easy to modify Microsoft Navision® to suit the individual needs of companies such as Cockatoo Ridge. Certified Business Partners can tailor the system for clients using third-party add-on products. Using Jet Reports® Navision® Link, Cockatoo Ridge can build reports based on any field within the Agrivision Wine® database by extracting only the information required.

### Monthly Reports

Another benefit of integrating Microsoft Navision with Jet Reports® is the ‘drill-down’ feature. This is an easy to use filtering system that allows people to retrieve only the data they need in order to produce the individual reports directly from Agrivision Wine®. These fields include specific dates, sales figures, distribution lists, and purchase orders, to name a few. Microsoft Navision® provides easy tools so that the exact report is produced to suit the needs of the recipient.

“One of the benefits Agrivision Wine® has given us is reflected in our month-end reporting,” says Lister. “Previously, if I could produce this report in 12 days I would be happy. Now it takes two to three days. The real time reporting features allow us to have up-to-date information when and where it counts.”

### Exchanging Information

Cockatoo Ridge regularly exchanges information such as stock inventories, orders, and distribution lists with its six subsidiary companies, growers, wine producers, and distributors. The data validation process that occurs within Agrivision Wine® means accurate and comprehensive information can be sent and received at all times. This provides all parties with current and up-to-date information when it is needed most.

### Version Control

Microsoft Navision® has a built-in mechanism that prevents its database from locking other users out of the system. The system allows employees to access and modify the data simultaneously. This feature ensures that the data is always up-to-date and accurate.

### Point of Sale Management

Cockatoo Ridge has been able to streamline its point-of-sale process management for cellar-door sales. Prior to Agrivision Wine®, staff would manually record sales by writing the item sold on a separate piece of paper and use a cash register to calculate the total revenue for those items. Now they can electronically trace their stock items as well as manage the revenue generated from sales using a bar-coded scanning system. Agrivision Wine® provides up-to-date information on how much stock they have at the end of each day rather than waiting until the end of the month for all stock to be manually counted.

Agrivision Wine® will help Cockatoo Ridge continue its growth in the Australian market and expand its sales and distribution overseas.



## Software and Services

Microsoft Business Solution-Navision®  
Microsoft Windows Server™ 2003  
Microsoft Office 2003  
Microsoft SQL Server™  
Agrivision Wine®

### Hardware

Generic Dual Pentium® equivalent server  
Generic desktops  
Leader Laptop D630S  
Toshiba TE 2100 Laptop

### Partners

Focal Systems  
<http://www.focalsystems.com.au/>

JET Reports®  
<http://www.jetreports.com/>

## Software for the Agile Business

### For More Information

For more information about Microsoft products and services, call the Microsoft Sales Information Center at (800) 426-9400. In Canada, call the Microsoft Canada Information Centre at (877) 568-2495. Customers who are deaf or hard-of-hearing can reach Microsoft text telephone (TTY/TDD) services at (800) 892-5234 in the United States or (905) 568-9641 in Canada. Outside the 50 United States and Canada, please contact your local Microsoft subsidiary. To access information using the World Wide Web, go to:  
<http://www.microsoft.com/>

For more information about Cockatoo Ridge Wines, call (08) 8563-6400 or visit the Web site at: <http://www.cockatooridge.com.au/>

For more information about Focal Systems products and services, call (08) 9223 7900 or visit the Web site at:  
<http://www.focalsystems.com.au/>

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