

WINE INDUSTRY

TECHNOLOGY

SYMPOSIUM

ERP: Integrating the New Wave of Software

- **Corey Jellison**, general manager, operations, Huneus Vintners
- **Maryann Pellegrini**, controller, Trentadue Winery
- **Alan Atkinson**, director, business analytics, Constellation Brands

Huneus Vintners

- **Corey Jellison**, general manager, operations
- **6 brands**
 - Quintessa, Faust, Flowers, Benton-Lane, Leviathan, Illumination
- **4 tasting rooms**
- **5 production wineries**
- **~150 employees**

Huneeus Vintners

Function	Technology System	User Group
ERP	Microsoft Dynamics 365	Accounting
Financial Reporting	Armanino BiX	Accounting
Financial Planning	Excel	Accounting
Management Reporting	Microsoft Power BI	Executive
Sales Reporting	VIP	Wholesale Sales
POS	Microsoft Dynamics 365	DTC
CRM	eCellars/bLoyal	DTC
Supply Chain / Inventory	Excel	Operations
Bulk Wine / Winemaking	vintrace	Winemaking

Trentadue Winery

- **Maryann Pellegrini**, controller
- **3 brands**
- **1 tasting room**
- **1 production facility**
- **vineyard operation**
- **1 event facility**
- **< 25 employees**

Trentadue Winery

Function	Technology System	User Group
ERP	QuickBooks	Accounting
Financial Reporting	QuickBooks	Accounting
Financial Planning	Excel	Accounting
Management Reporting	Excel	Accounting/Executives
Sales Reporting	QuickBooks	Wholesale
POS	VinNOW	DTC
CRM	VinNOW	DTC
Supply Chain / Inventory	Excel	Accounting
Bulk Wine / Winemaking	Winemakers Database	Winemaking

Constellation Brands

- **Alan Atkinson**, director, business analytics
- **Over 100 wine, beer & spirits brands**
 - Robert Mondavi, Kim Crawford, Corona, Ballast Point, Svedka, Casa Noble
- **40 tasting rooms, pubs**
- **40 production facilities – wineries, breweries, distilleries**
- **~8,000 employees**

Constellation Brands

Function	Technology System	User Group
ERP	JDE, SAP	Finance, Operations
Financial Reporting	Hyperion	Finance, Corporate
Financial Planning	Anaplan	Finance
Management Reporting	Microstrategy	All
Sales Reporting	Microstrategy	Commercial
POS	Blue Horseshoe	Hospitality
CRM	Microsoft Dynamics	DTC
Supply Chain / Inventory	JDA	Operations
Bulk Wine / Winemaking	WMS - proprietary	Operations