

**Velosio**<sup>®</sup>



CLIENT SOLUTION CASE STUDY

**Bargetto Winery Pours  
Out Inefficiencies with its  
Move to the Cloud and  
Microsoft Dynamics 365  
Business Central**



**BARGETTO**

MICROSOFT DYNAMICS 365  
BUSINESS CENTRAL



# Overview

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## Software Solutions:

- Microsoft Dynamics 365 Business Central

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## Challenges:

- Running unsupported, outdated software
- Inefficient Finance processes
- Insight constraints

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## Benefits:

- User friendly, intuitive, and interactive app
- 24/7 availability in the cloud
- More efficient, automated processes

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## Company Overview:

Bargetto Family Winery represents the oldest continuous-operation winery in the Santa Cruz Mountains.

**Industry:** Winemaking

**Employees:** 50+

**Headquarters:** Soquel, CA

# Background

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Bargetto Winery has produced hand-crafted wines in the Santa Cruz Mountains since 1933 and through three generations. The family business specializes in estate grown varietals from its vineyard in the Santa Cruz Mountains, overlooking Monterey Bay. The mountainous, cool climate region is host to low-yielding vineyards which produce wines of richness and intensity. Bargetto Winery produces Pinot Noir, Merlot, Pinot Grigio, Chardonnay and several Italian varietals. Of the approximate 5,000 wineries in California, Bargetto Winery is the 10th most historic winery in the state according to the Wines and Vines Directory.

Loretta Bargetto Mujal operates the family winery with her two brothers, John and Martin Bargetto, serving as VP of Finance. Loretta and Accounting/HR Manager Wendy Paz knew it was time to replace their Microsoft Dynamics GP solution for some time. “We were so many versions behind – maybe five

or so – and the cost of upgrading our solution would be more than switching to Microsoft Dynamics 365 Business Central, so we decided to do that,” explains Paz.

Bargetto had considered other solutions in the past but found them cost prohibitive. “Originally, well before my time, we considered one system for the entire winery, but it was going to be \$75,000 a year and that was just too much,” says Paz. Bargetto felt as if transitioning from GP to Business Central was a natural progression of its solution. “BC seemed similar to GP and Velosio had people who worked in BC and GP too, so that was comforting to us,” explains Paz. Mujal and Paz felt comfortable moving forward with the transition to Microsoft Dynamics 365 Business Central with partner Velosio.



**BARGETTO**



# Implementation and Training

The implementation of Microsoft Dynamics 365 Business Central was executed with little hiccups at Bargetto. “I feel like the implementation went very smoothly - it was pretty streamlined. I feel like you guys kind of have that down,” says Paz. After using Microsoft Dynamics GP for so long, Mujal and Paz feel as if there is a learning curve to Microsoft Dynamics 365 Business Central and are still getting used to the additional screens and options for completing tasks. “In BC, there’s a lot of ways to do one process and I feel like that leaves a lot of room for error, but we are still getting used to the new system,” comments Paz.

Paz and Mujal have high praise for their Velosio consultant and are setting up additional training with him now that they have been live on the system for several months. “Our consultant is fantastic, with so much knowledge,” says Mujal. “Working with him was a dream. I think he’s always on the computer. I don’t think he ever has time off. There would be evenings when I would be just working because, you know, I had to get stuff done and he would answer me at 8:00 o’clock at night. And I know he’s on the East Coast and I’m like, why don’t you sleep? We loved working with him because he was very patient with us, and always available,” continues Paz.

## Benefits

The move to the cloud has increased up-time and security for Bargetto. “If for some reason there’s no power at the winery and I’m home, I can still work,” says Paz. “We no longer worry about the server going down. We had an incident with GP where we were concerned that we lost some year-end information after it crashed,” continues Paz. The Finance team finds efficiency as far as cutting down on dual data entry. “In GP we had to post to bank reconciliation and to the general ledger, and in BC, it’s a single entry,” says Paz. Paz is also taking advantage of the ability to customize her Microsoft Dynamics 365 Business Central screen – eliminating information that she doesn’t need. Mujal and Paz find it easier to save reports after the transition to BC – “Saving reports has been really great – in FRx we could only print the report, but you couldn’t manipulate it, but in BC, we can save right to Excel or a .pdf,” says Paz. Mujal feels much more comfortable with up-to-the minute updates in the cloud. “Before, we would only update at the end of the evening.” The team also feels like the end of month closing is smoother in the new system.



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Loretta Bargetto Mujal, VP Finance





## Benefits Roundup

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- ✔ Cloud-based solution increased up-time and security
- ✔ Increased efficiency and cut down double entry
- ✔ Customizable screens
- ✔ Integration with Microsoft Excel is a bonus
- ✔ Access from anywhere, on any device, anytime
- ✔ Smoother month-end close

## Future Plans


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Bargetto is looking to integrate its production, distributor inventory, and POS systems with Microsoft Dynamics 365 Business Central for a holistic view of operations. “It would be nice to have our POS system integrated with BC at some point,” says Paz.



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