

## ***Wine Club and Winery Software Evaluation Questions***

### **Operating Systems**

\_\_\_\_\_ Does the software reside on your computer so you are not reliant on the web company staying in business? Having an industry standard database located on your own computer protects you from being suddenly cut off.

\_\_\_\_\_ Does the software have a built in credit card processor that eliminates the need for buying an additional credit card processing software and support?

\_\_\_\_\_ Does the software come with set up and training to use the entire system; included with the base price at no additional charge?

\_\_\_\_\_ Is the software PCI compliant, and with available credentials?  
(Required for maximum security for credit cards.)

\_\_\_\_\_ Is the POS and Wine Club module part of the same software and communicate without buying an additional integration link?

\_\_\_\_\_ Does the software handle and report on multiple locations tax paid status? Can you have a tax paid inventory location of "Tasting Room" with a separate non-tax paid location of "Back Room"? This is important if you do not tax pay at the time of bottling.

\_\_\_\_\_ Does the software run on the state of the art technology SQL 2008? (Ask your IT guy!)

### **Wine Clubs**

\_\_\_\_\_ Can a cashier view all declined credit cards on a wine club and try to rerun one if a customer requests it without creating another order?

\_\_\_\_\_ Does the software alert cashier for customers with hold for pickup or unpaid orders?

\_\_\_\_\_ Can you automatically re-run a wine club and only process unpaid orders or batch void all unpaid orders if you are unable to collect payment?

\_\_\_\_\_ Can you sign up a new Wine Club member during a sale in POS or within an existing customer account, give automatic discounts and print a membership card in one transaction in less than 5 seconds?

\_\_\_\_\_ Can one customer be in multiple clubs with a unique credit card securely stored for each wine club? How about allowing gift wine club memberships on unique credit cards?

\_\_\_\_\_ Does the software integrate to a loyalty card printer for wine club membership cards, gift cards and cashier login cards?

\_\_\_\_\_ Can a cashier easily allow a customer to change clubs or add another club from POS?

\_\_\_\_\_ Do wine club orders show up in the customer record along with POS orders and web orders so they can be viewed in one place?

## **Shipping**

- \_\_\_\_\_ Does the software integrate directly to UPS for shipping? Meaning – no export required to UPS WorldShip. Does it also allow export to multiple third party shippers and fulfillment houses?
- \_\_\_\_\_ Does the software have a state tax table that integrates with ShipCompliant for current sales tax and doesn't require you to enter and maintain the rate in every customer record?
- \_\_\_\_\_ Can one order be split up into several shipments with the proper tax applied for all destinations on a single invoice?
- \_\_\_\_\_ Is the cashier able to create a shipment then print a shipping label and email a tracking number without leaving the software? Does the software have built in UPS Ready tools?

## **POS/ Marketing**

- \_\_\_\_\_ From within the POS can the cashier see and update all customer and product information?
- \_\_\_\_\_ Does each cashier have a secure log on and their own unique security level?
- \_\_\_\_\_ Can the cashier see all unpaid invoices for the customer and pay them from the POS?
- \_\_\_\_\_ Does the software allow easy and quick entry of new customer data such as email addresses at the time of sale?
- \_\_\_\_\_ From within the Point of Sale can the cashier track and report on the number of tasters by the hour? Report which wine is poured, sampled or donated? Assign notes or customer names to these reports?
- \_\_\_\_\_ Can any note in a customer record automatically pop up as an alert for the cashier?
- \_\_\_\_\_ Can gift certificates be easily registered and available balances tracked?
- \_\_\_\_\_ Do wine club members automatically get their appropriate discount during the first sale when they join? Does the cashier software give automatic self-defined discounts such as 10 percent off 12 bottles? How about automatic employee discounts, grower discounts etc?
- \_\_\_\_\_ Can the software complete a sale without a single touch on a screen or click of a mouse using the barcode scanner and swiping their member or loyalty card and credit card?
- \_\_\_\_\_ Does the software integrate directly to an email marketing company? Does it automatically remove bounced and unsubscribed email addresses from the customer email field, yet retain them in the record so you can check on address issues with the customer?
- \_\_\_\_\_ Does the software come with a search engine designed for telemarketing?

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