

## SHIPPING FOR A CUSTOMER

For a sale where the customer is in the tasting room, in order to add shipping to the sale:

### **To add in shipping to a basic sale:**

After selecting the product and applying any discounts but before processing a payment you can add another step of shipping. In order to ship, a customer record must have been selected or created. Ring up the sale selecting the products that you want to ship to that person. When you have all the products on the invoice that you are shipping, press "Shipping Rates" to get the shipping carrier and charges for the order. Select the appropriate charges by clicking on the row that has the appropriate shipper and cost. A box to "Confirm Shipping Charge" will appear. This gives you the ability to specify how many boxes you are sending. If only 1 shipping charge is appropriate, click OK. If you have more than one box, enter the number of boxes.

**Note:** the shipping charges are set up by the winery in the VinNOW Files, shipping prices set up and should include shipping and handling costs. Only the charges on that table that apply to the destination state of the packing slip will appear for the cashier to choose from.

For information on using UPS or GSO Real-time Rates for shipping instead of the Standard Shipping Rates table please see the books of [UPS Shipping Integration](#) or [GSO Shipping Integration](#).

**Note:** The packing slip will be created and the tax on the invoice will be calculated based on the information in that customer's Shipping tab unless the ship to information is changed on the packing slip using the shipping details button.

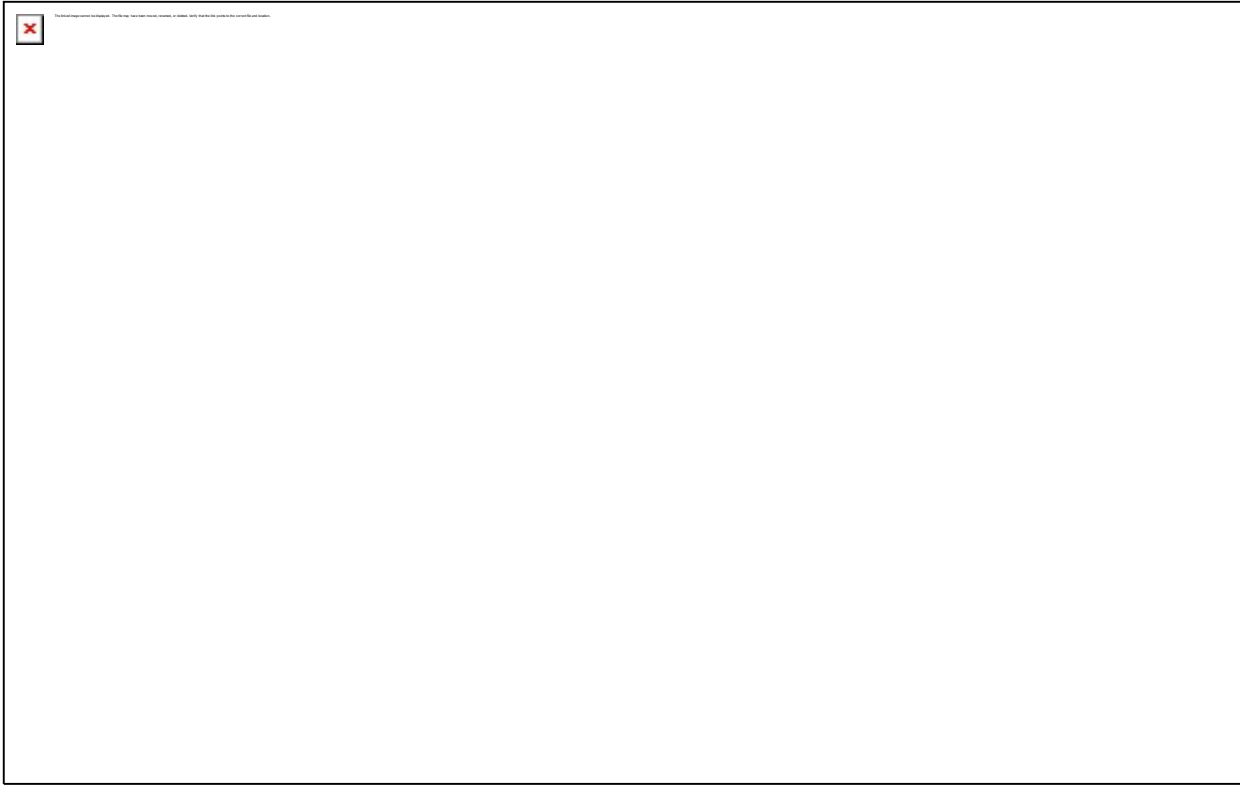
If you select the shipping charges and then add more products to the invoice VinNOW will consider it to be a split shipment where the intent is to only ship what was on the invoice when the shipping charges were applied and that anything added to the invoice after that would be taken with the customer as an on-site sale. If you wish to ship all the items, you must clear the packing slip and apply shipping again or add those products to the existing packing slip (see below).

Note: VinNOW does not allow pre-authorizations on orders with shipping but that does not mean you cannot take a tip.

Here are the steps to take a tip with an order that has shipping charges:

- 1) Create the order
- 2) Suspend the sale
- 3) Give a copy of the Suspended Sales ticket to the customer
- 4) Customer gives you a credit card with the tip amount on the ticket
- 5) Resume the sale
- 6) Click Credit
- 7) Type in the tip amount
- 8) Process the credit card





If there is special handling for the packing slip or you need to change information on it, select "shipping details" which is the button below shipping rates. This will bring up the packing slip. You then have a chance to both confirm or edit the shipping information, change the shipper and add special shipping instructions, or remove an item if the customer is taking something with them but shipping the rest or adding items from the order to the packing slip. In order to remove an item from the packing slip simply change the quantity of that item to zero. To add to the packing slip, use the drop down on the blank product line in the packing slip and select the item you wish to add. You must then OK out of the packing slip to retain the changes. The changes that you make on the packing slip will affect the tax on the order based on the destination tax applied to the sale.

After you have added in the shipping information you can continue on to choosing your payment type and when the sale is complete the invoice will have a status of "to be shipped"

**Caution: If you go into shipping detail and hit "exit" and not "OK", when it returns you to the invoice the shipping charge will not be on the invoice.** From the shipping detail you must select "OK" whenever you go into it in order to keep the shipping charges on the invoice. If you want to clear the entire packing slip then select "exit"

**Adding items to packing slip:** During a sale, once you have applied shipping to the sale you can add additional items from the invoice to the packing slip by selecting the shipping details button. You will see a blank line at the bottom of the products listed on the packing slip. Click into that blank field and use the drop down to add which product(s) you want, tab out then select the quantity.

**Removing items from the packing slip:** You can remove individual items from the packing slip by changing the QTY of the item. If you have multiple bottles and you only want to remove some, change the number to the amount of bottles that are going to be shipped.

If you want to remove all the bottles of that product, change the QTY to zero and tab out. You must then select "OK" to update the packing slip.

If you want to remove all shipping from an order, go into the shipping details and just select exit.

When you exit out of a packing slip you will remove all shipping from the order.

**Note:** The packing slip will only reflect what is on the invoice at the time you select to ship an order. If you add products to the invoice after you have selected shipping, it will assume those items are not going to be shipped, will not have them listed on the packing slip and will assign tax as if it were an onsite sale.

### **Shipping Details: change ship to location**

Once you have added shipping to the order you can change the ship to address information via the shipping details button. The address field at the top of the packing slip has an "edit" button. Click this button and you have the ability to:

- Enter the new information by hand
- Select to look at the customers addresses on file by clicking "cust address"
- Use the binoculars to search the database for any other customer's address

- Update the customers ship to information with the address you have just entered
- Validate the address with ShipCompliant (ShipCompliant Subscribers only)

Once you have entered the information select "OK" to make the change on the packing slip/customer record.

Requested Ship Date and Special shipping instructions can be included on the packing slip, please keep in mind the shipping instructions field has a maximum length of 255 characters.

The shipping rates table can be accessed from shipping details, if you need to change the rate the customer is being charged for shipping, select the shipping rates button and double click on the rate you want to charge. If the rate is nonstandard and therefore not on the shipping rate chart, the amount for shipping can be changed by highlighting that field and entering the amount you wish to charge for shipping. You can also change the shipper by selecting that field and using the drop down to select the shipper you want to add to the packing slip.

The Wine Institute shipping rules can also be accessed from the packing slip by selecting that button as long as you have an active internet connection at that terminal.

Once you exit this screen you must select OK to keep the shipping attached to the order. Any time you select this button and enter the shipping screen if you hit "Exit" and not "OK" all shipping information and charges will be removed from the sale.

**Note: Cash register receipts will show what items were shipped vs which items were given to the customer onsite.**