

ShipCompliant Set Up

To activate your ShipCompliant interface you need to first have contacted ShipCompliant and established a valid ShipCompliant account. Once you have done so, please contact VinNOW support for an activation key.

For ShipCompliant to properly work the computer's time must be within 10 minutes of NIST time.

Shipments are sent to ShipCompliant with a default license relationship and will be received based on your ShipCompliant settings. If you have any questions about your license relationship, please contact ShipCompliant.

The basic steps to starting the integration are to:

Establish your account with ShipCompliant

Contact VinNOW Support for Activation Key

Enter login information in VinNOW system options set up

Make sure products contain correct brand key and alcohol percentage

Upload products to ShipCompliant

Make sure your tax table is appropriately set

Make sure your VinNOW User profile has permissions to access all ShipCompliant features and reports.

Enter your login information (if applicable) to your VinNOW user profile to activate the ShipCompliant Dashboard option in the Utilities Menu

System Option Settings:

Activation Key: This is a unique number assigned to your winery by VinNOW which switches on the ability for your system to communicate with ShipCompliant.

Login ID/Password: This is the Login ID and password that you have set up in your ShipCompliant account that will allow VinNOW web service access. Enter the login ID and password. Note: this is not the same credentials that you use to access the ShipCompliant portal via your browser, this must be a unique ShipCompliant Web user solely for VinNOW access. If you have questions about setting users up in ShipCompliant, please contact ShipCompliant support.

Compliance at Point-Of-Sale: Check this box if you want ShipCompliant to check for compliance automatically at the Point-Of-Sale and if you wish to use the real time ShipCompliant tax rates feature. Checking compliance at point-of-sale is linked to the real time tax feature, checking or unchecking one will also check or uncheck the other. If you chose to not use these features, compliance can still be checked in the shipping module. If this box is not checked, compliance can still be checked at shipping after the sale has been made.

Default Product Brand Key: This is the brand key that ShipCompliant has set up for your winery. It is possible to have more than one brand with ShipCompliant, this block is intended to be a default for ease of product entry. It is recommended you place your primary or most used brand key here.

Default Sent-To-Fulfillment: Select either "InHouse" meaning you do your own shipping, or select from the drop down list your default fulfillment house. This fulfillment house choice can be changed at shipping but what is selected here will be the default display that VinNOW will show when you send an order to fulfillment in the shipping module. Only fulfillment houses that you have authorized in ShipCompliant will display in the drop down list.

Send VinNOW Products to ShipCompliant

Once the ShipCompliant tab in System Options Settings has been set up and your products have been entered you need to send your products to ShipCompliant:

1. Go to Setup menu, VinNOW Files, Products, Product Maintenance.
2. Make sure "Active" is set to "yes" and all other search criteria is blank. Your search criteria should now be set to only find active products. Click "find" and all your products in VinNOW should display.
3. At the top of the screen under **File**, select the option to **Export Product list to ShipCompliant**.
4. A message will display asking if it is OK to export the products to ShipCompliant. Click OK.

After you initially set up the system and upload your products, every time you add or update a product in VinNOW it will automatically update/add the product into the ShipCompliant database for you.

Note: You must track inventory on your products to have them go to ShipCompliant. If you do not track inventory, when you check a packing slip for compliance or try to send it to ShipCompliant, the result will be N/A

VinNOW passes the following information to ShipCompliant when a product is created or updated:

Brand Key

Description

Percent Alcohol

Product Key

Product Type

Unit Price

Varietal

Vintage

Volume Amount

Volume Unit (bottle or ounce)

The alcohol percentage that is sent to ShipCompliant is pulled from the first active lot if you have multiple product lots. If different lots of the same wine have different percentages, we suggest you create different product numbers.

The SC compliance check is specifically designed to not send the following types of products to ShipCompliant:

- The actual bundle product itself (the items on the bundle will be passed individually via the packing slip if the order was developed in VinNOW and not on a Web Cart) ShipCompliant does not have the concept of a bundle as part their system, so only the individual product items in the bundle are
- sent to be compliance checked.
 - Wine club products,
 - Tasting fee products,
 - Wine-by-glass products,
 - Discontinued/inactive products.

➤ *Products that do not have a price.*

➤ *Products that are not set for inventory tracking in VinNOW.*

Tax Table

Once you have set up your ShipCompliant interface, you must establish what tax table your system will be working from. The Tax table is located under the Maintenance Menu. The recommended setting is to use the "Real Time ShipCompliant" tax table option which will use the tax table at ShipCompliant for every sale. The Real Time ShipCompliant tax option is connected to the "check shipping compliance at point of sale" option on the ShipCompliant tab of the System Option Set Up menu. If you do not have the box checked to check shipping compliance at point of sale, and you select the Real Time ShipCompliant tax table, it will automatically check the box to check shipping compliance at point of sale. If you use the Real Time ShipCompliant tax table, all tax figures to include whether or not you tax shipping charges will come directly from ShipCompliant as long as you have the "Collect state sales tax" box checked for all states that you want to charge tax for.

If you are having issues with your internet, you have the option to use the "Aggregate" table that you would set up and maintain yourself. With the Aggregate table, make sure the tax on shipping charges box is checked if appropriate.

Caution: Using the Real Time tax tables, VinNOW only brings down from ShipCompliant the taxes/rules you have set up in your ShipCompliant tax table. If your tax table is set up on ShipCompliant incorrectly (for example: collect base state tax rate and not base + local rate) the tax matrix that is downloaded into VinNOW will not be correct and the correct tax will not be charged on your invoices. If you have any questions on setting up your taxes in ShipCompliant, please contact ShipCompliant support.

Note: if you are using the Real Time ShipCompliant tax table and for some reason you lose your internet connection, VinNOW will default to using the Aggregate tax table for sales. Once your internet is reestablished, make sure to double check that your settings have returned to the Real Time tax table.

Note: ShipCompliant recalculates sales tax on their reports based on total invoice. Since VinNOW can have multiple sales tax on an invoice SC reports



for sales tax may not match VinNOW's sales tax reports. The VinNOW sales tax report shows actual tax collected.

States Table

The States table defaults to checking all states with ShipCompliant. You can choose state-by-state which states to not validate with ShipCompliant if you want by making sure that the "Validate Shipments with ShipCompliant" option is unchecked in the record. If left unchecked you will get a compliance check result of N/A in the shipping table as you have indicated to the system that you do not want the state checked by ShipCompliant. Note: If compliance is checked on an order that is a non-wine item, the result will also be N/A in the shipping module.

Reports

If you have a question about what information on orders or products VinNOW has sent to ShipCompliant, there is a ShipCompliant Upload Log Report located under the reports menu. This report gives you the ability to search by date range and filter by Customer number, Packing Slip number or ShipCompliant request.

ShipCompliant Dashboard

Under the utilities menu is a ShipCompliant Dashboard option which allows the user that is logged in to access their ShipCompliant account if they are set up in both ShipCompliant and VinNOW with permission to do so. Please refer to the SSO Service below for Instructions on accessing the Dashboard.

ShipCompliant SSO Dashboard

You now have the ability within VinNOW to directly sign onto your account via ShipCompliant Single-Sign-On (SSO) Service. This feature is located on the Utilities menu, "ShipCompliant Dashboard". In order to use this feature, you must have;

Valid ShipCompliant Account Credentials entered into VinNOW

User Permissions set in ShipCompliant to allow access via SSO

User Permissions set in VinNOW to access the Utilities Menu

User Permissions set in VinNOW to access the ShipCompliant Dashboard.

Please keep in mind VinNOW does not recommend any type of generic or admin user sign on. Every user signing into VinNOW should have their own

personal sign on with specific user permissions assigned. VinNOW users should ensure their password is kept confidential.

Once your integration is active, you will need to give permission within ShipCompliant for your VinNOW user to utilize the SSO Service. To do so, log into your ShipCompliant account, go to "Manage Users" then pick your user and "edit". You can then select to "Authorize SSO" and chose VinNOW. Save the change to your ShipCompliant user profile.

If you need assistance or have questions on setting up user permissions within ShipCompliant, please contact ShipCompliant Support. After your VinNOW user has permission to use SSO in ShipCompliant you must grant permission within VinNOW User Maintenance to access this feature. From the Set Up Menu, Users, User Maintenance select your user. When you click into your user you will see a "ShipCompliant" tab at the bottom, click into that tab.

User Settings Maintenance

Exit

VinNOW

Update

<< >>

User ID: Barb Inactive

User Name: Barbara

Title: Manager

Sales ID: Barb

Prompt for Training DB Training DB Only

Time Clock Work Type: Required to select at clock-in

Security Settings Search Screen BackOffices Defaults ShipCompliant

Login Email Address: barbara@vinnow.com

Navigation: Home

Your ShipCompliant User Login Name and default login page

Enter the user login name that you use to sign into ShipCompliant, the one that you gave SSO permissions to in the previous step. From the Navigation drop down you can select which page you want to automatically be logged in to on your ShipCompliant site.

On the "Security Settings" tab, if you are not an "admin" user with permission to every function within VinNOW, select "Edit Security Profile"

Security Settings Search Screen BackOffices Defaults ShipCompliant

Select to Edit Security Profile

Security Template: Custom

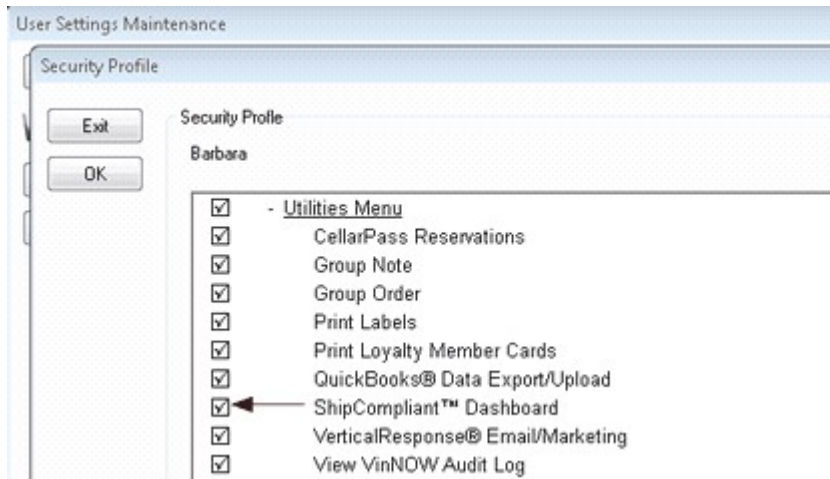
Edit Security Profile

Password:

Confirm Password:

Print Cashier Login Card

Once you have done so, make sure that the user permission for ShipCompliant Dashboard is checked otherwise the menu option will be grayed out and you will not be able to access the feature.



Now that you have set your login and permissions to access the ShipCompliant Dashboard you will be able to access your ShipCompliant account as long as you have a working internet connection for your workstation.