

Standard Shipping

Standard Shipping (Not the integrated UPS module) is accessed from Customer Search under the Maintenance Menu. A shortcut key is Ctrl-S from the Back Office. In addition to shipping orders, the standard shipping module is also used to work with/change the status of packing slips, and to develop lists of items that are hold for pick up, orders that need to be sent to fulfillment, or shipped.

Note: This section covers standard shipping features for all users and shipping for customers that are not ShipCompliant subscribers. ShipCompliant subscribers should also see the ShipCompliant book in Help on the Web for more information on shipping through VinNOW using ShipCompliant services.

Search for Orders to Ship

Select orders to be searched or shipped via the selection criteria at the top. The default Order Status is To Be Shipped, if you are unsure of the status or you are looking for all orders on a specific date, blank out the order status and then put in the other criteria you wish to use. You can use any of the search fields together to get the information you need and can change any of the search fields that are underlined so that you can bracket fields such as dates by using operators such as > and <=. This search screen works the same as any other in VinNOW search, and the more information you put in the search, the narrower your search results will be.

The message <<< SHIPMENTS ARE PAST DUE!! >>> shows on top of the Customer Search Screen in back office if you have at least one Packing Slip in a "To Be Shipped" status. It is possible to have this message display even if you do not have a Invoice in a to be shipped status, as for the purpose of this message, invoices and packing slips are independent of each other.

Note: Keep in mind what you are searching for in the shipping area is packing slips- orders with shipping attached. If the order did not have a packing slip (shipping attached) you may not find it in your search and you should check the invoice.

Note: if you are searching for packing slips between specific ship dates, you must have changed the status of the packing slip in the shipping section and assigned a date or you may not get that packing slip returned in your search results.

To sort any search result list, simply double click the column heading you wish to sort, you can then toggle the results in an a-z or z-a sort format.

Selecting Orders

By clicking on the check mark at the top of the first column all packing slips displayed will be selected. You can also individually select the packing slips you wish to make changes to by clicking to put a check mark in the box to the left of the invoice number. Once checked you can Update the Order Status, or do an Export, or Print a List, or Print the Packing Slips, or view the invoices or packing slips using the buttons to the left of the list or by options in the Process Menu at the top of the screen.

Update Status

Once you have selected the order you wish to update, when you click the update status button another window will appear that will give you the option to update the status and enter the ship date. The status will default to the natural progression of the packing slip (i.e. to be shipped will be shipped, hold for pick up will be picked up) but you can change it by using the drop down if you wish to pick another status. The date will default to the current date but that also can be changed by either entering the date in a mm/dd/yyyy format or clicking on the date and using the calendar.

Shipping Menus

File- Exit VinNOW

Process-

- Print Invoices- Used when shipments are selected to print the invoices for the shipments
- Print Standard Packing Slips-Used when shipments are selected to print standard packing slips for the shipments
- Print Wine Country Shipping Packing Slips- Used to print packing slips for the selected shipments in the Wine Country shipping (Sonoma County) format.
- Save Shipments to ShipCompliant -Used by ShipCompliant customers to re-save orders.
- Void ShipCompliant Shipments- Used by ShipCompliant customers to void shipments.

Reports-

- ShipCompliant Upload Log
- Shipping Status Report

Utilities-

- ShipCompliant Dashboard
- Fedex, GSO, UPS website links

Help- Any Help Menu in VinNOW will give you access to Help on the Web and Send a message to VinNOW support

View button -

Which packing slip you are viewing is determined by which packing slip number is highlighted, not which is check marked. When viewing the Packing Slip Order Status and Shipper can be changed however, shipping charges cannot be changed.

Printing a Shipping List

Print List button - Use this option when you want to print a shipping list based on packing slips. One reason you may want to print this list is to generate a list of Hold for Pickup Orders. To do so you would search on Hold for Pickup orders (Status), check them off, then click on Print List. Any order status and search criteria can be used, then a shipping list can be printed.

There are 5 different options with the Print List that will have the report display different information. You can select any or all of the options separately or together. The options are:

Do not check any of the boxes and you will get a basic list of the invoice number, status, and the customers information.

- **Check Show Inventory Summary-** will add to the report a listing at the bottom that is a summary of inventory needed for the orders
- **Show Item Details-**will list under the invoice the details of the items that are on the packing slip
- **Show Tracking Number-** will show any tracking numbers that are on the packing slips.
- **Show Saved to ShipCompliant Status-**will show the ShipCompliant status based on the compliant column in VinNOW.

Printing Hold for Pickup Invoices

To print invoices for "hold for pickup" orders:

- Make sure your user profile has "no prompt" selected for back-office invoice printing, otherwise the invoices will all display first and you will have to manually select them to print.
- Open the standard shipping module in VinNOW (maintenance menu>shipping)
- Perform a search for "hold for pickup" orders (you can add a group order number if you are looking for a specific wine club)
- Check the invoices to print or click the check mark at the top to select all
- Click on the process menu at the top of the screen
- Select print invoices

This process will work for any status invoice, though it is mostly used for "Hold for Pickup" and "Shipped" orders.

Please note - In the lower part of the screen to the left of Invoice #, if you see a 4 instead of a check, then your computer is missing the font we use called Monotype Sorts. To obtain information about Monotype Sorts (mtsorts.ttf) font please refer to the Microsoft Website at <http://www.microsoft.com/typography/fonts/font.aspx?FMID=362>