

# ShipCompliant Shipping

## Checking compliance

Compliance can be checked at the time the order is processed for shipping. This is done in the regular Shipping module.

Search for orders that are in a "to be shipped" status, either searching for all orders, or filtering your search to only pull up the "to be shipped" orders you want to ship.

To choose all orders displayed, click on the black check mark at the top of the column, next to the "Invoice" heading. To choose individual orders, click in the box to the left of the invoice number you want to check.

After choosing the orders, click on the "Check Compliance" button. All the checked orders will be compliance checked, click on **OK** to proceed. The compliant Status will be displayed in the Compliance Column. If the order is not compliant a message will display with the reason that the shipment is not compliant. In order to view this message again, you will need to check compliance again and the message will display.

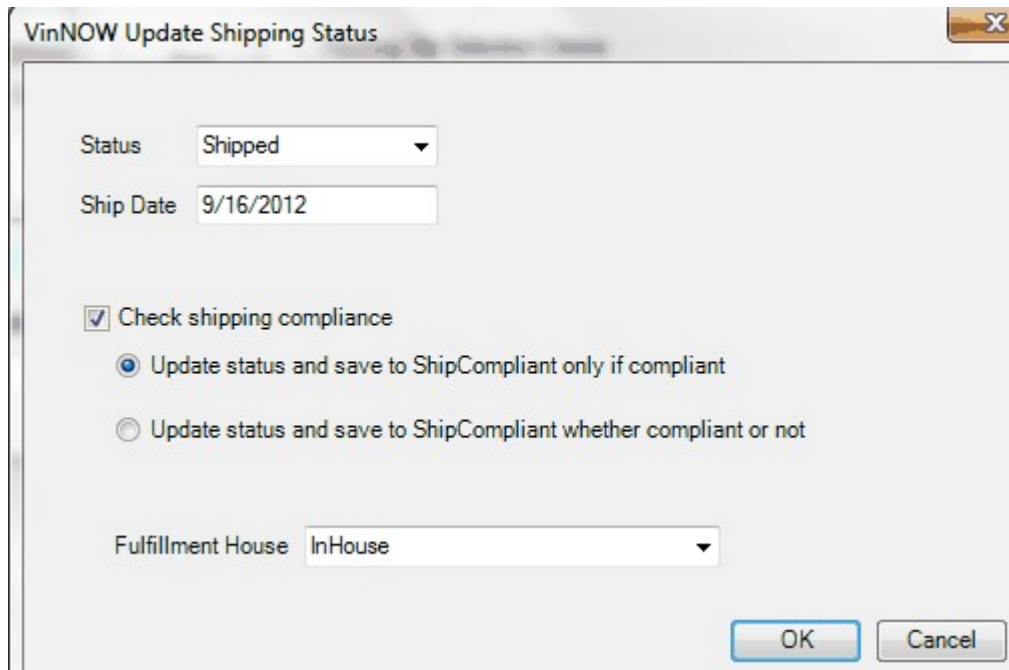
When you check compliance of an order in shipping, it will always save the order to ShipCompliant if the order is compliant. The status the order will be saved as will be determined by what the status is in the status column at the time of the compliance check.

**Caution:** When using fulfillment houses, the fulfillment house will directly update the order status in ShipCompliant independent of VinNOW. You should not check the compliance status of an order that you have already sent to fulfillment if you do not know whether the order has been updated in ShipCompliant, or if you are reasonably sure the fulfillment house has already shipped the order. If the order status in VinNOW is "sent to fulfillment" and you check compliance you risk sending the order to your fulfillment house again if it had already been shipped.

## Updating Shipping Status

When you are ready to update the shipping status, once you select an invoice(s) and click "update status" a box will appear which will give you the ability to enter the status you are updating to, the date, check compliance again, update the status and save to ShipCompliant only if compliant, update

status and save to ShipCompliant whether compliant or not, and select the fulfillment house. Once these decisions are made simply select OK and the order will process.



Once the process is completed, the compliance status is shown for each order.

**WARNING:** If your order is sent to fulfillment, do not to change the order status to shipped in VinNOW until after you have been notified by your fulfillment house that the order has shipped, If changed to shipped, your fulfillment house may not ship the order! Your shipper will update the status to shipped in ShipCompliant.

### Voiding Orders

If you have sent an order to ShipCompliant that you want to void you can do so via the process menu. Select the order, go to the process menu and select "Void ShipCompliant Shipment". This will void the shipment in ShipCompliant.

If you ship UPS or GSO, you also have the ability to check compliance for those orders in UPS or GSO shipping. note:When the UPS label is printed the order is automatically saved to ShipCompliant.

## Tracking Numbers:

UPS Tracking numbers generated within VinNOW are sent to ShipCompliant from VinNOW.

## To Import A Tracking Number From ShipCompliant For A VinNOW Order:

Tracking numbers can be imported to VinNOW via the Shipping Maintenance or the Customer Record.

1. In the Customer record click on the "Shipments" Tab then double click on the "Invoice" number that you want to import the tracking number for:

Customer Maintenance

VinNOW 1013 Ford, Gerald

Customer Since: 11/6/2012 Wine Club: Cellar Grande WC  
 Futures Buyer: No  
 Most Purchased: Zinfandel

Customer Notes\*\* Orders  
 Primary Customer Info Shipping Info  
 Wine Clubs Shipments

Then Double Click on the Invoice Number to see the Packing Slip

First click on the "Shipments" Tab in the customer record

Invoice	Order Date	Ship Date	Status	Shipper	Compliant	Recipient	Ship T
1473-1	10/15/2013	10/15/2013	Shipped	UPS Ground	YES	Gerald Ford	Omaha
1317-1	06/21/2013	06/21/2013	Shipped	GSO	YES	Gerald Ford	Omaha

2. The packing slip will display. Click on “tracking”

Shipment Packing Slip

**Shipment No: 1317-1**

Exit

OK

Ship To

Gerald Ford (402) 222-1038  
100 N. 62nd Street  
Omaha, NE 68132

Click "Tracking" to get Tracking Number

Tracking

Shipment Status: Shipped

Compliance Is Compliant/Saved

Actual Ship Date: 6/21/2013

Request Ship Date:

Shipper Service: GSO

Shipping Amount: \$0.00

Product	Unit	Qty
112 - 2006 Orange Muscat	Bottle	1

Edit

Shipping Rates

Shipping Rules

3. If the shipment has a tracking number assigned, a ShipCompliant box will appear which tells you the Shipment number, compliance status, tracking number and tracking status:

ShipCompliant

Shipment: 1317-1  
Compliance Status: true  
Tracking Number: 555555555555  
Tracking Status: InTransit

OK

4. Select Ok and the tracking number will populate on the Packing Slip in VinNOW

**Shipment No: 1317-1**

Ship To  
 Gerald Ford (402) 222-1038  
 100 N. 62nd Street  
 Omaha, NE 68132

Product	Unit	Qty
112 - 2006 Orange Muscat	Bottle	1

Tracking: 555555555555  
 Shipment Status: Shipped  
 Compliance: Is Compliant/Saved  
 Actual Ship Date: 6/21/2013  
 Request Ship Date:

If your shipment is still waiting to be assigned a tracking number you will get a status of not available on your ShipCompliant Message:

Shipment: 1442-1  
 Compliance Status: true  
 Tracking Number:  
 Tracking Status: Not Available

OK

To import from Shipping Maintenance the steps are the same, however, instead of accessing the packing slip from the Customer record, the Packing slip is accessed from Shipping. Once you click on the invoice in shipping the packing slip will display as in step 2 above:

The screenshot shows the 'Shipping' module interface. At the top, there are menu options: File, Process, Reports, Utility, and Help. Below this is a 'Packing Slip Selection Criteria' section with a 'Find' button and a 'Status' dropdown menu set to 'Sent To Fulfillment'. Other search criteria include Group Order #, Order Type, State, Recipient, Shipper/Service, Order Date, Compliant, Zip Code, Sales ID, Ship Date, Request Date, Saved @ ShipCompliant, Product, and From Ship Date. A yellow callout bubble points to the 'Invoice' column in the table below, with the text 'Click on "invoice" to see packing slip'. The table contains the following data:

Invoice	Order Date	Status	Compliant	Shipper/Service	Ship Date	Recipient	City	State	Zip Code
1395-1	08/07/2013	Sent To Fulfillment	YES/Saved	UPS Ground	09/05/2013	Monroe, James	New York	NY	10014
1401-1	08/09/2013	Sent To Fulfillment	YES/Saved	UPS Ground	08/29/2013	Arthur, Chester	East Fairfield	VT	05448
1423-1	08/23/2013	Sent To Fulfillment	/Saved	UPS Ground	08/23/2013	Buchanan, James	Lancaster	PA	17603
1429-1	09/05/2013	Sent To Fulfillment	YES/Saved	UPS Ground	09/05/2013	Carter, Jimmy	Plains	GA	31780
1442-1	09/12/2013	Sent To Fulfillment	N/A	UPS Ground	09/12/2013	Bush, George W.	Crawford	TX	76338

If an order is not compliant and you want to see again what the message from ShipCompliant is, open the packing slip and make sure "Compliance" is checked and click ok. This will display the message from ShipCompliant again.

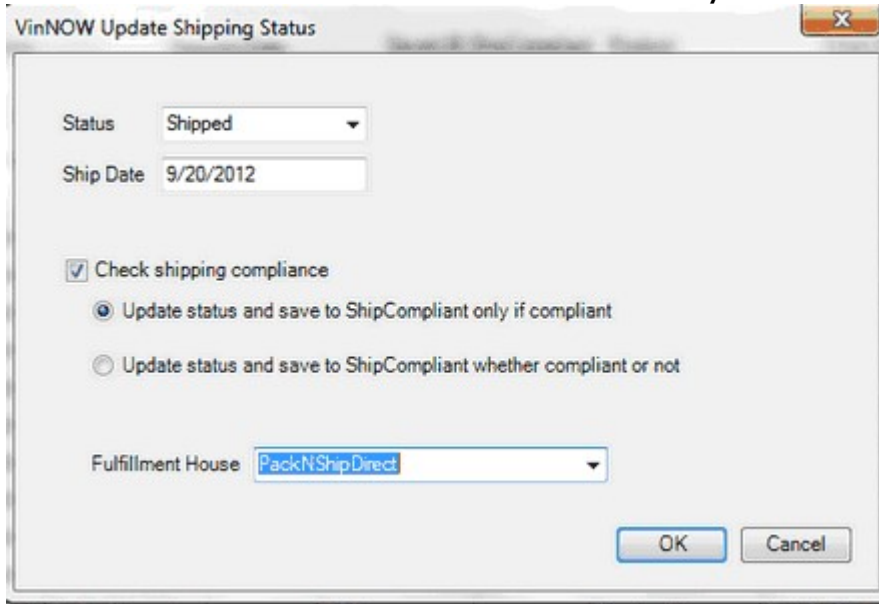
## Sending to Fulfillment

Note: Your Shipper/Service files must have the appropriate PSD/ShipCompliant Export Code associated with the Shipper. This is the code that your fulfillment house uses to know what type of shipping service to send the orders with. These codes are tied to the shipper and can be found in the Set Up Menu, VinNOW Files, shipper/service edit the shipper. If you have any questions about what value should be in this field, contact ShipCompliant to get the correct shipping export code to select.

- 1 - Open the VinNOW standard shipping module and search for the orders that are "To Be Shipped" by selecting To Be Shipped in the Status drop down list, then clicking on Find.
- 2 - Place check marks next to the orders you would like to ship by clicking in the box next to the invoice number. Note: you can select all the orders

that are currently displayed by clicking on the black check mark at the top of the column to the left of the invoice column.

3 - Click the Update Status Button, which will open a window to allow you to set the status of the order and select your Fulfillment House.



4 - Check the "Check Shipping Compliance" box If you want to send the order to ShipCompliant and then select if you want the order saved only if it is compliant or whether or not it is compliant, and then select your fulfillment house. If you do not want to send the order to ShipCompliant/Fulfillment and only want to update the status of the order, uncheck the "Check Shipping Compliance" and the order will not be sent to ShipCompliant.

Note: If you do not see the fulfillment house you wish to use in the drop down, contact ShipCompliant support as only the fulfillment houses you have set up in your ShipCompliant account will show in this drop down.

Note: Sending the order to ShipCompliant will also check compliance on the order. If the order only contains a non-wine item, the result will be N/A in the shipping module. Also, the compliance result can be N/A if the ship to state is not set to Validate Shipments with ShipCompliant in the States table.



Note: Once you have followed these steps your order will be changed to a status of "sent to fulfillment" in VinNOW and will be forwarded to your fulfillment house by ShipCompliant. The fulfillment house will ship the orders via the carrier that is listed on the packing slip based on the PSD/ShipCompliant Export Code located in the VinNOW Files Shipper/Service table.

Caution: When using fulfillment houses, the fulfillment house will directly update the order status in ShipCompliant independent of VinNOW. You should not check the compliance status of an order that you have already sent to fulfillment if you do not know whether the order has been updated in ShipCompliant by the fulfillment house, or if you are reasonably sure the fulfillment house has already shipped the order. If the order status in VinNOW is "sent to fulfillment" and you check compliance or update the status you risk sending the order to your fulfillment house again if it had already been shipped.

In addition, if you recheck compliance on an order that has a tracking number assigned in ShipCompliant and you have not first downloaded the tracking number into VinNOW by using the "tracking" number button on the packing slip, when you check compliance again it will remove the tracking number from ShipCompliant. Always check for tracking numbers before rechecking or resending any packing slips to ShipCompliant.

Once you have sent your orders to fulfillment, by using the "print list" button you can print a hard copy of what was sent.

## **Resend information to ShipCompliant**

Should you have internet connection issues, or you are not sure ShipCompliant has an invoice, you can manually resend your shipping information to ShipCompliant. If you are on an existing VinNOW system and then start using ShipCompliant, you can upload your previous data for that year so that you will be able to get accurate quarterly/yearly reports from them if you desire.

From the Maintenance menu choose Shipping.





Set the order selection criteria to find the orders you want to re-send to ShipCompliant.

Note: Try using Status of Shipped and a From Ship Date and a To Ship Date (enter the dates). As long as you have correctly been "updating the status" of your orders through shipping and not just changing the status in the invoice/packing slip to shipped there will be a date assigned to the status and all your orders will display using this search criteria.

Once you have your list of orders, check the ones you want to re-send, or click the black check mark to select all. If an order is not checked it will not be resent. If the order already exists in ShipCompliant it will not duplicate the order so your reporting will still be accurate.

Go to Process menu at the top of the screen and select "Save Shipments to ShipCompliant".

Note: Once you have sent an order to fulfillment, do not save the order to ShipCompliant again as it may interfere with the fulfillment process.