



Implementation Process Guidelines

Once you're ready to start we will help you throughout the OrderPort setup process. Our goal is to make it as easy as possible and to have you ready to use the system.

Some Frequently Asked Questions

- 1. How long does the setup process take?** We recommend allowing 2-4 weeks for implementation and training, but you will set the schedule. Based on your required go-live date we will create a plan for your account configuration, data migration and training to meet your deadline.
- 2. How do I get help during implementation?** You will be assigned an Implementation Specialist who will walk you through the entire process. Throughout implementation, you will have weekly virtual conferences to check up on progress and answer your questions. Outside of the weekly scheduled calls, you can reach your Implementation Specialist via email and phone.
- 3. How do we move our customer, club and product data from our old system to OrderPort?** We have migrated wineries from every winery system and we'll help you with the data extraction process so it can be prepared for import to OrderPort.
- 4. What about training?** We'll conduct online staff training sessions, by department during the implementation process. You'll also have access to the Help section of the OrderPort administration site which includes an extensive library of system documentation, training documents and videos. We've created a by-department curriculum to make it easy to use.
- 5. How do we get support after go-live?** The OrderPort Support team is available 7 days per week by phone, email and helpdesk. Support hours are 9:00am to 6:00pm PST. We are also available after hours in case of an emergency.

The Process

An OrderPort Implementation Specialist will setup an introductory phone call to discuss the process. You won't need to prepare much for the call. You'll confirm contacts for the setup process and review some basic information about your products, wine club levels, discounts and the OrderPort modules you will be using to start service. You'll also set the meeting schedule for next steps.

During the first meeting following the introductory call we will:

- Provide sign-in credentials for your staff
- Complete an OrderPort Admin Introduction including how to sign-in, setup user accounts and more.
- Create Wine Clubs and Customer Classes
- Begin to work in the Catalog Manager by adding a few products
- Set your go-live date and schedule data migrations
- Review the step by step plan to have you ready to go-live

The Plan

1. Data Migration: Below are the different types of data that can be imported into OrderPort.

A. Catalog Data: OrderPort can load your product data from an .xls, .xlsx or .csv file. It is also possible for you to

manually add your products through the Catalog Manager. Manually adding products is the recommended option for wineries with smaller catalogs (100 products or less).

B. Customer Account Data: OrderPort can load all customer accounts from your previous system, including wine club members, wholesale, distributor, consumer, etc. We generally recommend loading the data shortly before your go-live to ensure that your lists are up-to-date, but it can be loaded earlier in the implementation process if desired.

C. Credit Card Data: there are several techniques for migrating credit card data from your old system to OrderPort. Your Implementation Specialist can help you determine the correct approach for your situation. Below are the most common techniques:

- *Your winery manually inputs credit cards after the customer account import.* This is a good option for smaller clubs or if you keep copies of your customers' credit card information.
- *Your winery includes credit card data in the customer account upload spreadsheet.* This is a good option if you already have credit card data stored in a spreadsheet or if your previous system provider is able to provide you with an extraction of your customer data that includes credit card numbers. If you do provide OrderPort with a spreadsheet of customer data that includes credit cards, please consult with your Implementation Specialist before sending the data. We have special procedures for you to follow when transmitting sensitive customer data.
- *Your winery requests a credit card data extraction from your previous credit card processor.* Your previous credit card processor will send it directly to your new credit card processor. You will also need to request an extraction of credit card tokens from your previous POS/Wine Club system provider. Token data is not typically readily available for end users to extract.
- *If you already use a credit card processor that is compatible with OrderPort, and you plan to continue using that processor with OrderPort, then no credit card data migration is necessary.* You only need to provide OrderPort with the credit card token data from your previous system. Credit card tokens are what links customer accounts in OrderPort to their corresponding credit card(s) in the payment gateway.

D. Order History Data: it is not required to import order history data from your previous system, but it is an option. It is recommended that order history data be imported into OrderPort shortly after your go live. This is because extracting your order history data before going live on OrderPort can cause some of the final orders placed on your previous system to be missed. Order history is compiled within Excel spreadsheets and must be formatted to OrderPort specifications to be imported. There are a few limitations on the orders that can be imported:

- Two (2) years of order history can be imported and included within the Customer Relationship Management (CRM) data accessible in the Point-of-Sale. Order History beyond two (2) years can be imported and archived for use in Annualized Reports only.
- Only fully-paid and fully-released orders can be imported, no pending pick-up orders or unpaid orders.
- Only orders for customers with accounts can be imported. It is not possible to import "guest" orders.
- Imported order data will not be included in Standard Reports or My Reports. Individual order detail will be accessible in the Customer Service Module but not available for editing. To report on sales that occurred prior to your installation of OrderPort, you should either save hardcopies of sales reports from your previous system or rely on your accounting system instead.

2. Merchant Services: You will be introduced to a merchant services provider who will help you set up your payment processing accounts. Once your accounts are set up, your Implementation Specialist will connect your processing accounts to your OrderPort system. Your credit card readers will be obtained directly through your payment processor.

3. eCommerce: OrderPort designers and developers will create a webstore utilizing your website graphics, fonts and color palette. All OrderPort created pages are built with responsive design for optimized viewing on mobile devices and we can advise you on website and webstore ADA compliance. To get started on your webstore, we only need to see the approved website design, either in production or in a development environment. If you are using any proprietary fonts that are not in the public domain, we will need access to those files so that we can use them on your webstore. It will take OrderPort's designers approximately one (1) week to build your webstore. After your webstore is built, you will be responsible for configuring the content on the webstore including: product images, product descriptions, tasting notes, wine details, wine club descriptions and terms and conditions. Your implementation specialist will provide guidance and suggestions on each of these points to optimize the customer shopping experience.

4. Wine Club Processing: When you process your first wine club release on OrderPort, you can schedule a meeting with your Implementation Specialist to get step-by-step instruction and guidance. We will co-pilot the release with you to ensure smooth processing.

5. Tasting Room Hardware: An up-to-date list of all compatible hardware can be found on the OrderPort website under "Hardware". We don't sell the hardware directly, but we list the model numbers and provide links to sites where you can purchase. Your Implementation Specialist can help you review the options and make the correct selections for your tasting room.

6. Point-of-Sale Training: After you have obtained your POS hardware and have set up your merchant services accounts, you can schedule a POS training session with your Implementation Specialist. The training generally lasts one (1) hour and will cover opening and closing procedures, various workflows for creating orders, signing up wine club members, recording tasting room samples, and more.

7. Essential Integration: OrderPort supports integration with a variety of 3rd party applications. Your Implementation Specialist will help you figure out which applications you will need to integrate with your OrderPort system. Below are some of the most common integrations.

- A. FedEx, UPS and GSO
- B. Fort Systems
- C. Wine Shipping, Oregon Wine Services
- D. CellarPass
- E. Merchant Services
- F. ShipCompliant
- G. PayPal
- H. QuickBooks

8. Go-Live and Support: Once you are live on the system the OrderPort Support team will be available if you need help. Support is available 7 days per week by phone, email and helpdesk.

On Thursday's at 10:00am PST we host an OrderPort Webinar for customers. During the webinar we review new and upcoming system features and respond to customer questions and suggestions.

All customers are encouraged to join the OrderPort Facebook Community. The community is moderated by the OrderPort Support team and community members can post questions and interact with other OrderPort customers.



POS | Club | eCommerce | Reservations | Loyalty | Essential Integration
