WineShop At Home

App User Guide
Getting Started

Step 1: Download your WineShop At Home App from the Apple App Store or Google Play Store. Note: you’ll be prompted to update your current version if you already have it installed on your device. An updated App icon which will appear on your device screen.

Log in: Enter your app username and 6-digit PIN

If you’ve never had access to the App, tap on “Sign Up” to create a username
New App User Sign Up

If you’ve never used the App and do not have a username and PIN, tap on the “Sign Up” button at the bottom of the Login Screen.

On the next screen you’ll be prompted to enter your Wine Cellar credentials (email and password). You will then receive a Welcome email with your temporary PIN to access the App.
PIN Reset

Tap “Forgot PIN” from the Login screen and follow the instruction on the next screen to reset your PIN.

Enter the same email address you used to register with this account or that you use to access your Wine Cellar. A temporary PIN will be emailed to you and upon re-entering the App, you will be prompted to update the PIN.
First-time Login

Upon entering the App for the first time, a pop up message will ask to allow the App to send you notifications. Tap on “OK” so you can be sure to receive the latest messages and communications from WineShop At Home.

Content will then start downloading and populating the various sections of the App. The “Downloading” notification will appear anytime new materials are published to the app from WineShop At Home and badges will show unread content.
Home Screen

The Menu button will provide access to all the sections available on the App.

Badges indicate number of unread items.
Tapping on the “Settings” wheel (last item on the Menu) will allow you to Change your App access PIN, Reset all the Badges, and request Help.
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Placing Orders
Placing Orders

Your WSAH App comes with two catalogs accessible from the Home screen.

**Products** provides access to all the products available in a tiled format. This will have the most current list of items available for purchase.

**Catalog** provides a flip-book experience of the WSAH catalog.
Product Listing

Tap inside any product tile and a pop up will appear with the description of the product.

Tap on the Shopping Cart icon, or the Plus icon below the product tile and you will be prompted to create a Cart, unless one is already open (see next page).
Product Listing

Once a cart is created and selected (highlighted), items can be automatically placed in the cart by tapping on the plus icon.

Detailed view of the item will also show an icon for entering the product in the specified cart.
A flip-book style catalog is also published on your app. Swipe with your finger from side to side to flip through the catalog pages. Double tap anywhere on the page where you see products you’re interested in adding to a cart, and a popup will display all available products on the current pages.
Placing Orders – Multiple Shopping Carts

Multiple shopping Carts can be created whether you’re ordering for your customers in Single Orders or as part of a Tasting.

The right side of the bottom menu bar will display “Place Orders” when viewing shopping carts for individual orders outside of a Tasting.

Or will display the currently selected Tasting.

Tapping will show all the available Tastings and associated shopping carts.

Host cart is identified by an icon.
Viewing and Editing a Cart

To view a Cart, tap on the Shopping Cart with up Arrow icon.

Increase the quantity of any item by tapping anywhere in the white area, or on the “plus” icon.

Decrease by tapping on the minus icon.

Remove the line item completely by swiping from left to right and tapping on the Delete button.

Remove the whole cart by tapping on the Trash Can icon.

Email the contents of the cart to your prospect or customer to keep track of their order or wish list – a copy of the email will be sent to your email.
Fill out all the requested information or use Lookup to search by First OR Last name and automatically populate all the information.

On the “Summary” screen, select the Shipping Method and all calculations including tax and bottle ship limits will be automatically processed.

Tap on “Next” to finalize the order and enter Credit Card payment information.
Processing a Credit Card

You can enter the Credit Card number, expiration date and Security Code manually.

If you have purchased a Credit Card reader, you will see “Swipe Card” instead of “Read Card”

By tapping on “Read Card” a new window will appear, to allow you to Scan the Credit Card with your device Camera. *NOTE: This feature only works on cards with embossed numbers.*

When the Credit Card is properly aligned, you will see all borders lit around the perimeter of the scan area.

Once, all the information is complete, tap on Finish to complete the transaction. A Confirmation message will appear with, the order number.

Order Sent
Your order No. 1924353 was successfully sent
Select “Order History” to get a view of all the Open and Closed shopping carts.

A Lock icon means the Cart has been submitted and no more changes are possible.

Tapping on the Pencil icon will open the cart to allow changes to its contents. Checkout will open directly to the customer information screen to complete the ordering process.
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Creating a Tasting
Setting Up a New Tasting

To set up a New Tasting, tap on the appropriate tab on the Menu.

On the next screen, tap on the wine glass icon.
Setting up a new Tasting

Fill out all the fields as you would normally in your Wine Cellar

Note that for the “date scroller”, you must tap the “grey” area to be able to scroll through the fields. Once you’ve selected the date for the Tasting, tap on the visible row and it will insert the date in the appropriate field.

Using the Lookup function:

You can search through your customer list by typing a partial or full name in either the First OR Last name fields.

For the Address information, enter a Zip code then press Lookup and the system will retrieve the City, County, and State automatically.
Setting Up a New Tasting

“Synchronize” will connect with your Wine Cellar and ensure your App and back office Tastings are in sync.

Once all the fields are complete, the Save button will be highlighted. Tapping, will take you to the Tasting Summary screen.

Selecting “View” will provide a filter for all the available Tastings.
Placing a Sampler Order

From the Tasting’s Menu, tap on the > arrow of the Tasting you want to select.

Then tap on “Sampler Order” to enter the next set of screens.

“Details” will provide a view of the Tasting information and the ability to make updates until the Sampler Order has shipped.
Selecting a Sampler Order

Scroll through the Sampler Options and tap on the desired one. Select Host Gift and Add-on (Optional).

Once all required selections have been made, the “Next” button will highlight and take you to the Payment information screen.

Type, Scan, or Swipe the Credit Card info.
Checking the Status of the Sampler Order

Select a Tasting by tapping on the > arrow. Then tap “Sampler Order”.

A colored dot next to each Tasting indicates its status.
Closing a Tasting

To close a Tasting, all shopping carts need to be closed first.

Tap on Host Order to complete the process of closing out a Tasting.

Submitted carts will show a lock icon, all others will be accessible for editing and checkout.
Host Order & Rewards

The next set of screens will take you through the steps and selections to complete a Host Order, including selecting their Rewards.

Note: It is not necessary for the Host to purchase any items.
The Summary page will provide a review of all the selections.

The next screen will prompt for CC payment information, complete the transaction, and close out the Tasting.

<table>
<thead>
<tr>
<th>Cart Detail</th>
<th>Subtotal</th>
<th>Tax</th>
<th>Shipping</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Duet Gift Box: Reds</td>
<td>$ 59.95</td>
<td>$ 17.99</td>
<td>$ 68.00</td>
<td>$ 310.85</td>
</tr>
<tr>
<td>Premium Trio Gift Box</td>
<td>$ 89.95</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Rewards Detail</th>
<th>Artisan 5 Star The Master Stem (Set of 4)</th>
<th>only $39.97</th>
<th>01</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Artisan 5 Star The Sparkler Stem (Set of 4)</td>
<td>only $34.97</td>
<td>01</td>
</tr>
</tbody>
</table>
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Sponsoring a New IWC
Sponsoring a New IWC

To enroll a new Independent Wine Consultant, select the “Sponsor” tab from the Menu.

Fill out all the fields accordingly.
Depending on the selection for Payment Method, new fields will appear to provide Direct Deposit information.

Continue the registration process by selecting a Replicated Site URL and Extranet password.
The Final step to the enrollment process is to agree to the Terms & Conditions and digitally sign.

Tapping on the Sign button will bring up a new window where you can capture the enrollee’s signature.
Business Kit Order for New IWC

The bar at the top of the screen will guide you through each step in the enrollment process.

Once the selections are made, the “Next” button will highlight.

Sponsoring a new IWC
Business Kit Order for New IWC

Follow through the screens until the final confirmation message appears.

Order Sent
Congratulations! Welcome to WineShop At Home. Please check your email shortly for your Welcome Message.
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Search & Product Filtering Features
Search and Product Filtering Features

The search feature is available in many sections of the App.

On the Home screen, the keyword search will identify products as well as Resources or Videos that have that keyword in the name, i.e. Puerto Los Cabos.
Search and Product Filtering Features

Searching in the Products section will filter the items based on the keywords typed.

Tapping on the Menu icon in the top right corner will open up the filtering capabilities to display only the items selected in the Category i.e. Accessories, Gifts, Stemware, Vinotype, and Wine Club.
Searching in the Shopping Cart will bring up a new window with the search results.

Tapping on any item will automatically insert the item in the Shopping cart.
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IWC Order’s
To place orders for yourself, access “IWC Order” from the Menu bar as shown below.
Use the toggle switch to filter the wines by your Vinotype, or use the Product filter to narrow the list by keyword.

Continue with your selections and press Next when ready to move to the next step.

Your info will be automatically completed except for your Birth Date field which will be shown in Red.

After the Summary screen, you will proceed to the payment section and then order completion.
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Vinotype
Access the Vinotype application from a Shopping Cart or your IWC Order.
Vinotype

Follow through the next three screens to find your Vinotype.

MY VINO TYPE
I really LOVE
(Click all that apply)

Black coffee.
Period.

Salt.
LOTS of salt!

Coffee flavorings -
hazelnut; vanilla

Wine Education.
Just let me drink!

White, rose or
blush wine w/
steak

To be a wine
expert

Previous

MY VINO TYPE
I really HATE
(Click all that apply)

Coffee flavorings -
hazelnut; vanilla

Wine Education.
Just let me drink!

White, rose or
blush wine w/
steak

To be a wine
expert

Previous

MY VINO TYPE
I really WANT
(Click all that apply)

White, rose or
blush wine w/
steak

To be a wine
expert

Previous

MY VINO TYPE
YOU ARE A SENSITIVE VINO TYPE!

You are smack-dab in the center of the sensory sensitivity spectrum. This means you are a part of the largest segment, and are more apt to enjoy the widest range and diversity of wine styles.

You exhibit the highest degree of phenotypic plasticity, meaning you are flexible, adaptable, adventurous and a champion of 'context' for finding just the 'right' wine.
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Digital Library & Additional Features
The WSAH App provides access to three sections (News, Videos, Resources) where you can find information on the latest communications from WineShop At Home, as well as a digital library of videos and other resources to help you grow your business.

Some of these videos and resources may be shared with your prospects and customers.
Additional Features

- **Painter’s Palette** – mark up and comment on resources pages. Available for Catalogs and Resources only.
- **Add to Presentations** – create your own collection of resources and videos to present to your guests.
- **Thumbnail View** – faster navigation to your desired page on a Catalog or Resource.
- **Sharing Cart** – send content to your clients or prospects.
- **Favorites** – mark a page on the Catalog, Resource or Video as a Favorite for faster access.

The Catalog, Resources, and Videos have a Features menu accessible by tapping either on the Menu tab if visible, or anywhere on the document/video.
Tap on the Painter’s Palette icon to reveal a set of tools to mark up a Catalog or Resource page.
When finished, tap on the icon, or the icon and you’ll be prompted to save the edited image.

This action will store the new image in your Photo Album on your device.
Sharing Cart

Share your Videos and Resources with your customers and guest by tapping on the envelope icon wherever visible in the Features menu.

To remove items, tap on the x on the right of the item.

To continue navigating through the app, tap on “Add More”.

When ready to Share your Cart, tap on “Share Items” and fill out the information as prompted and tap on “Send”.

Additional Features
Thumbnail View

Catalogs and other Resources with multiple pages can be viewed in Thumbnail mode for faster navigation to a specific page.
To bookmark specific pages of a catalog for easier and faster access, tap on the star icon.

The next time you’ll open the catalog you will see the bookmarked pages on the left side of the first page.

To remove the bookmark, tap on the or tap on the star when viewing the specific page. The star will change colors from yellow back to white.
Creating a Presentation

Tap on the Presentation icon to assemble Resources and Videos and create your own Presentation. You can mix any type of available content.

You can add to an existing Presentation or create a new one.
Managing Presentations

Access your presentations from the appropriate section on your Home Menu.

The Date stamp is based on the date the presentation was created.

Remove any presentation by tapping on the Edit icon, then on the x icon of the presentation you wish to remove, and finally tapping the Done button.
Editing Presentations

Tap on the Edit icon to move around or completely delete any of the pages of your newly developed presentation.

Tap Done when finished.