

# Uncorkd Distributor Ordering Guide

This guide provides instructions and screenshots for a step-by-step guide on how to use the Uncorkd Distributor Ordering service. This document is organized to mirror the work flow of placing and receiving alcohol orders through Uncorkd.

## Setting Up Distributor Ordering

The first step for setting up seamless distributor purchasing with Uncorkd\* are the same steps for setting up your Inventory with Uncorkd. If you've set up inventory previously, then you may have already completed these steps.

You do not need to set up distributor information for each item if you do not plan to order it. When you decide to order an item, you can assign the necessary distributor information at the time of ordering.

To set up inventory/ordering, select a beverage from the Beverages screen found under Menu Management in the online menu management portal. Again, if you don't enter this information initially, you will be prompted to do so when placing an order for that item.

Click the Inventory tab on the Edit Beverage screen, and fill out the following information:

SKU	Item number to identify the product for ordering
Par	The quantity at which you want to re-order more of this product
Cost	Cost per unit (ie. bottle, can, keg) at which you buy the product
Size	The size of the unit (ie. 750ml, 1L, 12 oz.) that you buy from your distributor
Distributor	The vendor you buy the product from.

## Distributor Contact Information

To add distributor contact information, click the "Manage Distributors" link.

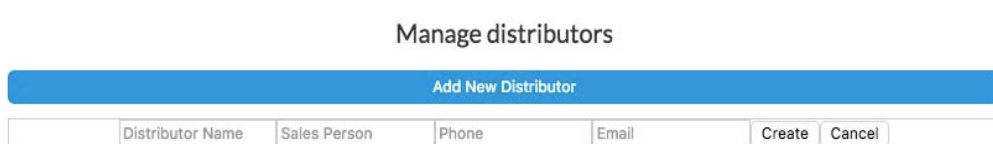
Click "Add New Distributor" and fill in the following fields:

Distributor Name, Sales Person (your sales rep), Phone and Email, and then click create.

You can create all distributors at one time, without assigning them to a specific item.



A screenshot of a web form for adding a distributor. The fields are: SKU (text input with value ABC123), Par (text input with value 6), Cost (text input with value 21.25), Size (text input with value 750 mL bottle), and Distributor (dropdown menu with value Southern Wine and Spirits and a Manage link).



A screenshot of the "Manage distributors" interface. It features a blue "Add New Distributor" button at the top. Below it is a table with columns: Distributor Name, Sales Person, Phone, Email, Create, and Cancel.

## Building an Order

To build an order from your menu items, start by selecting Order View from the Beverage Management Page. This will allow you to set Order Quantity for each item. You can see Item Pars, Inventory Counts (QTY), Last Order Date, and Last Order Quantity from this page.

As you continue to place orders through Uncorkd, you will build up a history of information that will become useful for making decisions about which items to keep in inventory, proper par levels, spend by distributor and more.

Bin	Beverage Name	Vintage	Distributor	Par	Qty	Last Order Date	Last Order Qty	Order Qty
14 Hands Chardonnay		2010	Southern Wine and Spirits	6	22	12/5/2017	1	+1
14 Hands Hot to Trot Red Blend		2010	Vintage Winebow	6	18	12/5/2017	6	+1
14 Hands Merlot Columbia Valley		2015	Vintage Winebow	8	11	12/5/2017	3	+1
A.P. Vin Rosella's Vineyard Pinot Noir		2009	Southern Wine and Spirits	4	6	12/1/2017	1	+1
Absolut Citron Vodka					3			2
Acacia Carneros Chardonnay		2008	Southern Wine and Spirits	6	11	12/1/2017	2	+1

## Filters

To add an item to your order, you can search for them individually with the quick search box or choose to filter which items populate on the page. There are multiple filter options from which you can choose.

**Filter By Type:** Wine, Beer, Spirits

**Filter By Status:** Active, Inactive, In Stock, Below Par, Out of Stock

Bin	Beverage Name	Vintage	Distributor	Par	Qty	Last Order Date	Last Order Qty	Order Qty
14 Hands Chardonnay		2010	Southern Wine		26	12/5/2017	1	2

## Order by Individual Unit or Case

When building your orders, you can choose to order by the individual unit (e.g., bottle, keg) or by the case. You choose unit or case with the icons to right of the Order QTY field. The icon that is highlighted in blue is the order size that is currently selected.

**The image of the bottle represents a single unit.**

**The image of the box represents a case.**

In the image above, the case icon is selected. That means 2 cases have been added to the order.

Once a value is entered into the Order QTY field, the item is added to your shopping cart.

Any action you take during the ordering process will be automatically saved to your shopping cart in Uncorkd. For example, when you set an Order Quantity or select Case or Unit, that action will be saved immediately. You will not need to manually confirm or save any action or edit. You will have a change to review your shopping cart though, and make any changes, before submitting an order.

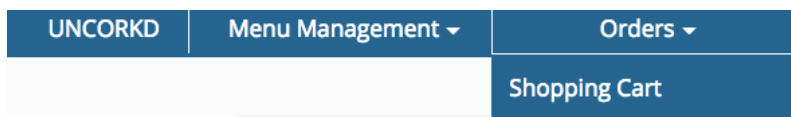
## Shopping Cart

Your shopping cart is where you can review all of the orders you've built, as well as make any necessary edits to the orders, including editing the ordering quantity, item size (e.g., 12oz can, 16oz can, bottle) and unit or case selection.

You can access the shopping cart by clicking the orange "Shopping Cart" button on the beverage management screen.



Or from the Uncorkd navigation menu, under "Orders"



## Organization

The shopping cart organizes your orders by distributor. This is why it is key to assign distributors for each item. Review your orders to make sure that each item is assigned to the correct distributor and distributor rep.

**Please Assign Distributors**

Item Name	Size	Order Qty	Unit/Case	Actions
Château Doisy Védrières Sauternes <small>Choose a Distributor...</small>	Select an Option	- 2 +	12 16	🔄 🗑️

**Southern Wine and Spirits** Sales Rep: Jessica Hill  Email order

Order Notes:

Item Name	Size	Order Qty	Unit/Case	Actions
Beringer "Knights Valley"	750 mL bottle	- 2 +	12 16	🔄 🗑️
Banfi Maschio Prosecco Brut DOC	750 mL bottle	- 3 +	12 16	🔄 🗑️
14 Hands Chardonnay	750 mL bottle	- 0 +	12 16	🔄 🗑️

**Wirtz Beverage** Sales Rep: Erica Bartello  Email order

Order Notes:

Item Name	Size	Order Qty	Unit/Case	Actions
Alkoomi Sparkling Shiraz	Select an Option	- 3 +	12 16	🔄 🗑️
Balvenie 15 yrs	1 L bottle	- 2 +	12 16	🔄 🗑️

## Items without a Distributor

If an item has no distributor assigned to it, then it will be listed under the **Please Assign Distributor** section at the top of the shopping cart. You can choose the distributor from the drop down menu placed below the item name, and it will automatically be relocated into the proper distributor section. If you have not created the distributor yet, click on the **Manage Distributors** link at the top of the page and then add the new distributor's information.

### Please Assign Distributors

Item Name	Size	Order Qty	Unit/Case	Actions
Château Doisy Vedrines Sauternes <a href="#">Choose a Distributor...</a>	Select an Option	- 2 +		

### Distributors without an email address

If a distributor does not have an email address entered for your sales rep, you will see a warning icon to the right of the distributor name. When you place orders they are emailed to your sales rep, so you need to enter in the email address for your sales rep by clicking on the **Manage Distributors** link at the top, enter in their email address and click the update button.

Manage Distributors

**Southern Glazers** Sales Rep: Jessica Hill   Email order

Order Notes:

Item Name	Size	Order Qty	Unit/Case	Actions
14 Hands Chardonnay	750 mL bottle	- 1 +		
A.P. Vin Rosella's Vineyard Pinot Noir	750 mL bottle	- 1 +		

### Size

If the size has never been specified for this item, as in the screenshot at the top of this page, select the correct size from the drop down menu in the size column. If you previously added a size when setting up your inventory/ordering, that size will be used here.

### Adjusting Order Quantity and Unit/Case

You can also adjust the Order Quantity from the shopping cart. Confirm that you've selected the correct option to order a single unit or case, change your selection if necessary.

### Saving Items for Future Order

If you would like to save an item for a future order, you can click the "Clock" icon under the "Actions" column. This will save the order in your shopping cart, but will not submit the item with the current order being placed.

When you are ready to add a saved item to a new order, click the blue "Shopping Cart" icon under the "Actions" column in the Saved for Later section.

Saved for Later

**Southern Wine and Spirits** Sales Rep: Jessica Hill

Item Name	Size	Order Qty	Unit/Case	Actions
Araujo Eisele Vineyard Cabernet Sauvignon	750 mL bottle	- 3 +		

### Email Order

The orders are sent to your sales reps via email. Confirm that the correct email address has been assigned for each sales rep. Next to the name of each sales rep, the Email Order check box will automatically be selected. You can deselect this box if you don't want to email this order, but still save it to your order history.

The email you use to login to Uncorkd will be the email address used to send and communicate orders to your distributor reps. Make sure you have access to this email, and that it is the email you wish to use for placing orders. If you do not have access to the email address or you share an Uncorkd login with someone else, please email us to get your own login at support@uncorkd.biz

## Order Notes

If you need to clarify an order with a note or comment for your distributor, you can type comments into the Order Notes text field listed under the distributor.

The screenshot shows the top navigation bar with 'Southern Wine and Spirits' on the left and 'Sales Rep: Jessica Hill' and a checked 'Email order' checkbox on the right. Below this is a red-bordered box containing the 'Order Notes:' label and a text input field with a small icon on the right side. Below the notes field is a table header with columns: 'Item Name', 'Size', 'Order Qty', 'Unit/Case', and 'Actions'.

## Place Orders

To submit orders to your sales reps, simply click on the Place Orders button at the top of your shopping cart. This will send an email of your order details to your sales rep. You will be copied on that email also.

## Shopping Cart

[Place Orders](#)

## Order History

After placing an order, you can review it in the "Order History" section found under "Orders" in the Uncorkd navigation menu.

This is a great tool for reviewing ordering habits and frequency, or to quickly see how much product you ordered for a past event.

The screenshot shows a navigation menu with 'UNCORKD' on the left. A dropdown menu is open under 'Menu Management', showing 'Orders' as the selected item. Below 'Orders' are two options: 'Shopping Cart' and 'Order History'.

## Sorting Orders

When you access the Order History page, you'll see that an order number has been assigned to each order entry. These numbers are for records within Uncorkd, not the invoice generated by your distributor. Each entry will have the date you placed the order, as well as the distributor you placed it with and status of the order.

## Order History

**Order Period**  to  **Filter by Distributor**  **Filter by Status**

Order #	Date	Distributor	Status
120487-7	01-30-2018	Vintage Winebow	Open
120486-7	01-30-2018	Southern Glazers	Open
120485-7	01-29-2018	Vintage Winebow	Closed
120484-7	01-24-2018	Reyes Beverage Group	Closed
120483-7	01-24-2018	Southern Glazers	Closed
120482-7	01-24-2018	Vintage Winebow	Closed
120481-7	01-24-2018	Southern Glazers	Closed

You can filter orders by

- **Date**
- **Distributor**
- **Status (Open or Closed)**

## Receiving Orders

When you receive delivery of an order, review it from the Order History page to confirm the proper order was received.

You can:

- **Check each item was delivered from the original order (and make changes if necessary)**
- **Add the unit price**
- **Add the invoice information**
- **Upload image(s) of your invoice**
- **Add any additional notes**
- 

[Return to Order History](#)

Order # **120509-7**  
Order Date: **01/06/2018**  
Distributor: **Southern Wine and Spirits**  
Sales Rep: **Jessica Hill (joshuaunders@hotmail.com)**

Invoice #:   
Invoice Date:   
Notes:

Invoice Uploads:

► Advanced Tools

Item Name	SKU	Size	Quantity	Units per Case	Unit Price	Total Price
<input type="checkbox"/> 14 Hands Chardonnay (2010)	ABC123	<input type="text" value="750 mL bottle"/>	<input type="text" value="1"/>	n/a	\$	\$0.00
<input type="checkbox"/> Courvoisier VSOP		<input type="text" value="1 L bottle"/>	<input type="text" value="0"/>	n/a	\$	\$0.00

Add additional item to this order

## Unit Price

The unit price refers to the individual unit cost at which you buy an item from your distributor. So for a case of wine, the unit price would be the individual cost of each bottle of wine in the case. By adding units per case, Uncorkd will automatically calculate the Total Price of the order for each item.

### There are two ways to add unit prices.

**Manual:** Confirm the price on the invoice and type it into the Unit Price field for each item.

**Upload Invoice:** Take a picture of the invoice on your phone, select the Upload Invoice option on the Confirm Delivery Received page, and select the appropriate invoice to upload. We cover uploading invoices below.

## Inventory Updates

After an order is received and you've verified the order was correct, click **Confirm Delivery Received** at the top of the page.

This will mark the order as Closed and add the items to your inventory. A closed order can be reopened if you need to edit it.

[← Return to Order History](#)

**Confirm Delivery Received** ✓

Delete 

PDF 






Order # **120509-7**

## Add Additional Items

If a product comes in your delivery that you did not order, but will keep (like a promotional bottle of whipped cream vodka) you can update the delivery to reflect the additional items with the drop down menu below the Add Additional Item column.

Only items that are currently listed on your beverages page will be able to be added. If the item you received is not order in the Uncorkd system, you will have to add from the Add New Beverages page on the beverage screen.

► Advanced Tools

Item Name	SKU	Size	Quantity	Units per Case	Unit Price	Total Price
<input type="checkbox"/> 14 Hands Chardonnay (2010)	ABC123	750 mL bottle	1  	n/a	\$ <input type="text"/>	\$0.00 
<input type="checkbox"/> Courvoisier VSOP		1 L bottle	0  	n/a	\$ <input type="text"/>	\$0.00 

Add additional item to this order

Select an Option

**+ Add Item to Order**

## Uploading Invoices

To upload your invoices to Uncorkd, you will simply take a clear photo of the invoice with your phone or another camera.

Here are the steps to upload invoices:

- Take a clear photo of the invoice
- Select "Upload Invoices" on the Confirm Delivery screen that is shown in the screenshot above.
- Select the correct image to upload

All of the ordering functionality described in this user guide works from mobile devices or iPads as well. For uploading invoices it is much easier to login to our website on your mobile phone than doing through your computer. On most phones when you tap the "Upload Invoices" button, it will give you the option to take a picture with your camera and then immediately upload that image.