

Guide to Setting Up the 1% “SBCWP” Fee in VinNOW

Note: VinNow doesn't currently have a built-in feature to automatically apply a separate percentage-based fee (like the 1% assessment) to all taxable sales without manual intervention.

This guide walks through configuring VinNOW to apply a 1% SBCWP fee to qualifying sales. The fee will be charged only on retail (Direct-to-Consumer) transactions and only when the customer's ship-to or sale location is in California, per Santa Barbara County Wine Preserve requirements. It will appear as a separate taxable line item on receipts and should be included in both in-person POS sales and online orders. Below are step-by-step instructions for setting this up in VinNOW's back-office (for the tasting room POS) and the VinNOW Web Cart (online store), along with important notes from VinNOW's documentation.

In-Person POS Setup (VinNOW Cashier System)

Step 1: Create a New “SBCWP 1% Fee” Product in VinNOW

1. **Open Product Maintenance:** In VinNOW Back Office, go to **Setup > VinNOW Files > Product Maintenance**. Click the **“New”** button to add a new product vinnow.com. This will open a blank product form where you can enter the fee details.
2. **Enter Product Details:** Assign a **Product ID** and **Description** for the fee. For example, you might use an ID like “SBCWP” (make sure it's unique and has no special characters vinnow.com) and a description such as “1% Santa Barbara Wine Preserve Fee”. Keep the description clear but short – you can use the “Register Description” field for a shorter label on receipts if needed (to avoid text wrapping on printed receipts) vinnow.com.
3. **Set Product Type to Non-Wine:** Choose **“Non-Wine”** as the product Type vinnow.com. This is appropriate for fees or charges (VinNOW treats wine club charges and tasting fees as Non-Wine products as well vinnow.com). This ensures wine-specific fields (like varietal, vintage) are not required.
4. **Assign a Category:** Select or create a Product Category for this fee (e.g. “Fees” or “Misc Charges”). Every product in VinNOW must belong to a category vinnow.com, though the category is mainly for organization and reporting (it won't affect the fee's behavior). You might use an existing “Tasting Fees” category or create a new “Fees” category.

Step 2: Configure the Fee Product's Tax and Pricing Settings

1. **Mark as Taxable:** Check the **“Taxable”** box for the SBCWP fee product vinnow.com. This ensures that standard sales tax will be calculated on this 1% fee line item, making the fee itself a taxable item (per California rules, since it's part of the sale). VinNOW will apply the appropriate sales tax based on the order's ship-to state to any product marked taxable vinnow.com. (Because the fee should only apply on California transactions, and California sales will already



trigger CA tax, marking it taxable means the fee will be taxed when it appears on CA sales.)

2. **Disable Discounts / Enable Price Override:** The fee should **not** be subject to any discounts (e.g. club member discounts). To enforce this, do not check “Discountable” for this product. Instead, enable “**Allow Clerk to Change Price**” vinnow.com. *VinNOW Note:* You cannot have both a discountable product and an overrideable price – it’s one or the other vinnow.com. By allowing price changes and leaving it non-discountable, you prevent any automatic discounts from reducing the fee vinnow.com. VinNOW’s documentation notes that the “Allow Clerk to Change Price” option is intended for open-ended charges like tips vinnow.com, which fits our use-case for an open percentage fee.
3. **No Inventory Tracking:** Check the option for “**No Inventory Tracking**” (if available on the product form). This prevents VinNOW from expecting a stock quantity for this item vinnow.com. Since the fee is not a physical product, you don’t want inventory counts or out-of-stock warnings associated with it. (VinNOW specifically recommends enabling “no inventory tracking” for Tasting Fee items to avoid zero-quantity warnings vinnow.com – the same applies here.)
4. **Set Retail Price:** Decide how you want to calculate the 1% in practice. You have two main options:
 - **Open Price Method (Recommended):** Set the **Retail Price to \$0.00**, and rely on the “Allow Clerk to Change Price” setting to enter the correct fee amount during each sale. If the retail price is zero (no base price), VinNOW will simply use whatever price the cashier enters as the line item price (with no “discount” annotation) vinnow.com. This method is straightforward – the cashier will manually input the 1% amount at checkout (e.g. enter \$0.50 on this item for a \$50 sale).
 - **Per-Unit Method:** Alternatively, you could set a small base price (e.g. \$0.01 per unit) and have staff adjust the **quantity** of this item to equal the dollar amount of the sale. For example, if a customer’s wine and merchandise total is \$50.00, the cashier would add the SBCWP product and set quantity to “50” ($50 \times \$0.01 = \0.50). However, this approach is more error-prone and less intuitive. Most wineries opt for the open price method above, treating the fee like an open-ended tip line.
Note: In either case, **label the fee clearly** so customers know what it is. For example, the receipt line might read “SBCWP 1% Fee – \$0.50”. This makes it obvious it’s a Santa Barbara County Wine Preserve fee, not an accidental charge or additional tax.
5. **Set Wholesale Price to \$0:** Since this fee must **not apply to wholesale customers**, configure any wholesale price fields for this product to zero. In Product Maintenance, you’ll see fields like “Wholesale A Price,” “Wholesale B Price,” etc. Enter **\$0.00** for each wholesale level vinnow.com. This way, if a staff member accidentally added the fee item to a wholesale order (or if a club member with wholesale pricing is processed), VinNOW would apply the wholesale price of \$0, effectively excluding the fee for that sale. VinNOW automatically uses a customer’s designated price level (retail vs Wholesale A/B/C) when adding



items to an invoice vinnow.com, so having a \$0 price on wholesale levels ensures the fee won't be charged to those customer types.

6. **Show on Cashier Screen:** Check **"Show Product on Cashier Screen"** for the fee item vinnow.com. This will list the SBCWP fee as a button or item in the POS interface, making it easy for cashiers to find and add. (If you prefer not to clutter the menu, you can leave it unchecked and have staff add it by typing the product ID, but having it visible is helpful as a reminder.)
7. **Save the Product:** Click **Add/Save** to save this new fee product in VinNOW. The SBCWP fee is now set up as a product in your system.

Step 3: Implementing the Fee at Checkout (POS Usage)

Once the fee product is created and configured as above, your tasting room staff will need to add it to the appropriate transactions. Here's how to ensure it's applied under the right conditions:

- **Apply to Retail California Sales Only:** Train staff that whenever they ring up a **retail** sale that will be consumed or shipped **within California**, they must add the "SBCWP 1% Fee" line item. In practice, this means:
 - **Tasting Room/In-Person Sales:** Virtually all in-person sales at your Santa Barbara County winery qualify (since the sale takes place in CA). Before completing a sale, add the SBCWP fee product to the ticket and enter 1% of the pre-tax merchandise total as the price. For example, if the customer's subtotal for wine, merchandise, etc. is \$100.00, click the SBCWP Fee item and input **\$1.00**.
 - **Shipping Orders (Phone/Walk-in orders):** If a customer is having their purchase shipped, check the **ship-to state** on the order. VinNOW will have already determined the tax based on that state vinnow.com. If the ship-to is **California**, add the 1% fee as above. If the ship-to is outside CA, **do not** add the fee (the sale is not within CA, so it's exempt from this fee).
- **Do NOT Apply to Wholesale or Exempt Sales:** If the order is wholesale (e.g. a restaurant or retailer buying wine at a wholesale rate), or otherwise not subject to CA sales tax, do not add the fee. Using customer types and the pricing setup from Step 2 will generally prevent the fee from being used in wholesale scenarios, but it's good to be aware. (If you accidentally add it and the customer is wholesale, the fee will ring up as \$0.00 due to the wholesale price setting vinnow.com.)
- **Verify on Receipt:** The SBCWP fee should print as its own line item on the receipt, with whatever description you entered (e.g. "SBCWP 1% Fee") and the dollar amount. It will also have sales tax applied just like any other taxable item – meaning on a printed receipt, it might show up in the taxed subtotal and contribute to the total sales tax line. This matches the requirement that the fee be a taxable line item vinnow.com. Double-check a test receipt to ensure the formatting is clear and the fee is correctly labeled.
- **Staff Tip:** It may help to post a reminder at the register or enable a prompt in your workflow to not forget the fee for CA customers. Since VinNOW doesn't automatically add the fee line by itself, the onus is on the cashier to include it. Consider enabling the "Daily Business Summary" report to review



that all CA sales have the fee. (Tasting fee products, for example, show up in that report vinnow.com – you might categorize this fee similarly for tracking.)

Online Ordering Setup (VinNOW Web Cart)

If you use VinNOW's integrated web shopping cart for online orders, you'll need to configure the fee on that platform as well so that online customers with California orders are charged the 1% fee. The general approach is to publish the SBCWP fee product to your web cart and then make sure it gets applied to the right orders.

Step 1: Enable the Fee Product on the VinNOW Web Cart

1. **Web Info for Product:** In VinNOW Back Office, open the **Product Maintenance** screen for the "SBCWP 1% Fee" product you created. Navigate to the "**Web Info**" tab for that product (this tab is available if your VinNOW Web Cart integration is active).
2. **Show on Web Cart:** Check the box labeled "**Show this product on web shopping cart**" vinnow.com. This flags the fee item so that it will be included in the set of products uploaded to your online store. (VinNOW's cart only lists items you explicitly mark for web availability.)
3. **Web Category:** Select an appropriate **Web Category** for this item vinnow.com. You might create or use a category like "Fees" or assign it to an existing miscellaneous category. If you prefer the fee not to be browsable by customers, you can assign it to a less prominent category – however, it generally will not be something customers actively purchase on their own, so category is not critical except to satisfy the system's requirement.
4. **Web Pricing:** Enter the **Web Sale Price** for this product vinnow.com. Ideally, this should mirror how you set it up for POS: if you left the price open (0.00) in the POS, enter "0.00" as the web price as well. If you used the \$0.01-per-unit method, enter \$0.01 here. **Important:** VinNOW documentation advises that the web price should match the in-store price for consistency vinnow.com. (If the web price is lower than the normal price, the cart will treat it as a "sale" price and highlight it vinnow.com – not applicable for our fee, so just keep it the same.)
5. **Inventory Settings:** Since this fee product has no inventory, you don't need to set web inventory levels. If VinNOW requires values, you can leave the default or set high values so it's never marked "out of stock". Ensure "**Inventory Tracking**" is unchecked on the web settings as well, if applicable (similar to the POS setup).
6. **Save Web Info:** Click "**Update**" (or Save) on the Web Info tab to save these settings for the product vinnow.com.

Step 2: Publish/Synchronize the Fee to the Online Store

1. **Upload to Web Cart:** Go to **Setup > System Options > System Option Settings > Integrated Web Shopping Cart** (in VinNOW back office). In the Web Cart settings, use the **Initialization/Synchronization** options to push product updates to your live cart. Check "**Upload all products currently set**



to show on web” and then click the **Update** button vinnow.com. This will send the new fee product (and any other marked products) up to the VinNOW web cart.

- *Note:* If you have the web cart already running, you might have an option to **“Synchronize Products”** under Utilities or a similar menu. Ensure this fee item gets uploaded so it exists on the website. VinNOW confirms that any product marked to show on web will *automatically* be added to the cart database vinnow.com once uploaded.
2. **Verify on Website:** After uploading, use the **“View Shopping Cart”** preview feature or your live website to verify the product appears (if it’s visible) or at least that it’s now part of the cart’s product list. You likely do not want customers manually adding this fee, so it may not be displayed prominently on the storefront. The main purpose of uploading it is to allow the system to charge it when needed. (You can test by attempting to checkout with a CA address, as described below.)
 3. **Wine Club/Member Sync (if applicable):** This step isn’t directly about the fee, but ensure you’ve synchronized any customer data needed (Utilities > Web Shopping Cart > Synchronize customers, etc.) so that the web cart knows who is a club member for discounts. This ensures that club discounts apply to products **but not to the fee** (since we made the fee non-discountable, the discount shouldn’t affect it on the cart either).

Step 3: Ensuring the Fee is Applied to Online Orders

This part is critical: how do we make sure the 1% fee actually gets added for California online orders? Unlike the POS, the web cart doesn’t have a cashier to manually add the fee, so you need a strategy to include it. As of now, VinNOW’s out-of-the-box web cart **does not have an automatic surcharge feature tied to the ship-to state** (there is no native setting to “always add X% for CA orders”). Here is a workaround to meet the requirement:

- **Manual Addition in Back-Office:** With this approach, you allow online orders to come through normally, **then manually add the SBCWP fee in VinNOW before finalizing the order**. For instance, when an order is placed on the web cart, it will appear in VinNOW (either as an auto-invoiced sale or in an order queue). For any order shipping to a California address, edit that order in the VinNOW back office: add the “SBCWP 1% Fee” product line and enter the 1% amount (just as you would in the tasting room), then complete payment capture. This ensures the customer is charged the fee. The downside is it’s not charged at the moment of online checkout – you’d either charge the card for the extra amount after the fact or authorize the order with an adjusted total. If you choose this method, it’s wise to **inform customers at checkout** (e.g., in the cart’s Warning/Order Completed text) that “A 1% Santa Barbara County Wine Preserve fee will be added for CA orders” so they aren’t surprised. Also, coordinate with your payment processing so that either the initial authorization includes a buffer or you perform a capture for the higher total once the fee is added.

Important: At the time of writing, there is no one-click setting in VinNOW’s Web Cart admin to “add surcharge X for CA.” It will likely require the above solution. Many wineries opt for the manual back-office addition initially, then work with their POS provider for a more automated fix. **Be sure to test your chosen method**



before going live: e.g., place a test web order with a California shipping address and verify that the final invoice in VinNOW includes the 1% fee line correctly.

Consult VinNOW Support if Needed: Implementing a new fee that behaves like a tax is a unique scenario. Don't hesitate to reach out to VinNOW's support team for help. They can confirm if newer versions of the software have added a direct feature for the Wine Preserve fee or suggest the best workaround. VinNOW's documentation and support

Required Disclosure – If the assessment is passed on to customers, it must be disclosed in advance. The disclosure can be placed:

- On a sign or placard in the tasting room
- On tasting room menus, event flyers, and restaurant menus (if applicable)
- In the footer of your website or in the checkout/cart
- On receipts, even if the customer declines the receipt
- In wine club emails

Sample Disclosures

- If the fee is passed on:
"All retail sales subject to a 1% Santa Barbara County Wine Preserve fee."
- If the fee is included in the retail price:
"All retail sales include a 1% Santa Barbara County Wine Preserve fee."

Clarify on Receipts – Ensure that receipts display the BID fee as a separate line item with clear wording if passed on to the consumer.

By following these steps, your winery can effectively implement a 1% "SBCWP" fee on all retail sales in California, ensuring the fee is taxed appropriately and operations remain compliant with state regulations.

We encourage you to contact VinNOW support and request automating this process.

Draft Email to VinNOW Support: help@vinnow.com

Subject: Assistance with Automating the SBCWP Fee Calculation

Dear VinNOW Support Team,

I am reaching out to inquire about configuring our VinNOW POS system to apply a **1% assessment fee called SBCWP (Santa Barbara County Wine Preserve)** to all taxable retail sales made in California.



Currently, we are manually adding this fee as a non-inventory product during each transaction. However, we would like to know if there is a way to **automate this calculation and application process** so the fee is automatically added to all applicable sales (in-person and shipped orders within California).

If no direct automation is available, could you please confirm if there are any workarounds or customization options that could streamline this process? Also, if this feature is something you may be able to implement, we would appreciate any guidance or recommendations.

Thank you in advance for your assistance!



SANTA BARBARA
V I N T N E R S