



Make it simple to manage corporate gifts and bulk client orders through your OrderPort platform. Follow these steps to set up, process, and fulfill gifts efficiently for business accounts.

Step 1: Enable Purchase Orders for Corporate Gifts

- [Payment Processing Setup](#) →
- Allow Purchase Orders (P.O.s) as a payment method for corporate gifting and gift memberships.
- This makes it easy for business customers to submit bulk orders and pay via invoice.

Step 2: Create a Business Customer Account

- [Customer Setup](#) →
- Add a new customer profile for the corporate client.
- (Optional) Create a Customer Class named Corporate Gifting to simplify reporting and tracking for these accounts.

Step 3: Add Recipient Accounts

- For each recipient, create an individual customer record including:
 - Email Address
 - First Name & Last Name
 - Shipping Address
- 💡 Tip: If you have 20+ recipients, contact a customer support representative (helpdesk@orderport.net) for assistance in uploading recipient information. Attn Nathan Davis, Lailand Flaherty, & Laura Marquez

Step 4: Create On-Demand Gift Products

- [Create a Product](#) →
- Set the product type to OnDemand, customer product category - 'Corporate Gifting'
- You can structure your gifting products in one of two ways:
 - Option 1: Separate products for the item cost and the shipping fee.
 - Option 2: One combined product with both costs included.
- This flexibility lets you control pricing and fulfillment based on your program design.



206-464-1151



www.orderport.net



onboarding@orderport.net

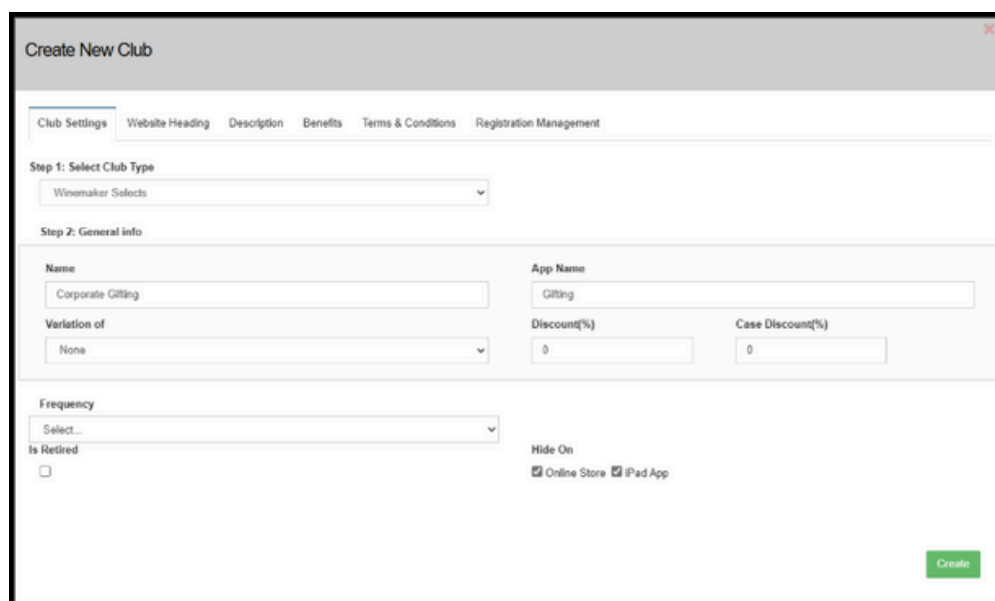
Step 5: Create the Corporate Order for Billing

Use the Admin Cart →

- Open the Admin Cart and create an order for the Business Customer Account.
- Add the On-Demand Gift Product(s).
- Adjust the quantity to match the total number of gift recipients.
- Choose a payment method — ACH, Credit Card, or P.O.
- This completes the transaction while keeping your records clean and organized.
- 💡 Tip – You can create an invoice and charge as a P.O. so they can review the total prior to completing the transaction.
- 💡 Tip – You can use a CC convenience fee to offset cc charges or ACH for a low % option

Step 6: Set Up a Corporate Gifting “Club”

- Create a Club →
- Create a Winemaker Selects Wine Club specifically for gifting.
- Set discounts to 0% for products and cases
- Hide the club on both your Webstore and POS.
- Under Gift Member Options, select:
- Use Releases: ✓
- 1 Release
- This setup allows you to manage all gift shipments as one coordinated release event.



The screenshot shows the 'Create New Club' form with the following fields and options:

- Club Settings** (selected tab): Website Heading, Description, Benefits, Terms & Conditions, Registration Management
- Step 1: Select Club Type**: Winemaker Selects (dropdown)
- Step 2: General info**:
 - Name**: Corporate Gifting
 - App Name**: Gifting
 - Variation of**: None (dropdown)
 - Discount(%)**: 0 (input field)
 - Case Discount(%)**: 0 (input field)
 - Frequency**: Select... (dropdown)
 - Is Retired**: ☐
 - Hide On**: ☒ Online Store ☒ iPad App
- Create** (green button)



Step 7: Add Gift Recipients to the Club

- Navigate to Club > Members.
- Add each recipient as a Gifted Membership, using the Business Account as the gifter.
- Select P.O. as the payment method.
- Repeat for all recipients.

Step 8: Conduct the Release

- Manage Releases →
- Run a club release with:
 - 100% product or collection discount
 - \$0 flat-rate shipping
- Fulfill the orders just like a standard wine club release — the system will automatically handle each recipient's shipment.

✓ You're all set!

Your corporate gifting program is now streamlined through OrderPort — allowing you to easily manage bulk gifts, track shipments, and delight business clients with personalized experiences.

Helpful Tips

- Suppress or customize the Gift Club Notifications in the Marketing Module:
 - Wine Club Gift Membership Welcome
 - Gift Membership Expiration
 - Thank You For Gift Order Email
- Customization Recommended
- Create a "Corporate Gifting" Product Category in the catalog manager for easy granular reporting.
- Use collections for gifting items so there is one item to discount, and you can set a custom product category.
- Only run 1 corporate gift through the same club at a time and **always** double check your recipients in the build to ensure no one from prior gifts is added.
- **Complete the Release once you have processed.**
- More often than not, the gifter will want a copy of all the tracking numbers and orders. You can do this by running a report. We suggest building one in My Reports!
- These customers have not opted in for email marketing, and corporations are very particular about marketing to their lists. Make sure they opted out, and your marketing team does not auto opt them in.
- This is a great opportunity to add a QR code to 'stay connected' in with the shipments

