



# Top Winery Software Integrations Checklist

## 1. POS + CRM

Your POS is the hub of tasting room transactions. But without integration into your CRM, valuable customer insights are lost. Every purchase, tasting flight, or special order should automatically update customer profiles.

This allows wineries to:

- Track lifetime value and purchase history.
- Segment customers for marketing campaigns.
- Personalize follow-up offers after visits.

**Checklist Question: Does our POS automatically sync purchases into CRM records in real time?**

## 2. Wine Club Management + eCommerce

Wine clubs are the lifeblood of winery revenue, often generating 40% or more of annual sales. But today's club members expect digital convenience. They want to modify shipments, add bottles, or pause deliveries online.

When wine club and eCommerce systems are integrated:

- Members manage accounts seamlessly from any device.
- Inventory updates automatically across channels.
- Staff can track club performance in real time.

**Checklist Question: Can members update their club orders online, and do those changes sync instantly with tasting room systems?**

## 3. Reservations + POS

Tasting rooms drive both revenue and new club signups. Integrating reservations with POS gives staff a complete picture of each guest before they arrive, from past visits to preferred varietals.

Benefits include:

- Personalized tasting experiences that increase conversions.
- Streamlined check-ins and faster service.
- Automatic follow-up campaigns based on visit data.

**Checklist Question: Does our reservation system give tasting room staff customer insights before guests arrive?**

## 4. Loyalty Programs + CRM

Loyalty programs only succeed when they're connected to customer data. By integrating with your CRM:

- Rewards trigger automatically based on purchases.
- Offers are personalized to customer preferences.
- Clubs retain members longer through targeted perks.

**Checklist Question: Do loyalty rewards update in real time with customer purchase behavior?**

## 5. Payment Processing + Analytics

Payments data is often underutilized. By connecting payments and analytics, wineries can:

- Monitor revenue in real time across all sales channels.
- Identify seasonal sales patterns.
- Detect opportunities to increase average order value.

For OrderPort customers, integrated payments have become a significant growth driver, with payments revenue expanding over 30% annually in recent years

**Checklist Question: Can we view payments data and revenue performance in one dashboard across tasting rooms, clubs, and online?**

## 6. Compliance + Shipping

Shipping wine across state lines is complex. Integrated compliance and shipping systems prevent errors and protect revenue by:

- Blocking restricted orders automatically.
- Calculating state-specific taxes.
- Ensuring age verification requirements are met.

**Checklist Question: Is compliance automation integrated into our eCommerce checkout process?**