



Winery Software Buyer's Checklist

The Essential Questions to Ask Before Choosing a
Winery Software Platform

Customer Data & Information Management

Don't compare software by price alone. The right platform should support your winery today and scale with your business for years to come. Use this checklist to compare every solution you're considering.

Business Fit

- Was the platform built specifically for wineries?
- Can it support my business as we grow?
- Is it designed for wineries with multiple tasting rooms or locations?
- Does it support both wine clubs and ecommerce from one customer record?
- Will it reduce manual work for my staff?

Customer Experience

- Can guests shop online, visit the tasting room, and join the wine club through one connected system?
- Does it maintain a single customer profile across every interaction?
- Can I recognize club members before they arrive?
- Does it support personalized experiences and customer preferences?
- Can customers easily manage their memberships online?

Commerce & Operations

Does the platform include...

- Ecommerce
- Point of Sale
- Wine Club Management
- Reservations
- CRM
- Marketing Automation
- Gift Cards
- Reporting & Analytics
- Payment Processing
- Shipping & Fulfillment Tools

Ease of Use

- Is the platform intuitive enough for seasonal staff?
- Can employees learn it quickly?
- Are updates included without additional fees?
- Does it reduce duplicate data entry?
- Does it eliminate the need to switch between multiple systems?

Support

- Is live support included?
- Is onboarding included?
- Will someone help migrate my customer data?
- Does the provider understand winery operations?
- Can I easily reach a knowledgeable support team?

Reporting & Insights

- Can I view sales across all channels?
- Are customer reports included?
- Can I track club performance?
- Can I measure marketing effectiveness?
- Are reports available without additional costs?

Pricing

Don't stop at the monthly subscription.

Ask these questions:

- Are there percentage-of-sales fees?
- Are there additional fees for ecommerce?
- Are there extra charges for reservations?
- Are marketing tools included?
- Are reporting tools included?
- Are implementation fees required?
- Are integrations an additional cost?
- Will my software costs increase as my sales grow?

Future Growth

- Can the platform scale with my winery?
- Will I need additional software in the future?
- Does it continue to add new features?
- Does the roadmap align with where the wine industry is headed?

Before You Decide

The lowest monthly price doesn't always translate to the lowest total cost.

As your winery grows, multiple systems, disconnected customer data, manual processes, integrations, and percentage-based pricing can quickly become more expensive than investing in one connected platform.

The best software isn't simply the least expensive. It's the one that helps your team work more efficiently, creates better guest experiences, and supports long-term growth.

Build a Better Winery. Spend Less Time Managing Software.

Discover how one connected platform can reduce complexity, eliminate percentage-of-sales fees, and help your winery grow with confidence.

→ **Schedule a Personalized Demo**
and find out how much you can save
and grow with OrderPort.

