

# WINE SOFTWARE CHECKLIST

## SELECTION CRITERIA

*This checklist helps you identify and work through the selection criteria that are important for your business objectives, so you can shortlist and book demos with confidence.*

### 1. Define your Needs and Goals

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- Identify the problem:**  
What specific challenges or gaps does the software need to solve?
- Set objectives:**  
What are the goals you want to achieve with the SaaS? (e.g. improve efficiency, open up new sales channels, reduce costs, enhance collaboration, etc.)
- Application solution scope of requirements:**  
Consequently, what business use cases will the software need to support?
- Team requirements:**  
Which departments or team members will primarily use the software and what are their specific pain points?

### 2. Research & Compare Providers

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- Market research:**  
Make a list of potential software solutions.
- Features Comparison:**  
Compare key features of each solution.
- User Reviews:**  
Understand user experiences.
- Competitor Analysis:**  
Are your competitors using any of these tools? Why or why not?

### 3. Evaluate Features & Functionality

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- Core Features:**  
Does the software offer the essential functionalities you need?
- Integration Capabilities:**  
Can it integrate with existing or best-in-class tools and platforms (e.g. accounting, CRM)?
- Mobile Accessibility:**  
Does the solution offer on-the-go, remote access?

- Storage Integration:**  
How does the software integrate with wine storage operators?

*\*Refer to our [Software Functionality Index](#) at the bottom of this checklist for a granular list of potential activities and features relevant to your business.*

## 4. Check Security & Compliance

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- Data Encryption:**  
What type of encryption does the provider use?
- Testing:**  
Does the vendor undertake regular penetration testing?
- Data Backup:**  
How often does the provider back up your data?
- User Authentication:**  
Does the software support multi-factor authentication (MFA)?

## 5. Pricing & Total Cost of Ownership

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- Subscription Costs:**  
Understand the pricing structure (monthly/annual plans, per-user pricing, etc.).
- Additional Costs:**  
Scope out non-recurring costs (e.g. implementation, training, customisation).
- Value for Money:**  
Consider the value the software brings relative to its cost, taking into account hosting, roadmap regularity of enhancements and updates, pre-loaded data, industry-specific integrations.
- Saving Costs:**  
How does the software help reduce costs for your wine business, like consolidating shipments, boosting efficiency etc?
- Return on Investment (ROI):**  
Do the numbers add up regarding what the new software will enable you to do (new activities / saved costs)?

*\*Refer to our article [Calculate the ROI on your new wine software](#), where you can work through practical scenarios to estimate costs and return on investment.*

## 6. Test Usability

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- Ease of Use:**  
Is the user interface intuitive and easy to navigate?
- Onboarding Process:**  
Is the onboarding process simple for new users?

- Support Resources:**  
Are there training resources, tutorials, or user guides available?
- Customer Support Quality:**  
What support options are available? Are they responsive?

## 7. Service Level Agreements (SLA)

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- Uptime Guarantee:**  
What uptime percentage does the provider promise (e.g. 99.9%)?
- Response Times:**  
How quickly does the provider commit to resolving issues?
- Data Ownership:**  
Clarify who owns the data you store on their platform.
- Exit Strategy:**  
If you need to switch providers, how easy is it to export your data?

## 8. Vendor Reputation & Trustworthiness

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- Company History:**  
How long has the provider been in business?
- Financial Stability:**  
Is the company stable, and what are its growth prospects?
- Customer Base:**  
Do they have reputable clients or companies similar to yours?
- Community & User Groups:**  
Is there a community of users that can help answer questions or share experiences?

## 9. Implementation & Adoption

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- Setup Time:**  
How long does it take to fully implement the software?
- Data Migration:**  
Is there support for data migration from your existing systems?
- Adoption Strategy:**  
How easy is it for your team to adopt the new software?
- Change Management:**  
Consider how the introduction of the software will impact existing workflows and processes, and consider whether the software will help you adopt industry best practise.

- Customer Experience:**  
How does the software deliver improved customer service for your wine business?

## 10. Long-term Support & Roadmap

- Product Roadmap:**  
Is the software provider actively developing new features?
- Updates & Upgrades:**  
How often does the provider release updates or new versions?
- Support for Scaling:**  
Can the solution grow with your business needs in the long run?
- Customer Success Management:**  
Does the provider offer dedicated support for helping you succeed with their product?



Plus if you are unfamiliar with software acronyms and jargon, remember to grab our **FREE SOFTWARE GLOSSARY** accessible via the main guide.

### What's next?



Use our guide and this audit checklist to help you create your short list, then book in demos.

As soon as you start seeing a system in action, meeting the people behind the software and asking questions, you will start to feel confident in what could work to help you achieve your business goals.

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 [Demo or chat?](#)

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## Software functionality index

When comparing the features and functionality of a solutions provider, here is a laundry list of features that might be relevant to your wine business.

- Basic inventory management
- Inventory management for en primeur
- Manage third-party inventories
- Inventory management for virtual stock
- Wine referential database (how big, how accurate)
- Client stored wines
- Client stored wines - billing calculation and reserves report
- Advanced client reserve management (PCRM)
- Accounting software API (Xero / Quickbook / Pennylane)
- Accounting as own solution
- Calculates duty status
- Multi-jurisdictional tax
- Liv-ex integration
- Vivino integration
- API with Lightspeed X POS
- POS (ePOS)
- CRM integration (Hubspot, P2 etc)
- API for 3rd party business applications, ie shipping services
- eCommerce
- eCommerce with self-directed brokerage
- API integration layer for existing WooCommerce
- Shopify integration
- Warehouse API with LCB
- Warehouse API with Octavian
- Warehouse API with EHD
- Producer information
- Order and invoice templates
- Handle multi-currency
- Consolidate shipments
- Workflows for EP
- Sales Order Processing workflow management
- Purchase Order Processing workflow management
- Unlimited email templates
- Document management / storage
- Document output (automatic distribution)
- Shipping & Transfers
- Multiple storage locations
- Customer Information Management
- Customer Communication workflow management
- Market pricing
- Pricing groups (for importers and Ontrade sales )
- Pricing flexibility (structure)
- Variable wine pricing per sales channel
- Incoterms
- Commodity codes (for importers)
- High volume goods in / out workflow
- VAT Margin scheme
- Pricing groups
- Invoices