

**Heartland**

Cash  
**Register**  
Express

ShipCompliant Setup and Use Guide

Rev 03/2020

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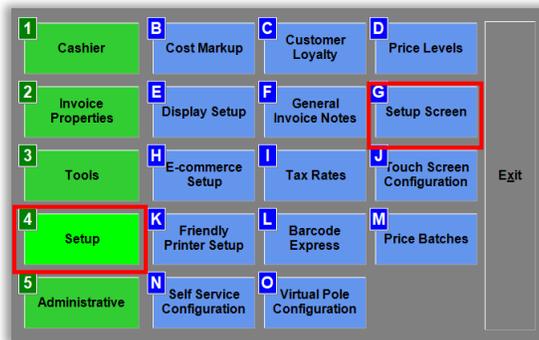
<b>Date</b>	<b>Doc Version</b>	<b>Author</b>	<b>Summary</b>
03/26/2020	1.0	BG	New process, updated format

## Overview

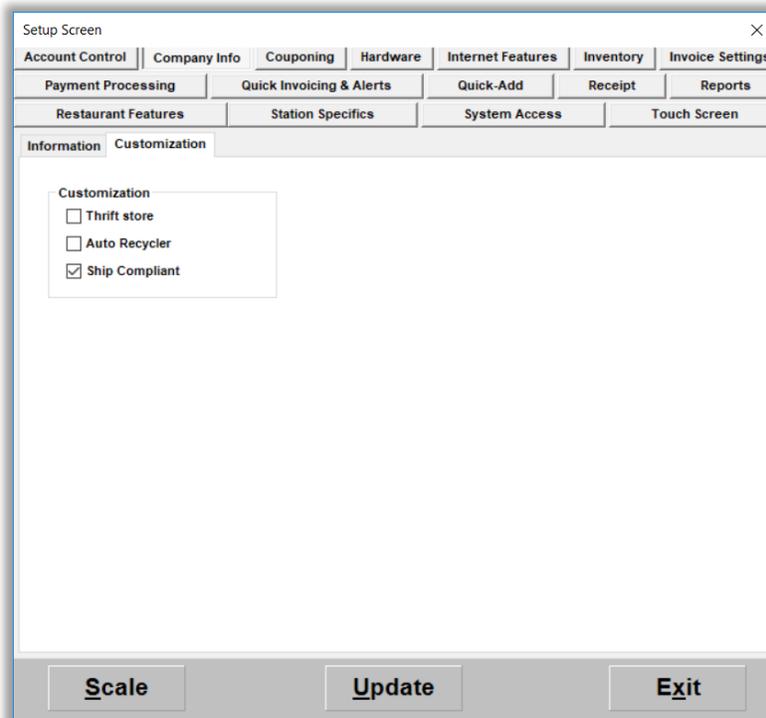
The ShipCompliant customization connects to the ShipCompliant.com web service, which performs legal checks, allowing stores to ship wine and spirits to their customers in compliance with state regulations. This service integrates with CRE to run a check for shipping compliance for each transaction.

## CRE Setup Screen

- 1 In CRE, select **Manager** or **Options**, and enter credentials if prompted.
- 2 Select **Setup**, then **Setup Screen**.

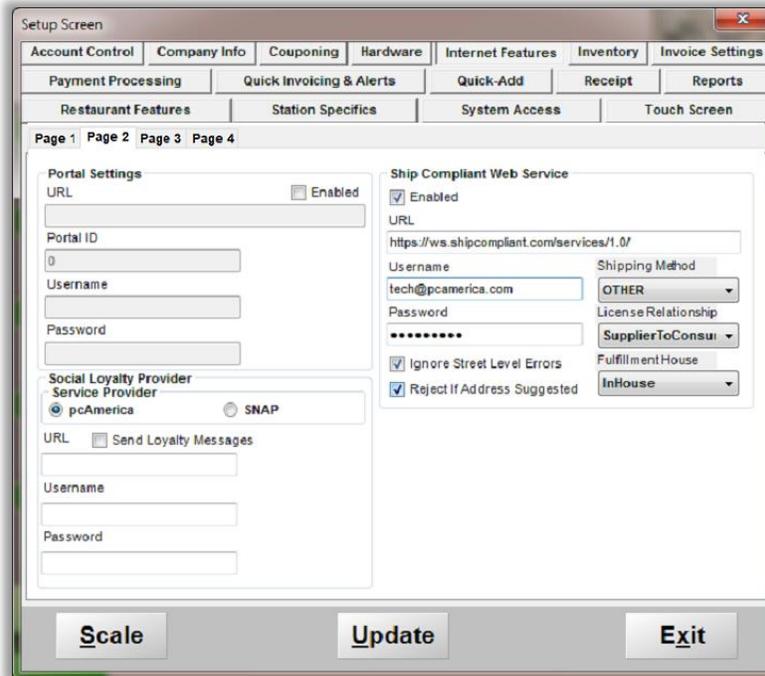


- 3 Go to the **Company Info** tab, and then the **Customization** tab.



- 4 Check the **Ship Compliant** box and click **Update**.

- 5 Still in the **Setup Screen**, go to the **Internet Features** tab, then select **Page 2**.



- 6 Check the **Enabled** box, and enter **URL**, **Username**, and **Password**.
- 7 Check boxes as appropriate for **Ignore Street Level Errors** and **Reject If Address Suggested**.
- 8 Select from list for **Shipping Method**, **License Relationship**, and **Fulfillment House**.
- 9 Select **Update** to save your changes.

## CRE Department Setup

- 1 In CRE, select **Manager** or **Options**, and enter credentials if prompted.
- 2 Select **Administrative**, then **Department Maintenance**.



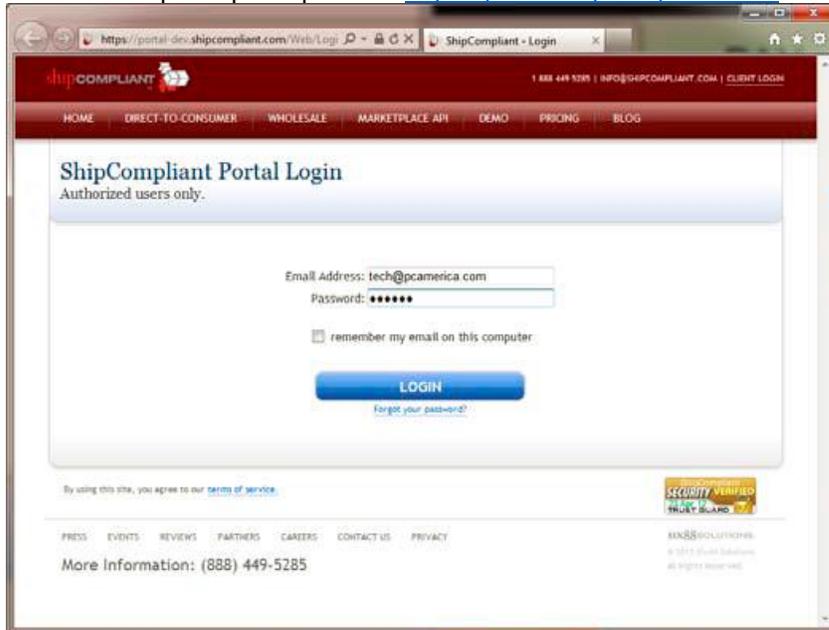
**3 Select Add Department.**

**4 Enter Department ID and Department Description (both of these are required), then select Save.**

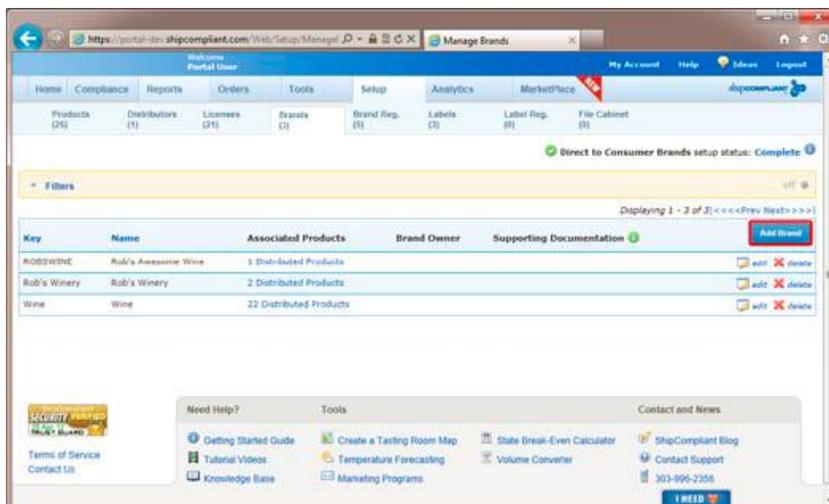
**5 Repeat as necessary and, when finished, click the X in the upper right corner to exit.**

## ShipCompliant Brand Setup

- 1 Go to the ShipCompliant portal at <https://portal.shipcompliant.com>.



- 2 Enter your ShipCompliant **Username** and **Password**, and click **LOGIN**.
- 3 Go to the **Setup** tab and then select the **Brands** sub-tab.
- 4 Select **Add Brand**.
- 5 Enter the **Brand Key** and **Brand Name**



**Please note:** Brand Key here corresponds to Department ID in CRE, and Brand Name corresponds to Department Description.

- 6 In the **Additional Brand Details** section, make appropriate selections for the following:
  - ▶ Brand Producer – the company that makes the brand you are configuring
  - ▶ Brand Bottler – the company that bottles the brand you are configuring
  - ▶ Trade Name – the company name under which the brand you are configuring operates

**Add/Edit Brand**

Basic Supporting Documents

Edit Basic Information about this Brand.

Supplier: Test Account

Brand Key: PCAWINE

Brand Name: PCAWINE

Brand Owner:

- This brand is owned by Test Account.
- This brand has always been owned by Test Account.
- This brand was acquired from a third party.
- Other

**Additional Brand Details**

Brand Producer

- This brand is produced by Test Account.
- This brand is produced by a third party.

Brand Bottler

- This brand is bottled by Test Account.
- This brand is bottled by a third party.

[No document required.](#)

Trade Name

- This brand operates under Test Account.
- This brand operates under a trade name owned by Test Account.

[No document required.](#)

Save or Cancel

**Please note:** These selections may require additional documents. If so, you can configure these through the ShipCompliant portal.

- 7 Select **Save** when finished.
- 8 Repeat as necessary until you have created all configured CRE departments.
- 9 When finished, click **Exit**.

## Inventory Maintenance – Item Setup

- 1 In CRE, select **Manager** or **Options**, and enter credentials if prompted.
- 2 Select **Administrative**, then **Inventory Maintenance**.



- 3 Click **Add** to add items to your designated departments.
- 4 Select the desired department from the **Department for this item** list.

Inventory Maintenance

**Item: Cabernet** Print Labels Keyboard

Department for this Item: **PCAWINE** Avg Cost: **\$6.00000**  Tax  
 Item Number: **Cabernet** Price You Charge: **\$21.99**  Tax 2  
 Description: **Cabernet** Price with tax: **\$24.19**  Tax 3  
 # In Stock: **500**  Bar Tax

Click to Select Picture

Optional Info Pending Orders Properties Notes Modifiers Price Levels  
 Ordering Info Special Pricing Matrix Sales History Recipe Printers

Options Additional Info

Bonus Points **0** # Barcodes **0** Alternate SKUs  Tag Along Items   
 Commission % of Gross Profit **0.0%**

**Product Type** Wine  Modifier Item  Disable this Item  Foodstampable  
 Alcohol Content **15**  Exclude from Account Limit  Prompt Quantity  Auto-Weigh  
 Location  Check ID Before Selling  Prompt Price  Use Serial/Batch #  
**Unit Size** **750** **Unit Type** **Milliliter**  Check ID #2 Before Selling  Allow Buyback  Special Permission  
 Count This Item  Print on Receipt

Search by Item Number Profit% 266.5 % Retail Discount 0 % Gross Margin 72.715 %

**Add** **Save** **Transfer** **Instant PO**  
**Previous** **Look up** **Next** **Help** **Duplicate** **Delete** **Exit**

- 5 Be sure to complete the following required fields, either by making a selection from the list provided, or by entering a value.
  - ▶ Product Type
  - ▶ Alcohol Content
  - ▶ Unit Size
- 6 Select **Save**.
- 7 Repeat as necessary for additional items, then select **Exit**.

## Creating Customers

- 1 In CRE, select **Manager** or **Options**, and enter credentials if prompted.
- 2 Select **Administrative**, then **Customer Maintenance**.



- 3 Click **Add** to begin adding customers.

A screenshot of the 'Customer Maintenance' form. At the top, it says 'Customer Maintenance' and 'This Customer All Customers Print Customer Labels'. Below that is a yellow header 'Information for: Cash Customer' with a 'Keyboard' button. The form contains several input fields: Customer # (101), First Name (Cash), Last Name (Customer), and E-mail Address. Below these are tabs for 'General Info', 'Extended Info', 'Account Info', 'Shipping/Billing', 'History', 'Notes', 'Properties', and 'Stores'. The 'General Info' tab is active, showing fields for Company Name, Primary Phone #, Bonus Points Achieved (0), Street Address, Alternate Phone #, Birthday, Street Address 2, City, Application Date (1/1/0001), State, Zip Code, County, and Card Swipe IDs (Add/Del buttons). There are also fields for Discount Percentage (0.00%), Price Level (A), and a 'Loyalty Plan: NONE' button. At the bottom, there are checkboxes for 'Charge At Cost', 'Tax Exempt', and 'Print Notes on Receipt'. A search bar is labeled 'Search by Customer #'. At the very bottom, there are navigation buttons: 'Previous', 'Look up', 'Next', 'Add', 'Delete', 'Update', and 'Exit'. A status bar at the bottom right says 'Last Search Returned 1 Customer'.

- 4 Enter required customer information, including the following:
  - ▶ Customer #
  - ▶ First Name
  - ▶ Last Name
  - ▶ Street Address
  - ▶ City
  - ▶ State
  - ▶ Zip Code
  - ▶ Birthday

The screenshot shows the 'Customer Maintenance' window. At the top, there are navigation links: 'This Customer', 'All Customers', and 'Print Customer Labels'. A 'Keyboard' button is visible in the top right. The form contains the following fields:

- Customer #: 112428
- First Name: RUBY
- Last Name: SCHMINCKE
- E-mail Address: (empty)

Below these fields are several tabs: 'General Info', 'Extended Info', 'Account Info', 'Shipping/Billing', 'History', 'Notes', 'Properties', and 'Stores'. The 'General Info' tab is currently selected. It contains the following fields:

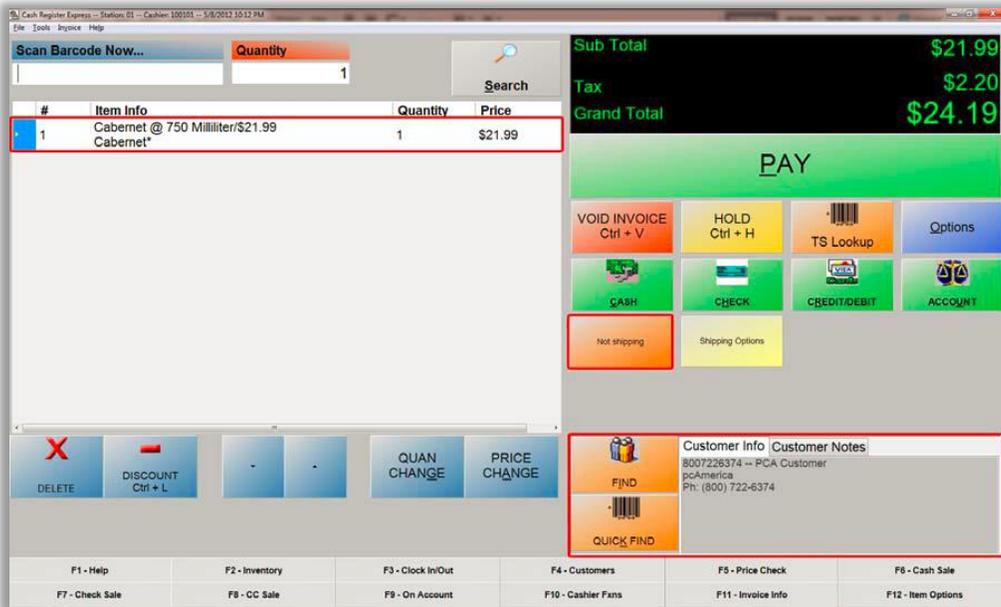
- Company Name: PCA
- Primary Phone #: 0000000000
- Bonus Points Achieved: (empty)
- Street Address: 123 Street Place
- Alternate Phone #: 1111111111
- Birthday: 09/18/1998
- Street Address 2: (empty)
- City: Town City
- Application Date: 1/1/0001
- State: IN
- Zip Code: 47404
- County: Cowardly
- Card Swipe IDs: (empty)
- Discount Percentage: (empty)
- Price Level: A

At the bottom of the form, there are several checkboxes: 'Charge At Cost', 'Tax Exempt', and 'Print Notes on Receipt'. A 'General' button is also present. At the very bottom, there are navigation buttons: 'Previous', 'Next', 'Save', 'Delete', 'Update', and 'Cancel'.

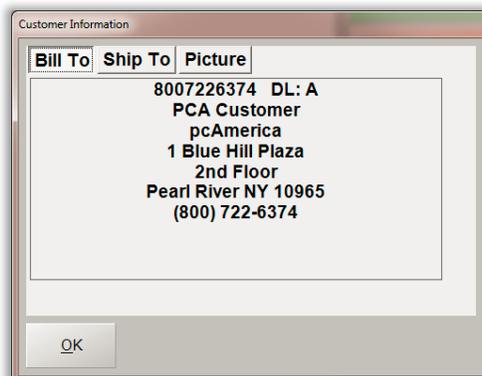
- 5 If desired, you can also enter shipping information under **Shipping/Billing** tab at this time.
- 6 Select **Save**.
- 7 Repeat the process as necessary.
- 8 When you have finished adding all desired customers, click **Exit**.

## Ringing Transactions

- 1 Log into the CRE invoice screen.
- 2 Add one of the customers created in the previous section.
- 3 Add item(s) from designated departments/brands.

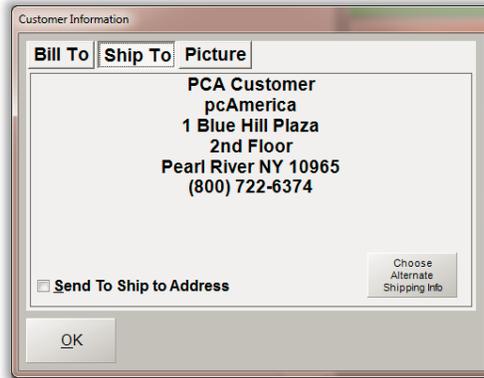


- 4 Select the **Not Shipping** button to access the **Customer Information**.
- 5 The **Bill To** tab includes the following information:
  - Customer **Number**
  - Customer's **Discount Level**
  - Customer's **First and Last Name**
  - Customer's **Company**
  - Customer's **Address**
  - Customer's **Phone Number**



6 The **Ship To** tab includes the following information pulled from the **Shipping/Billing** tab of the **Customer Maintenance** screen.

- Customer's First and Last Name
- Customer's Company
- Customer's Address

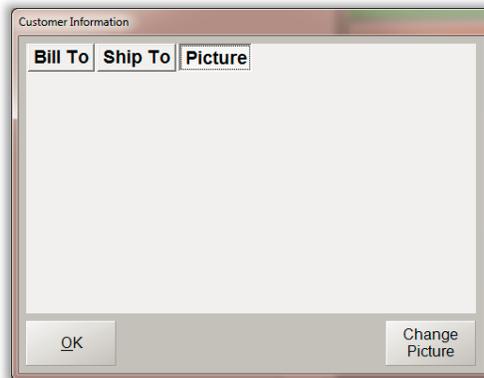


You can indicate your shipping address preference by selecting the **Ship To** tab.

- To ship to the existing shipping address, check the **Send To Ship to Address**.
- To ship to a different address, click **Choose Alternate Shipping Info**. This option allows you to select another existing customer's address, and is useful in gift orders.

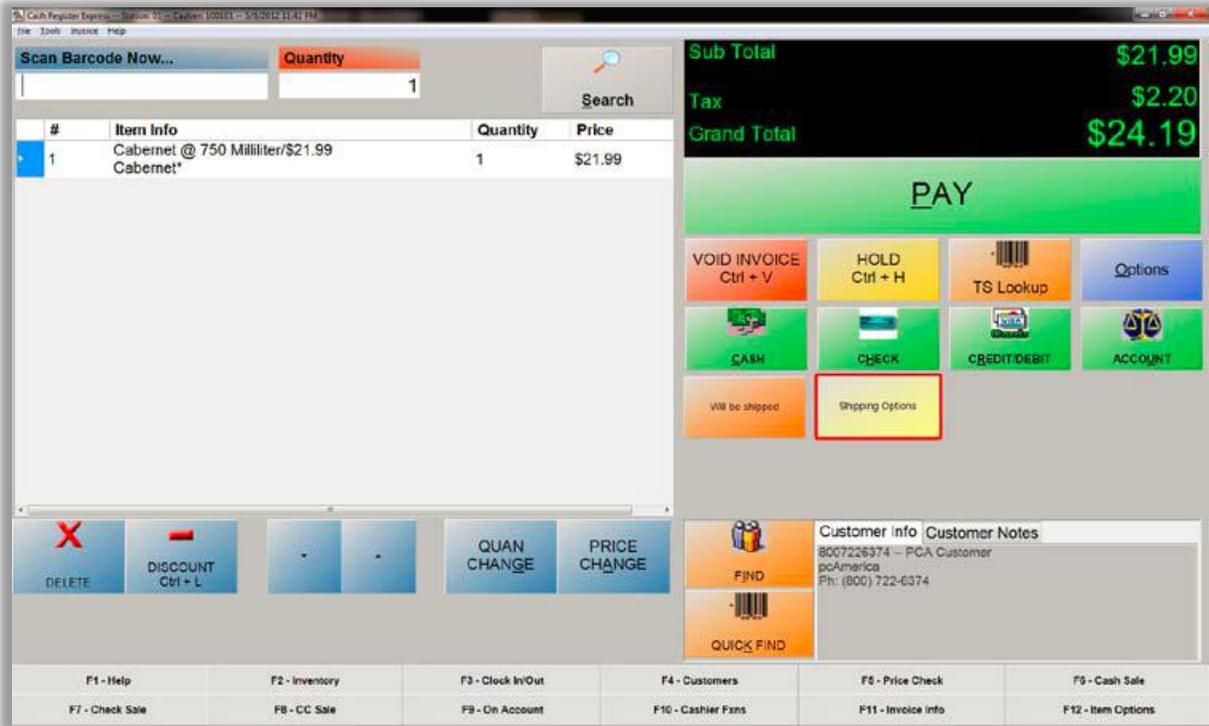
7 The **Picture** tab allows you to add a picture from an existing file to the customer's profile.

- Click **Change Picture**.
- Browse to the desired picture and click **Open**.
- Click **OK**.



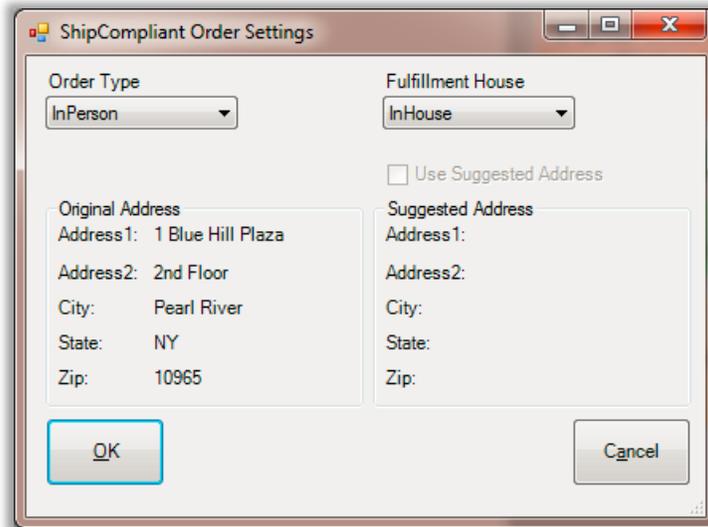
**Please note:** The maximum image file size is 470 pixels wide by 230 pixels tall.

8 To verify all shipping details are correct, click **Shipping Options**.



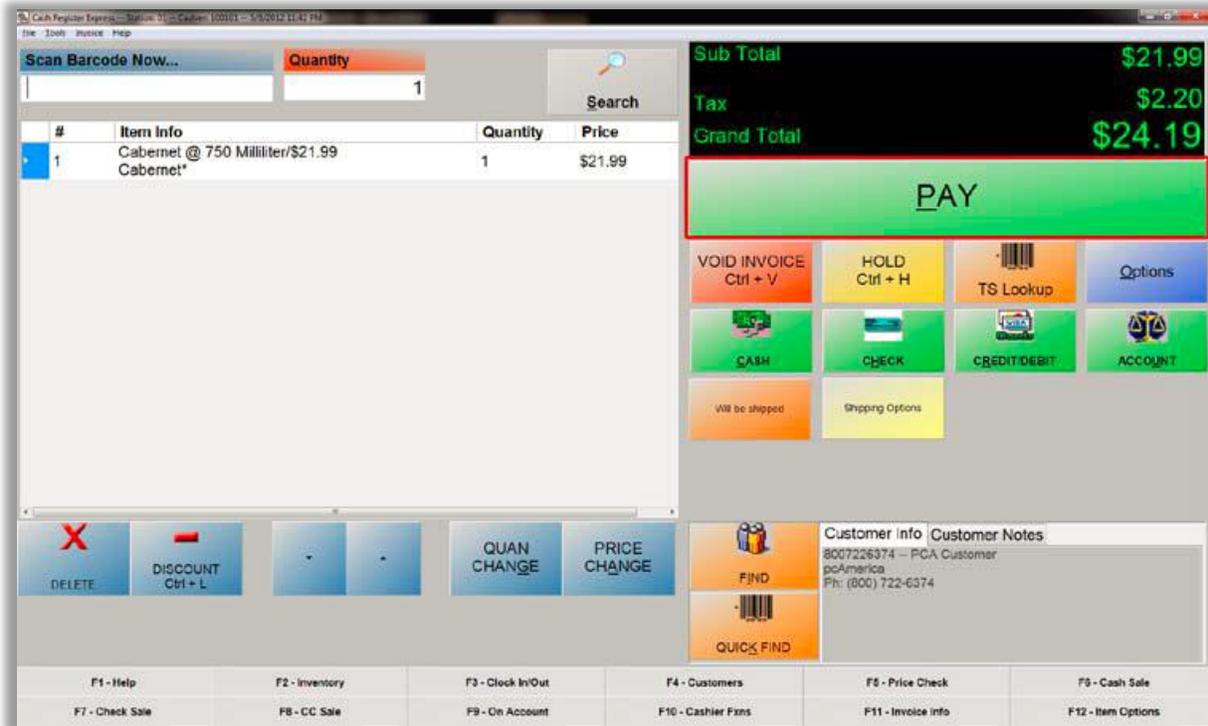
This will open the **ShipCompliant Order Settings** window.

9 Make appropriate selections under **Order Type** and **Fulfillment House**.

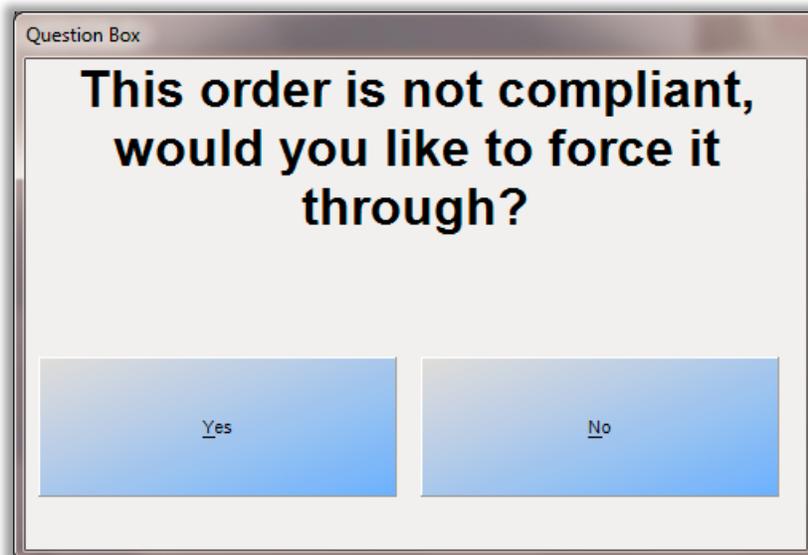


10 Click **OK** to save your changes, or **Cancel** to discard and exit.

11 Select **Pay** to initiate the compliance check.



12 If the order is not compliant, this message will appear and you can either select **No** to exit, or **Yes** to force the order.

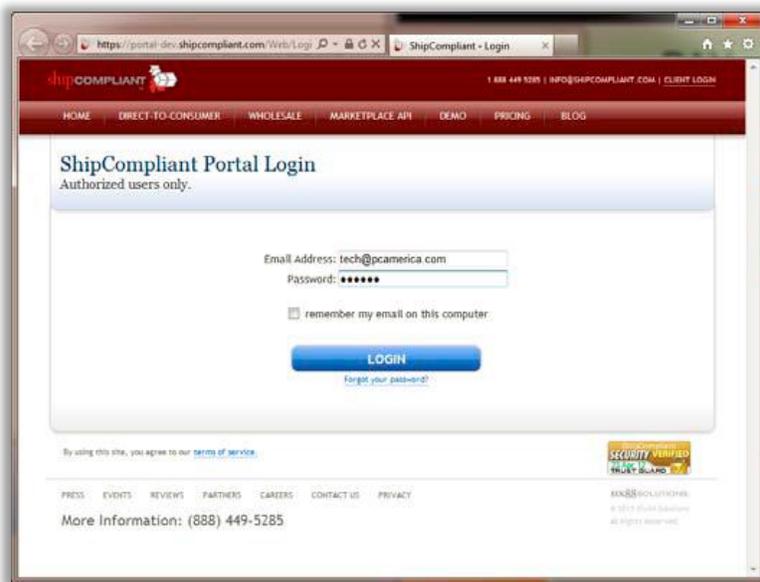


Forced orders may require additional configuration on the ShipCompliant portal.

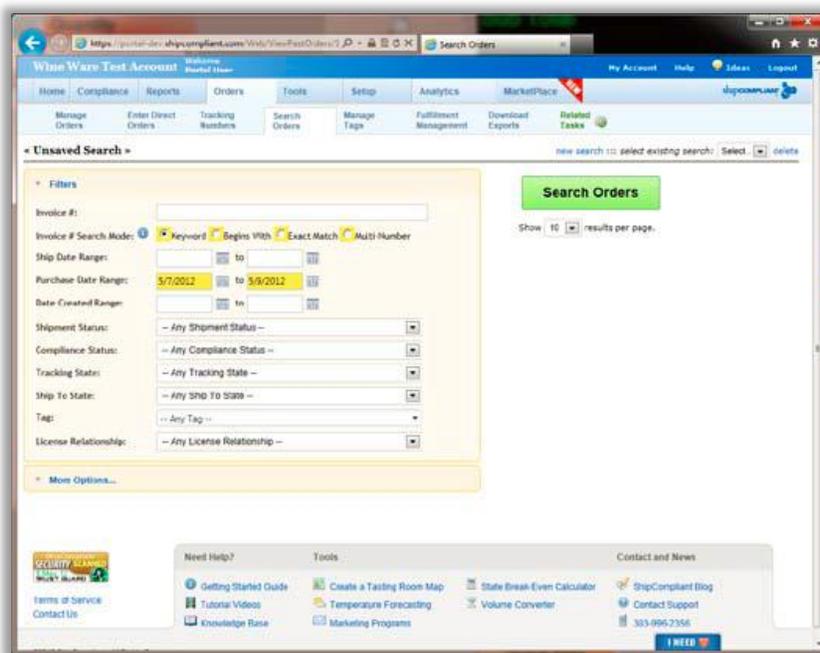
## Searching and Editing Orders on ShipCompliant Portal

You can search and edit past orders on the ShipCompliant Portal.

- 1 Navigate to the ShipCompliant Portal at <https://portal.shipcompliant.com>.

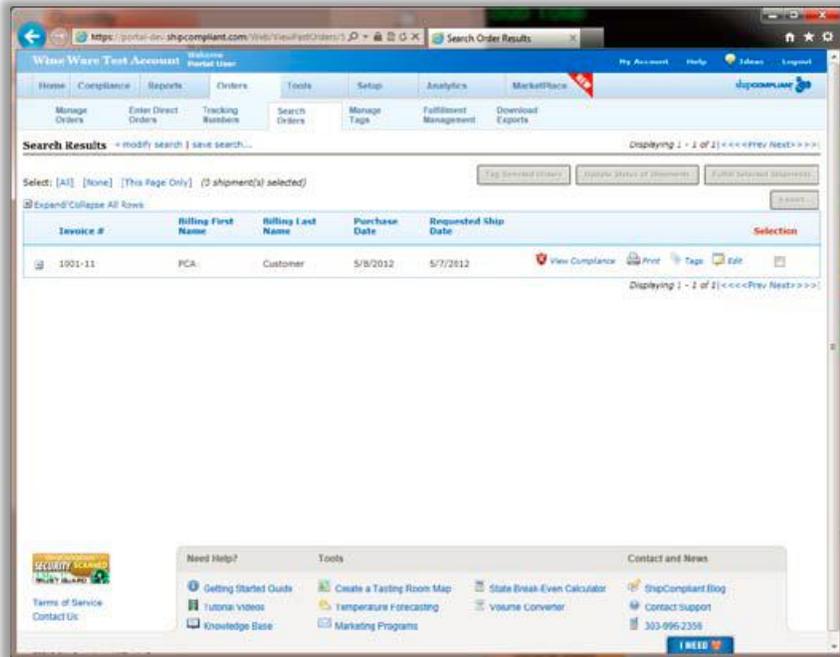


- 2 Enter your **Email Address** and **Password** and click **LOGIN**.
- 3 Select the **Orders** tab and then the **Search Orders** subtab.
- 4 Enter desired search terms and click **Search Orders**.

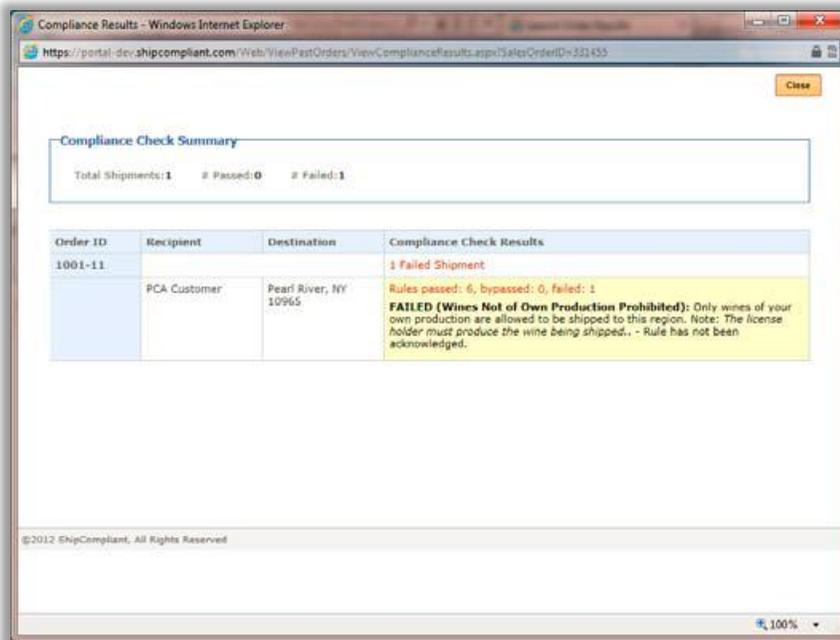


In this example, we are searching for all orders within a certain date range.

- Select the order you wish to review from the **Search Results**, and click **View Compliance**.

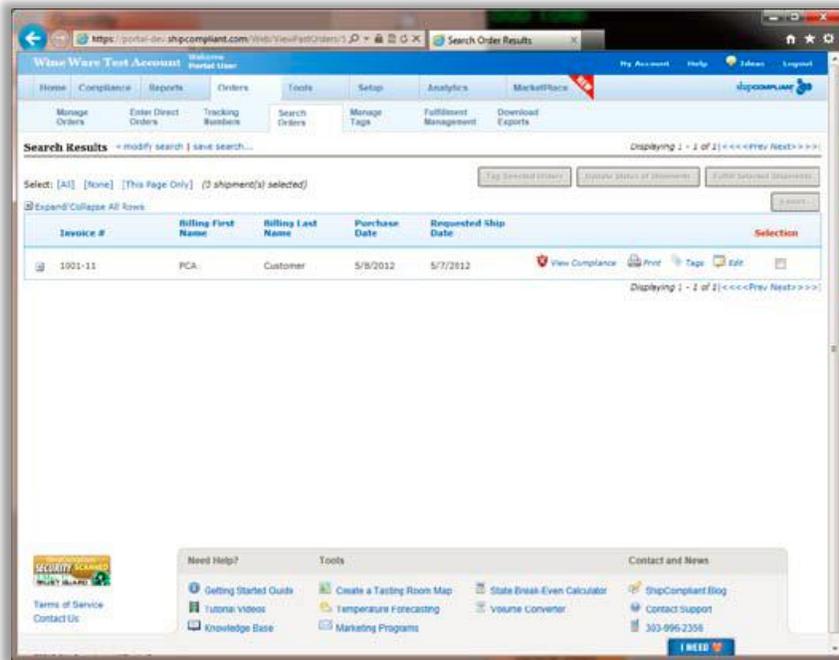


The example here failed compliance, and the message displayed cites the reasons.

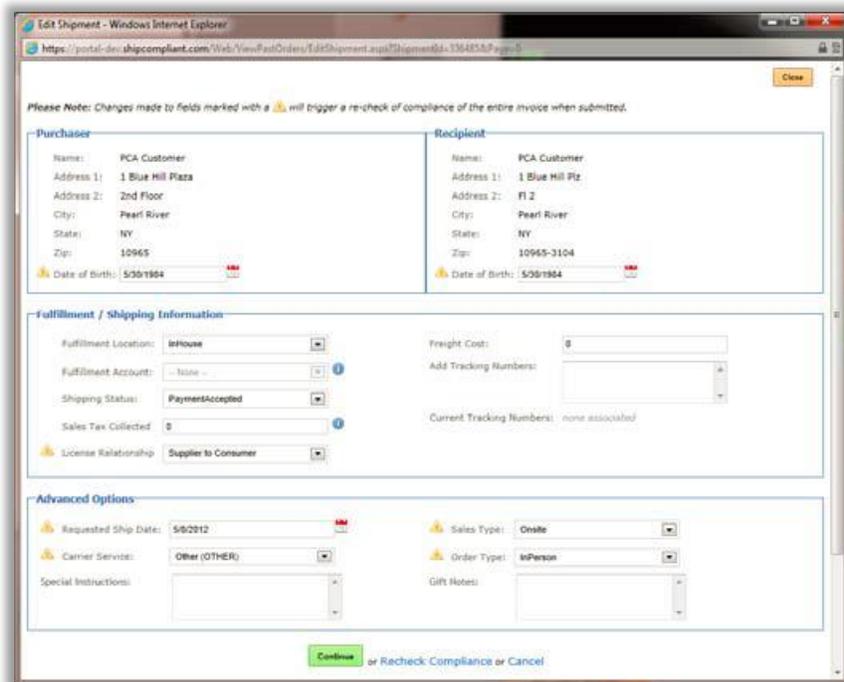


- When you are finished, click **Close**.

7 To edit the details of the transaction, click **Edit**.



8 Make necessary changes in the **Fulfillment / Shipping Information** and **Advanced Options** sections, and click **Recheck Compliance**.



9 Repeat as needed until the compliance check is successful.