

Corksy Overview

Corksy is a comprehensive **multi-tenant software-as-a-service (SaaS) platform for wineries**. Each winery (tenant) has its own isolated e-commerce site, payment integrations, compliance configuration, and data—ensuring brand autonomy and regulatory separation across the Corksy cloud. It unifies tasting-room, e-commerce, wine-club, inventory, event, and accounting operations under one cloud-native system so teams can sell everywhere while working from a single source of truth. The platform is delivered through three tightly-integrated portals—**Admin**, **POS**, and **E-commerce**—with shared data, permission-controlled workflows, and compliance-first guardrails.

1 Customer

The **Customer** module stores every person who interacts with the winery—whether they purchase in the tasting room, place an online order, or join a wine club. Profiles act as the hub for order history, club memberships, saved addresses, and payment methods.

1.1 Customer Overview

Customers manage their own details in the E-commerce portal, while user can view or edit records in Admin and POS. Key profile data includes personal information, saved addresses, payment cards, order history, memberships, and tasting-event bookings.

1.2 Personal Identification

- **First Name, Last Name, Email** (*unique per store*)
- Optional: **Phone, Date of Birth, Company, Notes, Shipping Preference Company** (preferred carrier to default on shipping labels)

1.3 Customer Categorization

- **Tags** – free-form labels set by the store (multiple allowed)
- **Class** – predefined categories (*Customer, Employee, Wine Club Member*)
- **System-segments** – automatically assigned based on behaviour:
 - *First Time* – placed first order
 - *Prospect* – registered, no orders
 - *Returning* – more than one order
 - *Wine Club Member* – active membership
 - *Inactive* – no orders in 12 months and no active membership

1.4 Marketing Opt-In

Stores record consent for promotional emails/SMS to meet GDPR / CAN-SPAM requirements.

1.5 Addresses

- Multiple addresses per customer
- One **Primary Shipping Address**
- Required: Name, Address 1, City, State, ZIP, Phone, Email, DOB
- Optional: Address 2, Company, ZIP Suffix

1.6 Payment Methods

- Multiple cards per profile, one **Primary Card**
 - Each card stores masked digits, expiry, and billing address
-

2 Club

The **Wine Club** module lets wineries create recurring shipment memberships. Clubs support both fixed (*Winemaker Choice*) and configurable (*Customer Choice*) packages on flexible schedules, surfaced across Admin, POS, and E-commerce.

2.1 Shipment Frequency & Rules

- Define fulfillment cadence (monthly, quarterly, etc.)
- A club may have multiple **Packages** per cadence
- Optional **Default Shipping Rate** per club

2.2 Wine Club Package

A **Package** represents a specific shipment cycle.

2.2.1 Package Lifecycle

- **Draft** – internal configuration
- **Open** – members or admin can edit/select; orders generate
- **Closed** – selections locked; processing only

2.2.2 Package Types

- **Customer Choice** – member selects wines; auto-fill defaults if no selection by deadline
- **Winemaker Choice** – winery pre-selects; no edits

2.3 Member Inclusion Rules

- All **Active** members included when package opens
- New joiners auto-added while package is open
- Package may be **Skipped** by member or admin

2.4 Notifications & Reminders

- **Open** notice → all members
 - **Reminder** → Customer Choice members with no selection
 - **Charge Confirmation** → after processing
-

3 Membership

A **Club Membership** links a customer to a wine club and defines how packages are shipped/billed.

3.1 Specification

- A customer may hold memberships in multiple clubs (one per club)
- Stores shipping address, billing card, and delivery preference (Ship / Pickup)
- Optional spouse contact (name, email, phone)

3.2 Membership Lifecycle

- **Active** → **Paused**
 - **Active / Paused** → **Cancelled**
 - **Switch** to different club (remains Active)
 - **Resume** paused membership (back to Active)
-

4 Order

An **Order** captures a purchase across Wine Club, E-commerce, POS, or Manual sales channels, including item details, customer data, delivery preference, and payment status.

4.1 Sales Channels

- **Wine Club** – auto-generated from packages
- **E-commerce** – customer web orders
- **POS** – in-person tasting-room sales
- **Manual** – user-created ad-hoc orders

4.2 Delivery Preference

- **Ship** – carrier or in-house fulfilment
- **Pickup** – customer collects at designated location

4.3 Discounts

Discount buckets

- **Order** – Auto or Promo merchandise discounts applied to the entire order
- **Product** – Auto or Promo discounts applied to specific items
- **Shipping** – reductions on shipping fees (stand-alone or bundled)
- **POS** – ad-hoc tasting-room discounts applied at checkout

Stacking rules

1. **Shipping bundle ↔ Merchandise:** If an Order or Product discount also includes a Shipping component, the shipping reduction is applied automatically alongside the merchandise discount. A stand-alone Shipping discount can also stack with any merchandise discount.
2. **One merchandise discount per line:** Each order line can carry **one** Auto or Promo merchandise discount (from either the Order or Product bucket).
3. **Wine-club privilege:** Wine-club orders automatically receive their club Auto discount; a customer may still apply **one** Promo code to the same order (subject to rule 2).
4. **POS overlay:** POS discounts (order-level or item-level) always stack on top of any existing merchandise and/or shipping discounts.

4.4 Shipping & Handling Shipping & Handling**

- **Carrier Rate** – real-time from FedEx, UPS, USPS, GLS; labels generated using weight & dimensions captured at item or package level
- **Internal Fulfilment** – winery ships using its own methods; user record carrier/tracking manually; weight/dimensions optional
- **Custom Rate** – flat or tiered based on weight or order total plus optional handling fee

4.5 Compliance & Tax

- Modes: **Sovos, Avalara, Manual**
- Tax types: **Sales, CRV (CA)**

4.6 Payment Methods & Lifecycle

- **Card, Cash (POS), Check (Manual), Gift Card, Terminal (POS)**
- States: **Paid, Failed, Refunded, Partially Refunded, Partially Paid** (split POS)

4.7 Fulfilment Lifecycle

- **Unfulfilled → Ready → Partially Fulfilled → Fulfilled → Restocked**
- User may **Mark as Fulfilled** (Ship or Pickup) to close an order without notifying the customer or generating a label

4.8 Order Modification & Refunds

- Editable while **Unfulfilled** (add/remove items, quantities, discounts); taxes re-calculated and deltas auto-charged/refunded
 - Refund / Restock actions:
 - **Refund + Restock Inventory** – return items to stock and refund payment
 - **Refund without Restock** – refund payment, inventory unchanged
 - **Restock Only** – increase inventory, no payment action
 - **Mark as Restocked** – internal flag to reflect manual restock already performed
-

5 Event Booking

The **Event Booking** module powers winery experiences (e.g., tastings, tours). Events expose time-slot inventory, pricing, taxes, and cancel-refund policies across Admin, POS, and E-commerce.

5.1 Booking Channels

- **Admin** – user on behalf of customer
- **POS** – walk-in bookings
- **E-commerce** – self-service

5.2 Event Configuration

- Date range, time slots, slot-capacity models:
 - **Max Guests per Slot** – a single numeric cap for each slot
 - **Table × Seat Matrix** – multiple tables, each with seat count
 - Optional per-event tax override
 - Cancellation outcomes:
 - **No Refund** – customer forfeits payment
 - **Partial Refund with Fee** – refund minus set fee/percentage
 - **Full Refund** – entire booking amount returned
 - Automatic or Promo-code discounts
-

6 Product

Products define sellable items—wine, food, merchandise, bundles—and underpin inventory, pricing, tax, and visibility rules across all channels.

6.1 Types & Variants

- **Wine, Food, Merchandise, Apparel, Other, Bundle**
- Variants (size, color, etc.) each have unique SKU, price, inventory

6.2 Bundle Logic

- Group of product variants sold as one item
- Inventory can auto-restock underlying SKUs or track bundle stock independently
- If *any* component variant is out of stock (auto-restock OFF), the bundle is marked **Unavailable** across all channels

6.3 Inventory & Visibility

- Location-level tracking; zero stock → sold out
- Wine-club selections reserve stock until confirmation
- Visibility toggles: Club, POS, E-commerce (per location)

6.4 Tax Configuration

- Tax codes via Sovos / Avalara
- CRV for CA beverage containers

6.5 Product Properties

- Collections, Tags, Brand, POS Title, SEO metadata

6.6 Product Status

- **Active** – visible and sellable on assigned channels
- **Draft** – hidden from customers; editable by user
- **Archived** – not sellable; retained for reporting history

7 Inventory Location

Inventory Locations represent physical or virtual sites (warehouses, tasting rooms, off-site storage) where stock is stored, sold, or fulfilled.

7.1 Rules & Fulfilment

- All inventory movements tied to a location
- **Fulfilment Rules** map order type + delivery method → default location(s)
- E-commerce & Club pickup orders allow multi-location choice at checkout

8 Shipping & Delivery

Corksy offers flexible shipping: real-time carrier rates, manual tables, and in-house fulfilment, all governed by compliance checks.

8.1 Shipping Zones

- Grouped by U.S. states or Canadian provinces (one country per zone)

8.2 Carrier Integration & Rates

- Connect FedEx, UPS, USPS, GLS (multiple accounts per carrier)
- Real-time rate display, label generation, tracking links
- Optional handling fee (flat or %)

8.3 Manual Rates

- Weight-based or **Order-Total** tiers (e.g., free shipping over ₹5,000)

8.4 Fulfilment Rule Types

- **Carrier Fulfilment** – automated rates, labels, tracking
 - **Internal Fulfilment** – manual shipping; no auto-label
-

9 Platforms

9.1 E-commerce Portal

- Guest or logged-in checkout; card-on-file, gift cards, Apple Pay (PayEngine), Google Pay (PayEngine)
- Customers manage addresses, payment methods, wine-club memberships, and event bookings
- For complete order lifecycle, payment, and fulfilment details, see **Section 4 Order**

9.2 POS Portal

- Tasting-room sales with location-based inventory
 - Payments: card, split, cash, gift card, terminal (PAX / PayConnect)
 - Secure 4-digit PIN user log-in; role-based permissions
 - Tip prompts, price overrides, custom discounts, receipt printing
 - Register open/close cash counts; printer routing per item
 - **Event Booking Linkage** – attach a POS sale to a specific event booking and adjust slot availability in real time
 - For complete order lifecycle, payment, and fulfilment details, see **Section 4 Order**
-

10 Third-Party Integrations

Corksy connects to best-in-class services to extend its capabilities. Each integration is permission-scoped per winery tenant.

Domain	Key Integrations (examples)
Marketing & CRM	Klaviyo, Mailchimp
Logistics & Shipping	FedEx, UPS, USPS, GLS – live rates, label printing, tracking
Compliance & Tax	Sovos ShipCompliant, Avalara – address validation, tax calculation, state shipping restrictions
Accounting & ERP	QuickBooks
Payments & Terminals	Payments: Stripe, Elavon, PayEngine Terminals: Stripe Terminal (for Stripe); PAX + Corksy PayConnect app (for Elavon); PAX + PE app (for PayEngine)

11 Glossary & Core Concepts

Term	Definition
Admin Portal	Back-office interface for configuration, reporting, and user order management.
Bundle	A single sellable item composed of multiple product variants.
CRV Tax	California Redemption Value fee applied per beverage container.
Customer Choice Package	Wine club shipment where the member selects wines; defaults are auto-filled if no selection.
DTC	<i>Direct-to-Consumer</i> sales—shipments or pickups fulfilled directly to the end customer.
Fulfilment Rule	Mapping that determines which inventory location handles an order based on channel and delivery preference.
POS (Point of Sale)	Corksy portal used in tasting rooms for in-person transactions.
System-segment	Auto-generated customer category reflecting purchase behaviour (e.g., First Time, Returning).

Term	Definition
Wine Club	Recurring membership program offering scheduled wine shipments with associated benefits.
Winemaker Choice Package	Wine club shipment where the winery pre-selects wines; members cannot modify.

Cross-Reference Tips: When reading this document in a knowledge base or RAG system, search by the exact heading (e.g., “# 6 Product”) or by glossary terms (e.g., “CRV Tax”) to jump directly to the most relevant snippet. Related topics are linked implicitly through shared terminology—e.g., **Wine Club** concepts appear in both **Club** and **Order** sections.