


**New Application Procedure:  
 Beaulieu Vineyards/Sterling Vineyards**

This new application procedure applies only to Beaulieu Vineyards (BV) and Sterling Vineyards (SV) new members. Refer to *New Application Procedure, Founders Club Members* for instructions on Diageo's other club applications. The new application process includes the addition of wine clubs, which will be explained at the end of the procedure.

For BV and SV, applications primarily arrive to the Relationship Marketing Department from the winery tasting rooms through the mail. However, customers may choose to join as a result of word of mouth or advertising and may apply on the web or by phone.



**THE HEART OF NAPA VALLEY ...**

**Beaulieu Vineyard Wine Club Membership Application**

**APPLYING FOR MEMBERSHIP IS EASY. SIMPLY FILL OUT AND MAIL/FAX THE ATTACHED FORM OR CALL 1-800-373-5896.**

**WHICH CLUB DO YOU WISH TO JOIN?**  
 Wine Society     Le Corps de Labour     Both  
 Is this a gift? We'll announce it with a special card

**SHIPPING INFORMATION**  
 Note: We must have a credit card number and signature for wine club membership. Wine cannot be shipped to a P.O. Box.  
 Name: Jane Doe  
 Business Name: ABC Company  
 Address: 1234 Deeringham St  
 City: Benicia State: CA Zip: 94510  
 Email: jane.doe@comcast.net  
 Phone (required): Day: 555-345-9890  
 Evening: 555-642-8765  
 Fax: \_\_\_\_\_

**CREDIT CARD INFORMATION**  
 Note: We must have a credit card number and signature for wine club membership.  
 Visa     MasterCard     American Express     Discover  
 CC# 5555-1111-2222-0000 DATE: 8-07  
 X Signature: Jane Doe  
 I certify that I am 21 years or older. (signature of cardholder REQUIRED)  
 Date of Birth (month): 6/74

**BILLING ADDRESS (if different from above)**  
 Name: Jane Doe  
 Address: 321 Courtney Way  
 City: Napa State: CA Zip: 94558

As a Wine Society member, I will receive a sample pack with two bottles of Beaulieu Vineyard wine every month. I agree that Beaulieu Vineyard will bill my credit card \$29.95 plus shipping and handling and state the before applicable for each regular sample pack. I understand there is a 3-month minimum commitment. As a Le Corps member, I will receive a sample pack of two to six bottles of Beaulieu Vineyard wine every three months. I agree that Beaulieu Vineyard will bill my credit card \$150 plus shipping and handling and state the before applicable for each regular sample pack. I understand there is a 6-month minimum commitment. As a member of either club, after the minimum commitment period, I may cancel my membership by giving 30-day notice at any point without further obligation except for what is set forth in the Beaulieu Vineyard contract of my choice of cancellation. It is my obligation to notify the Buyer Service or Le Corps de Labour of any address changes before sales are billed. Beaulieu Vineyard wine sales will not be responsible for shipping charges incurred due to incorrect orders. Delivery restrictions: (CA, CO, IL, IN, IA, LA, MA, MD, MI, MN, NY, ND, RI, SC, VA, WA, WI, WY, & AZ) Residents of all other states at the time of purchase are subject to restrictions. Some states have restrictions on the quantity of wine that can be shipped to a residence. Please check with the wine club representative for details. List of eligible states subject to change without notice. \*Your shipping and handling charges apply to sales only.

**GIFT MEMBERSHIP: Must be 21 years or older.**  
 Please complete the following to give a membership as a gift to friends, relatives or associates. Wine cannot be delivered to a P.O. Box.  
 Send to (Name): \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
 Daytime Phone (optional): \_\_\_\_\_  
 Duration:  3 Mo wine boxes only     6 Mo     1 Yr     Other  
 Gift card should read: \_\_\_\_\_

**THANK YOU FOR YOUR MEMBERSHIP—PLEASE TELL US ABOUT YOURSELF.**  
 Please select one box that best describes how often you drink wine.  
 Daily     Once a week     Once a month or less  
 2-3 times a week     2-3 times a month  
 Please select one box that represents the price range you regularly buy wine for the bottle.  
 Under \$7     \$10 to \$13.99     \$20 to \$29.99  
 \$7 to \$9.99     \$14 to \$19.99     \$30 or more  
 Select the one phrase that best describes how you feel about Beaulieu Vineyard wine.  
 Almost always my first choice of wine.  
 One of my favorites along with others.  
 A wine I drink, but there are others I consider first.  
 Not a wine I drink very often.  
 A wine I just don't know that much about and really don't think about.  
 Please select the one statement that best describes you.  
 I am a wine beginner.     I have a solid comprehension of wine.  
 I know the basics of wine.     I am advanced in my knowledge of wine.

**HOW DID YOU HEAR ABOUT US?**  
 Mail/Email     Newspaper/Magazine  
 Internet     Friend  
 Another Member  
 Wine Center Staff  
 Other

**FOR MORE INFORMATION**  
 phone: 800-373-5896    email: [bvwinersociety@bvwiners.com](mailto:bvwinersociety@bvwiners.com)  
 fax: 888-231-5020    internet: [www.bvwiners.com](http://www.bvwiners.com)  
**Please mail completed form to:** don't forget to sign by the X!  
 Beaulieu Vineyard Wine Society  
 P.O. Box 676  
 Rutherford, CA 94673

ENTERING APPLICATIONS

Open the particular winery’s Access® database (see *Accessing the Winery Databases* procedure, if necessary).

Click *Members* in the left column.

Click the *Add New* button.



Some of the customers' information has been removed for privacy/security purposes

Tabbing through to each field, enter the information shown on the application.

TOP SECTION, NEW MEMBER

*Last*: enter the customer’s last name; if the membership is a gift, enter the recipient’s name

*First*: enter the customer's or gift recipient's first name

*MI*: enter the customer's or gift recipient's middle initial

*Status*: this field should default to *Active*. If not, select *Active* from the drop-down box

*Contact Date*: this field is automatically completed with today's date. Leave as is

PHONE & EMAIL SECTION<sup>1</sup>:

*Hm*: enter the home phone number; if the membership is a gift, enter the recipient's phone. Enter all phone numbers in the following format: ###-###-####.

*Cell*: enter a cell phone, if listed

*Wk*: enter the work phone *Ext*: enter an extension, if listed

*Fax*: enter the fax number, if listed

*Email*: enter the customer's email address

CREDIT CARDS SECTION<sup>2</sup>:

*Type*: select the type from the drop-down box—Visa, MasterCard, Discover, American Express and Diner's Club

*Account Number*: enter the entire number with no hyphens

*Exp*: enter the month and year with no slash. Ex.: 8/07 should be entered as 0807

*Date of Birth 1*: enter the primary member's birth date with slashes: a birth date of June 14<sup>th</sup>, 1961, would be 06/14/61.

*Date of Birth 2*: enter the secondary member's birth date

Number of Digits per Credit Card
Visa: 16
MasterCard: 16
Discover: 16
Amex: 15
Diner's Club: 16

ADDRESS BOOK SECTION:

The screenshot shows a dialog box titled "Address Book" with three sections for address entries. Each section has a label (Ship To, Mail To, Bill To), an address field, a city field, and a state/zip field. The "Ship To" section includes a "Type" dropdown set to "Business" and a "Shipping Zone" dropdown set to "Zone 4". There are "Cancel" and "Save" buttons at the bottom.

Section	Label	Address	City	State	Zip	Other Fields
Ship To	Murphy's Transportation	1601 W 12th St.	Long Beach	CA	90813	Type: Business, Shipping Zone: Zone 4
Mail To		3651 E Mountain View	Pasadena	CA	91107	
Bill To		3651 E Mountain View	Pasadena	CA	91107	

<sup>1</sup> There must be some form of contact information in this section. If there is none, consult with management as to whether to hold off on entry or send a letter, etc.

<sup>2</sup> We must have a credit card number when setting up a member. If no credit card is listed, call the customer and do not enter the application until we have this information.

**Ship To** block<sup>3</sup>:

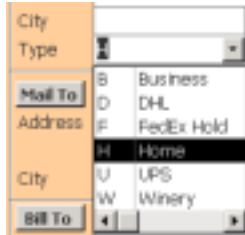
The top line of the Ship To section must only be completed if the product will be shipped in care of someone other than the member or to a business; otherwise, the product will automatically ship with the primary member's name as the addressee. Use *C/O* if entering another name into this field.

*Address*: enter the address indicated for shipping

*City*: enter the ship city

*State*: the unidentified drop-down box next to *City* is for the state; select ship state

*Type*: select the type of location that will receive the shipment, such as *Home* or *Business*



*Zone*: refer to the *UPS Zone Chart* (although we use this chart to obtain the zones, we do not use UPS as our shipping method). See Attachment A. Look up the first three digits of the ship zip code on the chart to locate the zone number, using the first column of numbers under *Ground*. Select the correct zone number from the drop-down box.

**Mail To** block<sup>3</sup>: Be sure to look at the bottom of the handwritten application to determine whether the customer has completed a different billing address. Assume the mailing address is the same as the billing address, as the application does not provide separate sections. If there is no separate billing address, click the *Mail To* button, and the information from the shipping fields will automatically populate the mailing address fields. If the billing address is different, manually enter the address into the *Address*, *City*, *State* and *Zip* fields. No zone is necessary in this section.

**Bill To** button<sup>4</sup>: Click this button, as the billing address should normally be the same as the mailing address. Again, the fields will automatically populate.

*Date of Birth 1* and *2*: format is mm/dd/yy.

Click *Add*. You have now entered the client's information.

Record the member number showing at the top of the database window on the application in thick pen.

<sup>3</sup> If the membership is a gift, the recipient's information should appear in this block.

<sup>4</sup> If the membership is a gift, type the gift giver's name and address in this section.

### ADDING WINE CLUBS TO MEMBER INFORMATION

Part of the application process includes adding clubs to each member profile.



Click the plus sign next to *Wine Club Memberships* on the customer information screen.

The club entry screen then appears.

A screenshot of a 'Membership Details' form. At the top, a dropdown menu is set to 'Cellar Club'. To its right are fields for 'Original Start Date' (30-Dec-03) and 'Cancelled Date'. Below this is a 'Credit Card Account' section with fields for 'Card Type', 'Account #', and 'Exp:'. Further down are 'BillName:', 'Bill Notes:', and checkboxes for 'Gift' and 'Prepaid'. There are also fields for 'Original Shipments:', '# Remaining:', 'Start' (30-Dec-03), and 'End'. Below that are 'Referred By' and 'Wine Rep:' dropdowns, a 'Comments:' text area, 'Status' (New Customer), and 'Expires' field. At the bottom right is a list of months from Jan to Dec, each with a checkbox. The 'Dec' checkbox is selected. At the very bottom are 'Cancel' and 'Save' buttons.

Example of a new club screen in the Sterling database

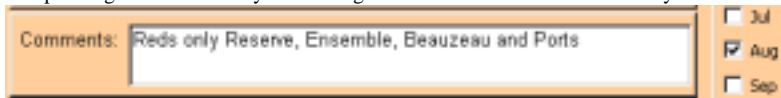
Click the dropdown box at the top, left of the screen. Choose the applicable club, using the chart below. Criteria from this chart should be used to enter correct information into the Membership Details screen.

*Beaulieu Vineyards and Sterling Vineyards clubs:*

Wineries	Clubs	Usual Shipment Frequency*	Description/Comments
Beaulieu Vineyards	\$29.95 Wine Society	monthly	2 bottles/mo; be sure to select <b>\$29.95 Wine Society</b> , and not just <i>Wine Society</i>
	Buyers Club	n/a	\$40 annual fee paid to buy wine with no membership requirement, but no club privileges
	Le Corps	quarterly	4-6 bottles/quarter; entire club name is <i>Le Corps De Latour</i>
	Library Selections	quarterly	2-4 wines/shipment; automatic delivery of unique, seasonal wines; tend to be upper-tier or reserve wines
	No Logic** LC (for Le Corps)	quarterly	qty determined by customer
	No Logic** WS (for Wine Society)	monthly	qty determined by customer
	Reds Only Le Corps	quarterly	4-6 bottles/quarter
	Reds Only Wine Society	monthly	2 bottles/mo
	Specials	varies	set up individually with unique parameters
	Sterling	Cellar Club	monthly
No Desert Wine		monthly	2/bottles/mo; no sweet wines are shipped
No Logic** Club		customer choice	qty determined by customer
Platinum Club		quarterly	4 bottles/quarter; comparable to BV's Le Corps
Promotional Opt-Out		bimonthly	2 bottles/shipment; customer must notify us so they do not receive shipment
Promotional Opt-In		bimonthly	2 bottles/shipment; customer will not receive shipment without notifying us
Red Wine Only		monthly	2/bottles/mo
White Wine Only		monthly	2/bottles/mo
Specials		varies	set up individually with unique parameters

\*Clubs can be assigned different frequencies from what are listed here. Above are the default frequencies for each club.

\*\*Members of No Logic clubs receive special-request shipments. Preferences are entered into the Comments section of the *Membership Details* screen. A report is generated monthly for No Logic clubs and the orders are manually entered.



For our example of the club entry process, we will use *Sterling Cellar Club*. Select this club in the dropdown box.

*Original Start Date*: already populated from the application just entered

*Cancelled Date*: leave blank at the new member level

**Credit Card Account:** click the *Credit Card Account* button. A dialog box appears with the credit card information entered at the application level:

Type	Account Number	Expiration
AM	5555-5555-5555-5555	0707

Click *Select* to confirm the credit card number already entered.

**Bill Name:** if the membership is a gift, type the gift giver's name in this field, otherwise, leave blank

**Bill Notes:** enter phone number of gift giver, otherwise, leave blank

**Gift:** check either this box or *Prepaid*, if a gift; if this box is checked, the gift giver will be billed monthly

**Prepaid:** check this box if the gift giver wishes to pay a lump sum for a finite duration instead of monthly

**Original Shipments:** type the number of months of gift duration or leave blank if not a gift membership

**Number remaining:** type the same number of months as the gift duration; this field will automatically decrease as the shipments are sent, for future inquiries

**Start:** automatically populated

**End:** type in end date of gift

**Referred By:** do not complete this field

**Wine Rep:** enter the initials of the sales representative; this information should appear handwritten on the application

**Comments<sup>5</sup>:** nothing will be entered into this field for most clubs

**Status:** click the dropdown box and select *Active*

**Expires:** do not complete this field

**Notes:** do not complete this field at this stage—the purpose of the field is providing reasons for cancellation, etc.

**Opt:** only select an option for this field if the club is a promotional-opt-in or opt-out club

**Method:** if the club is a promotional-opt-in or opt-out club, select *Email*; if the client lists no email address, select *US Mail*

Enter the frequency of shipments by checking the boxes next to applicable months. Refer to the club chart for the particular club. For our example, the Sterling Cellar Club is a monthly club, so check each month's box.

Click *Save*.

You have completed the new application process.

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<sup>5</sup> Special club features are entered here—for instance, if the client is in a No Logic club, their preferences should be listed (example: *Reds only reserve, Ensemble, Beauzeau and Ports*)

**UPS Zone Chart**

UPS Ground/UPS 3 Day Select/UPS 2nd Day Air/UPS 2nd Day Air A.M./UPS Next Day Air Saver/UPS Next Day Air

For shipments originating in ZIP Codes 944-01 to 948-99. To determine zone, take the first three digits of the receiver's ZIP Code and refer to the chart below:

ZONES						
Dest. ZIP	Ground	3 Day Select	2nd Day Air	2nd Day Air A.M.	Next Day Air Saver	Next Day Air
004-005	8	308	208	248	138	108
006-007	45	-	225	-	-	125
008	[1]	-	[1]	-	-	[1]
009	45	-	225	-	-	125
010-089	8	308	208	248	138	108
090-099	-	-	-	-	-	-
100-199	8	308	208	248	138	108
200-299	8	308	208	248	138	108
300-339	8	308	208	248	138	108
340	-	-	-	-	-	-
341-374	8	308	208	248	138	108
375	7	307	207	-	-	107
376-379	8	308	208	248	138	108
380-381	7	307	207	247	137	107
382-385	8	308	208	248	138	108
386-387	7	307	207	247	137	107
388-399	8	308	208	248	138	108
400-499	8	308	208	248	138	108
500-509	7	307	207	247	137	107
510-511	6	306	206	246	136	106
512-528	7	307	207	247	137	107
530-534	8	308	208	248	138	108
535-540	7	307	207	247	137	107
541-543	8	308	208	248	138	108
544-567	7	307	207	247	137	107
570-577	6	306	206	246	136	106
580-582	7	307	207	247	137	107
583-588	6	306	206	246	136	106
590-591	5	305	205	245	135	105
592-593	6	306	206	-	-	106
594-599	5	305	205	245	135	105
600-609	8	308	208	248	138	108
610-617	7	307	207	247	137	107
618-619	8	308	208	248	138	108
620-667	7	307	207	247	137	107
668-672	6	306	206	246	136	106
673	7	307	207	247	137	107
674-693	6	306	206	246	136	106
700-704	8	308	208	248	138	108
705-706	7	307	207	247	137	107
707-709	8	308	208	248	138	108
710-729	7	307	207	247	137	107
730-732	6	306	206	246	136	106
733	7	307	207	-	-	107
734-739	6	306	206	246	136	106
740-745	7	307	207	247	137	107
746	6	306	206	246	136	106
747-762	7	307	207	247	137	107
763	6	306	206	246	136	106
764-767	7	307	207	247	137	107
768-769	6	306	206	246	136	106
770-787	7	307	207	247	137	107
788	6	306	206	246	136	106
789	7	307	207	-	-	107
790-797	6	306	206	246	136	106
798-799	5	305	205	245	135	105
800-832	5	305	205	245	135	105
833	4	304	204	244	134	104
834-835	5	305	205	245	135	105
836-837	4	304	204	244	134	104
838	5	305	205	-	-	105
840-844	4	304	204	244	134	104
845	5	305	205	-	-	105
846-847	4	304	204	244	134	104
850-853	5	305	205	245	135	105
854	4	304	204	-	-	104
855-859	5	305	205	245	135	105
860-864	4	304	204	244	134	104
865-880	5	305	205	245	135	105
881-882	6	306	206	-	136	106
883	5	305	205	-	-	105
884	6	306	206	-	-	106
885	5	305	205	-	-	105
889-893	4	304	204	244	134	104
894-897	3	303	203	243	133	103
898	4	304	204	-	-	104
900-929	4	304	204	244	134	104
930-935	3	303	203	243	133	103
936-954	2	302	202	242	132	102
955	3	303	203	243	133	103
956-959	2	302	202	242	132	102
960-961	3	303	203	243	133	103
962-966	-	-	-	-	-	-
967-968	[2]	-	[2]	-	-	[2]
969	-	-	[1]	-	-	[1]
970-974	4	304	204	244	134	104
975-976	3	303	203	243	133	103
977-979	4	304	204	-	134	104
980-985	5	305	205	245	135	105
986	4	304	204	244	134	104
988-992	5	305	205	245	135	105
993	4	304	204	244	134	104
994	5	305	205	-	-	105
995-999	[3]	-	[3]	-	-	[3]

[1] For Virgin Islands, Guam, Marshall Islands, etc., please refer to the Worldwide Rate and Zone information.

[2] For Hawaii, contact UPS

[3] For Alaska, contact UPS