VinNOW Installation and Set Up Information

Document Review:
We recommend you review the following documents on our website
(https://www.vinnow.com/clientcenter/doc) prior to installing your VinNOW system:

➢ Computer Requirements
➢ Installing SQL Server Express
➢ Troubleshooting & Error Messages
➢ Checklist for Connectivity Issues

We also highly recommend that you read through this document prior to starting your installation.

Virtual Environments:
VinNOW does not support Windows Server 2012 Foundation Edition, Windows Server2012 R2 or any Virtual operating systems or environments. The program may appear to work in these environments, however, use may result in connectivity issues and unexpected data issues as the program or integrations may not be able to fully perform as designed. Use of VinNOW in a Virtual environment will invalidate your support contract.

Prior to install, your system should be current with all Windows Updates, and .NET Framework 4.5 installed.

SQL Server Installation

SQL Server 2012 with Management Tools must be installed on the database/server machine only, SQL Server Native Client 2008 R2 must be installed on the server and all client machines. The express version of SQL Server 2012 can be used for installations of 10 workstations or less. If you are installing over 10 Workstations, the full SQL Server product is required.

See our document "Installing SQL Server Express" on our document website for information on downloading the appropriate executable for your system and required SQL Server settings.

SQL Server is a Microsoft product, if you have questions about installing SQL Services please contact your IT support or Microsoft. Microsoft SQL Server is not a VinNOW product. VinNOW support personnel therefore, although knowledgeable on requirements for VinNOW, do not install or assist with SQL Server issues.

Firewall

On the Computer where SQL Server and VinNOW is installed the Windows Firewall must be configured to allow SQL access. At a minimum this means exceptions must be provided for the SQL Server engine, "sqlserver.exe", and the SQL Server Browser, "sqlbrowser.exe", or alternatively; SQL Server TCP port 1433 and SQL Browser UDP port 1434.

VinNOW Folder Set Up

VinNOW recommends that you have User Account Controls turned off for the installation and setup of VinNOW.

In the Control Panel, Folder Options, "Simple File sharing" should be turned OFF prior to setting up the VinNOW Folders.

VinNOW folders should be set up and named exactly as specified in this document. These folders should only contain the information that is placed in them by the program. Users should never place information into or delete files from the VinNOW folders, with the exception of the Logos folder.

Primary VinNOW Folder

On the Root drive create a folder named VinNOW_DB. If you have a data drive you can use this, however, the VinNOW_DB folder should be in the root drive and <u>not</u> placed within another folder. Share the VinNOW_DB folder and under security assign full control to all users, including "everyone". This will become the primary folder where the database and associated folders will reside.

Inside the VinNOW_DB folder create a folder named Update. This will be the folder where the program Setup.exe and VinNOW.msi will reside.

Create a folder in the same Root drive named VinNOW_Logos.   Share the VinNOW_Logos folder and assign full control to all users. This folder can be used to store Logos for the program and the printers. <u>This is the only VinNOW folder that users should store information and pictures into.</u>

Client Center

The VinNOW program itself is available for download in our "Client Login" Center which is located at the top right corner of our website www.VinNOW.com If you are the primary contact for VinNOW and have not previously been in the Client Center, the email address that you have provided us is your user ID and goes on the top line. You then should click on "Forgot your Password" which will email to you instructions for resetting your password. You have been setup as an "Owner" for the client center and have the ability to grant other users access to your Client Center site by setting them up with their own login information.

Once in the Client Center you can download the program, send files or databases to support if needed, and have access to training Video's and other information.

Download/Install VinNOW

Once in the Client Center, navigate to "Latest VinNOW Release-Do not upgrade on weekends" and click on that link. Among the instructions you will see "VinNOW Installation Download" You can then click on that link and utilize the "save as" to download the program ZIP folder into the Update folder within the VinNOW_DB folder that you created on your root drive.

Extract the files into the VinNOW_DB\Update folder.

Run the setup.exe folder and follow the prompts to install the program. You will know the program is installed when the install wizard is completed and there is a VinNOW shortcut on your desktop.

If you have data that was converted, stop at this point and let VinNOW support know that you have installed the program and are ready for your installation appointment that should have already been scheduled.

If you do not have data that was converted:
Once you have installed the program, double click on the VinNOW icon on the desktop. You will be prompted to enter the Registered Company Name and Serial Number. These must be entered *exactly* as they were emailed to you.

Once you select OK, you will be prompted for the pathway to the database location and the SQL Server instance name. You only need to path to the VinNOW_DB folder. On a standard installation the path would be: C:\VinNOW_DB . Once you have entered this pathway, tab out and the SQL Server Name should be the SQL instance name that you installed. If it is not exact, and the only difference is the "SQLEXPRESS" on the end, change it to the correct instance name.

Once these steps have been successfully completed you will get a message that the DB needs to be created. Select "ok" to create the database. Once the database is created you will be prompted to follow a wizard and create a user profile and enter specific information about your winery.

Startup Wizard

When the install process completes you will be automatically taken into a set up wizard designed to assist you in putting in basic set up information. It is recommended that you have the information on hand to use this wizard to enter the information requested; however most of this information can be changed from within VinNOW after you have completed the Wizard if needed.

VinNOW User Profile
The first screen of the wizard will be to set up an Admin user profile for VinNOW. This user will automatically have all permissions in VinNOW granted and should not be your primary sign in. You will need to use it when you complete the wizard to log in and develop other user profiles, but after that we recommend you put the password into your safe or other secure location in case of emergency where you need an administrator to log in.

Each VinNOW User should be set up with their own VinNOW user profile as access to functions and reports are determined by user permissions within VinNOW. We recommend you keep administrator users to a limited group.

Some things to keep in mind about user profiles:

User Name: A more complete descriptive version of the User ID

Password: This is the password the user will log on with and will use to log into the cashier screen to make a sale. User passwords should be strong passwords:

- ➢ 7 characters (7 exactly for printing cashier log-on cards)
- ➢ Must include both numeric and alphabetic characters
- ➢ Must be changed at least every 90 days
- ➢ Cannot be the same as the last 4 passwords entered into the system
- ➢ Passwords are never displayed anywhere in the system. After six repeated failed login attempts
- ➢ VinNOW will automatically lock out the user account for 30 minutes or until an administrator that has permissions to work with user profiles signs on and you can reset your password.
- ➢ Password must be unique and only belong to one user.

Sales ID: Will display to customers. Each Sales ID must be unique, only belonging to one user.

User ID: A person's initials or first name are generally used. Each user ID must be unique and only belong to one user. This is what will be used to log on to the VinNOW system and will not display to customers.

Winery Information

The next screen is the winery information screen. Enter in your winery's information and contact information that you want displayed to the public.

Payment Forms and Shippers

For the next two screens, select the forms of payment your winery accepts and the shippers that you use.

Wine Clubs

Enter in the names of your wine clubs. This screen will automatically create wine club products with the name that you enter. Wine club names should be kept to 30 characters so the name will not truncate or wrap on reports and should not contain special characters such as ( )' /#" etc.

Inventory Location

Enter all the inventory locations that you wish to have VinNOW track inventory in. Examples of locations are Tasting Room, Warehouse, and Case Storage. Designate whether the inventory location is tax paid or not. Tax paid status is used by VinNOW to determine if the inventory is available for sale, inventory can only be sold out of tax paid locations. Tasting Room is automatically entered for you on this screen, if you are not sure you are going to sell or track inventory from other locations, you can always add locations to the program at a later time.

When you complete the wizard, you will be taken into the program. If you have not had training on the system yet, you can close out of the program at this time. We do not recommend that you do data entry or continue set up until you have been trained on the system. Time spent by VinNOW support to correct data entered before training has been completed is outside the support contract and will be billable.

Your VinNOW system is now set up and you can connect your client machines. Your first session of training will review the initial set up and continue with assisting you in learning how to set up the rest of your VinNOW files.

Connecting Client Machines

Once you have installed your VinNOW program on your server or database machine you can connect the other VinNOW workstations or "Client Machines".

Please refer to "Installing VinNOW Client Computers" on our document website https://www.vinnow.com/clientcenter/doc.

You will be prompted during the client machine install to enter the Registered Company Name and Serial number. The information can be found within VinNOW on the Server or any of the VinNOW workstations in the Set Up menu, System options, System Option Settings at the bottom of the screen. As a reminder, this information needs to be reproduced exactly, including any capitalization in the Registered Company Name.