

Samples, Donations, Spoils, Pouring

Donations & Samples Overview

Donations and Samples can be recorded in cashier or back-office sales, Spoils and Pouring's are recorded in Cashier only. An invoice will not be generated for these transactions and will not appear in customer records, even if the donation or Sample was generated in a customer's file. The Business Summary and Non-Sales reports will record these transactions. The Non-Sales report can also be accessed from the cashier screen, Register Menu, Reports. **Note: the product must have a cost entered for the Non-Sales and Business Summary reports to tally the cost of goods.**

Creating a Donation, Sample, or spoil

To Record a Sample, Donation or Spoil enter the product onto the cashier screen and you can attach a customer record to this invoice the same way you would for a sale.

Note: a customer record is not required, however if you wish to have the customer recorded associated with the action on the report you must attach the customer record. You would then be able to search for specific customers on the Non-Sales reports to view what donations/samples/spoils they are associated with.

Once you have the product on the screen, Click on the Sample, Donation or spoil button either on the cashier screen or in the Process Menu. Another window will open which will provide you an area to make a note (required) for the log. Once you have done so, click on OK.

At this point the Donation, Sample or Spoil will be recorded and VinNOW will return to the cashier sign on screen. Reports on transactions can be viewed in Cashier under the Register Menu-Reports-Non-Sales report, or in Back office under Reports, Non-Sales.

Shipping a Donation or Sample

In order to ship a sample or donation an invoice must be created to get the shipment into the shipping functions of VinNOW. To do so, create an invoice for the customer you are shipping to and select the product "shipping add-on". Attach shipping and process as you would any shipped order.

Using the shipping add-on product, you will be able to create a packing slip/invoice for shipping that does not affect inventory or charge the customer. Your inventory would have already been decremented by recording the sample/donation.

Note: invoices with "shipping add-on" do not get sent to ShipCompliant.

Pouring

To record opening a bottle for pouring, from the cashier screen select the bottle you wish to record and press the "pouring" button or the pouring option in the Process Menu then click ok. At this point the pouring will be recorded and VinNOW will return to the cashier sign on screen.

Voiding a Sample or Donation

In back office under the Maintenance Menu, Non-Sales, you can void any Sample, Donation, Spoil or Pouring if needed. Search for the item by entering the date or dates of event, highlight the entry and select void. You will be prompted to enter a reason (required) and it will record as voided. The entry will stay on the maintenance area as voided but will be removed from your reports and will be returned to inventory.