Cashier Screen Overview

The Cashier Screen is normally used when the customer is standing in the tasting room as sales rung through the cashier screen are considered to be **on-site** for tax purposes.

Passwords

Passwords must be entered in the cashier sign on screen to enter the cashier screen and after each sale. By entering a password VinNOW protects your cash drawer and it also identifies the user's name associated with the password to each sale and sets the user security. Credit Card regulations require password protection for PCI Compliance.

Within VinNOW you have the ability to print a cashier login card that can be scanned to enter your password while you are on the cashier log in screen. Please see VinNOW Setup User Profiles for more information. If you intend to print a cashier log in card, your password must be 7 characters due to bar code restrictions.

Once you have entered in your user password you are ready to make a sale in Cashier mode.

The User Id of the person signed into Cashier will be used on all invoices created. In Back Office, the User Id can be changed on each invoice created.

Menu Items

Menu options only show when applicable. For example: Payments will be gray and not accessible if you have not selected any merchandise to sell. Options will also be grayed out if you do not have permission to use or access the function.

New Sale

At any time during a sale, you may click the New Sale button (or press Esc) to clear the screen and start over. The information of what you have already put onto an invoice will be listed on the Discarded Orders Report if your actions in cashier have created an invoice. This is if you at any time suspended the sale or Pre-Auth'ed the sale. If you just have put products on the screen and click New Sale it will not add to the Discarded Orders Report.

To open the cash drawer without a sale: With NO items selected Click on the **Cash** Button. The green payment process window is displayed. Click on the $0.00 or OK button. This completes the No-Sale Process. The cash drawer should open at this time. Some systems require the receipt printer to be on.

Cash Screen Menu Bar
The functions are available but based on the user security permissions. If grayed out it is because there is not a transaction available or the option is not available for the transaction.

File Menu

Exit Cash Screen
This will take you out of cashier and to the back office search screen. Ctrl + Z and F2 will take you out of the Cash Screen back to the Search Screen.

Exit VinNOW
Use this to quit VinNOW and close the program.

Process Menu

Cash Check...
Allows you to record a check taken in exchange for cash without ringing a sale. A customer is required for this transaction. This will be added to the daily shift report.

Non-Sales Donations, Samples, Spoils, Breakage, Wine Pouring...
This allows you to select a product and attach to a customer if desired and use the appropriate Non-Sales selection.

Payment Options
A way other than selecting the buttons on the left side of the cash screen to select a payment method.

- Cash
- Check
- Credit Card
- Credit Memo, if a valid credit memo is on file within VinNOW.
- Gift-Use, for redeeming Gift Cards for merchandise.

- Invoice, record as an invoiced transaction to the customer's account with no payment taken. Must select a customer for this option.
- Payment -Outside CC Payment- Use this option if you wish to do a cashier sale that you have already collected payment for outside of VinNOW. This option will record the sale as paid and give you the option of recording the last 4 of the credit card used and make a memo/note about the charge. This charge will be recorded against the invoice but will NOT be sent to the credit card processor. Minimum information needed to process is the Card Type (MC, Visa, etc.)

Print Loyalty Membership Card
Allows you to print a Loyalty membership card from the cashier screen if you have a card printer.

Return Merchandise
You will need to have the original invoice number to enter a merchandise return using this menu option. For more information on return merchandise see Back Office Sales - Merchandise Return in the Help Center.

Suspend Sale
Allows the current sale in process to be parked on the sales tape while other sales are rung up. When you chose to suspend the sale, you can distinguish the order in the Ticket ID. This information will show up on the receipt printed for the customer and is limited to 20 characters.

If you have outstanding suspended sales when the shift is closed, you will get a warning notice that you still have suspended sales. You will not be able to close your shift with suspended sales pending.

Pre-Auth Sales
Any pre-authorized sales must be closed on the workstation it was opened on. If an attempt is made to close a pre-auth on a workstation set as retail it will not go through. The preauthorized sale must be closed from the workstation it was preauthorized from due to the way EMV credit card readers process the orders. Pre-Authorized sales left on the sales tape will prevent the shift from closing.

Taster Tally
During the sale you can click on Taster Tally and enter the number of tasters you wish to record. This option is the same as clicking the taster tally button. You can also use the F6 Key to quickly ring taster tallies.

Void Invoice
When selected, a window appears to let you find the invoice. You can search by date and/or register ID, or blank those two fields and put in the invoice number. If you void an invoice from a previous day and give cash to the customer, remember you must do a register pay out to balance your drawer. For more information on Voids see Back Office Sales – Voids in the Help Center.

Register Menu
Add Cash
A screen will appear that allows cash to be recorded that you are adding to the cash drawer. Enter in the specific number of each denomination of cash you are adding.

Cash Payout
Will allow you to record cash paid out from the register. You will be prompted to enter the amount and a reason for the payout. This feature is only used to balance the cash drawer and will show on the closed shift report, it does not post to QuickBooks.

Close Shift
You have the option on the **Close Register Shift** screen to either, close the shift and count the drawer at the register, or select **Close Pending** and count your register drawer elsewhere prior to closing.

Closing the shift
Select close shift and the Close Register Shift screen will appear that allows you to enter in all cash and checks in your cash drawer from this shift while you are at that workstation. You will be able to see the register shift sales, if you have user permissions to view this information.
Depending on your Credit Card Processor, just above the Notes block is a check box **Close (your card processor) batch** that is checked by default. When you close the shift, it will send a signal to your credit card processor to close the batch unless you uncheck this box. If the box is not there the credit

card processor is set to auto close at night. It is recommended to not uncheck this box so when you close your shift to close your batch so the transactions are transmitted to your processor for payment.

Close Pending

Select close shift and the Close Register Shift screen will appear. Click the **Close Pending** button and it will park the Close Register Shift report. You can remove your drawer and take it to another computer that VinNOW is installed on and count the drawer there. You can then access the register shift and close the pending shift from the other VinNOW computer.

VinNOW strongly recommends closing your batch when closing the shift so the transactions are transmitted to your processor for payment.

Reports

Reports for cash register functions can be run here. These include Non-Sales (pouring, spoils etc.) and Register Open or Close and Register Pay Out reports. These reports can also be found under Reports-2 menu in the back office.

Sales Tape

The sales tape can be accessed from this menu, or pressing F5 when in cashier. The Sales Tape lists all invoices for specific cash registers for a specific day, depending on your search criteria and allows you to work with them. The default search criteria when you first go into the sales tape will display the sales from that register for the shift that is currently open.

Wine Taster Maintenance

This will display the number of tasters per hour for a given date. You can change/correct the numbers entered during the day. By selecting a different date at the top of the screen you can look at tasters for another day.

User Menu

Print Cashier Login Card

If the person that is logged into cashier needs to reprint their Cashier Login Card, they can do so by inputting their password. You cannot print the Cashier Login card for a user other than the user that is currently logged into cashier from this screen.

Reset Password
If the person that is logged into cashier needs to change their password, they can do so by using this menu function. You will be prompted to put in your current password then put in your new password and confirm it. You cannot change the password for a user other than the user that is currently logged into cashier from this screen

Time Clock
If the user that is logged into cashier is required to clock in and out via VinNOW's time clock feature, this Time Clock option will be active. This Menu option allows the user to clock in and out from the cashier screen. If the user is not required to clock in and out it will be grayed out for that user. If multiple users are on the computer make sure the user listed on the top of the cashier screen is the user clocking out or in.

View Login Notes
This menu option allows the user to pull up the log in notes that would be displayed to them if they were logging into the VinNOW program itself. Cashiers that start their shift after VinNOW is already logged on should use this menu option to review any notes assigned to their profile.

Help Menu

VinNOW Help on the Web
This is the most current Help Manual and requires an internet connection.

Send a message to VinNOW Support
This option allows you to send either an error message which will attach any system error logs with it, or a general question/suggestion to the VinNOW support team.

About VinNOW
This option displays VinNOW version information.

Other Fields:

The **Email Receipt** field allows you to check the box and enter the email address of the person and email the receipt. It will also pull up the customer record that the email belongs to if it is already on file.

The **Opt Out** Box, will check the Opt Out box in the customer record, so as you filter for email campaigns you can use this filter for customers that do not want to receive correspondence.

The **Inventory Location** field lets VinNOW know where to pull the inventory from for that specific invoice. On the Cashier screen the default inventory locations are set up in the Cashier/Workstation Settings.

The **Order Type** field lets VinNOW know the type of order for that specific invoice. On the Cashier screen the default Order Types are set up in the Cashier/Workstation Settings. Order types are used in the reporting function to be able to narrow search fields so you will be able to run reports targeting specific types of orders such as Tasting Room, Tele sales, Web Orders, or Special Events.

The **Order Source** or Marketing source fields lets you chose the specific source you want for the invoice if different than what was defaulted. On the Cashier screen the default Order Source is set up in the Cashier/Workstation Settings.

If checked, the **Print Copy to Fulfillment Printer** will direct the receipt also to the fulfillment printer for shipping or kitchen services.

Cashier security profiles can be set up to either allow or not allow cashiers to change the Inventory Location and Order Type. If the cashier does not have security permissions to change these settings they will not display on the screen.

VinNOW recommends cashiers do not have permissions to change inventory location and order type.

Invoice Notes:
The invoice note field gives the cashier the ability to attach special instructions or comments to an invoice. These notes will display on the customers receipt when it is printed.
If you add a manual note, it must be done after any automatic discount notes are added. Notes will print on receipts and any back office invoices.

Shortcut Keys
By Pressing the F1 key you will get a menu of shortcut keys. By either clicking on the button or pressing the associated F key, you will be taken to that function. These keys will take you directly to the function listed if your user profile has permission to use that function. If you do not have permissions, the button will be light gray to indicate it is not available. The F4 Suspend and F8 Invoice keys will be gray until you ring up a product as neither of these functions would apply without a sale having been started.

F-Keys:
Esc= New Sale
F1-Displays help F Key Menu
F2-Exit Cashier
F3-Customer
F4-Suspend
F5-Sales Tape
F6-Taster Tally
F7-Void Ticked
F8-invoice
F9-Close shift
F10-Discount maintenance
F-11-Print Loyalty Card
F12-Product Maintenance

To close the F Key menu there is a small yellow x box in the right corner of F12