

How to Ring A Sale

Cashier is for a sale where the person is in the tasting room, for compliance it is considered an "On Site" sale

When the customer is not going to ship any product or leave a tip-Basic Sale:

Enter your password on the cashier sign on screen to access the cash register.

Look up your customer

Customers are not required for a sale, but the more information you have in the system the better. Customers can be looked up before or at any time during a sale. Click the Customer Look up button to bring up the customer search screen. You can look up an existing customer or add a new customer here.

If you look up a customer before the sale their discounts will be applied as you are ringing up the sale. Note: In order for a customer to receive the discounts associated with their customer record, their customer record will need to be selected. If you do not choose a customer VinNOW will use "Point of Sale Customer" and the invoice will not be associated with any specific customer.

Ring up your product

Scan the UPC code or select the product from the list, VinNOW recommends scanning to eliminate the possibility of selecting an incorrect vintage. Click the item and it will display the product for sale, click it again and it will increase the quantity that you are selling. You can also increase quantity by simply changing the quantity field to the amount you want and tab out of the field. The "unit" field is a drop-down box where you can change between sales by the bottle, or case if appropriate. If you add an item by mistake, change the QTY field to zero and tab and it will remove the item from the invoice. You can manually change the QTY at any time by overwriting the value and tabbing out.

Apply any Discount

If the customer is in the database and has an automatic discount in their record, when you select their record to be attached to the sale you will see that the computer automatically applies the discount to the sale. If the

customer does not have an automatic discount; you can still apply one using the "Discount" button on the left of your screen. If you are changing discounts make sure to "clear all" to get rid of any previous discounts. see POS **Discounts** for further information.

Choose payment type: cash, check, credit card.

Payment buttons are located on the left of the cashier screen. Once you have completed ringing up the sale and verified that it is correct, you should apply a form of payment to the invoice. Note: The "Process" Menu on the cash screen has additional payment options such as Gift Cards, Credit Memo and Invoice.

Cash- If the sale is cash and they have the correct amount you can simply click the key directly below the "OK" button which shows the order total. If they do not have the correct amount, you can either enter in the amount that the customer is giving you in the cash collected block or chose one of the other buttons that displays set amounts (\$5 - \$100)

Check- simply enter in the check amount and the check number.

Credit- Press the Credit Card button, you can then choose:

For a standard swipe or chip sale, click "Process Charge" then swipe or insert the card thru the credit card reader and follow the prompts. **Note: EMV cards that were issued outside the US may, depending on the issuing bank, may require the customer to enter a "pin" number. This action is not enabling the reader to run a "debit" transaction; it is an additional layer of security that requires the user to know the pin number of the card in order to use it.**

Credit Card Payment

Cancel Invoice No: 2277
 Customer: 1002
 Chester Arthur

Tip Amount: \$0.00
 Invoice Balance: \$118.40
 Total Charge Amount: \$118.40

TSYS

Process Charge

Manual Entry

Get Card On File

Split Credit Payment

Phone Authorization

Record charge without processing

Click "Process" for PAXTerminal SwiPoEntry

For Manual entry, click "Process charge" with the check box for "Manual Entry" checked to enter the credit card

Credit Card Payment

Cancel Invoice No: 2277
 Customer: 1002
 Chester Arthur

Tip Amount: \$0.00
 Invoice Balance: \$118.40
 Total Charge Amount: \$118.40

TSYS

Process Charge

Manual Entry

Get Card On File

Split Credit Payment

Credit Card Number:

Expiration Date: (MMYY) Card Type:

Card Present

Card Member Name First: Chester Last: Arthur

Zip Code: 5448

Address 1: 9426 Route #36

To use a card on file in a customer record, when you get the above screen, click "Get Card on File"

Credit Card Payment

Cancel Invoice No: 2277

Customer: 1002
Chester Arthur

Tip Amount: \$0.00

Invoice Balance: \$118.40

Total Charge Amount: \$118.40

TSYS

Process Charge

Manual Entry

Get Card On File

Click 'Process' for PAX Terminal Swipe/Entry

If you are splitting the ticket between credit card and another form of payment such as cash, process on the Credit Card the amount you wish to apply towards the invoice then select the next form of payment.

VinNOW

Cancel

Collected Amount is less than the Balance Due, click 'Cancel' or select another payment method to make the balance of the payment.

Select Additional Payment Method

Select

- Cash
- Check
- Credit Memo
- Gift/Certificate
- Credit Card

Print Loyalty Mem... \$0.00

Email Receipt \$118.40

Inventory Loc \$0.00

Order Type: \$0.00

Order Source:

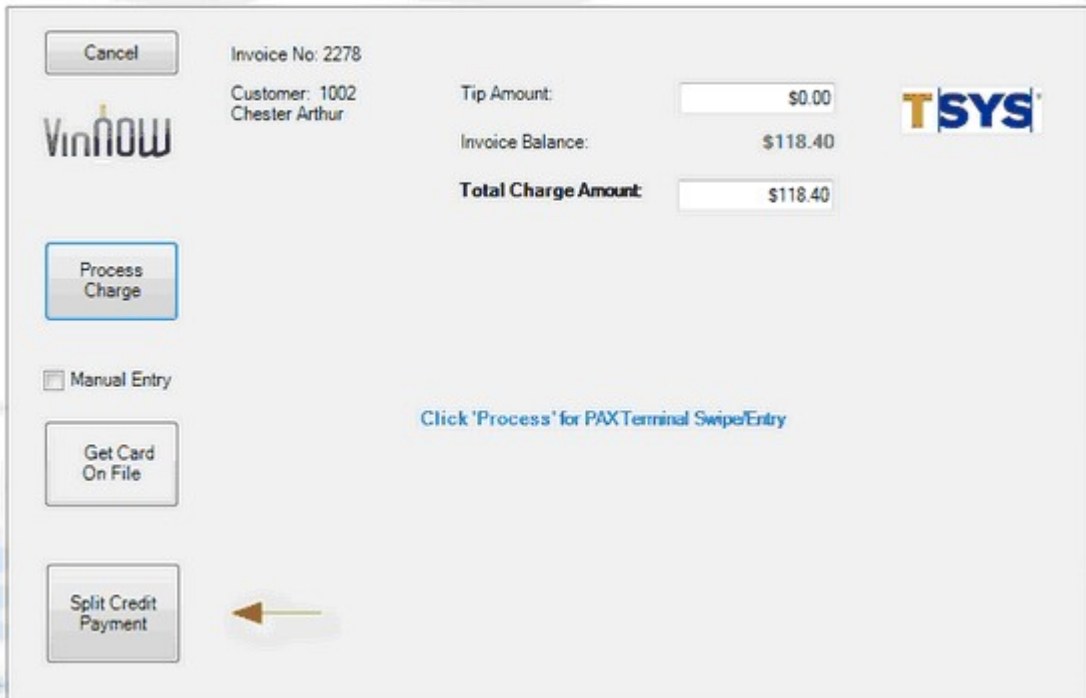
Invoice Note: Print Copy to Fulfillment Printer **Total \$118.40**

Discount applied - Silver Club Mixed - Wine **Collected \$50.00**

Amount Due \$68.40

If you are splitting the payment into more than one credit card, develop the invoice, select the Credit Card payment option, then when the credit card screen comes up, select "Split Credit Payment"

Credit Card Payment



Invoice No: 2278
 Customer: 1002
 Chester Arthur

Tip Amount: \$0.00
 Invoice Balance: \$118.40
 Total Charge Amount: \$118.40

TSYS

Cancel

Process Charge

Manual Entry

Get Card On File

Split Credit Payment

Click 'Process' for PAX Terminal Swipe Entry

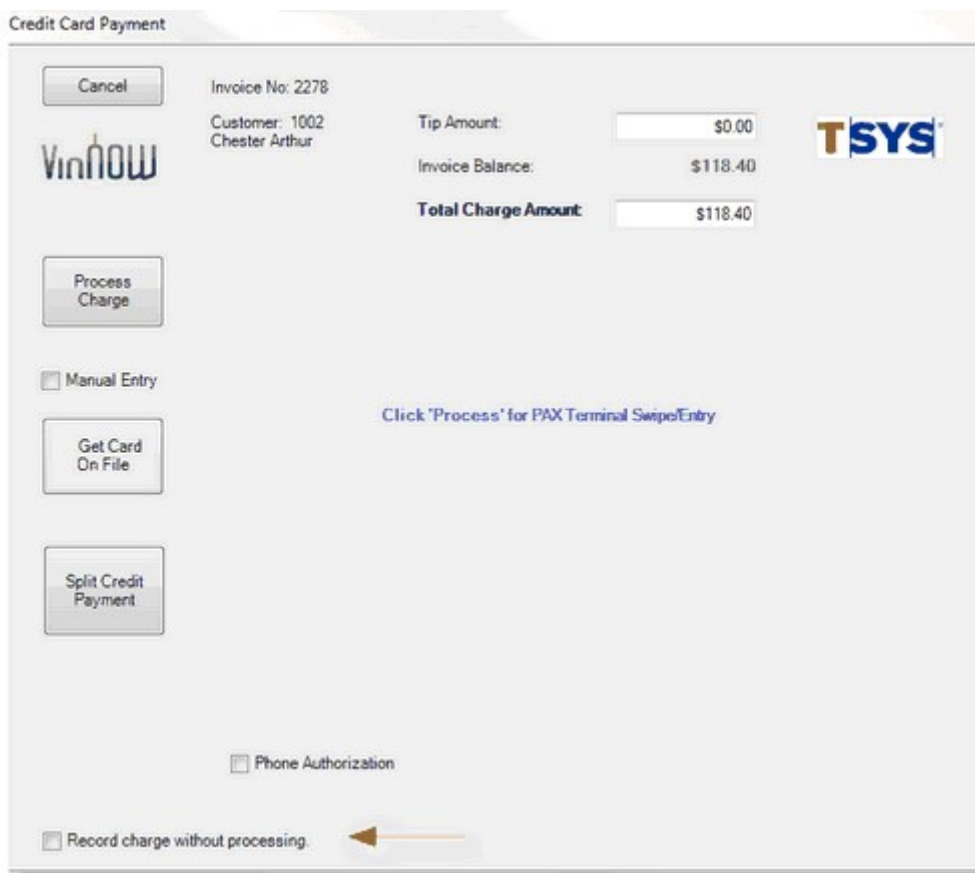
You will then get a screen asking how many ways you wish to split the payment into. This screen will split the payments into even amounts. Note: you can only split the payment over 9 cards.

You will then get as many payment screens as needed to process the credit cards as you normally would.

The "Phone Authorization" box should be used when you have charged a card outside of VinNOW and have a phone authorization number that goes with the charge. You do not select to use the card on file, all you need to do is check the box and it will give you fields to enter the credit card number, expiration date, and the phone authorization number into. This will send a "Forced" charge to your processor and that information will be matched up with the information they have on the sale. If you have done a phone authorization outside VinNOW you must send this forced charge in order to get your authorization deposited. We recommend if your internet is down and you are doing phone authorizations that you suspend the sales and write down the above information until your internet is back up so you can just resume the sales without having to recreate them and process with the phone authorization box.

Note: if your internet goes down and you have to call in phone authorizations, we recommend you develop the sale in VinNOW and suspend it printing a copy of the sale and write the authorization number you are given by your credit card processor on the invoice so when your internet comes back up, you can just resume the sales, matching them up by invoice and use the Phone Authorization block to send the information to your credit card processor.

Record Charge Without Processing: If you need to record the charge in VinNOW but not actually charge the card, select the "Record charge without processing" check box in VinNOW and select the type of card (MC, Visa, etc). VinNOW will mark the invoice as paid, it will be reflected on your reports as paid with the credit card type, but the information will not be sent to your credit card processor and the credit card will not be charged.



Credit Card Payment

Cancel

Invoice No: 2278

Customer: 1002
Chester Arthur

Tip Amount: \$0.00

Invoice Balance: \$118.40

Total Charge Amount: \$118.40

TSYS

Process Charge

Manual Entry

Get Card On File

Split Credit Payment

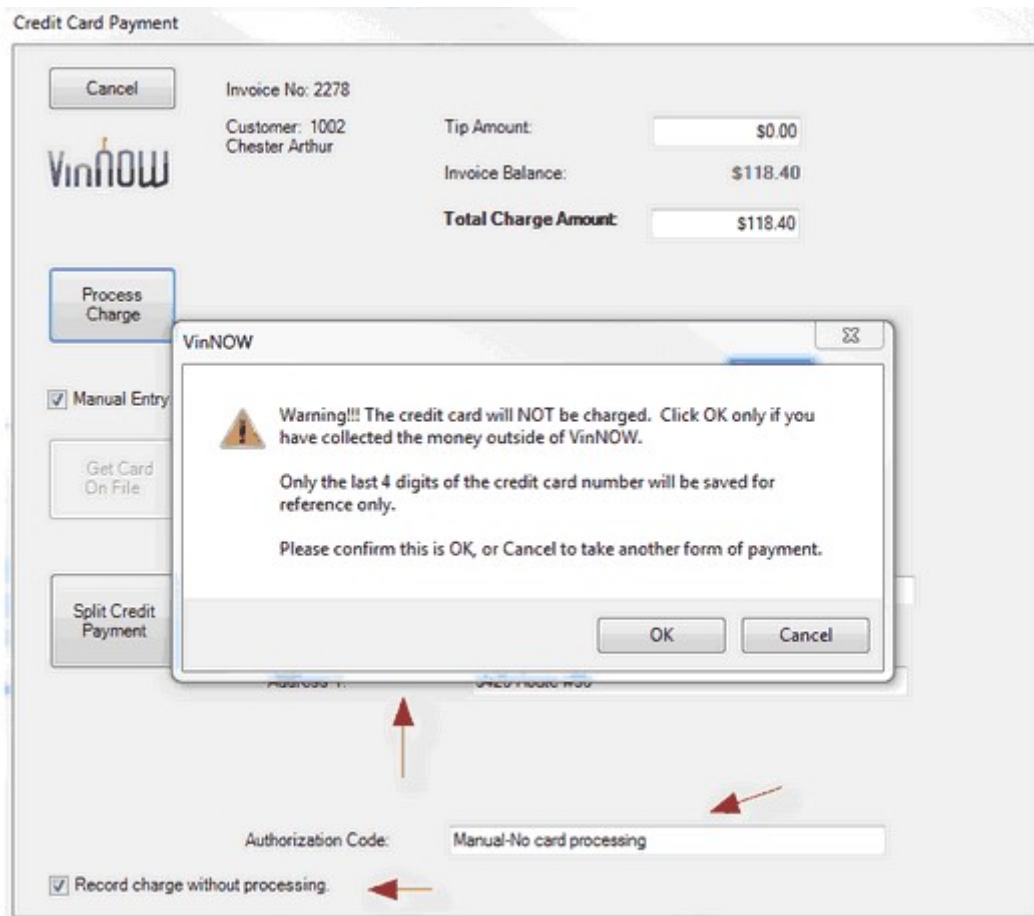
Phone Authorization

Record charge without processing. ←

Click 'Process' for PAX Terminal Swipe/Entry

When using "Record charge without processing" you should then get a warning screen letting you know the card will not be charged, in the "Authorization Code" it should reflect "Manual-No card processing" and the

"Record charge without processing" should be checked. If all these are present and you wish to record the charge without processing, select "OK"



When you enter the payment, the computer will process the invoice, return your display to the cashier sign on screen, print the receipt and open the cash drawer. You have now completed a basic sale.

Note: If using Near Field Communication (NFC) such as "Apple Pay", the credit card number is different from the actual card number and will not be stored in VinNOW. This specific number can only be used once and therefore does not create token that can be stored.

See Cashier Payments section for other payment options