

CUSTOMER LOOK UP

Loyalty Card/Customer Number Look up:

VinNOW provides a quick customer look up by loyalty card or customer ID. With your cursor in the <Enter Product> screen if you press F3 the screen will toggle to <Enter Customer ID> Swipe the customer's loyalty card or enter the customer record number and VinNOW will pull up that customer's record.

Note: If the F3 key is clicked twice the Customer Lookup window will be opened. If you press F3 a third time it will take you to the customer "quick add" screen. You can go quickly directly to "quick add" by pressing F3 three times in rapid succession.

Customer Name Look up

You can also click the Customer Lookup button on the left of the screen. A Select Customer screen will pop up where you can enter search criteria in any of the boxes. You may enter in several different criteria at one time, the cashier screen searching works exactly like the back-office search screen except you cannot change the search fields.

Note: sometimes less is better. For example - if in Last Name you enter in "Sm" you would find both Smith or Smyth. This way if someone misspelled the last name of Smith, you may still find the person you are looking for.

Press the Search button once you have entered your search criteria. A list will display in the window below the search fields containing any VinNOW records matching your search criteria. If you see the customer, you are looking for, either single click on that record and then click the Select button to the left or double click on that record to select that customer and add the customer to the sale.

View Full Record

If you wish to view the entire customer record before proceeding with a sale, click the View button. This will take you to the full record. Changes, if necessary, can be made to the open record, then click the Update button. Once finished with the record, click the Exit button to go back to the Select Customer screen. If you are going to continue with a sale to that customer, click the Select button to assign that customer to the current sale.

Note: changes that you make to the customer record will affect any sale that you have in process. For example, if you change the customer type to one that is eligible for wholesale pricing levels, when you attach that customer to the sale the invoice will automatically change and give that customer wholesale pricing.

Quick or Full Add

If you do not find the customer you are looking for, you have the option of "Quick Add" or "Full Add" button on the left of the screen and add that customer to the database from the screen you are in.

"Quick Add" will bring up a basic information window to add the customer. The minimum amount needed to add the customer is Last Name, First Name and either State or Zip. If you enter their zip code and tab out of the field, it will fill in automatically the city and state. Please be aware that some zip codes cover multiple cities so check with the customer and make sure you have their correct city. You can always go back into the record of a Quick Add customer and add more information later. Quick Add is intended to create a customer and ring up a sale quickly.

"Full Add" button can be used if you have time to create a new record with complete customer information and will bring up a new customer record as if you were entering a new customer in back office.

Note: If you enter a customer in by mistake that already is in the database, VinNOW has a merge customer feature to incorporate the unwanted record into the correct customer record.