

Customer Records

Primary Customer Information Tab

File Process Help

Customer Maintenance

VinNOW 1005 Smith, Kathy Customer Since: 5/13/2019 Wine Club: BarbClub Life Time Total \$: \$341.60
 Futures Buyer: No Last Sale \$: \$22.31
 Most Purchased: Chardonnay Last Sale Date: 2/5/2021

Double click to select customer picture

Exit << >> Update New Note New Order Payment Payment Hist. Print Inv. PDF / Email Member Card

Wine Clubs	Shipments	Customer Notes**	Orders	Additional Info
Primary Customer Info	Shipping Info	Billing Info		
First Name: Kathy Last Name: Smith Recipients Name: Kathy Smith Company Name: Address Line 1: 202 1st st Address Line 2: Address Line 3: City: Rothschild State: Wisconsin Zip Code: 54474 <input type="checkbox"/> Bus. Address Country: Email: DOB: <input type="checkbox"/> Email Opt Out Persons Title: Contact Person: Phone #1: H (619) 555-1212 Ext: Phone #2: C (707) 326-1111 Ext: Phone #3: B (619) 555-1234 Ext 123 Fax #: Memo:	Mailing Label: Kathy Smith 202 1st st Rothschild, WI 54474 Address ID: 1st Address <input type="button" value="Validate"/> <input checked="" type="checkbox"/> Same Ship Address: <input checked="" type="checkbox"/> Same Bill Address Customer Type: Retail Sales ID: Barb Cust Category 1: Cust Category 2: Marketing Source: Direct Mail Alternate Contact Person: Phone #1: <input type="checkbox"/> <input type="text"/> Ext: <input type="text"/> Phone #2: <input type="checkbox"/> <input type="text"/> Ext: <input type="text"/> Phone #3: <input type="checkbox"/> <input type="text"/> Ext: <input type="text"/> Fax #: Email: <input type="checkbox"/> Opt Out Web Site:			

Primary Customer Info: This is the primary contact person for the customer. It may not be the person receiving the shipment. Enter all appropriate information on the primary customer screen, then click on Add before clicking any other tab on the record.

Note: Enter the Primary Customers name and address info. then click on Add before clicking any other tab or you will lose the primary info.

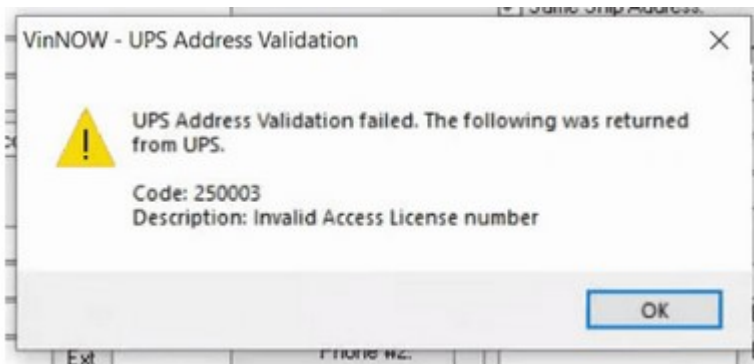
Multiple addresses are possible. The same Ship or Bill Address is automatically checked and will default the customer information to the appropriate tab.

To add a different address for shipping and/or billing, on the Primary, Shipping or Billing tab, uncheck the box (if they are checked) for "Same Shipping Address", "Same Billing Address" Or "Same Primary Info Address". Then select the drop down for "Address ID" and another screen will appear that you can select the address you want for this tab from the list, or create a new address entry.

DOB: VinNOW treats the DOB as part of the address, if you did not enter the dob in conjunction with an address, when you apply that address without the DOB it will wipe out any existing DOB in that tab. Additionally, if you add a DOB to an existing address and save that address it will create a new address as you have changed it by adding a DOB. VinNOW works this way because of the different state shipping rules for wine.

Country Code: Do not put in the Country if the customer is in the US. VinNOW will automatically assume the customer is in the United States.

Validate Button: If you are ShipCompliant customer you will be able to click this button to validate the address with ShipCompliant. If ShipCompliant has a suggestion for the address you have the option to accept or decline the suggestion. If you are not a ShipCompliant customer it will attempt to validate the address with UPS. If you are not using UPS you will get a message similar to:





Customer Type: is defined by the winery to categorize customers. Customer types point to pricing levels (retail or wholesale) and what invoice template will be used for invoices.

Sales ID: is created by the person who creates the customer record in either cashier screen or back office. This ID is not linked to orders.

Cust Category 1 and 2 are defined in Setup - VinNOW Files - Cust Category to allow you to enter criteria to group customers that is both reportable and searchable. You should become familiar with VinNOW and the available reports prior to setting up these categories so that you are not entering one that already exists.

Email Address: The email address field is linked to Outlook. If you have Outlook installed on your computer and want to send an email to the customer you can double click on the email address field and an email template will appear. You can hover over the email address to see the date of the last time the address was changed.

IT Notes: When you click on the email address button VinNOW checks to see if Outlook is installed, if it is, it launches a new email window with the PDF receipt automatically attached. However, if Outlook is not installed, VinNOW calls whatever the default email client program that is installed on the PC by calling the "mailto:" command API. In this case, VinNOW cannot attach the PDF receipt automatically so it displays a message telling the user they will need to manually attach the PDF to the email client window that is opened. Finally, if there is not any default email client program installed on the PC the user will not be able use the "PDF / Email" button option to send an email.

Mailing Label: This area is comprised of the "Recipient Name" and address and is used if you are printing mailing labels.

Phone numbers have a dropdown box in front of them to designate what type of phone it is. Click in the gray box to get a list to choose from.

Memo: This is a free form text field that displays in search results from Back Office searches.

Marketing Source: is defined by the winery and is a dropdown field from the table set up in VinNOW Files.

Alternate contact person may be searched on to find a customer. This is usually used where two people with different names share a same address.

To delete a customer, edit the customer record then from the Process Menu pick Delete Customer Record. Customers may be deleted only if they do not have any orders or payments.

Exit will go back to the initial search screen.

Adding Customer Picture: You have the ability to attach a customer picture to the customers record and any Loyalty card that is printed from it. Double click on the customer picture box and you will be able to navigate to the file you have your customer pictures and double click on the picture and it will automatically be attached. The customer picture should be 86x113 pixels. Note: VinNOW does not have picture taking capabilities, you need to take the picture and then save it to a file. If you backup to a CD you must backup the "Image" file manually. The auto backup process only backs up the data base. If you backup over your network, all files are copied.

Removing Customer Picture: By double clicking on the image and entering "none" in the file name box and choosing "open" the picture will disappear.