



Opening- Every Day upon Opening of Office Hours

Registers need to be opened and closed daily, and the money needs to be counted and verified, even if there was no sale on a given day.

1. Count your cash drawer. Indicate the amount of cash in the drawer at the time of opening.
2. Tap “Open Register.”
3. Type it into the space “Opening float.” Add any notes that may be helpful to you.
4. Tap “Set Opening Float.”

Closing- Every Day upon Close of Office Hours

Registers need to be opened and closed daily, and the money needs to be counted and verified, even if there was no sale on a given day.

1. Tap on the hamburger menu in the upper left of the screen.
2. Select “Close Register.”
3. Count your cash drawer, and indicate the amount of cash in the drawer at the time of closing the register and type it into the space for each payment type under the column headings heading “Counted (\$)”.

Note: We do not offer store credits, so this field should always be 0.

4. You will see the last column on the far right will automatically indicate if there are any overages or shortages. If there are, prior to completing the close, recount the money and inform your manager or DC. Indicate anything that may have caused the discrepancy in the note field.
5. Tap the “Close Register” button.
6. You will be taken to a Register Closure Summary. Print the report and turn the report and the cash over to your manager/DC, or secure it.



Making a Sale

1. Tap on the hamburger menu on the upper left to expand it.
2. Tap "Sell Screen."
3. If you need to add a customer, tap the arrow on the top right.
4. Either search for the customer using the top search bar, or tap "Add a New Customer."
5. Fill out the customer's name and customer group and then tap "Create."

Note: If paying by a business check, include the Company name. Phone and email are optional. Indicate if it is a 4H club, if they are tax exempt, and Registrations by "Child's name"

6. To select a product, tap the appropriate key or use the search field by typing in a key word. Once an item is selected, it moves to the right of the screen onto the receipt. If you tap the item on the right, it expands so you can adjust quantities.
7. Tap the "Pay" button after you have added all desired products, quantities, and notes.

Note: If it is a tax exempt sale, there will be a spot later to add that info.

8. Use the buttons to select the tender type. If cash, type in the amount of cash you are given.

Note: To make a split payment (using more than one payment methods) tap the "Pay" button. Change the amount of payment to the amount paid under the first payment type, and select the payment type. The remaining balance will be left and you can then select the second payment type. Create a note indicating the amounts paid under each payment type.

9. In the Add note to sale screen, add the appropriate note, depending on the type of note, then tap "Add note." See the chart for appropriate use of the notes field.

If it is a payment being made by one person on behalf of another, indicate in the notefield:	If it is a payment being made for anything else:
<ul style="list-style-type: none"> • CASH – "CASH PAYMENT FOR (PARTICIPANTS FIRST AND LAST NAME)" • CHECK – "CHECK #1234 FOR (PARTICIPANTS FIRST AND LAST NAME)" • CREDIT CARD – "(VISA/MC/AMEX) Cardholder name FOR (PARTICIPANTS FIRST AND LAST NAME)" 	<ul style="list-style-type: none"> • CASH – no need for a note/leave blank • CHECK – "CHECK #1234" • CREDIT CARD – "(VISA/MC/AMEX) (Cardholder name)"

10. Tap "Print Receipt" and give the receipt to your customer.



Making a Tax-Exempt Sale

If you are making a sale to an organization that is tax-exempt, such as a nonprofit organization, you will need their tax ID. Make sure you have that before proceeding with the instructions below.

1. Ring up the sale per normal process, until you get to the screen where you normally tap on "Pay."
2. In this screen, tap on the blue "Tax (MI Sales Tax)" link. Change the toggle to turn it off.
3. Tap the Pay button and proceed with the sale.
4. In the Notes field, add a note that includes the Tax ID of the buyer and then tap "Save note."

Edit a Note in the System

If you need to add or fix a note on a sale, you can do that through finding the sale in the Sales Ledger and editing it.

1. Using the hamburger menu in the upper left, tap on "Dashboard."
2. Use lower hamburger menu to open up more options.
3. Select "Sales Ledger."
4. Tap on the Receipt link for the appropriate sale.
5. Select "Edit Sale."
6. In this window, you can edit the notes and then add your Reason for Edit, and then tap on Save.

SET UP QUICK KEYS:

Quick keys are shortcuts to products that facilitate the selling process.

1. Using the hamburger menu in the upper left, you will expand the menu. Tap "Settings."
2. Tap "Quick Keys" and then "New layout".
3. Name your layout and then tap "Create."
4. Edit the layout you just added by tapping "Edit."
5. Click on the new layout and select "Modify layout."
6. Use the search box in the upper left to find and then add products for which you want a quick key.
7. Tap a quick key to bring up options to change the name or the color of the quick key.
8. Drag one quick key onto another one to create a folder with multiple quick keys in it.
9. You will now see your new quick keys in the sell screen.



Runs Sales Revenue Report (Desktop):

PLEASE RUN REPORTS FROM THE DESKTOP APPLICATION, AS YOU WILL NEED TO PRINT THE REPORTS. www.vend.hq.com. A Sales Revenue and Sales Payment report are each run for each 2-week reporting period. After running and printing these reports, they need to be signed by the District Coordinator and mailed to the business office, along with the checks.

Make sure you are in accessing Vend via www.vend.hq.com.

1. Click on "Reporting" button on far left side of screen, yellow graph icon.
2. Select "Sales Report" from the second column. Under Report Type, select "Tag" from the dropdown menu.
3. Under Measure, select "Revenue" from the drop down menu.
4. Under Date Range, select your date range. It should be run twice monthly. Once covering the 1st – 15th and later covering the 16th – end of the month.
5. Select "Show Products."
6. Click on the "Filter" button. In the field, type in the name of your county and select your register.
7. Hit Enter. Print the screen.

Run Sales Payment Report (Desktop):

PLEASE RUN REPORTS FROM THE DESKTOP APPLICATION, AS YOU WILL NEED TO PRINT THE REPORTS. After running and printing these reports, they need to be signed by the District Coordinator and mailed to the business office, along with the checks.

Make sure you are in accessing Vend via www.vend.hq.com.

1. Select "Payments Report" from second column from far left. This report shows how payments were received. It should be run twice monthly. Once covering the 1st – 15th and later covering the 16th – end of the month.
2. Under Report Type, select "Payment Type" from the dropdown menu.
3. Under Measure, select "Amount" from the drop down menu.
4. Under Date Range, select your date range.
5. Click on the "Filter" button.
6. In the field, type in the name of your county and select your register.
7. Hit Enter.
8. Print the screen.