



Vendors+

FREQUENTLY ASKED QUESTIONS

A photograph of a retail employee with curly hair, wearing a white shirt and a dark blue apron, standing at a counter and interacting with a large touchscreen POS system. The background is a blurred retail store environment. The image is overlaid with a dark purple semi-transparent banner on the left side containing text and a logo.

Gain Visibility Into Your Vendors and Incoming Inventory Orders with

Vendors+

Robust vendor management system that allows you to **create, receive, and track orders**, all seamlessly synced with your POS and inventory.



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Purchase Orders

Q: How to Duplicate Purchase Orders?

A: The **Vendors Plus** module includes a feature that lets you quickly duplicate previous purchase orders. This saves time and minimizes errors when placing new orders. This function is particularly helpful if you frequently reorder the same products or work with regular vendors.

To duplicate a purchase order:

1. Navigate to the **Vendors Plus** module.
2. Select the previous purchase order you want to duplicate.
3. Click on **Duplicate** to create a new order with the same details.
4. Review the order and make any necessary changes.
5. Submit the duplicated order.

This feature simplifies your ordering process and ensures consistency when dealing with frequent or repeat orders.



Q: How does Vendors Plus integrate with my store's Inventory Management?

A: When you receive a purchase order in **Vendors Plus**, the products from that order are automatically added to your store's inventory. This integration ensures that your stock levels are updated in real-time without the need for manual entry, making inventory tracking more accurate and efficient.

Q: How does Vendors Plus integrate with Pricebook Management?

A: Vendors Plus is integrated with **Pricebook Management**, enabling seamless two-way communication between the two systems.

- When creating a purchase order in Vendors Plus, if a cost for the product already exists in Pricebook Management, it will automatically populate in the purchase order.
- If no cost is entered in Pricebook Management, you can assign a cost within the purchase order, and that cost will be updated in the Pricebook system automatically.

This integration ensures pricing accuracy and keeps both systems up-to-date.

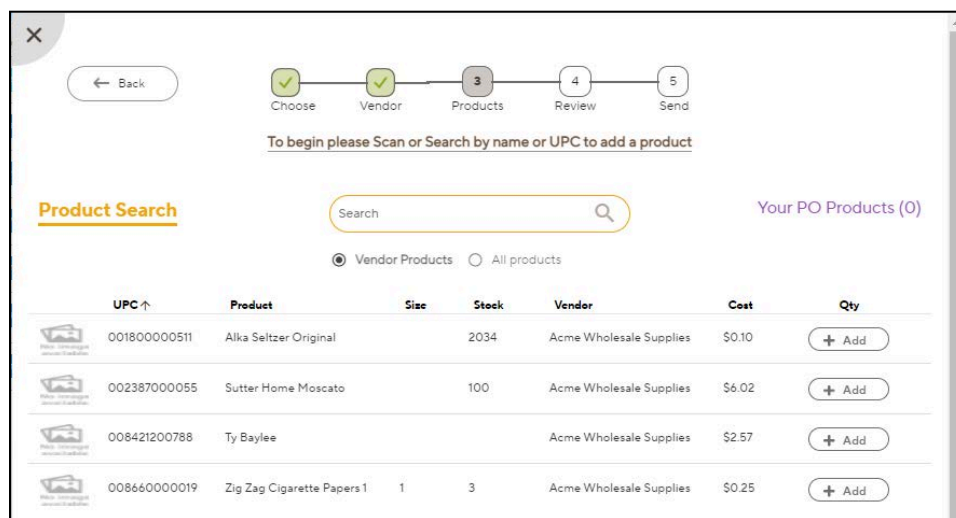
Linked Products

Q: What is a Linked Product in Vendors Plus?

A: The **Linked Products** feature in Vendors Plus helps you streamline the ordering process by automatically linking products to the vendors from whom you've previously ordered them.

- When you create a purchase order, the system links the products in that order to the vendor.
- For future orders, you can easily view and select the same products for that vendor, ensuring consistency.
- Additionally, Linked Products help ensure you get the correct wholesale price, as the cost for each product will match the vendor's cost listed in your Pricebook.

To use this feature, simply create a new purchase order, select your vendor, and you'll see a list of all the products linked to them.



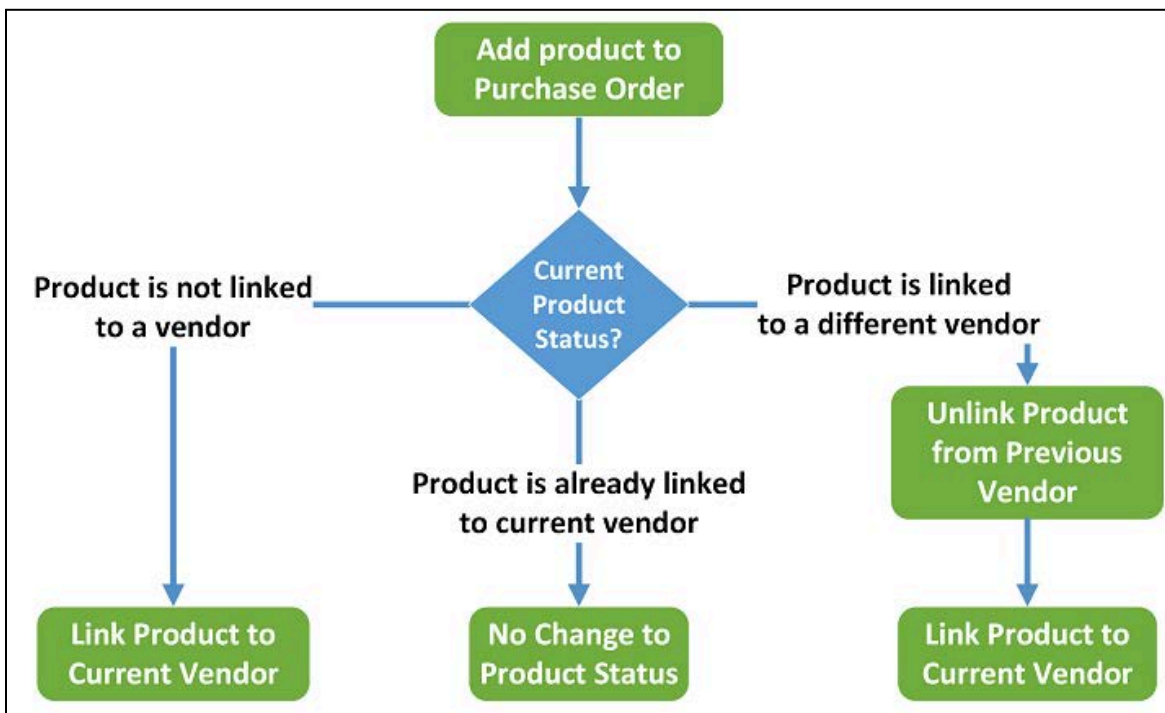
Linked Products Workflow

Q: What happens when I add a product to a Purchase Order in Vendors Plus?

A: When a product is added to a Purchase Order, its link to a vendor is managed as follows:

- **If the product was not previously linked to a vendor**, it is automatically linked to the vendor in the current Purchase Order.
- **If the product is already linked to the current vendor**, no changes are made to the product's status.
- **If the product was linked to a different vendor**, it will be unlinked from the previous vendor and linked to the current vendor in the Purchase Order.

This ensures that your product-vendor relationships remain accurate and up-to-date for future orders.



Licensing and Permissions

Q: How can I access the Vendors Plus feature in the NRS POS system?

A: Vendors Plus is a premium feature of the NRS POS system, available with either the **Pro** or **Advanced** POS plans. It provides enhanced tools for managing vendors, inventory, and purchase orders.

- **Pro or Advanced plan customers:** You can fully access Vendors Plus and all its features.
- **Basic plan customers:** While you cannot use Vendors Plus, you will still see the Vendors Plus tile on the Merchant Portal homepage. Clicking on it will redirect you to the old vendor management page, where you'll see an option to upgrade your license to access Vendors Plus.

Upgrading to a Pro or Advanced plan unlocks the full functionality of Vendors Plus for more efficient vendor and purchase order management.

Q: What are the user permissions for accessing Vendors Plus?

A: In the initial version of Vendors Plus:

- **Admin and manager users:** Have full access to all features of Vendors Plus.
- **Cashier users:** Do not have access to Vendors Plus.

Currently, these access levels cannot be modified. However, permissions configuration is planned for **Vendors Plus version 1.1**, allowing greater control over user access.

User Interface

Q: How do I access Vendors Plus in the NRS systems?

A: To access **Vendors Plus**, follow these steps:

1. Log in to your **Merchant Portal**. Or open your NRS POS
2. On the main dashboard, locate the **Vendors Plus** tile.
3. Click on the Vendors Plus tile. This will open a new tab, displaying the Vendors Plus homepage.

From there, you can begin managing your vendors, inventory, and purchase orders.

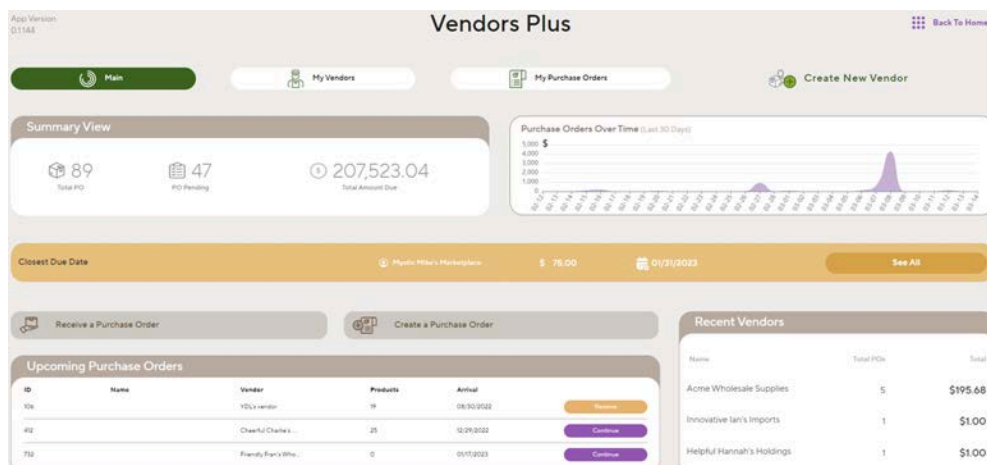


Q: What elements will I find on the Vendors Plus homepage?

A: The Vendors Plus homepage is organized with four main elements:

1. Navigation Buttons: These buttons help you move between different pages within the Vendors Plus system.
2. Action Buttons: Use these to perform tasks like creating or receiving a purchase order.
3. Upcoming Purchase Orders: This section gives you an overview of all pending purchase orders, so you can track expected deliveries.
4. Recent Activity: A summary of your most recent purchase orders, providing a quick view of your order history.

These elements make it easy to navigate and manage your vendor-related activities efficiently.



Q: What navigation buttons are available on the Vendors Plus homepage?

A: At the top of the **Vendors Plus** homepage, you'll find the following navigation buttons:

- **Main:** Takes you back to the Vendors Plus homepage.
- **My Vendors:** Opens the **My Vendors** screen for managing your vendors.
- **My Purchase Orders:** Directs you to the **My Purchase Orders** screen, where you can manage your purchase orders.

Additionally, the **See All** button in the **Closest Due Date** section opens a **Payments** pop-up screen, allowing you to view payment details.

Q: What actions can I perform using the action buttons on the Vendors Plus home screen?

A: The following action buttons are available to help you manage purchase orders and vendors:

- **Create a Purchase Order:** Starts the workflow for creating a new purchase order.
- **Receive a Purchase Order:** Initiates the process for receiving a purchase order.
- **Create New Vendor:** Opens a form where you can enter details for adding a new vendor to Vendors Plus.

Q: What information is shown in the Upcoming Purchase Orders section, and how do I use it?

A: The **Upcoming Purchase Orders** section displays all purchase orders that are pending delivery.

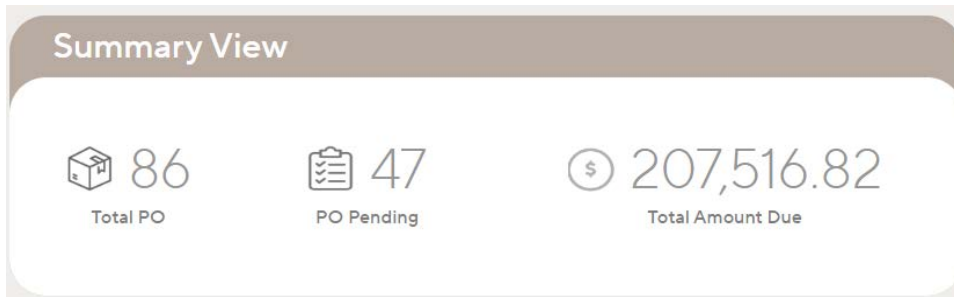
- To mark a purchase order as received, click the **Receive** button next to the relevant order. This will take you to the **Receive a Purchase Order** screen, where you can confirm the order's receipt.

Q: What information is shown in the Recent Activity section on the Vendors Plus homepage?

A: The **Recent Activity** section on the Vendors Plus homepage provides a quick glance at your recent vendor and purchase order actions. It includes the following tiles:

- **Summary View:** An overview of your recent activities.
- **Recent Vendors:** A list of vendors you've recently interacted with.
- **Purchase Orders Over Time:** A timeline view showing your purchase order activity over a specific period.

Summary View



Q: What does the Summary View tile on the Vendors Plus homepage show?

A: The **Summary View** tile provides a 12-month overview of key metrics related to your purchase orders. It includes the following fields:

- **Total PO:** The total number of purchase orders you've created.
- **PO Pending:** The number of purchase orders that are still pending delivery.
- **Total Amount Due:** The combined total amount due for both pending and received purchase orders.

Recent Vendors

The Recent Vendors tile displays a table with three columns: Name, Total POs, and Total. The table lists three vendors: Innovative Ian's Imports, Helpful Hannah's Holdings, and Bold Bill's Bulk Buys, each with 1 Total PO and a Total of \$1.00.

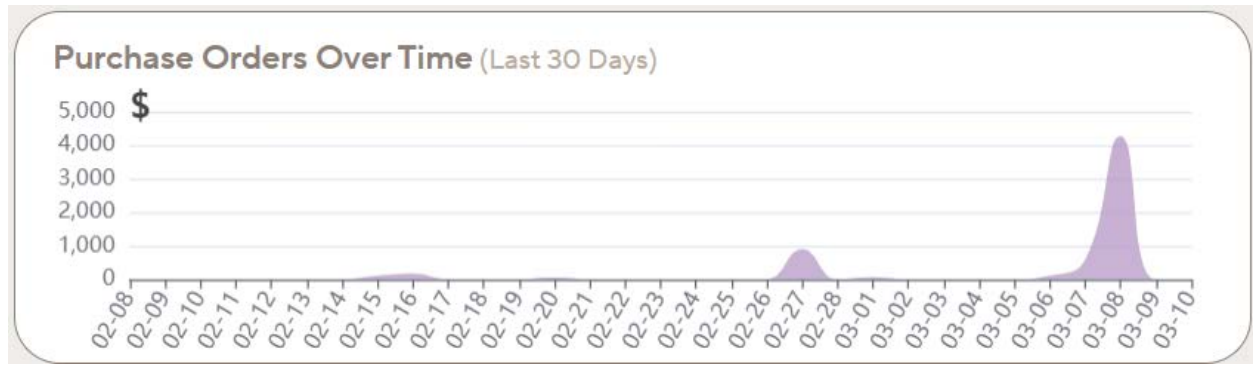
Name	Total POs	Total
Innovative Ian's Imports	1	\$1.00
Helpful Hannah's Holdings	1	\$1.00
Bold Bill's Bulk Buys	1	\$1.00

Q: What does the Recent Vendors tile on the Vendors Plus homepage show?

A: The **Recent Vendors** tile displays a list of vendors you have most recently ordered from. It includes the following fields:

- **Name:** The name of the vendor.
- **Total POs:** The total number of purchase orders you've placed with that vendor.
- **Total:** The total dollar value of all purchase orders made for that vendor.

Purchase Orders Over Time



Q: What information is displayed in the Purchase Orders Over Time tile on the Vendors Plus homepage?

A: The **Purchase Orders Over Time** tile shows a graph representing the total dollar value of purchase orders you've placed over the past 30 days. This visual helps you track your purchasing trends and monitor order activity over the recent month.

Payments Pop-Up Screen

The Payments pop-up screen has two tabs.

- Payments Due
- Payments History

Q: What does the Payments Due tab display, and how do I use it?

A: The **Payments Due** tab shows a list of purchase orders that are currently due for payment.

- To view the details of a specific purchase order, click on any line in the **Payments Due** screen. This will open the purchase order in the **Purchase Order View** screen for further action.

The screenshot shows the 'Payments Due' tab of a pop-up screen. It features a table with columns for PO ID, PO Name, Vendor, Contact, Amount, and Due Date. Each row includes a 'Mark as Paid' button. The first row is selected, indicated by a red circle next to the PO ID 1298.

PO ID	PO Name	Vendor	Contact	Amount	Due Date	
1298		Radiant Rachel's Resources	bmaz 3 contact	\$2.00	03/19/2023	Mark as Paid
1309		kw1		\$0.10	03/19/2023	Mark as Paid
1291		Kellogg's	Mr Kellogg's	\$4.00	03/26/2023	Mark as Paid
1299		Radiant Rachel's Resources	bmaz 3 contact	\$2.00	03/19/2023	Mark as Paid

Q: What steps do I need to follow to mark a purchase order as paid in Vendors Plus?

A: To mark a purchase order as paid, follow these steps:

1. Click on the **Payments Due** tab to view the list of purchase orders due for payment.
2. Select the purchase order you wish to mark as paid.
3. Click on the option to enter a payment against the purchase order. This will open a dialog box for you to input payment details.

PO no. 1298

Amount

Method

4. Enter the payment amount, select the payment method, and click on Confirm.

PO no. 1298

Amount

Method

Payments History Tab

Q: What information is displayed in the Payments History tab?

A: The **Payments History** tab displays a list of previous payments made, organized in descending date order. This allows you to easily review your past payment activities and track your financial transactions over time.

	PO ID	PO Name	Vendor	Contact	Amount	Method	Date ↓
<input type="radio"/>	1284		Acme Wholesale Supplies	Aaron Airdale	\$100.00	Cash	03/12/2023
<input type="radio"/>	1176	Rice Vinegar	David's Dogfood Supplies	udi	\$20.00	Cash	03/08/2023
<input type="radio"/>	1254		Creative Chris's Collectibles		\$45.00	Cash	03/08/2023
<input type="radio"/>	1162		Barry's Wholesale Supplies		\$0.10	Credit Card	03/05/2023

Q: How can I see the details of a payment in the Payments History tab?

A: To view the details of a specific payment in the **Payments History** tab, simply click on any line in the **Payments History** screen. This action will open a pop-up dialog box displaying the detailed information for that payment.



The screenshot shows a 'Payment Details' dialog box with the following information:

Amount	\$100.00	Method	by Cash	Date	03/12/2023
PO ID	1284	Time			2:38 PM
PO Name	-				
Vendor Name	Acme Wholesale Supplies				
Contact Name	Aaron Airdale				
Employee	-				
Terminal	-				

There is also a 'Notes' field which is currently empty.

My Vendors Screen

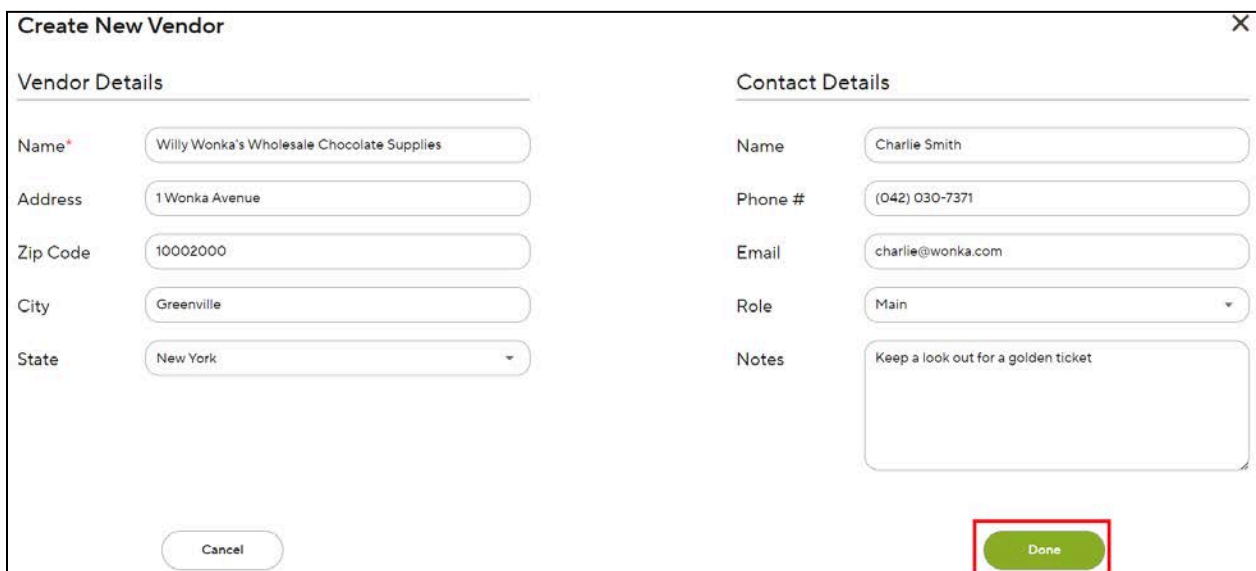
Q: How can I create or update vendor details in the Vendors Plus system?

A: You can create new vendors and update the details of existing vendors from the **My Vendors** screen. To navigate to the **My Vendors** screen, click on the appropriate button or link in the Vendors Plus interface.

Create New Vendor

Q: How can I add a new vendor in the Vendors Plus system?

A: To create a new vendor in Vendors Plus, click on the **Create New Vendor** button. This action will open the **Create New Vendor** form, where you can enter all the necessary details for the new vendor.



The screenshot shows the 'Create New Vendor' form, which is divided into two sections: 'Vendor Details' and 'Contact Details'.

Vendor Details:

- Name: Willy Wonka's Wholesale Chocolate Supplies
- Address: 1 Wonka Avenue
- Zip Code: 10002000
- City: Greenville
- State: New York

Contact Details:

- Name: Charlie Smith
- Phone #: (042) 030-7371
- Email: charlie@wonka.com
- Role: Main
- Notes: Keep a look out for a golden ticket

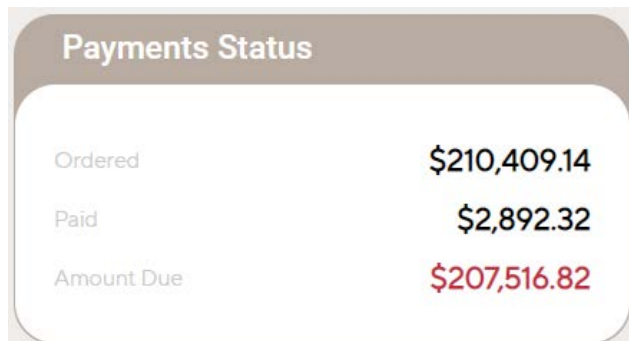
At the bottom of the form, there are two buttons: 'Cancel' and 'Done'. The 'Done' button is highlighted with a red box.

Q: What information do I need to provide when creating a new vendor in Vendors Plus?

A: When creating a new vendor, you must enter the vendor's details, including the vendor's name, as it is required to save the information. Once you have filled in the necessary fields, click **Done** to save the new vendor.

Recent Activity

Q: What information is displayed in the recent activity tiles on the My Vendors screen?



A: The **My Vendors** screen includes a **Payments Status** tile that provides a summary of all payment activity over the last 30 days. This tile shows the following fields:

- **Ordered:** The total dollar value of all purchase orders made.
- **Paid:** The total amount paid for all purchase orders.
- **Amount Due:** The total currently due, calculated as the total value of all purchase orders minus the total paid.

Q: What does the Payments (last 30 days) graph display on the My Vendors screen?

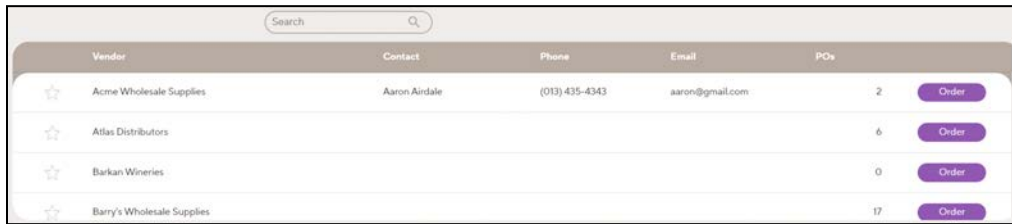
A: The **Payments (last 30 days)** graph illustrates the total dollar value of purchase order payments made over the past 30 days. This visual representation allows you to easily track your payment trends and monitor your financial activities related to vendor orders.



Vendors Table

Q: What information can I find in the Vendors Table on the My Vendors screen?

A: The **Vendors Table** displays a list of all vendors whose details you have entered into Vendors Plus. This table allows you to easily view and manage your vendor information, making it convenient to access details for each vendor as needed.



Vendor	Contact	Phone	Email	POs	
Acme Wholesale Supplies	Aaron Airdale	(013) 435-4343	aaron@gmail.com	2	Order
Atlas Distributors				6	Order
Barkan Wineries				0	Order
Barry's Wholesale Supplies				17	Order

Search

Q: How can I find a specific vendor in the Vendors Table on the My Vendors screen?

A: To search for a particular vendor, enter the desired text into the **search box**. The text you input will search across all fields in the table.

For example, if you enter "31" into the search box, it will match vendors such as **David's Dogfood Supplies**, which has had 31 purchase orders, as well as **Dell and Co**, where the number 31 appears in the phone number. This feature helps you quickly locate vendors based on various criteria.



Vendor	Contact	Phone	Email	POs	
David's Dogfood Supplies	udi	123460		31	Order
Dell and Co vendor	HONIGSTEIN Samuel	(077) 786-9331		2	Order

Q: How can I sort the vendors in the Vendors Table on the My Vendors screen?

A: To sort the vendors in the **Vendors Table**, simply click on any column heading.

- The first click will sort the data in that column in ascending order.
- A second click will sort the data in descending order.

Viewing Vendor Details

Q: How can I access and edit the details of an existing vendor in the Vendors Plus system?

A: To view and update the details of an existing vendor, click on the vendor's name in the vendor list. This action will open the **Vendor View Screen**, where you can see the vendor's information and make any necessary updates.

Vendor View Screen

Q: What sections can I find on the Vendor View Screen in Vendors Plus?

A: The **Vendor View Screen** provides a comprehensive overview of a specific vendor and contains the following sections:

- **Action Buttons:** Includes options for **Receive PO** and **Create PO**, allowing you to manage purchase orders directly from the vendor view.
- **Address and Contact Information:** Displays the vendor's address and contact details for easy reference.
- **Summary Section:** Shows key metrics such as **Total Purchase Orders** and **Total Purchases** over the last 12 months.
- **Payment Status:** Provides the outstanding balance for purchase orders made with this vendor.
- **Purchase Orders Table:** Lists all purchase orders that have been made from this vendor, giving you a detailed purchase history.
- **Linked Products:** Displays a list of all products linked to the vendor, indicating items that have been previously ordered.

Vendor View

Acme Wholesale Supplies

[Receive PO](#) [Create PO](#)

Total Purchase Orders (Last 12) **2** Total Purchases (Last 12) **\$89.46**

Address **3 Acme Street, Acme City, NY, 1020304**

Contact **Aaron Airdale** Email **aaron@gmail.com**

Phone **(013) 435-4343** Role **Main**

Payment Status (Last 30 days)

Ordered	Paid	Amount Due
\$89.46	\$0.00	\$89.46

Purchase Orders

ID ↓	Status	Name	Date Created	Products Ordered	Products Received	Estimated Delivery	Arrival Date	Total Cost
<input type="checkbox"/>	1224 Pending		03/06/2023	23	0			\$86.65
<input type="checkbox"/>	1220 Pending		03/06/2023	3	0			\$2.81

Linked Products [Link a new product](#)

UPC	Name	Department	Size	Stock	Cost
001457006492	6 Clasp Envelopes 9x12 inch	7UP			\$2.17
001800000511	Alka Seltzer Original	7UP			\$0.10
002387000055	Sutter Home Moscato	7UP			\$6.02

[View All](#)

Q: What action buttons can I use in the Vendor View Screen, and what do they do?

A: The **Vendor View Screen** includes the following action buttons:

- **Receive a Purchase Order:** Click this button to navigate to the **Receive a Purchase Order** screen. The purchase orders displayed will be filtered to match the vendor you are viewing. For more information, see the section on **Receiving a Purchase Order**.
- **Create a Purchase Order:** Click this button to go to the starting screen for creating a new purchase order, with the vendor you opened in the Vendor View Screen already preselected. For further details, refer to the section on **Creating a Purchase Order**.

Vendor Address and Contact Information

Q: How can I view and update a vendor's contact information in the Vendor View Screen?

A: The **Address and Contact Information** section allows you to view and edit a vendor's contact details. To update the contact information, click on the **pencil icon** next to the specific vendor detail you wish to edit. This action will open that detail for editing.

Acme Wholesale Supplies		★	Receive PO	Create PO
Total Purchase Orders (last 1Y)	2	Total Purchases (last 1Y)	\$89.46	
Address	3 Acme Street, Acme City, NY, 1020304			✎
Contact	Aaron Airdale	Email	aaron@gmail.com	✎
Phone	(013) 435-4343	Role	Main	✎

Summary Section

Payment Status	Ordered	Paid	Amount Due
(Last 30 days)	\$89.46	\$0.00	\$89.46

Q: What details can I find in the Summary section regarding a vendor's outstanding balance?

A: The **Summary section** displays key financial information related to the vendor's outstanding balance for purchase orders. It includes the following fields:

- **Ordered:** The total dollar value of all purchase orders made for this vendor.
- **Paid:** The total amount that has been paid to the vendor.
- **Amount Due:** This is calculated as **Total Ordered** minus **Total Paid**, providing you with the total amount owed to this vendor.

Purchase Orders Table

ID ↓	Status	Name	Date Created	Products Ordered	Products Received	Estimated Delivery	Arrival Date	Total Cost
<input type="checkbox"/>	1224	Pending	03/06/2023	23	0			\$86.65
<input type="checkbox"/>	1220	Pending	03/06/2023	3	0			\$2.81

Q: What can I find in the Purchase Orders Table on the Vendor View Screen?

A: The **Purchase Orders Table** displays the three most recent purchase orders for the current vendor.

To view the details of a specific purchase order, click on any line in the **Purchase Orders Table**. This action will open the **Purchase Order View** screen for that particular purchase order, allowing you to review its details and history.

Linked Products Table

Linked Products						Link a new product
UPC	Name	Department	Size	Stock	Cost	
001800000511	Alka Seltzer Original	7UP			\$0.10	
002387000055	Sutter Home Moscato	7UP			\$6.02	
008421200788	Ty Baylee	13 Toys			\$2.57	

[View All](#)

Q: What details can I find in the Linked Products Table on the Vendor View Screen?

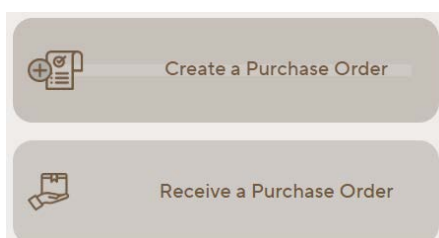
A: The **Linked Products Table** displays the three most recent products linked to the current vendor.

- To view a complete list of all linked products, click on the **View All** button.
- If you want to link a new product to the vendor, click on the **Link a New Product** button.

My Purchase Orders Screen

The **My Purchase Orders** screen contains the following elements.

Action Buttons



The action buttons in the **My Purchase Orders** screen allow you to create and receive purchase orders, these buttons have the same functionality as the equivalent buttons in the Vendors Plus homepage, see [Vendors Plus Homepage → Action Buttons](#) for more information.

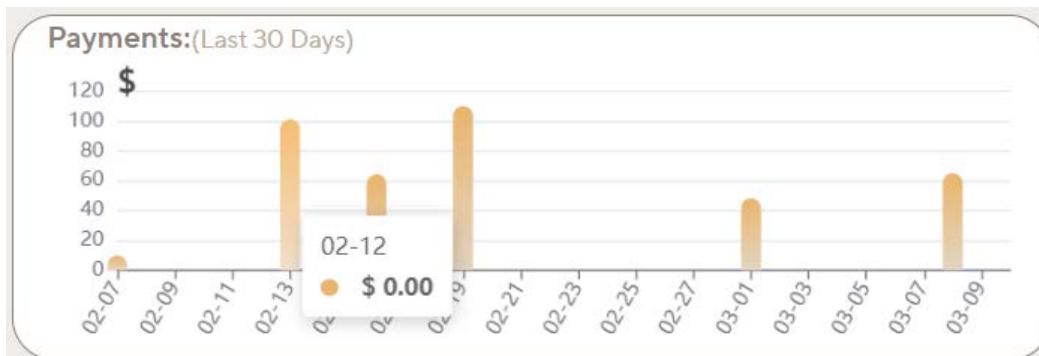
Recent Activity

The **My Purchase Orders** screen includes the following recent activity tiles.

- **This Week's Activity:** A summary of purchase orders made this week.

This Week's Activity		
PO Status	Amount	Total
Ordered	15	\$5,172.89
Pending	9	\$3,311.89
Received	6	\$1,861.00

- **Payments (last 30 days):** A graph showing the dollar value of purchase order payments made over the last 30 days.



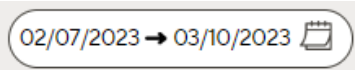
Purchase Orders Table

The **Purchase Orders Table** lists purchase orders made in a given date range.

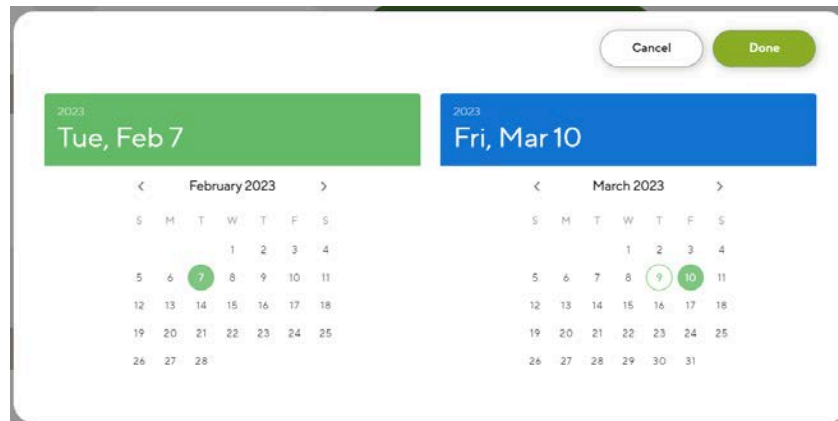
ID	Status	Name	Date Created	Vendor	Contact	Products Ordered	Estimated Delivery
1275	Pending		03/12/2023	Acme Wholesale Supp...	Aaron Airdale	1	
1262	Received		03/08/2023	Innovative Ian's Im...		1	03/31/2023
1261	Pending		03/08/2023	Helpful Hannah's Ho...		1	03/15/2023

Changing the Date Range

You can change the date range for which purchase orders are displayed by clicking on the date

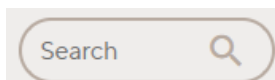
range button: 

Select the **From** and **To** dates to select the start and end dates of the date range, then click **Done**.



Search

You can search for specific purchase orders by entering text in the search box,



Text entered in the search box searches across the following fields:

- ID
- Status
- Name
- Vendor
- Contact
- Products Ordered

Sorting the Purchase Orders Table

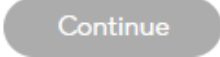


Click on any column heading to sort by that column. One click will sort by that column ascending, a second click will sort by that column descending.

View Details for a Purchase Order

To view the details for a purchase order, click on the purchase order in the Purchase Orders table. This will open the purchase order in the **Purchase Order View** screen.

Purchase Orders Table Action Buttons

The last column in the Purchase Orders table allows you to perform actions on the purchase order, depending on the current state of the purchase order.

	<p>The Continue button is available for purchase orders that are in draft status, i.e. the purchase order is not completed.</p> <p>Clicking on this button opens the Review And Confirm Purchase Order screen, allowing you to complete the purchase order.</p>
	<p>The Receive button is available for purchase orders in pending status, i.e. the purchase order has been completed but not received.</p> <p>Clicking on this button opens the Receive a Purchase Order screen, allowing you to receive the purchase order.</p>
	<p>The Duplicate button is available for purchase orders that have been received.</p> <p>Clicking on this button opens a duplicate of the purchase order in the Review And Confirm Purchase Order screen, allowing you to make a repeat purchase order for the same vendor with the same products.</p>

Workflow

Adding Vendors to Vendors Plus

Before you can create a Purchase Order, you need to enter the details of the vendor you want to order from into Vendors Plus.

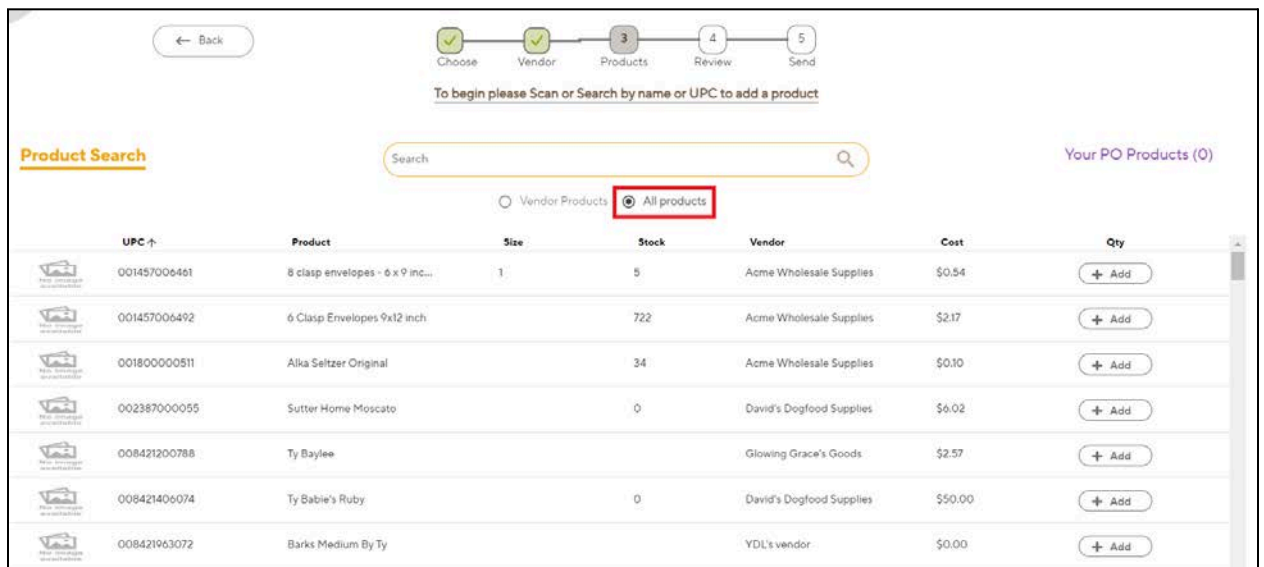
- See [Create New Vendor](#) for instructions on adding vendors.
- See [Vendor Address and Contact Information](#) for instructions on updating the address and contact information for a vendor.


Creating a New Purchase Order

Q: What steps do I need to follow to create a new purchase order?

A: To create a new purchase order, follow these steps:

1. On the **Vendors Plus** home screen, click on **Create a Purchase Order**.
 - **Note:** You can also access the **Create a Purchase Order** button from the **Vendor View Screen** and the **My Purchase Orders** screen.
2. Click on **Create a New PO**.
3. Select the vendor you want to order from, then click **Next**.
4. If you have previously purchased from this vendor, you will see a list of products that you have ordered before. If this is your first time ordering from this vendor, you will see a list of all products available in your pricebook.



5. To add a product to the purchase order, click .
6. Change the quantity by using the plus and minus signs, or type in the number you want.



7. Once you have selected the required quantity, you must click the plus sign to confirm your selection.

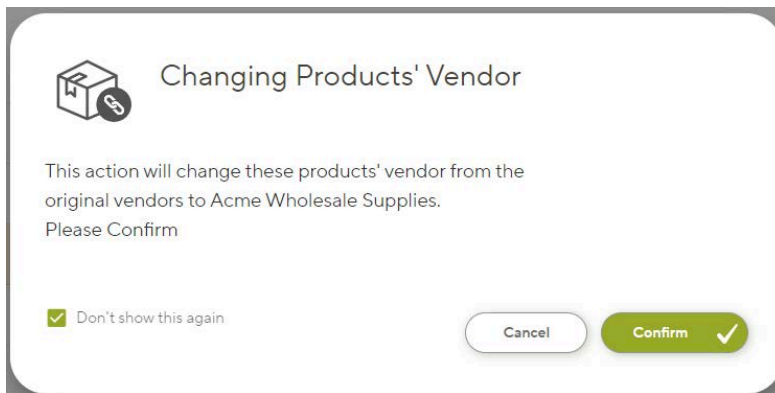


8. Continue adding products to your purchase order until you have added everything you want to order.

Q: What should I do if I see a pop-up confirmation when adding products to a purchase order for the first time?

A: If this is your first time ordering these products from this vendor, you will see a confirmation pop-up.

- If you do not wish to receive this confirmation for every product you add from this vendor, tick the option **“Don’t show this again”**, then click **Confirm** to proceed.
- If you click **Cancel**, this will cancel the addition of the product to the purchase order, as all products in a purchase order must be linked to the vendor from which you are ordering.



Step 4 PO Overview

← Back

✓ Choose
✓ Vendor
✓ Products
4
5

Create ✓

Please Review And Confirm The Following Purchase Order

Purchase Order no. NA date **03/06/2023**
time **12:34 PM**
To Acme Wholesale Supplies (3 Acme Street) priority low
Contact Aaron Airdale

UPC	Product	Size	Stock	Qty Ordered	Quantity	Cost	Total
008421200788	Ty Baylee			10	2	\$ 5.14	\$ 25.70
008660000019	Zig Zag Cigarette Papers 1	1	3	3	1	\$ 0.25	\$ 0.75
002387000055	Sutter Home Moscato		0	10	1	\$ 6.02	\$ 60.20

Q: How can I modify the quantity ordered and set delivery and payment due dates in my purchase order?

A: To adjust the quantity and set dates in your purchase order, follow these steps:

1. To adjust the quantity ordered, change the number in the **Qty Ordered** field.
2. To set an estimated delivery date for the purchase order, enter the desired date in the **Estimated Delivery** field. For more information, see the **Purchase Order Timings** section.
3. To set a payment due date for the purchase order, enter the desired date in the **Payment Due Date** field. Additional details can be found in the **Purchase Order Timings** section.
4. After verifying that all purchase order details are correct, click the appropriate button to

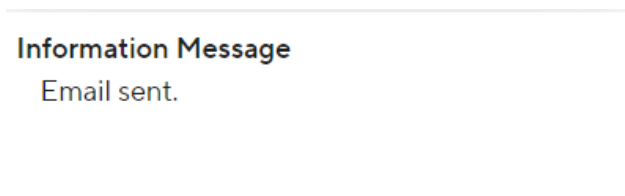
proceed. 



Step 5 You will now see the **Send Purchase Order** screen.

Q: What options do I have for handling my purchase order after creating it?

A: If you are using the **Merchant Portal**, you can take the following actions from the purchase order screen:

- **Email a PDF:** Click the appropriate button to email a PDF of the purchase order to yourself. The system will then display a confirmation message indicating that the email is being sent.



-  **Print:** You can print the purchase order directly from this screen.
-  **Download:** You have the option to download the purchase order for your records.

Draft Purchase Orders

Q: Does Vendors Plus allow me to save a draft version of my purchase order before finalizing it?

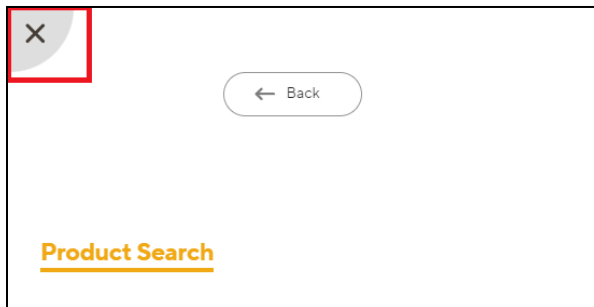
A: Yes, Vendors Plus allows you to save a draft version of a purchase order before it is finalized and sent to the vendor. This feature is particularly useful if you want to start creating a purchase order but are not yet certain about all the items you wish to order from the vendor.

Saving a Draft Purchase Order

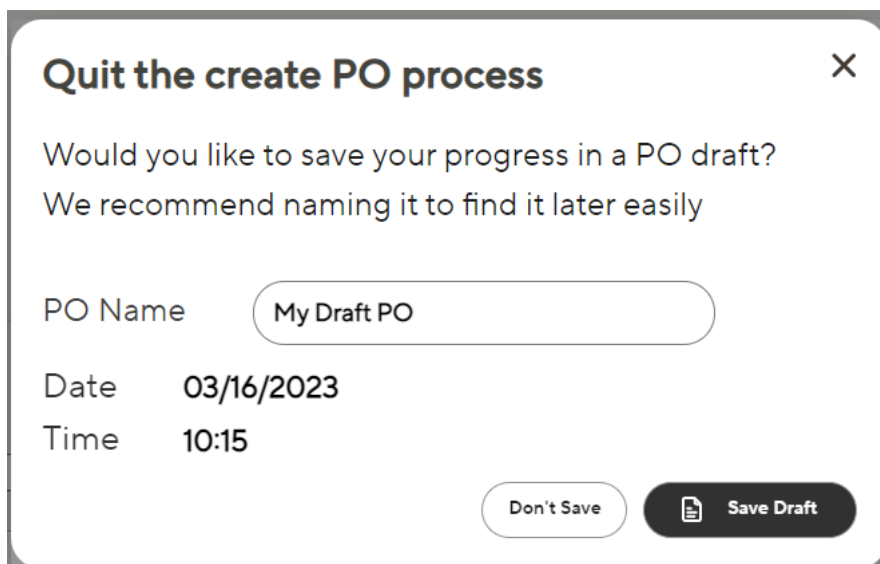
Q: What steps should I follow to save a draft of my purchase order in Vendors Plus?

A: To save a draft of your purchase order while in the process of creating it, follow these steps:

1. Start creating your purchase order as you normally would.
2. In either the **Product Search** screen or the **Review and Confirm Purchase Order** screen, click the **gray cross** located in the top left-hand corner of the screen.



3. (Optional) In the dialog box that appears, enter a memorable name for the draft purchase order.

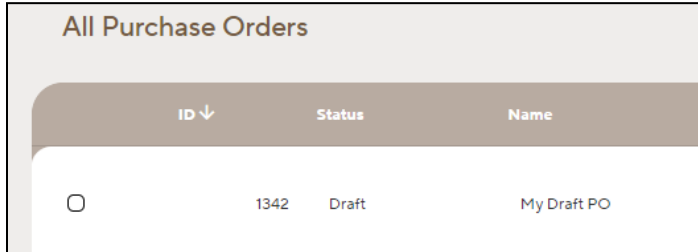


4. Click on **Save Draft**.

By doing this, your progress will be saved as a draft, allowing you to return and complete the purchase order later.

Q: Where can I find my draft purchase orders after saving them?

A: After you save a draft purchase order, you will see it listed in the **My Purchase Orders** screen.



ID ↓	Status	Name
1342	Draft	My Draft PO

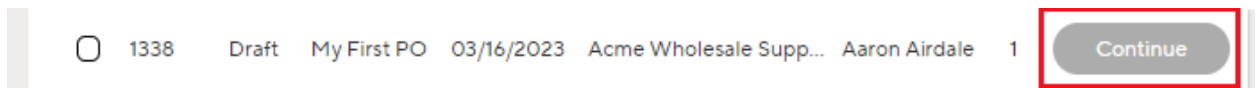
Note: If you create a purchase order and close the screen before finishing, a draft of what you've done so far will be automatically saved. The same applies if you make changes to a purchase order while receiving it and then close the screen. Your changes will be saved as a draft, allowing you to revisit and complete the purchase order later.

Reopening a Draft Purchase Order

Q: What steps do I need to follow to reopen a draft purchase order in Vendors Plus?

A: To reopen a draft purchase order, follow these steps:

1. Open the **My Purchase Orders** screen.
2. To open the draft purchase order in the **Purchase Order View** screen, click anywhere in the line of the draft.



3. In the **Purchase Order View** screen, you can continue working on the purchase order by clicking **Continue**.

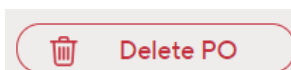
Deleting a Draft Purchase Order

Q: What steps should I follow to delete a draft purchase order in Vendors Plus?

A: To delete a draft purchase order, follow these steps:

1. Open the draft purchase order in the **Purchase Order View** screen (as described in the previous instructions).

2. Click on the **Delete** button.

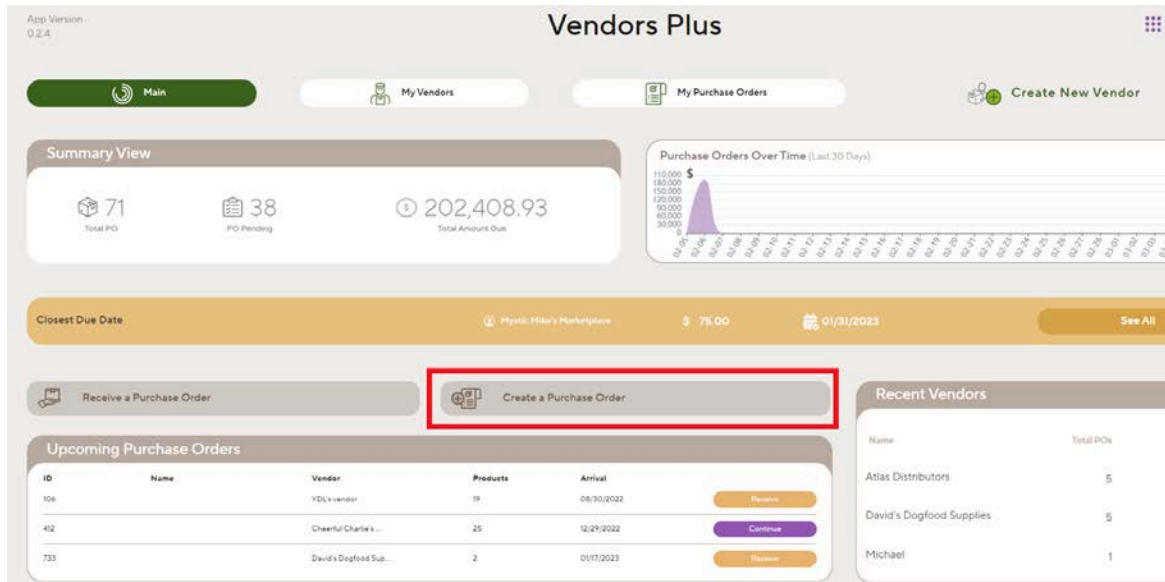


Copying a Purchase Order

Q: What steps should I follow to copy an existing purchase order in Vendors Plus?

A: To copy a purchase order, follow these steps:

1. On the **Vendors Plus** home screen, click on **Create a Purchase Order**.



2. Click **“Use an existing PO”**.



- Click the purchase order you want to copy from the list

ID ↓	Status	Name	Date Created	Vendor	Contact	Products Ordered
<input type="checkbox"/>	1232	Pending	03/06/2023	Unicorn Rainbow Sup...		10
<input type="checkbox"/>	1231	Draft	03/06/2023	David's Dogfood Sup...		10
<input type="checkbox"/>	1224	Pending	03/06/2023	Acme Wholesale Supp...	Aaron Airdale	23
<input type="checkbox"/>	1220	Pending	03/06/2023	Acme Wholesale Supp...	Aaron Airdale	3
<input type="checkbox"/>	1177	Received	03/01/2023	Atlas Distributors		14
<input type="checkbox"/>	1176	Received	03/01/2023	David's Dogfood Sup...		10

- Click



- You will be directed to the purchase order review step, skipping the product selection step, as the products will be imported from the previous purchase order.

UPC	Product	Size	Stock	Qty Ordered	Quantity	Cost	Total
010700804228	Zero Carmel Peanut regular 1.85 OZ	1.85 OZ		14	1	\$ 1.00	\$14.00

- If you want to adjust the quantity ordered, change the number in the **Qty Ordered** field.

- To set an estimated delivery date for the purchase order, enter a date in the **Estimated Delivery** field (see [Purchase Order Timings](#) for further information).

- To set a payment due date for the purchase order, enter a date in the **Payment Due Date** field (see [Purchase Order Timings](#) for further information).

- Check the purchase order is correct, then click



- This will take you to the **Send Purchase Order** screen, [as above](#).

Creating a Purchase Order from the Vendors Screen

Q: What steps should I follow to create a purchase order from the Vendors screen in Vendors Plus?

A: To create a purchase order from the Vendors screen, follow these steps:

1. Navigate to the **Vendors** screen by clicking on the appropriate option.
2. In the Vendors screen, scroll to the vendor you want to buy from, then click on **Order**.



Vendor	Contact	Phone	Email	POs	
☆ Barry's Wholesale Supplies				12	Order
☆ Bold Bill's Bulk Buys				0	Order
☆ Cheerful Charlie's Warehouse Supplies	Bill Smith	(952) 587-77	me@mail.com	29	Order

3. This will take you to a screen where you can choose to create a new purchase order or copy an existing purchase order.

Note: Regardless of which option you choose, the vendor you started from will be preselected. If you choose to create a new purchase order, you will skip the vendor selection screen. If you choose to copy an existing purchase order, you can only copy previous purchase orders from the selected vendor.

Purchase Order Timings

Q: What are the key timings I need to consider when creating a purchase order in Vendors+?

A: When creating a purchase order, there are two important timings to keep in mind:

1. **Payment Due Date:** This is the date by which the payment for the purchase order needs to be made. The payment due date is agreed upon between the merchant and the vendor.
2. **Estimated Delivery Date:** This is the date by which the supplier is expected to deliver the items ordered in the purchase order.

Both the Payment Due Date and the Estimated Delivery Date can be entered when creating the purchase order. Ensuring that these dates are accurate helps facilitate smooth transactions and timely deliveries.

Purchase Order no. **NA**
 To **Acme Wholesale Supplies** (3 Acme Street)
 Contact **Aaron Airdale**

UPC	Product
001800000511	Alka Seltzer Original

Estimated delivery

Payment Due Date

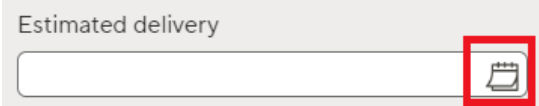
PO Name

Added

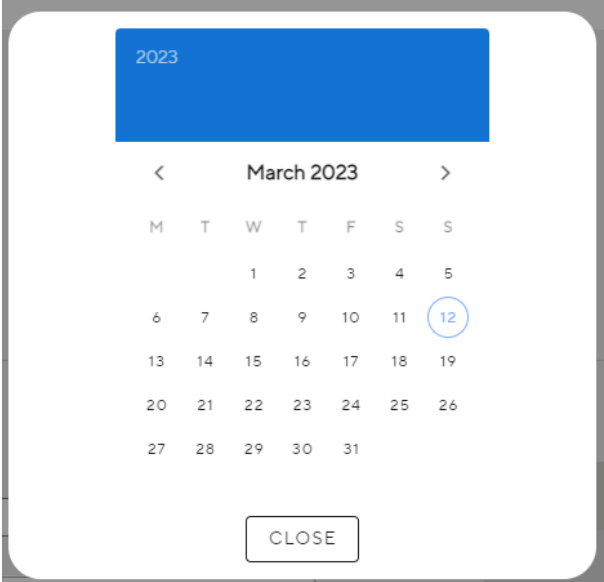
Q: What steps should I follow to enter the Estimated Delivery Date when creating a purchase order in Vendors Plus?

A: To enter the Estimated Delivery Date, follow these steps:

- Click the **calendar icon** in the **Estimated Delivery Date** section.



- Select the required date from the on-screen date picker.

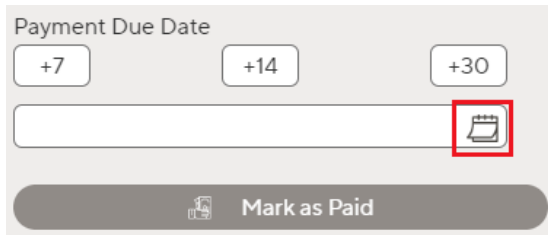


- Click **Close**.

Q: What steps should I follow to enter the Payment Due Date when creating a purchase order in Vendors Plus?


A: To enter the Payment Due Date, you have two options:

1. Click the **calendar control** in the **Payment Due Date** section to select a specific date.



Payment Due Date

+7 +14 +30



 Mark as Paid

2. Alternatively, you can use one of the numbered buttons in this section:

- For example, clicking on **+7** will set the payment due date to 7 days into the future from the current date.



Payment Due Date

+7 +14 +30



Receiving a Purchase Order

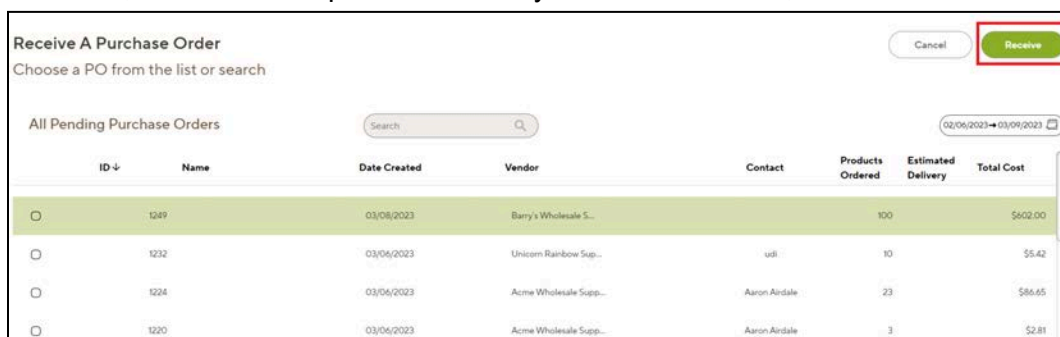
Q: What steps should I follow to receive a purchase order in Vendors Plus?

A: To receive a purchase order, follow these steps:

1. From the home screen, click **Receive PO** to open the **Receive a Purchase Order** screen.

Note: The **Receive a Purchase Order** button is also available from the Vendor View screen and the My Purchase Orders screen.

2. If needed, search for the purchase order you want to receive, then click **Receive**.



Receive A Purchase Order

Choose a PO from the list or search

All Pending Purchase Orders

Search

02/06/2023 → 03/06/2023

ID	Name	Date Created	Vendor	Contact	Products Ordered	Estimated Delivery	Total Cost
<input type="radio"/>	1249	03/06/2023	Barry's Wholesale S...		100		\$602.00
<input type="radio"/>	1232	03/06/2023	Unicorn Rainbow Sup...	ull	10		\$5.42
<input type="radio"/>	1224	03/06/2023	Acme Wholesale Supp...	Aaron Airdale	23		\$86.65
<input type="radio"/>	1220	03/06/2023	Acme Wholesale Supp...	Aaron Airdale	3		\$2.81

Cancel **Receive**

3. Enter the actual quantity received for each item in the **Qty Received** field.

UPC	Product	Size	Department	Qty Ordered	Cost	Total	Qty Received
002387000055	Sutter Home Moscato		ZUP	100	\$602	\$602.00	100

Added Notes:

Payment Amount: \$

Payment Method:

TOTAL
Number of Products: 100
Total Price: \$602.00

Back Finish

4. Click **Finish** to complete the process.

Q: What steps should I follow to add a payment to a purchase order in Vendors Plus?

A: To add a payment to a purchase order, follow these steps:

1. Select a payment method. This action will automatically prefill the amount due for the purchase order.
2. If you wish to pay a lesser amount, you can enter the desired payment amount. The remaining balance will be carried over and added to your payments due.
3. Please note that entering a payment amount greater than the total due for the purchase order is not allowed.

Q: Is it possible to add notes to a purchase order in Vendors Plus?

A: Yes, you can add free text notes to a purchase order. To do this:

1. Locate the **Notes** section in the bottom left corner of the purchase order screen.
2. Enter your desired notes or comments in the text field provided.

Q: When receiving a purchase order can I add new products to a purchase order in Vendors Plus?

A: Yes, you can add new products to your purchase order by following these steps:


1. **Fill in the Product Information:** Enter the necessary details such as the product name, UPC, and any other required information.

Receive A Purchase Order

Purchase Order no. **1250**
 From **Barry's Wholesale Supplies**
 Contact **N/A**

Estimated Delivery Time: **N/A**
 Date & Time Received: **03/08/2023 11:17 AM**
 Delivery Delay: **N/A**
 Priority: **Low**

UPC	Product	Size	Department	Qty Ordered	Cost	Total	Qty Received
002387000055	Sutter Home Moscato		7UP	100	5.602	5.602.00	100
051500204306	Pillsbury Best		09 General	100	1.99	100.00	<input type="text"/>

2. **Click on the "Add" Button:**  Once you click "Add," the new product will be included in your purchase order.
3. **Enter Quantity Received:** After the product is added, you will need to specify the quantity received in the **Qty Received** field.
4. **Automatic Addition to Pricebook:** If the product you are adding is not already in your pricebook, it will be automatically added there as well.

Q: What happens to my inventory when I receive a product in Vendors Plus?

A: When you receive a product in Vendors Plus, the quantity received is automatically added to your inventory.

- If the product was previously tracked in your inventory, the received quantity will update the existing stock levels.
- If the product was not previously tracked in inventory, it will now be tracked moving forward.

Inventory Dev Israel 03 - real hardware 120: Dev Israel 03 - real hardware [Back to Home](#)

Inventory Management (Item Detail)

View All

Enter product name/UPC or scan UPC.
 Q sutter Show items not in pricebook

Stock Level OK (1 ITEMS)

UPC	Description	Available	Days Left	Add Stock
0-02387-00005-5	Sutter Home Moscato	100		<input type="button" value="Add"/>