# Vendors Plus (V+) Overview Manual

Vendors Plus is a premium feature. It is included in the Pro plan and above service/software plans. It can also be added as a stand alone feature if you have the Basic service plan.

Vendor Plus enables management of the complete purchase order lifecycle from the merchant portal as well as the POS. This includes creating a vendor, a purchase order, printing, and emailing purchase orders, tracking payments, and receiving goods. In this feature**,** receiving purchase orders is integrated with Inventory Management on the POS, so when a purchase order is received, the products in the purchase order are automatically added to your store's inventory. Additionally Vendors Plus purchase order management is integrated with Pricebook Management.

NOTE: ONLY administrator and manager users can access all aspects of Vendors Plus. Cashier users cannot access Vendors Plus. It is not possible to change these access levels at this time.

To access Vendors Plus, if you have the Pro Plan or above, you will need to log in to your Merchant Portal. Once you have logged in, you will be taken to the Merchant Portal main screen, where you can see the Vendors Plus tile:
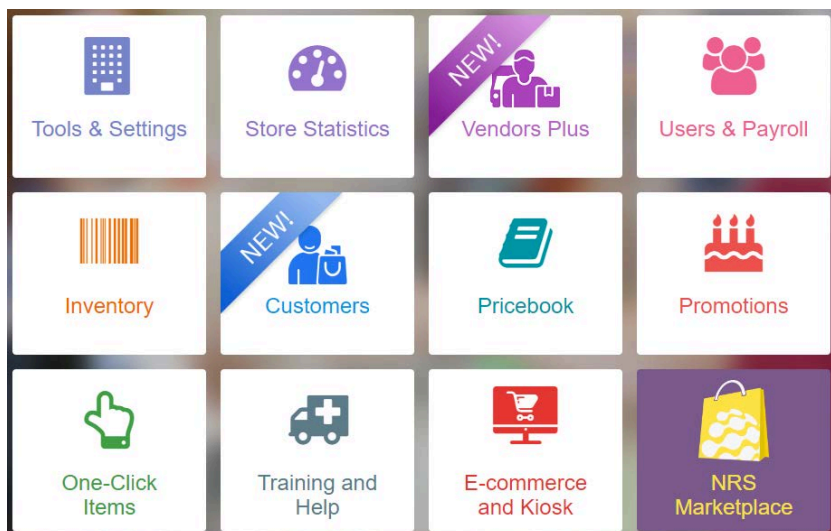
Merchants with a Basic plan will not be able to access Vendors Plus and will see the current Vendors tile. Clicking on the tile will take them to the old vendors management page, with a new button showing the Vendors Plus icon, enticing you to upgrade your license to access the additional features and benefits of Vendors Plus.
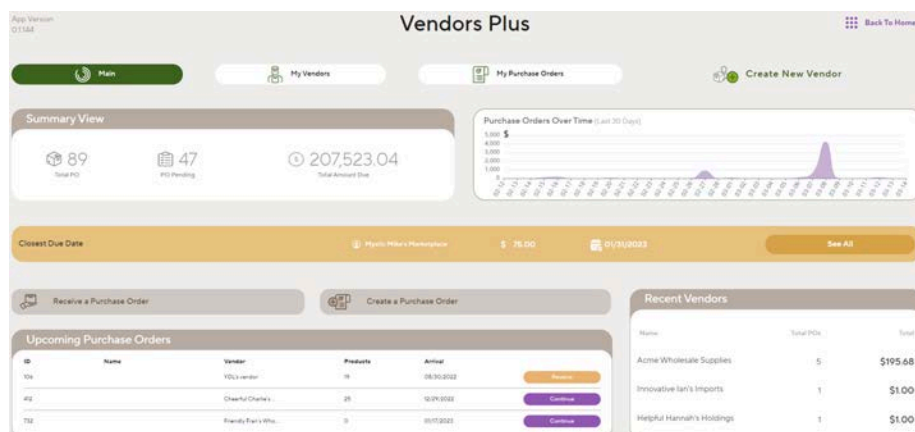

Clicking this tile shows the merchant a **New Vendors Plus** button that opens a window detailing the advantages of upgrading to Vendors Plus.

Vendors Plus Dashboard
The dashboard provides navigation and action buttons as well as summary view screens for purchase order activity.
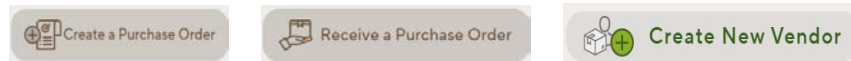
Navigation Buttons

- **Main**: Returns you to the Vendors Plus homepage.

- **My Vendors**: Takes you to the My Vendors screen for vendor management.

- **My Purchase Orders**: Takes you to the My Purchase Orders screen for purchase order management.

Action Buttons

- The **Create New Vendor** button allows you to enter details of a new vendor into Vendors Plus.
- The **Create a purchase order** button allows you to start a new purchase order .
- The **Receive a Purchase order** button allows you edit/modify and accept the purchase order into the inventory management system.

Vendors Plus provides an insight into all received POs that need to be marked as "paid"

You can see this information from the main dashboard by clicking

This will open up a window showing the Payments history window

Clicking **Create New Vendor** opens the **Create New Vendors** tab. The process to create a purchase order includes several steps:

- Creating a vendor if needed
- Selecting the vendor to create a PO
- Adding the items to a purchase order
- Confirming the details of each item purchased
- Scheduling the order and the payment to be made
- Receiving the order
- Making the scheduled payment.

Create a New Vendor

Enter the vendor's details, then click **Done**. This will bring you back to the Vendors Plus Dashboard. The next step is to select My Vendors

The My Vendors button will display a list of all the vendors that you have created to search and select as needed. It will also provide summary screens for payment status.

Selecting the vendor name opens up the vendor view where you can create or receive a PO.

When you Select "Order" that is on the same line as the vendor a new window will open asking you to "Create a new PO" or "Use an existing PO".
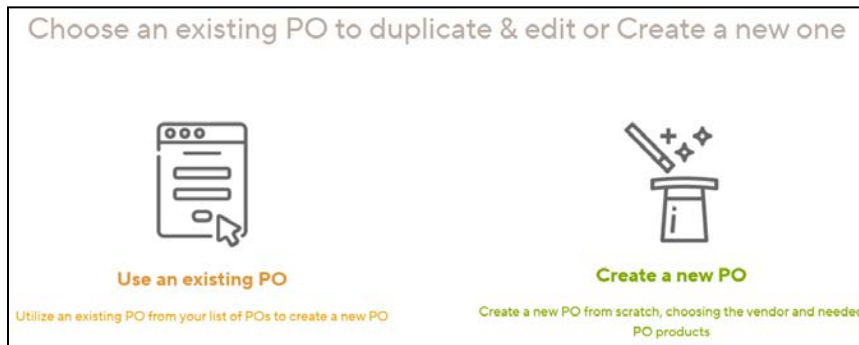

This will open the same window as above. Select "Create PO".

Create a New PO

This window provides a way to search for products in your pricebook that you wish to link with the new vendor. Linked Products are products linked to a vendor. When you create a new purchase order you will select the vendor you want to order from. You will see a list of all the products linked to that vendor.

You have the ability to search for any item by UPC, by any part of the name or description of items on the pricebook. If no products have been linked to the vendor yet, the system defaults to search by product.

If the product was previously linked to a different vendor, then the product is unlinked from the previous vendor and is linked to the current Purchase Order vendor.
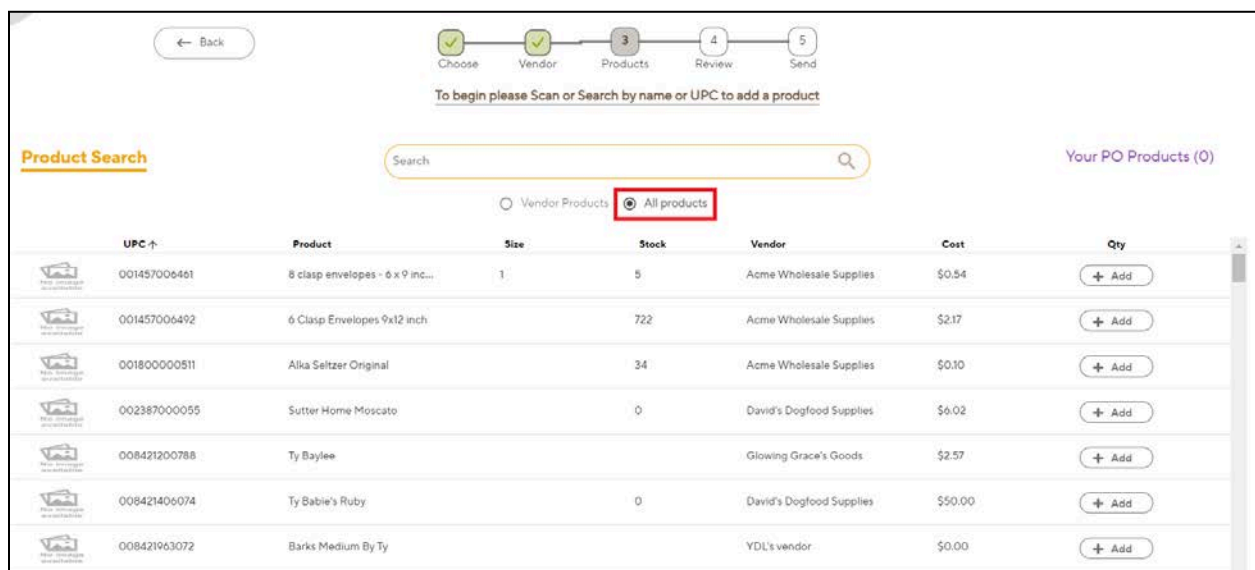
Once you have linked products to a vendor, the next time you create a PO using that vendor the system will default to the radio button showing the linked products.

To add a product to the purchase order, click **+ Add** .

Change the quantity by using the plus and minus signs, or type in the number you want.

Once you have selected the required quantity, you **MUST** click the check button to confirm your selection. If you do not click the check button, the system will not save your change.

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

Click . **Next →** on the top right corner of the order page.

If this is the first time you are ordering these products from this vendor, you will see the following pop-up.

This kinder Bueno will be linked to Coke

By choosing this product for this purchase order, you automatically link between this vendor and the product.

☐ Don't show this again

Cancel   Confirm ✓

NOTE: Products can only be linked to one vendor. Ordering a product that is previously linked to another vendor will display a pop up window asking you to confirm that this product will now be linked to the current vendor you are creating a PO for.

Changing Products' Vendor

This action will change these products' vendor from the original vendors to Acme Wholesale Supplies. Please Confirm

☑ Don't show this again

Cancel   Confirm ✓

If you do not wish to get this confirmation for every product you are adding to the vendor tick "**Don't show this again**", then click **Confirm**.

If you click **Cancel,** this will cancel adding the products to the purchase order and you will be returned to the product search page.

If you click "confirm" and you do not have costs in your PO for the items, a window will open asking you to update product cost.

Update Products Cost Information

We strongly recommend having cost info on your products to get sales and profitability reports and better understand your business.

PO products without cost

UPC	Name	Quantity	Cost
013000002127	Heinz Yellow Mustard	1	$0.00
013000008129	Heinz: Apple Cider Vinegar	1	$0.00
013000798006	Heinz Home Style:Savory Beef	1	$0.00
013000008525	Heinz Distilled White Vinegar	1	$0.00

Continue Without Cost   Confirm ✓

You can update the costs and then select confirm. If you update the costs please be advised that you will also update your costs on the POS. If you wish to not update the costs you can select "Continue without cost".

NOTE: We strongly recommend adding the cost info to your products to get sales and profitability and better understand your business. If you continue without cost you will be given the opportunity to add the cost in when the order is being received.

Either way you will be brought to the "Review and Confirm purchase order" page.

Please Review And Confirm The Following Purchase Order

Purchase Order no. **NA**
To **Beth Natural Juice Supply** (199 Main Street)
Contact **Beth Gonzales**

date 07/29/2024
time 6:15 PM
priority low

UPC	Product	Size	Stock	Qty Ordered	Quantity	Cost	Total
013000002127	Heinz Yellow Mustard	14 oz	0	10	1	$ 2.56	$ 25.60
013000008129	Heinz: Apple Cider Vinegar	16.00 OZ	0	6	1	$ 2.49	$ 14.94
013000008525	Heinz Distilled White Vinegar	16.00 OZ	0	20	1	$ 2.25	$ 45.00

If you want to adjust the quantity ordered, change the number in the **Qty Ordered** field. You can review the rest of the PO detail. You can Select payment terms and delivery dates as well as add a note to the order. The PO name can be used as a cross reference for your internal needs.

Purchase Order no. **NA**							date	07/29/2024
To **Beth Natural Juice Supply** (199 Main Street)							time	6:15 PM
Contact **Beth Gonzales**							priority	low
013000798006	Heinz Home Style:Savory Beef	12.00 OZ	0	30	1	$2.39		$71.70

Estimated delivery

PO Name

Purchase Order

Payment Due Date
+7   +14   +30

Added Notes:

Number of Products   66

Total to Pay $157.24

Check the purchase order details are correct, then click .

You will now see the **Saving Purchase Order** screen. Please note that the Vendor Plus system will assign a random PO number to your order.

If you are using the Merchant Portal on any device, then from this screen, you can email a PDF of the PO to yourself, print it, or download it.

If you are using the POS, you will **only** be able to email a PDF of the purchase order to yourself.
To email a PDF of the purchase order to yourself, click ,   [email icon]   then click **SEND** in the confirmation dialog box after confirming the email address.
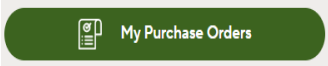
Information Message
    Email sent.

If you are using the Merchant Portal, you can print the purchase order by clicking, and then **Print**.

If you are using the Merchant Portal, you can download the purchase order by clicking .

Vendors Plus will show the status of all purchase orders by clicking on the button from the dashboard.

In addition to a list of all PO's you will will have a available a summary of activity for the week and last 30 days payments as well as buttons to create and receive PO's.
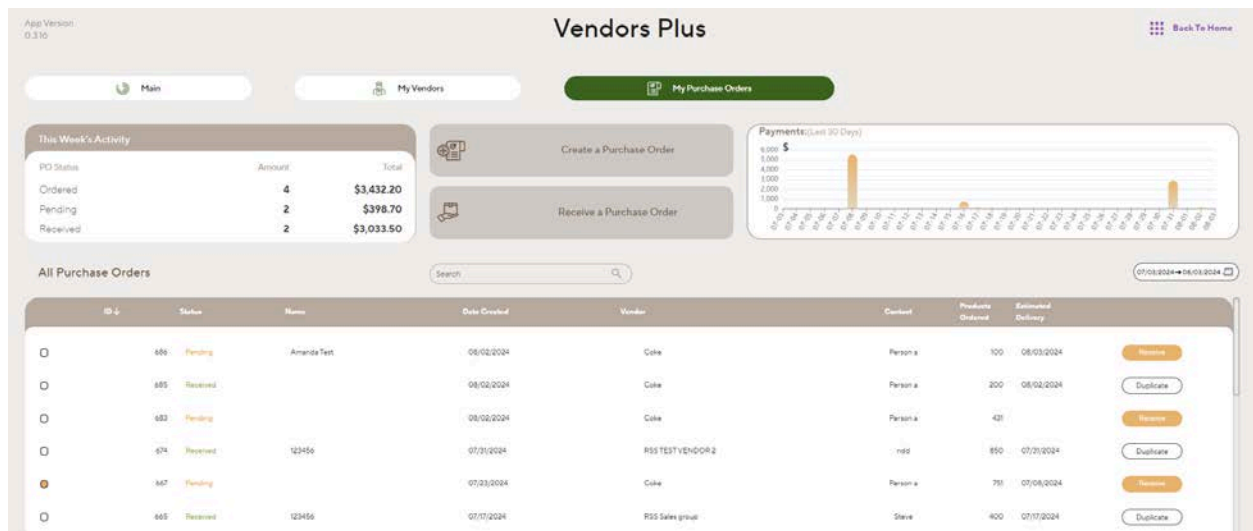
Vendors Plus will also show the merchant any order that is still open to receive or when an invoice is due to get paid.

To receive a purchase order:

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

From the home screen, click , this opens the "**Receive a Purchase Order**" screen. Receiving a PO is a manual process. When you get a delivery and validate that what was delivered matches what you ordered, this will reconcile the PO and update your inventory for all tracked items.

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

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

Click **Finish**,
Finish
.

NOTE: Vendors Plus allows you to edit the PO during the receiving process. Sometimes the vendor may send items in the PO that you did not order. You can add the extra unexpected items to a purchase order when you receive it. As well, you can adjust the quantity of each item delivered in the event that the quantity does not match what was ordered. The running total at the bottom right of the PO will reflect the changes being made in the quantity field.

In addition to being added to the purchase order, the unexpected product will also be added to your pricebook and inventory systems. If the product was not previously tracked in inventory, it will be tracked now.

Let's say that the original purchase order only included 100 x Poland Spring Natural Spring Water, however the vendor also sent 100 bottles of Snapple Lemon. In this case the purchase order can be adjusted as follows.

Click **Add** , to finish adding the Snapple Lemon to the purchase order. Once you have added the unexpected item to the purchase order, enter the quantity of the item that you received.

Once the PO has been revised with the correct items and quantities received - click receive PO.

You will now be able to then go to your POS and check the pricebook for inventory count or to the inventory tile and check the inventory there. Both will reflect the addition (or total in this case) of 100 Snapple Lemon.