



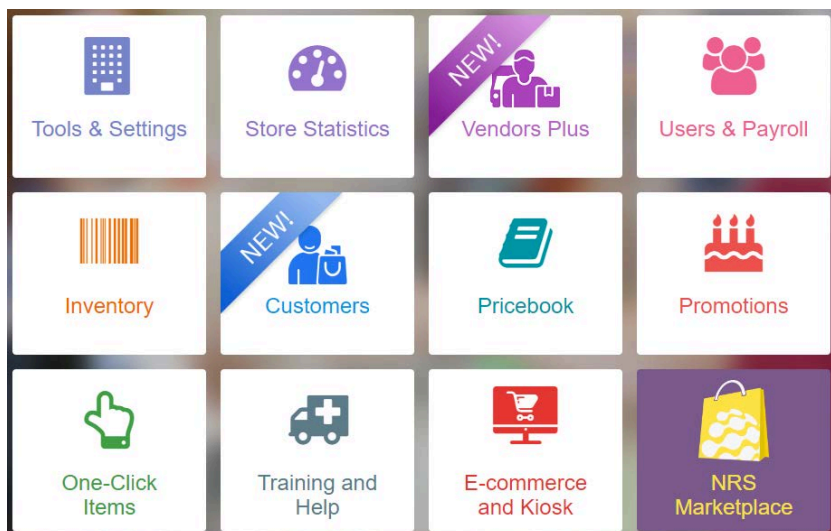
## Vendors Plus (V+) Overview Manual

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.

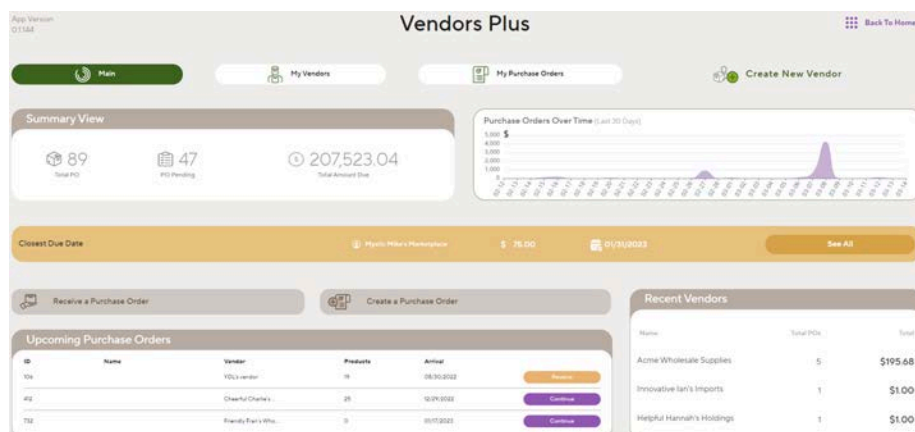


Clicking this tile shows the merchant a **New Vendors Plus** button that opens a window detailing the advantages of upgrading to Vendors Plus.



## Vendors Plus Dashboard

The dashboard provides navigation and action buttons as well as summary view screens for purchase order activity.

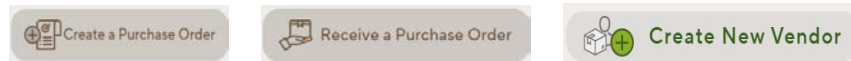


## Navigation Buttons



- **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

See All

This will open up a window showing the Payments history window

Payments Due		Payments History					
PO ID	PO Name	Vendor	Contact	Amount	Due Date ↓		
<input type="checkbox"/>	665 123456	RSS Sales group	Steve	\$179.00	07/17/2024	Mark as Paid	
<input type="checkbox"/>	623	Val Vendor		\$40.00	07/02/2024	Mark as Paid	
<input type="checkbox"/>	595	Milk vendor 06/24	Val	\$20.00	06/26/2024	Mark as Paid	
<input type="checkbox"/>	597	Milk vendor 06/24	Val	\$12.00	06/26/2024	Mark as Paid	
<input type="checkbox"/>	577	Val Vendor		\$96.00	06/25/2024	Mark as Paid	

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

### Create New Vendor

#### Vendor Details

Name\*

Address

Zip Code

City

State

#### Contact Details

Name

Phone #

Email

Role

Notes

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.

### Vendors Plus

Payments Status: Received \$12,107.47, Paid \$9,682.54, Amount Due \$1,101.22

Due Date Reminder: 4 different vendors

Vendor ID	Contact	Phone	Email	POs	Order
Amanda Gum delivery	Amanda	(555) 012	amanda.com	4	Order
Beth Natural Juice Supply	Beth Gonzales	(201) 555-1212	BethNatural@gmail.com	0	Order
Coke	Person A	(762) 555-012	test@oh.net	7	Order
Mike vendor Co.2K	W	(252) 323-43	w@w.com	6	Order
MISS Test shop	Charles	(762) 337-456		1	Order
MISS Sales group	Steve	(845) 222-2001	www.applebaum@oh.net	1	Order
MISS TEST VENDOR 2	MB		mb@	1	Order
Steve's Supply	Steve A	(845) 222-2001	www.applebaum@gmail.com	3	Order
Tony Supply	Tony	(201) 555-1212		1	Order
W/Vendor				11	Order

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

### Vendor View

#### Beth Natural Juice Supply

Receive PO Create PO

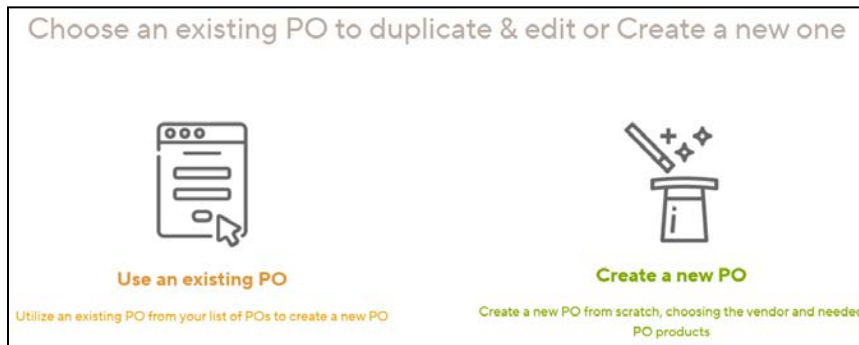
Total Purchase Orders (last m) 0 Total Purchases (last m) \$0.00

Address 199 Main Street, Anywhere, AK, 98765

Contact Beth Gonzales Email BethsNatural@gmail... Role Main

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

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”.



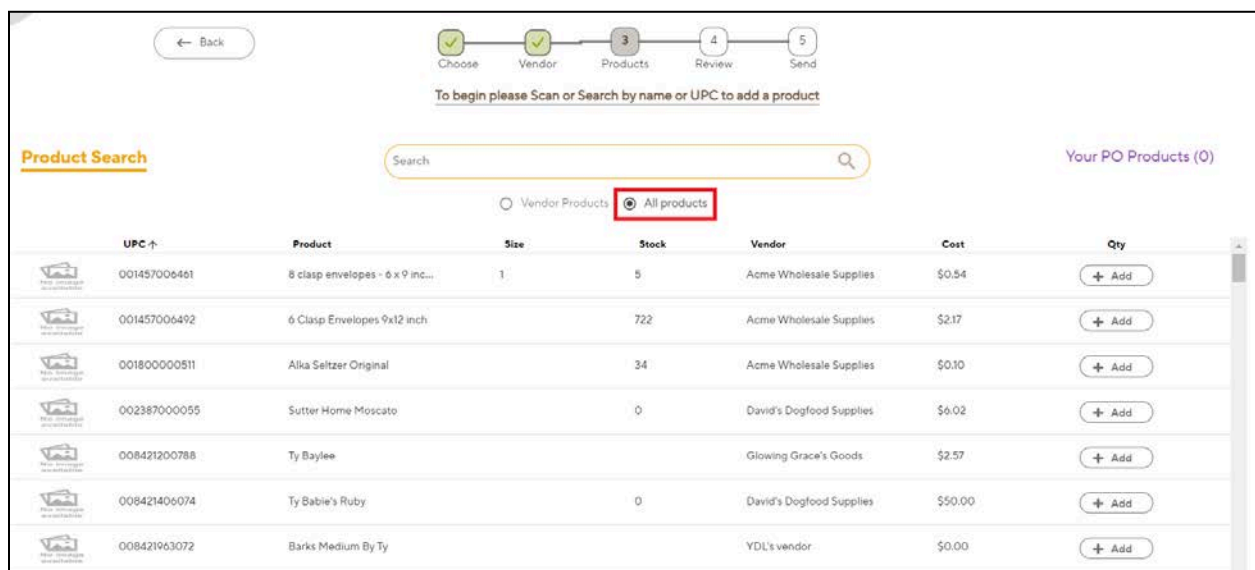
This will open the same window as above. Select “Create PO”.

## 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 begin please Scan or Search by name or UPC to add a product

Product Search

Search

Your PO Products (0)

UPC ↑	Product	Size	Stock	Vendor	Cost	Qty
0707032052	Steak 4oz		12	Coke	\$5.44	+ Add
04000000443	COKE 20OZ	BOTTLE	811	Coke	\$1.50	+ Add
04000000460	COKE DIET 20 OZ	BOTTLE	250	Coke	\$1.32	+ Add
04000000904	COKE CHERRY CAN	12.00 OZ	2	Coke	\$0.02	+ Add
04000000246	COKE CAFFINE FREE CAN	12.00 OZ	1	Coke	\$0.50	+ Add
04000000342	COKE VANILLA CAN	12.00 OZ	1	Coke	\$0.50	+ Add
040000004032	COKE MEX 16OZ	355 ml	1	Coke	\$1.25	+ Add
04000000346	COKE CAN	12 oz	1	Coke	\$0.62	+ Add
040000003979	DT COKE 15PK CANS	15 PACK CANS	1	Coke	\$5.49	+ Add

+ Add

UPC ↑    Product    Cost    Qty

No image available    001457006461    8 clasp envelopes - 6 x 9 inc...    \$0.54    - 1 +    ✓

To add a product to the purchase order, click

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	<input type="text" value="1"/>	<input type="text" value="\$0.00"/>
013000008129	Heinz: Apple Cider Vinegar	<input type="text" value="1"/>	<input type="text" value="\$0.00"/>
013000798006	Heinz Home Style:Savory Beef	<input type="text" value="1"/>	<input type="text" value="\$0.00"/>
013000008525	Heinz Distilled White Vinegar	<input type="text" value="1"/>	<input type="text" value="\$0.00"/>

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.

← Back

✓ Choose
✓ Vendor
✓ Products
4
5

Create ✓

Please Review And Confirm The Following Purchase Order

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**

UPC	Product	Size	Stock	Qty Ordered	Quantity	Cost	Total
013000002127	Heinz Yellow Mustard	14 oz	0	<input type="text" value="10"/>	1	<input type="text" value="\$2.56"/>	\$25.60
013000008129	Heinz: Apple Cider Vinegar	16.00 OZ	0	<input type="text" value="6"/>	1	<input type="text" value="\$2.49"/>	\$14.94
013000008525	Heinz Distilled White Vinegar	16.00 OZ	0	<input type="text" value="20"/>	1	<input type="text" value="\$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  
time 6:15 PM

To **Beth Natural Juice Supply** (199 Main Street) priority low

Contact **Beth Gonzales**

013000798006 Heinz Home Style Savory Beef 12.00 OZ 0 30 1 \$2.39 \$71.70

Estimated delivery

Payment Due Date  +7  +14  +30

PO Name

Added Notes:

Purchase Order

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.

Choose Vendor Products Review 5 Done ✓

**Saving Purchase Order**  
No. 1220 to Acme Wholesale Supplies (3 Acme Street)

**CG Store 2302818** To **Acme Wholesale Supplies**

(234) 234-2341 3 Acme Street  
94 ELM ST Acme City, NY 1020304  
NEWARK, NJ 34563Z Aaron Airdale, (013) 435-4343

Purchase Order no. 1220 priority low date 03/06/2023 time 9:15 AM

UPC	Product	Size	Qty Ordered	Cost	Total
00180000080	Aika Sertze Original		1	\$0.10	\$0.10
00149000485	8 deep envelopes 9 x 10 inch 1		1	\$0.94	\$0.94
00140006499	8 Clear Envelopes 9x12 inch		1	\$9.17	\$9.17

Estimated Delivery  Notes:

Payment's Due Date

**SIGNATURE**

**Email**  
send this purchase order to the vendor and yourself Via our system

**Print**  
to this device, but no worries, all POs are saved in your POS


**Download**  
to this device, but no worries, all POs are saved in your

**Information Message**  
Email sent.

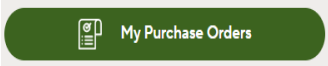
If you are using the Merchant Portal on any device, then from this screen, you can email a PDF of the PO to yourself, print it, or download it.

If you are using the POS, you will **only** be able to email a PDF of the purchase order to yourself.

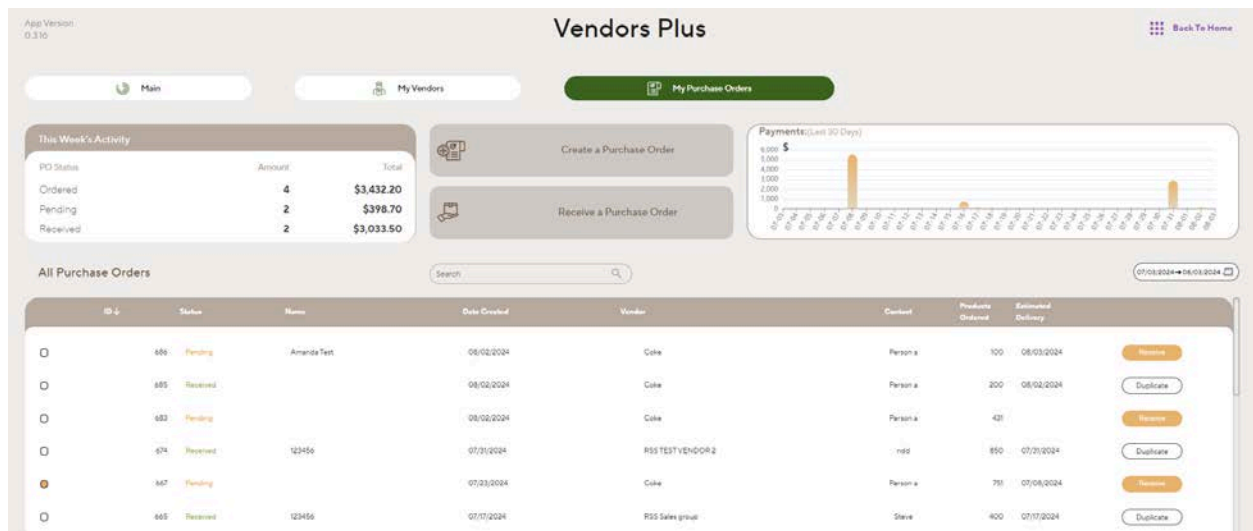
To email a PDF of the purchase order to yourself, click ,  then click **SEND** in the confirmation dialog box after confirming the email address.

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**.

The screenshot shows the 'Receive A Purchase Order' interface. At the top right, there are 'Cancel' and 'Receive' buttons. Below the title, it says 'Choose a PO from the list or search'. The main area is titled 'All Pending Purchase Orders' and includes a search bar and a date range selector (02/06/2023 to 03/09/2023). A table lists the following purchase orders:

ID	Name	Date Created	Vendor	Contact	Products Ordered	Estimated Delivery	Total Cost
1249		03/08/2023	Barry's Wholesale S...		100		\$602.00
1232		03/06/2023	Unicorn Rainbow Sup...	udi	10		\$5.42
1224		03/06/2023	Acme Wholesale Supp...	Aaron Airdale	23		\$86.65
1220		03/06/2023	Acme Wholesale Supp...	Aaron Airdale	3		\$2.81

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

The screenshot shows the details for purchase order 1249. It includes fields for 'Purchase Order no. 1249', 'From Barry's Wholesale Supplies', and 'Contact N/A'. A table lists the items with their 'Qty Received' field highlighted:

UPC	Product	Size	Department	Qty Ordered	Cost	Total	Qty Received
002387000055	Sutter Home Moscato		7UP	100	\$ 6.02	\$ 602.00	100
				1	0.00	0.00	

At the bottom right, a 'TOTAL' summary shows 'Number of Products: 100' and 'Total Price: \$602.00'. A 'Finish' button is visible at the bottom right.

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.

UPC	Product	Department	Qty Ordered	Quantity	Cost	Total	Qty Received
070200000403	Petal Spring Natural Spring Water	Drinks	100	1	\$ 0.04	\$ 0.00	0
076183003512	Snapple Lemon	Drinks	100	1	0.72	72.00	<input checked="" type="checkbox"/> Add

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.

UPC	Description	Available	Days Left	Add Stock
0-02387-00005-5	Sutter Home Moscato	100		