



NATIONAL  
RETAIL  
SOLUTIONS

## Public Release Notes for Panther POS

(Version 0.9.42)

- **Vendors Plus Integration**
- **End of Day Report Enhancement**

### **Vendors+ Management System: Simplify, Organize and Optimize Your Vendor Relationships**

The Vendors+ Premium Feature is an all-in-one platform for easily managing vendors, creating and receiving invoices, tracking orders, and saving money.



# Vendors+

## Vendors+ Integration

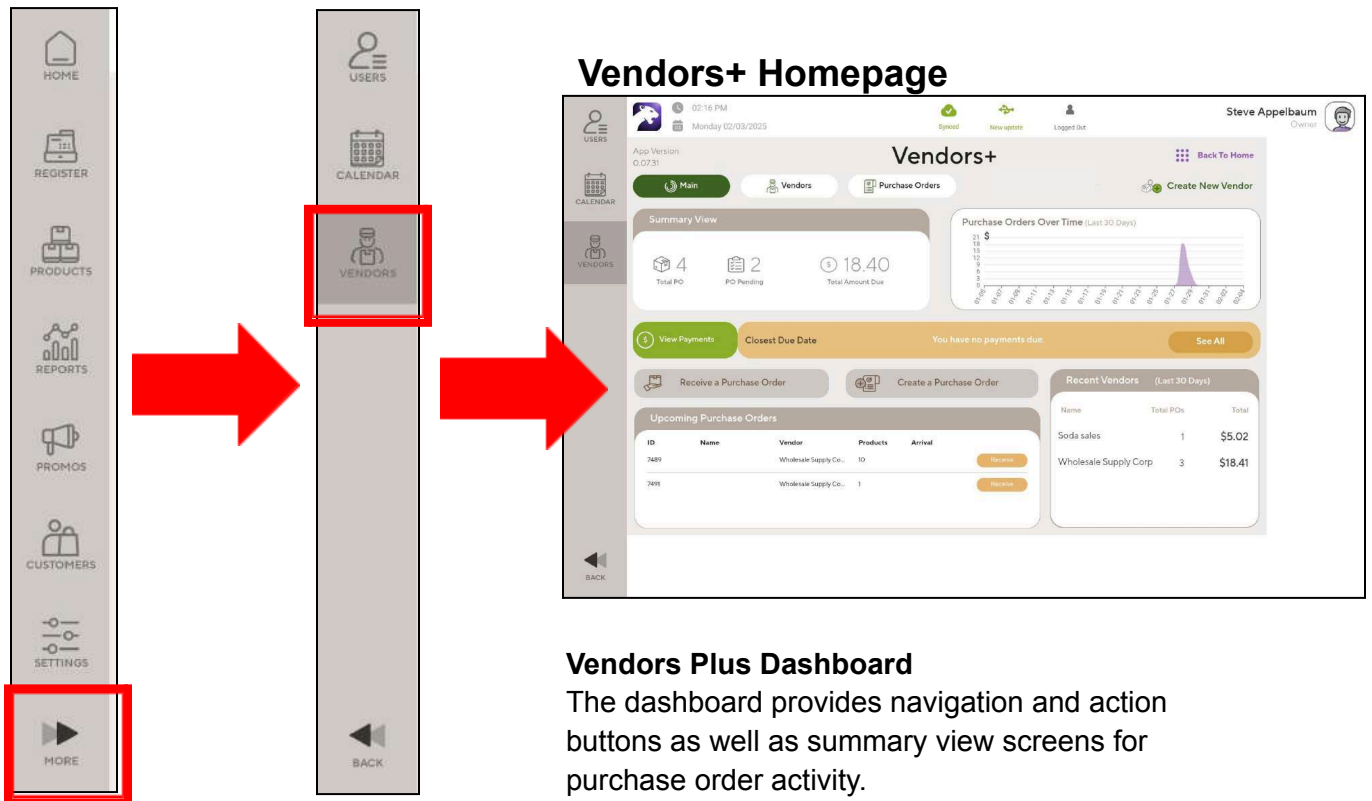
Tapping on **Vendors** now opens the Vendors+ order management system from within Panther POS.

Vendors+ will open in Panther POS as a web-view which is exactly the same as the Vendors+ web-view seen in the classic POS.

From the Home screen select the Vendors button.



Or you can use the left side navigation bar and select more and then tap on the Vendors button.

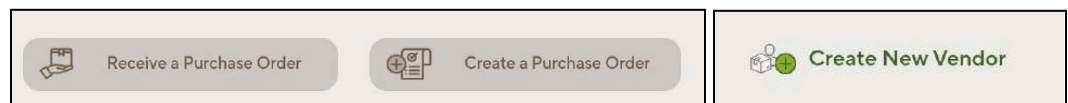


## Navigation Buttons



- **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.

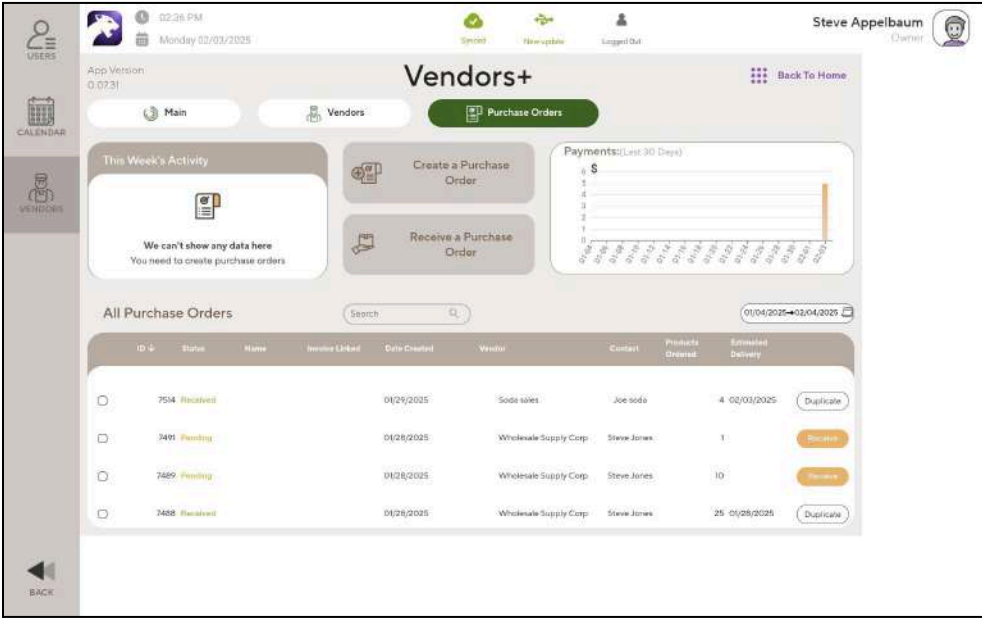
## Vendors Overview Screen

The screenshot shows the Vendors+ app interface. At the top, there's a header with the app name 'Vendors+', the user name 'Steve Appelbaum', and a 'Logout' button. Below the header, there are navigation buttons for 'Main', 'Vendors', and 'Purchase Orders'. A 'Create New Vendor' button is also visible. The main content area is divided into several sections:

- Payments Status (Last 6 months):** A summary card showing 'Ordered: \$84.96', 'Paid: \$5.02', and 'Amount Due: \$18.40'.
- Payments (Last 30 Days):** A bar chart showing payment activity over the last 30 days.
- Due Date Reminder:** A card indicating 'You have no payment due date' and a 'See All' button.
- All Vendors:** A table listing vendors with columns for Vendor, Phone, Email, POs, and an 'Order' button for each.

Vendor	Phone	Email	POs	Action
Soda sales	(203) 555-1212	Joe@sodasales.com	1	Order
Wholesale Supply Corp	(201) 555-1212	steve.jones@wholesalesupply.com	3	Order

# Purchase Orders Overview Screen

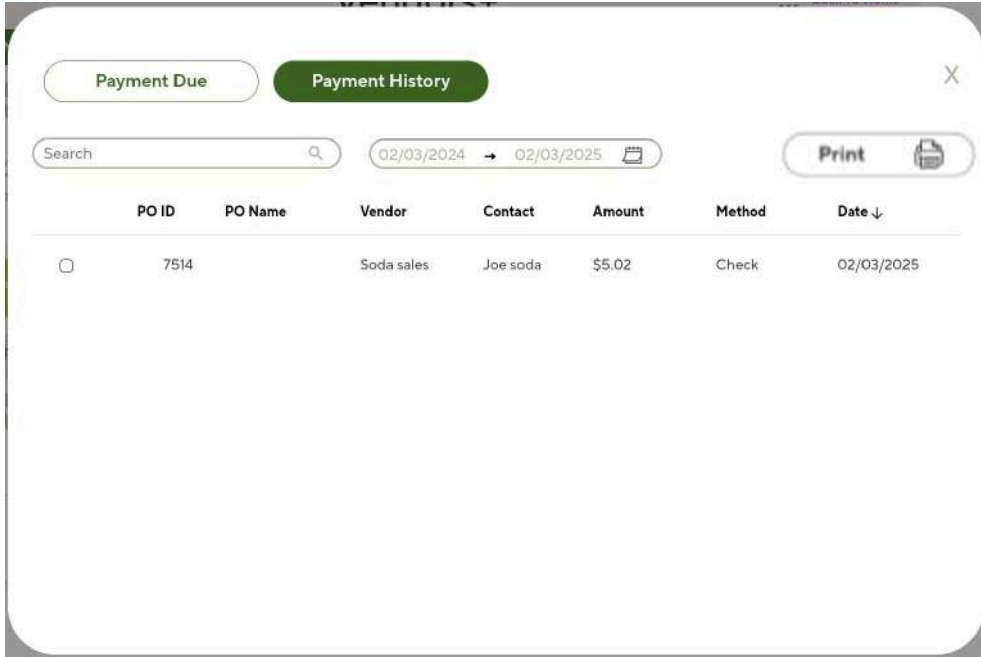


Vendors Plus provides an insight into all POs

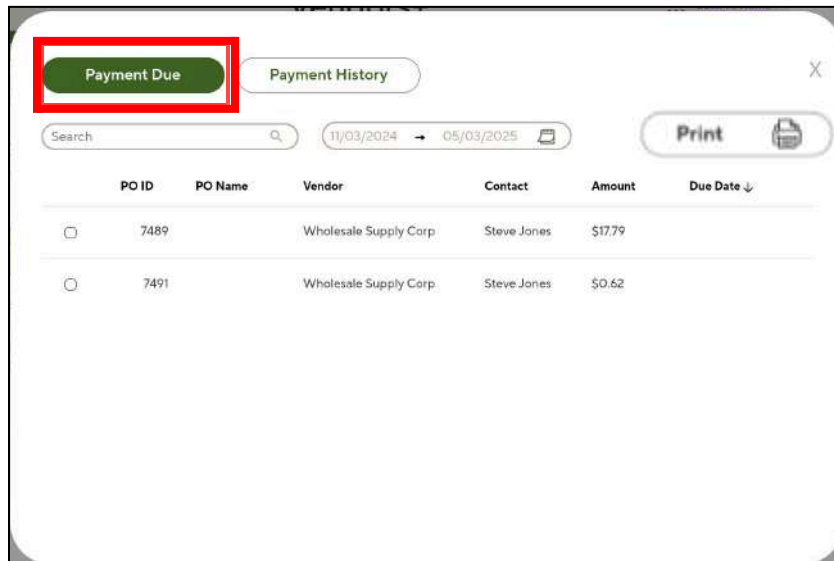
You can see this information from the main dashboard by clicking



This will open up a window showing the Payments window



The default opens the window to **Payment History**. If you want to see any POs that still need to be paid in Vendors Plus select the **Payments Due** button.



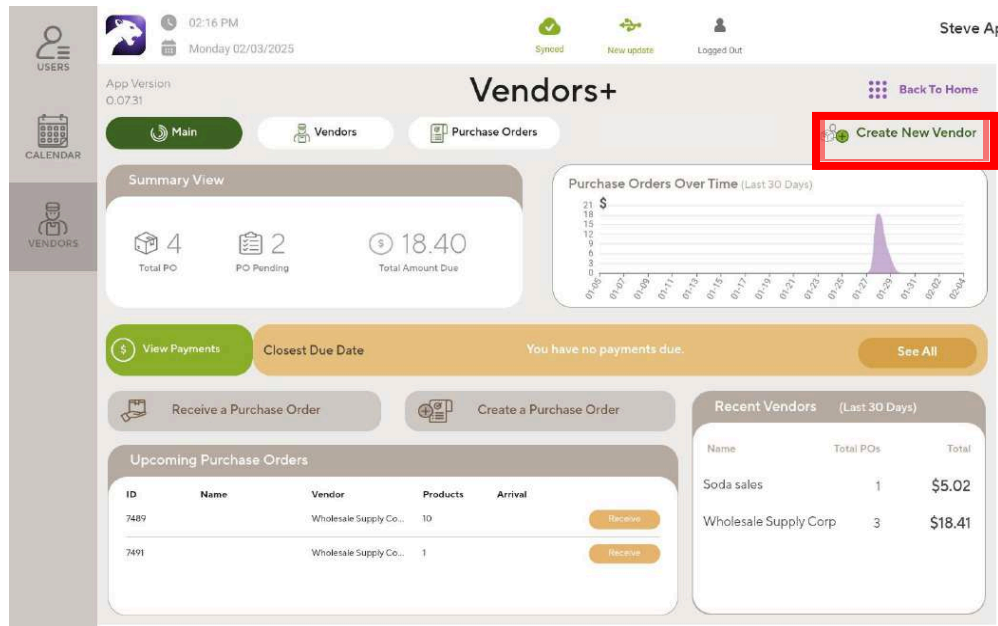
# How to create a Purchase Order

The process to create a PO 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

The first step in creating a purchase order is to create a new vendor. From the Home screen select the **Create New Vendor** Button.



Enter the vendor's details, then click **Done**. This will bring you back to the Vendors Plus Dashboard.

**Create New Vendor**

**Vendor Details**

Name \* Wholesale Supply Corp

Address 123 Main Street

Zip Code 12345

City Schenectady

State Alabama

Phone # (201) 555-1212

**Contact Details**

Name Steve Jones

Phone # (201) 555-1212

Email steve.jones@wholesalesupply.com

Role Main

Notes Promotions will be added to all orders

Cancel Done

The next step is to select the My Vendors button



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+**

App Version: 0.07.31

Back To Home

Main My Vendors My Purchase Orders Create New Vendor

**Payments** Status (Past 12 months)

We can't show any data here  
You need to make some payments

**Payments: (Last 30 Days)**

We can't show any data here  
You need to make some payments

**Due Date Reminder** See All

You have no payment due date  
create an order to show info here

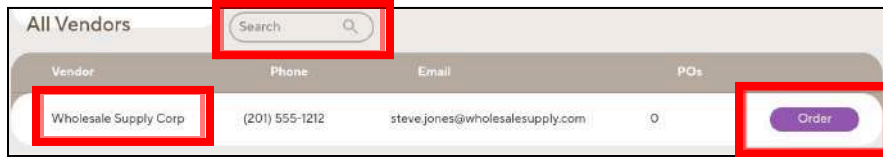
All Vendors Search

Vendor	Phone	Email	POs
Wholesale Supply Corp	(201) 555-1212	steve.jones@wholesalesupply.com	0

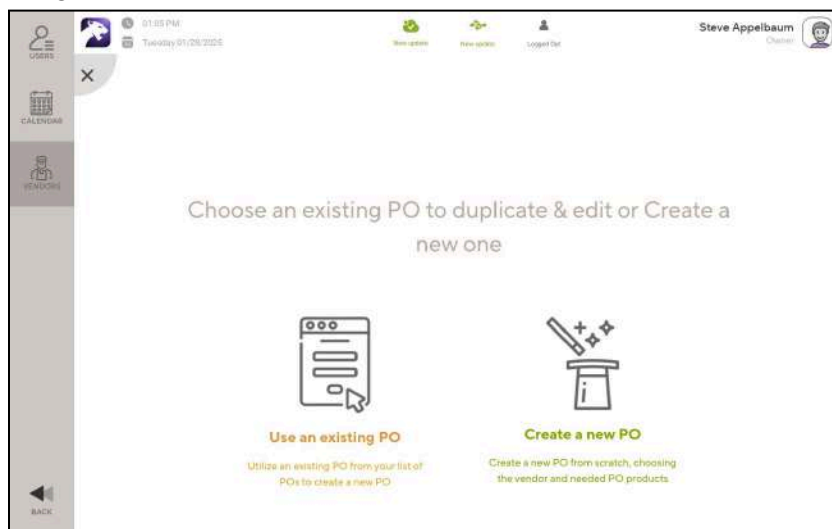
Order

To create a PO, you can take the following actions.

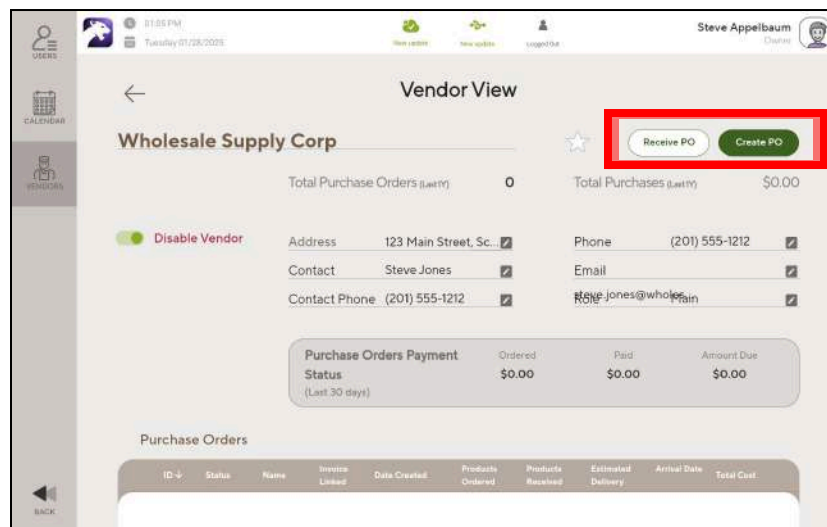
- Tap the purple **Order** button or
- Select the Vendor name or
- Use the search bar to find the vendor you are looking for and then select the name.



Selecting the purple **Order** button a new window will open asking you to “Create a new PO” or “Use an existing PO”.



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

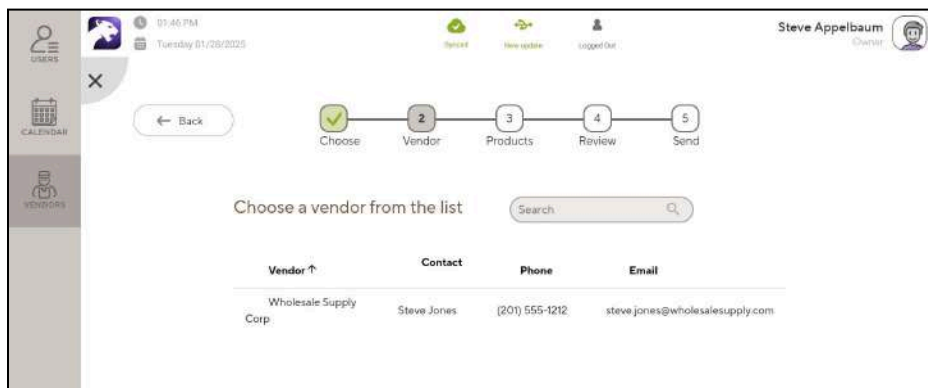


Selecting **Create PO** will open the same window as above. In either case select **Create PO** as this is the first time you are using this vendor for ordering.

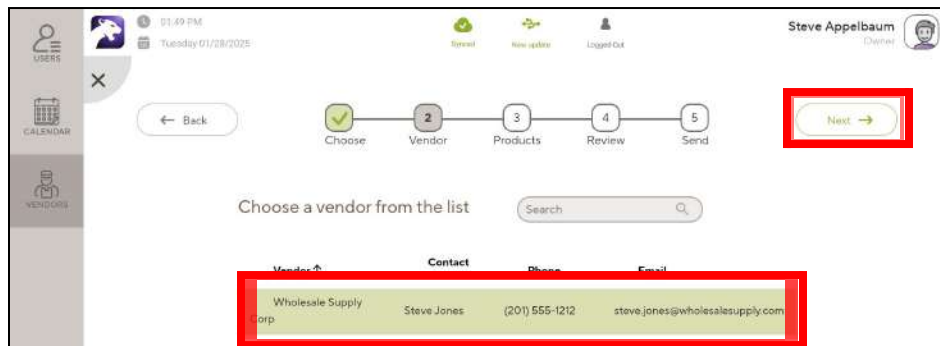
## Create a New PO

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.

First, select the vendor that you want to create a PO for.

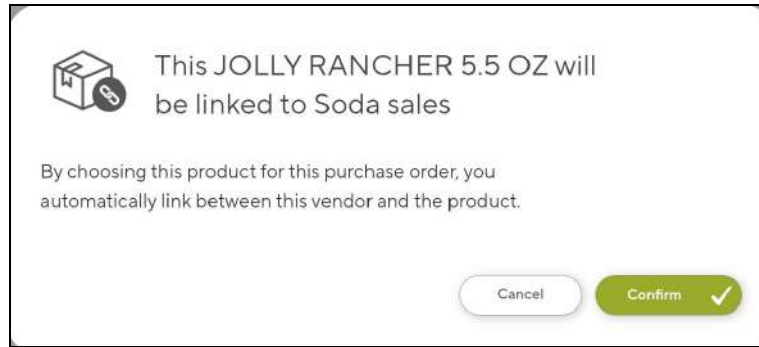


Then tap the **Next** button on the top right hand side that will only appear AFTER a vendor has been selected.



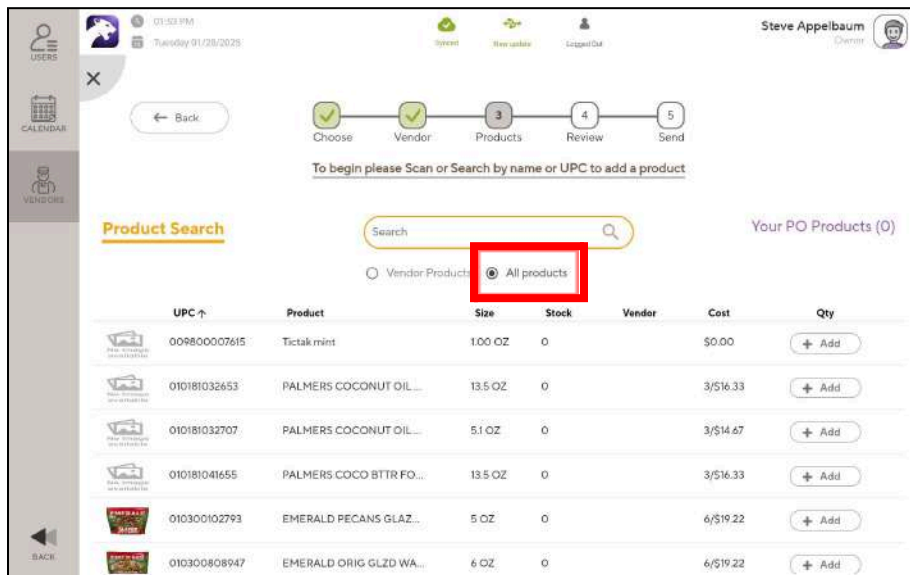
You have the ability to search for any item by UPC, by any part of the name or description of items on the pricebook. If no products have been linked to the vendor yet, the system defaults to search by product.

When you add the items to the PO they (the items) will be linked to that vendor. By clicking on next a pop-up window will appear asking you to confirm your selection.

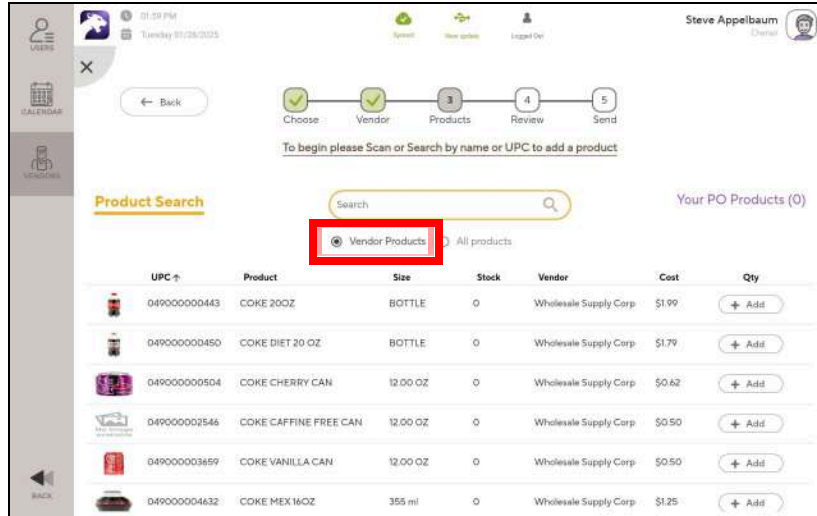


Clicking **Confirm** will take you to the review section of creating a PO.

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. You will see the following pop up.



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 . 

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

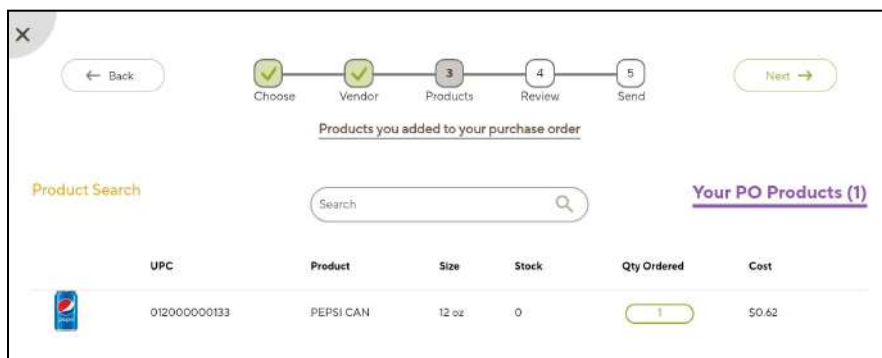


Continue adding products to your purchase order until you have added everything you want to order.

To review the items that you have automatically added to this vendor/PO tap the **Your PO Products** that is located to the right of the search bar.



The products that you have added to your purchase order will be listed in the PO Products window.



If you wish to add additional items to the PO before it is finalized, click the back button on the top left hand side of the PO Products screen. This will take you back to the products search screen so that you can add additional items.

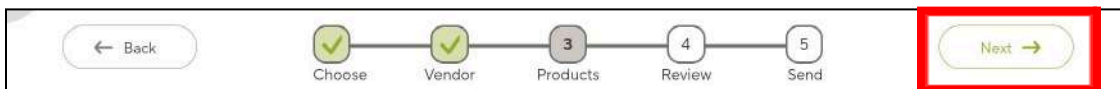
If you need to remove items from the PO tap the quantity for that item. To remove the item click the red **X**.



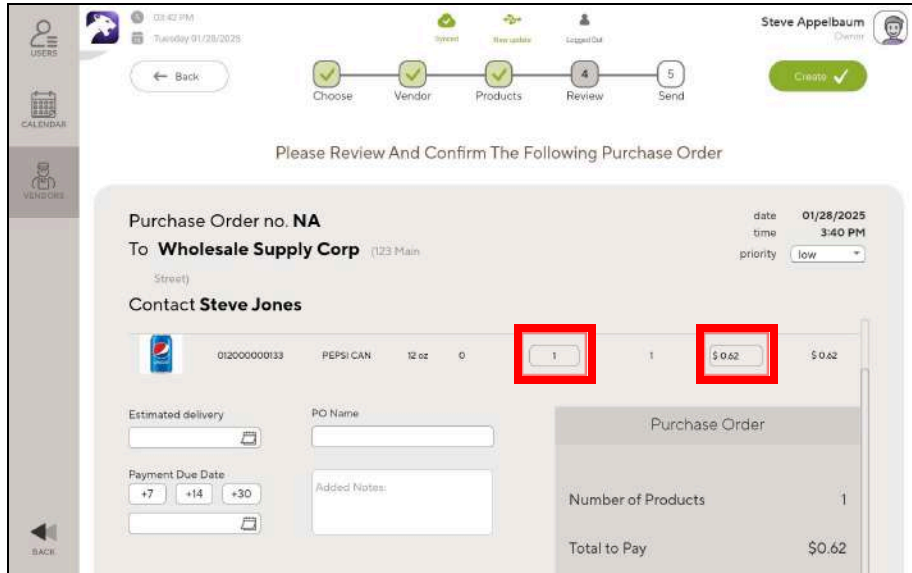
To the adjust the quantity simply press the + or - button or type in the box the number you want to order.



If you are done adding items to your PO click **Next** on the top right corner of the order page.



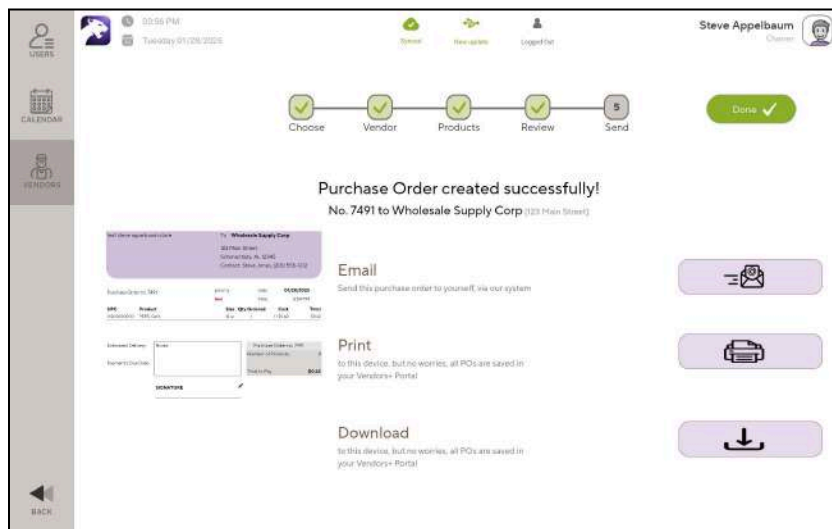
This will bring you to the review orders screen. If you want to adjust the quantity ordered, change the number in the **Qty Ordered** field. You can review the rest of the PO detail. You can Select payment terms and delivery dates as well as add a note to the order. The PO name can be used as a cross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



After reviewing the Purchase Order, click create on the top right hand side of the screen.



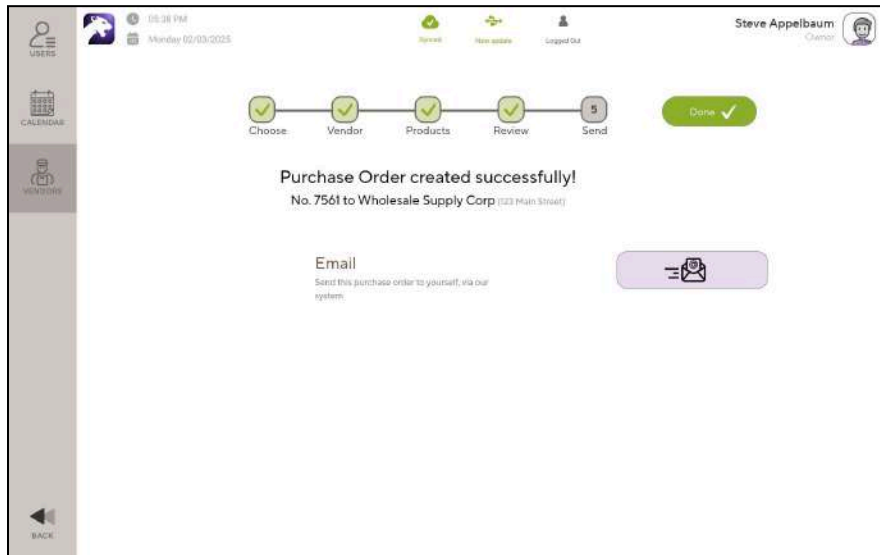
You will now see the **Saving Purchase Order** screen. Please note that the Vendor Plus system will assign a PO number to your order.



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 ,



You will immediately see a pop up on screen that shows you that the PO has been emailed.

**NOTE: Emails from the screen are only sent to the admin email address on the Panther in users.**



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



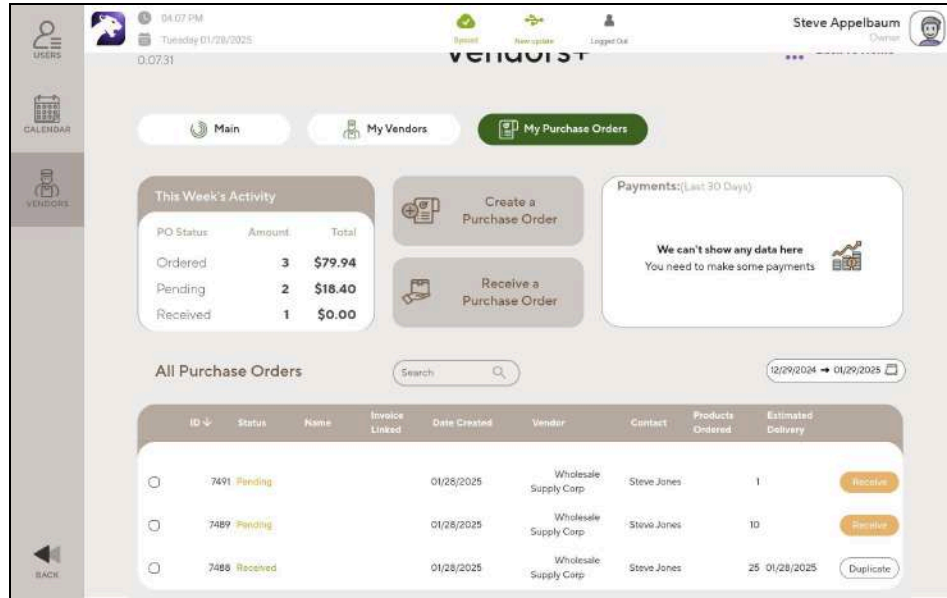
If you are using the Merchant Portal, you can download the purchase order by clicking .



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 have 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 you any order that is still open to receive or when an invoice is due to get paid.

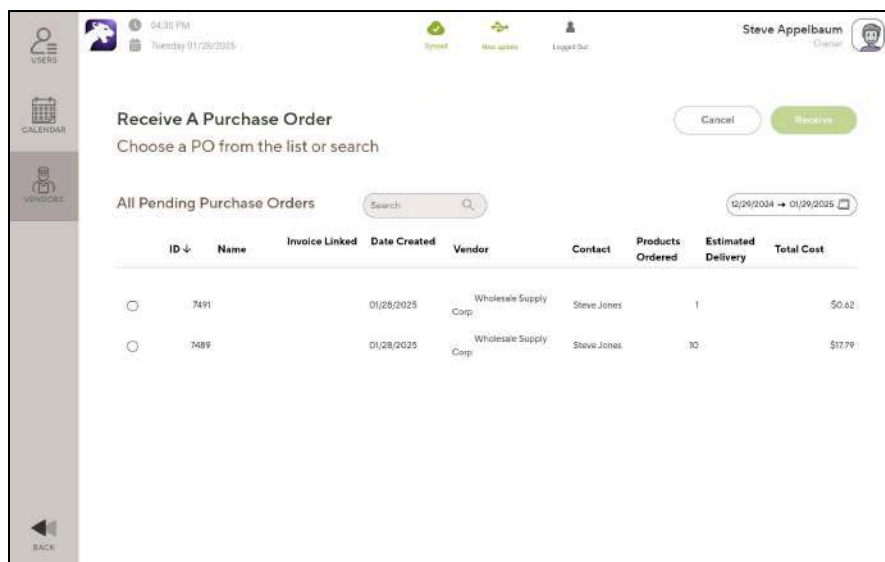
## Receive a purchase order:

**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 ,

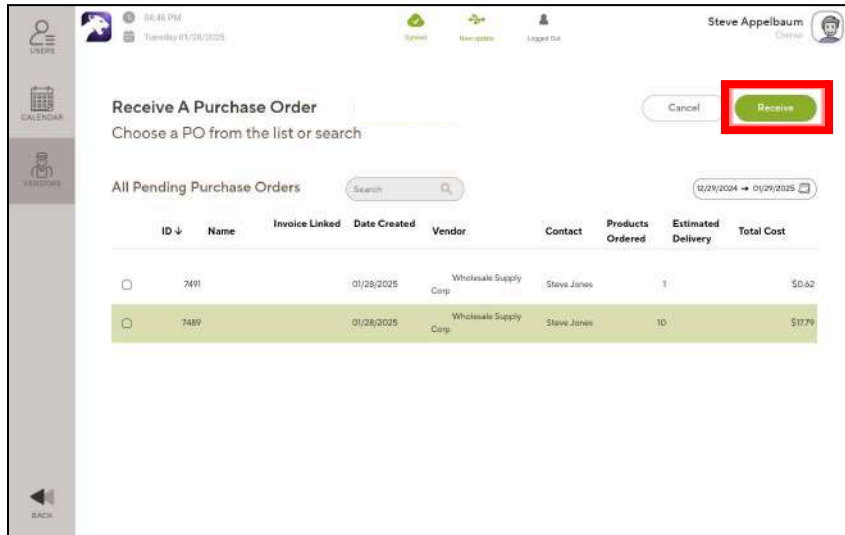


This opens the “**Receive a Purchase Order**” screen.

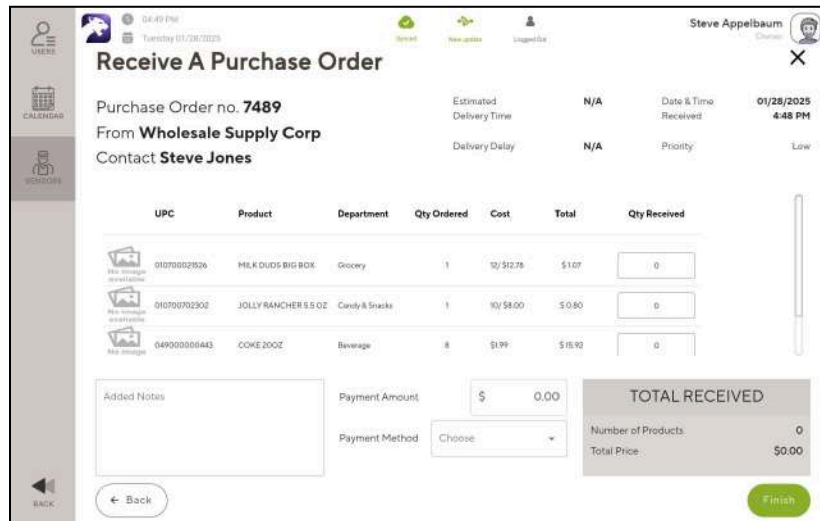


Receiving a PO is a manual process. When you get a delivery and validate that what was delivered matches what you ordered, this will reconcile the PO and update your inventory for all tracked items.

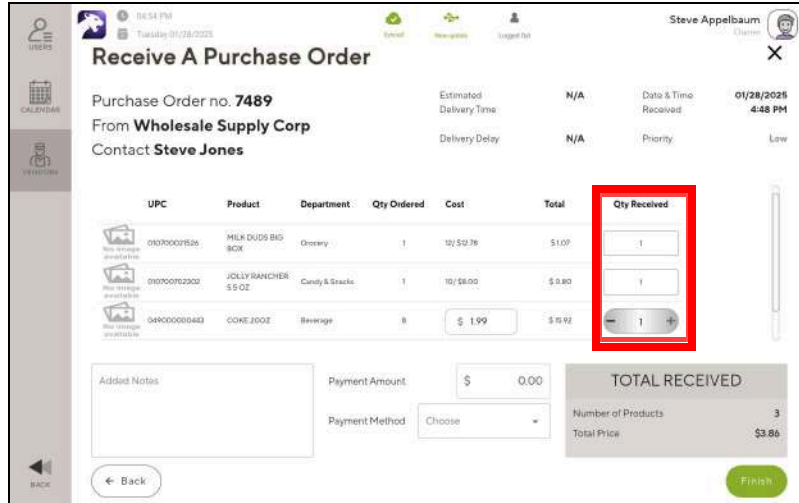
If required, search for the purchase order you want to receive, then click **Receive**.



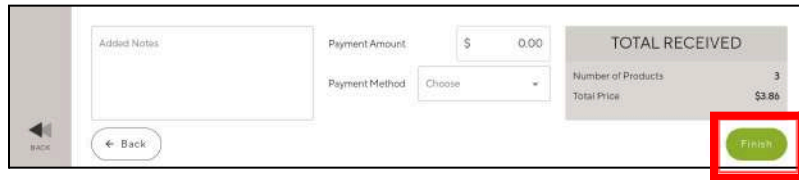
This will open the Receive a Purchase Order window.



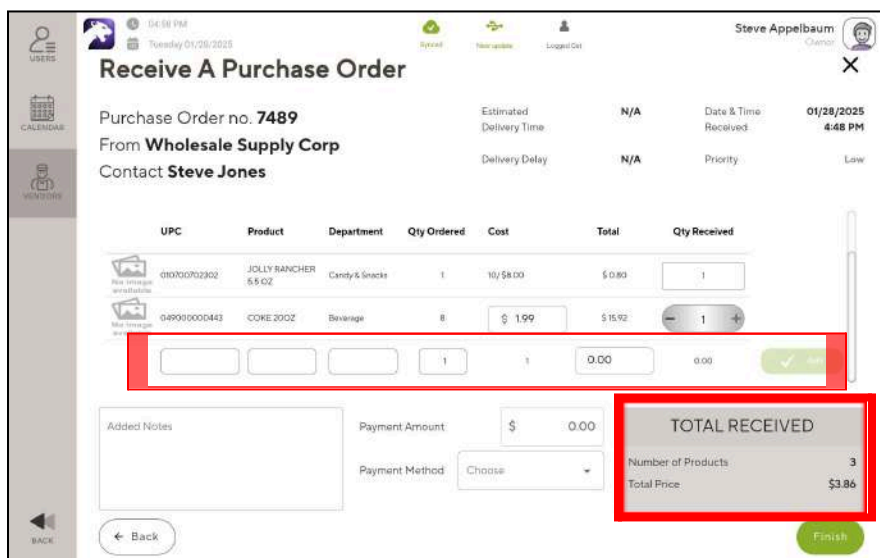
Enter the actual quantity received of each item in the **Qty Received** field.



When you are done click Finish on the bottom right hand side of the screen.

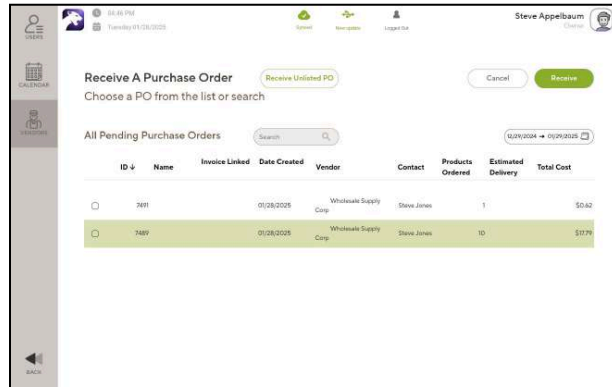


**NOTE:** Vendors Plus allows you to edit the PO during the receiving process. Sometimes the vendor may send items in the PO that you did not order. You can add the extra unexpected items to a purchase order when you receive it. As well, you can adjust the quantity of each item delivered in the event 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.

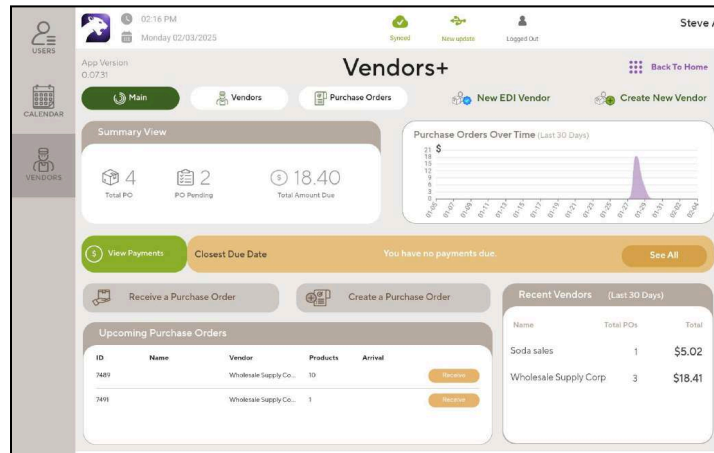


In addition to being added to the purchase order, the unexpected product will also be added to your pricebook and inventory systems. If the product was not previously tracked in inventory, it will be tracked now.

The Panther will then return you to the **Receive a Purchase Order** window.



If you are done receiving POs, tap cancel and you will be brought back to the Vendor + main screen.



You will now be able to then go to your POS or to the merchant portal and check the pricebook for inventory count or to the inventory tile and check the inventory there.

# Enhancements

A number of bug fixes and minor enhancements have been made in this release.

## **End-of-day report text change**

The "Transactions" value in the EODR Summary section now only displays baskets and does not include baskets that are for refunds.

The Transactions Summarized Data Table will now show the total number of transactions, including all baskets.

## **Register/Basket Details**

When a basket is put on hold and you go to restore the basket by tapping on the basket - please note that the CLOSE button has been removed and replaced by a back arrow to the left of Basket Details.

February 2025