

Sending an Order to an Unmanaged Vendor

User Guide > Unmanaged Vendors & Items

Please note: It is important to set up unmanaged vendors and items in the way we have outlined previously to ensure that things like reports and orders function properly.

Also: The process for putting together an order on the mobile scanner for unmanaged and managed vendors/items is the same. If you need a reminder on how to put together an order on the mobile scanner, please use our Online Knowledge Base for many helpful tutorials.

1. Starting on the OrderDog Portal, hover over the "Purchasing" tab. Then select "Purchase Orders" from the drop-down menu.

OrderDog									
Home	Inventory	Purchasing	Sales	P	Shopping				
Home		Purchase Orders							
		Re-Order WkSheet							
Annou	ncements fro	Re-Order WkSheet (Legacy)							
Vendor Spotlights									

2. Locate your order on the "Purchase Orders" page.

			j								*** Impersonating 1348
Home	Inventory	Purchas	ing	Sales	Taxes	Shopping	Reports	Account Setting	gs Contact/Support		
Purchas	ing										
Summar	У	F	ourcha	ise Orde	ers - Oper						
Open	Orders (15))	Send			▼ Go	Ad	d New 中			
Active	e Orders (17	7)			PO ID				Company	Cre –	Sent Rev
- 1 N	lot Reviewed			[T		[T		
- 0 N	lot Shipped		0								
- 16	Not Received			P -	3084		Δ	i i i i i i i i i i i i i i i i i i i	Example Un-Managed Vendor	04/04/24 09:46	AM
Closed	d Orders			P :	3082		DA	, 🥥 I	JNFI - Philadelphia (Select Nutrition)	04/03/24 02:23	PM
L				P :	3081		D	e 1	Nutraceutical - Better Being Co	04/03/24 02:22	РМ
Helper T	ools			P :	3080		DA		Now Foods	04/03/24 02:22	PM
0	eierte (n)				3079		۸	a 1	Medafood	04/03/24 02:22	PM

You can handle an unmanaged vendor order in a few different ways from here:

Sending Via Fax

You should have entered the unmanaged vendor's fax number when you were first setting up their account if they had one.

1. If you need to review the order or make any changes before sending it, you can click the pencil and paper icon next to the order. Be sure to press "Save Changes" when you're done.

PO ID			Company
			T
	۸	0	Example Un-Managed Vendor
3082		۲	UNFI - Philadelphia (Select Nutri
			Nutraceutical - Better Being Co

2. If you're ready to send the order via fax, check the box next to the PO ID, and next to the "Send" option, press the "Go" button.

F	urcha	se Ord	lers - Open		1		
	Send			🔹 🖌 🗸	Add Net	w 🔶	
			PO ID				Company
	K			T			T
	~	P	3084		Δ	0	Example Un-Managed Vendor
	\square	1	3082				UNFL - Philadelphia (Select Nut

3. The order will be faxed to the unmanaged vendor, and the order will move to your "Active Orders".

Summary	Purchas	se Orders	- Active							
Open Orders (14)	Move	To Closed		▼ Go 🔶	Add New					
Active Orders (18)		P) ID			Company	Cre	Sent -	Rev	Ship
- 1 Not Reviewed				T		T				
- 0 Not Shipped		-								
- 16 Not Received		Q, 30	34		Δ 🔶	Example Un-Managed Vendor	04/04/24 09:46 AM	04/05/24 03:45 PM		
Closed Orders		Q 30	35		8 🥥	Pedestrian Project	04/04/24 11:25 AM	04/04/24 11:26 AM	4/4/24	4/4/24
		୍କ 30	72		I) 🥥	Pedestrian Project	04/03/24 09:29 AM	04/03/24 09:30 AM	4/4/24	4/4/24

NOTE: Because the vendor is not managed by OrderDog, you will not be able to see when the vendor has marked the order as reviewed or shipped through the system.

4. When you receive the order through the mobile scanner and upload it, it will move the order to "Closed Orders".

Sending Via Print/Email

If the vendor does not have a fax number, you can still print a pdf of the order and send it to the unmanaged vendor for them to fulfill.

You should have checked the "FAX" box when first setting up the unmanaged vendor's account. Even if the vendor does not have a fax number, it is necessary to check this box so you are able to process this PO and later receive it on the mobile scanner, rather than have to receive it using the blank document method.

1. Click the pencil and paper icon to review/edit the unmanaged order. Be sure to press "Save Changes" if you do edit the order at all.



2. When you're ready, click the "Print This Page" option in the upper right corner of the pop out.

📄 PO 3087 - Example Un-Managed Vendor									ъs.	
Purchase Order - EDIT									Prin	t This Page
Vendor								Purch	ase Ord	er
Example Un-Managed Vendor							PO ID	308	37	
John Doe Phone: 123-456-7890 1234 Street Name Fax: City Name, AL12345 Managed: No							Order I Date	D 115 4/5	23583 /2024 3:51 PM	
Email: johndoe@example.com										
Bill To	3	Ship To			±					
Account #	Alt PO #	Terms		Discount	Ser	nd PO Via				
EX1234 - Main 👻		Credit Card 🔹		0 %	FA	Х	•			
ID Brand	Description		Size	UPC	CS OH	Qty 🔺	Order	Price	Disc Amt	Total
T	7	T	T							
33333333333 Example Un-Managed	/endor Unmanaged Item Example 🔍			3333333333333	4	4	4	\$0.00	\$0.00	\$0.00
333333444444 Example Un-Managed E	Brand Another Item 🔍			33333444444	3	7	7	\$49.99	\$0.00	\$349.93
I									2 items i	n 1 pages
Special Instructions:								Subtotal		\$349.93

3. Under the "Printer" option, change it to the "PDF" option. This will save a file directly to your computer for you to be able to email to the unmanaged vendor.

Print ? Total: 1 page	Vendor Example Lip Manag	and Vandor			-	Purchase C	Order
Printer	John Doe 1234 Street Name City Name, AL12345	Phone: 1 Fax: Managed: N	23-456-7890 o		PO ID Order ID Date	3087 11523583 4/5/2024 3:5	1 PM
Save as PDF	Email: johndoe@example	.com					
Save as FDI	Bill To		🛨 Shi	ір То			±
Layout	Account # EX1234 - Main	Alt PO #	Terms Credit C	ard	Discount	Send PO Via FAX	
O Portrait					Q	ty	Disc
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O All	U333333444444 Exam Mana	aged Brand	nother Item 🤍	3333334444	144 3 7	7 \$49.99	\$0.00\$349.93
O P.0 1-5 8 11-13	1 P	age size: All				1	titems in 1 pages
	Special Instructions:					Subtotal	\$349.93
More settings						Discount/Credit	\$0.00
more settings o					-	Tax	\$0.00
Print using system dialog (Ctrl+Shift+P)						Shipping	\$349.93
						PUEP FOTAL	2002
Save Cancel							

4. Once you have saved the pdf to your computer, exit out of the pop-out, check the box next to the order, and press "Send Order" to move the order to your "Active Orders".

F	ourchas	e Orc	ders - Open				
	Send			▼ Go ■	Add New	+	
			P) ID				Company
	4			T			T
		Ŗ	3087			0	Example Un-Managed Vendor
		P	3065		Δ.	0	Bluebonnet
			2080			4	Now Foods

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YOU'RE DONE!

If you have any questions or concerns regarding this tutorial, or any other inquiries, please feel free to contact us at:

Email: support@orderdog.com

Call: 1-866-673-3736

Our hours: 8 AM – 6 PM CST

Monday – Friday

After Hours Support Available

Visit our website for more tutorials and resources: <u>https://orderdog-inc.kayako.com/</u>

