

Portal

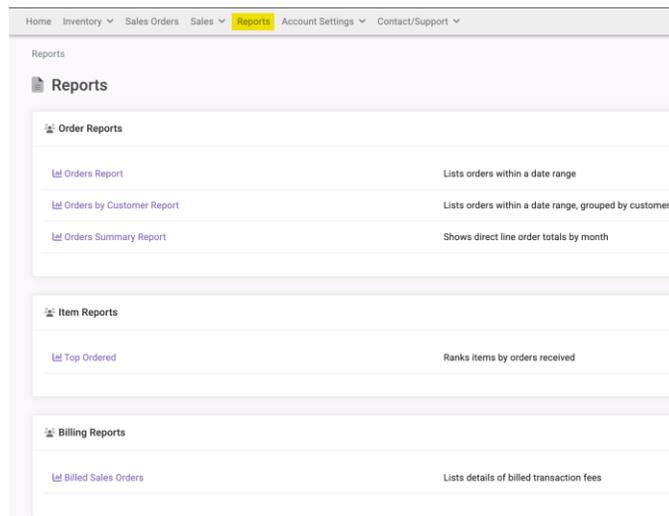
Release Update v4.31.66– February 25, 2026

New + Improved

New Supplier Reports

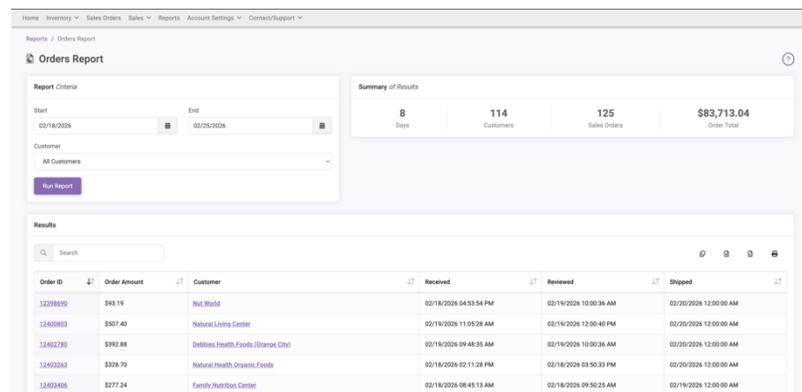
We’re excited to announce that we’re releasing out a fresh set of reports tailored specifically for our supplier partners. These reports are designed to empower you with more visibility. They also seamlessly accompany the dashboard by allowing one to quickly and easily drill down to view supporting details. Each report can easily be searched, filtered, sorted, and exported in various formats.

Below are the reports with some accompanying highlights (simply select the “Reports” option from the menu bar):



Orders Report – Highlighted Features

- Displays every order that was sent within the date range
- Date range is based on when the order was “Received”
- Easily audit the fulfilment history of any order, particularly whether orders are being reviewed and shipped in a timely manner
- Ability to filter by a specific customer
- Ability to drill into any Sales Order
- Export results



Orders by Customer Report – Highlighted Features

- Displays all customers that orders were received from within the date range
- Date range is based on when the order was “Received”
- Ability to drill down and view all the orders that contributed to the customer’s totals, by selecting the # orders or the total ordered (\$)
- Ability to filter by a specific customer
- Ability to see when the last Sales Order was received and to drill into seeing the order
- Export results

Customer Name	Last Sales Order	Last Order Date	# Orders	Total Ordered
M.H. Mothers Cookbook Nutrition	12274588	01/26/2025 11:43:57 AM	3	\$2,658.74
M.H. Mothers Cookbook Nutrition	12272259	01/23/2025 09:03:45 PM	2	\$1,859.34
M.H. Mothers Cookbook Nutrition	12266253	01/14/2025 05:01:29 PM	1	\$2,598.81
A to Zinc Nutritional Shop	12264643	01/17/2025 05:53:26 PM	2	\$5,385.20

Orders Summary Report – Highlighted Features

- Displays totals for each customer that sent orders, by month
- Date range is based on when the order was “Received”, and allows a max of 6 full months (defaults to 3-month range when accessing it from the reports page)
- Perfect for gauging the ordering behavior for each customer over time
- Ability to drill down and view all the orders that contributed to the customer’s totals, by selecting the # orders or the total ordered (\$)
- Ability to filter by a specific customer
- The dashboard also includes a link to this report that defaults the date range to 6 months
- Export results

Customer	# Dec 2025	\$ Dec 2025	# Nov 2025	\$ Nov 2025	# Oct 2025	\$ Oct 2025
Abundant Life Health Foods	4	\$3,254.87	1	\$2,051.88	2	\$2,783.44
Advanced Health & End	3	\$9,836.83	2	\$1,922.00	1	\$5,026.24
Arma Health Food Center & Mkt - Dallas (R1)	2	\$2,150.20	2	\$924.16	1	\$2,488.71
Arma Health Food Center & Mkt - Waukegan (R2)	4	\$3,814.13	1	\$2,418.02	1	\$2,202.29
Aside A Day Health World	1	\$1,638.21	-	-	2	\$3,498.50
Back To Nature	2	\$478.78	4	\$1,095.43	3	\$754.81

Top Ordered Report – Highlighted Features

- Displays the ranking of all items that were ordered within the date range
- Date range is based on when the order was “Received”
- Perfect for gauging the ordering behavior by item
- Items removed from the catalog will display as “Deleted”
- The dashboard also includes a link to this report that defaults the same date range it’s using to create visibility into the ranking of every item
- Export displayed results (select “All” from the show paging option to export the entire ranking)

Ranking	Item ID	Brand	Item Name	Quantity Ordered
1	00001	CLEAR PRODUCTS	Clear Trimulus	137
2	00002	AMAZON THERAPEUTIC LABORATORIES	Chanca Piedra (Stone Breaker) Liquid Extract	137
3	C00005	Bluebonnet	VITAMIN D3 + K2	135
4	W00001	WORLD ORGANICS	Chlorophyll 100 mg Liquid	131
5	W00002	Solaray	Women C with Rose Hips Acetate, Time-Release	131
6	S00002	SOURCE NATURALS	Ultra-Mag™	129
7	S001424	(DELETED)	(DELETED)	128

Billed Sales Orders – Highlighted Features

- Modified this existing report so it can be search, sorted, and exported

Order ID	Invoice ID	Buyer Name	Sent Date	Ship Date	Order Total	Shipping	Billable Amt	Bill Type	Bill Rate	Bill Amt
12327886		GA OrderDog, Inc	12/17/2025 10:09:19 AM -06:00	1/6/2026 10:15:00 PM -06:00	\$1,104.46	\$0.00	\$1,104.46	No Charge	0.0000	\$0.00
12334076		OrderDog Demo Retailer #2	12/22/2025 10:52:23 PM -06:00	1/12/2026 10:15:00 PM -06:00	\$72.26	\$0.00	\$72.26	No Charge	0.0000	\$0.00
12300186		GA OrderDog, Inc	1/14/2026 4:31:37 AM -06:00	1/14/2026 4:36:45 AM -06:00	\$165.18	\$0.00	\$165.18	No Charge	0.0000	\$0.00
Total:					\$1,341.90	\$0.00	\$1,341.90			\$0.00

The following permissions can be used to govern whether a specific employee can access the supplier reports:

- Permission: Reports – Order Reports (used for the following reports)
 - Orders Report
 - Orders by Customer Report
 - Order Summary Report
- Permission: Reports – Item Reports (used for the following report)
 - Top Ordered
- Permission: Reports – Billing History (used for the following report)
 - Billed Sales Orders

New Customer Import

We’re excited to announce that we’re releasing out to our retail partners the ability to import customers. We recognize that your customers are important to you, so we wanted to create a way for you to quickly upload new customers or update several existing customers.

Below are some highlights regarding the new customer import:

- An import button will now display on the customers page, selecting it will lead you through guided steps to import customers
- When updating existing customers, it’s recommended to export the customers, then import them
- When importing new customers, it’s recommended to download the import template file, so all the columns can be mapped
- All the columns must be mapped to complete the import
- If a field is imported as blank, then it will remove the existing contents for that customer’s field
- The customer import tool is an excellent way to correct the store credit balance of any customer
- It can be used to correct the customer’s reward balance as well

Name	Customer Group	Phone	Email	\$ Min Sales	\$ Min Visits	Store Credit	Reward Points	Actions
Fred Sanders2		(204) 559-9912		\$0.00	0	\$0.00	321.88	

All Imports Now Support Excel Spreadsheets

We're excited to say that whether you're importing items, discounts, or customers, you can now easily do it by importing excel spreadsheets. Going forward, an excel spreadsheet is the preferred file format when using the import tool. It will still support CSV file formats but excel is preferred.

Sales by Receipt Report - Improvements

We're happy to see that our retail partners are heavily using the Sales by Receipt report and saw some areas where it could be modified to become even more valuable.

Some areas where the report has been improved upon are as follows:

- Made it easier to search for transactions related to a specific customer. Can now search using any of the following criteria (results based on contains):
 - Customer ID
 - First & Last Name (incredibly useful)
 - First Name
 - Last Name
 - Alt ID
 - Phone
 - Mobile
 - Email
- When searching for a customer, the dropdown displays the following for each customer in the dropdown list for user to select:
 - Customer ID - First then Last Name (Alt ID)
 - Phone
 - Mobile
 - Email
- The customer column has been modified to display the customer's first & last name with a link to view the customer's record

Filter by Customer

happy cust

1894 - Happy Customer (Alt ID: 1000)

Phone: 2106867273

Mobile: 2106867272

Email: happy@email.com

Results

Search

Receipt #	Status	Date & Time	Cashier #	Customer	Net Sales	Total Tax	Total Sales	Margin
R22-53-33	P	02/13/2026 04:18 PM	3		\$0.00	\$0.00	\$0.00	0.00 %
R22-53-32	P	02/13/2026 04:18 PM	3		\$0.00	\$0.00	\$0.00	0.00 %
R22-53-31	P	02/13/2026 04:03 PM	3		\$23.99	\$4.11	\$28.10	100.00 %
R44-273-25	P	02/13/2026 02:05 PM	3	Happy Customer	\$49.34	\$0.00	\$49.34	79.39 %
R44-273-24	P	02/13/2026 02:01 PM	3		\$44.98	\$3.71	\$48.69	100.00 %
R44-273-23	P	02/13/2026 01:59 PM	3	Happy Customer	\$37.49	\$6.42	\$43.91	100.00 %

- When using the show details option (found under the more options section), the following changes were made:
 - Made it look prettier
 - Liability, misc sale, and store coupon items won't have clickthrough link
 - Manually Discounted items on POS will display icon

Results

Receipt #	Status	Date & Time	Cashier #	Customer	Net Sales	Total Tax	Total Sales	Margin
R44-273-14	P	02/12/2026 01:00 PM	3	Happy Customer	\$7.26	\$1.40	\$8.66	100.00 %
Details								
Item ID	Item Name	Quantity	Price	Discount	Extended Price	City Tax	County Tax	State Tax
897060002088	CHOCOLATE + PEANUT BUTTER	1	\$2.33	\$0.26 	\$2.33	\$0.19	\$0.05	\$0.16
897067002203	Cleaner Spray Fruit Veggie	1	\$5.84	\$0.65 	\$5.84	\$0.48	\$0.13	\$0.39
Store Coupon	Store Coupon	1	-\$0.91	\$0.00	-\$0.91	\$0.00	\$0.00	\$0.00
Gift Card	Gift Card	1	\$10.00	\$0.00	\$10.00	\$0.00	\$0.00	\$0.00
Store Credit	Store Credit	1	\$10.00	\$0.00	\$10.00	\$0.00	\$0.00	\$0.00

- When using the show payments option (found under the more options section), the following changes were made:
 - Made it look prettier
 - All payments will be grouped together
 - When filtering transactions by payment that payment will be highlighted

Results

Receipt #	Status	Date & Time	Cashier #	Customer	Net Sales	Total Tax	Total Sales	Margin
R44-273-25	P	02/13/2026 02:05 PM	3	Happy Customer	\$49.34	\$0.00	\$49.34	79.39 %
Payments								
Tender	Amount							
Reward Points	\$1.00							
EBT	\$1.00							
EBT Cash	\$1.00							
Check	\$1.00							
Debit	\$1.00							
Credit	\$1.00							
Cash	\$40.00							
SaveNaturally	\$1.00							
Gift Card	\$1.00							
Bottle Deposit	\$1.00							
Mfg Coupon	\$1.00							
Store Credit	\$1.00							