



Portal

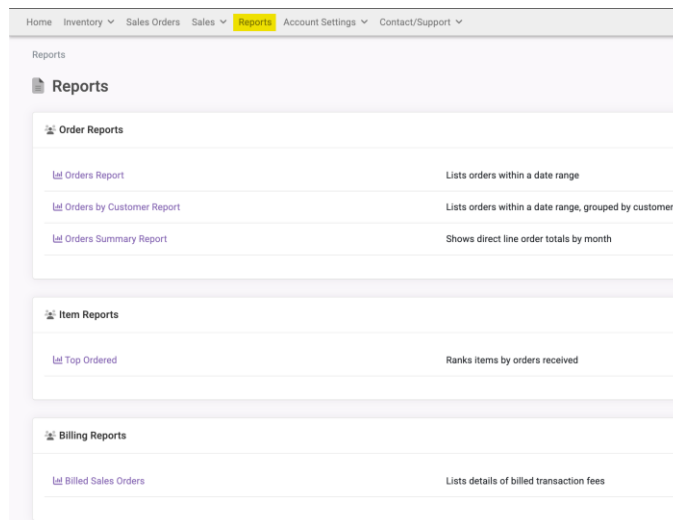
Release Update v4.31.66– February 25, 2026

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

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Orders Report

Report Criteria

Start

02/18/2026

End

02/25/2026

Customer

All Customers

Run Report

Summary of Results

8

Days

114

Customers

125

Sales Orders

\$83,713.04

Order Total

Results

Q Search

Order ID

Order Amount

Customer

Received

Reviewed

Shipped

12295050

\$93.19

Nat World

02/18/2026 04:53:54 PM

02/19/2026 10:00:36 AM

02/20/2026 12:00:00 AM

12400803

\$507.40

Natural Living Center

02/18/2026 11:05:28 AM

02/19/2026 12:00:40 PM

02/20/2026 12:00:00 AM

12402780

\$392.88

Debbies Health Foods (Omanee City)

02/19/2026 09:48:35 AM

02/19/2026 10:00:36 AM

02/20/2026 12:00:00 AM

12402363

\$326.70

Natural Health Organic Foods

02/18/2026 02:11:28 PM

02/18/2026 09:50:33 PM

02/20/2026 12:00:00 AM

12403406

\$277.24

Family Nutrition Center

02/18/2026 08:45:13 AM

02/18/2026 09:50:25 AM

02/19/2026 12:00:00 AM

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 |
|----------------------------------|------------------|------------------------|----------|---------------|
| U16 Mothers Customized Nutrition | 12374589 | 01/26/2025 11:43:57 AM | 3 | \$2,658.74 |
| U47 Mothers Customized Nutrition | 12373250 | 01/23/2025 09:09:45 PM | 2 | \$1,809.34 |
| U52 Mothers Customized Nutrition | 12366253 | 01/14/2025 05:01:20 PM | 1 | \$2,598.61 |
| A to Zinc Nutritional Shop | 12364543 | 01/17/2025 05:52:36 PM | 2 | \$5,305.20 |

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 | \$2,254.67 | 1 | \$2,051.88 | 2 | \$2,781.44 |
| Advanced Health & Food | 3 | \$9,836.83 | 2 | \$1,922.09 | 5 | \$6,098.24 |
| Arma Health Food Center & More... (Dallas, TX) | 2 | \$2,150.50 | 2 | \$904.56 | 1 | \$2,486.71 |
| Arma Health Food Center & More... (Wheaton, IL) | 4 | \$3,814.13 | 1 | \$2,418.02 | 1 | \$2,202.29 |
| Arma & Day Health World | 1 | \$1,608.01 | - | - | 2 | \$3,498.09 |
| Back To Nature | 2 | \$478.78 | 4 | \$1,095.43 | 3 | \$754.61 |

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 | 000001 | CLEAR PRODUCTS | Clear Tintulus | 137 |
| 2 | 000013 | AMAZON THERAPEUTIC LABORATORIES | Chancia Pledra (Stone Breaker) Liquid Extract | 137 |
| 3 | C30000 | Bluebonnet | VITAMIN D3 + K2 | 135 |
| 4 | W00001 | WORLD ORGANICS | Chlorophyll 100 mg Liquid | 131 |
| 5 | W00002 | Solaray | Vitamin C with Rose Hips Acetate, Timed Release | 131 |
| 6 | 000002 | SOURCE NATURALS | Ultra Mag™ | 129 |
| 7 | 000103 | (DELETED) | (DELETED) | 128 |

Billed Sales Orders – Highlighted Features

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

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Contact/Support

Reports
Billed Sales Orders

Billed Sales Orders

Report Criteria

Company
OrderDog Demo Supplier #2

Invoice Period
2/1/2026

Run Report

Summary of Results

| | | | |
|-------------|-------------------------------|---------------------------|-------------------------|
| 3 Orders | \$0.00 Monthly Service Fee | \$0.00 Minimum Billing | \$0.00 Total Charges |
|-------------|-------------------------------|---------------------------|-------------------------|

Minimum Billing

| Order ID | Invoice ID | Buyer Name | Sent Date | Ship Date | Order Total | Shipping | Billable Amt | Bill Type | Bill Rate | Bill Amt |
|----------|------------|---------------------------|------------------------------|-----------------------------|-------------|----------|--------------|-----------|-----------|----------|
| 12272686 | | QA 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 |
| 12284070 | | OrderDog Demo Retailer #2 | 12/22/2025 10:52:23 PM 06:00 | 1/13/2026 10:15:00 PM 06:00 | \$73.26 | \$0.00 | \$73.26 | No Charge | 0.0000 | \$0.00 |
| 12285168 | | QA 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

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Account Settings
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Sales / Customers

72

New Customers - Last 30 Days

0 - Today

1 - Past Week

1,225

Total Customers

Keyword Search

Search Customers

🔍

Advanced ▼

Actions ▼

Show Deleted

| <input type="checkbox"/> | Name | Customer Group | Phone | Email | 6 Mon Sales | 6 Mon Ytds | Store Credit | Reward Points | Actions |
|--------------------------|---------------|----------------|----------------|-------|-------------|------------|--------------|---------------|---------|
| <input type="checkbox"/> | Fred Sanders2 | | (949) 555-0912 | | \$0.00 | 0 | \$0.00 | 221.68 | ... |

Home
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Contact/Support
▼

File Import / Customer

Customer Import

🔍

🔗

🔗

Select File

⬆

Choose file

or drag and drop file here

Settings

Map

Validate

Review

Finish

File Name

Last Modified

Type

Lines

N/A

N/A

N/A

N/A

Last Upload: 5/16/2026 6:40 by happy Employee1 (100% complete with 0 errors)

Back

✖ No file selected

Next

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 | | | | | | | | | | |
|-------------------------------------|--------|---------------------|-----------|----------------|-----------|-----------|-------------|----------|--|--|
| <input type="text" value="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 % | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <div>Details</div> <table> <tr> <th>Item ID</th><th>Item Name</th><th>Quantity</th><th>Price</th><th>Discount</th><th>Extended Price</th><th>City Tax</th><th>County Tax</th><th>State Tax</th></tr> <tr> <td>897060002088</td><td>CHOCOLATE + PEANUT BUTTER</td><td>1</td><td>\$2.33</td><td>\$0.26 </td><td>\$2.33</td><td>\$0.19</td><td>\$0.05</td><td>\$0.16</td></tr> <tr> <td>897067002203</td><td>Cleaner Spray Fruit Veggie</td><td>1</td><td>\$5.84</td><td>\$0.65 </td><td>\$5.84</td><td>\$0.48</td><td>\$0.13</td><td>\$0.39</td></tr> <tr> <td>Store Coupon</td><td>Store Coupon</td><td>1</td><td>-\$0.91</td><td>\$0.00</td><td>-\$0.91</td><td>\$0.00</td><td>\$0.00</td><td>\$0.00</td></tr> <tr> <td>Gift Card</td><td>Gift Card</td><td>1</td><td>\$10.00</td><td>\$0.00</td><td>\$10.00</td><td>\$0.00</td><td>\$0.00</td><td>\$0.00</td></tr> <tr> <td>Store Credit</td><td>Store Credit</td><td>1</td><td>\$10.00</td><td>\$0.00</td><td>\$10.00</td><td>\$0.00</td><td>\$0.00</td><td>\$0.00</td></tr> </table> | | | | | | | | | 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 |
| 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 | | | | | |