

# Thrive Inventory User Guide



## Thrive Inventory

### Single Location/Integration - Connect Your Integration

- ☐ Log in to your Thrive Inventory Account
- ☐ Connect your integration
- ☐ Import existing inventory data
- ☐ Set the Sync Settings for your integration

### Multiple Locations/Integrations - Connect Your Integrations

- ☐ Log in to your Thrive Inventory Account
- ☐ **Please reach out to your Account Executive team** to ensure you get the correct setup using the green chat bubble or email us at [help@thrivemetrics.com](mailto:help@thrivemetrics.com)
- ☐ Identify the integration/location with the inventory you want to build your catalog off of
  - \*This should be your most accurate pool of inventory
- ☐ Connect all of your integrations and/or locations
- ☐ Import existing inventory data from your selected integration
- ☐ Set the Sync Settings for each of your locations/integrations

## The Basics

- ☐ [Add and name](#) each of your locations
- ☐ [Add addresses](#) for each location
- ☐ Complete your [User Profile](#)
- ☐ Set [email preferences](#)
- ☐ Add your [company logo](#)
- ☐ Check that your [tax rates](#) imported correctly from your POS
- ☐ Connect with your Account Executive to schedule a demo

## Access Control: Invite Your Team

- ☐ [Invite team members](#) with their email
- ☐ Set [individual user permissions](#)

## See Where Your Inventory Stands

- ☐ See what your most profitable product is with your [Sales Report](#)
- ☐ Identify slow-moving products with your [Dead Inventory Report](#)
- ☐ Create a [Custom Report](#)

## Inventory Set Up

- ☐ Set min/max [Re-Order Levels](#) using the [Bulk Spreadsheet Upload](#)
- ☐ Add [Default Costs](#) and [Lot Costs](#)
- ☐ Set condition-based [Alerts](#)

## Vendor Management: Easily Manage Suppliers

- ☐ Upload [key vendor information](#) with the [Bulk Spreadsheet tool](#)
- ☐ [Assign products](#) to vendors
- ☐ [Connect vendors](#) to locations

## Purchase Orders: Automate Receiving New Inventory

- ☐ Create a [Purchase Order](#)
- ☐ Send a Purchase Order directly to your vendors via email
- ☐ [Receive inventory](#) from a Purchase Order

## Stock Counts: Keep Your Inventory in Check

- ☐ Complete a Stocktake cycle count
- ☐ Make any notes in Shopventory regarding any discrepancies
- ☐ Publish to sync new stock counts across all your integrations

## Bundles, Variants & Modifiers: Simplify Inventory Tracking

- ☐ Create a product Bundle
- ☐ Create a Modifier
- ☐ Add a Variant

# Thrive Wholesale

## Grow Your Wholesale Business

- ☐ Import your Wholesale customers
- ☐ Create a Price List
- ☐ Add Custom Net Terms
- ☐ Send your first Wholesale Invoice

# Thrive Metrics

## Customizable Reporting Dashboards

- ☐ Set a Sales Goal
- ☐ Create a customized Dashboard

# Change The Way You Do Business

Enter a form of payment so you experience uninterrupted service once your free trial ends. Don't worry, we won't charge you until after your trial has ended.

- ☐ Add ACH and a credit card to your account
- ☐ Select a plan

# Additional Resources

## HELP CENTER

Extensive documentation and helpful material is available 24/7 at [help.thrivemetrics.com](https://help.thrivemetrics.com).

## IN-APP ANSWERS

We've compiled the most frequently-asked questions and put the answers right where you need them - in the app itself.

## VIDEO TUTORIALS

Follow along as one of our customer care experts explains each feature of Thrive in detail.

## ONE-ON-ONE

Live chat, email and phone support is available from 9AM-7PM (US Eastern) on weekdays in English and Spanish.

# Connect With Your Account Executive

## Chat

For the quickest response, click on the green chat button in the bottom right-hand corner of your screen. 9AM - 7PM EST

## Text

Text us at 858-271-4000. 9AM - 8PM EST

## Email

Email us at [help@thrivemetrics.com](mailto:help@thrivemetrics.com)