Thrive Inventory User Guide

Powered by Shopventory

We know using a new tool for your business can seem a bit overwhelming at first. That's why we created this guide to walk you through your new account! This guide will help you optimize your inventory, simplifying your work and saving you time each day.

Thrive Inventory by Shopventory

Connect All Your Integrations

- [ ] <u>Log in</u> to your Thrive Account
- [ ] <u>Connect all of your integrations</u>
- [ ] <u>Import existing inventory data</u> from each integration
- [ ] Set the <u>Sync Settings</u> for each of your locations/channels

The Basics

- [ ] <u>Add and name</u> each of your locations
- [ ] <u>Add addresses</u> for each location
- [ ] Complete your <u>User Profile</u>
- [ ] Set <u>email preferences</u>
- [ ] Add your <u>company logo</u>
- [ ] Check that your <u>tax rates</u> 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 PAR Levels using the Bulk Spreadsheet Upload tool
- ☐ 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 updates 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 30-day free trial ends. Don't worry, we won't charge you until after your trial has ended including an additional 30-day money back guarantee.

- [ ] 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.shopventory.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-8PM (US Eastern) on weekdays in English and Spanish.

Customer Support

Chat

For the quickest response, click on the green chat button in the bottom right-hand corner of your screen. 9AM - 8PM EST

Text

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

Email

Email us at help@shopventory.com