



Vendor Guide

A complete, code-verified walkthrough of every VendIQ page
and feature available to vendors.

SEPTEMBER 2026

A comprehensive, code-verified walkthrough of every VendIQ page and feature available to vendors — from first login through day-to-day use. Every claim in this document was checked against the app's actual current behavior, not assumed from naming or prior docs.

Why it exists

Knowing your total sales for the day tells you less than you think. A great sales day at a market with a high booth fee, pricey ingredients, and a long drive can still lose money — and a quiet day with low costs can still be a real win. VendIQ's job is to show you the number that actually matters — net margin, per event and per location — not just top-line revenue.

When to use it

Two different moments, both covered:

- **In the field** — mid-event, on your feet, phone in hand — text a receipt photo, a voice memo, or a plain sentence like "\$50 booth fee" to VendIQ Go (§4), and it's logged before you've even packed up the booth.
- **At home or between events** — review what came in, fix anything miscategorized, connect your POS so sales sync automatically, and check Events Hub's Rolling P&L and Event Performance pages to see which markets or venues are actually worth returning to.

How it fits together

Three surfaces, one dataset — nothing logged through one is ever separate from the others:

- **Backroom** (§2) is the cost side — receipts and supply purchases, automatically sorted into COGS or Supplies.
- **Events Hub** (§3) is where cost and sales come together per event and per location, so you see real profitability, not just revenue.
- **Go** (§4) is how you log either one without opening the app at all — a text, a photo, or a voice memo, from wherever you are.

Settings (§1, §5, §6) and Billing (§7) round out the account side; §8 covers bringing in data you already have elsewhere, and §9 covers getting help.

Looking for a quick answer instead of the full walkthrough? Check the FAQ page, linked in the site footer and from Support.

Table of Contents

1. Getting Started: Settings → Account
2. Feature Walkthrough: Backroom
3. Feature Walkthrough: Events Hub
4. Feature Walkthrough: Go
5. Operational Preferences and Overhead: Settings → Preferences
6. Technical Setup: Settings → Go & Integrations
7. Monthly Subscription Management: Billing
8. Bringing Your Existing Data
9. Feedback and Support

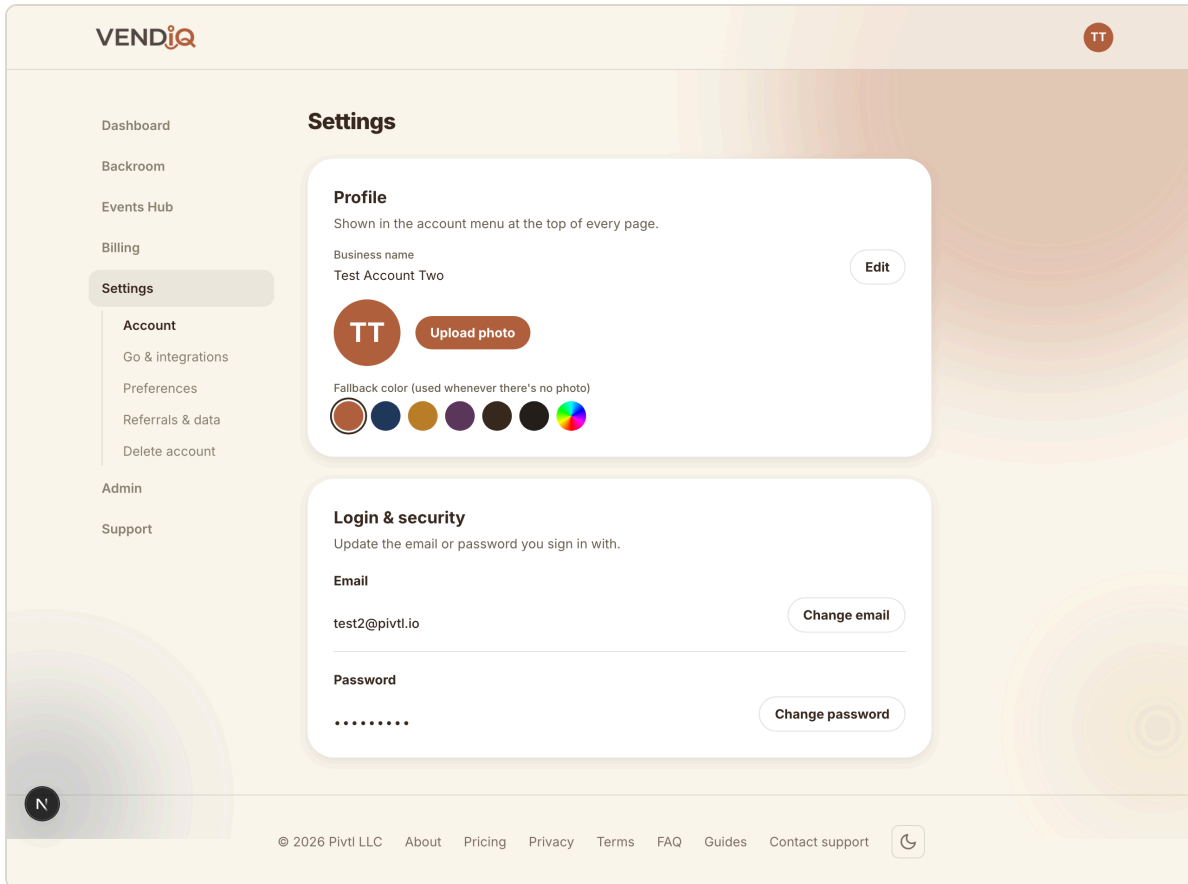
Quick Reference Checklist

New to VendIQ? Work through this list in order — each item links to the page with full detail.

- ☐ Set your business name and account icon color in Settings → Account. Go to page 5
- ☐ Confirm your login email and password are current in Settings → Account. Go to page 6
- ☐ Upload your first receipt to Backroom (photo or file) and review the extracted items. Go to page 9
- ☐ Know where Purchase History lives, in case you need to edit, delete, or reassign an item later. Go to page 10
- ☐ Create your first Setup in Events Hub before or after an event. Go to page 15
- ☐ Log a sale manually, or connect a POS so sales sync automatically. Go to page 14
- ☐ Check the "Texted-in, not linked to an event" list and attach anything waiting. Go to page 15
- ☐ Try texting in a sale or expense through Go — plain text, a photo, or a voice memo. Go to page 17
- ☐ Remember UNDO (within 10 minutes) and FIX for correcting a Go text after the fact. Go to page 19
- ☐ Add a phone number for VendIQ Go, and check the required consent box. Go to page 22
- ☐ Set your target margin percentage in Settings → Preferences. Go to page 20
- ☐ Add recurring overhead estimates — Overhead, Equipment, Insurance, Salaried labor. Go to page 21
- ☐ Connect Square, Clover, or Toast if you use a POS. Go to page 23
- ☐ Know your plan's monthly caps, and where to track usage from the account-icon dropdown. Go to page 24
- ☐ Review your billing plan and payment method on file. Go to page 26
- ☐ If you're switching from QuickBooks or a spreadsheet, import your past data. Go to page 29
- ☐ Know the difference between Feedback (account dropdown) and Support (nav/footer). Go to page 31

1. Getting Started: Settings → Account

Settings → Account (`/settings?section=account` , the default section) has two cards: **Profile** and **Login & security**. Every field on both cards is collapsed to a read-only row until you tap its own edit button — the button text differs by field, so don't look only for the word "Edit."



Settings → Account: Profile and Login & security cards

1.1 Setting your business name

The Profile card's **Business name** row shows "Not set" until you give it one. Tap **Edit**, type the name, tap **Save**. It saves instantly (a direct database write) and immediately updates the account menu and header — there's no confirmation step and no delay.

1.2 Updating your icon's fallback color

Also on the Profile card: when you haven't uploaded a photo, your account icon shows your initials on a solid color chip instead. A color-swatch picker on this same card lets you choose that fallback color. There's also an **Upload photo** button if you'd rather use a real photo — once you do, the color choice stops applying.

1.3 Where Login & security lives

The second card, **Login & security**, holds your **Email** and **Password** — each in its own collapsed row.

- **Email** — tap **Change email**, type the new address, tap **Send confirmation link**. Important: your email does **not** change immediately. You'll see "Check `<address>` for a confirmation link — your email won't change until you click it." Nothing on your account changes until you actually click that link.
- **Password** — tap **Change password**. You'll need your **current** password plus a new one (twice, to confirm). Submitting opens a confirm dialog — "Change your password? You'll need your new password the next time you sign in." — before anything actually changes. If you don't know your current password (e.g. it's saved in a password manager you can't check right now), there's a "Don't know your current password? Email me a code instead" link that verifies you a different way.

2. Feature Walkthrough: Backroom

2.1 General overview

Backroom tracks your COGS (cost of goods sold) and supply expenses — the cost side that feeds Event Performance's profitability numbers. The page is just two things stacked: a receipt uploader, and your Purchase History table.

VENDIQ

TT

Dashboard

Backroom

Events Hub

Billing

Settings

Admin

Support

Backroom

Automated COGS & Supplies categorization, from receipts and texted-in costs

Take a photo

Upload a file

JPEG, PNG, WEBP, or GIF — up to 10MB.

Or enter items manually

Purchase history

Export

Search item

Supplier

From

To

Any item name

Any supplier

mm/dd/yyyy

mm/dd/yyyy

Date	Line cost	Category	Event	Supplier	Receipt
» Thu, Aug 13, 2026	1 item	\$15.89	Supplies	\$15.89	
» Wed, Aug 12, 2026	1 item	\$40.14	COGS	\$40.14	
» Tue, Aug 4, 2026	1 item	\$95.91	COGS	\$95.91	
» Mon, Aug 3, 2026	1 item	\$69.30	Supplies	\$69.30	
» Sat, Jul 25, 2026	1 item	\$77.40	COGS	\$77.40	
» Fri, Jul 24, 2026	1 item	\$43.96	Supplies	\$43.96	
» Fri, Jul 17, 2026	1 item	\$37.77	COGS	\$37.77	
» Thu, Jul 16, 2026	1 item	\$140.52	COGS	\$140.52	
» Wed, Jul 15, 2026	1 item	\$29.20	Supplies	\$29.20	
» Tue, Jul 7, 2026	1 item	\$14.21	Supplies	\$14.21	
» Mon, Jul 6, 2026	1 item	\$49.20	COGS	\$49.20	
» Sat, Jun 27, 2026	1 item	\$26.41	COGS	\$26.41	
» Fri, Jun 19, 2026	1 item	\$56.61	COGS	\$56.61	
» Thu, Jun 18, 2026	2 items	\$102.53	COGS \$31.51 · Supplies	\$71.02	
» Wed, Jun 17, 2026	1 item	\$23.15	Supplies	\$23.15	
» Tue, Jun 9, 2026	1 item	\$53.38	COGS	\$53.38	
» Mon, Jun 8, 2026	1 item	\$36.16	Supplies	\$36.16	
» Sat, May 30, 2026	1 item	\$30.50	Supplies	\$30.50	
» Fri, May 22, 2026	1 item	\$25.16	Supplies	\$25.16	
» Thu, May 21, 2026	2 items	\$96.94	COGS	\$96.94	

← Prev

Page 1 of 13 (243 days, 263 items)

Next →

Total: \$15043.16

© 2026 Pivt LLC

About

Pricing

Privacy

Terms

FAQ

Guides

Contact support

Backroom: receipt uploader and Purchase History

2.2 Uploading a receipt for OCR via the web app

Two buttons: **Take a photo** or **Upload a file**. On most phones, "Take a photo" opens your camera directly and lets you capture up to 3 photos for one long receipt before processing (a one-time tip appears the first time, encouraging this for long receipts); "Upload a file" is a single file at a time. Accepted formats are JPEG, PNG, GIF, and WEBP — not HEIC, so iPhone users should double check their camera format if a photo upload fails. Photos are converted to grayscale automatically before processing, which measurably improves accuracy on faded thermal-printer receipts. Claude (Anthropic's AI) reads the receipt and extracts line items.

(Texting a receipt photo to VendIQ Go does the same extraction — see §4.2 — but skips this web upload step entirely.)

2.3 Reviewing what was extracted, before it's saved

Nothing is saved to Backroom until you confirm it. The review screen shows the purchase date/time, an optional supplier name, and every line item (name, quantity, unit cost, and a COGS/Supplies category) — all editable, with rows addable or removable. Category is the one field Claude actively guesses (defaulting to Supplies when it's genuinely unsure); everything else it fills in when confident and leaves blank when not. Tap **Save to inventory** to commit, or **Discard** to throw the whole scan away.

2.4 Editing items already committed

From Purchase History, each item's edit icon lets you change its assigned event, category, quantity, unit cost, or date — but not its name; the item name can only be set during the pre-save review step (2.3), not after. You can also select multiple rows and bulk-edit just the fields you check off, without touching the rest.

2.5 Manually entering COGS or supplies

The "**Or enter items manually**" link (next to the two upload buttons) opens the exact same review screen described in 2.3, just empty instead of pre-filled from a scan — same fields, same Save flow.

2.6 Purchase History — overview, edit, delete, assign

Items are grouped by day, each group showing its item count, total, and a COGS/Supplies subtotal split; expand a day to see individual lines. You can search by item name or supplier, and filter by date range. Each row shows which event it's attributed to (an explicit assignment you made, or — if you never assigned one — an automatic guess: the next Setup scheduled after the purchase date). From here you can edit (2.4), permanently delete (a real, unrecoverable delete — there's a clear warning), or reassign an item's event, individually or in bulk.

2.7 Exporting for tax filing

The **Export** button builds a CSV or Excel file from whatever's currently filtered in Purchase History, with a live row-count preview before you download. One thing to know: **exports are completely disabled during your trial** — they unlock once you're on a paid plan.

2.8 Bringing in historical data

Backroom itself has no import button — to bring in past purchase records from another accounting system or a spreadsheet, see §8. Imported inventory/purchase rows land in this same Purchase History table, indistinguishable from a scanned or manually entered one.

3. Feature Walkthrough: Events Hub

The left nav labels this "Setups," but the page itself is titled Events Hub — same feature, two names you'll see in different places.

Dashboard

Backroom

Events Hub

Setups

Locations

Performance

Billing

Settings

Admin

Support

Events Hub

Location & event-based P&L profitability engine

Connect a POS in [Settings](#), then open a Setup's Scorecard to sync its sales and see a real Event P&L.

Rolling 30-day P&L

Everything attributable to the trailing 30 days, compared to the 30 days before that.

Last 30 days

\$-2,724.15

\$1,775.85 sales – \$4,500.00 costs

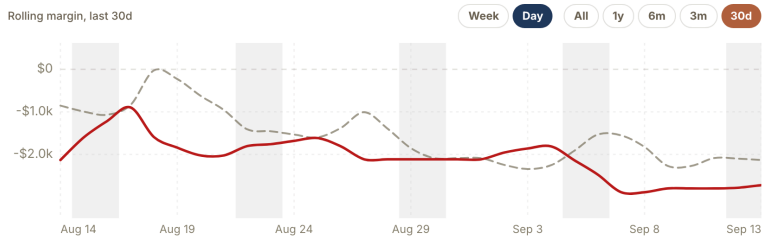
30 days before that

\$-2,132.95

\$3,189.22 sales – \$5,322.17 costs

▼ **\$591.20 (-28%) vs. the prior 30 days**

Rolling margin, last 30d



Margin by event, last 30d



Texted-in, not linked to an event

Go-texted or manually entered items with no nearby Setup to attach to — still counted in your rolling P&L, just not shown on any Setup's Scorecard.

Filter the "Attach to event" list

Storage unit rent

Aug 10, 2026, 12:00 AM · Supplies · Check

-\$90.00

Attach to event...

Part-time help

Aug 3, 2026, 12:00 AM · Labor · Cash

-\$89.96

Attach to event...

Vehicle maintenance

Jul 20, 2026, 12:00 AM · Supplies · Credit Card

-\$207.28

Attach to event...

Bulk ingredient restock

Jul 13, 2026, 12:00 AM · COGS · Check

-\$227.82

Attach to event...

Storage unit rent

Jul 6, 2026, 12:00 AM · Supplies · Cash

-\$90.00

Attach to event...

Prep assistant

Jun 22, 2026, 12:00 AM · Labor · Credit Card

-\$90.76

Attach to event...

Vehicle maintenance

Jun 15, 2026, 12:00 AM · Supplies · Check

-\$133.16

Attach to event...

Bulk ingredient restock

Jun 8, 2026, 12:00 AM · COGS · Cash

-\$255.71

Attach to event...

Part-time help

May 25, 2026, 12:00 AM · Labor · Credit Card

-\$118.76

Attach to event...

Prep assistant

May 18, 2026, 12:00 AM · Labor · Check

-\$108.72

Attach to event...

← Prev

Page 1 of 5 (50 items)

Next →

Log a sale manually

Not connected to a POS, or had a cash sale it wouldn't see? Log it here so it still counts toward your P&L.

Amount

612.00

Note (optional)

e.g. Saturday market, cash

Log sale

Your Setups

Export

Search name

Any Setup name

Location

Any location

From

mm/dd/yyyy

To

mm/dd/yyyy

Grand total

\$0.00 sales

\$0.00 costs

Loading...

Add a Setup

Name

e.g. Saturday Farmers Mkt

Location

No location

Start

mm/dd/yyyy, --:-- --

End (optional)

mm/dd/yyyy, --:-- --

Add Setup

© 2026 Pivtl LLC

About

Pricing

Privacy

Terms

FAQ

Guides

Contact support

Events Hub: Rolling P&L, texted-in items, and Setups table

3.1 General overview

Events Hub is where you watch overall business health over time, and also drill into any single event. The page stacks, top to bottom: the **Rolling P&L card** (health over time), a **"Texted-in, not linked to an event"** list (items needing your attention), a **manual sale entry** form, and your **Setups** table (each event, individually). Two more pages round it out: **Locations** and **Event Performance** (a cross-event comparison — see 3.9).

3.2 The Rolling P&L card — how to read it, filters

Two numbers side by side: "**Last N days**" vs. "**N days before that**", with the difference called out. Range buttons — **30d** / **3m** / **6m** / **1y** / **All** — change what "N" means for both numbers and for a "margin by event" bar chart below; a trend line underneath is always smoothed over a fixed 30 days regardless of which range you've picked, so the two summary numbers and the trend line can tell slightly different stories on purpose (the summary reacts to your selected range, the trend line never does). The bar chart directly below the trend line is deliberately *not* smoothed, so a single bad or great day still shows up as its own spike rather than getting averaged away.

This card includes everything attributable to the period — revenue from every sale (POS, manual, and texted-in) and costs from every expense, purchase, and your recurring overhead estimates (see §5.2) — whether or not it's ever been linked to a specific event.

3.3 How logged sales work

Two real paths, plus a third worth knowing about:

- **Manually** — the "Log a sale manually" form right on this page (see 3.4).
- **From a connected POS** — once you've connected Square, Clover, or Toast (§6.2), each individual Setup has its own "**Sync from** **<Provider>**" button on its Scorecard page, which also fires automatically the first time you open that Scorecard.
- **Texted in via VendIQ Go** — a sale texted or called in lands here too. See §4 for how that works.

3.4 How to manually enter a sale

Fill in **Amount** (must be greater than \$0) and an optional **Note**, then tap **Log sale**. That's the whole form. It doesn't try to guess which event it belongs to — see 3.6 for how attribution actually happens.

(For texting in a sale instead — e.g. from the floor of an event — see §4.2.)

3.5 How to edit existing sales or event data

- **The Setup itself** — Name, Location, Start, and End are editable from the Setups table's Edit button. Note: there's currently no way to set a Setup's booth fee or other flat expenses from this screen — the only way to set those today is a bulk data import (§8).
- **Individual sale/expense line items** — each Setup's Scorecard has a **Line items** section where you can edit a line's amount, category, or date, or move it to a different event (or detach it entirely). There is no delete button anywhere in Events Hub for a line item — if you need one gone rather than corrected, text **UNDO** within the correction window instead (§4.4).

3.6 Texted-in items that need classification

The "**Texted-in, not linked to an event**" list holds anything — texted or manually entered — that didn't land near enough to an existing Setup to auto-attach. These items still count fully toward your overall Rolling P&L; they just won't show up on any individual event's Scorecard until you attach them. Each row has an "**Attach to event...**" picker. If you never attach one, it stays counted at the whole-account level forever, invisibly, at the per-event level.

(The exact rule for what counts as "near enough" to auto-attach is covered in §4.5, since it's really a Go-texting-timing question.)

3.7 Setups — what they are, and creating them

A **Setup** is one specific occurrence of you doing business — a single market day, a festival booth, one appointment block. Create one with the "**Add a Setup**" form: Name, Location, Start time (required), End time (optional).

If you've connected Square, VendIQ can also detect a Setup for you automatically: two or more Square sales within a 30-minute window at a mapped Location, with nothing already running there, quietly creates a "draft" Setup and — if Go is active — texts you to confirm it. That draft behaves exactly like a normal Setup immediately; confirming it (by replying **CONFIRM** to the text, or from the confirmation banner on your Dashboard) is just a status label, not a gate on anything working. This auto-detection is Square-only today — Clover and Toast don't support it.

3.8 Locations, and how they differ from Setups

A **Location** is a reusable place — a specific market, venue, or festival site — with no time dimension of its own. A **Setup** is one specific occurrence at (optionally) one of those Locations, with its own start/end and its own sales/costs. One Location can host many Setups over time — "Main St Plaza" might have a new Setup every Saturday.

Create a Location from the Locations page, or inline while creating a Setup. Mapping a Location to one of your real Square locations is also what enables the auto-detection described in 3.7.

3.9 Event Performance — the Scorecard and the Performance page

This is really two separate screens working together:

- **Each event's Scorecard** (open any Setup) shows that one event's Sales, a cost breakdown (booth fee, other expenses, COGS, Supplies, Labor), and its Net margin — everything logged from 8 hours before that event started through 4 hours after it ended.
- **The Event Performance page** is the cross-event comparison — grouped **by location**, with average and total net margin per location, sorted best-to-worst, plus a flat list of every Setup. This is the view to use for deciding which recurring markets or venues are actually worth re-booking. A location showing several Setups but few with real revenue logged is a data-quality flag (missing sync or manual entry), not necessarily a bad venue — check "# with revenue" alongside the margin number.

The main Setups table also shows a **Daily Avg Margin** and **Profit %** per Setup, which normalizes multi-day events (so a 3-day festival compares fairly against a 1-day market) — a view the Performance page's raw totals don't give you.

4. Feature Walkthrough: Go

4.1 General overview

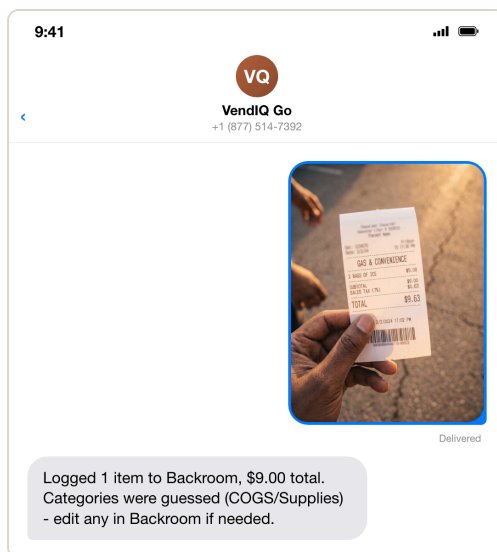
VendIQ Go lets you log a sale or expense by text or call, without opening the app at all. It's free on Plus and Enterprise, and a paid add-on on Lite. Whatever you log through Go routes automatically into the same real data Backroom and Events Hub already use — it's not a separate system.

4.2 What you can text in

Three real, fully-working input types:

- **A photo of a receipt** — scanned exactly the same way as a Backroom web upload (§2.2), just arriving by text instead. It lands in Backroom's Purchase History.
- **A voice memo** — say something like "spent forty on ice, cash" as an audio message; VendIQ transcribes it and treats it identically to typing the same words.
- **Plain text** — "booth fee \$50 cash," "\$612 sales today," and similar.

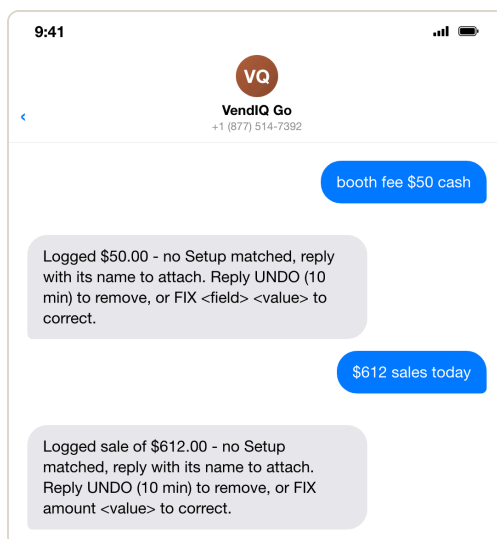
Texting in a receipt photo looks like this:



Texting a receipt photo to VendIQ Go — it lands in Backroom, same as a web upload

4.3 How confirmations work

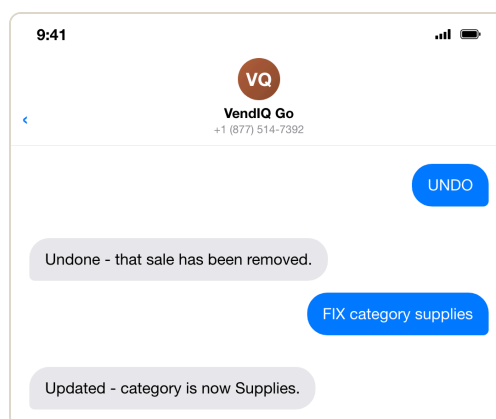
Every text gets a real reply. A receipt photo gets a line-item count and total, with a note that categories were guessed and can be corrected in Backroom. An expense or sale gets a line like "Logged \$50.00 to Saturday Market" (if it matched an event) or "Logged \$50.00 — no Setup matched, reply with its name to attach" (if it didn't) — either way, also a reminder that you can reply **UNDO** or **FIX** if something's wrong. Two plain-text examples, back to back:



A texted expense and a texted sale, each with a real confirmation reply

4.4 Making changes to something just texted in

Reply **UNDO** within **10 minutes** to remove your single most recent logged item — this is also the *only* way to delete a Go-logged item at all; there's no delete button for it in the app. Reply **FIX** to correct one in place instead — for example, "FIX category supplies" or "FIX amount 45.50" — with no time limit tied to the correction itself (though FIX only ever targets your most recent item, same as UNDO). Both commands, in a real exchange:



UNDO removes your most recent item; FIX corrects one in place

4.5 How event attribution works around the time of an event

When you text in an expense or sale, VendIQ checks whether it falls inside a real attribution window around any of your Setups: **starting 8 hours before** that Setup's start time, through **4 hours after** it ends (or after its start time, if it has no set end). If exactly one Setup matches, it's attributed automatically. If none match, it lands in the "texted-in, not linked" list (§3.6) — reply with the event's name within 30 minutes and it'll attach for you. If more than one Setup matches (two events overlapping in time), you'll be asked which one you meant.

(This exact time-window rule applies to texted/typed expenses and sales. A texted-in receipt photo attributes differently — see §2.6 — resolved to whichever event comes up next chronologically, not by this same before/after window.)

4.6 Adding or changing phone numbers

See §6.1 — phone number setup lives in Settings → Go & integrations, alongside the required consent step.

5. Operational Preferences and Overhead: Settings → Preferences

VENDiQ TT

Dashboard
Backroom
Events Hub
Billing
Settings
Account
Go & integrations
Preferences
Referrals & data
Delete account
Admin
Support

Settings

Target margin

Used to color-code the Net Margin figure on your Daily Dashboard — green at or above this, red well below it. Change it anytime; nothing here is locked in.

Target margin %
25 % **Save**

Recurring cost estimates

Optional, rough estimates — each gets folded flat into your rolling 30-day P&L on Events Hub. You can come back and change any of these anytime; nothing here is locked in.

Overhead
450
per month ▼

Equipment
2200
per month ▼

Insurance
180
per month ▼

Salaried labor
1200
per month ▼

Save estimates

© 2026 Pivti LLC About Pricing Privacy Terms FAQ Guides Contact support 🌙

Settings → Preferences: target margin and recurring cost estimates

5.1 Target margin

A single account-wide percentage (not set per event). It colors the **Net margin** figure on your home Dashboard's daily event cards: green at or above your target, amber within 10 points below it, red further below that. It does not affect Events Hub's Rolling P&L or any individual event's Scorecard — those are unaffected by this setting.

5.2 Overhead cost estimates

Four optional, recurring categories, each with its own monthly-or-yearly cadence:

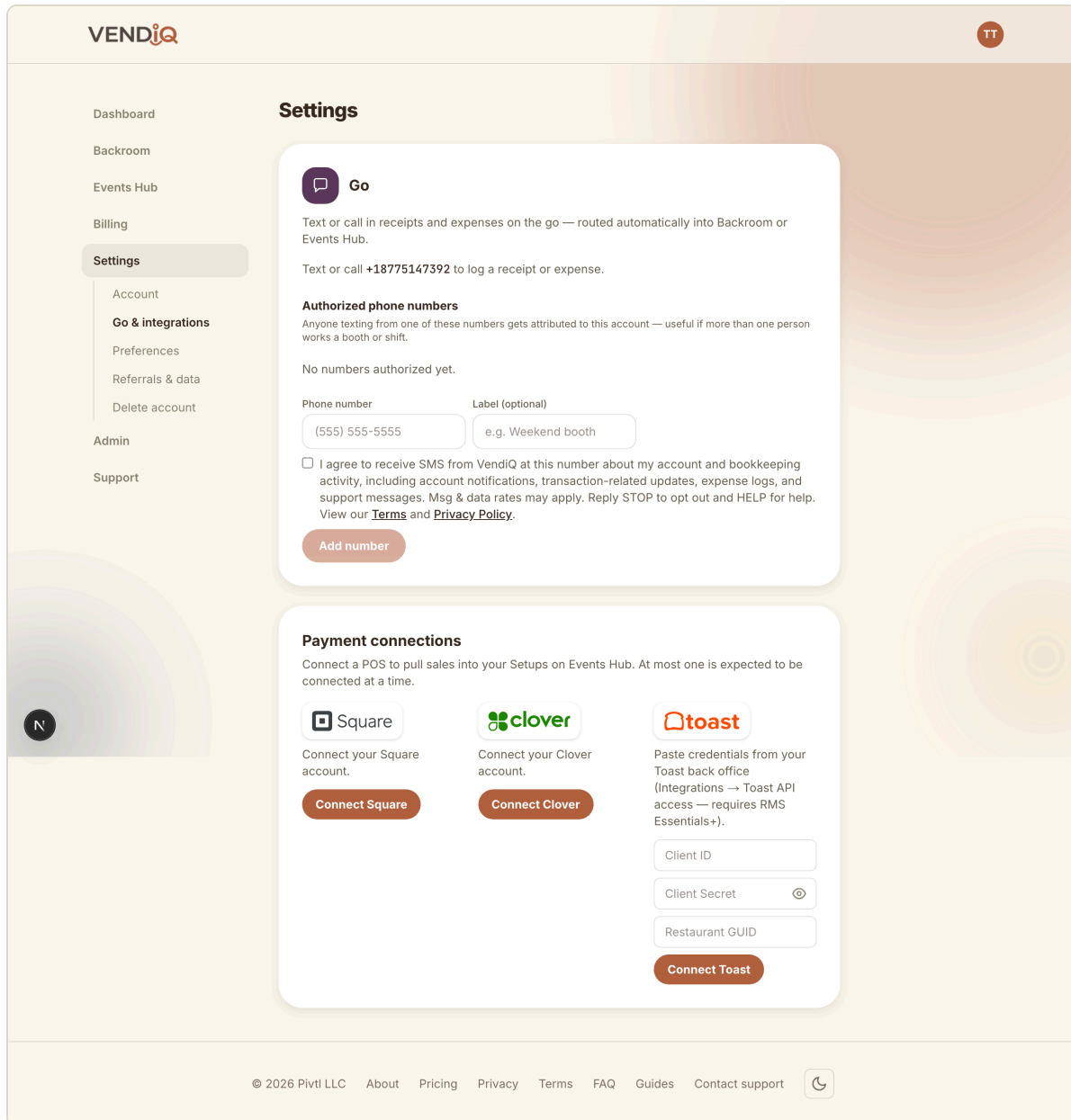
- **Overhead** — rent, utilities, subscriptions, anything that keeps the lights on.
- **Equipment** — a rough estimate is fine, from a handheld tool to a whole vehicle.
- **Insurance** — liability, vehicle, or any other policy tied to the business.
- **Salaried labor** — regular pay to yourself or staff; not casual day-of help, which should be logged as an expense through Go instead.

These feed into the Rolling P&L card on Events Hub (§3.2) only — converted to a monthly figure and scaled to whatever date range you're viewing there. They do **not** affect the home Dashboard or any individual event's Scorecard.

5.3 Tips for accurate overhead numbers

Rough estimates are genuinely fine — nothing here is locked in, and you can update any of these numbers anytime. The one common mistake worth calling out: casual, day-of help (someone you pay cash to help out for a single event) belongs logged as an expense on that event, not folded into "Salaried labor" here — that field is specifically for regular, ongoing pay.

6. Technical Setup: Settings → Go & Integrations



Settings → Go & integrations: authorized phone numbers and POS connections

6.1 Adding or changing phone numbers for Go

From this settings section, add a phone number and a label (e.g. "Sam's phone") so anyone texting from that number gets attributed to your account — useful if more than one person works a booth or shift. You must check a consent box agreeing to receive texts from VendIQ before a number is added; this is a required legal step, not optional. Numbers can be removed the same way they're added.

6.2 Setting up a POS integration

VendIQ is designed around one connected POS at a time; connecting more than one isn't blocked, but only one will ever be used to pull sales in (Square takes priority over Clover, which takes priority over Toast, if more than one somehow ends up connected).

6.2.1 Square

A standard, one-click connection: tap **Connect Square**, log into your real Square account on Square's own sign-in screen, and approve read-only access. VendIQ never sees your Square password. Once connected, you can map a Location to a real Square location, which also unlocks automatic Setup detection (§3.7).

6.2.2 Clover

Works the same way as Square — tap **Connect Clover**, sign in on Clover's own page, approve access. One difference worth knowing: disconnecting inside VendIQ removes VendIQ's access on our end, but Clover doesn't provide a way for us to fully revoke the connection remotely — if you want it completely gone on Clover's side too, remove the VendIQ app from your own Clover dashboard as well.

6.2.3 Toast

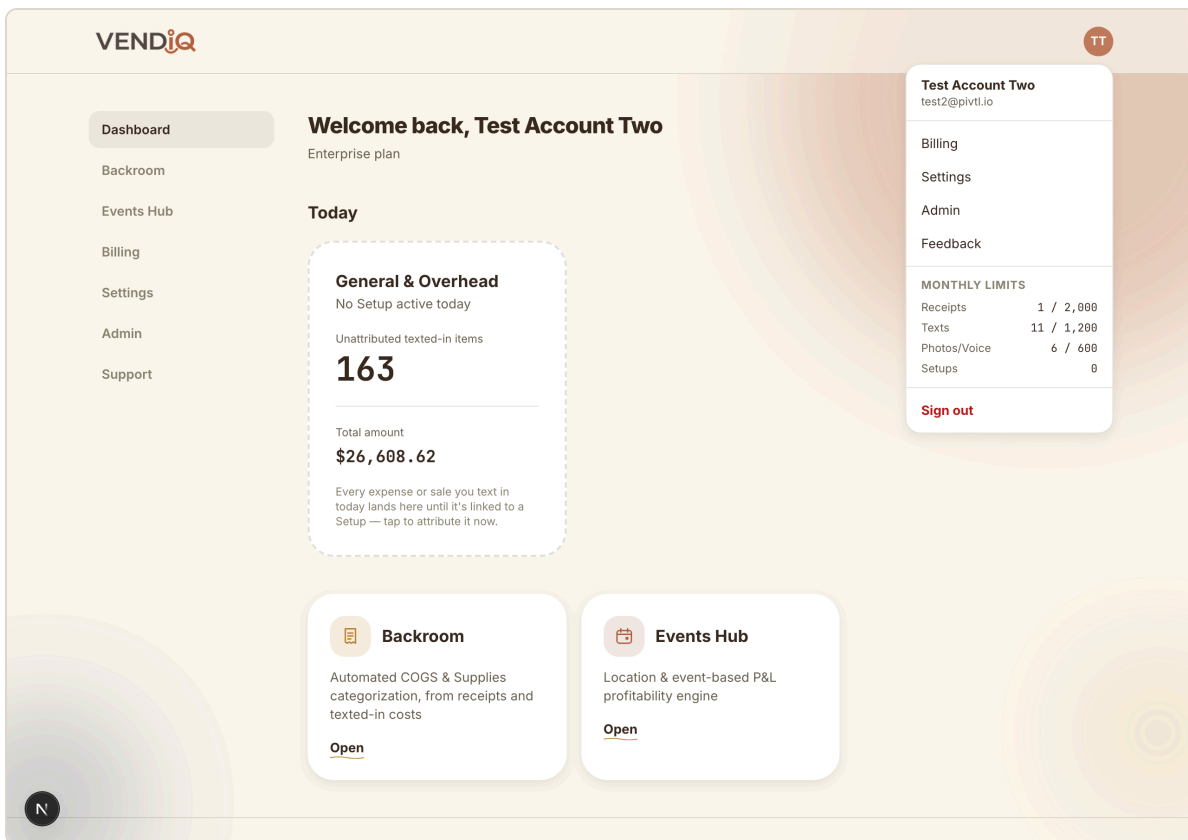
Toast doesn't offer the one-click sign-in flow Square and Clover do. Instead, you'll generate your own API credentials — a Client ID, Client Secret, and Restaurant ID — from your own Toast back office (under Integrations → Toast API access), which requires Toast's RMS Essentials plan or higher. You then paste those three values into VendIQ's Toast connection form yourself.

This is more setup work than Square or Clover, but it's still entirely self-serve — VendIQ never gets access to your Toast account itself, only to the specific credentials you generate and control. If you get stuck generating those credentials on Toast's side, contact Support (§9) and we're happy to walk through it with you.

7. Monthly Subscription Management: Billing

7.1 Tracking your usage through the month

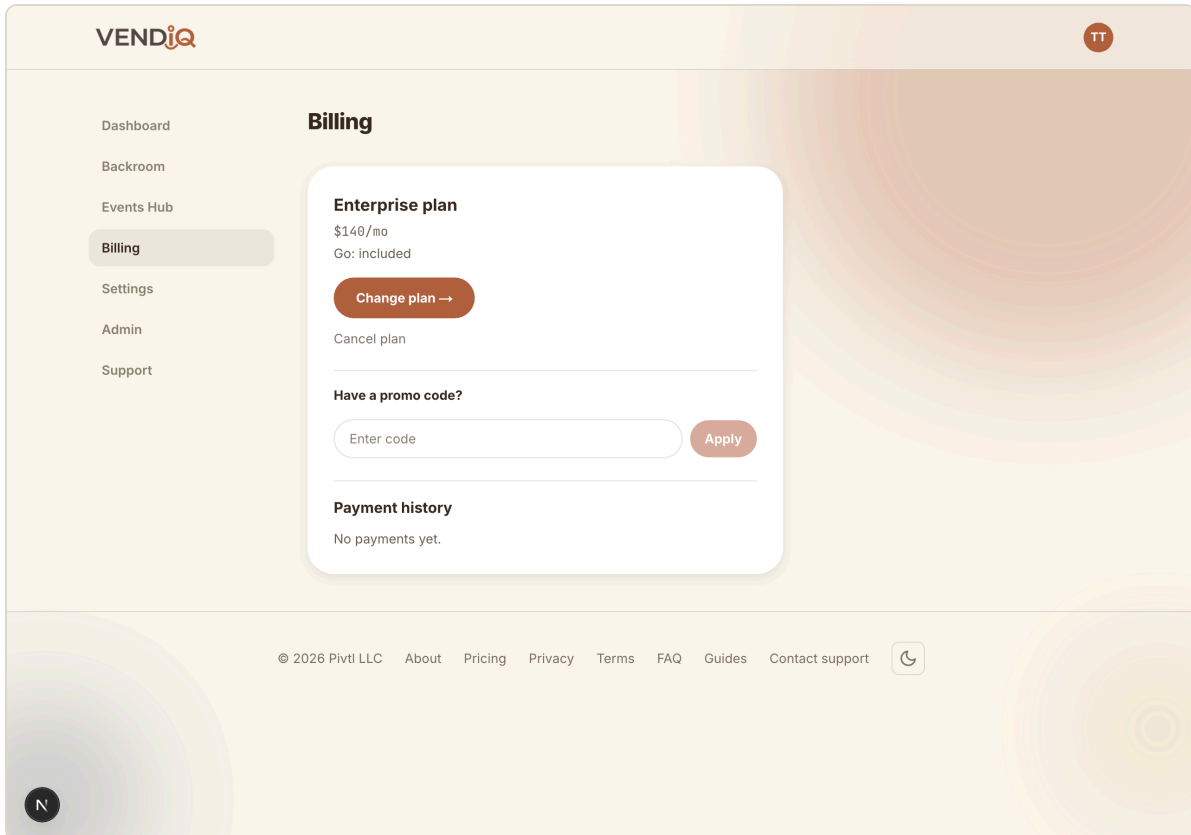
Click your account icon in the top-right corner. Below the Feedback option, a **"Monthly limits"** section shows your usage this month against your plan's caps — Receipts, Texts, Photos/Voice (Go's MMS/voice-memo cap), and Setups — right there in the dropdown, no extra click needed. Numbers turn amber near your cap and red at or over it. (On Enterprise, going over doesn't block you — it bills a small per-unit overage fee instead, shown alongside the count.)



Account menu: Feedback link and Monthly limits usage tracking

7.2 What plans exist

Three tiers — Lite, Plus, and Enterprise — each with its own caps on receipt scans, Go texts, Go photo/voice messages, and Setups, plus whether Go is included free or a paid add-on. See the pricing page for exact current numbers and dollar amounts, since those are the kind of detail that changes independently of this guide.



Billing: plan, payment history, and invoice summary

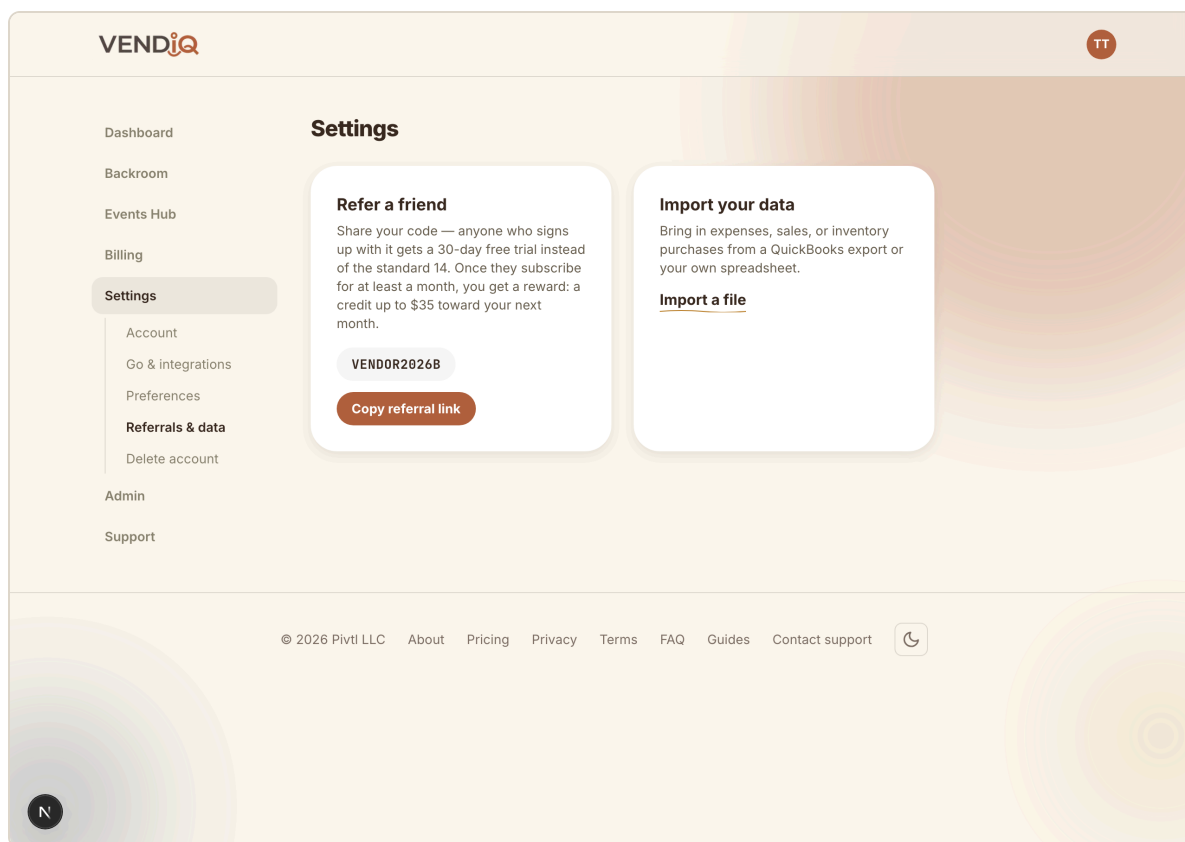
7.3 Changing or canceling your plan

Everything here is self-serve — no phone call or support ticket required.

- **Upgrading** takes effect **immediately**. Before you confirm, you're shown the real prorated amount you'll be charged today (calculated live, not estimated) — occasionally this is \$0 if you're still in a trial.
- **Downgrading** does not take effect right away — your current plan stays active through the end of your current billing cycle, and the downgrade starts at your next renewal. You can cancel a scheduled downgrade anytime before it takes effect.
- **Canceling** works the same way as a downgrade — you keep full access through the end of your current billing period, and your plan simply doesn't renew after that. A "Keep my plan" option stays available the whole time your cancellation is pending, in case you change your mind.

7.4 Entering a promo code

Type it into the "Have a promo code?" field on Billing and tap **Apply** — it takes effect immediately. If it's a removable type, a **Remove** option appears next to it for as long as it's active. (Note: this field is for promo codes specifically — a referral code is entered separately, at signup/checkout, not here.)



Settings → Referrals & data: your referral code and reward tracking

7.5 Referring other vendors

Once your own trial converts to a paid plan, a personal referral code and shareable link appear under **Settings → Referrals & data** (its own card, separate from Billing). Share either one — anyone who signs up using your code gets a **30-day free trial** instead of the standard 14.

You're rewarded automatically once a vendor you referred becomes a paying subscriber — no request or redemption step on your end: a full **free month** added to your next billing cycle if you're on Lite, or a **credit up to \$35** toward your next bill if you're on Plus or Enterprise. The same Settings card also tracks your running totals — how many people have signed up with your code, how many converted to paying, and how much you've earned so far. There's no limit on how many vendors you can refer.

7.6 Understanding your monthly invoice

Your invoice is generated and billed by Stripe, VendIQ's payment processor — Billing shows a summary (plan, amount, date, status) in-app, but the full line-item invoice with tax breakdown lives on Stripe's side.

7.7 Payment history

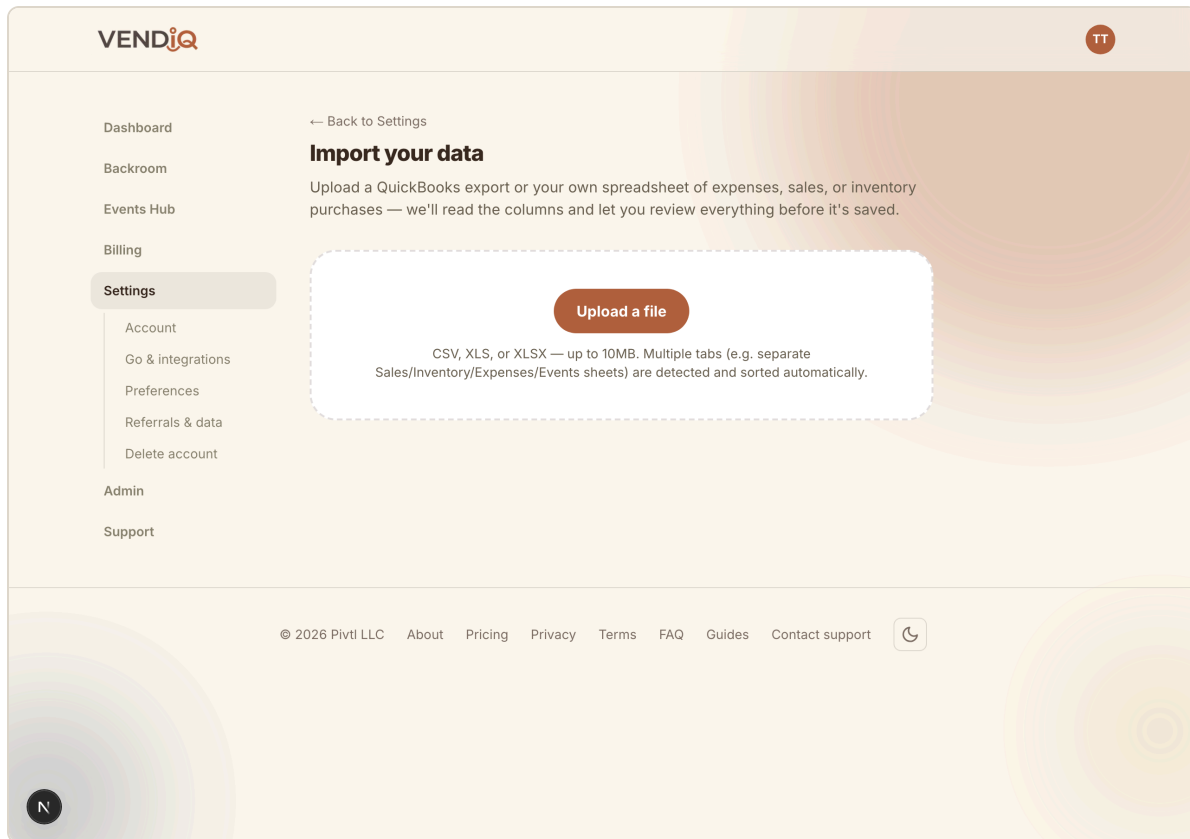
A simple list on the Billing page — date, amount, status, with a link to view each invoice in full detail. For anything beyond what's shown here (older history, full line items), that same link takes you to Stripe.

7.8 Changing your card or other payment details

There's currently no self-serve way to update your card from within VendIQ's Billing page — that control existed at one point but isn't live today. If you need to change your payment method, contact Support (§9) and the team can help directly.

8. Bringing Your Existing Data

If you're switching from QuickBooks, another accounting tool, or your own spreadsheet, you don't have to start from zero. From Settings, find **"Import your data"** and upload a file.



Settings → Import your data: upload and review screen

What's accepted: CSV, XLS, or XLSX, up to 10MB per file. There's no special QuickBooks file type required — a normal QuickBooks CSV/Excel export works the same as your own spreadsheet. (A PDF report export is not supported — only CSV/Excel.)

What it can import: expenses, sales, inventory/COGS purchases, and even past events (Setups) — up to 10 tabs in one workbook, each read independently. VendIQ figures out what each sheet contains by reading its column headers and a sample of its rows — it doesn't matter what you name the tab itself.

Before anything is saved: you'll see every row in an editable table and can fix anything that didn't come through cleanly (a missing amount, a miscategorized item) right there, or delete a row you don't want, before committing. A count tells you how many rows are ready to save as-is. Each sheet saves independently, so you can commit your Sales tab now and come back to Expenses later.

Splitting large imports: genuinely fine, and often the better approach. Each sheet is capped at 5,000 rows, and each file at 10MB — a single import comfortably covers a year or more of typical history, but for anything larger, splitting into a few smaller files works just as well. (Two soft limits worth knowing if you're doing many imports back-to-back: a short rate limit on how many sheets can be processed in a 10-minute window, and each sheet processed counts against your plan's monthly receipt-scan allowance.)

Where imported data ends up: exactly where the same data would land if you'd entered it by hand or texted it in — imported expenses and sales become real entries reviewable from Events Hub, imported inventory purchases land in Backroom's Purchase History, and imported events become real Setups. Imported sales are matched to an existing event by name when possible; anything that isn't matched shows up in the "texted-in, not linked to an event" list (§3.6) for you to attach by hand.

(Referenced from §2.8 — Backroom's own historical-purchase import path is this same feature.)

9. Feedback and Support

These are two different things, reached two different ways — worth keeping straight.

Feedback — click your account icon in the top-right, then **Feedback**. Pick "Something broken," "An idea or request," or "Something else," add a note, and send. This goes straight into our internal tracking for the team to review; it's not a live chat and won't get you a direct reply.

Support — for anything you need a human reply on, use the **Support** link (in the main navigation, or "Contact support" in the site footer), which takes you to a real contact form that reaches our support team directly. There's also an FAQ page linked from the same place, in case your question already has a quick answer there.