

# Merchant Onboarding & Integration Process:

## Introduction

This document outlines the technical specifications and a step-by-step guide for merchants to onboard with DoorDash and integrate their store operations with the POS9 system. The integration enables seamless synchronization of orders, menus, and inventory between the two platforms. This integration streamlines key business processes, ensuring a seamless flow of data between a merchant's point-of-sale system and the DoorDash platform.

By onboarding through POS9, merchants can list their products on DoorDash and manage them through POS9. Any order placed on DoorDash will flow into POS9, and any updates in POS9 (menu, inventory, pricing, store hours) will automatically reflect on DoorDash.

## Benefits of Integration

Integrating with DoorDash through the POS9 platform provides several key benefits for merchants, including:

- **Centralized Order Management:** Orders placed on DoorDash are instantly visible in the POS9.
- **Synchronized Data:** The integration ensures that inventory, item pricing, Order Status and store hours are automatically synchronized between the merchant's POS9 system and the DoorDash platform. This real-time data flow guarantees that customers see the most accurate information, preventing issues with out-of-stock items, incorrect prices, or unavailable store hours.
- **Reduced Manual Work:** No need to maintain menus and stock levels separately.
- **Faster Store Setup on DoorDash:** POS9 acts as a bridge for onboarding merchants quickly.
- **Improved Customer Reach:** Access to DoorDash's marketplace increases sales opportunities.

## Software & Hardware Requirements

### Software Requirements:

- **AdvEnt POS9, POS Web Office authenticated access** (latest version).
- Merchant credentials (DoorDash account credentials/Store ID).
- Stable **internet connection**

## Hardware Requirements:

1. A device with the following minimum specifications is required:

- 8GB RAM & 256GB storage
- 15.6-Inch Multi-touch Capacitive Display
- Bluetooth, Speaker, Wi-Fi
- Windows 10 or above
- An 80mm thermal IP / LAN printer
- A4-size printer

## Merchant Onboarding Flow

The merchant onboarding process is initiated from the POS9 web office. To begin the integration process, follow these steps:

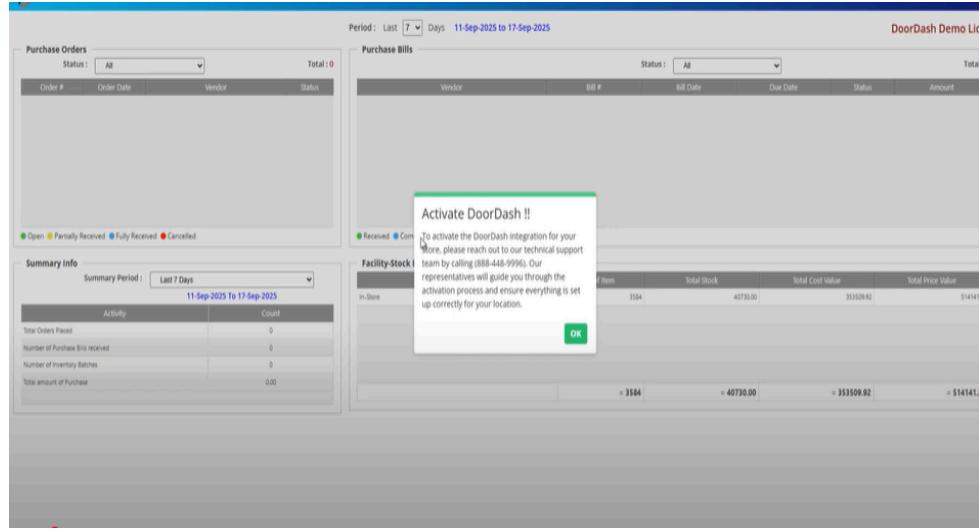
### 1. Merchant Enters Flow:

The merchant logs into the **POS9 Web Office**. Once logged in, click on the **Online Orders > DoorDash** option in the main navigation menu.

The screenshot shows the POS9 Web Office dashboard. At the top, there is a navigation bar with links for Invoice-Order, List, Report, Live Sales, Modules, and Online Orders. The 'Online Orders' link is currently selected. Below the navigation bar, there are two main sections: 'Purchase Orders' and 'Summary Info'. The 'Purchase Orders' section includes a table with columns for Order #, Order Date, Vendor, and Status, and a status filter dropdown set to 'All'. The 'Summary Info' section displays a summary period of 'Last 7 Days' from '25-Oct-2025 To 31-Oct-2025' and a table with activity counts. To the right of these sections, a sidebar titled 'DoorDash' lists integration partners: City Hive, GoToLiquor, and AdvEntPOS. The 'DoorDash' link is highlighted with a red box. At the bottom right, there is a 'Facility-Stock Info' section showing stock levels for In-Store and Warehouse facilities.

### 2. Request Integration:

A prompt appears: “Activate DoorDash!!” if the DoorDash integration is not yet enabled for the store.

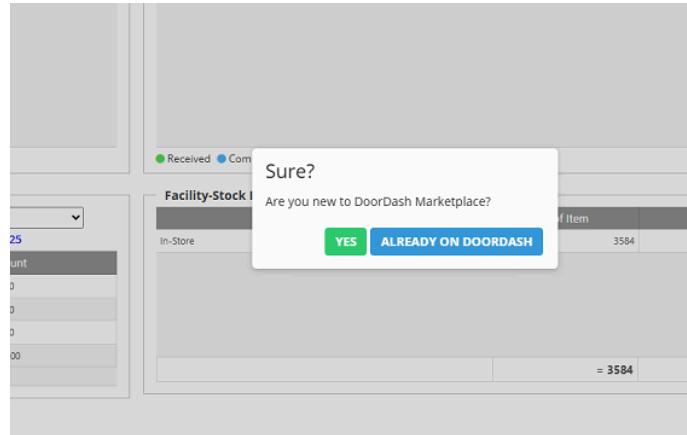


### 3 . POS Web Office Access:

After the "DoorDash" module has been assigned, the merchant must log back into the POS Web office. They will be prompted to select their store, then will be redirected to the POS Web office homepage.

### 4 . Start Onboarding:

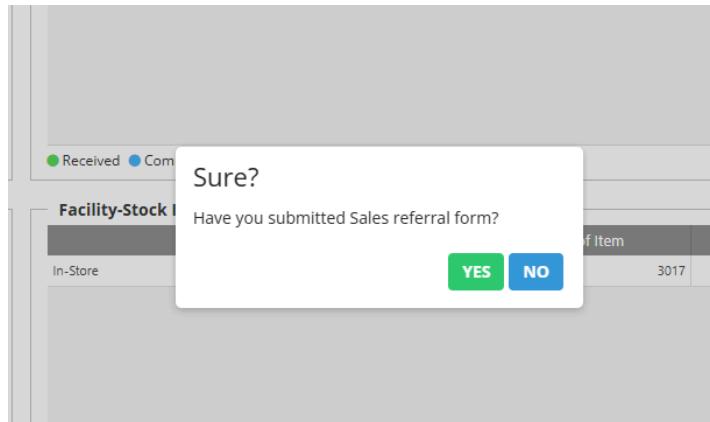
To begin the final onboarding process, click on 'DoorDash.' A new pop-up will appear with the question, 'Are you new to the DoorDash marketplace?' The user must then select either 'Yes' or 'Already on DoorDash' to proceed



### Onboarding for New Merchants (Selecting "Yes")

If the merchant is new to DoorDash, they should select "Yes". This will initiate the following steps:

1. **Confirm Form submission:** The system will prompt, “**Have you submitted a Sales referral form?**”. The user must then select either ‘Yes’ or ‘No’ to proceed. If the user clicks ‘Yes’, the system will consider them as existing merchants and will redirect them for onboarding; otherwise, it will redirect them to the Sales Referral form.



2. **Fill out Referral Form:** An AdvEntPOS referral form (provided by DoorDash) will be displayed. The merchant must fill out all required fields.

The screenshot shows a Google Form titled "AdvEntPOS Referral Form". At the top, there is a message: "Thank you for your interest in partnering with DoorDash! Please complete the form below to begin your onboarding request. This form is intended for merchants who are **new to DoorDash** and would like to request setup for their location(s.)."

Below the message, there is an email input field with the value "ashu@sypramssoftware.com" and a "Switch account" link. There is also a "Not shared" checkbox. A note at the bottom of this section says "\* Indicates required question".

A red box highlights a dropdown menu labeled "Select your state \*". The placeholder text inside the dropdown is "Please select your state to help us determine your store's eligibility for DoorDash.". A note below the dropdown says "This is a required question".

At the bottom of the form, there are three buttons: "Next", "Page 1 of 9", and "Clear form". A footer at the very bottom of the page says "Never submit passwords through Google Forms."

3. **Contract and Store ID:** Upon submission, DoorDash will send a contract to the merchant.
- Once the contract is signed and the account is activated, DoorDash will provide a unique Store ID.

After submitting this request, the system will then finalize the integration setup. The merchant will receive a confirmation, and data synchronization between the POS9 system and the DoorDash platform will begin.

Now, a DoorDash portal is created on the DoorDash platform, and customers can begin placing orders for that merchant.

## Onboarding for Existing Merchants ("Already on DoorDash")

When the merchant is already registered with DoorDash and is looking for an existing DoorDash Store ID, the following step-by-step details need to be filled out.

### Step 1: Basic Set up

#### DoorDash Onboarding

Step 1 : Basic Setup	Step 2 : Store Hours	Step 3 : Store Information	Step 4 : Requestor Information
DoorDash Price: <input type="button" value="Regular"/>			
Increase Price: <input type="text" value="0"/> %			
Order confirmation:	<input checked="" type="radio"/> Check Inventory and Confirm the Order <input type="radio"/> Auto confirm Orders		
Item availability:	<input checked="" type="radio"/> Manually manage availability ( <b>Note:</b> Active POS items will be active on DoorDash; inactive items will be inactive on DoorDash) <input type="radio"/> Determine availability based on stock ( <b>Note:</b> Items will be active on DoorDash only if they have positive in-store stock value) <input type="checkbox"/> Include zero-stock item if sold in last 90 days		
Department:	<input type="text" value="Select Department ..."/>		<input type="checkbox"/> Select All
<b>Note:</b> Existing items from these departments will be added automatically. For future items, enable the 'Web Item' checkbox to include them on DoorDash.			
<input type="button" value="Cancel"/>	<input type="button" value="Continue.."/>		

This page is the first step in the DoorDash Onboarding process. It allows the user to configure the initial setup parameters for integrating a store with DoorDash.

The page includes the following options:

1. **DoorDash Price**
  - A dropdown menu to select the pricing type (e.g., Regular, Price A, Price B, Price C).
  - An additional field “Increase Price (%)” allows the user to apply a percentage-based markup on the Regular price only.
2. **Order Confirmation**
  - **Check Inventory and Confirm the Order:** Requires manual confirmation of each order.
  - **Auto Confirm Orders:** Automatically confirms incoming orders without manual intervention.
3. **Item Availability**
  - **Manually Manage Availability:** The merchant decides which items are available.
  - **Determine Availability Based on Stock:** Item availability is automatically controlled by stock levels.
  - An additional option is available to include zero-stock items if sold in the last 90 days.
4. **Department Selection**
  - A dropdown field to select one or more store departments to be enabled for DoorDash.
  - A “Select All” checkbox is also available for enabling all departments at once.
5. **Action Buttons**
  - Cancel: Exits the onboarding process without saving changes.
  - Continue: Proceeds to the next step (Step 2: Store Hours).

## Step 2: Store Hours

## DoorDash Onboarding

Step 1 : Basic Setup Step 2 : Store Hours Step 3 : Store Information Step 4 : Requestor Information

Monday:	00:00 AM	To	11:59 PM
Tuesday:	00:00 AM	To	11:59 PM
Wednesday:	00:00 AM	To	11:59 PM
Thursday:	00:00 AM	To	11:59 PM
Friday:	00:00 AM	To	11:59 PM
Saturday:	00:00 AM	To	11:59 PM
Sunday:	00:00 AM	To	11:59 PM

[Cancel](#) [Continue..](#)

This page is the second step in the DoorDash Onboarding process. It is used to define the operating hours of the store for each day of the week. The configured hours determine when the store will be available to accept DoorDash orders.

The page includes the following elements:

### 1. Day-wise Operating Hours

- Each day of the week (Sunday to Saturday) is listed.
- For each day, two fields are provided:
  - Opening Time (default: 00:00 AM).
  - Closing Time (default: 11:59 PM).
- Times can be selected using dropdown menus in 12-hour format (AM/PM).

### 2. Action Buttons

- Cancel: Exits the onboarding process without saving the entered store hours.
- Continue: Saves the store hours and proceeds to the next step (Step 3: Store Information).

## Step 3: Store Information

## DoorDash Onboarding

Step 1 : Basic Setup   Step 2 : Store Hours   Step 3 : Store Information   Step 4 : Requestor Information

* Store ID	1716	* Business ID	NJ_DoorDashDemoLiquor-LIQ_08873
DoorDash Store ID			
* Partner Store Name	DoorDash Demo Liquor		
* Address 1	5 Clyde Road	Address 2	
* City	Somerset	* State	NJ
* ZIP	08873		

[Cancel](#) [Previous](#) [Continue..](#)

**Enter Store ID:** The merchant must enter their existing DoorDash Store ID in the designated field.

### Store Information:

- **Partner Store Name:** Name of the store as it should appear on DoorDash.
- **Address 1:** Primary address of the store.
- **Address 2:** Secondary address (optional).
- **City:** The city where the store is located.
- **State:** The state abbreviation (e.g., NJ).
- **ZIP:** Postal code of the store's location.

### Action Buttons:

- **Cancel:** Exits the onboarding process without saving entered information.
- **Previous:** Returns to Step 2 (Store Hours) for editing.
- **Continue:** Proceeds to Step 4 (Requestor Information).

## Step 4: Requestor Information

## DoorDash Onboarding

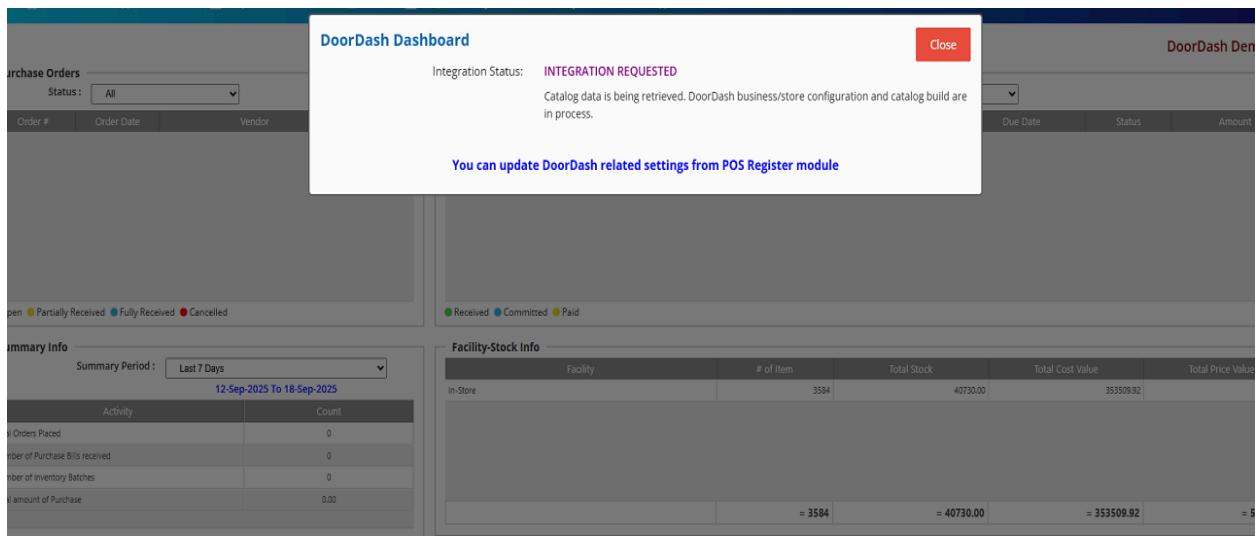
Step 1 : Basic Setup    Step 2 : Store Hours    Step 3 : Store Information    Step 4 : Requestor Information

*	First Name	*	Last Name
*	Email		
	Phone		
	Expected Go-Live Date	mm/dd/yyyy	<input type="button" value=""/>
	* Owner Email		
<small>*This user must be a Business Admin user in DoorDash Merchant Portal to authenticate the request</small>			
<input type="button" value="Cancel"/>		<input type="button" value="Previous"/>	<input type="button" value="Submit Request"/>

### 1. Requestor Information:

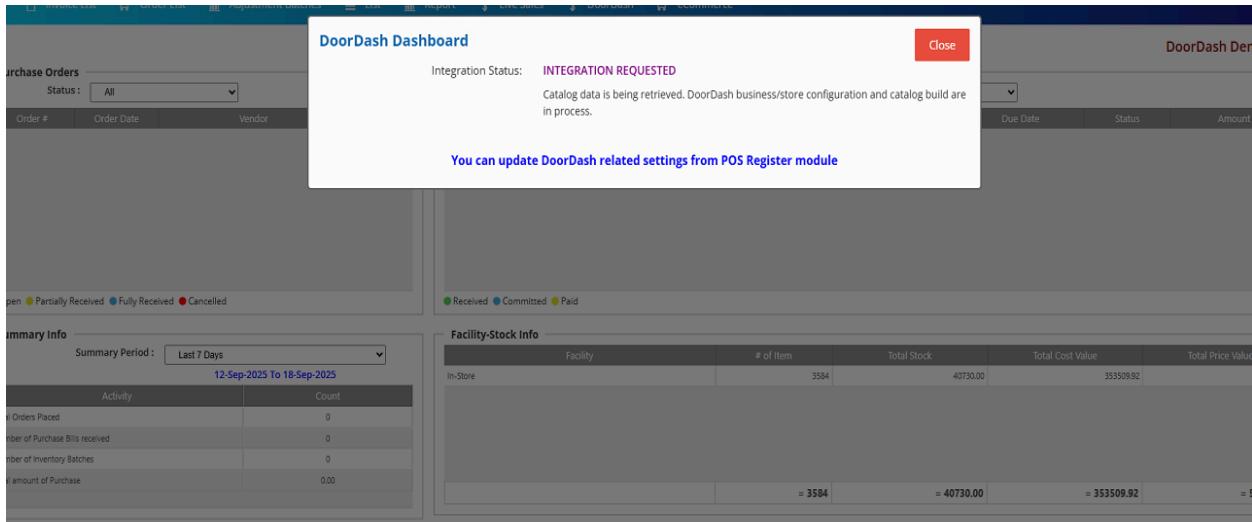
- **First Name:** First name of the requester who is initiating the onboarding request.
- **Last Name:** Last name of the requester.
- **Email:** Contact email of the requester. This must be valid and should preferably be the DoorDash Business Admin user email.
- **Phone:** Contact number of the requester for communication and verification purposes.
- **Owner Email:** The business email address.

**Integration Requested:** After submitting the request, a pop-up will appear displaying the status ‘Integration Requested’

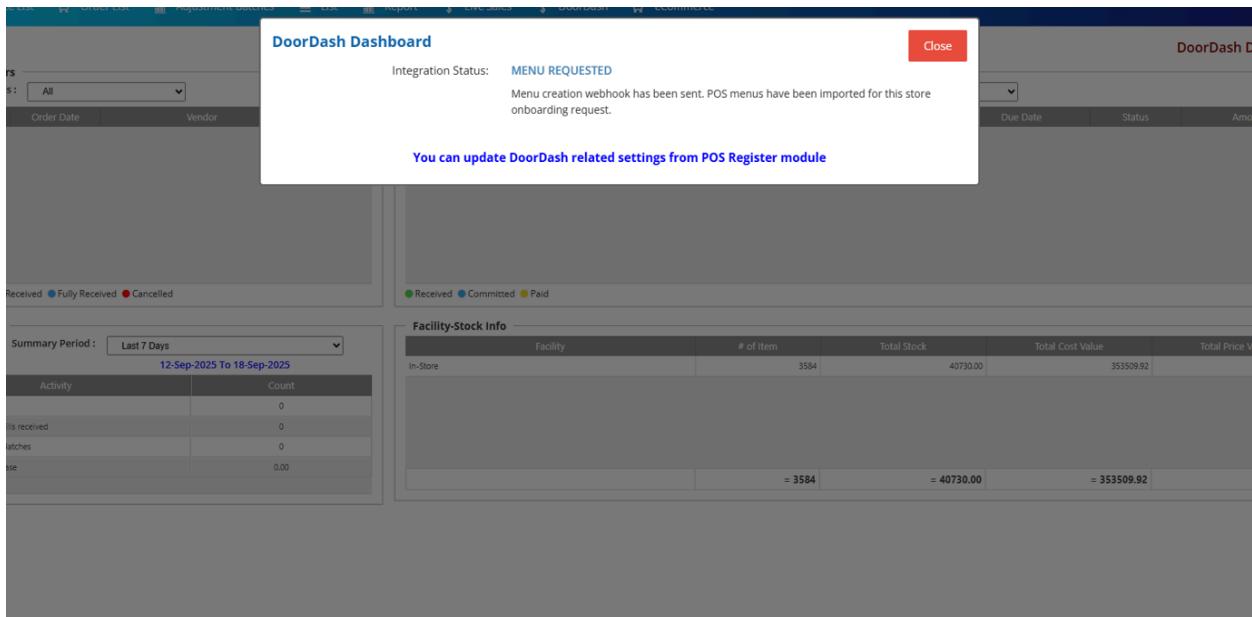


## Integrated Status on POS9 Weboffice:

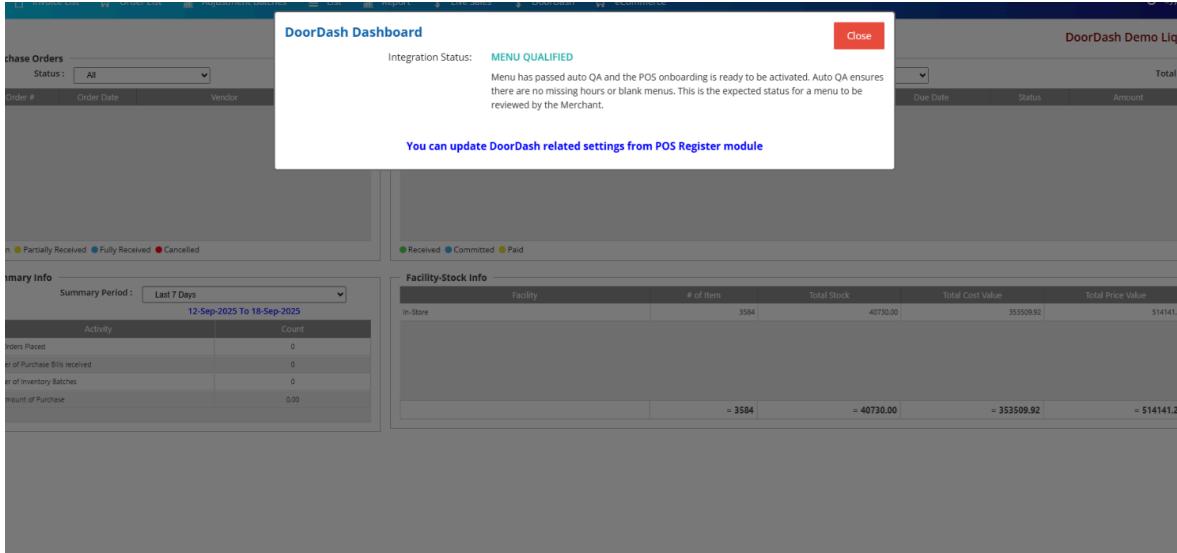
- Integration Requested:** When the user clicks on “DoorDash,” a pop-up appears displaying the status “Integration Requested”.



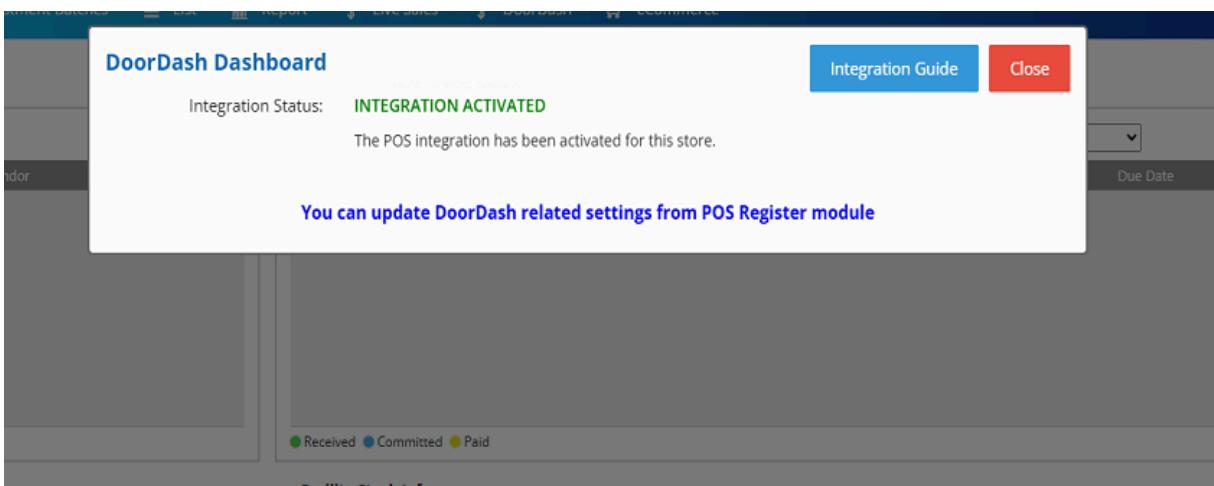
- Menu Requested:** When the user clicks on “DoorDash,” a pop-up appears displaying the status “Menu Requested”.



- Menu Qualified:** The "Menu Qualified" status indicates that the menu has successfully passed an automated Quality Assurance (QA) check. This means that the menu data imported from the POS system has been validated and is ready to be activated.

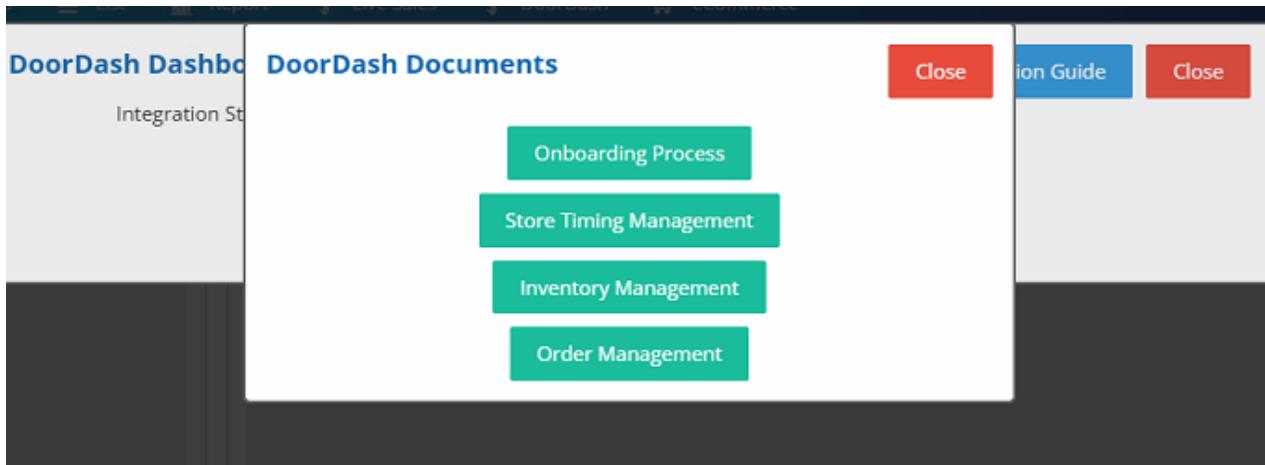


4. **Integration Activated:** The "Integration Activated" status confirms that the POS integration has been fully activated for the store.



### Integration Guide:

- When the user clicks the **Integration Guide** button, a pop-up window labeled DoorDash Documents will open.
- The pop-up will display a list of available DoorDash-related documents (e.g., Onboarding Process, Store Timing Management, Inventory Management, Order Management).
- Clicking on any document from the list will open the selected document in a new tab for viewing.



## POS9 Register Module:

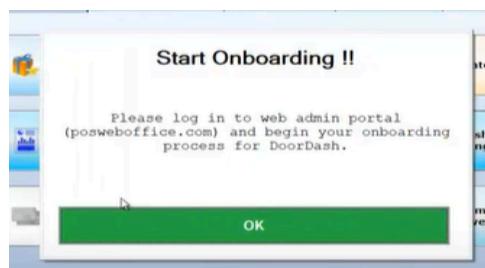
### **Merchant is not integrated with DoorDash:**

If the merchant is not integrated with DoorDash and attempts to access DoorDash from **Register Module > Misc > Online Orders (Tab) > DoorDash**, a pop-up message will be displayed.



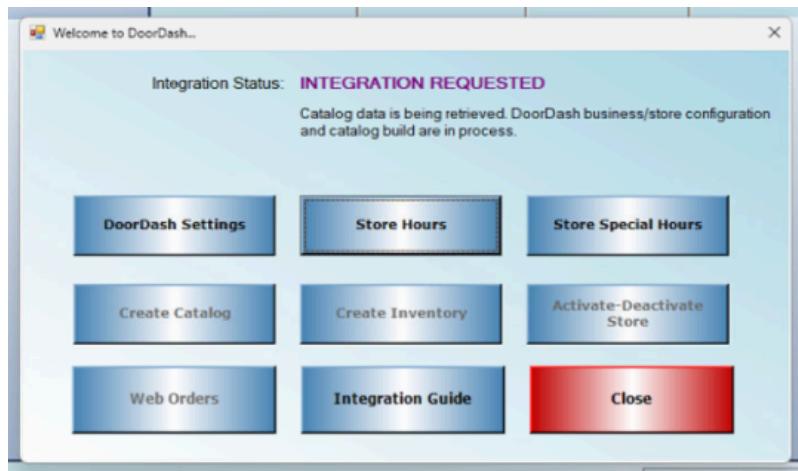
### **Merchant is integrated with DoorDash:**

If the DoorDash module has been assigned by the support team but the onboarding process is not yet completed by the Merchant, a pop-up message will be displayed in the Register Module when attempting to access **DoorDash**.

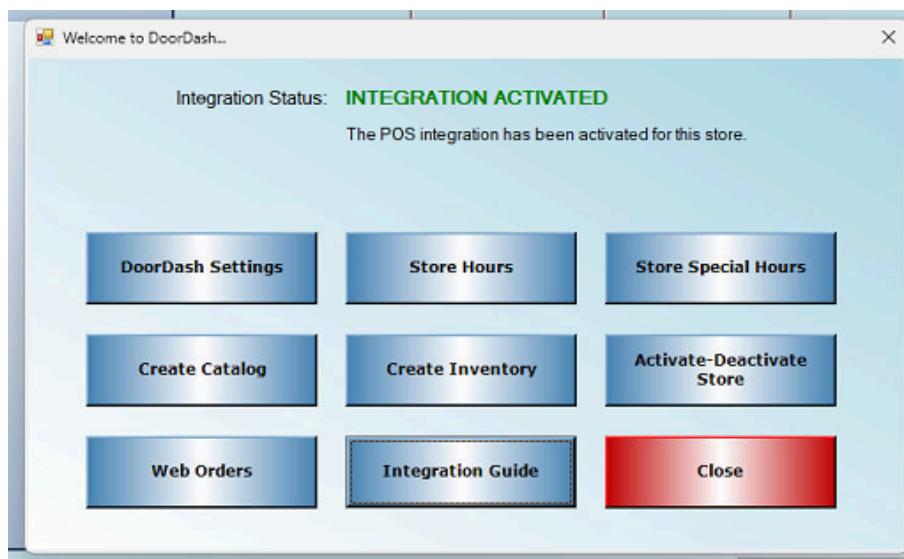


After completing the onboarding process, the merchant can attempt to access DoorDash. While the integration status is displayed as 'Integration Requested', only the following four options will be enabled.

- 1) DoorDash Settings
- 2) Store Hours
- 3) Store Special Hours
- 4) Integration Guide

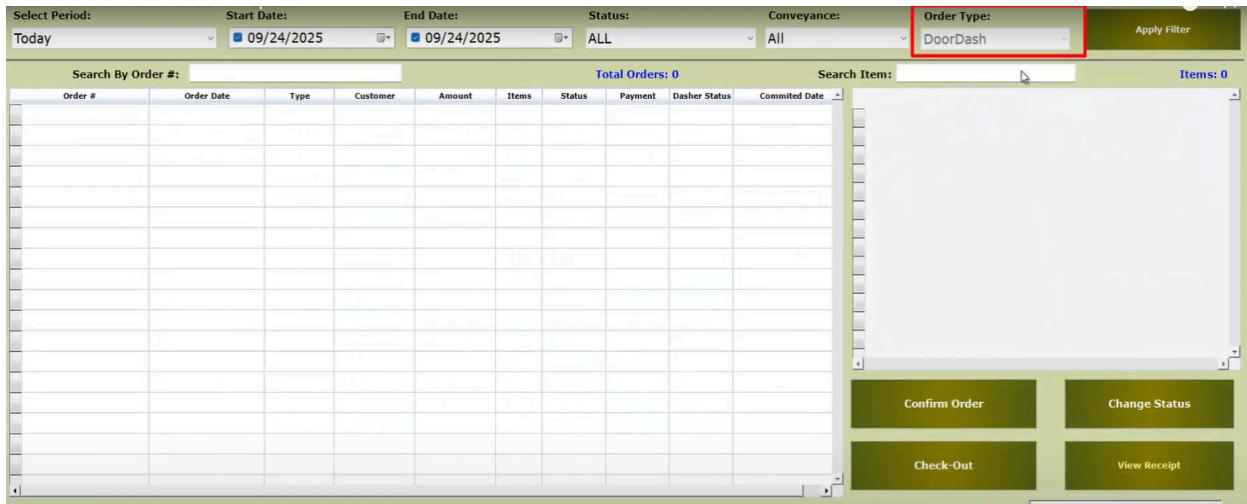


Once the status changes to 'Integration Activated,' the other options will be enabled.



### Web orders (DoorDash):

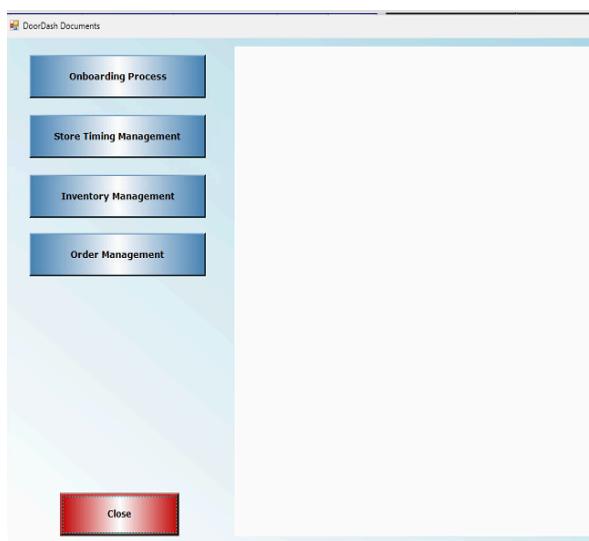
The **Web Orders** section is designed to display **only DoorDash orders**. This Button will be activated once the order status is changed to "**Integration Activated**". When users access this section, the **Order Type** is automatically set to **DoorDash** by default.



## Integration Guide:

The **Integration Guide** provides users with access to DoorDash-specific documentation.

- When accessed, the **DoorDash Documents** window opens.
- The left panel displays document categories as buttons.
- The right panel is blank until a document is selected.
- **Document Categories:**
  - Onboarding Process
  - Store Timing Management
  - Inventory Management
  - Order Management
- When a user clicks on any document button, the related DoorDash document is displayed in the right panel.



# Integration Capabilities

Once the integration is successfully established, the following functionalities will be enabled:

- **Order Synchronization:** Orders placed by customers on the DoorDash, the Dash platform will be automatically sent to and reflected in the POS system.
- **Status Updates:** Order status updates from DoorDash will be reflected in the POS9 system, providing a single source of truth for all order fulfillment.
- **Inventory Management:** Any changes made to inventory (stock levels, new items, deletions) within the POS9 will be pushed to the DoorDash platform, ensuring a consistent product offering.
- **Price Setup:** Any price changes or updates made in POS9 will automatically be synchronized with the merchant's DoorDash store. This ensures consistency between the in-store POS system and the DoorDash marketplace without requiring manual updates on both platforms.
- **Store Active/Inactive and Hour management:** Merchants can manage their store's availability and operating hours directly from POS9.
  - If the store is marked as **Inactive** in POS9, it will also be set as **Inactive** on DoorDash.
  - If the store is marked as **Active**, it will be visible and open for customers on DoorDash.
  - Any updates to **store hours/special hours** (opening and closing times, holiday schedules, etc.) made in POS9 will automatically reflect in DoorDash.