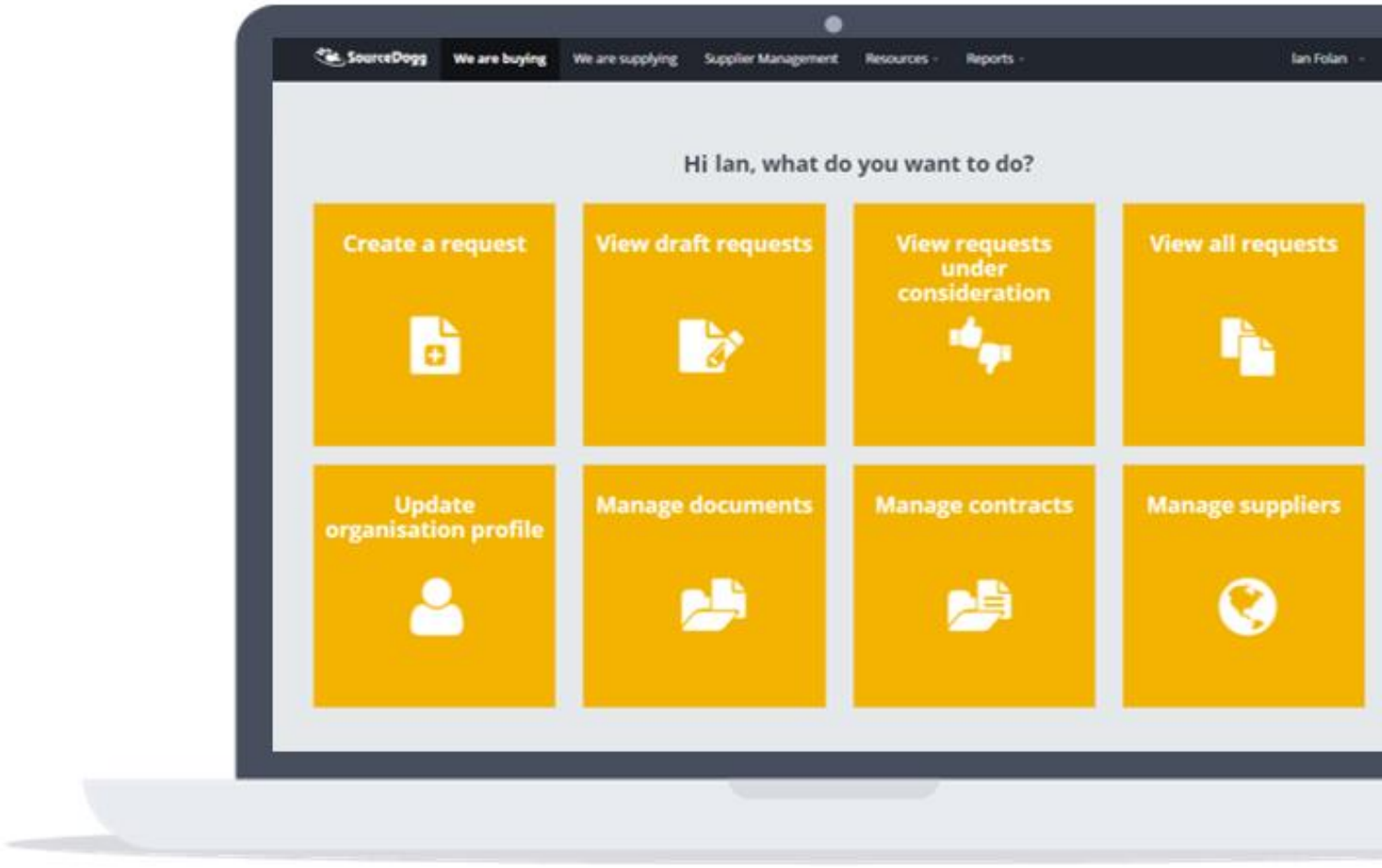
Multistage Request Process

Date: 10th May 2017



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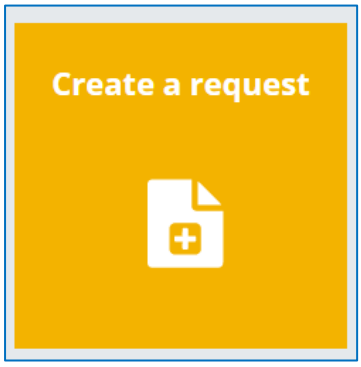
1. Introduction

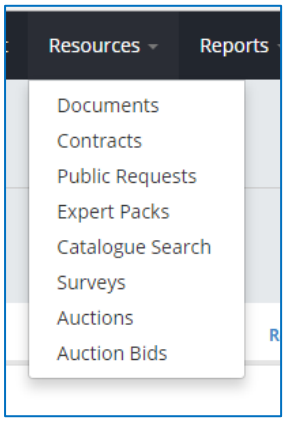
Multistage requests are a new feature of SourceDogg that allows users to create several stages in an RFx event. This feature is useful if the projects last for long periods of time and if there are several different stages of the projects going through. It allows the buyer to add more technical, commercial or quality based questions in the latter stages or to ask suppliers to respond to repeat questions again in case there were any changes in the project specifications. It can also be used if the buyer wishes to go from RFI, to RFP, to RFQ etc and change the format of the questionnaire along the way while maintaining a link between stages.

2. Create a Request

A SourceDogg request can either be created fresh or by using a previously created template. To create a new request, click on the 'Create a Request' tile on the homepage.



To create a request form a template click on 'Expert Packs' and select a template from one of the folders.



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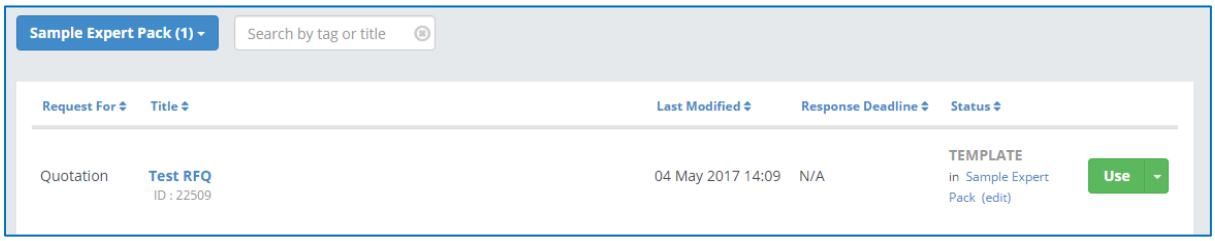
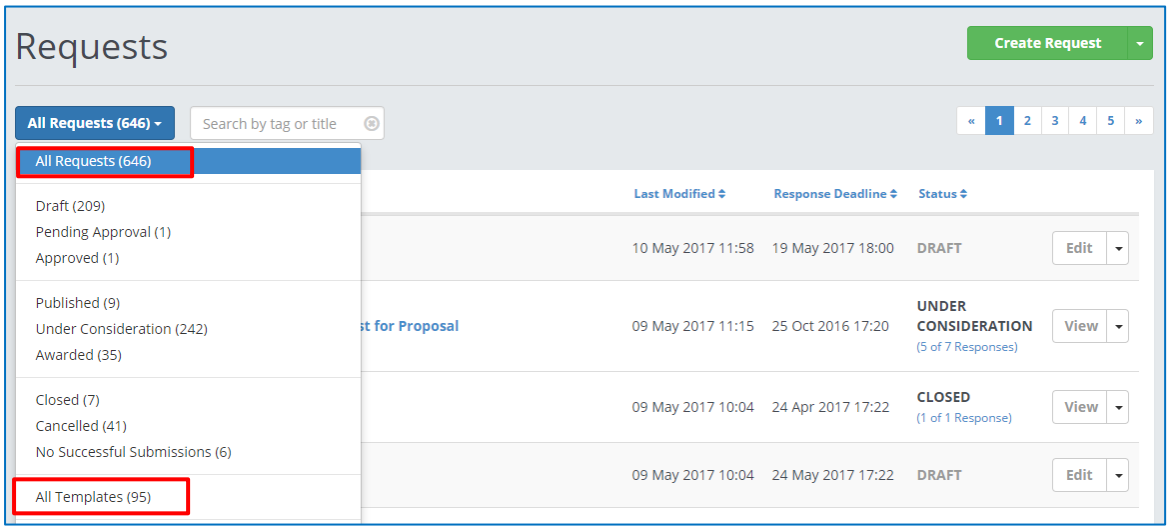


Alternatively, request templates can be found by going to the 'Requests' menu and selecting 'All Templates' from the blue dropdown list on the left-hand side of the page.



When the draft is created, fill in the necessary details and attach any relevant documents.

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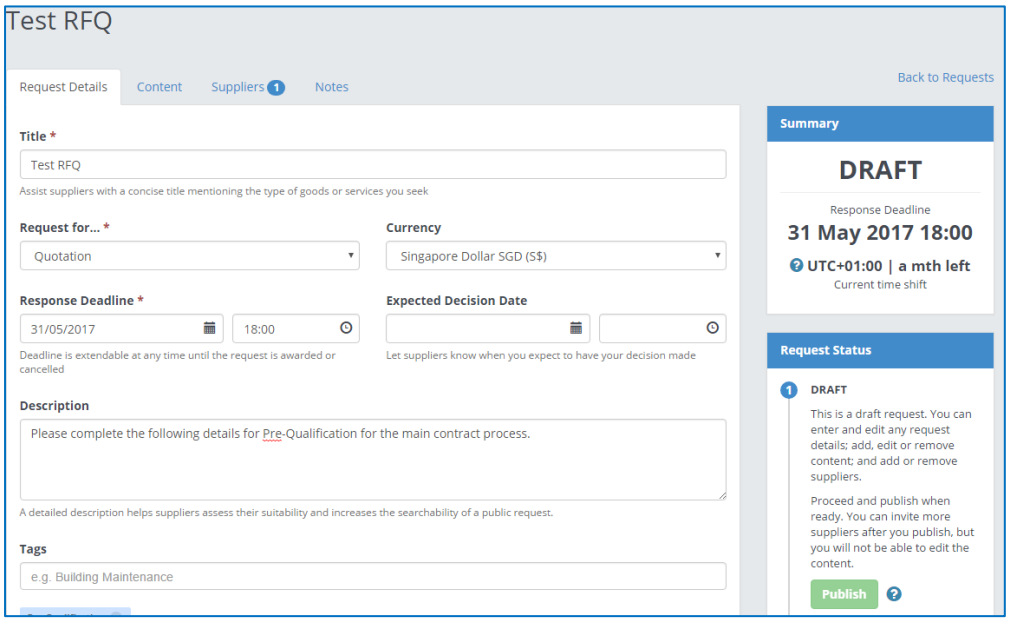
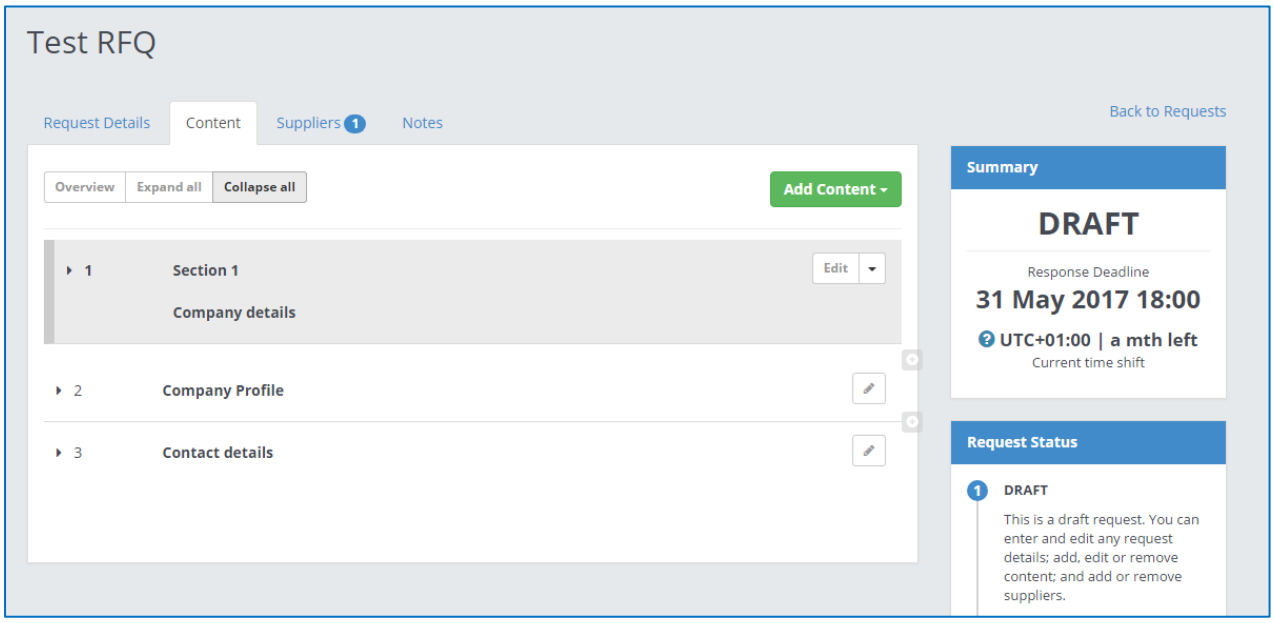


Create or edit the content of the request.



Publish the RFQ and send out to suppliers

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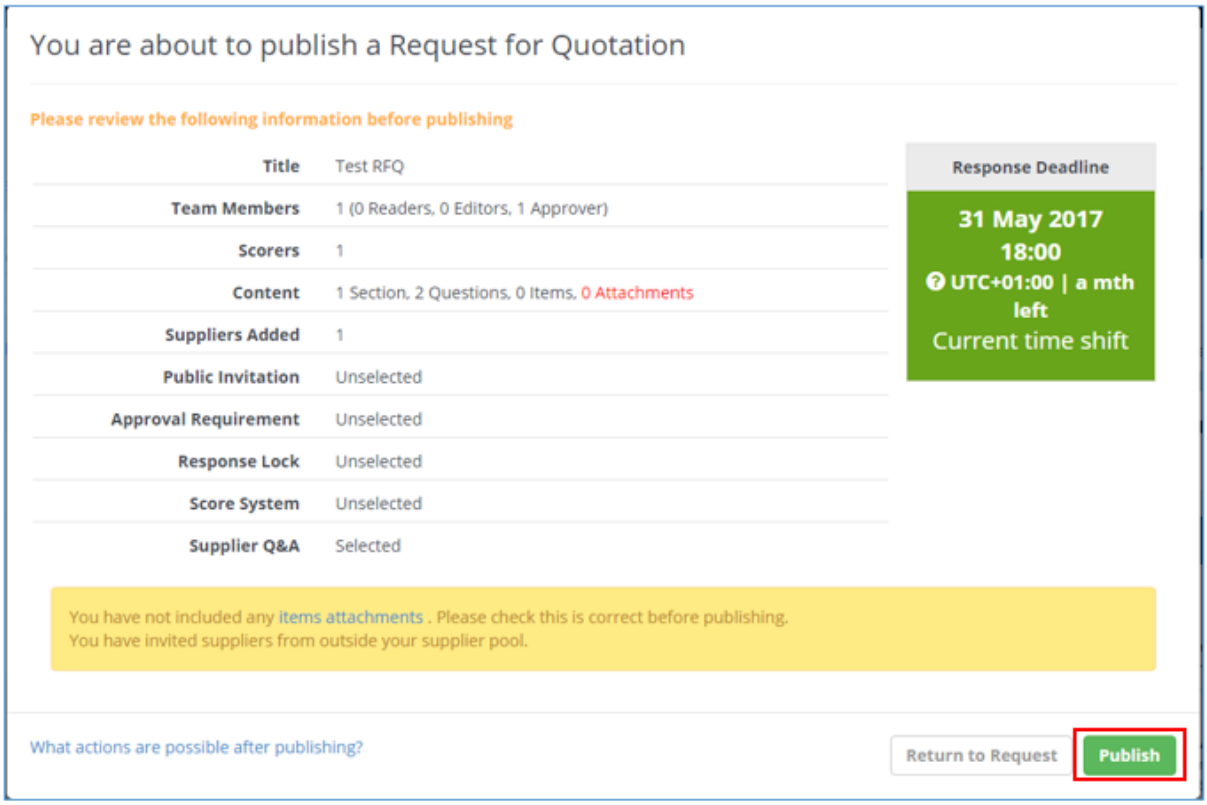
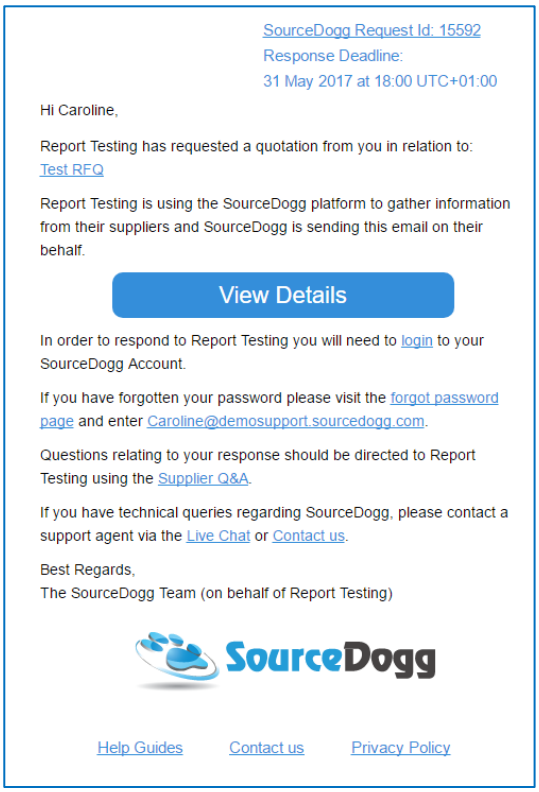


This is an example of the email notification sent to the supplier that has been invited to participate in the RFQ.



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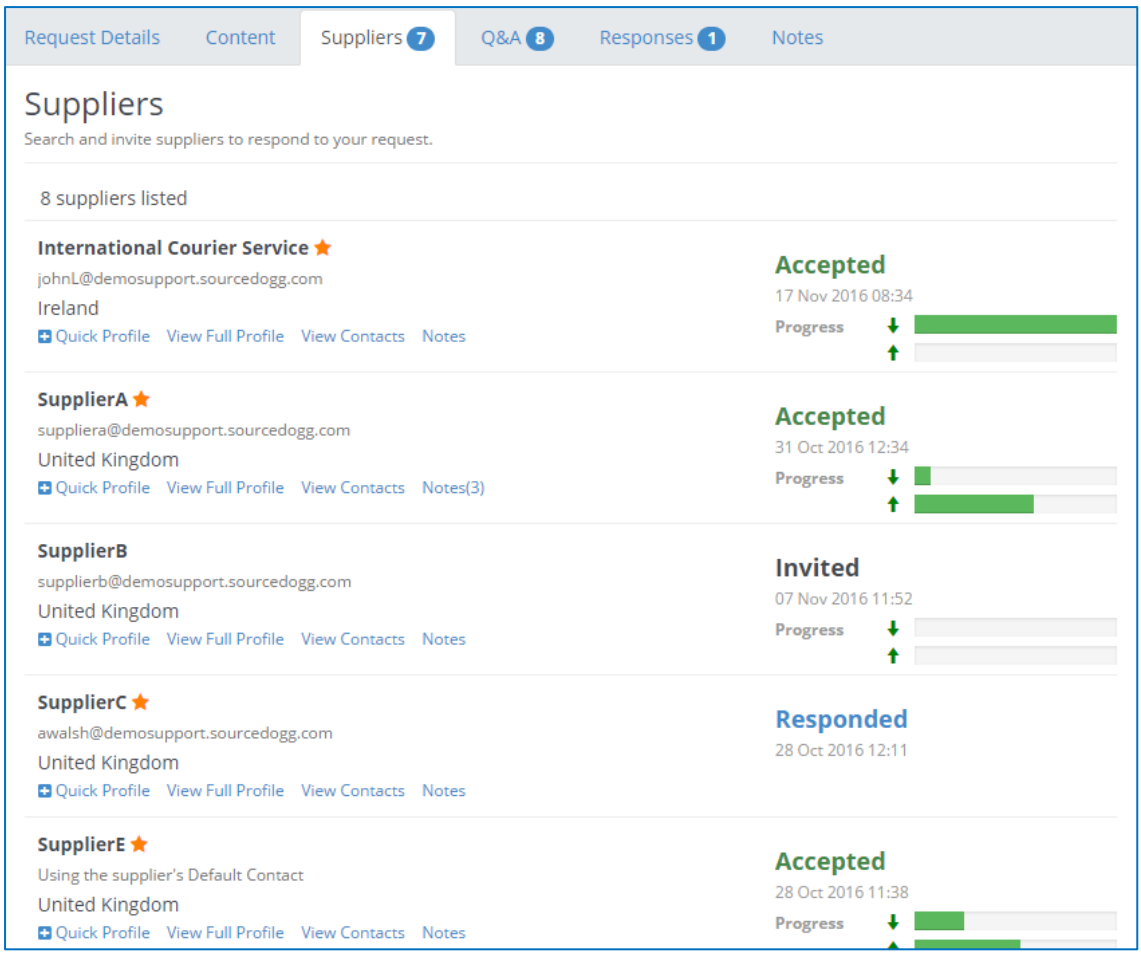
3. Monitoring Supplier Progress

After you have published the RFQ you can monitor the suppliers' progress as they complete their response by viewing the 'Suppliers' tab in the request.



When responses are submitted, a new tab appears. After the deadline has passed the user can review the response from a supplier and start the scoring process, if scoring is turned on.

If you applied the response lock in the request settings page it will mean that the responses cannot be viewed or reported on until the deadline has passed.

Once the deadline is reached the request is now 'Under Consideration'. If there is a need to get suppliers to alter their responses or get more responses, the deadline can be extended. This will send a system email to the suppliers to notify them.

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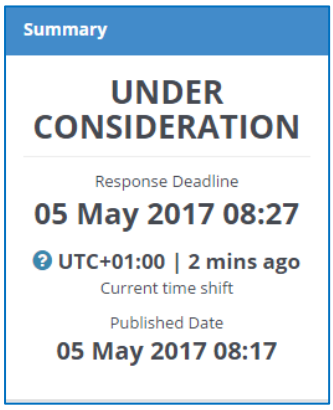
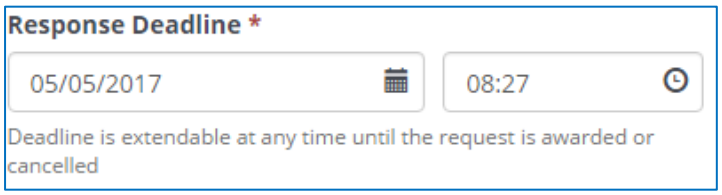
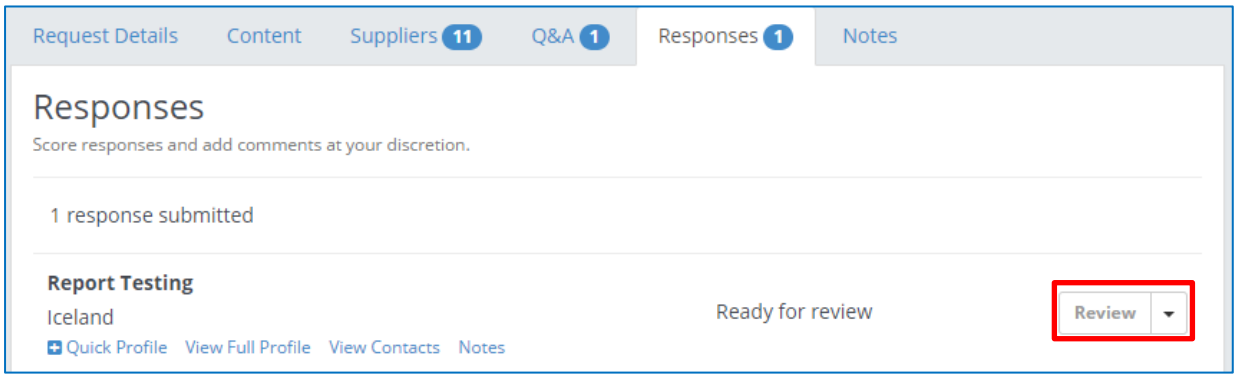




4. Reviewing and Scoring

When you are reviewing the responses, you can choose to export and download them individually as a PDF or Word document.



You can also analyse the responses using the 'Total Price' or 'Items and Prices' reports.

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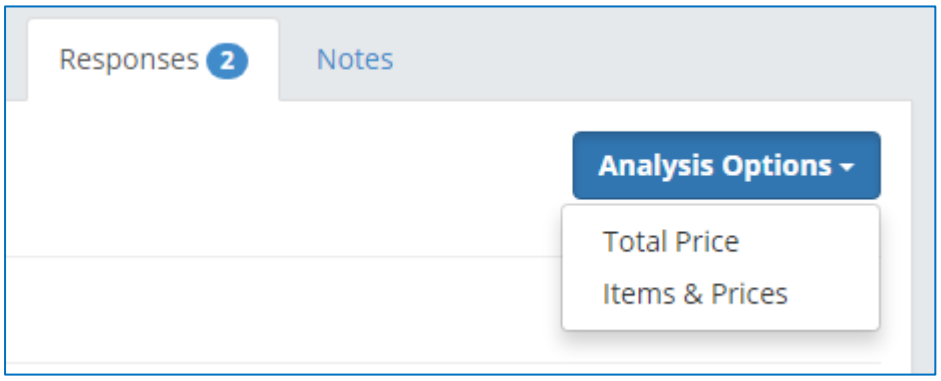
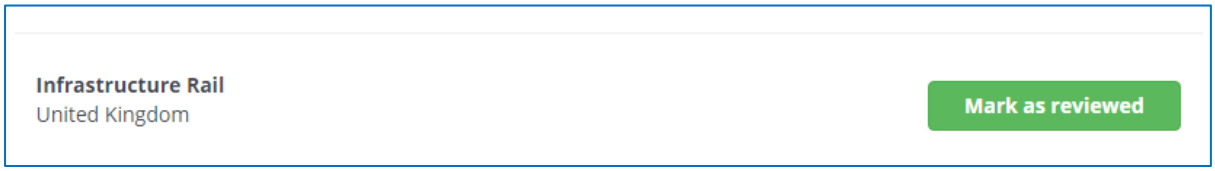
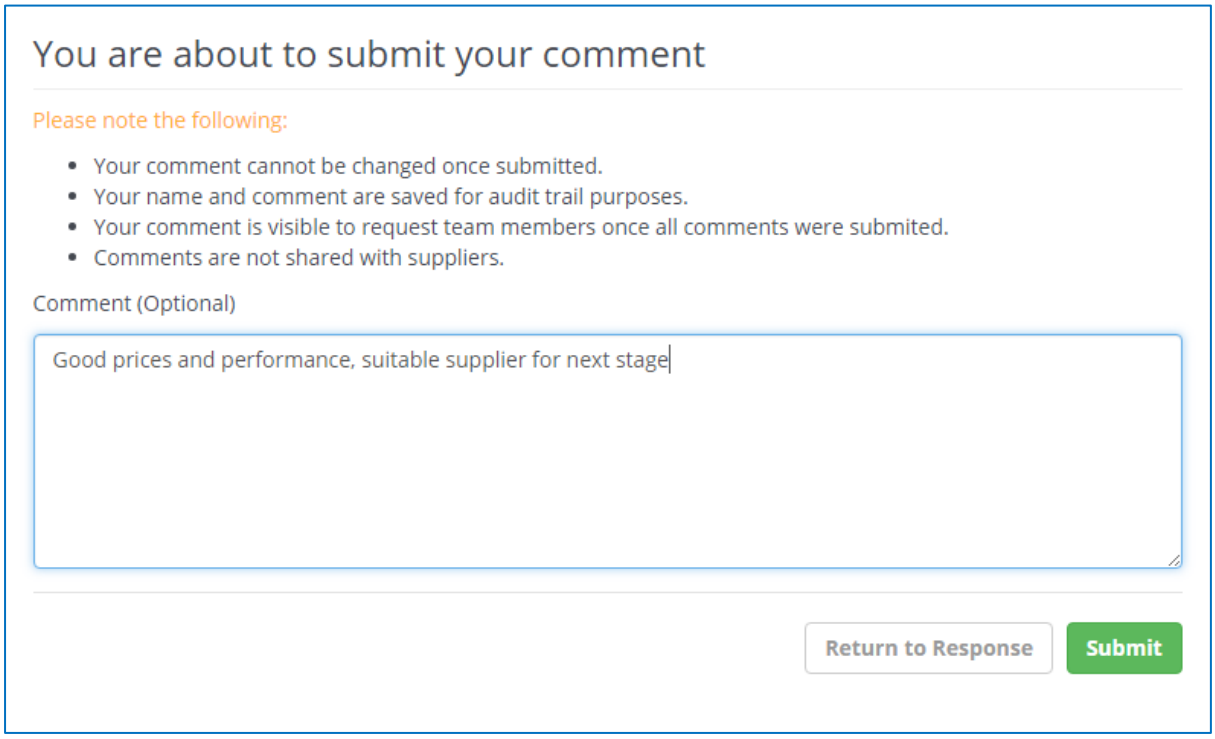


When you have finished reviewing a response, click on 'Mark as reviewed'.



You can then attach a comment for audit purposes which will can be read by other team members, but not by suppliers.



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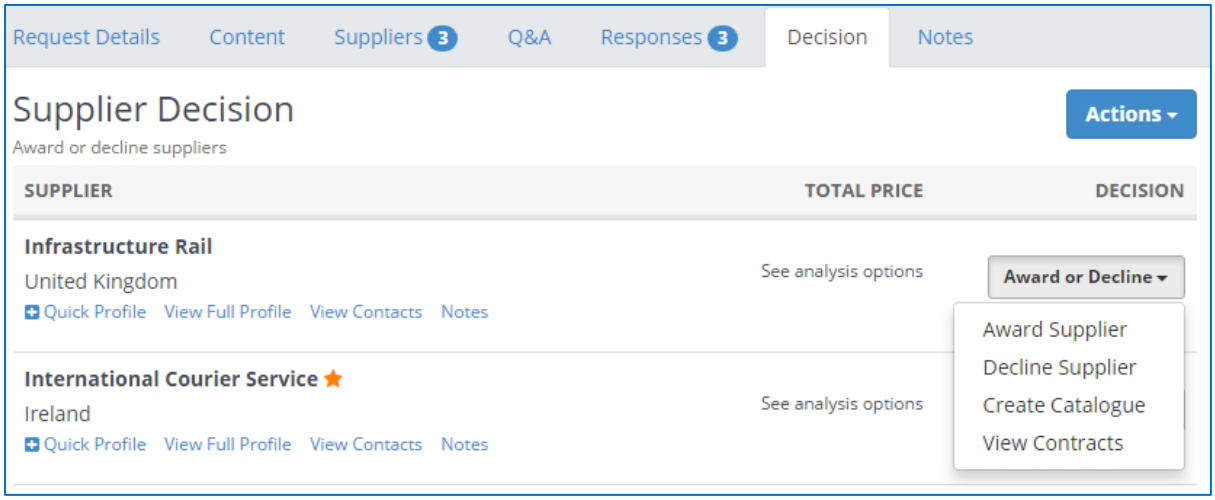
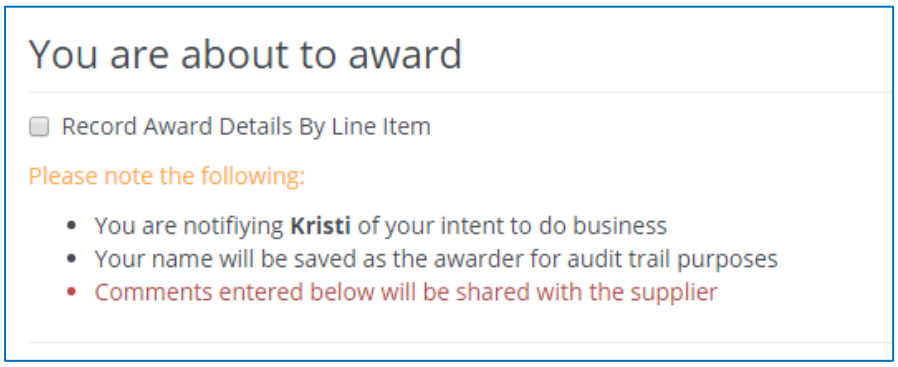
5. Awarding/Declining

At this point the 'Decision' tab is now available. Here you can 'Award' or 'Decline' a supplier. Please note that awarding at this stage will prevent you from creating subsequent request stages.



You can award a supplier for individual products or services using the 'line item award' functionality.

When you are about to award you tick the box to allow line item award.



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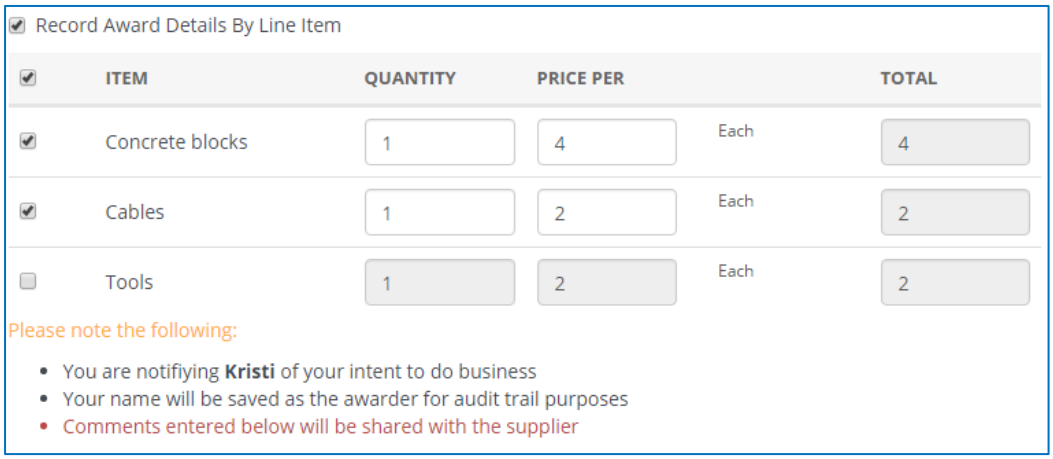
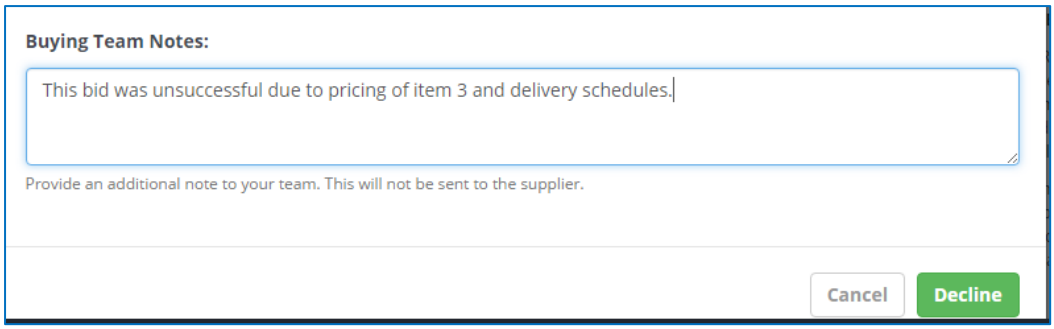
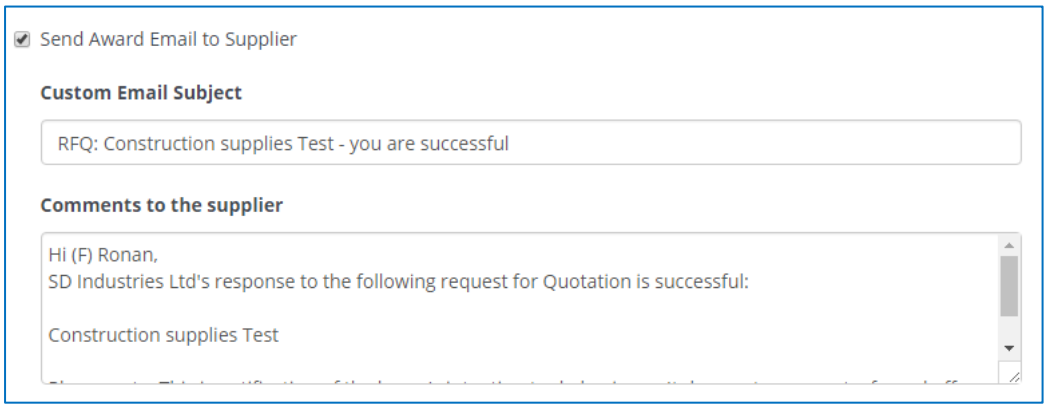
You can then select which of the lines you are to award to this supplier.



You can add notes to the 'You are about to award/decline' page. These will not be added to the email that the supplier receives and are only available to be viewed by other members of your buying team.



The award/decline email is optional and if chosen will be sent to the awarded/declined supplier. It is also customisable.



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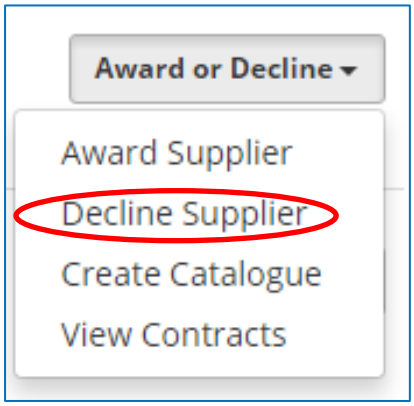
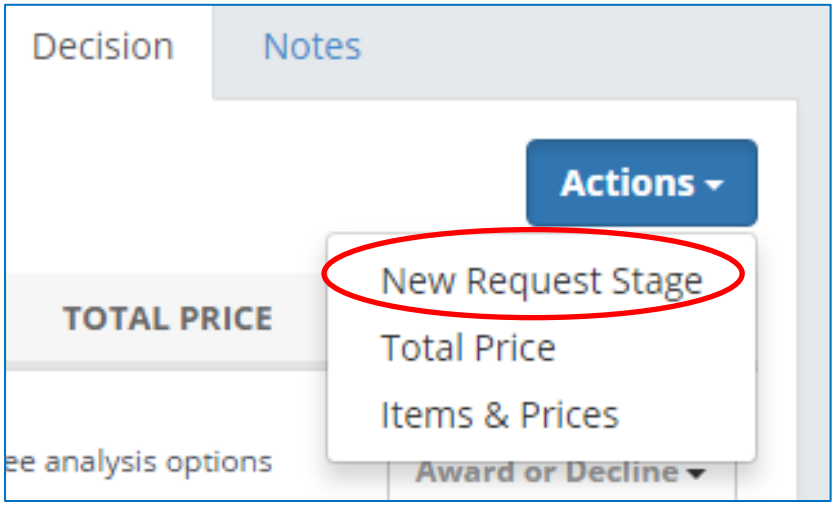
6. Creating Additional Request Stages

If you require updated pricing or further information, additional request stages can be created. Firstly, in the 'Decision' tab, decline suppliers who do not meet your RFQ requirements.



You can then begin the second stage of the process by clicking on the 'Actions' button and selecting 'New Request Stage'. The option for a second stage will be removed if any supplier is awarded in the first stage.



This will transfer all question content, supplier responses and additional information such as notes or any Q&A content, from the previous request to the new one. However, you can still edit any existing content as well as adding new content.

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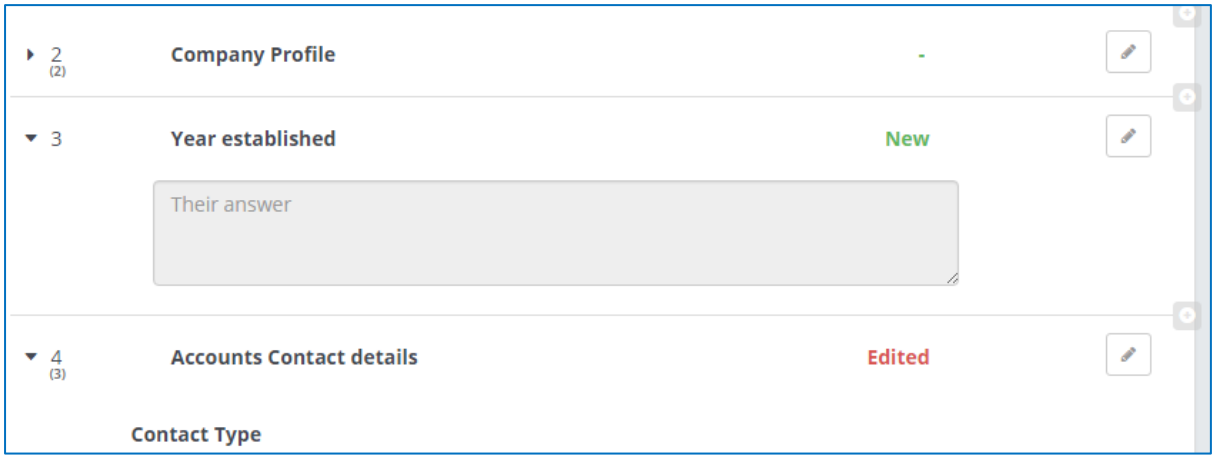
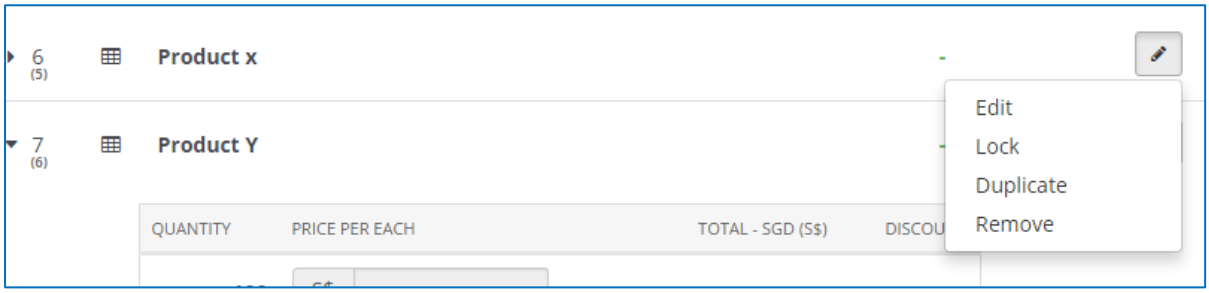
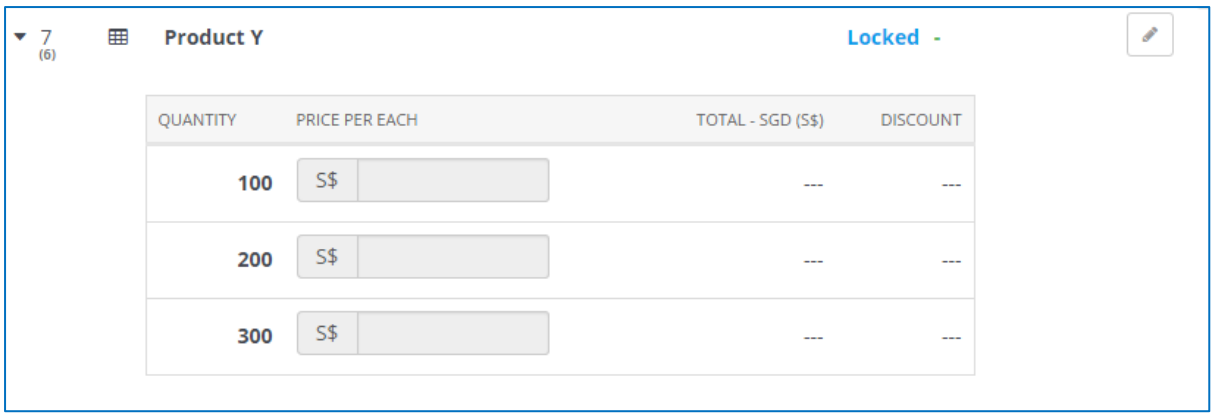
Similarly, any suppliers you marked as unsuccessful will be removed but new ones can also be added to this new stage.

In both the buyer and supplier's view all changes will be marked with ‘New’ or ‘Edited’, while any questions that were carried over unchanged will be marked with the “-“ symbol.



You can also choose to lock certain questions which will block the supplier from editing their previous answers.





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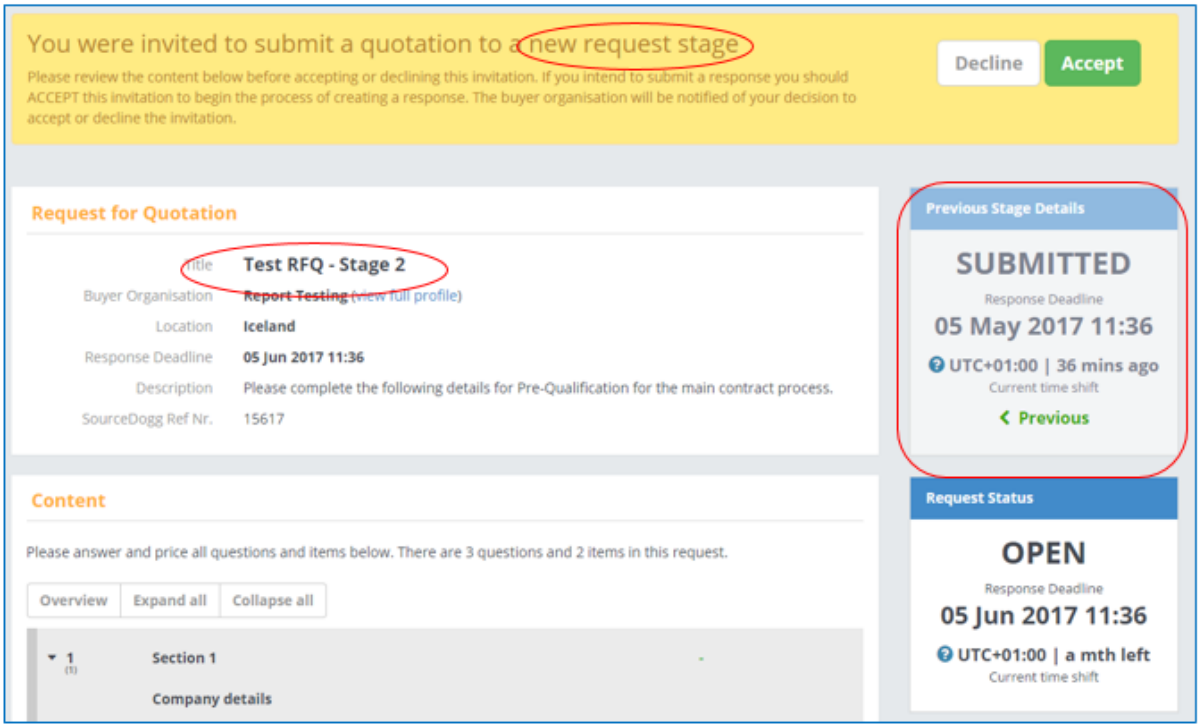
Once the details of the 2nd stage have been finalised you are ready to publish as before.

The supplier will receive an email inviting them to the new stage and it will be clear when they are accepting it that it is related to the previous stage.



When the deadline for this stage has passed you can assess the responses in the same way as the previous stage. Once responses have been reviewed or scored the 'Decision' tab will again appear and this time you have the option of running another stage or reaching the final decision in the 'Actions' drop-down menu.

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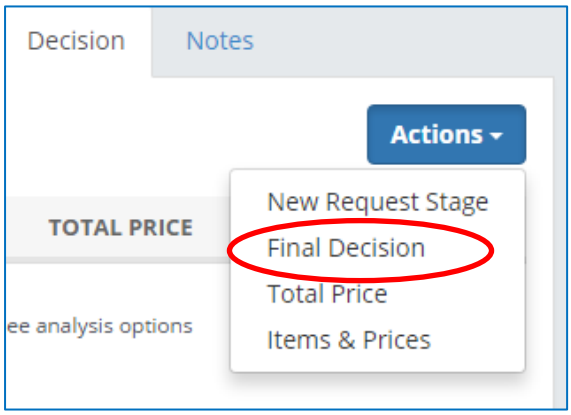
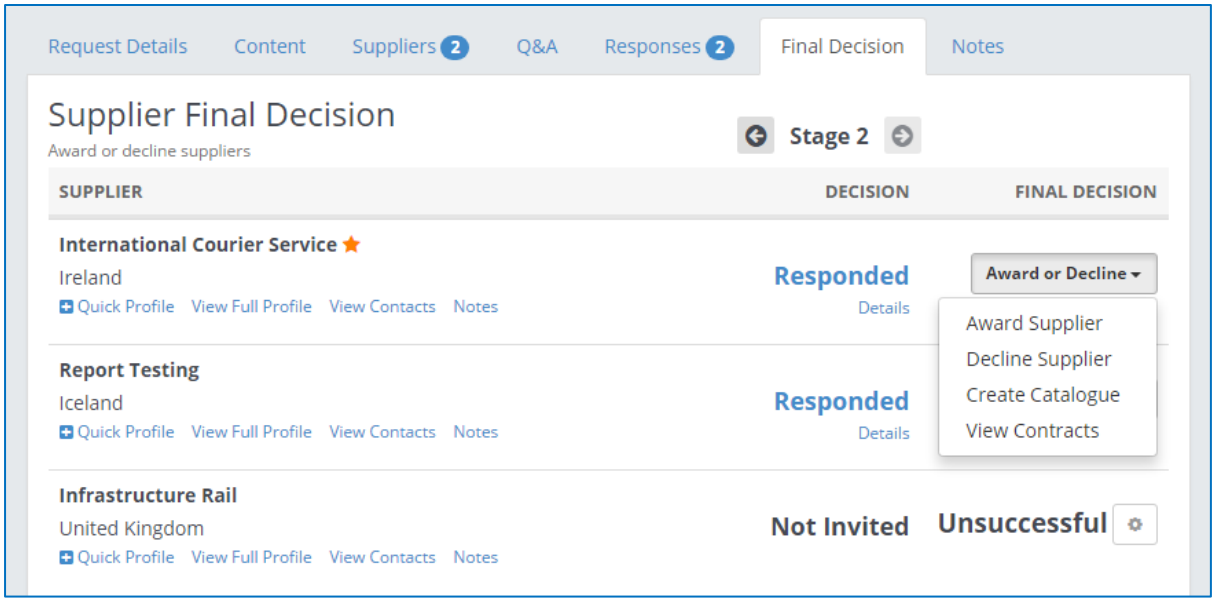


Selecting 'Final Decision' will create a new tab. All suppliers, shortlisted and unsuccessful, in previous requests are brought forward to the final decision tab. Only shortlisted suppliers can be awarded or declined at this stage.

With this tab you can view each of the stages leading up to the final one by clicking on the ← and → symbols. This will cycle the 'Decision' column between stages.



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