Supplier Management

Date: May 2017
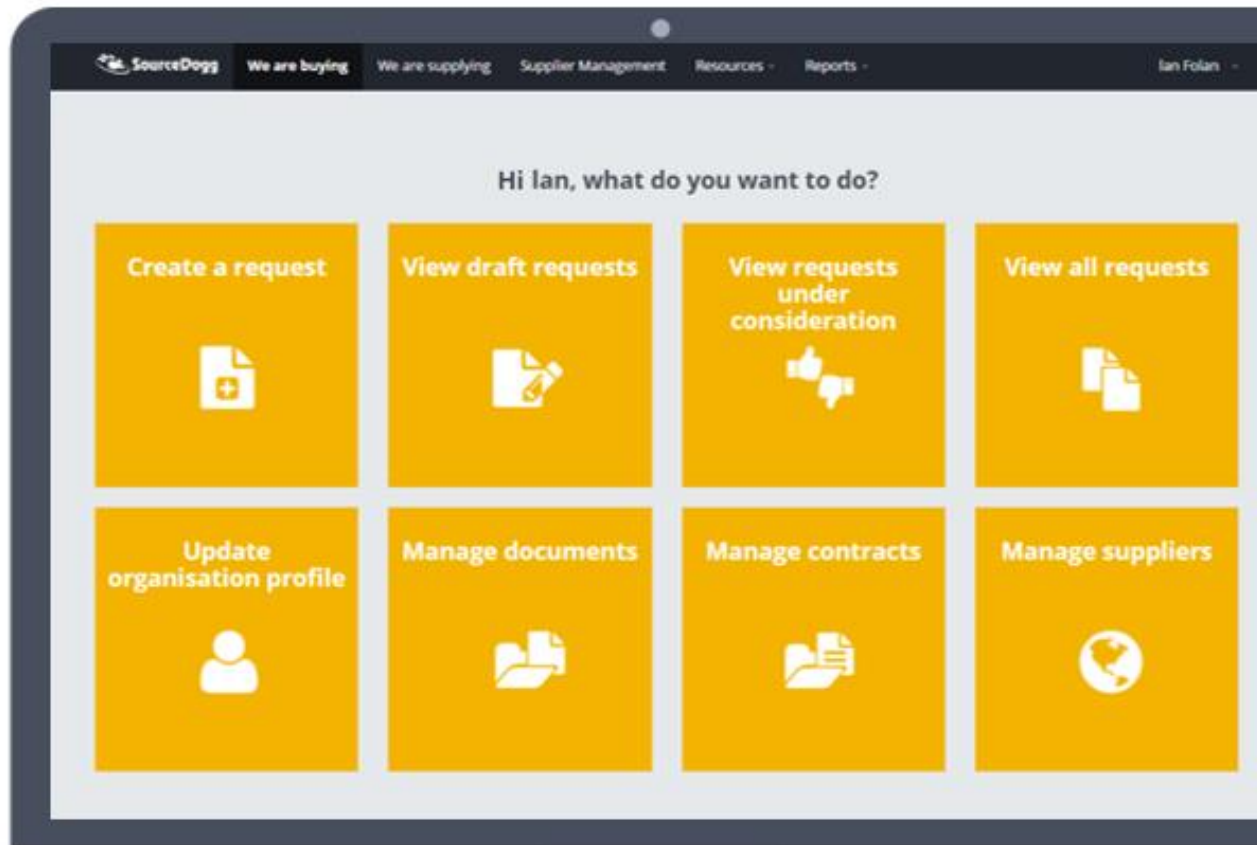
Contents

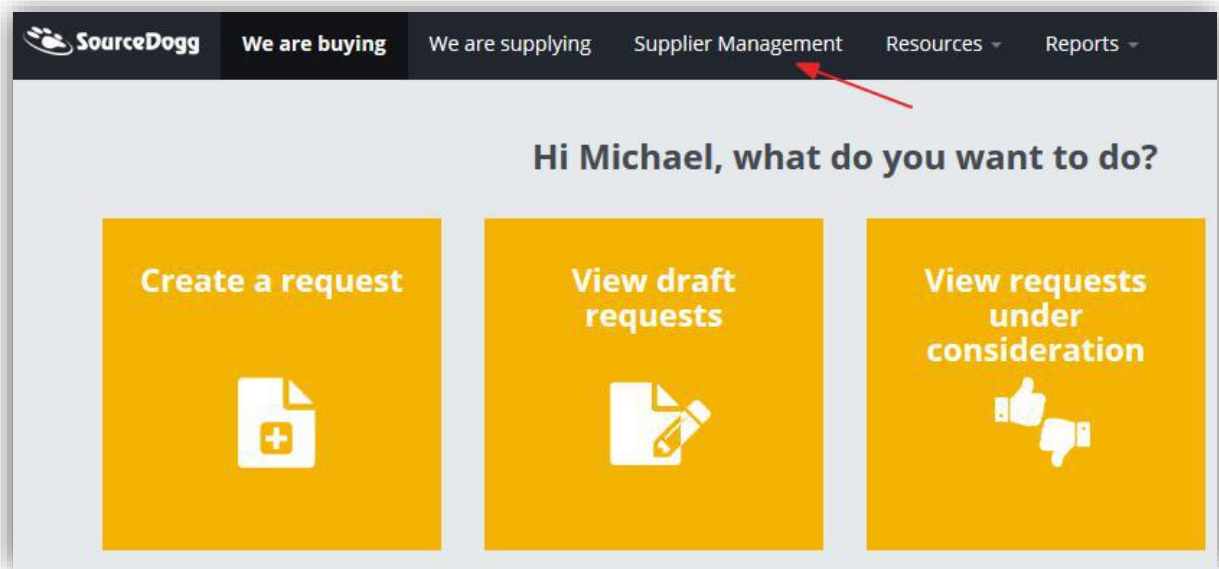## Supplier Profile

Introduction

Each supplier registered in SourceDogg has a supplier profile created for them. By opening the supplier profile, the buyer can see the list of interactions with the given supplier, including the list of eRFx that the supplier was invited to, contact details, certifications, documents, etc. Every time a buyer requests any data from a supplier, this is automatically saved into a supplier profile and visible to the buyer at any stage.

To access the supplier profile, the user needs to click on the Supplier Management button on the SourceDogg menu bar.

After searching for a particular supplier, the user can open the supplier profile by clicking on the "View Full Profile" button.

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Supplier profile is opened in a separate browser window, with several tabs, each containing a different type of information.

Overview

Overview tab contains the basic information about supplier's organisation as provided by the supplier. Below this, there is a list of tags that have been used by the buyer to categorise the supplier. This information can be used for fast search of the supplier.
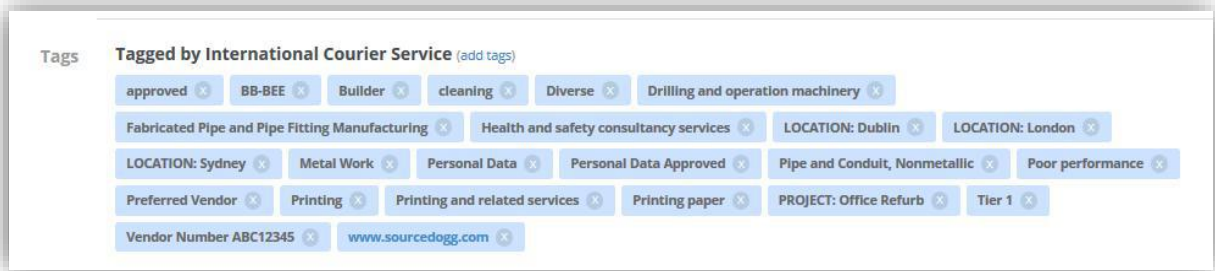
It also displays the activity rating of a supplier. SourceDogg uses a "traffic light" system, with a green circle meaning someone in this organisation has logged in their account in the last 14 days. In the case of an orange circle, there has not been any activity on the account for more than 14 days. For accounts with more than 6 months of inactivity, a red circle is shown.

Below the activity rating, there is a list of supplier profile custom fields. These are internal fields set up by an admin of a buying organisation and can contain various types of information as defined by the buyer. There can be an unlimited number of custom fields created and they would be visible in each supplier's profile. It is possible to define verification patterns for entering the data or use pre-defined drop-down lists. This ensures the accuracy and consistency of the entered information and helps for future reporting on the saved information. An admin user has the option to also define the colour of custom fields.

Timeline

In the 'Timeline' tab a list of contracts, requests, certificates and catalogue orders related to a particular supplier is displayed, along with their current status (e.g. current, responded, expired, etc.) The records are sorted from the newest to oldest. By clicking on the 'Open' button a user can access the records that will open in a separate window.

Contact

The 'Contact' tab lists all the contacts that were collected from the supplier over time using the contact type of question in the RFP. Every time new details are collected; these get automatically updated or added to the supplier's profile.

If an address is collected, a view link is added that will open a new window and can display the address in Google Maps.

Contact Name	Contact Role	Details		Contact Type	Last Update
Anne Morris	Accounts	Phone Email	555-1234567 anne@suppliera.com	Accounts Dept	22-Aug-2016
David Tenent	Procurement Manager	Phone Email	4810904 david.tenent@suppliera.com	Customer Support	18-Aug-2016
George McDonnell	Escalation specialist	Mobile Email	0865946694 suppliera@demosupport.sourcedogg.com	Point of Escalation	25-Oct-2016
Kenneth Jones	Accounts	Phone Email Address	01-9595 5599 kjones@accounts.com Bennelong Point, Sydney NSW 2000, Australia View	Accounts / Remittance	28-Aug-2015

Responses

In this tab, the user can access the list of all responses submitted by this supplier in the past, along with the date, score, price and status of the response. Clicking on the View button will open the request and allow the user to review the response.

22-Aug-2016	PO creation testing request (Quotation)	8 Questions 5 Items	98.33 %	€ 34,570.24	Submitted	View
18-Aug-2016	New request from 'Excel question testing - RFQ for building... (Quotation)	11 Questions 0 Items	89.13 %	-	Unsuccessful	View
11-Aug-2016	Test TBS (Quotation)	1 Question 0 Items	-	-	Submitted	View
02-Aug-2016	Example PQQ - Subcontracting (Information)	2 Questions 1 Item	-	€ 25,000.00	Submitted	View
21-Jun-2016	Speedy Sample Request (Tender)	5 Questions 99 Items	-	£ 259,890.00	Submitted	View

Certifications

Here all the certification collected using the 'Certificate' question in the RFP are listed. The issue and expiry dates for each certificate, along with the title and the verification date are shown. By clicking on the cog button on the right, the user can view or verify certification.

Suppliers are reminded on a regular basis when their certificates are expiring, and they are asked to update their certificates on SourceDogg. When they do this, the certificates are automatically shared in their supplier profile, ensuring the buyer has the most up to date certificates from all their supplier.

Figure 1 View Certification

Internal users of a buying organisation can verify the certificate by clicking on the verify certification button.

Documents

The 'Documents' tab contains all the files that the supplier submitted as part of an eRFX in the past. The view includes the date the file was submitted, the name of the eRFx, document type and the size of the document. By clicking on the document name, the user can download it from SourceDogg.

Contracts

The 'Contracts' tab lists all the contracts with the given supplier. It also displays the values entered for the custom fields as defined by the admin user. Up to 5 custom fields can be set up to be visible in this view.

TITLE	CONTRACT OW...	CATEGORY	TYPE OF THE C...	BUSINESS UNIT	DEPARTMENT	LAST MODIFIED	
External Audit Services	Tony Palmer	Professional Services		Compliance & Risk		16 Nov 2016 16:17	⚙
Cleaning Contract 2016	Alison Baker	Facilities	Limited company	FM	Marketing	16 Nov 2016 16:30	⚙
Service Agreement - 2016	Carolina Parker	Facilities		FM	Procurement	05 Dec 2016 15:02	⚙
Security Contract	Caroline Parker	Software - IT	Sole Trader	R&D	Legal	29 Nov 2016 10:41	⚙
Wholesale Agreement Delta REF 1998730KI-21						07 Jun 2016 14:24	⚙
Consultancy Services	Tony Palmer	Professional Services	Public liability company	Compliance & Risk		10 Nov 2016 17:23	⚙

By clicking on the title of the contract user can access and edit the details of the contract. When using the cog button on the right hand of each contract, the user can select to edit, delete or download. They do as follows:

Edit – opens the contract in a new browser window and the user can make changes to the contract

Delete – this will delete the contract record from the repository.

Download – this will download all the documents associated with the contract. All files will be downloaded in a single Zip file.
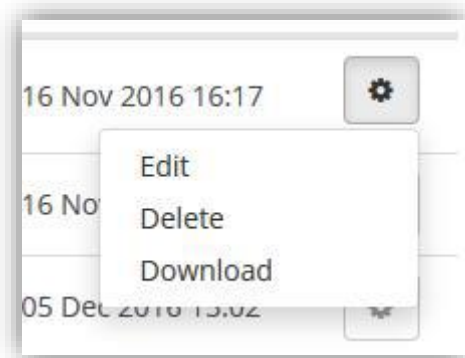
Catalogues

This tab shows the items (products and services) that the supplier priced in the past. Buyer can use this information to create catalogues of items and create order or new eRFx.

By selecting the "Create New", the user can create a new order pad and add the products from the catalogue to it.

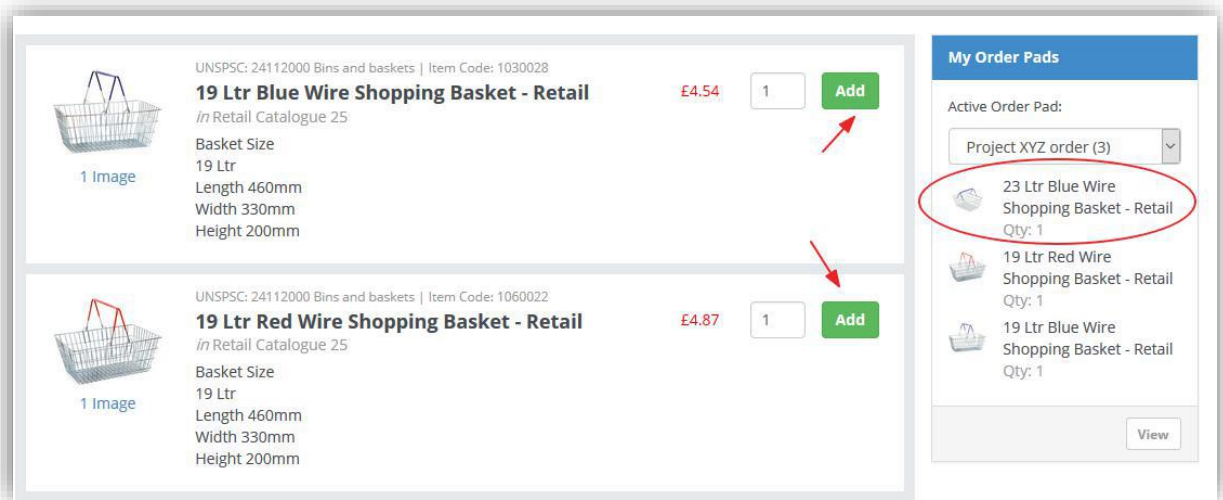When the order pad is created by clicking on the "Add" button the products are then added to order.

Clicking on the view button will open the order pad and allow the user to review all the items and quantities in the order.
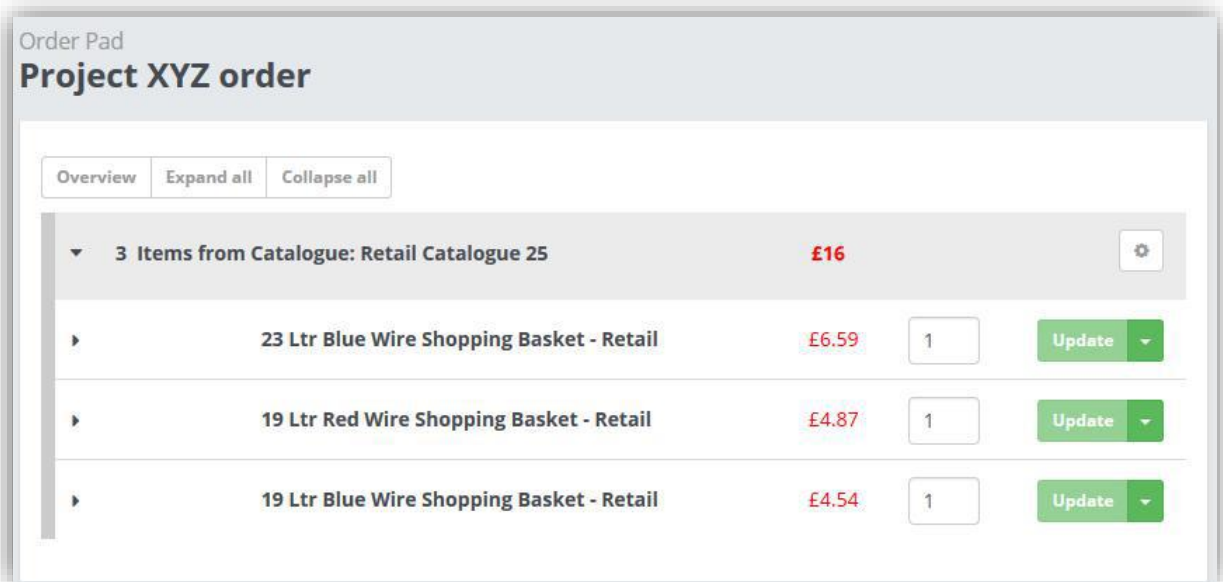
The order pad then can be used to generate order or to use the items in the order pad and create a new eRFx event.

Notes

In the notes tab, the buyer can save the internal notes related to a supplier. The existing notes are listed in chronological order. When adding the new notes, the user is able to attach files and save or post the note to the list.

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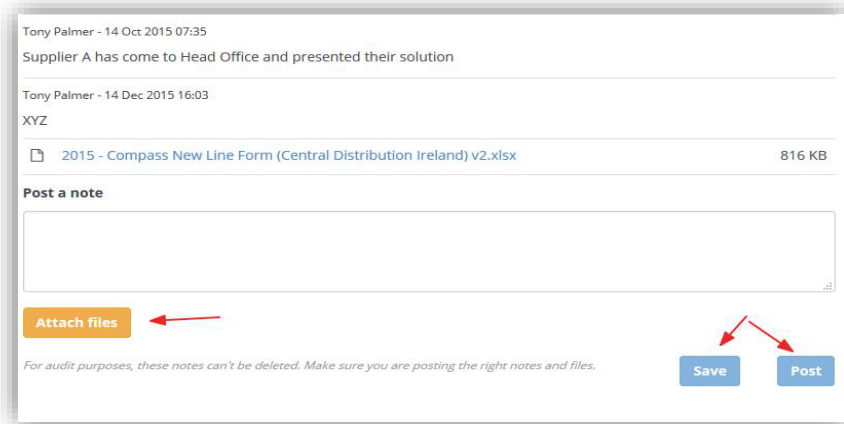
Supplier Search

Search Tool

When searching for a particular supplier in SourceDogg, the buyer needs to access the supplier management module from the black menu bar on the top of the screen.
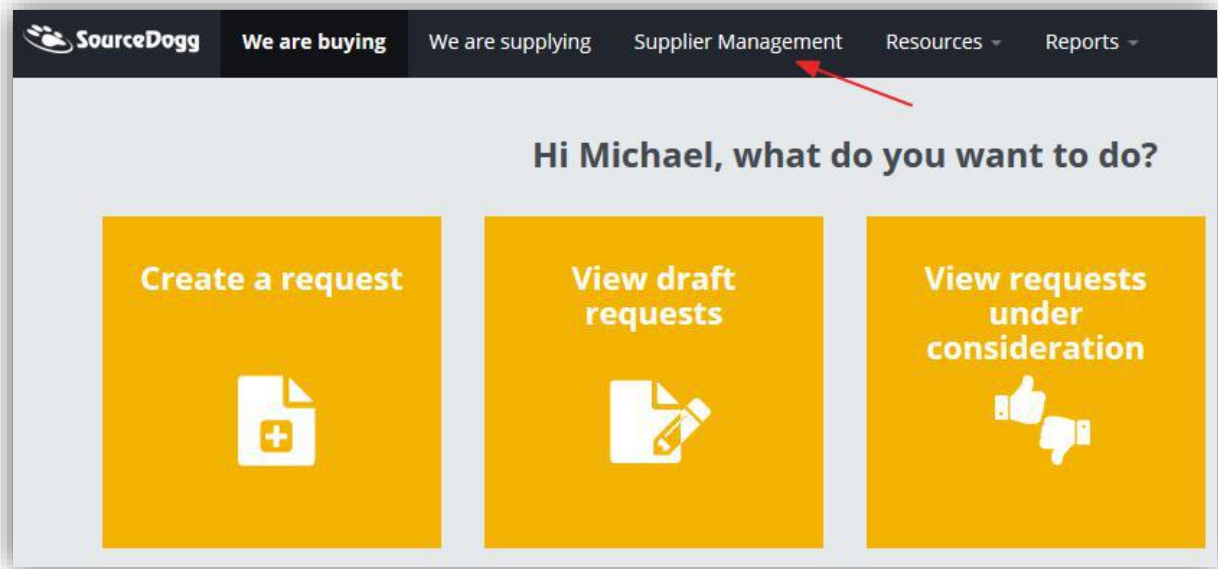
The default view of the supplier management will be displayed, giving the buyer the ability to filter down the search based on their requirements.

1. **Supplier Name** - to search for the supplier by name, type the part of full supplier name into the text box and press enter or hit the search button. The system will display all the matching suppliers. Please note there could be several ways how suppliers are registered, e.g. with Limited or Ltd., it is, therefore, better not to restrict the text search with too many specifications.

2. **Scope of Search** - the user can select to search the full supplier directory or opt to use only the organisational pool, where often used suppliers can be saved. Alternatively, saved searches can be defined as part of the supplier selection process. Please note the access of each user to the scope of search is based on their user permissions and it is possible to limit the search to only predefined saved searches (to be described later in this document)

3. **Tags** - if the buying organisation is using tags to categorise their suppliers, this can be also used to search for suppliers with particular tags, e.g. category or location
4. **Custom Fields** - these are customisable supplier profile fields than can be used to capture additional information regarding the supplier. If defined by the admin user, they can be used to filter down the supplier based on the values in custom fields.
5. **Country** - to filter by the country, select from the list displayed, or type the country into the text box and select it. Multiple countries can be selected and supplier search will reflect this.

Directory View

When the search is run, the following is displayed:
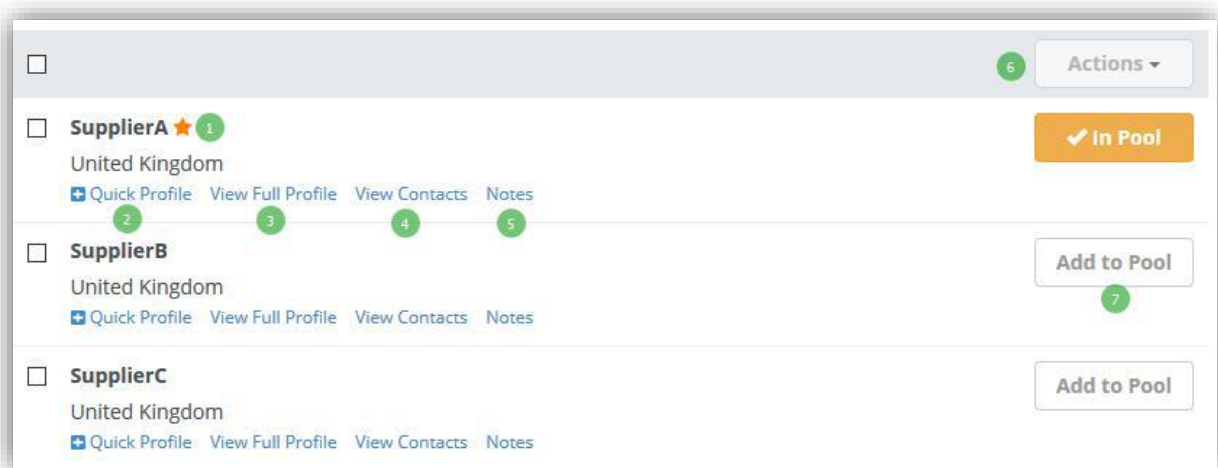
1. **Supplier Name** - lists the supplier's name in the form the supplier has registered. If a star symbol is shown next to supplier name, this denotes the supplier has been added to the supplier pool.
2. **Quick Profile** - this displays the basic information regarding the supplier: the overview, tags, and activity rating.
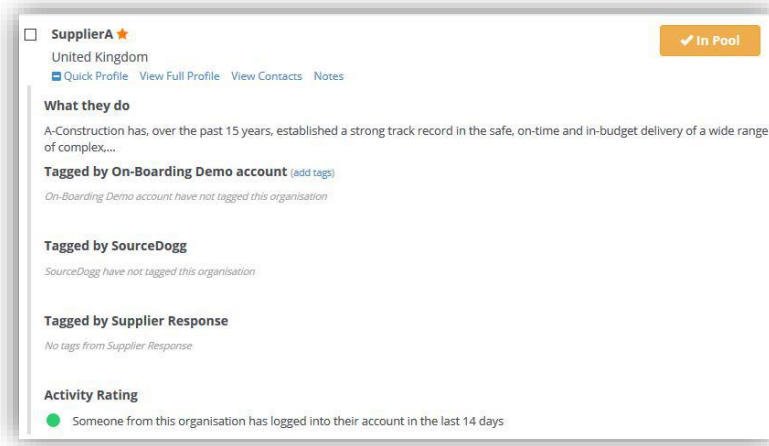
3. **View Full Profile** - will open the full supplier profile in a new window, as described in the first section of this document
4. **View Contracts** - if this option is selected, the system displays all the contracts where this supplier is selected as participant
5. **Notes** - opens profile and shows all internal notes related to this supplier

Saved Searches

Creating Saved Search

Admin users of SourceDogg can now create a 'Saved Search' which limits the ability of the user to search for suppliers in both RFPs and supplier management to defined searches. To create a new saved search, the user needs to select settings from the top right-hand corner and then select the supplier pool settings option from the menu on the left.
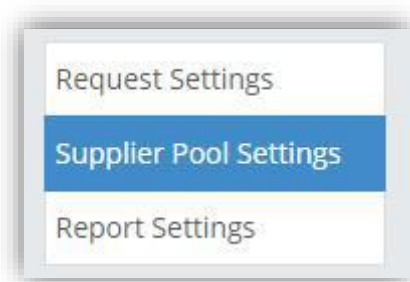
To create a new Saved Search, click on the 'Add Saved Search' button and fill the details in the form.

SourceDogg
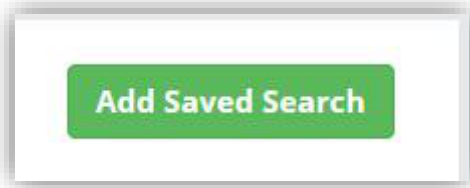
Add Saved Search

Name – enter the unique name of the search

Description – provide further information about the saved search

Supplier Pool only – selecting this option limits the search to the pre-defined pool of suppliers

Tags – adding the tags to a search will result in returning suppliers who have been tagged with certain tags by your organization

Profile Custom Fields – the user can filter down the search results by selecting the value from supplier profile custom fields. Multiple custom fields can be chosen.

Country – selecting the country from the list will limit the search to suppliers from given country. Multiple countries can be selected.

User Groups – adding the user groups that will have access to this saved search when searching for suppliers.

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User Permissions Settings

In the next step, the admin user can amend the user's permission in supplier management and only allow selected users to search by saved search. To do this, admin user must access the user management screen selecting Settings > Users. After selecting an individual user, the Supplier Search Permission Group can be changed from "Full Search" (default value) to "Saved Search Only".

This will disable the 'All Supplier Directory' and 'Supplier Pool' only options in the supplier management and will default to the saved search.

The saved search will also list all the filters defined within it. The user is, however, not able to change any of the settings of the search.
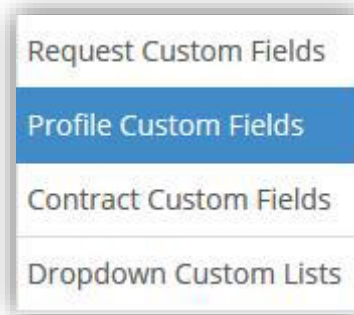
The user is only able to refine the search further by using the supplier name field to search for a particular supplier within the Saved Search.

Supplier Profile Custom Fields

Supplier profile custom fields are fully customisable text fields that buyer can use to capture any additional information about the supplier, information such as VAT numbers, company registration number, date of incorporation and so on. Any organisation using SourceDogg can have an unlimited amount of these created and it can be used for further reporting on this information or creating subsets of suppliers depending on the information collected in the custom field. (e.g. suppliers with the category facility management can be filtered based on the custom field value)

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Creating a Custom Field

To create a custom field, the user must be an application admin. First, you need to open the organisational settings and then select Profile Custom Fields from the menu on the left.
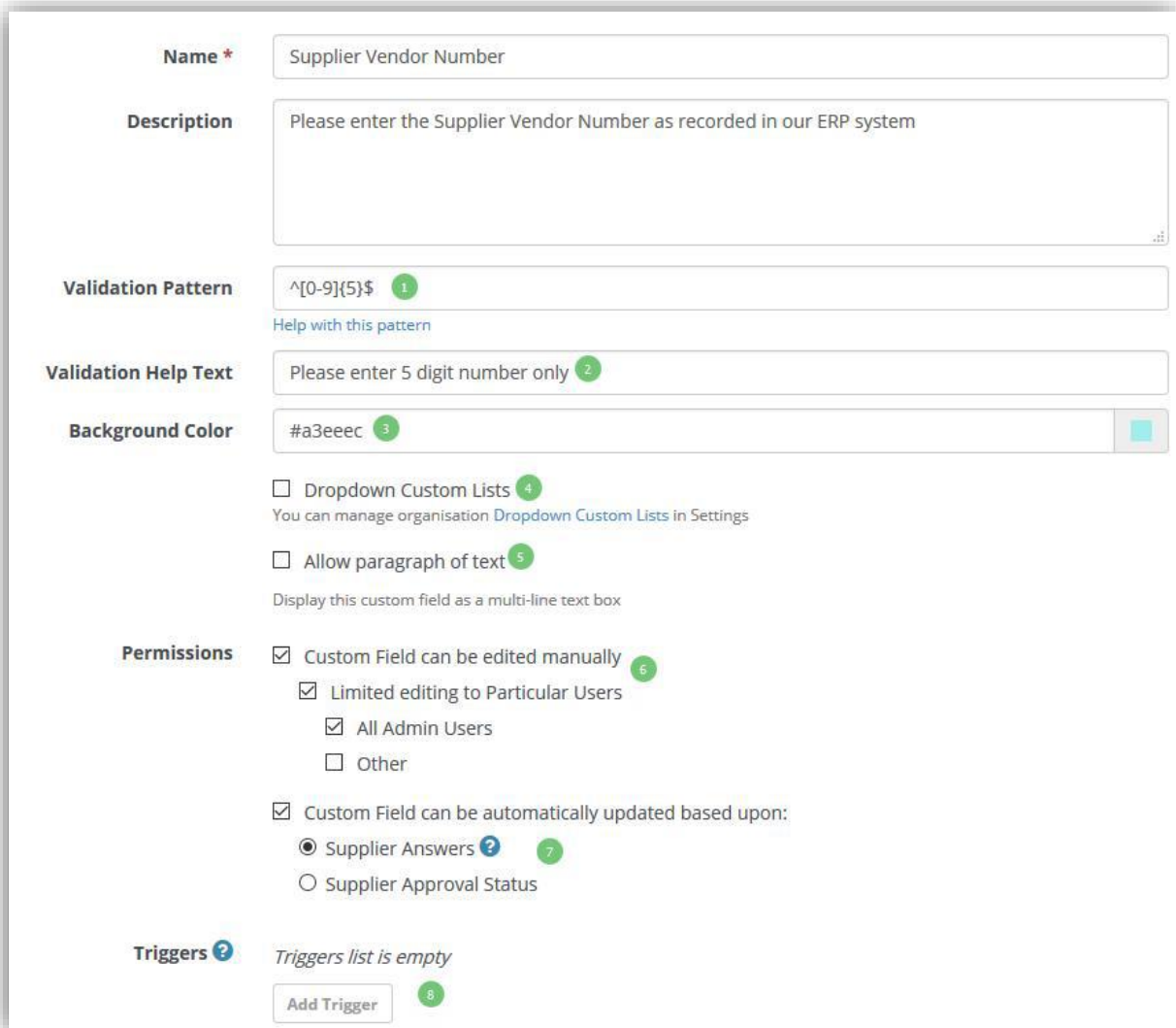

The custom fields already created are listed by their names and description entered when the custom field was created. The order of the custom fields can be easily changed by simply dragging & dropping the items within the list. By clicking on the cog on the right-hand side you can edit or delete the custom field. To create a new custom field, click on the "Add Custom Field" button.

1. **Validation Pattern** - here you can define the validation pattern for the data to be entered into a custom field. Any data entered must fulfil the predefined condition, otherwise, it will not be saved. There are a handful of examples available, however, if you have a specific requirement regarding the validation pattern please contact SourceDogg customer service department here.
2. **Validation Help Text** - this is a mandatory requirement when validation pattern is used. It helps suppliers to understand the format of information that they should enter.
3. **Background Colour** - using the colour picker you can select the colour for the custom field, which can be particularly useful if you want to separate the information of the similar nature, e.g. financial information. The application also accepts entering the colour code in hexadecimal format.

4. **Dropdown Custom Lists** - instead of a supplier entering the data into the text field, you can create a drop-down list with the values you would like to use. The supplier then selects one of these and does not need to enter anything. This improves the accuracy and validity of the data, also helping to reduce miskeying the information and keep the data in perfect order

5. **Allow Paragraph of Text** - custom field will allow entering larger amount of text - with the limit of 2000 characters

6. **Permissions** – The "Custom field can be edited manually" option determines whether information can be edited by SourceDogg users. If internal required, you can limit the ability to edit custom fields to to all Admin users or specify individual users who will have the ability to edit. The "Custom Field can be can be automatically updated based upon" option allows custom fields to be updated based on "Supplier Answers" to question in RFx. Alternatively the custom field can be set to update based on the "Supplier Approval Status". This is the 'Approved', 'Approved with Exception', or 'Rejected' status bestowed during the Supplier Approval process in a Suppler Onboard request.

7. **Triggers** - it is possible to set up triggers based on the values that are entered into the custom field and the consequent action that occurs if defined value is entered.


The example above can be used in the process of continuous supplier performance evaluation and if a score of a supplier drops below designated point, the supplier will no longer be invited to any pending RFx events and will be removed from the supplier pool.

Supplier Pool

The supplier pool in SourceDogg can be used to select and save the most frequently used suppliers and thus save time when inviting the suppliers to RFx events. Also, based on organisational policy, and combined with other SourceDogg features, it can be used to save the approved suppliers that the procurement team will be able to invite to any event published. Saved searches or user permissions can also be created to limit the users to only using the suppliers in the pool.

### Adding/removing the supplier from the pool

To add a supplier to a Pool, search for a particular supplier by name or tag and then click on Add to Pool button (the permissions for this action are configurable in admin settings)
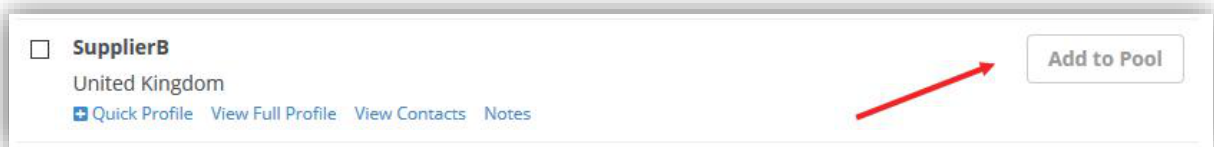
To remove the supplier, you need to click on the 'In Pool' button, this changes to "Remove" as you move the cursor over the button.


Once the supplier is added to the Pool, a little yellow star is added to the name of the supplier to denote this change in status. To add multiple suppliers to the pool at once, select the checkbox next to its name and then select the action button and pick add selected suppliers to supplier pool.
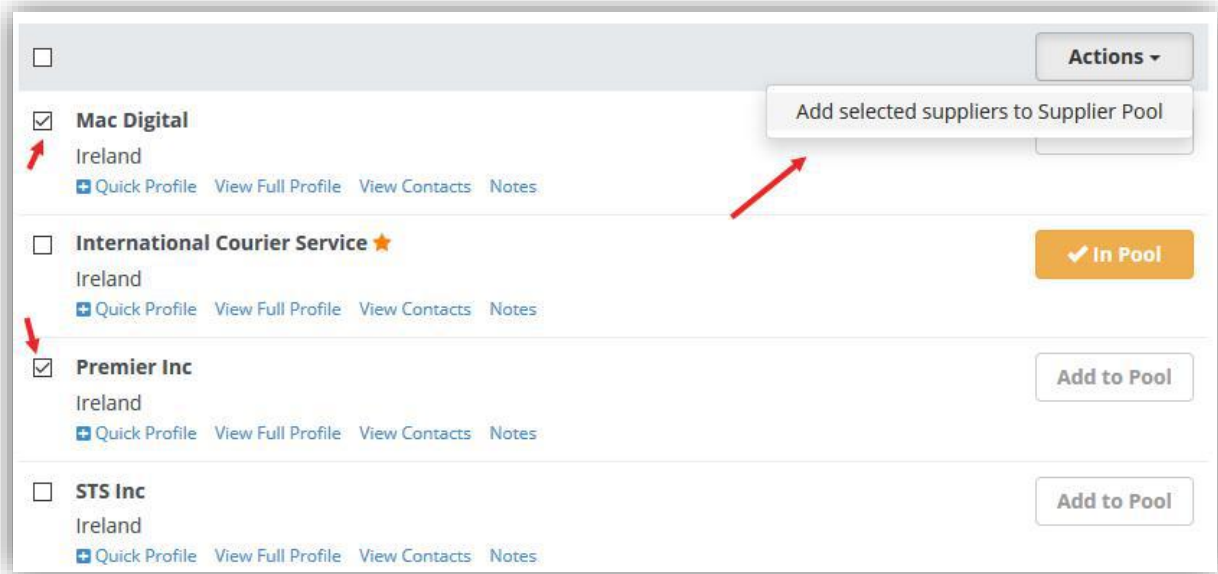
Accessing the Supplier Pool

To access the supplier pool, you must open the Supplier Management screen from the main menu and select "Supplier Pool only" option from the scope of search. It is also possible to access the supplier management when inviting a supplier in the RFx event.
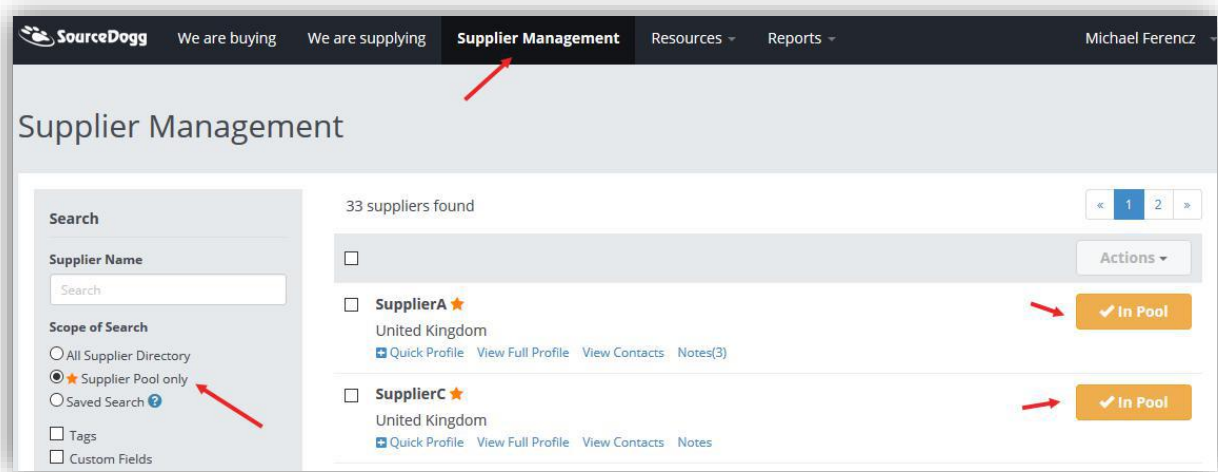
By selecting the supplier pool only option in the RFx, this shortlists all suppliers added previously to the pool and by clicking on the add button the supplier is invited to the RFx.

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