Manage Your *Discovery* Suppliers

CREATE A SUPPLIER

Create and manage your suppliers from the *Master Data -> Supplier* category.

1. Select to 'Create a New Supplier'

2. Once a new record is created, populate each tab in the supplier record with the applicable information. The Business, Contract and Insurance Info entered will be visible on the Supplier record.

Basic Info

Buying organizations using only Vroozi Discovery: The following fields must be completed:

- Name
- Vendor ID
- Address
- Phone Number
- Language
- 'Supplier Discovery' Toggle - must be turned on. (shown on right)

Note: Buying organizations using *Vroozi Discovery* with other Vroozi modules will need to update additional toggles on this tab. Toggles will vary based on your Master Data configurations and business workflow needs. Please see the Vroozi Purchase Administrator Guide for further details.

Business Info

None of the details listed in this tab are required. They do however enrich the information your users will have access to when selecting a supplier.

Payment Terms

● Associated Payment Terms to each supplier. Payment Terms are created with the Master Data category.

Categories

● Associate each Supplier to a specific category(s). When a user searches by category all associated Suppliers will appear. (shown below)

Description

● Content entered here is often provided by the Supplier but can of course be customized for your specific business needs. The descriptions will then be listed with the other Supplier information during a Supplier search.

Search Keywords

● Associate keywords to each supplier. Keywords can be used by your end users during a Supplier Discovery Search.

● User view of a keyword search for "chair":

Contract Terms

Like 'Business Info', none of the information listed in this tab is required. It is a best practice to update 'Contract Status', 'Effective Date of Agreement',

'Contract Terms'. The specific contract or other contractual documents can be attached for easy reference.

Insurance Info

Like 'Contract Info', none of the information listed in this tab is required. It does however, enrich the information your Basic and Power Users have access to.

SUPPLIER ATTRIBUTES

Direct spend to specific types of providers or social causes by creating attributes that can then be assigned to suppliers.

1. Select the 'Name' users will see when selecting to search by that attribute.
2. 'Status' will default to Active but may be set as Inactive at any time during creation or post creation.
3. Write a brief attribute 'Description'.
4. Select a pre-populated icon or upload your own.
5. Save

Supplier Attributes

	Name	Icon	Supplier Count	Created Date	Status	Action
☐	Green Certified	♻	1	06/29/2020	Active	🗑
☐	Preferred Contract	∞	1	06/29/2020	Active	🗑
☐	Women Owned	WO	2	06/29/2020	Active	🗑

✔ Activate ✖ Deactivate Create A New Attribute

Create New Supplier Attribute ✕

Name * ①
Women Owned

Status * ②
Active

Description * ③
Women are majority owners in organization.

Use a predefined icon ④
○ DV ○ ♻ ○ MO ○ P ○ VO ● WO

or, Use your own
Choose File No file chosen

Associated Suppliers
Click to select supplier(s)

Cancel Save ⑤

SUPPLIER CATEGORIES

Allow for Supplier searching by Category! Once created, categories can be associated with Supplier records.

Any Supplier created in Vroozi Purchase Master

Categories
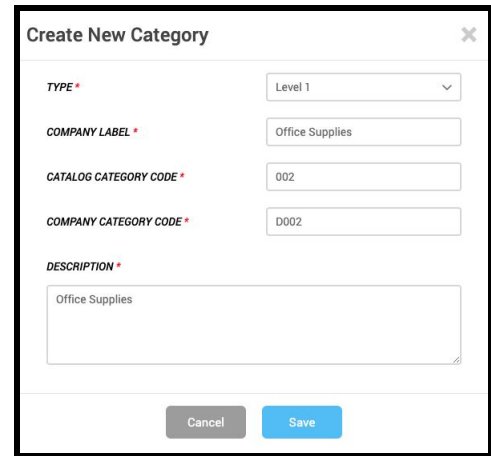
Catalog Category Code	Company Category Code	Company Label	Level 1	Level 2	Level 3	GL Code	Description	Action
004	D004	Automotive Repairs	X				Vehicle repairs including parts and labor.	🗑
003	D003	Automotive Supplies	X				Automotive supplies, not including repairs.	🗑
001	D001	Furniture	X				Furniture	🗑
002	D002	Office Supplies	X				Office Supplies	🗑

Create A New Category

Data table with Supplier Discovery toggle turned on will display.
Create and manage supplier categories.

Create Categories

1. Select Type; Level 1, 2 or 3.
   - ✓ A **Level 2** category is a subcategory associated with a Level 1 category.
     - Example: Level 1 (parent) category is "Marketing" and the Level 2 (child) category could be "Materials".

   - ✓ **Level 3** category is a subcategory associated with a Level 2 and Level 1 category.
     - Example: Level 1 (parent) category is "Marketing" and the Level 2 (child) category could be "Materials" and the Level 3 category is "Brochures."

Note: A Level 1 category with "subcategories" cannot be deleted until the level 2 or 3 categories are deleted or assigned to a different category.

2. Enter 'Company Label'. This will be a category assignment displayed on any supplier record associated with it.
3. Enter 'Category Code'.
4. Enter 'Company Category Code'.
5. Enter a brief description.

Saved Categories can then be associated with a particular supplier on the supplier record. (shown on right) Suppliers may be associated with multiple categories.
Your users can then search for suppliers associated to a specific category. (next page)
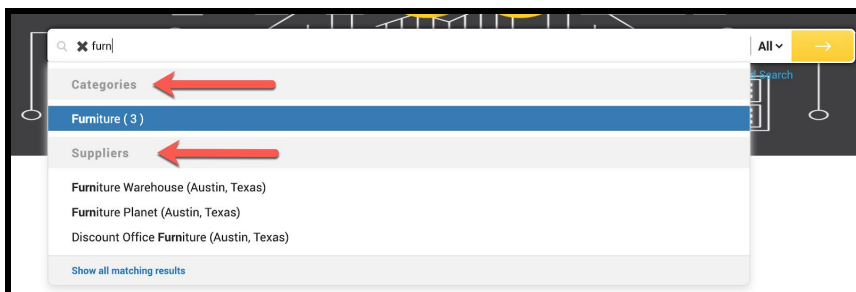
PAYMENT TERMS

Create and manage Payment Terms.

Active Payment Terms can be associated with a particular supplier on the supplier record. (shown below)

CONTRACT TERMS

1. Create and manage Contract Terms from this view.

2. Once created, contract terms can be selected and applied to Supplier records on the Contract Terms tab.

CONTRACT STATUS

Create and manage Contract Statuses from this subcategory. Once created, Contract Status can be selected and applied to Supplier records on the 'Contract Info' tab.

- Only statuses listed as 'Active' can be selected on the supplier record.
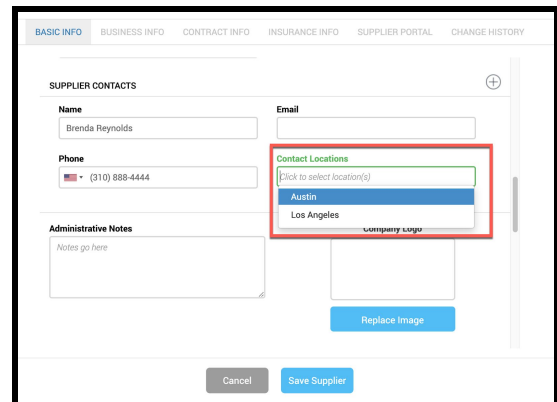
SUPPLIER DISCOVERY LOCATIONS

Allow your users to search by location!

Create and manage 'Locations' from this subcategory. Once created, Locations can be selected and applied to Supplier records on the 'Basic Info' tab. Once created, locations can be associated with your suppliers. Only locations listed as 'Active' can be selected on the supplier record.
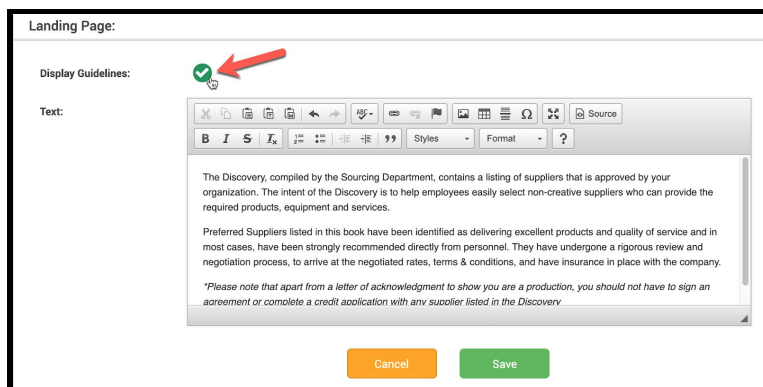
GUIDELINES

Customize the terms and guidelines to be applied for sourcing and use of supplier information.

Indicate if you would like your end users to view Sourcing Guidelines. If desired, edit the Sourcing Guidelines they will see.

Guidelines created in this setting, are viewed and accessed by users at any time under the Sourcing Guidelines category of their navigation panel. See View Sourcing Guidelines for further details.