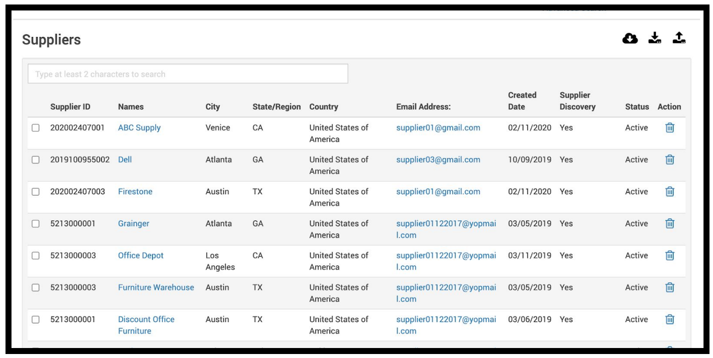
Manage Your *Discovery* Suppliers

Create a Supplier

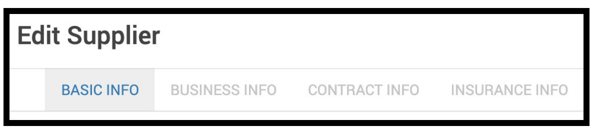
Create and manage your suppliers from the *Master Data -> Supplier* category.


Suppliers

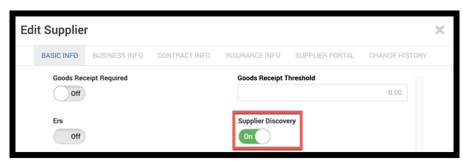
	Supplier ID	Names	City	State/Region	Country	Email Address:	Created Date	Supplier Discovery	Status	Action
	202002407001	ABC Supply	Venice	CA	United States of America	supplier01@gmail.com	02/11/2020	Yes	Active	
	2019100955002	Dell	Atlanta	GA	United States of America	supplier03@gmail.com	10/09/2019	Yes	Active	
	202002407003	Firestone	Austin	TX	United States of America	supplier01@gmail.com	02/11/2020	Yes	Active	
	5213000001	Grainger	Atlanta	GA	United States of America	supplier01122017@yopmail.com	03/05/2019	Yes	Active	
	5213000003	Office Depot	Los Angeles	CA	United States of America	supplier01122017@yopmail.com	03/11/2019	Yes	Active	
	5213000003	Furniture Warehouse	Austin	TX	United States of America	supplier01122017@yopmail.com	03/05/2019	Yes	Active	
	5213000001	Discount Office Furniture	Austin	TX	United States of America	supplier01122017@yopmail.com	03/06/2019	Yes	Active	

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



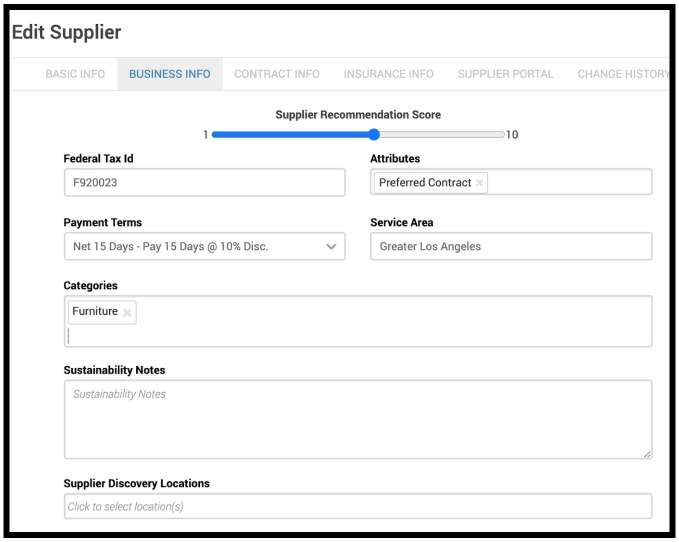
Buying organizations using only Vroozi Discovery: The following fields must be completed:

- 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

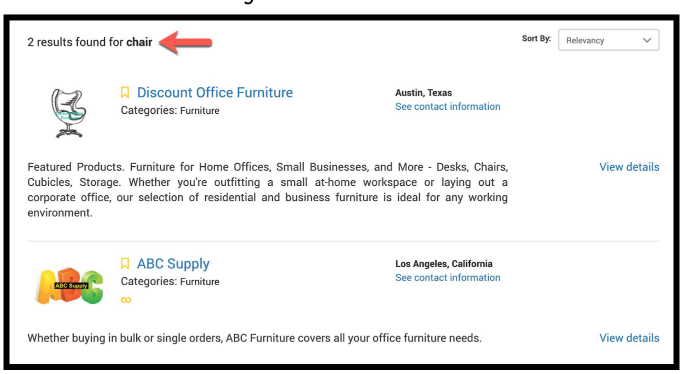
- Associate each Supplier to a specific category(s). When a user searches by category all associated Suppliers will appear. (shown below)

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

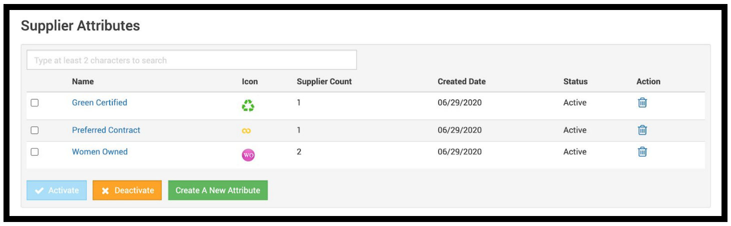
Like ‘Business Info’, none of the information listed in this tab is required. It is a best practice to update ‘Contract Status’, ‘Effective Date of Agreement’, ['Contract Terms'](). The specific contract or other contractual documents can be attached for easy reference.

Insurance Info

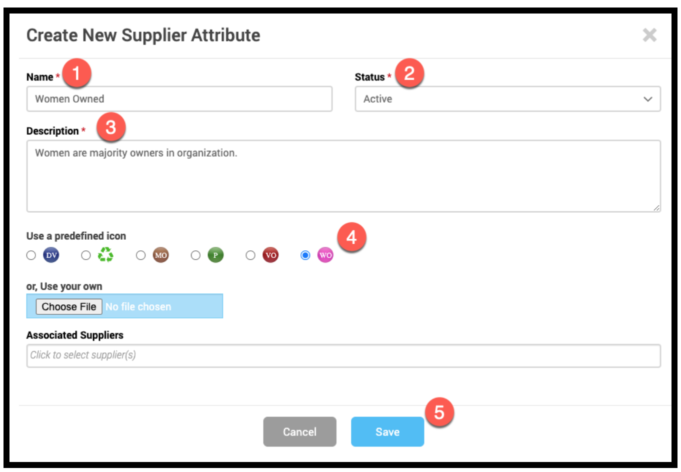
Like 'Contract Info', none of the information listed in this tab is required. It does however, enrich the information your Basic and Power Users have access to.

Supplier Attributes

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



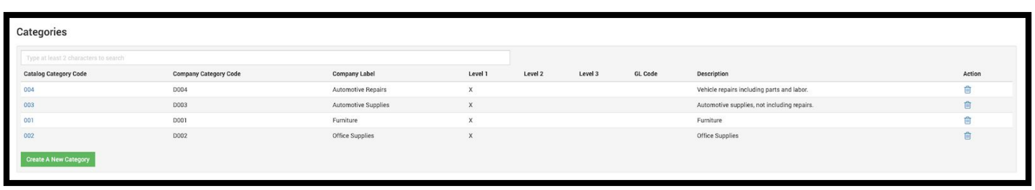
1. Select the 'Name' users will see when selecting to search by that attribute.
2. 'Status' will default to Active but may be set as Inactive at any time during creation or post creation.
3. Write a brief attribute 'Description'.
4. Select a pre-populated icon or upload your own.
5. Save



Supplier Categories

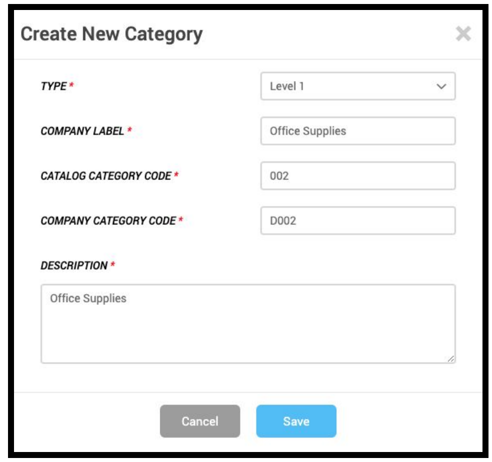
Allow for Supplier searching by Category! Once created, categories can be associated with Supplier [records]().

Any Supplier created in Vroozi Purchase Master



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

Create Categories

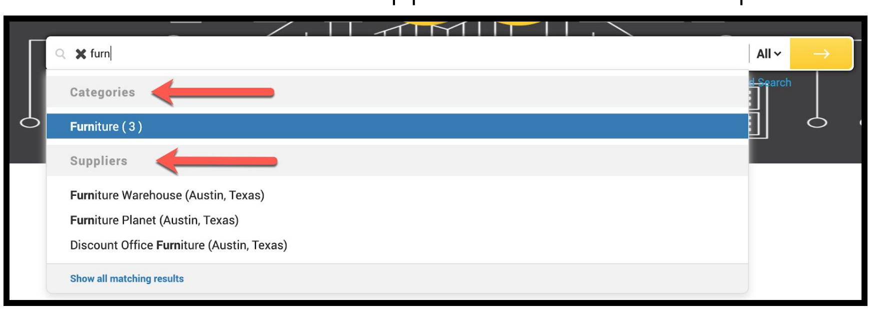


1. Select Type; Level 1, 2 or 3.
   - ✓ A **Level 2** category is a subcategory associated with a Level 1 category.
     - Example: Level 1 (parent) category is “Marketing” and the Level 2 (child) category could be “Materials”.
   - ✓ **Level 3** category is a subcategory associated with a Level 2 and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

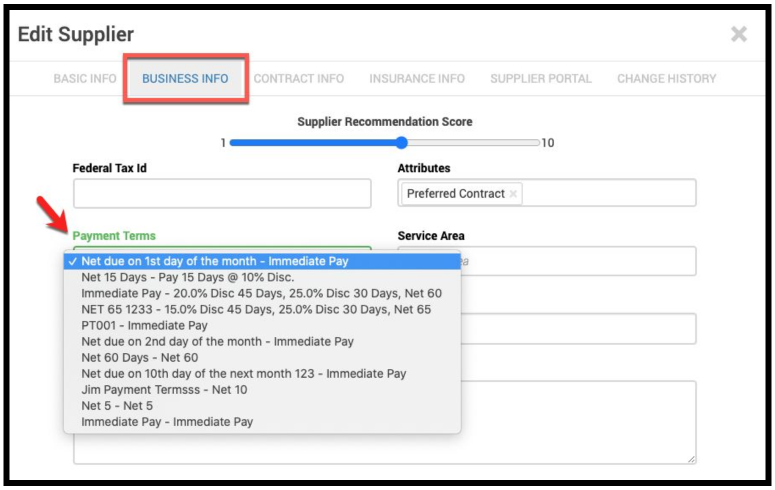
Saved Categories can then be associated with a particular supplier on the supplier record. (shown on right) Suppliers may be associated with multiple categories.
Your users can then search for suppliers associated to a specific category. (next page)



Payment Terms

Create and manage Payment Terms.

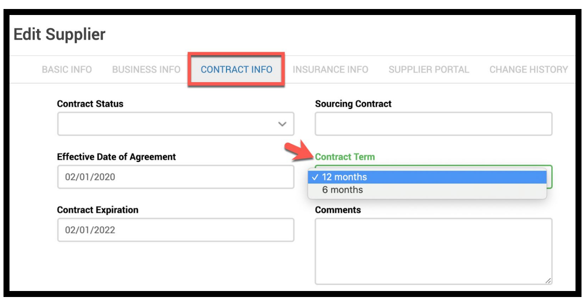
Active Payment Terms can be associated with a particular supplier on the supplier record. (shown below)



Contract Terms

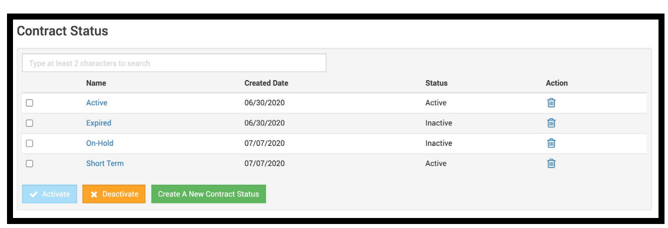
1. Create and manage Contract Terms from this view.

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.