

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.

Suppliers

Type at least 2 characters to search

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

Edit Supplier

BASIC INFO BUSINESS INFO CONTRACT INFO INSURANCE INFO

Basic Info

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

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

Edit Supplier

BASIC INFO BUSINESS INFO CONTRACT INFO INSURANCE INFO SUPPLIER PORTAL CHANGE HISTORY

Goods Receipt Required ☐ OFF

Goods Receipt Threshold 0.00

Ers ☐ OFF

Supplier Discovery ☒

Note: Buying organizations using *Vroozzi Discovery* with other Vroozzi 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 [Vroozzi 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.

Edit Supplier

BASIC INFO

BUSINESS INFO

CONTRACT INFO

INSURANCE INFO

SUPPLIER PORTAL

CHANGE HISTORY

Supplier Recommendation Score

110

Federal Tax Id

F920023

Attributes

Preferred Contract

Payment Terms

Net 15 Days - Pay 15 Days @ 10% Disc.

Service Area

Greater Los Angeles

Categories

Furniture

Sustainability Notes

Sustainability Notes

Supplier Discovery Locations

Click to select location(s)

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”:

2 results found for chair

Sort By: Relevancy

Discount Office Furniture

Categories: Furniture

Austin, Texas

See contact information

Featured Products. Furniture for Home Offices, Small Businesses, and More - Desks, Chairs, Cubicles, Storage. Whether you're outfitting a small at-home workspace or laying out a corporate office, our selection of residential and business furniture is ideal for any working environment.

View details

ABC Supply

Categories: Furniture

Los Angeles, California

See contact information

Whether buying in bulk or single orders, ABC Furniture covers all your office furniture needs.

View details

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’,

Discovery Suppliers 2

[‘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

Type at least 2 characters to search

	Name	Icon	Supplier Count	Created Date	Status	Action
<input type="checkbox"/>	Green Certified		1	06/29/2020	Active	
<input type="checkbox"/>	Preferred Contract		1	06/29/2020	Active	
<input type="checkbox"/>	Women Owned		2	06/29/2020	Active	

[Activate](#) [Deactivate](#) [Create A New Attribute](#)

Create New Supplier Attribute

Name ¹ Status ²

Description ³

Use a predefined icon ⁴

☐ ☐ ☐ ☐ ☐ ☐ ☐

or, Use your own

[Choose File](#)

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 Vroozii
Purchase Master

Categories

Type at least 2 characters to search

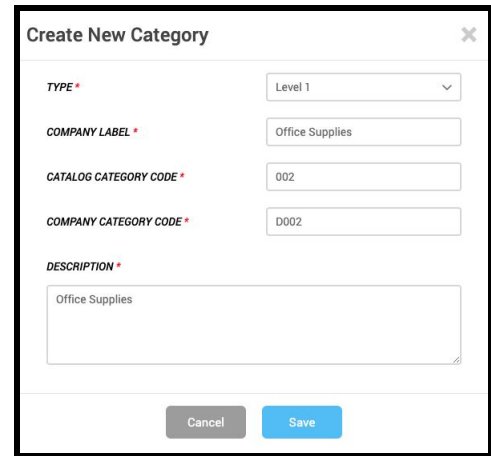
Catalog Category Code	Company Category Code	Company Label	Level 1	Level 2	Level 3	GL Code	Description	Action
004	0004	Automotive Repairs	X				Vehicle repairs including parts and labor.	
003	0003	Automotive Supplies	X				Automotive supplies, not including repairs.	
001	0001	Furniture	X				Furniture	
002	0002	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.”



The 'Create New Category' form includes the following fields:

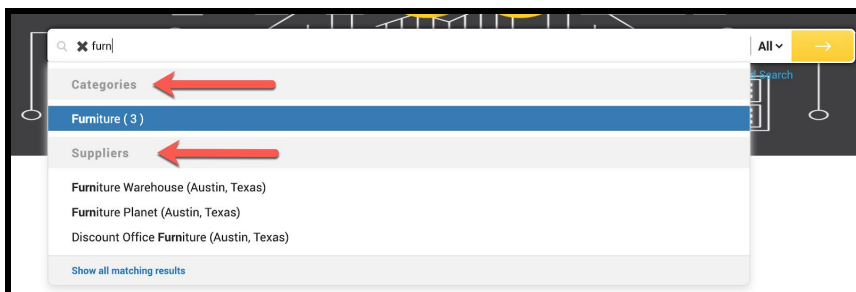
- TYPE ***: A dropdown menu currently set to 'Level 1'.
- COMPANY LABEL ***: A text input field containing 'Office Supplies'.
- CATALOG CATEGORY CODE ***: A text input field containing '002'.
- COMPANY CATEGORY CODE ***: A text input field containing 'D002'.
- DESCRIPTION ***: A larger text input area containing 'Office Supplies'.

At the bottom of the form are two buttons: 'Cancel' and 'Save'.

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)

Edit Supplier

BASIC INFO **BUSINESS INFO** CONTRACT INFO INSURANCE INFO SUPPLIER PORTAL CHANGE HISTORY

Supplier Recommendation Score: 1 ————— 10

Federal Tax Id:

Attributes: Preferred Contract

Payment Terms: **Net due on 1st day of the month - Immediate Pay**

Service Area:

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.

Edit Supplier

BASIC INFO BUSINESS INFO **CONTRACT INFO** INSURANCE INFO SUPPLIER PORTAL CHANGE HISTORY

Contract Status:

Effective Date of Agreement: 02/01/2020

Contract Expiration: 02/01/2022

Sourcing Contract:

Contract Term: **12 months**

Comments:

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.

Edit Supplier

BASIC INFO BUSINESS INFO **CONTRACT INFO**

Contract Status: **Active**

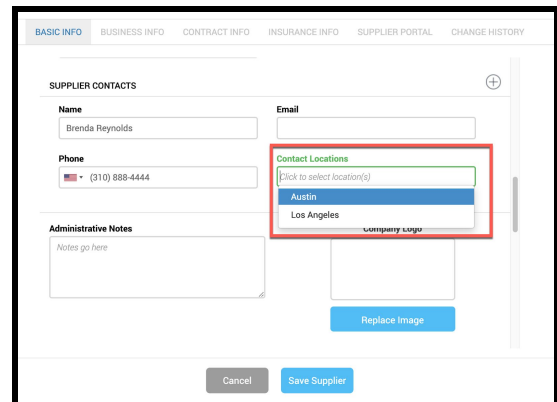
Short Term

Contract Status			
Type at least 2 characters to search			
Name	Created Date	Status	Action
<input type="checkbox"/> Active	06/30/2020	Active	
<input type="checkbox"/> Expired	06/30/2020	Inactive	
<input type="checkbox"/> On Hold	07/07/2020	Inactive	
<input type="checkbox"/> Short Term	07/07/2020	Active	
<input type="button" value="Active"/> <input type="button" value="Deactivate"/> <input type="button" value="Create A New Contract Status"/>			

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.

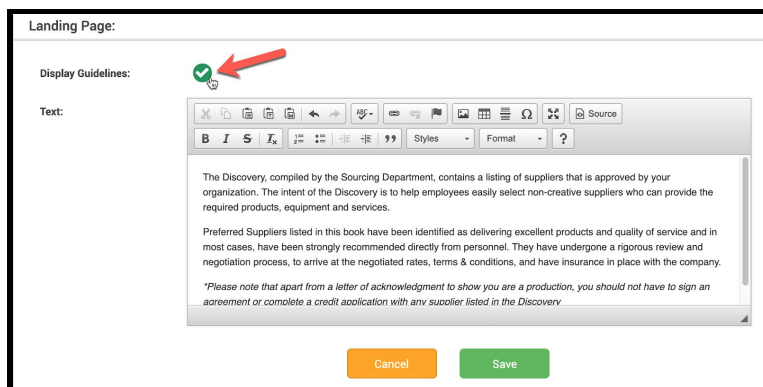


The screenshot shows the 'BASIC INFO' tab of the 'SUPPLIER CONTACTS' form. The 'Name' field contains 'Brenda Reynolds', the 'Phone' field contains '(310) 888-4444', and the 'Email' field is empty. The 'Contact Locations' dropdown menu is open, showing a list of locations: 'Austin' and 'Los Angeles'. The 'Administrative Notes' field contains the text 'Notes go here'. The 'Company Logo' field is empty. The 'Replace Image' button is visible. The 'Cancel' and 'Save Supplier' buttons are at the bottom.

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.



The screenshot shows the 'Landing Page' settings form. The 'Display Guidelines' checkbox is checked, indicated by a red arrow. The 'Text' field contains a rich text editor with the following text: 'The Discovery, compiled by the Sourcing Department, contains a listing of suppliers that is approved by your organization. The intent of the Discovery is to help employees easily select non-creative suppliers who can provide the required products, equipment and services. Preferred Suppliers listed in this book have been identified as delivering excellent products and quality of service and in most cases, have been strongly recommended directly from personnel. They have undergone a rigorous review and negotiation process, to arrive at the negotiated rates, terms & conditions, and have insurance in place with the company. *Please note that apart from a letter of acknowledgment to show you are a production, you should not have to sign an agreement or complete a credit application with any supplier listed in the Discovery.' The 'Cancel' and 'Save' buttons are at the bottom.

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.