

# TOOL USER GUIDE

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## SUPPLIER DOCUMENT MANAGER



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## 1. INITIAL SETUP OF SUPPLIER DOCUMENT MANAGER

Some initial setup you need to do before you move into building the documents

### 1.1 SETTING VISIBLE COLUMNS

Visible columns allows you to set what fields from the documents are visible in the main table that displays your document library.

**Step 1:** Select **Supplier Document Manager** from the Supplier Approval tab

The screenshot shows the 'Supplier Approval' dropdown menu. The 'Supplier Document Manager' option is highlighted with a red box. The menu also includes options like 'Customer Tools', 'Supplier Tools', 'Supplier Manager', 'Supplier Questionnaires', 'Supplier Audit Manager', 'Supplier Check Manager', 'Traceability Manager', 'Product Intake Manager', 'Risk Assessment Manager', 'Incident Manager', 'Visiting & Audit Schedule', 'Remote Audit Manager', and 'Supply Chain Manager'.

**Step 2:** Then select **Admin**

The screenshot shows the 'Supplier Document Manager' Admin page. The 'Admin' tab is highlighted with a red box. The page displays a table of documents with columns: Date, Document Name, Document Category, Version, Status, and a menu icon. The table contains six rows of documents, all with a status of 'Completed & Approved'.

Date	Document Name	Document Category	Version	Status
30/03/2020 12:17:35	Technical Conditions of supply ingredients	Technical	1	Completed & Approved
17/06/2019 12:37:29	Technical Conditions of Supply	Technical	1	Completed & Approved
04/06/2019 11:18:38	Supplier Non-Conformance Procedure	Technical	1	Completed & Approved
04/06/2019 11:16:43	Organisational Structure	Commercial	1.1	Completed & Approved
04/06/2019 10:26:32	Technical conditions of supply of Packaging	Technical	1	Completed & Approved

**Step 3:** Then select **Visible Columns** on the left. From here you can select what columns you want to show in the main table by selecting them.

Supplier Document Manager

Documents Received Documents Exceptions Sign Off Review Activity Overview Template Manager Admin

Preset Fields Select which columns you would like displayed in the main List page.

**Visible Columns**

Export To PDF

Internal Approval

Document Approvers

External Approval

Document Linked Categories

Column Name	Display in Table
Version	<input checked="" type="checkbox"/>
Status	<input checked="" type="checkbox"/>
Category	<input checked="" type="checkbox"/>

Save Settings

**Step 4:** Once done, select **Save Settings**

Supplier Document Manager

Documents Received Documents Exceptions Sign Off Review Activity Overview Template Manager Admin

Preset Fields Select which columns you would like displayed in the main List page.

**Visible Columns**

Export To PDF

Internal Approval

Document Approvers

External Approval

Document Linked Categories

Column Name	Display in Table
Version	<input checked="" type="checkbox"/>
Status	<input checked="" type="checkbox"/>
Category	<input checked="" type="checkbox"/>

Save Settings

**Step 5:** Your main table will now reflect these setting & look like this below.

Supplier Document Manager

Documents Received Documents Exceptions Sign Off Review Activity Overview Template Manager Admin

Site Created By Status Category Sort By Search

All All All All Last Updated (Desc) Search...

Filter Clear Filters

+ New Document Share with Suppliers Delete Selected View Selected Comparison Tool

25 50 100 All << first < previous next > last >>

Date	Document Name	Document Category	Version	Status
30/03/2020 12:17:35	Technical Conditions of supply ingredients	Technical	1	Completed & Approved
17/06/2019 12:37:29	Technical Conditions of Supply	Technical	1	Completed & Approved
04/06/2019 11:18:38	Supplier Non-Conformance Procedure	Technical	1	Completed & Approved
04/06/2019 11:16:43	Organisational Structure	Commercial	1.1	Completed & Approved

**Step 6:** If you want to change or edit these setting please follow the steps above.

## 1.2 INTERNAL APPROVAL

You can set the Internal Approval process here for a document that is built. So that it is approved before it can be sent to a Supplier.

### 1.2.1 VERSION INCREMENTING

Setting the increments you want to use for the versioning of the documents

**Step 1:** Staying in the **Admin** section of the Supplier Document Manager.

Supplier Document Manager

Documents Received Documents Exceptions Sign Off Review Activity Overview Template Manager **Admin**

Preset Fields

Add/Manage preset fields which can be used when creating/editing a Document Template.

Visible Columns

Export To PDF

Internal Approval

Document Approvers

External Approval

Document Linked Categories

Add New Preset Field Manage Categories

**Step 2:** Select **Internal Approval**

Supplier Document Manager

Documents Received Documents Exceptions Sign Off Review Activity Overview Template Manager Admin

Internal Approval

Version Incrementing

0.1

Approval Required

Yes

Approval Required Email Alerts

Send Immediately

Reapproval Required for any changes after a document has been approved

Yes

Approval Required By

One of the selected Users

Save Settings

**Step 3:** On **Version incrementing** input the increment value for each time you change the document. It is set as 0.1. This means if you change document 1.0 it will now become 1.1.

The screenshot shows the 'Supplier Document Manager' interface with the 'Admin' tab selected. On the left sidebar, 'Internal Approval' is highlighted. The main content area shows the 'Version Incrementing' setting with a text input field containing '0.1', which is highlighted with a red box. Other settings include 'Approval Required' (Yes), 'Approval Required Email Alerts' (Send Immediately), 'Reapproval Required for any changes after a document has been approved' (Yes), and 'Approval Required By' (One of the selected Users). A 'Save Settings' button is at the bottom right.

**Step 4:** Once done select **Save Settings**

This screenshot is identical to the previous one, but the 'Save Settings' button at the bottom right is highlighted with a red box, indicating the final step in the process.

## 1.2.2 APPROVAL REQUIRED

This setting allows you to turn on or off if approval is required for the document before you send it to suppliers.

**Step 1:** Staying in the **Admin** section of the Supplier Document Manager & in the **Internal Approval**. On **Approval Required** select **Yes or No** from the dropdown. Once done select **Save Settings**



News & Statistics

Supplier Approval

Quality Management

Trading & Planning

More

Steve

Supplier Document Manager

Documents

← Received Documents

⌚ Exceptions

✉ Sign Off Review

📊 Activity Overview

📄 Template Manager

**Admin**

Preset Fields

Visible Columns

Export To PDF

**Internal Approval**

Document Approvers

External Approval

Document Linked Categories

Everytime a new document file is uploaded or the document builder is used, you have the option to set whether it has to be approved by certain people in the company. Use the below options to tailor the approval process specifically for your own company.

Version Incrementing	0.1
Approval Required	Yes
Approval Required Email Alerts	Send Immediately
Reapproval Required for any changes after a document has been approved	Yes
Approval Required By	One of the selected Users

Save Settings

### 1.2.3 APPROVAL REQUIRED EMAIL ALERTS

This setting allows you to send an email alert to the person who is to approve the document as well as a task.

**Step 1:** Staying in the **Admin** section of the Supplier Document Manager & in the **Internal Approval** tab. From the dropdown set the email alert to **Off** or **Send Immediately**. Once done select **Save Settings**

News & Statistics

Supplier Approval

Quality Management

Trading & Planning

More

Steve

Supplier Document Manager

Documents

← Received Documents

⌚ Exceptions

✉ Sign Off Review

📊 Activity Overview

📄 Template Manager

**Admin**

Preset Fields

Visible Columns

Export To PDF

**Internal Approval**

Document Approvers

External Approval

Document Linked Categories

Everytime a new document file is uploaded or the document builder is used, you have the option to set whether it has to be approved by certain people in the company. Use the below options to tailor the approval process specifically for your own company.

Version Incrementing	0.1
Approval Required	Yes
Approval Required Email Alerts	Send Immediately
Reapproval Required for any changes after a document has been approved	Yes
Approval Required By	One of the selected Users

Save Settings

**FOODS**  
CONNECTED

Version 1.0



## 1.2.4 REAPPROVAL REQUIRED FOR ANY CHANGES AFTER A DOCUMENT HAS BEEN APPROVED

This setting allows to set if you need a document reapproved if any changes have been made.

**Step 1:** Staying in the **Admin** section of the Supplier Document Manager & in the **Internal Approval**. On **Reapproval Required for any changes after a document has been approved** select **Yes or No** from the dropdown. Once done select **Save Settings**

The screenshot shows the 'Supplier Document Manager' interface with the 'Admin' tab selected. On the left sidebar, 'Internal Approval' is highlighted. The main content area shows settings for document approval. The 'Reapproval Required for any changes after a document has been approved' dropdown is highlighted with a red box, showing 'One of the selected Users' as the selected option. A 'Save Settings' button is also highlighted with a red box.

Setting	Value
Version Incrementing	0.1
Approval Required	Yes
Approval Required Email Alerts	Send Immediately
Reapproval Required for any changes after a document has been approved	One of the selected Users
Approval Required By	One of the selected Users

Save Settings

## 1.2.5 APPROVAL REQUIRED BY

**Step 1:** Staying in the **Admin** section of the Supplier Document Manager & in the **Internal Approval**. On **Approval Required by**, select **All selected users** or **One of the selected users** from the dropdown. As you can have one or more than one person who approves. And the document might need to be approved by 2 people or more.

Once done select **Save Settings**

**Supplier Document Manager**

Documents Received Documents Exceptions Sign Off Review Activity Overview Template Manager **Admin**

**Preset Fields** Everytime a new document file is uploaded or the document builder is used, you have the option to set whether it has to be approved by certain people in the company. Use the below options to tailor the approval process specifically for your own company.

**Visible Columns**

**Export To PDF**

**Internal Approval**

**Document Approvers**

**External Approval**

**Document Linked Categories**

Version Incrementing	0.1
Approval Required	Yes
Approval Required Email Alerts	Send Immediately
Reapproval Required for any changes after a document has been approved	Yes
Approval Required By	One of the selected Users

**Save Settings**

### 1.3 DOCUMENT LINKED CATEGORIES

Before you can add an approver you need to setup document categories. Here is where you setup the categories for the documents

**Step 1:** Staying in the **Admin** section of the Supplier Document Manager, now select **Document Linked Categories**.

**Supplier Document Manager**

Documents Received Documents Exceptions Sign Off Review Activity Overview Template Manager **Admin**

**Preset Fields** Set primary and secondary document categories

**Visible Columns**

**Export To PDF**

**Internal Approval**

**Document Approvers**

**External Approval**

**Document Linked Categories**

**Save Settings**

**Step 2:** Select the edit button beside **Category Name**

**Supplier Document Manager**

Documents Received Documents Exceptions Sign Off Review Activity Overview Template Manager **Admin**

**Preset Fields** Set primary and secondary document categories

**Visible Columns**

**Export To PDF**

**Internal Approval**

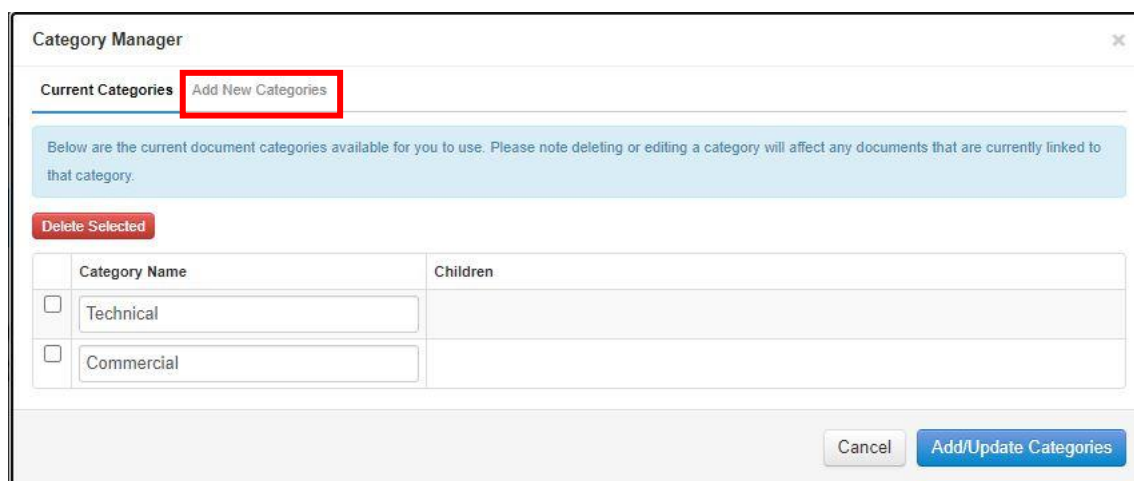
**Document Approvers**

**External Approval**

**Document Linked Categories**

**Save Settings**

### Step 3: Select **Add New Categories**



Category Manager

Current Categories **Add New Categories**

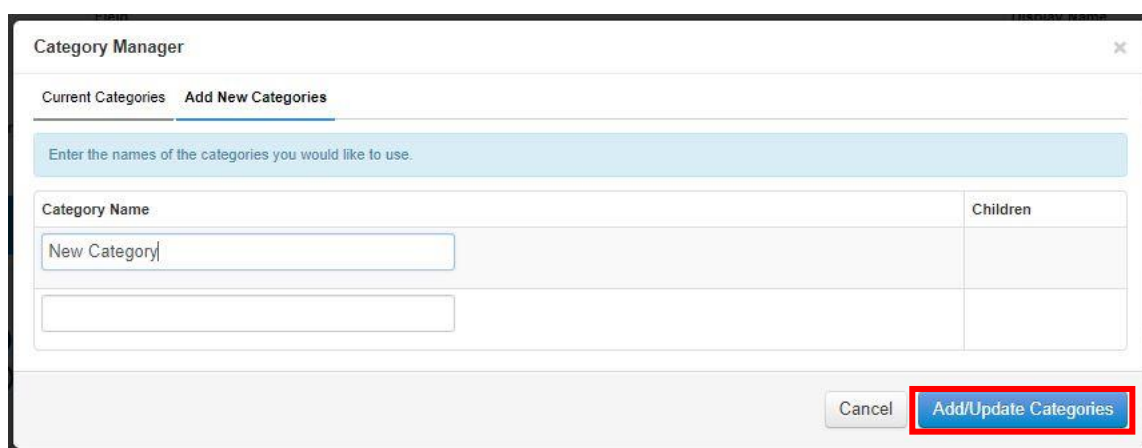
Below are the current document categories available for you to use. Please note deleting or editing a category will affect any documents that are currently linked to that category.

Delete Selected

	Category Name	Children
<input type="checkbox"/>	Technical	
<input type="checkbox"/>	Commercial	

Cancel Add/Update Categories

### Step 4: Input the categories you want to use. Once done select **Add/Update Categories**



Category Manager

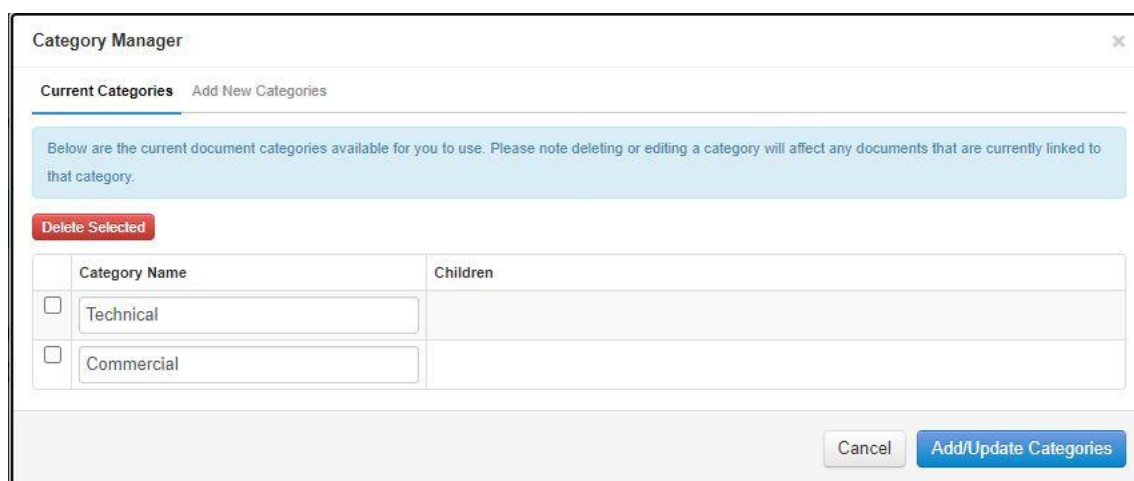
Current Categories **Add New Categories**

Enter the names of the categories you would like to use.

Category Name	Children
New Category	

Cancel **Add/Update Categories**

### Step 5: Once done your categories will look like this below



Category Manager

**Current Categories** Add New Categories

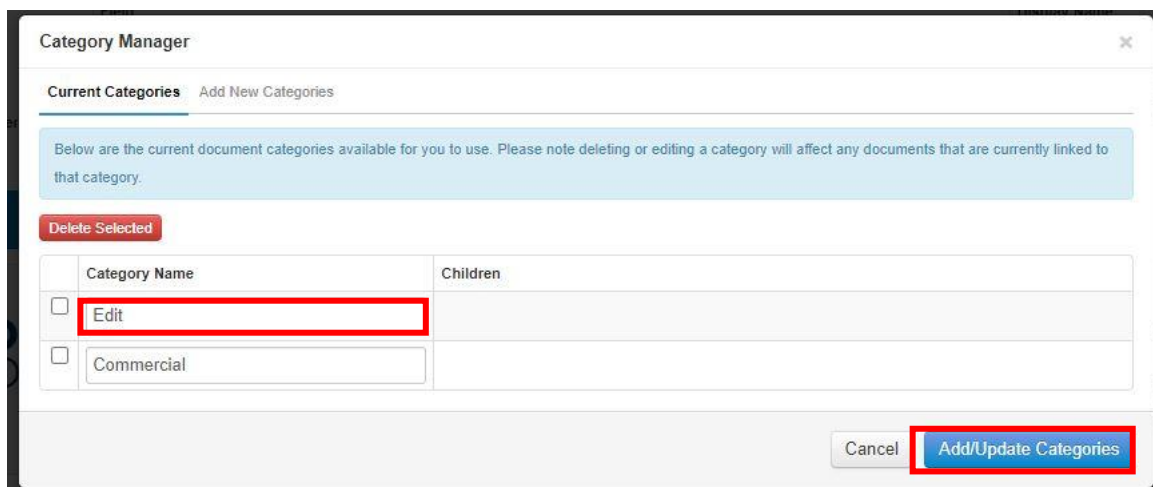
Below are the current document categories available for you to use. Please note deleting or editing a category will affect any documents that are currently linked to that category.

Delete Selected

	Category Name	Children
<input type="checkbox"/>	Technical	
<input type="checkbox"/>	Commercial	

Cancel Add/Update Categories

**Step 6:** If you need to edit simply change the text, then select **Add/Update Categories**. Once done select **Add/Update Categories**



Category Manager

Current Categories Add New Categories

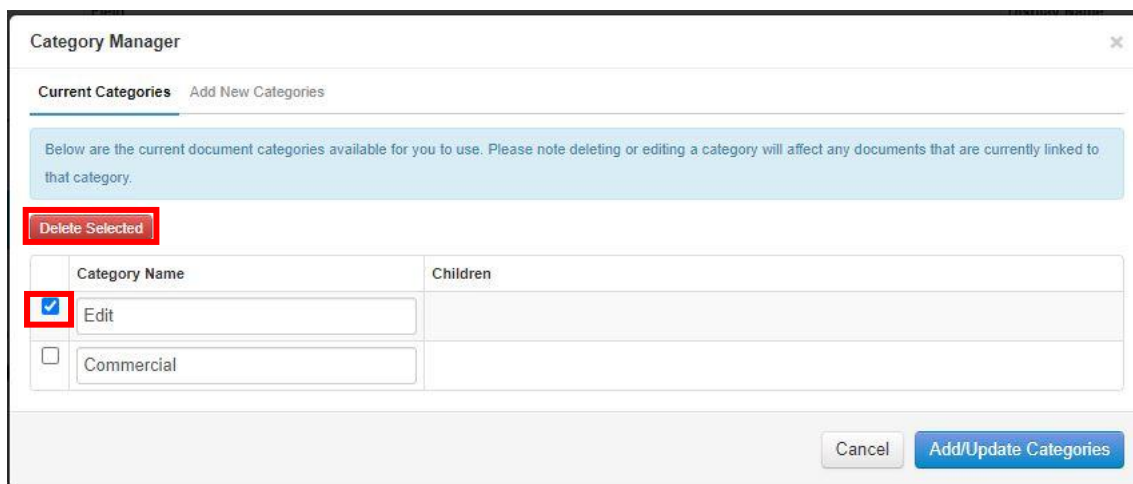
Below are the current document categories available for you to use. Please note deleting or editing a category will affect any documents that are currently linked to that category.

Delete Selected

	Category Name	Children
<input type="checkbox"/>	Edit	
<input type="checkbox"/>	Commercial	

Cancel Add/Update Categories

**Step 7:** To delete a category simply select the category, then select **Delete Selected**.



Category Manager

Current Categories Add New Categories

Below are the current document categories available for you to use. Please note deleting or editing a category will affect any documents that are currently linked to that category.

Delete Selected

	Category Name	Children
<input checked="" type="checkbox"/>	Edit	
<input type="checkbox"/>	Commercial	

Cancel Add/Update Categories

## 1.4 DOCUMENT APPROVERS

On this setting is where you actually set specific people to approve different documents depending on their categories.

**Step 1:** Staying in the **Admin** section of the Supplier Document Manager, now select **Document Approvers**

The screenshot shows the 'Supplier Document Manager' interface. The top navigation bar includes 'News & Statistics', 'Supplier Approval', 'Quality Management', 'Trading & Planning', 'More', and 'Steve'. The left sidebar has 'Preset Fields', 'Visible Columns', 'Export To PDF', 'Internal Approval', 'Document Approvers' (highlighted with a red box), 'External Approval', and 'Document Linked Categories'. The main content area shows the 'Admin' tab selected, with a sub-tab 'Add Internal Approvers' also highlighted. A table lists document approvers for various company sites and document categories.

Company Site	Document Category	Document Template	Selected Approvers
Demo Co (Group)	Technical	Glass Brittle Procedure	Steve Jones
Demo Co (Group)	Technical	Raw Material Specifications	Steve Jones
Demo Co (Group)	Technical	Supplier Audit Procedure	Steve Jones
Demo Co (Group)	Technical	Technical conditions of supply ingredients	Steve Jones
Demo Co (Group)	Technical	Technical conditions of supply meat	Steve Jones
Demo Co (Group)	Technical	Transport Food Safety Specification	Steve Jones
Demo Co (Group)	Technical	Lamb Part 1 Specification	Steve Jones
Demo Co (Group)	Technical	Pork Part 1 Specification	Steve Jones

**Step 2:** To add an approver select **Add Internal Approvers**

This screenshot is identical to the previous one, but with the 'Add Internal Approvers' button in the sub-tab area highlighted with a red box. The table below shows the current list of approvers.

Company Site	Document Category	Document Template	Selected Approvers
Demo Co (Group)	Technical	Glass Brittle Procedure	Steve Jones
Demo Co (Group)	Technical	Raw Material Specifications	Steve Jones
Demo Co (Group)	Technical	Supplier Audit Procedure	Steve Jones
Demo Co (Group)	Technical	Technical conditions of supply ingredients	Steve Jones
Demo Co (Group)	Technical	Technical conditions of supply meat	Steve Jones
Demo Co (Group)	Technical	Transport Food Safety Specification	Steve Jones
Demo Co (Group)	Technical	Lamb Part 1 Specification	Steve Jones
Demo Co (Group)	Technical	Pork Part 1 Specification	Steve Jones

**Step 3:** From the modal select the **Site** that this approver relates too. Then choose the **Document Category** that they can approve. Then choose the actual **Document Template**. Then select the **User** or **Users** as you can have one or more than one person who approves. The document might need to be approved by 2 people or more.

**Document Approvers**

Site: Factory 1

Document Category: Technical

Document Template: Glass Brittle Procedure

Users:

Search By Name...

-- Group Users --

☐ Eugene Delacroix

☒ Steve Jones

☐ Eric Knowles

☐ Tina Mead

☐ Sally Mitchell

Cancel Add Approvers

**Step 4:** Once done select **Add Approvers**

**Document Approvers**

Site: Factory 1

Document Category: Technical

Document Template: Glass Brittle Procedure

Users:

Search By Name...

-- Group Users --

☐ Eugene Delacroix

☒ Steve Jones

☐ Eric Knowles

☐ Tina Mead

☐ Sally Mitchell

Cancel Add Approvers



**Step 5:** Your approvers list will look like this below.

News & Statistics ▾ Supplier Approval ▾ Quality Management ▾ Trading & Planning ▾ More ▾ Steve ▾ ⚙

### Supplier Document Manager

Documents ← Received Documents Exceptions Sign Off Review Activity Overview Template Manager **Admin**

Preset Fields Add Document Approvers by company site, category and document template...

Visible Columns **Add Internal Approvers**

Export To PDF

Internal Approval

**Document Approvers**

External Approval

Document Linked Categories

Please Note: If you change / delete the approvers for a site, category and template then all Documents not currently at Completed & Approved will be reset back to Approval Required and the approval process will need to be restarted.

Company Site	Document Category	Document Template	Selected Approvers		
Demo Co (Group)	Technical	Glass Brittle Procedure	Steve Jones		
Demo Co (Group)	Technical	Raw Material Specifications	Steve Jones		
Demo Co (Group)	Technical	Supplier Audit Procedure	Steve Jones		
Demo Co (Group)	Technical	Technical conditions of supply ingredients	Steve Jones		
Demo Co (Group)	Technical	Technical conditions of supply meat	Steve Jones		
Demo Co (Group)	Technical	Transport Food Safety Specification	Steve Jones		
Demo Co (Group)	Technical	Lamb Part 1 Specification	Steve Jones		
Demo Co (Group)	Technical	Pork Part 1 Specification	Steve Jones		

**Step 6:** If you need to change or edit one of these approvers select the edit button beside the person.

News & Statistics ▾ Supplier Approval ▾ Quality Management ▾ Trading & Planning ▾ More ▾ Steve ▾ ⚙

### Supplier Document Manager

Documents ← Received Documents Exceptions Sign Off Review Activity Overview Template Manager **Admin**

Preset Fields Add Document Approvers by company site, category and document template...

Visible Columns **Add Internal Approvers**

Export To PDF

Internal Approval

**Document Approvers**

External Approval

Document Linked Categories

Please Note: If you change / delete the approvers for a site, category and template then all Documents not currently at Completed & Approved will be reset back to Approval Required and the approval process will need to be restarted.

Company Site	Document Category	Document Template	Selected Approvers		
Demo Co (Group)	Technical	Glass Brittle Procedure	Steve Jones		
Demo Co (Group)	Technical	Raw Material Specifications	Steve Jones		
Demo Co (Group)	Technical	Supplier Audit Procedure	Steve Jones		
Demo Co (Group)	Technical	Technical conditions of supply ingredients	Steve Jones		
Demo Co (Group)	Technical	Technical conditions of supply meat	Steve Jones		
Demo Co (Group)	Technical	Transport Food Safety Specification	Steve Jones		
Demo Co (Group)	Technical	Lamb Part 1 Specification	Steve Jones		
Demo Co (Group)	Technical	Pork Part 1 Specification	Steve Jones		



**Step 7:** Then follow the instructions in Step 3 again.

**Step 8:** If you want to delete simply select the delete button beside the setting.

**Supplier Document Manager**

Documents Received Documents Exceptions Sign Off Review Activity Overview Template Manager **Admin**

Preset Fields: Add Document Approvers by company site, category and document template...

Visible Columns: [Add Internal Approvers](#)

Export To PDF

Internal Approval

**Document Approvers**

External Approval

Document Linked Categories

Please Note: If you change / delete the approvers for a site, category and template then all Documents not currently at Completed & Approved will be reset back to Approval Required and the approval process will need to be restarted.

Company Site	Document Category	Document Template	Selected Approvers		
Demo Co (Group)	Technical	Glass Brittle Procedure	Steve Jones		
Demo Co (Group)	Technical	Raw Material Specifications	Steve Jones		
Demo Co (Group)	Technical	Supplier Audit Procedure	Steve Jones		
Demo Co (Group)	Technical	Technical conditions of supply ingredients	Steve Jones		
Demo Co (Group)	Technical	Technical conditions of supply meat	Steve Jones		
Demo Co (Group)	Technical	Transport Food Safety Specification	Steve Jones		
Demo Co (Group)	Technical	Lamb Part 1 Specification	Steve Jones		
Demo Co (Group)	Technical	Pork Part 1 Specification	Steve Jones		

## 1.5 EXTERNAL APPROVAL

On this setting you can input a declaration that the suppliers are signing off on.

**Step 1:** Staying in the **Admin** section of the Supplier Document Manager, now select **External Approval**. In the 2 boxes enter on your declarations if you want to use them.

**Supplier Document Manager**

Documents Received Documents Exceptions Sign Off Review Activity Overview Template Manager **Admin**

Preset Fields: Update supplier sign off declarations...

Visible Columns

Export To PDF

Internal Approval

Document Approvers

**External Approval**

Document Linked Categories

Supplier Sign Off Declaration (1000 character limit)

Customer Sign Off Declaration (1000 character limit)

By signing off on this document you agreed that....

By signing off on this document you agreed to the above documents contents and the clauses and guides within.

[Save Settings](#)

## Step 2: Once done select **Save Settings**

**Supplier Document Manager**

Documents Received Documents Exceptions Sign Off Review Activity Overview Template Manager Admin

Preset Fields: Update supplier sign off declarations...

Visible Columns:

Export To PDF:

Internal Approval:

Document Approvers:

External Approval (highlighted):

Document Linked Categories:

Supplier Sign Off Declaration (1000 character limit): By signing off on this document you agreed that....

Customer Sign Off Declaration (1000 character limit): By signing off on this document you agreed to the above documents contents and the clauses and guides within.

**Save Settings** (highlighted)

## 2. CREATING A SUPPLIER DOCUMENT TEMPLATE

First you need to create a blank template in order to hold the information in the document. After you do that you can then copy the information for your document into the template.

### 2.1 CREATING THE DOCUMENT TEMPLATE

#### Step 1: Select **Template Manager**

**Supplier Document Manager**

Documents Received Documents Exceptions Sign Off Review Activity Overview **Template Manager** Admin

+ Add Form Template - Delist Selected + Activate Selected Duplicate Template

<input type="checkbox"/>	Last Updated	Template Name	Created By	Status	
<input type="checkbox"/>	03/04/2019 10:56:22		Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	20/11/2018 12:38:07	Glass Brittle Procedure	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	20/11/2018 12:47:20	Lamb Part 1 Specification	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	20/11/2018 12:44:02	Pork Part 1 Specification	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	13/11/2018 09:37:59	Raw Material Specifications	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	03/12/2018 12:15:36	Raw Material Specifications - (SITE 2 ONLY)	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	03/12/2018 12:14:03	Raw Material Specifications - (SITE 3 ONLY)	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	20/11/2018 12:41:40	Supplier Audit Procedure	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	04/06/2019 10:13:39	Supplier Non-Conformance Procedure	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	13/11/2018 09:31:08	Technical conditions of supply ingredients	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	03/12/2018 12:13:23	Technical conditions of supply ingredients - (SITE 3 ONLY)	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	13/11/2018 09:29:11	Technical conditions of supply meat	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	20/11/2018 12:53:19	Transport Food Safety Specification	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	07/03/2019 14:31:58		Steve Jones	Inactive	Preview Update Edit History Settings

## Step 2: Select *Add Form Template*

Supplier Document Manager

Documents Received Documents Exceptions Sign Off Review Activity Overview **Template Manager** Admin

**Add Form Template** Delist Selected Activate Selected Duplicate Template

Last Updated	Template Name	Created By	Status	
03/04/2019 10:56:22		Steve Jones	Active	Preview Update Edit History Settings
20/11/2018 12:38:07	Glass Brittle Procedure	Steve Jones	Active	Preview Update Edit History Settings

## Step 3: Input the template name then select *Save Title*

Supplier Document Manager - Create Form

Template Name: New template **Save Title**

Edit Options: Add New Section

Form Preview: You have not added any elements to your form yet. To get started, click 'Add New Section'.

## Step 4: Now select *Add New Section*

Supplier Document Manager - Create Form

Template Name: New template **Save Title**

Edit Options: **Add New Section**

Form Preview: You have not added any elements to your form yet. To get started, click 'Add New Section'.

## Step 5: Enter in the section name select *Add Section* when done

Add New Section

Section Name: Part 1

Page Break After: No

Expand / Collapse: No

Intro Text (Optional): Instructions regarding completing section

Quick Add Section Fields

Label	Type	Hide Label
	-- Please Select --	Q Preset Browser
	-- Please Select --	Q Preset Browser
	-- Please Select --	Q Preset Browser
	-- Please Select --	Q Preset Browser

Cancel **Add Section**

**Step 6:** The new section will look like this below

The screenshot shows the 'Supplier Document Manager - Update Form' interface. At the top, there's a navigation bar with links: News & Statistics, Supplier Approval, Quality Management, Trading & Planning, More, and Steve. Below the navigation bar, the title 'Supplier Document Manager - Update Form' is displayed with a 'Back' button. The 'Template Name' field contains 'New Template' and a 'Save Title' button. To the right, 'Edit Options' include 'Add New' and 'Reorder'. The 'Form Preview' section shows a single section labeled 'Part 1' with a plus icon and a refresh icon.

**Step 7:** To add a new field or clause where text can be entered in at the building document stage select **Add New – Standard Field**

This screenshot is similar to the previous one, but the 'Add New' dropdown menu is open. The menu options are 'Section', 'Standard Field' (highlighted with a red box), and 'Preset Field'. The 'Standard Field' option is the one to be selected according to the instructions.

**Step 8:** Enter in the **Field Label** name, choose what **Section** it belongs too, then choose the **Field Type** this relates to what way you want to enter the document text. Usually Multiple Line text allowing you to add lines & lines of text. Add any help text if necessary, to help guide your suppliers on the point.

The 'Add New Field' dialog box is shown. It contains the following fields:
 

- Field Label:** 'Clause 1.1' with a 'Show' button.
- Section:** A dropdown menu currently set to 'Part 1'.
- Field Type:** A dropdown menu set to 'Textarea - Multiple Line text'.
- Help Text:** A text area containing 'Help text goes here |'.
- Help Image:** A 'Choose file' button and the text 'No file chosen'.

 At the bottom right, there are 'Cancel' and 'Add Field' buttons.

**Step 9:** Once done select **Add Field**

**Add New Field**

Field Label: Clause 1.1 Show

Section: Part 1

Field Type: Textarea - Multiple Line text Q Preset Browser

Help Text: Help text goes here

Help Image: Choose file No file chosen

Cancel Add Field

**Step 10:** Your field will now look like this below.

News & Statistics Supplier Approval Quality Management Trading & Planning More Steve

**Supplier Document Manager - Update Form** Back

Template Name: New Template Save Title

Edit Options: Add New Reorder


**Form Preview**

Part 1

Clause 1.1

**Step 11:** Repeat steps to build up your Document Template until it looks something like this below.

**Glass Brittle Procedure - Preview**



**Scope**

S1

**Responsibilities**

Frequency

☐ Daily  
☐ Monthly  
☐ Weekly  
☐ As required  
☐ At all times

Record No/Name

☐ QC09  
☐ QC66  
☐ Glass/Hard plastic breakage/Allergen/Spillage form  
☐ QC15  
☐ RA15  
☐ N/A  
☐ QC65

Responsibility

☐ All staff  
☐ Engineers  
☐ Departmental supervisors  
☐ Quality assurance  
☐ Hygiene  
☐ Managers

RS1

RS2



## 2.2 EDIT TEMPLATE CONTENT

### Step 1: Go to the *Template Manager*

News & Statistics ▾ Supplier Approval ▾ Quality Management ▾ Trading & Planning ▾ More ▾ Steve ▾

**Supplier Document Manager**

Documents ← Received Documents Exceptions Sign Off Review Activity Overview **Template Manager** Admin

+ Add Form Template - Delist Selected + Activate Selected Duplicate Template

<input type="checkbox"/>	Last Updated	Template Name	Created By	Status				
<input type="checkbox"/>	03/04/2019 10:56:22		Steve Jones	Active	Preview	Update	Edit History	Settings
<input type="checkbox"/>	20/11/2018 12:38:07	Glass Brittle Procedure	Steve Jones	Active	Preview	Update	Edit History	Settings
<input type="checkbox"/>	20/11/2018 12:47:20	Lamb Part 1 Specification	Steve Jones	Active	Preview	Update	Edit History	Settings
<input type="checkbox"/>	20/11/2018 12:44:02	Pork Part 1 Specification	Steve Jones	Active	Preview	Update	Edit History	Settings
<input type="checkbox"/>	13/11/2018 09:37:59	Raw Material Specifications	Steve Jones	Active	Preview	Update	Edit History	Settings
<input type="checkbox"/>	03/12/2018 12:15:36	Raw Material Specifications - (SITE 2 ONLY)	Steve Jones	Active	Preview	Update	Edit History	Settings
<input type="checkbox"/>	03/12/2018 12:14:03	Raw Material Specifications - (SITE 3 ONLY)	Steve Jones	Active	Preview	Update	Edit History	Settings
<input type="checkbox"/>	20/11/2018 12:41:40	Supplier Audit Procedure	Steve Jones	Active	Preview	Update	Edit History	Settings
<input type="checkbox"/>	04/06/2019 10:13:39	Supplier Non-Conformance Procedure	Steve Jones	Active	Preview	Update	Edit History	Settings
<input type="checkbox"/>	13/11/2018 09:31:08	Technical conditions of supply ingredients	Steve Jones	Active	Preview	Update	Edit History	Settings
<input type="checkbox"/>	03/12/2018 12:13:23	Technical conditions of supply ingredients - (SITE 3 ONLY)	Steve Jones	Active	Preview	Update	Edit History	Settings
<input type="checkbox"/>	13/11/2018 09:29:11	Technical conditions of supply meat	Steve Jones	Active	Preview	Update	Edit History	Settings
<input type="checkbox"/>	20/11/2018 12:53:19	Transport Food Safety Specification	Steve Jones	Active	Preview	Update	Edit History	Settings
<input type="checkbox"/>	07/03/2019 14:31:58		Steve Jones	Inactive	Preview	Update	Edit History	Settings

### Step 2: Select *Update* to edit the template you want to change

News & Statistics ▾ Supplier Approval ▾ Quality Management ▾ Trading & Planning ▾ More ▾ Steve ▾

**Supplier Document Manager**

Documents ← Received Documents Exceptions Sign Off Review Activity Overview **Template Manager** Admin

+ Add Form Template - Delist Selected + Activate Selected Duplicate Template

<input type="checkbox"/>	Last Updated	Template Name	Created By	Status				
<input type="checkbox"/>	03/04/2019 10:56:22		Steve Jones	Active	Preview	Update	Edit History	Settings
<input type="checkbox"/>	20/11/2018 12:38:07	Glass Brittle Procedure	Steve Jones	Active	Preview	Update	Edit History	Settings
<input type="checkbox"/>	20/11/2018 12:47:20	Lamb Part 1 Specification	Steve Jones	Active	Preview	Update	Edit History	Settings
<input type="checkbox"/>	20/11/2018 12:44:02	Pork Part 1 Specification	Steve Jones	Active	Preview	Update	Edit History	Settings
<input type="checkbox"/>	13/11/2018 09:37:59	Raw Material Specifications	Steve Jones	Active	Preview	Update	Edit History	Settings
<input type="checkbox"/>	03/12/2018 12:15:36	Raw Material Specifications - (SITE 2 ONLY)	Steve Jones	Active	Preview	Update	Edit History	Settings
<input type="checkbox"/>	03/12/2018 12:14:03	Raw Material Specifications - (SITE 3 ONLY)	Steve Jones	Active	Preview	Update	Edit History	Settings
<input type="checkbox"/>	20/11/2018 12:41:40	Supplier Audit Procedure	Steve Jones	Active	Preview	Update	Edit History	Settings
<input type="checkbox"/>	04/06/2019 10:13:39	Supplier Non-Conformance Procedure	Steve Jones	Active	Preview	Update	Edit History	Settings
<input type="checkbox"/>	13/11/2018 09:31:08	Technical conditions of supply ingredients	Steve Jones	Active	Preview	Update	Edit History	Settings
<input type="checkbox"/>	03/12/2018 12:13:23	Technical conditions of supply ingredients - (SITE 3 ONLY)	Steve Jones	Active	Preview	Update	Edit History	Settings
<input type="checkbox"/>	13/11/2018 09:29:11	Technical conditions of supply meat	Steve Jones	Active	Preview	Update	Edit History	Settings
<input type="checkbox"/>	20/11/2018 12:53:19	Transport Food Safety Specification	Steve Jones	Active	Preview	Update	Edit History	Settings
<input type="checkbox"/>	07/03/2019 14:31:58		Steve Jones	Inactive	Preview	Update	Edit History	Settings

### Step 3: Then follow the same steps as creating a template to edi



## 2.3 EDIT TEMPLATE SETTINGS

To edit the template settings & setup follow these steps.

**Step 1:** In Template Manager, select *Edit Settings*

News & Statistics ▾ Supplier Approval ▾ Quality Management ▾ Trading & Planning ▾ More ▾ Steve ▾ ⚙

**Supplier Document Manager**

Documents ← Received Documents Exceptions Sign Off Review Activity Overview **Template Manager** Admin

[Add Form Template](#)
[Delete Selected](#)
[Activate Selected](#)
[Duplicate Template](#)

<input type="checkbox"/>	Last Updated	Template Name	Created By	Status	
<input type="checkbox"/>	03/04/2019 10:56:22		Steve Jones	Active	Preview Update Edit History <b>Settings</b>
<input type="checkbox"/>	20/11/2018 12:38:07	Glass Brittle Procedure	Steve Jones	Active	Preview Update Edit History <b>Settings</b>
<input type="checkbox"/>	20/11/2018 12:47:20	Lamb Part 1 Specification	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	20/11/2018 12:44:02	Pork Part 1 Specification	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	13/11/2018 09:37:59	Raw Material Specifications	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	03/12/2018 12:15:36	Raw Material Specifications - (SITE 2 ONLY)	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	03/12/2018 12:14:03	Raw Material Specifications - (SITE 3 ONLY)	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	20/11/2018 12:41:40	Supplier Audit Procedure	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	04/06/2019 10:13:39	Supplier Non-Conformance Procedure	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	13/11/2018 09:31:08	Technical conditions of supply ingredients	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	03/12/2018 12:13:23	Technical conditions of supply ingredients - (SITE 3 ONLY)	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	13/11/2018 09:29:11	Technical conditions of supply meat	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	20/11/2018 12:53:19	Transport Food Safety Specification	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	07/03/2019 14:31:58		Steve Jones	Inactive	Preview Update Edit History Settings

**Step 2:** Here you can edit the settings that you setup when you created the template. You can edit the **Sites** by selecting or deselecting. Choose the **Declarations** or set template specific ones.

Glass Brittle Procedure - Template Settings

Select Sites

☒ Demo Co (Group)
☐ Factory 2
  
☐ Factory 1
☐ Factory 3

Sign Off Declarations

Use Company Default

Click here to modify default sign off declarations

Supplier Sign Off Declaration  
(1000 character limit)

Enter a supplier sign off declaration...

Customer Sign Off Declaration  
(1000 character limit)

Enter a customer sign off declaration...

Custom Sign Off Fields

No

Sign Off Comments Require Approval

No

Cancel
Save

**Step 3:** Choose to use **Custom Sign Off Fields**. If you select yes, further options will appear for you to use for your supplier to sign off on. And on **Sign Off Comments Require Approval** you can choose here if any comments that have been added by the supplier on sign off they need approved or not. By selecting yes or no.

New Template - Template Settings

Customer Sign Off Declaration  
(1000 character limit)

Enter a customer sign off declaration...

Custom Sign Off Fields

Yes

Custom Sign Off Field 1  
(Optional)

By signing this you agree to

Custom Sign Off Field 2  
(Optional)

Enter a description of the custom sign off field...

Custom Sign Off Field 3  
(Optional)

Enter a description of the custom sign off field...

Sign Off Comments Require Approval

Yes

*!* If enabled, comments added by the supplier when signing off a document must be reviewed by your company.

Cancel

Save

**Step 4:** Once done select **Save**

New Template - Template Settings

Customer Sign Off Declaration  
(1000 character limit)

Enter a customer sign off declaration...

Custom Sign Off Fields

Yes

Custom Sign Off Field 1  
(Optional)

By signing this you agree to

Custom Sign Off Field 2  
(Optional)

Enter a description of the custom sign off field...

Custom Sign Off Field 3  
(Optional)

Enter a description of the custom sign off field...

Sign Off Comments Require Approval

Yes

If enabled, comments added by the supplier when signing off a document must be reviewed by your company.

Cancel

Save

## 2.4 DELIST A TEMPLATE

If you want to delist a template as it no longer is used or viable for low these steps

### Step 1: Go to the *Template Manager*

The screenshot shows the 'Supplier Document Manager' interface. The top navigation bar includes 'News & Statistics', 'Supplier Approval', 'Quality Management', 'Trading & Planning', 'More', and 'Steve'. Below this, the 'Supplier Document Manager' header is visible. The 'Template Manager' tab is highlighted with a red box. Below the header, there are buttons: 'Add Form Template', 'Delist Selected' (highlighted with a red box), 'Activate Selected', and 'Duplicate Template'. The main table lists templates with columns: 'Last Updated', 'Template Name', 'Created By', 'Status', and a set of action buttons (Preview, Update, Edit History, Settings). The first row shows a template with 'Last Updated' 03/04/2019 10:56:22, 'Template Name' blank, 'Created By' Steve Jones, and 'Status' Active.

Last Updated	Template Name	Created By	Status	Preview	Update	Edit History	Settings
03/04/2019 10:56:22		Steve Jones	Active	Preview	Update	Edit History	Settings
20/11/2018 12:38:07	Glass Brittle Procedure	Steve Jones	Active	Preview	Update	Edit History	Settings
20/11/2018 12:47:20	Lamb Part 1 Specification	Steve Jones	Active	Preview	Update	Edit History	Settings
20/11/2018 12:44:02	Pork Part 1 Specification	Steve Jones	Active	Preview	Update	Edit History	Settings
13/11/2018 09:37:59	Raw Material Specifications	Steve Jones	Active	Preview	Update	Edit History	Settings
03/12/2018 12:15:36	Raw Material Specifications - (SITE 2 ONLY)	Steve Jones	Active	Preview	Update	Edit History	Settings
03/12/2018 12:14:03	Raw Material Specifications - (SITE 3 ONLY)	Steve Jones	Active	Preview	Update	Edit History	Settings
20/11/2018 12:41:40	Supplier Audit Procedure	Steve Jones	Active	Preview	Update	Edit History	Settings
04/06/2019 10:13:39	Supplier Non-Conformance Procedure	Steve Jones	Active	Preview	Update	Edit History	Settings
13/11/2018 09:31:08	Technical conditions of supply ingredients	Steve Jones	Active	Preview	Update	Edit History	Settings
03/12/2018 12:13:23	Technical conditions of supply ingredients - (SITE 3 ONLY)	Steve Jones	Active	Preview	Update	Edit History	Settings
13/11/2018 09:29:11	Technical conditions of supply meat	Steve Jones	Active	Preview	Update	Edit History	Settings
20/11/2018 12:53:19	Transport Food Safety Specification	Steve Jones	Active	Preview	Update	Edit History	Settings
07/03/2019 14:31:58		Steve Jones	Inactive	Preview	Update	Edit History	Settings


### Step 2: Select the template you want to delist then select *Delist Selected*

The screenshot shows the 'Supplier Document Manager' interface. The 'Delist Selected' button is highlighted with a red box. The first row of the table is also selected, indicated by a blue checkmark in the checkbox column. The table structure is the same as in the previous screenshot.

Last Updated	Template Name	Created By	Status	Preview	Update	Edit History	Settings
03/04/2019 10:56:22		Steve Jones	Active	Preview	Update	Edit History	Settings
20/11/2018 12:38:07	Glass Brittle Procedure	Steve Jones	Active	Preview	Update	Edit History	Settings
20/11/2018 12:47:20	Lamb Part 1 Specification	Steve Jones	Active	Preview	Update	Edit History	Settings
06/07/2020 13:33:44	New Template	Steve Jones	Active	Preview	Update	Edit History	Settings
20/11/2018 12:44:02	Pork Part 1 Specification	Steve Jones	Active	Preview	Update	Edit History	Settings
13/11/2018 09:37:59	Raw Material Specifications	Steve Jones	Active	Preview	Update	Edit History	Settings
03/12/2018 12:15:36	Raw Material Specifications - (SITE 2 ONLY)	Steve Jones	Active	Preview	Update	Edit History	Settings
03/12/2018 12:14:03	Raw Material Specifications - (SITE 3 ONLY)	Steve Jones	Active	Preview	Update	Edit History	Settings
20/11/2018 12:41:40	Supplier Audit Procedure	Steve Jones	Active	Preview	Update	Edit History	Settings
04/06/2019 10:13:39	Supplier Non-Conformance Procedure	Steve Jones	Active	Preview	Update	Edit History	Settings
13/11/2018 09:31:08	Technical conditions of supply ingredients	Steve Jones	Active	Preview	Update	Edit History	Settings
03/12/2018 12:13:23	Technical conditions of supply ingredients - (SITE 3 ONLY)	Steve Jones	Active	Preview	Update	Edit History	Settings
13/11/2018 09:29:11	Technical conditions of supply meat	Steve Jones	Active	Preview	Update	Edit History	Settings
20/11/2018 12:53:19	Transport Food Safety Specification	Steve Jones	Active	Preview	Update	Edit History	Settings
07/03/2019 14:31:58		Steve Jones	Inactive	Preview	Update	Edit History	Settings

Step 3: The status will revert to Inactive & you will see this message in green.



News & Statistics ▾ Supplier Approval ▾ Quality Management ▾ Trading & Planning ▾ More ▾ Steve ▾ 

### Supplier Document Manager

Documents ← Received Documents Exceptions Sign Off Review Activity Overview **Template Manager** Admin

Selected templates have been successfully set to Inactive.

[Add Form Template](#) [Delist Selected](#) [Activate Selected](#) [Duplicate Template](#)

<input type="checkbox"/>	Last Updated	Template Name	Created By	Status	
<input type="checkbox"/>	20/11/2018 12:38:07	Glass Brittle Procedure	Steve Jones	Active	<a href="#">Preview</a> <a href="#">Update</a> <a href="#">Edit History</a> <a href="#">Settings</a>
<input type="checkbox"/>	20/11/2018 12:47:20	Lamb Part 1 Specification	Steve Jones	Active	<a href="#">Preview</a> <a href="#">Update</a> <a href="#">Edit History</a> <a href="#">Settings</a>
<input type="checkbox"/>	06/07/2020 13:33:44	New Template	Steve Jones	Active	<a href="#">Preview</a> <a href="#">Update</a> <a href="#">Edit History</a> <a href="#">Settings</a>
<input type="checkbox"/>	20/11/2018 12:44:02	Pork Part 1 Specification	Steve Jones	Active	<a href="#">Preview</a> <a href="#">Update</a> <a href="#">Edit History</a> <a href="#">Settings</a>
<input type="checkbox"/>	13/11/2018 09:37:59	Raw Material Specifications	Steve Jones	Active	<a href="#">Preview</a> <a href="#">Update</a> <a href="#">Edit History</a> <a href="#">Settings</a>
<input type="checkbox"/>	03/12/2018 12:15:36	Raw Material Specifications - (SITE 2 ONLY)	Steve Jones	Active	<a href="#">Preview</a> <a href="#">Update</a> <a href="#">Edit History</a> <a href="#">Settings</a>
<input type="checkbox"/>	03/12/2018 12:14:03	Raw Material Specifications - (SITE 3 ONLY)	Steve Jones	Active	<a href="#">Preview</a> <a href="#">Update</a> <a href="#">Edit History</a> <a href="#">Settings</a>
<input type="checkbox"/>	20/11/2018 12:41:40	Supplier Audit Procedure	Steve Jones	Active	<a href="#">Preview</a> <a href="#">Update</a> <a href="#">Edit History</a> <a href="#">Settings</a>
<input type="checkbox"/>	04/06/2019 10:13:39	Supplier Non-Conformance Procedure	Steve Jones	Active	<a href="#">Preview</a> <a href="#">Update</a> <a href="#">Edit History</a> <a href="#">Settings</a>
<input type="checkbox"/>	13/11/2018 09:31:08	Technical conditions of supply ingredients	Steve Jones	Active	<a href="#">Preview</a> <a href="#">Update</a> <a href="#">Edit History</a> <a href="#">Settings</a>
<input type="checkbox"/>	03/12/2018 12:13:23	Technical conditions of supply ingredients - (SITE 3 ONLY)	Steve Jones	Active	<a href="#">Preview</a> <a href="#">Update</a> <a href="#">Edit History</a> <a href="#">Settings</a>
<input type="checkbox"/>	13/11/2018 09:29:11	Technical conditions of supply meat	Steve Jones	Active	<a href="#">Preview</a> <a href="#">Update</a> <a href="#">Edit History</a> <a href="#">Settings</a>
<input type="checkbox"/>	20/11/2018 12:53:19	Transport Food Safety Specification	Steve Jones	Active	<a href="#">Preview</a> <a href="#">Update</a> <a href="#">Edit History</a> <a href="#">Settings</a>
<input type="checkbox"/>	07/03/2019 14:31:58		Steve Jones	Inactive	<a href="#">Preview</a> <a href="#">Update</a> <a href="#">Edit History</a> <a href="#">Settings</a>

## 2.5 ACTIVATE SELECTED

This setting allows you to set a template to Active so it can be used to build documents. You must have an active template before you can build a document to that template. To activate or re activate delisted templates follow these steps below.

### Step 1: Select the template to activate

Supplier Document Manager

Documents ← Received Documents Exceptions Sign Off Review Activity Overview **Template Manager** Admin

Selected templates have been successfully set to Inactive.

[Add Form Template](#) [Delist Selected](#) [Activate Selected](#) [Duplicate Template](#)

<input type="checkbox"/>	Last Updated	Template Name	Created By	Status	
<input type="checkbox"/>	20/11/2018 12:38:07	Glass Brittle Procedure	Steve Jones	Active	<a href="#">Preview</a> <a href="#">Update</a> <a href="#">Edit History</a> <a href="#">Settings</a>
<input type="checkbox"/>	20/11/2018 12:47:20	Lamb Part 1 Specification	Steve Jones	Active	<a href="#">Preview</a> <a href="#">Update</a> <a href="#">Edit History</a> <a href="#">Settings</a>
<input type="checkbox"/>	06/07/2020 13:33:44	New Template	Steve Jones	Active	<a href="#">Preview</a> <a href="#">Update</a> <a href="#">Edit History</a> <a href="#">Settings</a>
<input type="checkbox"/>	20/11/2018 12:44:02	Pork Part 1 Specification	Steve Jones	Active	<a href="#">Preview</a> <a href="#">Update</a> <a href="#">Edit History</a> <a href="#">Settings</a>
<input type="checkbox"/>	13/11/2018 09:37:59	Raw Material Specifications	Steve Jones	Active	<a href="#">Preview</a> <a href="#">Update</a> <a href="#">Edit History</a> <a href="#">Settings</a>
<input type="checkbox"/>	03/12/2018 12:15:36	Raw Material Specifications - (SITE 2 ONLY)	Steve Jones	Active	<a href="#">Preview</a> <a href="#">Update</a> <a href="#">Edit History</a> <a href="#">Settings</a>
<input type="checkbox"/>	03/12/2018 12:14:03	Raw Material Specifications - (SITE 3 ONLY)	Steve Jones	Active	<a href="#">Preview</a> <a href="#">Update</a> <a href="#">Edit History</a> <a href="#">Settings</a>
<input type="checkbox"/>	20/11/2018 12:41:40	Supplier Audit Procedure	Steve Jones	Active	<a href="#">Preview</a> <a href="#">Update</a> <a href="#">Edit History</a> <a href="#">Settings</a>
<input type="checkbox"/>	04/06/2019 10:13:39	Supplier Non-Conformance Procedure	Steve Jones	Active	<a href="#">Preview</a> <a href="#">Update</a> <a href="#">Edit History</a> <a href="#">Settings</a>
<input type="checkbox"/>	13/11/2018 09:31:08	Technical conditions of supply ingredients	Steve Jones	Active	<a href="#">Preview</a> <a href="#">Update</a> <a href="#">Edit History</a> <a href="#">Settings</a>
<input type="checkbox"/>	03/12/2018 12:13:23	Technical conditions of supply ingredients - (SITE 3 ONLY)	Steve Jones	Active	<a href="#">Preview</a> <a href="#">Update</a> <a href="#">Edit History</a> <a href="#">Settings</a>
<input type="checkbox"/>	13/11/2018 09:29:11	Technical conditions of supply meat	Steve Jones	Active	<a href="#">Preview</a> <a href="#">Update</a> <a href="#">Edit History</a> <a href="#">Settings</a>
<input type="checkbox"/>	20/11/2018 12:53:19	Transport Food Safety Specification	Steve Jones	Active	<a href="#">Preview</a> <a href="#">Update</a> <a href="#">Edit History</a> <a href="#">Settings</a>
<input checked="" type="checkbox"/>	07/03/2019 14:31:58		Steve Jones	Inactive	<a href="#">Preview</a> <a href="#">Update</a> <a href="#">Edit History</a> <a href="#">Settings</a>
<input type="checkbox"/>	03/04/2019 10:56:22		Steve Jones	Inactive	<a href="#">Preview</a> <a href="#">Update</a> <a href="#">Edit History</a> <a href="#">Settings</a>

## Step 2: Then select **Activate Selected**

### Supplier Document Manager

Documents Received Documents Exceptions Sign Off Review Activity Overview **Template Manager** Admin

Selected templates have been successfully set to Inactive.

[Add Form Template](#) [Delete Selected](#) [Activate Selected](#) [Duplicate Template](#)

<input type="checkbox"/>	Last Updated	Template Name	Created By	Status	
<input type="checkbox"/>	20/11/2018 12:38:07	Glass Brittle Procedure	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	20/11/2018 12:47:20	Lamb Part 1 Specification	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	06/07/2020 13:33:44	New Template	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	20/11/2018 12:44:02	Pork Part 1 Specification	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	13/11/2018 09:37:59	Raw Material Specifications	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	03/12/2018 12:15:36	Raw Material Specifications - (SITE 2 ONLY)	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	03/12/2018 12:14:03	Raw Material Specifications - (SITE 3 ONLY)	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	20/11/2018 12:41:40	Supplier Audit Procedure	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	04/06/2019 10:13:39	Supplier Non-Conformance Procedure	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	13/11/2018 09:31:08	Technical conditions of supply ingredients	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	03/12/2018 12:13:23	Technical conditions of supply ingredients - (SITE 3 ONLY)	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	13/11/2018 09:29:11	Technical conditions of supply meat	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	20/11/2018 12:53:19	Transport Food Safety Specification	Steve Jones	Active	Preview Update Edit History Settings
<input checked="" type="checkbox"/>	07/03/2019 14:31:58		Steve Jones	Inactive	Preview Update Edit History Settings
<input type="checkbox"/>	03/04/2019 10:56:22		Steve Jones	Inactive	Preview Update Edit History Settings

**Step 3:** The status of that template will now revert to Active.

## 2.6 EDITS HISTORY

This function lets you see all the history relating to this template.

**Step 1:** Select **Edit History** to view

News & Statistics Supplier Approval Quality Management Trading & Planning More Steve

### Supplier Document Manager

Documents Received Documents Exceptions Sign Off Review Activity Overview **Template Manager** Admin

[Add Form Template](#) [Delete Selected](#) [Activate Selected](#) [Duplicate Template](#)

<input type="checkbox"/>	Last Updated	Template Name	Created By	Status	
<input type="checkbox"/>	03/04/2019 10:56:22		Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	20/11/2018 12:38:07	Glass Brittle Procedure	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	20/11/2018 12:47:20	Lamb Part 1 Specification	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	20/11/2018 12:44:02	Pork Part 1 Specification	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	13/11/2018 09:37:59	Raw Material Specifications	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	03/12/2018 12:15:36	Raw Material Specifications - (SITE 2 ONLY)	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	03/12/2018 12:14:03	Raw Material Specifications - (SITE 3 ONLY)	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	20/11/2018 12:41:40	Supplier Audit Procedure	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	04/06/2019 10:13:39	Supplier Non-Conformance Procedure	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	13/11/2018 09:31:08	Technical conditions of supply ingredients	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	03/12/2018 12:13:23	Technical conditions of supply ingredients - (SITE 3 ONLY)	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	13/11/2018 09:29:11	Technical conditions of supply meat	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	20/11/2018 12:53:19	Transport Food Safety Specification	Steve Jones	Active	Preview Update Edit History Settings
<input type="checkbox"/>	07/03/2019 14:31:58		Steve Jones	Inactive	Preview Update Edit History Settings



## Step 2: View history

### Supplier Document Manager - Form Template History

[← Back to List](#)

#### Glass Brittle Procedure

Below is a list of all current edits made to this template.

Date/Time	User	Edit Details
20/11/2018 12:38:07	Steve Jones	Added new Field 'Evidence' of type 'Large Image(s)' to Section 'Images'
20/11/2018 12:38:07	Steve Jones	Added New Section 'Images'
13/11/2018 09:00:03	Steve Jones	Added New Section 'Procedure'
13/11/2018 08:59:50	Steve Jones	Added New Section 'Risk assessment'
13/11/2018 08:58:20	Steve Jones	Added new Field 'RS2' of type 'Textarea' to Section 'Responsibilities'
13/11/2018 08:57:52	Steve Jones	Added new Field 'RS1' of type 'Textarea' to Section 'Responsibilities'
13/11/2018 08:57:33	Steve Jones	Added new Field 'Responsibility' of type 'Standard Checkboxes' to Section 'Responsibilities'

## 3. BUILDING THE DOCUMENT

**Step 1:** On the *Supplier Document Manager* select *New Document* then choose *Form Template*

[News & Statistics](#)
[Supplier Approval](#)
[Quality Management](#)
[Trading & Planning](#)
[More](#)
[Steve](#)

### Supplier Document Manager

[Documents](#)
[Received Documents](#)
[Exceptions](#)
[Sign Off Review](#)
[Activity Overview](#)
[Template Manager](#)
[Admin](#)

Site: 
Created By: 
Status: 
Category: 
Sort By: 
Search: 
[Filter](#)
[Clear Filters](#)

[New Document](#)
[Share with Suppliers](#)
[Delete Selected](#)
[View Selected](#)
[Comparison Tool](#)

25 50 100 All | << first < previous next > last >>

	Document Name	Document Category	Version	Status	
<input type="checkbox"/>	30/03/2020 12:17:35	Technical Conditions of supply ingredients	Technical	1	Completed & Approved
<input type="checkbox"/>	17/06/2019 12:37:29	Technical Conditions of Supply	Technical	1	Completed & Approved
<input type="checkbox"/>	04/06/2019 11:18:38	Supplier Non-Conformance Procedure	Technical	1	Completed & Approved

**Step 2:** This is where you setup the details for that Supplier Check.

Supplier Document Manager - Add a Document

Document Details

Site: Demo Co (Group) ▼

Select Template: Glass Brittle Procedure ▼

Document Name: New Document

Document Category: Technical ▼

Set your check to a site

Set your template

Name your document

Select the category it's in

Cancel Save Save & Build Document

**Step 3:** Once done above select **Save & Build Document**

Supplier Document Manager - Add a Document

Document Details

Site: Demo Co (Group) ▼

Select Template: Glass Brittle Procedure ▼

Document Name: New Document

Document Category: Technical ▼

Cancel Save **Save & Build Document**

**Step 4:** This is where you add the content of your document in. So copy your text and past into the free spaces.

Supplier Document Manager - New Document

Cancel Save Save & Exit

**Scope**

S1

**Responsibilities**

Frequency ☒ Daily  
☐ Monthly  
☐ Weekly  
☐ As required  
☐ At all times

Record No/Name ☒ QC09  
☐ QC66  
☐ Glass/Hard plastic breakage/Allergen/Spillage form  
☐ QC15  
☐ RA15  
☐ N/A  
☐ QC65

Responsibility ☐ All staff  
☐ Engineers  
☐ Departmental supervisors  
☐ Quality assurance  
☐ Hygiene  
☐ Managers

RS1

RS2

**Step 5:** Once done select **Save & Exit**.

Supplier Document Manager - New Document

Cancel Save **Save & Exit**

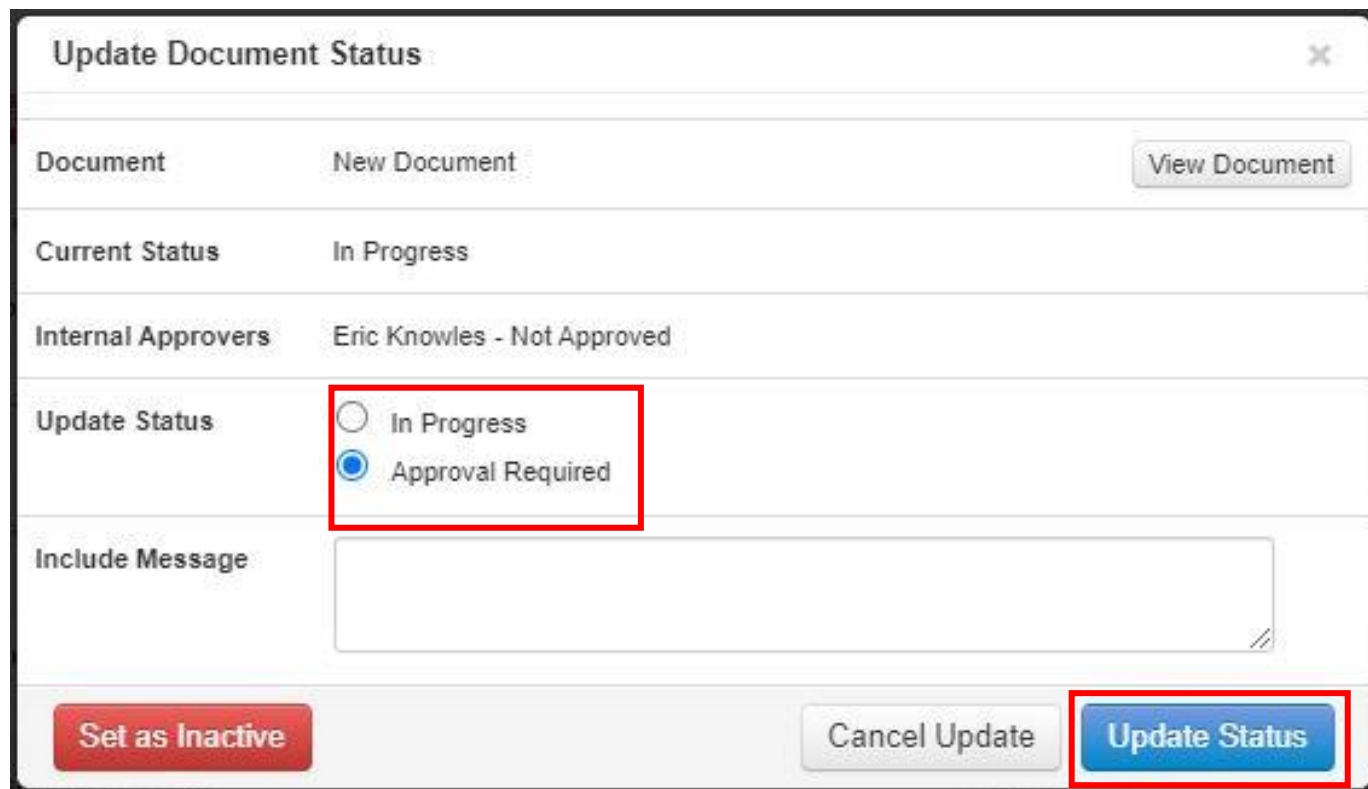
**Scope**

S1

**Responsibilities**

Frequency ☒ Daily  
☐ Monthly  
☐ Weekly  
☐ As required  
☐ At all times

**Step 6:** The modal below will open up. Then choose the status that the document is on. If you are still working on it choose **In Progress**. If you are finished and it needs approved choose **Approval Required**. Once done select **Update Status**.



The modal titled "Update Document Status" contains the following fields and buttons:

- Document:** New Document (with a "View Document" button)
- Current Status:** In Progress
- Internal Approvers:** Eric Knowles - Not Approved
- Update Status:** Two radio buttons are shown: "In Progress" (unselected) and "Approval Required" (selected). This section is highlighted with a red box.
- Include Message:** A text input field.
- Buttons:** "Set as Inactive" (red), "Cancel Update" (grey), and "Update Status" (blue). The "Update Status" button is highlighted with a red box.

**Step 7:** The status in the main table will look like this below. This document needs to be approved now by the Internal Approver. They will get a notification & email to do so. To do the Approve steps

**Supplier Document Manager**

Documents | Received Documents | Exceptions | Sign Off Review | Activity Overview | Template Manager | Admin

Site: All | Created By: All | Status: All | Category: All | Sort By: Last Updated (Desc) | Search: Search... | Filter | Clear Filters

+ New Document | Share with Suppliers | Delete Selected | View Selected | Comparison Tool | 25 | 50 | 100 | All | << first | < previous | next > | last >>

	Date	Document Name	Document Category	Version	Status	
<input type="checkbox"/>	06/07/2020 15:22:57	New Document	Technical	1	Approval Required	
<input type="checkbox"/>	30/03/2020 12:17:35	Technical Conditions of supply ingredients	Technical	1	Completed & Approved	

### 3.1 UPLOAD A DOCUMENT (Attaching A PDF)

On the Supplier Document Manager, you can also upload PDF documents. This is a bridging mechanism that allows you to quickly add all your docs to Foods Connected if you don't have time to begin to manually create. BUT the system works best with manually created documents as the system track the changes that way.

**Step 1:** On the *Supplier Document Manager* select **New Document** then choose **Upload File**

The screenshot shows the 'Supplier Document Manager' interface. At the top, there's a navigation bar with 'Documents' selected. Below it, there are filter tabs: Site, Created By, Status, Category, Sort By, and Search. The 'New Document' button is highlighted, and its dropdown menu is open, showing 'Form Template' and 'Upload File' (which is selected). Below the menu, there's a table of documents. The table has columns: Date, Document Name, Document Category, Version, Status, and an action icon. The first document is 'Foyle Food Egg Contract' with status 'In Progress'. The second document is 'ABP Statement June' with status 'Completed & Approved'.

**Step 2:** Select which **Site** the doc relates too, add the file, add a **Document Name** and then select the **Document Category** they relate too. Once done select **Save**

The screenshot shows the 'Supplier Document Manager - Add a Document' form. It has sections for 'Document Details'. The 'Site' dropdown is set to 'Foods Connected Ltd (Group)'. The 'Select File' section has a button 'Click to select document'. The 'Document Name' field is empty. The 'Document Category' dropdown is set to 'Technical'. At the bottom right, there are 'Cancel' and 'Save' buttons.

### 3.2 VIEW DOCUMENT

**Step 1:** Select edit icon then select **View Document**

The screenshot shows the 'Supplier Document Manager' interface. The 'New Document' dropdown menu is open, and the 'View Document' option is highlighted. Below the menu, there's a table of documents. The table has columns: Date, Document Name, Document Category, Version, Status, and an action icon. The first document is 'New Document' with status 'Approval Required'. The second document is 'Technical Conditions of supply ingredients' with status 'Completed & Approved'. The third document is 'Technical Conditions of Supply' with status 'Completed & Approved'. The fourth document is 'Supplier Non-Conformance Procedure' with status 'Completed & Approved'. The fifth document is 'Organisational Structure' with status 'Completed & Approved'.

## Step 2: Once done *Close*

Close
Hide Updates History
Export to PDF

### New Template

Document
New Document

Version
1 (06/07/2020)

#### Part 1

Clause 1.1
Info

#### Updates History

Delete Selected

<input type="checkbox"/>	Date	Update By	Update Description
<input type="checkbox"/>	06/07/2020	Steve Jones	Updated the status to Approval Required
<input type="checkbox"/>	06/07/2020	Steve Jones	Created Document

## 3.3 VIEW DOCUMENT DETAILS

### Step 1: Select edit icon then select *View Document Details*

Supplier Document Manager

Documents
← Received Documents
Exceptions
Sign Off Review
Activity Overview
Template Manager
Admin

Site
Created By
Status
Category
Sort By
Search

All
All
All
All
Last Updated (Desc)
Search...
Filter
Clear Filters

New Document
Share with Suppliers
Delete Selected
View Selected
Comparison Tool
25 50 100 All
<< first
previous
next >
last >>

<input type="checkbox"/>	Date	Document Name	Document Category	Version	Status	
<input type="checkbox"/>	06/07/2020 15:22:57	New Document	Technical	1	Approval Required	View Document View Document Details Edit Details Edit Document Update Status Update Version Notify Team Members Duplicate Document Share Document
<input type="checkbox"/>	30/03/2020 12:17:35	Technical Conditions of supply ingredients	Technical	1	Completed & Approved	
<input type="checkbox"/>	17/06/2019 12:37:29	Technical Conditions of Supply	Technical	1	Completed & Approved	
<input type="checkbox"/>	04/06/2019 11:18:38	Supplier Non-Conformance Procedure	Technical	1	Completed & Approved	
<input type="checkbox"/>	04/06/2019 11:16:43	Organisational Structure	Commercial	1.1	Completed & Approved	

## Step 2: Scroll through details

Document Information

Details
Updates History
Sharing History
External Sign Offs

Document: New Document

Status: Approval Required

Version: 1

Internal Approval: Eric Knowles - Not Approved

Created By: Steve Jones

Last Updated: 06/07/2020 15:22:57

View

## 3.4 EDIT DETAILS

If you need to edit the setup details of the document please do this here

### Step 1: Select *Edit Details*

Supplier Document Manager

Documents
← Received Documents
Exceptions
Sign Off Review
Activity Overview
Template Manager
Admin

Site: All
Created By: All
Status: All
Category: All
Sort By: Last Updated (Desc)
Search: Search...
Filter
Clear Filters

New Document
Share with Suppliers
Delete Selected
View Selected
Comparison Tool
25 50 100 All | << first < previous next > last >>

<input type="checkbox"/>	Date	Document Name	Document Category	Version	Status	
<input type="checkbox"/>	06/07/2020 15:22:57	New Document	Technical	1	Approval Required	
<input type="checkbox"/>	30/03/2020 12:17:35	Technical Conditions of supply ingredients	Technical	1	Completed & Approved	View Document View Document Details <b>Edit Details</b> Edit Document Update Status Update Version Notify Team Members Duplicate Document Share Document
<input type="checkbox"/>	17/06/2019 12:37:29	Technical Conditions of Supply	Technical	1	Completed & Approved	
<input type="checkbox"/>	04/06/2019 11:18:38	Supplier Non-Conformance Procedure	Technical	1	Completed & Approved	
<input type="checkbox"/>	04/06/2019 11:16:43	Organisational Structure	Commercial	1.1	Completed & Approved	



## Step 2: Change detail & select Save when done

### Supplier Document Manager - Edit Document

Please note that editing site or category will directly affect the approvers for this documents signoff process. The document will reset to approval required and must go through the approval process again...

#### Document Details

Site: Demo Co (Group) ▼

Document Name: New Document

Document Category: Technical ▼

Linked Documents: Search for documents Add +

Start typing to search your Documents by Name.

Cancel Save

## 3.5 EDIT DOCUMENT

If you need to edit the document and content, please do this here.

## Step 1: Select *Edit Document*

### Supplier Document Manager

Documents Received Documents Exceptions Sign Off Review Activity Overview Template Manager Admin

Site: All Created By: All Status: All Category: All Sort By: Last Updated (Desc) Search: Search... Filter Clear Filters

New Document Share with Suppliers Delete Selected View Selected Comparison Tool 25 50 100 All << first < previous next > last >>

<input type="checkbox"/>	Date	Document Name	Document Category	Version	Status	
<input type="checkbox"/>	06/07/2020 15:22:57	New Document	Technical	1	Approval Required	
<input type="checkbox"/>	30/03/2020 12:17:35	Technical Conditions of supply ingredients	Technical	1	Completed & Approved	
<input type="checkbox"/>	17/06/2019 12:37:29	Technical Conditions of Supply	Technical	1	Completed & Approved	
<input type="checkbox"/>	04/06/2019 11:18:38	Supplier Non-Conformance Procedure	Technical	1	Completed & Approved	
<input type="checkbox"/>	04/06/2019 11:16:43	Organisational Structure	Commercial	1.1	Completed & Approved	

View Document  
View Document Details  
Edit Details  
**Edit Document**  
Update Status  
Update Version  
Notify Team Members  
Duplicate Document  
Share Document

**Step 2:** Now edit the doc content, that is the text content. Once done select **Save & Exit**

### Supplier Document Manager - New Document

This document Form is currently set to Approval Required making changes will automatically reset it back to In Progress and it will need to be signed off internally again.

Cancel Save Save & Exit

#### Part 1

Clause 1.1 ⓘ

Edit doc content that is the text only. |

Cancel Save Save & Exit

### 3.6 UPDATE STATUS

You can change the status of the document and you have a few options to choose from based on your access.

#### Step 1: Select *Update Status*

**Supplier Document Manager**

Documents ← Received Documents Exceptions Sign Off Review Activity Overview Template Manager Admin

Site: All Created By: All Status: All Category: All Sort By: Last Updated (Desc) Search: Search... Filter Clear Filters

+ New Document Share with Suppliers Delete Selected View Selected Comparison Tool 25 50 100 All | << first < previous next > last >>

<input type="checkbox"/>	Date	Document Name	Document Category	Version	Status	
<input type="checkbox"/>	06/07/2020 15:22:57	New Document	Technical	1	Approval Required	⋮
<input type="checkbox"/>	30/03/2020 12:17:35	Technical Conditions of supply ingredients	Technical	1	Completed & Approved	⋮
<input type="checkbox"/>	17/06/2019 12:37:29	Technical Conditions of Supply	Technical	1	Completed & Approved	⋮
<input type="checkbox"/>	04/06/2019 11:18:38	Supplier Non-Conformance Procedure	Technical	1	Completed & Approved	⋮
<input type="checkbox"/>	04/06/2019 11:16:43	Organisational Structure	Commercial	1.1	Completed & Approved	⋮

- View Document
- View Document Details
- Edit Details
- Edit Document
- Update Status**
- Update Version
- Notify Team Members
- Duplicate Document
- Share Document

**Step 2:** The status is defaulted to Approval Required as this document is ready to be approved.

Update Document Status

Document

New Document

View Document

Current Status

Approval Required

Internal Approvers

Eric Knowles - Not Approved

Update Status

☐ In Progress
 ☒ Approval Required

Include Message

Set as Inactive

Cancel Update

Update Status

**Step 3:** Change the status to reflect the document stage that you are at. Once done select **Update Status**

Update Document Status

Document

New Document

View Document

Current Status

Approval Required

Internal Approvers

Eric Knowles - Not Approved

Update Status

☒ In Progress
 ☐ Approval Required

Include Message

Set as Inactive

Cancel Update

Update Status

**Step 4:** The status in the main table is now **In Progress**

Supplier Document Manager						
<div> <div>Documents</div> <div> <a>← Received Documents</a> <a>🔍 Exceptions</a> <a>📝 Sign Off Review</a> <a>📊 Activity Overview</a> <a>📄 Template Manager</a> <a>⚙️ Admin</a> </div> </div>						
Site	Created By	Status	Category	Sort By	Search	
All	All	All	All	Last Updated (Desc)	Search...	<div>Filter</div> <div>Clear Filters</div>
<div> <div>New Document</div> <div>Share with Suppliers</div> <div>Delete Selected</div> <div>View Selected</div> <div>Comparison Tool</div> <div>25 50 100 All</div> <div>&lt;&lt; first &lt; previous next &gt; last &gt;&gt;</div> </div>						
<input type="checkbox"/>	Date	Document Name	Document Category	Version	Status	
<input type="checkbox"/>	06/07/2020 15:58:11	New Document	Technical	1	In Progress	

### 3.7 UPDATE VERSION

If you need to update the version and have access to do so please do this here

#### Step 1: Select **Update Version**

**Supplier Document Manager**

Documents ← Received Documents Exceptions Sign Off Review Activity Overview Template Manager Admin

Site: All Created By: All Status: All Category: All Sort By: Last Updated (Desc) Search: Search... Filter Clear Filters

+ New Document Share with Suppliers Delete Selected View Selected Comparison Tool 25 50 100 All | << first < previous next > last >>

<input type="checkbox"/>	Date	Document Name	Document Category	Version	Status	
<input type="checkbox"/>	06/07/2020 15:58:11	New Document	Technical	1	In Progress	
<input type="checkbox"/>	30/03/2020 12:17:35	Technical Conditions of supply ingredients	Technical	1	Completed & Approved	
<input type="checkbox"/>	17/06/2019 12:37:29	Technical Conditions of Supply	Technical	1	Completed & Approved	
<input type="checkbox"/>	04/06/2019 11:18:38	Supplier Non-Conformance Procedure	Technical	1	Completed & Approved	
<input type="checkbox"/>	04/06/2019 11:16:43	Organisational Structure	Commercial	1.1	Completed & Approved	

- View Document
- View Document Details
- Edit Details
- Edit Document
- Update Status
- Update Version**
- Notify Team Members
- Duplicate Document

**Step 2:** Enter in the new version number, include any comments for the record. Once done select **Update Version**

Update Document Version

Document

New Document

View Document

Current Status

In Progress

Current Version

1

Update Version

1.1

Include Message

Close / Leave as Current Version

Update Version

### 3.8 NOTIFY TEAM MEMBERS

If you want to share a document with team members or notify them a document is complete do this here

#### Step 1: Select *Notify Team Members*

**Supplier Document Manager**

Documents ← Received Documents Exceptions Sign Off Review Activity Overview Template Manager Admin

Site: All Created By: All Status: All Category: All Sort By: Last Updated (Desc) Search: Search... Filter Clear Filters

+ New Document Share with Suppliers Delete Selected View Selected Comparison Tool 25 50 100 All << first < previous next > last >>

<input type="checkbox"/>	Date	Document Name	Document Category	Version	Status	
<input type="checkbox"/>	06/07/2020 15:58:11	New Document	Technical	1	In Progress	
<input type="checkbox"/>	30/03/2020 12:17:35	Technical Conditions of supply ingredients	Technical	1	Completed & Approved	
<input type="checkbox"/>	17/06/2019 12:37:29	Technical Conditions of Supply	Technical	1	Completed & Approved	
<input type="checkbox"/>	04/06/2019 11:18:38	Supplier Non-Conformance Procedure	Technical	1	Completed & Approved	
<input type="checkbox"/>	04/06/2019 11:16:43	Organisational Structure	Commercial	1.1	Completed & Approved	

- View Document
- View Document Details
- Edit Details
- Edit Document
- Update Status
- Update Version
- Notify Team Members**
- Duplicate Document
- Share Document

#### Step 2: Choose the people or teams you want to notify, add a message if you want & then select *Notify Team Members*

**Notify Team Members**

Company Users Include Message (Optional)

Search team members...

<input type="checkbox"/>	Name	Site
<input checked="" type="checkbox"/>	Commercial	Group
<input checked="" type="checkbox"/>	HR	Group
<input checked="" type="checkbox"/>	Maintenance	Group
<input type="checkbox"/>	Night Shift	Group
<input type="checkbox"/>	Production Team	Group
<input type="checkbox"/>	Quality	Group
<input type="checkbox"/>	Technical	Group
<input type="checkbox"/>	Eugene Delacroix	Group
<input type="checkbox"/>	Eric Knowles	Group
<input type="checkbox"/>	Tim Maud	Group

Cancel Notify Team Members



### 3.9 DUPLICATE DOCUMENT

Duplicating a document can be useful if you are creating a similar document but may have slightly different content. It can be a quick way to create & edit.

#### Step 1: Select *Duplicate Document*

**Supplier Document Manager**

Documents ← Received Documents Exceptions Sign Off Review Activity Overview Template Manager Admin

Site: All Created By: All Status: All Category: All Sort By: Last Updated (Desc) Search: Search... Filter Clear Filters

+ New Document Share with Suppliers Delete Selected View Selected Comparison Tool 25 50 100 All | << first < previous next > last >>

<input type="checkbox"/>	Date	Document Name	Document Category	Version	Status	
<input type="checkbox"/>	06/07/2020 15:58:11	New Document	Technical	1	In Progress	
<input type="checkbox"/>	30/03/2020 12:17:35	Technical Conditions of supply ingredients	Technical	1	Completed & Approved	View Document View Document Details Edit Details Edit Document Update Status Update Version Notify Team Members <b>Duplicate Document</b> Share Document
<input type="checkbox"/>	17/06/2019 12:37:29	Technical Conditions of Supply	Technical	1	Completed & Approved	
<input type="checkbox"/>	04/06/2019 11:18:38	Supplier Non-Conformance Procedure	Technical	1	Completed & Approved	
<input type="checkbox"/>	04/06/2019 11:16:43	Organisational Structure	Commercial	1.1	Completed & Approved	

#### Step 2: Add *Document Name* & the *Category* it is in. Once done select *Save & Build Document*

**Supplier Document Manager - Add a Document**

Duplicating Document: Set the Document Details and choose to duplicated this Document.

Document Details

Site: Demo Co (Group) ▼

Document Name: New Document

Document Category: Technical ▼

Cancel Save **Save & Build Document**

## 4. APPROVING THE DOCUMENT INTERNALLY BEFORE SENDING OUT

You can only approve a document if you have access and are set as an Internal Approver

**Step 1:** The approver of the document will get an email & task in their Task Manager to approve. It will look like this below

The screenshot shows the 'My Tasks' dashboard in the Foods Connected system. The dashboard has a dark blue header with navigation links: News & Statistics, Supplier Approval, Quality Management, Trading & Planning, More, and Eric. The 'My Tasks' section is on the right, showing 9 outstanding tasks. The first task, 'Steve Jones set a Document to Approval Required', is highlighted. The 'Latest News' section on the left contains three articles: 'It would require a 'monumental shift' for sustainability to top the corporate agenda', 'Experts weigh in on digestive health in Kerry Health and Nutrition Institute webinar', and 'The Beyond Burger finally goes on sale in Tesco'.

**Step 2:** The approver select the task above

The screenshot shows the 'My Tasks' dashboard in the Foods Connected system. The dashboard has a dark blue header with navigation links: News & Statistics, Supplier Approval, Quality Management, Trading & Planning, More, and Eric. The 'My Tasks' section is on the right, showing 9 outstanding tasks. The first task, 'Steve Jones set a Document to Approval Required', is highlighted with a red box. The 'Latest News' section on the left contains three articles: 'It would require a 'monumental shift' for sustainability to top the corporate agenda', 'Experts weigh in on digestive health in Kerry Health and Nutrition Institute webinar', and 'The Beyond Burger finally goes on sale in Tesco'.

**Step 3:** Select **Sign Off** to approve. If you are not happy input a message and select **Requires Review**

Update Document Status

Document

New Document

View Document

Current Status

Approval Required

Internal Approvers

Eric Knowles - Not Approved

Include Message

Set as Inactive

Cancel Update

Requires Review

Sign Off

**Step 4:** The status is now **Completed & Approved**

Supplier Document Manager					
<div> <div>Documents</div> <div>← Received Documents</div> <div>⌚ Exceptions</div> <div>✓ Sign Off Review</div> <div>📋 Activity Overview</div> <div>📄 Template Manager</div> <div>🔧 Admin</div> </div>					
Site	Created By	Status	Category	Sort By	Search
All	All	All	All	Last Updated (Desc)	Search...
					Filter
					Clear Filters
<div> <div>New Document</div> <div>Share with Suppliers</div> <div>Delete Selected</div> <div>View Selected</div> <div>Comparison Tool</div> </div>					
25 50 100 All   << first < previous next > last >>					
Date	Document Name	Document Category	Version	Status	
06/07/2020 16:29:44	New Document	Technical	1	Completed & Approved	

## 5. DELETE DOCUMENTS

**Step 1:** To delete a document, select the one you want to delete, then select **Delete Selected**

**Supplier Document Manager**

Documents ← Received Documents Exceptions Sign Off Review Activity Overview Template Manager Admin

Site: All Created By: All Status: All Category: All Sort By: Last Updated (Desc) Search: Search... Filter Clear Filters

New Document Share with Suppliers **Delete Selected** View Selected Comparison Tool 25 50 100 All | << first < previous next > last >>

<input type="checkbox"/>	Date	Document Name	Document Category	Version	Status	
<input checked="" type="checkbox"/>	06/07/2020 16:29:44	New Document	Technical	1	Completed & Approved	
<input type="checkbox"/>	30/03/2020 12:17:35	Technical Conditions of supply ingredients	Technical	1	Completed & Approved	

## 6. VIEW SELECTED

**Step 1:** To view your documents in one page select the documents

**Supplier Document Manager**

Documents ← Received Documents Exceptions Sign Off Review Activity Overview Template Manager Admin

Site: All Created By: All Status: All Category: All Sort By: Last Updated (Desc) Search: Search... Filter Clear Filters

New Document Share with Suppliers Delete Selected **View Selected** Comparison Tool 25 50 100 All | << first < previous next > last >>

<input type="checkbox"/>	Date	Document Name	Document Category	Version	Status	
<input checked="" type="checkbox"/>	06/07/2020 16:29:44	New Document	Technical	1	Completed & Approved	
<input checked="" type="checkbox"/>	30/03/2020 12:17:35	Technical Conditions of supply ingredients	Technical	1	Completed & Approved	
<input type="checkbox"/>	17/06/2019 12:37:29	Technical Conditions of Supply	Technical	1	Completed & Approved	

**Step 2:** Now select **View Completed**

**Supplier Document Manager**

Documents ← Received Documents Exceptions Sign Off Review Activity Overview Template Manager Admin

Site: All Created By: All Status: All Category: All Sort By: Last Updated (Desc) Search: Search... Filter Clear Filters

New Document Share with Suppliers Delete Selected **View Selected** Comparison Tool 25 50 100 All | << first < previous next > last >>

<input type="checkbox"/>	Date	Document Name	Document Category	Version	Status	
<input checked="" type="checkbox"/>	06/07/2020 16:29:44	New Document	Technical	1	Completed & Approved	
<input checked="" type="checkbox"/>	30/03/2020 12:17:35	Technical Conditions of supply ingredients	Technical	1	Completed & Approved	
<input type="checkbox"/>	17/06/2019 12:37:29	Technical Conditions of Supply	Technical	1	Completed & Approved	

**Step 3:** You can now view your docs. Once done select **Back**

[Back](#)
[Hide Updates History](#)
[Export to PDF](#)

Viewing 2 documents


## New Template

Document

New Document

Version


1 (06/07/2020)



### Policy Statement

- 1.1 It is the policy of Demo Co and its subsidiary Companies\* to purchase from reputable and approved raw material suppliers who operate good manufacturing practices, who are able to consistently meet our technical conditions of supply and who can demonstrate compliance with all relevant United Kingdom / EU legislation (as applicable) and associated codes of practice.
- 1.2 Each supplier will be provided with a copy of the Technical Conditions of Supply at commencement of supply. To support our due diligence each supplier will be asked to accept the document on the Foods Connected website. Updates to Technical Conditions of Supply may be issued to our suppliers at any time of the year but normally at their review.
- 1.3 It is the policy of Demo Co to work with our suppliers in order to ensure that the standards laid down within this Technical Conditions and Supply document are achieved.
- 1.4 In accordance with the Sale of Goods Act all goods supplied to Demo Co are supplied under a contract of sale and NOT supplied under a contract for sale by sample.
- 1.5 All commercial contracts and dealings with Demo Co and its subsidiary companies shall be carried out in full compliance with the requirements of the UK Bribery Act 2010.
- 1.6 Accepting the document on / via Foods Connected will be classed as evidence of supplier compliance with requirements of Demo Co Technical Conditions of Supply.
- 1.7 Any queries regarding the Technical Conditions of Supply should be relayed to the following address:
- 1.8 Compliance with the Demo Co Technical Conditions of Supply does not absolve suppliers from their legal obligations relating to food safety, legality or quality of the goods supplied.
- 1.9 Group Technical Services Department
- 1.10 \*Please refer to Appendix

Updates History

 Delete Selected

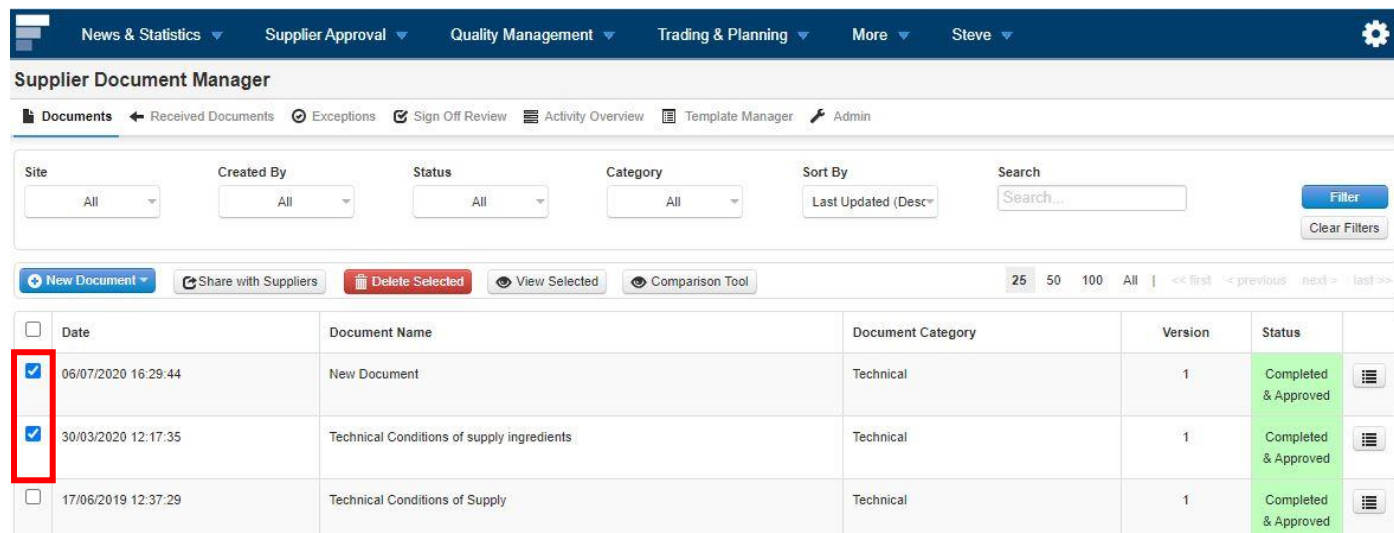
<input type="checkbox"/>	Date	Update By	Update Description
<input type="checkbox"/>	06/07/2020	Eric Knowles	Updated the status to Completed & Approved
<input type="checkbox"/>	06/07/2020	Eric Knowles	Approved the Document
<input type="checkbox"/>	06/07/2020	Steve Jones	Updated the status to Approval Required
<input type="checkbox"/>	06/07/2020	Steve Jones	Updated the status to In Progress
<input type="checkbox"/>	06/07/2020	Steve Jones	Updated the status to Approval Required
<input type="checkbox"/>	06/07/2020	Steve Jones	Created Document



## 7. SHARING A DOCUMENT WITH SUPPLIERS TO SIGN OFF

To share a document with your suppliers the status must be **Completed & Approved**.

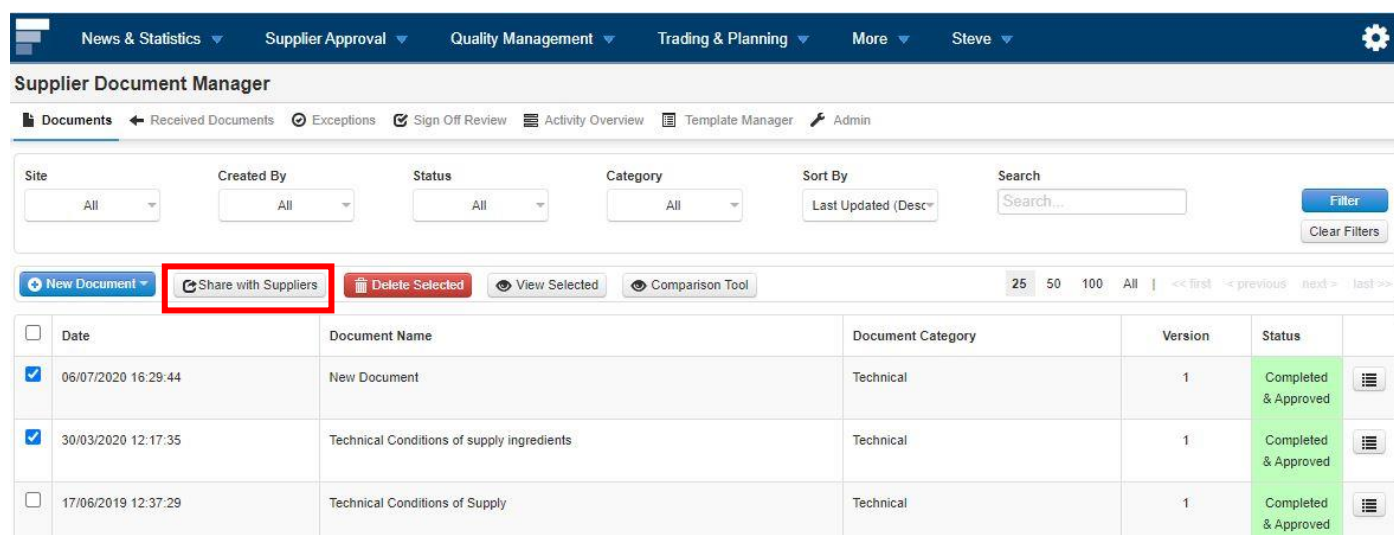
**Step 1:** Simply select the documents you want to share on the left.



The screenshot shows the 'Supplier Document Manager' interface. At the top, there's a navigation bar with 'News & Statistics', 'Supplier Approval', 'Quality Management', 'Trading & Planning', 'More', and 'Steve'. Below this is a sub-header 'Supplier Document Manager' with tabs for 'Documents', 'Received Documents', 'Exceptions', 'Sign Off Review', 'Activity Overview', 'Template Manager', and 'Admin'. A filter section includes dropdowns for 'Site', 'Created By', 'Status', and 'Category', a 'Sort By' dropdown set to 'Last Updated (Desc)', and a search bar. Below the filters are buttons for 'New Document', 'Share with Suppliers', 'Delete Selected', 'View Selected', and 'Comparison Tool'. A table lists documents with columns: Date, Document Name, Document Category, Version, Status, and an icon column. The first two documents are selected with checkboxes.

Date	Document Name	Document Category	Version	Status	
<input checked="" type="checkbox"/> 06/07/2020 16:29:44	New Document	Technical	1	Completed & Approved	
<input checked="" type="checkbox"/> 30/03/2020 12:17:35	Technical Conditions of supply ingredients	Technical	1	Completed & Approved	
<input type="checkbox"/> 17/06/2019 12:37:29	Technical Conditions of Supply	Technical	1	Completed & Approved	

**Step 2:** Then select **Share With Suppliers**



This screenshot is identical to the previous one, but the 'Share with Suppliers' button in the toolbar is highlighted with a red box, indicating the next step in the process.

**Step 3:** The select the suppliers you want to share with, then select **Next Step**

Supplier Document Manager - Share Document ← Back

Multiple Documents - Send to Suppliers: Step 1

Supplier Type: All   
 Supplier Sub Type: All   
 Status: All   
 Show if has existing share: Yes   
 Filter Clear Filters

Primary/Secondary: All   
 High Risk: All

Search...

Next Step >

<input type="checkbox"/> Supplier/Customer	Supplier Name	Supplier Type
<input checked="" type="checkbox"/> Supplier	Abattoir 1	Abattoirs
<input checked="" type="checkbox"/> Supplier	Abattoir 2	Abattoirs
<input type="checkbox"/> Supplier	Abattoir 3	Abattoirs

**Step 4:** Now choose your sign off details for the documents.

Supplier Document Manager - Share Document

Multiple Documents - Send to Suppliers: Step 2

Requires Sign Off: Yes   
 Sign Off Required By: 21/07/2020 13:00   
 Sign Off Frequency: Yearly   
 Declaration: Use Supplier Declaration   
 Receive Signed Off Notification Email: Yes   
 Notify Recipients By Email: Yes   
 Message To Include With Email: Enter message

Set to yes if you want your recipients to receive a notification

Set to yes if you want to receive a notification

Set the frequency the doc needs signed off

Set the date & time that sign off is required by

If the docs require a sign off select

Set the declaration to use

Via	Contact Name
---	User 1 Abattoir (Technical Contac
---	User 1 Abattoir 2 (Technical Conti

< Back Send to Recipients

**Step 5:** The system automatically populates the main tech contact to send the doc too in contact name box. You can also choose someone to CC with the supplier. Once done select **Send To Recipients**

Supplier Document Manager - Share Document ← Back

Multiple Documents - Send to Suppliers: Step 2

< Back Send to Recipients

---

Requires Sign Off Yes ▼

Sign Off Required By 21/07/2020 13:00

Sign Off Frequency Yearly ▼

Declaration Use Supplier Declaration ▼

Receive Signed Off Notification Email Yes ▼

Notify Recipients By Email Yes ▼

Message To Include With Email Enter message

---

Supplier Name	Via	Contact Name
Abattoir 1	---	<div style="border: 2px solid red; padding: 5px;"> <div style="display: flex; justify-content: space-between;"> <span>User 1 Abattoir (Technical Contac ▼</span> <span>- CC in User(s) - ▼</span> </div> <div style="border: 1px solid #ccc; padding: 2px; margin-top: 2px;">User 1 Abattoir</div> </div>
Abattoir 2	---	<div style="display: flex; justify-content: space-between;"> <span>User 1 Abattoir 2 (Technical Cont: ▼</span> <span>- CC in User(s) - ▼</span> </div>

< Back Send to Recipients

**Step 6:** Once sent you will see this message.

Supplier Document Manager

Documents
← Received Documents
 Exceptions
 Sign Off Review
 Activity Overview
 Template Manager
 Admin

Your selected documents have been successfully shared.

---

Site: All ▼
 Created By: All ▼
 Status: All ▼
 Category: All ▼
 Sort By: Last Updated (Desc▼
 Search: Search...
Filter
Clear Filters

---

+ New Document ▼
 Share with Suppliers
 Delete Selected
 View Selected
 Comparison Tool
25 50 100 All | << first < previous next > last >>

<input type="checkbox"/>	Date	Document Name	Document Category	Version	Status	
<input type="checkbox"/>	06/07/2020 16:29:44	New Document	Technical	1	Completed & Approved	
<input type="checkbox"/>	30/03/2020 12:17:35	Technical Conditions of supply ingredients	Technical	1	Completed & Approved	

**Step 7:** If this document is rejected by the supplier you will see this in the Sign off review and look at the steps there.

## 8. EXCEPTIONS

You can grant & record an exception to your document for a period & require sign off or not.

### 8.1 GRANTING AN EXCEPTION

**Step 1:** Select *Exceptions*, then select *New Exception*

**Supplier Document Manager**

Documents ← Received Documents **Exceptions** Sign Off Review Activity Overview Template Manager Admin

Currently viewing: All Sites Document Exceptions Change Viewing 2 results | Page 1 of 1

**New Exception** Delete Selected

Created By	Document	Date Range	Details	Status
Steve Jones Demo Co	Supplier Audit Procedure	06 February 2019 to 06 March 2020	supplier does not have to meet requirements 1.1	✗
Steve Jones Demo Co	Raw Material Specifications	05 February 2019 to 05 March 2019	Please disregard points 1 and 2	✓

25 50 100 All | << first < prev next > last >>

**Step 2:** Now select the details of the exception

**Supplier Document Manager - Create Document Exception**

Site: Demo Co (Group) Choose the site this exception relates too

Document: New Document Choose the document that the exception is on

Start Date: 07/07/2020 Choose the start date & end date for the exception

End Date: 07/08/2021

Exception Details: Please enter exception details here Enter in the exception details

Sign-off Required: ☒ Yes ☐ No Choose if this exception requires a sign off or not

Save Save & Send Save & Exit

### Step 3: Once done select **Save & Send**

**Supplier Document Manager - Create Document Exception** ← Back

Site: Demo Co (Group) ▼

Document: New Document ▼

Start Date: 07/07/2020

End Date: 07/08/2021

Exception Details:   
Please enter exception details here

Sign-off Required: ☒ Yes ☐ No

**Save** ▼  
Save & Send  
Save & Exit

### Step 4: Now select the supplier to send too, then select **Next**

**Supplier Document Manager - Share Exception** ← Back Next

Search...

<input type="checkbox"/>	Supplier/Customer	Supplier Name
<input type="checkbox"/>	Customer	Abattoir 1
<input checked="" type="checkbox"/>	Supplier	Abattoir 1
<input type="checkbox"/>	Customer	Abattoir 2
<input type="checkbox"/>	Supplier	Abattoir 2
<input type="checkbox"/>	Customer	Abattoir 3

### Step 5: Now choose the date the sign off is required by & the user to sign it off. Once done select **Send**.

**Supplier Document Manager - Share Exception** ← Back

Required By Date: 07/07/2020

Supplier/Customer Name: Abattoir 1

Contact Name: User 1 Abattoir ▼  
-- Select --  
-- Group Users --  
User 1 Abattoir  
Other  
Enter Email Address

**Send**

### Step 6: The status will revert to amber requires sign off & look like below



## Supplier Document Manager

Documents ← Received Documents **Exceptions** Sign Off Review Activity Overview Template Manager Admin

Currently viewing **All Sites** Document Exceptions Change

Viewing 2 results | Page 1 of 1

[New Exception](#) [Delete Selected](#)

<input type="checkbox"/>	Created By	Document	Date Range	Details	Status	
<input type="checkbox"/>	Steve Jones Demo Co	New Document	07 July 2020 to 07 August 2021	Please enter exception details here		
<input type="checkbox"/>	Steve Jones Demo Co	Raw Material Specifications	05 February 2019 to 05 March 2019	Please disregard points 1 and 2		

25 50 100 All | << first < prev next > last >>

**Step 7:** Once it has been signed off the status will look like this below

## Supplier Document Manager

Documents ← Received Documents **Exceptions** Sign Off Review Activity Overview Template Manager Admin

Currently viewing **All Sites** Document Exceptions Change

Viewing 2 results | Page 1 of 1

[New Exception](#) [Delete Selected](#)

<input type="checkbox"/>	Created By	Document	Date Range	Details	Status	
<input type="checkbox"/>	Steve Jones Demo Co	New Document	07 July 2020 to 07 August 2021	Please enter exception details here		
<input type="checkbox"/>	Steve Jones Demo Co	Raw Material Specifications	05 February 2019 to 05 March 2019	Please disregard points 1 and 2		

25 50 100 All | << first < prev next > last >>

## 8.2 EDIT AN EXCEPTION

**Step 1:** Go to *Exceptions*

## Supplier Document Manager

Documents ← Received Documents **Exceptions** Sign Off Review Activity Overview Template Manager Admin

Currently viewing **All Sites** Document Exceptions Change

Viewing 2 results | Page 1 of 1

[New Exception](#) [Delete Selected](#)

<input type="checkbox"/>	Created By	Document	Date Range	Details	Status	
<input type="checkbox"/>	Steve Jones Demo Co	New Document	07 July 2020 to 07 August 2021	Please enter exception details here		
<input type="checkbox"/>	Steve Jones Demo Co	Raw Material Specifications	05 February 2019 to 05 March 2019	Please disregard points 1 and 2		

25 50 100 All | << first < prev next > last >>

## Step 2: Select the edit button beside the exception you want to edit

**Supplier Document Manager**

Documents ← Received Documents **Exceptions** Sign Off Review Activity Overview Template Manager Admin

Currently viewing **All Sites** Document Exceptions Change Viewing 2 results | Page 1 of 1

[New Exception](#) [Delete Selected](#)

<input type="checkbox"/>	Created By	Document	Date Range	Details	Status	
<input type="checkbox"/>	Steve Jones Demo Co	New Document	07 July 2020 to 07 August 2021	Please enter exception details here	✓	<a href="#">Edit</a> <a href="#">Share Exception</a> <a href="#">View Shares</a>
<input type="checkbox"/>	Steve Jones Demo Co	Raw Material Specifications	05 February 2019 to 05 March 2019	Please disregard points 1 and 2	✓	

25 50 100 All | << first < prev next > last >>

## Step 3: Edit details, then select **Save & Send**

**Supplier Document Manager - Create Document Exception** [← Back](#)

Site

Document

Start Date

End Date

Exception Details

Sign-off Required ☒ Yes ☐ No

[Save](#)

[Save & Send](#)

[Save & Exit](#)

## Step 4: Select suppliers again then choose **Next**


**Supplier Document Manager - Share Exception** [← Back](#)

[Next](#)

<input type="checkbox"/>	Supplier/Customer	Supplier Name
<input type="checkbox"/>	Customer	Abattoir 1
<input checked="" type="checkbox"/>	Supplier	Abattoir 1
<input type="checkbox"/>	Customer	Abattoir 2
<input type="checkbox"/>	Supplier	Abattoir 2
<input type="checkbox"/>	Customer	Abattoir 3

**Step 5:** Then choose the required by date & user again. Once done select **Send**

**Supplier Document Manager - Share Exception** ← Back

Required By Date: 07/07/2020 

Supplier/Customer Name	Contact Name
Abattoir 1	<div> User 1 Abattoir -- Select -- -- Group Users -- <b>User 1 Abattoir</b> Other Enter Email Address </div>

Send

**Step 6:** The status will revert to Amber until signed off again

## 8.3 SHARE EXCEPTION

Sharing an exception allows you to send an exception to further suppliers

**Step 1:** Under **Exceptions** select the edit button beside the exception & then **Share Exception**

**Supplier Document Manager**

Documents ← Received Documents **Exceptions** → Sign Off Review → Activity Overview → Template Manager → Admin

Currently viewing: **All Sites** Document Exceptions Change Viewing 2 results | Page 1 of 1

New Exception Delete Selected

<input type="checkbox"/>	Created By	Document	Date Range	Details	Status	
<input type="checkbox"/>	Steve Jones Demo Co	New Document	07 July 2020 to 07 August 2021	Please enter exception details here	<span>✓</span>	<div> Edit <b>Share Exception</b> View Shares </div>
<input type="checkbox"/>	Steve Jones Demo Co	Raw Material Specifications	05 February 2019 to 05 March 2019	Please disregard points 1 and 2	<span>✓</span>	

25 50 100 All | << first < prev next > last >>

**Step 2:** From here follow the steps in edit an exception.

## 8.4 VIEW SHARES

To view who one document has been shared with use this function



**Step 1:** Under **Exceptions** select edit button beside the exception the choose **View Shares**

**Supplier Document Manager**

Documents ← Received Documents **Exceptions** Sign Off Review Activity Overview Template Manager Admin

Currently viewing **All Sites** Document Exceptions Change Viewing 2 results | Page 1 of 1

[New Exception](#) [Delete Selected](#)

<input type="checkbox"/>	Created By	Document	Date Range	Details	Status	
<input type="checkbox"/>	Steve Jones Demo Co	New Document	07 July 2020 to 07 August 2021	Please enter exception details here	✓	
<input type="checkbox"/>	Steve Jones Demo Co	Raw Material Specifications	05 February 2019 to 05 March 2019	Please disregard points 1 and 2	✓	

25 50 100 All | << first < prev next > last >>

- ☒ Edit
- ☒ Share Exception
- View Shares**

**Step 2:** View your shares in this modal. To close select X

**Document Exception Shares** ✕

Sent To	Date Shared	Required By	Sign Off Date	Status
User 1 Abattoir - (Abattoir 1)	07/07/2020	07/07/2020	07/07/2020	Signed Off - User 1 Abattoir

## 9. SIGN OFF REVIEW

The sign off review is where you summarise the suppliers status in relation to signing off documents.

### 9.1 VIEW SIGN OFF REVIEW

**Step 1:** Select **Sign Off Review** and scroll to view the suppliers and their status

**Supplier Document Manager**

Documents ← Received Documents Exceptions **Sign Off Review** Activity Overview Template Manager Admin

Site: Demo Co (Group) Document: All Supplier Type: All Supplier Status: All Compliance Status: All [Filter](#) [Clear Filters](#)

Summary (Based on current filters) [Export](#)

Total Shared	Total Signed Off	Total Sign Off Not Required	Total Sign Off Required	Total Re-Sign Off Required	Total Requires Review	Total Rejected	Suppliers Compliant	Suppliers Non-Compliant
33	87.88 %	0 %	6.06 %	0 %	0 %	2 (6.06 %)	21 (91.3 %)	2 (8.7 %)

Q Search...

Supplier	Shared	Signed Off	Sign Off Not Required	Sign Off Required	Re-Sign Off Required	Requires Review	Rejected	Status	
Abattoir 1	3	1	0	0	0	0	2	✗	<a href="#">View Shared</a>
Abattoir 2	3	1	0	2	0	0	0	✗	<a href="#">View Shared</a>
Abattoir 3	1	1	0	0	0	0	0	✓	<a href="#">View Shared</a>
Bakery Supplier	2	2	0	0	0	0	0	✓	<a href="#">View Shared</a>
Butter Supplier	1	1	0	0	0	0	0	✓	<a href="#">View Shared</a>
Cheese supplier	1	1	0	0	0	0	0	✓	<a href="#">View Shared</a>
Cleaning services	1	1	0	0	0	0	0	✓	<a href="#">View Shared</a>
Cold Store	2	2	0	0	0	0	0	✓	<a href="#">View Shared</a>
Dairy supplier	2	2	0	0	0	0	0	✓	<a href="#">View Shared</a>



## 9.2 VIEW THE SHARED DOCUMENTS WITH INDIVIDUAL SUPPLIERS

### Step 1: Select **View Shared** beside the supplier

**Supplier Document Manager**

Documents Received Documents Exceptions **Sign Off Review** Activity Overview Template Manager Admin

Site: Demo Co (Group) Document: All Supplier Type: All Supplier Status: All Compliance Status: All [Filter](#) [Clear Filters](#)

Summary (Based on current filters) [Export](#)

Total Shared	Total Signed Off	Total Sign Off Not Required	Total Sign Off Required	Total Re-Sign Off Required	Total Requires Review	Total Rejected	Suppliers Compliant	Suppliers Non-Compliant
31	90.32 %	0 %	3.23 %	0 %	3.23 %	1 (3.23 %)	21 (91.3 %)	2 (8.7 %)

Q Search...

Supplier	Shared	Signed Off	Sign Off Not Required	Sign Off Required	Re-Sign Off Required	Requires Review	Rejected	Status	
Abattoir 1	2	0	0	0	0	1	1	✘	<a href="#">View Shared</a>
Abattoir 2	2	1	0	1	0	0	0	✘	<a href="#">View Shared</a>

### Step 2: Here you can view the shared docs and their status

**Supplier Document Manager**

Documents Received Documents Exceptions **Sign Off Review** Activity Overview Template Manager Admin

Site: Demo Co (Group) [Back](#)

Supplier: Abattoir 1

[Recall Selected Documents](#) [Change Recipient Of Shares](#) [Export](#)

<input type="checkbox"/>	Share Date	Document Name	Shared With	Status	Renewal Date	
<input type="checkbox"/>	07/07/2020	Technical Conditions of supply ingredients	User 1 Abattoir	Rejected By Receiver		
<input type="checkbox"/>	20/07/2020	New doc 3	User 1 Abattoir	Requires Review	20/07/2021	

## 9.3 REQUIRES REVIEW & SIGN OFF

As you can see from the Sign off review that one doc requires review. This is because you setup custom sign off fields & comments need reviewed and sign off when a supplier submits.

Supplier Document Manager

Documents

← Received Documents

⌚ Exceptions

**✔ Sign Off Review**

☰ Activity Overview

📄 Template Manager

🔧 Admin

Site

Document

Supplier Type

Supplier Status

Compliance Status

Filter

Clear Filters

Summary (Based on current filters)

📄 Export

Total Shared	Total Signed Off	Total Sign Off Not Required	Total Sign Off Required	Total Re-Sign Off Required	Total Requires Review	Total Rejected	Suppliers Compliant	Suppliers Non-Compliant
31	90.32 %	0 %	3.23 %	0 %	3.23 %	1 (3.23 %)	21 (91.3 %)	2 (8.7 %)

🔍

Search...

Supplier	Shared	Signed Off	Sign Off Not Required	Sign Off Required	Re-Sign Off Required	Requires Review	Rejected	Status	
Abattoir 1	2	0	0	0	0	1	1	✖	<div>View Shared</div>
Abattoir 2	2	1	0	1	0	0	0	✖	<div>View Shared</div>

And as you can see here when you click on that supplier, it **Requires Review**.

Supplier Document Manager					
Documents	← Received Documents	⊙ Exceptions	✔ Sign Off Review	☰ Activity Overview	📄 Template Manager
					Admin
Site: Demo Co (Group)					Back
Supplier: Abattoir 1					
Recall Selected Documents					Change Recipient Of Shares
					Export
<input type="checkbox"/>	Share Date	Document Name	Shared With	Status	Renewal Date
<input type="checkbox"/>	07/07/2020	Technical Conditions of supply ingredients	User 1 Abattoir	Rejected By Receiver	
<input type="checkbox"/>	20/07/2020	New doc 3	User 1 Abattoir	Requires Review	20/07/2021

## Step 1: Select view shared beside the supplier that *Requires Review*

**Supplier Document Manager**

Documents Received Documents Exceptions **Sign Off Review** Activity Overview Template Manager Admin

Site: Demo Co (Group) Document: All Supplier Type: All Supplier Status: All Compliance Status: All [Filter](#) [Clear Filters](#)

Summary (Based on current filters) [Export](#)

Total Shared	Total Signed Off	Total Sign Off Not Required	Total Sign Off Required	Total Re-Sign Off Required	Total Requires Review	Total Rejected	Suppliers Compliant	Suppliers Non-Compliant
31	90.32 %	0 %	3.23 %	0 %	3.23 %	1 (3.23 %)	21 (91.3 %)	2 (8.7 %)

Search...

Supplier	Shared	Signed Off	Sign Off Not Required	Sign Off Required	Re-Sign Off Required	Requires Review	Rejected	Status	
Abattoir 1	2	0	0	0	0	1	1	✘	<a href="#">View Shared</a>
Abattoir 2	2	1	0	1	0	0	0	✘	<a href="#">View Shared</a>

## Step 2: Then select the eye icon beside the doc that requires review

**Supplier Document Manager**

Documents Received Documents Exceptions **Sign Off Review** Activity Overview Template Manager Admin

Site: Demo Co (Group)  
Supplier: Abattoir 1 [Back](#)

[Recall Selected Documents](#) [Change Recipient Of Shares](#) [Export](#)

<input type="checkbox"/>	Share Date	Document Name	Shared With	Status	Renewal Date	
<input type="checkbox"/>	07/07/2020	Technical Conditions of supply ingredients	User 1 Abattoir	Rejected By Receiver		
<input type="checkbox"/>	20/07/2020	New doc 3	User 1 Abattoir	Requires Review	20/07/2021	<a href="#">View</a>

## Step 3: Review comments

**Sign Off Comment** [X](#)

**Info** If the supplier comment is **approved**, the document will be automatically signed off.  
If the supplier comment is **declined**, you must provide a decline comment. The supplier will receive a notification and will be required to sign off the document again.

**Supplier Comment** Our additional comments

**Approve/Decline Comment**

[Cancel](#) [Decline Comment](#) [Approve Comment](#)

### 9.3.1 DECLINE REQUIRES REVIEW COMMENTS

Here you can decline the comments made by the supplier when they signed off

**Step 1:** Select the eye icon beside the doc that requires review

Supplier Document Manager

Documents

← Received Documents

⌛ Exceptions

📄 Sign Off Review

📅 Activity Overview

📄 Template Manager

🔧 Admin

Site: Demo Co (Group)

Supplier: Abattoir 1

Recall Selected Documents

Change Recipient Of Shares

Export

<input type="checkbox"/>	Share Date	Document Name	Shared With	Status	Renewal Date	
<input type="checkbox"/>	07/07/2020	Technical Conditions of supply ingredients	User 1 Abattoir	Rejected By Receiver		
<input type="checkbox"/>	20/07/2020	New doc 3	User 1 Abattoir	Requires Review	20/07/2021	<div><div>👁️⚠️</div><div>📘</div></div>

**Step 2:** Add your comments then select **Decline Comment**

Sign Off Comment

If the supplier comment is **approved**, the document will be automatically signed off.

If the supplier comment is **declined**, you must provide a decline comment. The supplier will receive a notification and will be required to sign off the document again.

Supplier Comment

Our additional comments

Approve/Decline Comment

We decline these additional comments. Please explain

Cancel

Decline Comment

Approve Comment

**Step 3:** If you decline the status reverts to sign off required. This reverts back to the supplier for them to review the comments made in reply and sign off again.

## Supplier Document Manager

Documents Received Documents Exceptions **Sign Off Review** Activity Overview Template Manager Admin

Site: Demo Co (Group)

Supplier: Abattoir 1

Back

Recall Selected Documents

Change Recipient Of Shares

Export

<input type="checkbox"/>	Share Date	Document Name	Shared With	Status	Renewal Date	
<input type="checkbox"/>	07/07/2020	Technical Conditions of supply ingredients	User 1 Abattoir	Rejected By Receiver		
<input type="checkbox"/>	20/07/2020	New doc 3	User 1 Abattoir	Sign Off Required - 03/08/2020		

## 9.3.2 APPROVE REQUIRES REVIEW COMMENTS

If you agree with the comments made by the supplier then follow these steps

**Step 1:** Select the eye icon beside the doc that requires review

## Supplier Document Manager

Documents Received Documents Exceptions **Sign Off Review** Activity Overview Template Manager Admin

Site: Demo Co (Group)

Supplier: Abattoir 1

Back

Recall Selected Documents

Change Recipient Of Shares

Export

<input type="checkbox"/>	Share Date	Document Name	Shared With	Status	Renewal Date	
<input type="checkbox"/>	07/07/2020	Technical Conditions of supply ingredients	User 1 Abattoir	Rejected By Receiver		
<input type="checkbox"/>	20/07/2020	New doc 3	User 1 Abattoir	Requires Review	20/07/2021	

**Step 2:** Select *Approve Comment*

Sign Off Comment

If the supplier comment is **approved**, the document will be automatically signed off.  
If the supplier comment is **declined**, you must provide a decline comment. The supplier will receive a notification and will be required to sign off the document again.

Supplier Comment

Our additional comments

Approve/Decline Comment

We approve these comments

Cancel

Decline Comment

Approve Comment



### Step 3: The status then reverts to *Signed off*

**Supplier Document Manager**

Documents ← Received Documents Exceptions **Sign Off Review** Activity Overview Template Manager Admin

Site: Demo Co (Group) Back

Supplier: Abattoir 1

Recall Selected Documents Change Recipient Of Shares Export

<input type="checkbox"/>	Share Date	Document Name	Shared With	Status	Renewal Date
<input type="checkbox"/>	07/07/2020	Technical Conditions of supply ingredients	User 1 Abattoir	Rejected By Receiver	
<input type="checkbox"/>	20/07/2020	New doc 3	User 1 Abattoir	Signed Off User 1 Abattoir (20/07/2020)	20/07/2021

## 9.4 RECALL SELECTED DOCUMENTS

### Step 1: Under *Sign off Review*, select *View Shared*

**Supplier Document Manager**

Documents ← Received Documents Exceptions **Sign Off Review** Activity Overview Template Manager Admin

Site: Demo Co (Group) Document: All Supplier Type: All Supplier Status: All Compliance Status: All Filter Clear Filters

Summary (Based on current filters) Export

Total Shared	Total Signed Off	Total Sign Off Not Required	Total Sign Off Required	Total Re-Sign Off Required	Total Requires Review	Total Rejected	Suppliers Compliant	Suppliers Non-Compliant
33	87.88 %	0 %	6.06 %	0 %	0 %	2 (6.06 %)	21 (91.3 %)	2 (8.7 %)

Search...

Supplier	Shared	Signed Off	Sign Off Not Required	Sign Off Required	Re-Sign Off Required	Requires Review	Rejected	Status	
Abattoir 1	3	1	0	0	0	0	2	✗	<span>View Shared</span>
Abattoir 2	3	1	0	2	0	0	0	✗	<span>View Shared</span>

### Step 2: Select the document, then choose *Recall Selected Documents*

**Supplier Document Manager**

Documents ← Received Documents Exceptions **Sign Off Review** Activity Overview Template Manager Admin

Site: Demo Co (Group) Back

Supplier: Abattoir 1

Recall Selected Documents Change Recipient Of Shares Export

<input type="checkbox"/>	Share Date	Document Name	Shared With	Status	Renewal Date
<input checked="" type="checkbox"/>	07/06/2019	Technical Conditions of Supply	User 1 Abattoir	Signed Off User 1 Abattoir (05/08/2019)	04/08/2020
<input type="checkbox"/>	07/07/2020	New Document	User 1 Abattoir	Rejected By Receiver User 1 Abattoir (07/07/2020)	07/07/2021

### Step 3: The document is now recalled and table will show this doc removed

## 9.5 CHANGE THE RECIPIENT OF SHARES

**Step 1:** Under *Sign off Review* choose *View Shared*

**Supplier Document Manager**

Documents ← Received Documents Exceptions **Sign Off Review** Activity Overview Template Manager Admin

Site: Demo Co (Group) Document: All Supplier Type: All Supplier Status: All Compliance Status: All [Filter](#) [Clear Filters](#)

Summary (Based on current filters) [Export](#)

Total Shared	Total Signed Off	Total Sign Off Not Required	Total Sign Off Required	Total Re-Sign Off Required	Total Requires Review	Total Rejected	Suppliers Compliant	Suppliers Non-Compliant
33	87.88 %	0 %	6.06 %	0 %	0 %	2 (6.06 %)	21 (91.3 %)	2 (8.7 %)

Search...

Supplier	Shared	Signed Off	Sign Off Not Required	Sign Off Required	Re-Sign Off Required	Requires Review	Rejected	Status	
Abattoir 1	3	1	0	0	0	0	2	✗	<a href="#">View Shared</a>
Abattoir 2	3	1	0	2	0	0	0	✗	<a href="#">View Shared</a>

**Step 2:** Select the document you want to change the recipient of

**Supplier Document Manager**

Documents ← Received Documents Exceptions **Sign Off Review** Activity Overview Template Manager Admin

Site: Demo Co (Group) Supplier: Abattoir 1 [Back](#)

Recall Selected Documents **Change Recipient Of Shares** [Export](#)

<input type="checkbox"/>	Share Date	Document Name	Shared With	Status	Renewal Date
<input checked="" type="checkbox"/>	07/07/2020	New Document	User 1 Abattoir	Rejected By Receiver User 1 Abattoir (07/07/2020)	07/07/2021
<input type="checkbox"/>	07/07/2020	Technical Conditions of supply ingredients	User 1 Abattoir	Rejected By Receiver	

**Step 3:** Choose the new recipient & select *Save*

**Select User**

User 1 Abattoir ▼

-- Select --

-- Group Users --

User 1 Abattoir

[Close](#) [Save](#)

**Step 4:** The recipient has now been changed and when the document is due for renewal sign off the new recipient will have to sign off

## 10.VIEWING A CUSTOMER DOCUMENT

**Step 1:** Sign in and go to **My Tasks**, you will see a task to **shared document (Sign off Req)**. Or you can go to the **Received Supplier Documents** under Supplier Approval.


Home

Interactive Dashboards


Latest News

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**It would require a 'monumental shift' for sustainability to top the corporate agenda**  
Significant commitments on issues like food waste or plastic pollution would suggest that sustainability is moving up the corporate priority list. However, with consumer sentiment sliding and upward pricing pressure on the horizon, it would require a "monumental shift" for sustainability to continue its ascent in the boardroom.



**Experts weigh in on digestive health in Kerry Health and Nutrition Institute webinar**  
Gut health is becoming increasingly popular among consumers. In this wide-ranging health area, the gut-brain axis (GBA) is a key area of interest, along with the sort of probiotic bacteria that aid wider gut health, Dairy & Food Culture Technologies Consultant, Dr. Mary Ellen Sanders, tells NutritionInsight.



**The Beyond Burger finally goes on sale in Tesco**  
US-based alternative protein business Beyond Meat has revealed its Beyond Burger is now available to purchase at UK retailer Tesco, following a lengthy delay.

My Tasks

231 outstanding

Steve Jones shared a Document (Sign Off Req.)

Steve Jones shared a Document (Sign Off Req.)

Steve Jones requires supply chain details for 'Demo Co (Group)'

Steve Jones sent you a Purchasing Enquiry

An order requires confirmation note

View All Tasks

or

### Supplier Document Manager

Documents

← Received Documents

Exceptions

Activity Overview

Received Between

Shared With (Site)

All

Rec'd From (Company)

All

Search

Search...

Filter

Clear Filters

Shared With (User)

All

Status

All

Viewing 3 results | Page 1 of 1

25 50 100 All << first < previous next > last >>

Delete/Reject Selected

View Selected

Sign Off Selected

Compare Selected

Assign Responsibility

Viewing 3 results | Page 1 of 1

	Rec'd Date	Document Name	Shared With	Shared By	Last Updated	Status	Renewal Date	
<input type="checkbox"/>	07/07/2020	New Document	User 1 Abattoir Abattoir 1	Steve Jones - Demo Co	06/07/2020	Sign Off Required - 21/07/2020		View Details Sign Off
<input type="checkbox"/>	07/07/2020	Technical Conditions of supply ingredients	User 1 Abattoir Abattoir 1	Steve Jones - Demo Co	30/03/2020	Sign Off Required - 21/07/2020		View Details Sign Off
<input type="checkbox"/>	07/06/2019	Technical Conditions of Supply	User 1 Abattoir Abattoir 1	Steve Jones - Demo Co	17/06/2019	Signed Off	04/08/2020	View Details

## Step 2: Select *view*

### Supplier Document Manager

Documents ← **Received Documents** Exceptions Activity Overview

Received Between:

Shared With (Site):

Shared With (User):

Rec'd From (Company):

Status:

Search:

[Filter](#) [Clear Filters](#)

Viewing 3 results | Page 1 of 1

25 50 100 **All** | << first < previous next > last >>

[Delete/Reject Selected](#) [View Selected](#) [Sign Off Selected](#) [Compare Selected](#) [Assign Responsibility](#)

Viewing 3 results | Page 1 of 1

<input type="checkbox"/>	Rec'd Date	Document Name	Shared With	Shared By	Last Updated	Status	Renewal Date	
<input type="checkbox"/>	07/07/2020	New Document	User 1 Abattoir Abattoir 1	Steve Jones - Demo Co	06/07/2020	Sign Off Required - 21/07/2020		<a href="#">View</a> <a href="#">Details</a> <a href="#">Sign Off</a>

## Step 3: View document in full, once done select *Close*

[Close](#) [Hide Updates History](#) [Export to PDF](#)

**New Template**

Document: New Document

Version: 1 (06/07/2020)

**Part 1**

Clause 1.1 Info

**Updates History**

Date	Update By	Update Description
06/07/2020	Eric Knowles	Updated the status to Completed & Approved
06/07/2020	Eric Knowles	Approved the Document
06/07/2020	Steve Jones	Updated the status to Approval Required
06/07/2020	Steve Jones	Updated the status to In Progress
06/07/2020	Steve Jones	Updated the status to Approval Required
06/07/2020	Steve Jones	Created Document

## 11.SIGN OFF THE DOCUMENT

Once you have done reviewing & reading you now need to sign off

**Step 1:** Once there select *Sign Off*

Supplier Document Manager

Documents
Received Documents
Exceptions
Activity Overview

Received Between

Shared With (Site)

All

Rec'd From (Company)

All

Search

Search...

Filter

Clear Filters

Shared With (User)

All

Status

All

Viewing 3 results | Page 1 of 1

25
50
100
All
<< first
< previous
next >
last >>

Delete/Reject Selected
View Selected
Sign Off Selected
Compare Selected
Assign Responsibility

Viewing 3 results | Page 1 of 1

	Rec'd Date	Document Name	Shared With	Shared By	Last Updated	Status	Renewal Date	
<input type="checkbox"/>	07/07/2020	New Document	User 1 Abattoir Abattoir 1	Steve Jones - Demo Co	06/07/2020	Sign Off Required - 21/07/2020		View Details Sign Off

**Step 2:** You can **Add a Comment** to the sign off here & once done select **Sign Off**

Sign Off Document

Sign Off Details

Add Comment (Optional)

Please review the Document details below and read the declaration provided by before clicking 'Sign Off'.

Please fill in required fields if any are present.

You may also add a comment to include any notes, issues, etc.

Company

Demo Co

Document

New Document

Sign Off Type

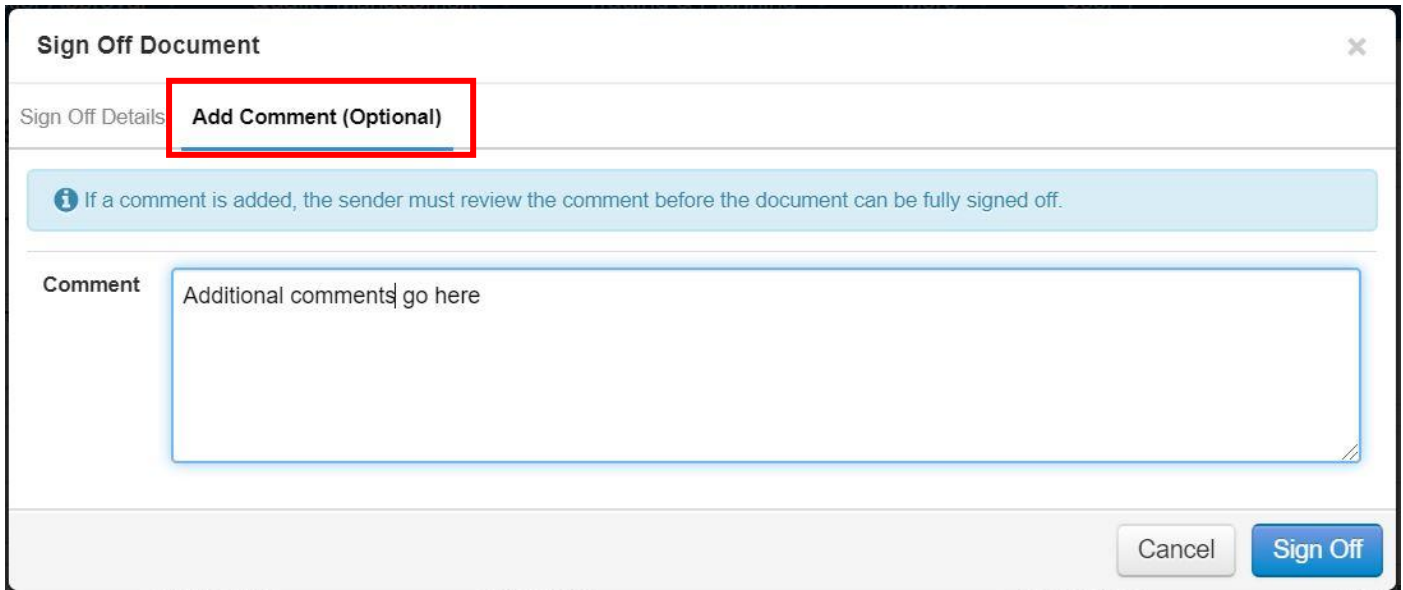
Yearly

By signing off on this document you agreed that....

Cancel

Sign Off

Additional comments are added in this area. If you add additional comments, they will need signed off by the customer



**Sign Off Document** [X]

Sign Off Details **Add Comment (Optional)**

*i* If a comment is added, the sender must review the comment before the document can be fully signed off.

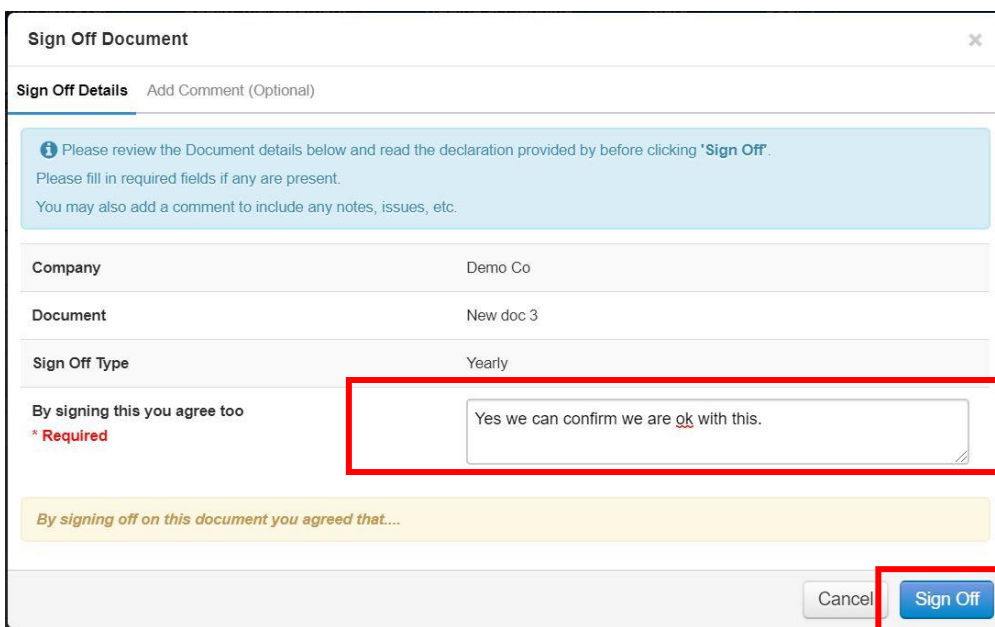
**Comment**

Additional comments go here

Cancel Sign Off

Or

If the customer has setup further declarations or questions that need answered the box above will look like this below then select **Sign off**



**Sign Off Document** [X]

**Sign Off Details** Add Comment (Optional)

*i* Please review the Document details below and read the declaration provided by before clicking 'Sign Off'.  
Please fill in required fields if any are present.  
You may also add a comment to include any notes, issues, etc.

Company	Demo Co
Document	New doc 3
Sign Off Type	Yearly

By signing this you agree too  
**\* Required**

Yes we can confirm we are ok with this.

By signing off on this document you agreed that...

Cancel Sign Off



**Step 3:** Once complete the status reverts to **Signed Off**. And you can see the renewal sign off beside it.

**Supplier Document Manager**

Documents ← **Received Documents** Exceptions Activity Overview

Successfully signed off the document

Received Between:   Shared With (Site): All Shared With (User): All Rec'd From (Company): All Status: All Search:  Filter Clear Filters

Viewing 3 results | Page 1 of 1 25 50 100 All | << first < previous next > last >>

Delete/Reject Selected View Selected **Sign Off Selected** Compare Selected Assign Responsibility Viewing 3 results | Page 1 of 1

Rec'd Date	Document Name	Shared With	Shared By	Last Updated	Status	Renewal Date	
07/07/2020	Technical Conditions of supply ingredients	User 1 Abattoir Abattoir 1	Steve Jones - Demo Co	30/03/2020	Sign Off Required - 21/07/2020		View Details Sign Off
07/07/2020	New Document	User 1 Abattoir Abattoir 1	Steve Jones - Demo Co	06/07/2020	<b>Signed Off</b>	07/07/2021	View Details

Or

If the customer has used the further declarations or questions the status will revert to **Awaiting Sender Review**

**Supplier Document Manager**

Documents ← **Received Documents** Exceptions Activity Overview

Successfully signed off the document

Received Between:   Shared With (Site): All Shared With (User): All Rec'd From (Company): All Status: All Search:  Filter Clear Filters

Viewing 1 results | Page 1 of 1 25 50 100 All | << first < previous next > last >>

Delete/Reject Selected View Selected **Sign Off Selected** Compare Selected Assign Responsibility Viewing 1 results | Page 1 of 1

Rec'd Date	Document Name	Shared With	Shared By	Last Updated	Status	Renewal Date	
20/07/2020	New doc 3	User 1 Abattoir Abattoir 1	Steve Jones - Demo Co	20/07/2020	<b>Awaiting Sender Review</b>	20/07/2021	View Details

25 50 100 All | << first < previous next > last >>

**Step 4:** Once this has been reviewed and signed off by the customer the status will revert to **Signed Off** as above

## 11.1 SIGN OFF APPROVED

So as we have said above if you add an additional comments these may need signed off sometime.

**Step 1:** Once signed the status will revert to *Signed off*

**Supplier Document Manager**

Documents ← **Received Documents** Exceptions Activity Overview

Successfully signed off the document

Received Between:   Shared With (Site): All Shared With (User): All Rec'd From (Company): All Status: All Search:  Filter Clear Filters

Viewing 1 results | Page 1 of 1 25 50 100 All << first < previous next > last >>

Delete/Reject Selected View Selected Sign Off Selected Compare Selected Assign Responsibility Viewing 1 results | Page 1 of 1

Rec'd Date	Document Name	Shared With	Shared By	Last Updated	Status	Renewal Date	
20/07/2020	New doc 3	User 1 Abattoir Abattoir 1	Steve Jones - Demo Co	20/07/2020	Signed Off	20/07/2021	View Details

25 50 100 All << first < previous next > last >>

## 11.2 SIGN OFF DECLINED

So if your sign off comments have been declined by the customer follow these steps below. You will get a notification like this below in your task manager.

**Step 1:** Select the link below or go to Received documents in Received Supplier Documents

**Home** Interactive Dashboards

Latest News « Previous Next »

**It would require a 'monumental shift' for sustainability to top the corporate agenda**  
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**My Tasks** 236 outstanding

- Steve Jones declined a Document Sign Off Comment (Re-sign Off Req.)
- Steve Jones shared a Document (Sign-Off Req.)
- Steve Jones sent you a Purchasing Enquiry

## Step 2: Now select *Sign Off* again

**Supplier Document Manager**

Documents ← **Received Documents** Exceptions Activity Overview

Received Between:    
 Shared With (Site): All  
 Shared With (User): All  
 Rec'd From (Company): All  
 Status: All  
 Search:

Viewing 1 results | Page 1 of 1

Viewing 1 results | Page 1 of 1

Rec'd Date	Document Name	Shared With	Shared By	Last Updated	Status	Renewal Date	
20/07/2020	New doc 3	User 1 Abattoir Abattoir 1	Steve Jones - Demo Co	20/07/2020	Sign Off Required - 03/08/2020		<input type="button" value="View"/> <input type="button" value="Details"/> <input checked="" type="button" value="Sign Off"/>

25 50 100 All | << first < previous next > last >>

## Step 3: Now select *Sign Off*

**Sign Off Document**

**Sign Off Details** Add Comment (Optional)

**Please review the Document details below and read the declaration provided by before clicking 'Sign Off'.**  
 Please fill in required fields if any are present.  
 You may also add a comment to include any notes, issues, etc.

**Company** Demo Co

**Document** New doc 3

**Sign Off Type** Yearly

**By signing this you agree too**  
 \* **Required**

*By signing off on this document you agreed that....*

## Step 4: The status now reverts to *Signed Off*

**Supplier Document Manager**

Documents ← **Received Documents** Exceptions Activity Overview

Successfully signed off the document

Received Between:   Shared With (Site): All Shared With (User): All Rec'd From (Company): All Status: All Search:  Filter Clear Filters

Viewing 1 results | Page 1 of 1 25 50 100 All | << first < previous next > last >>

Delete/Reject Selected View Selected **Sign Off Selected** Compare Selected Assign Responsibility Viewing 1 results | Page 1 of 1

	Rec'd Date	Document Name	Shared With	Shared By	Last Updated	Status	Renewal Date	
<input type="checkbox"/>	20/07/2020	New doc 3	User 1 Abattoir Abattoir 1	Steve Jones - Demo Co	20/07/2020	Signed Off	20/07/2021	View Details

25 50 100 All | << first < previous next > last >>

## 12.ASSIGN RESPONSIBILITY

You can use this feature if someone else with your business should sign off this document.

### Step 1: Select the document then select *Assign Responsibility*

**Supplier Document Manager**

Documents ← **Received Documents** Exceptions Activity Overview

Successfully signed off the document

Received Between:   Shared With (Site): All Shared With (User): All Rec'd From (Company): All Status: All Search:  Filter Clear Filters

Viewing 3 results | Page 1 of 1 25 50 100 All | << first < previous next > last >>

Delete/Reject Selected View Selected **Sign Off Selected** Compare Selected **Assign Responsibility** Viewing 3 results | Page 1 of 1

	Rec'd Date	Document Name	Shared With	Shared By	Last Updated	Status	Renewal Date	
<input checked="" type="checkbox"/>	07/07/2020	Technical Conditions of supply ingredients	User 1 Abattoir Abattoir 1	Steve Jones - Demo Co	30/03/2020	Sign Off Required - 21/07/2020		View Details Sign Off

### Step 2: Select a new recipient then choose *Select*. This user then gets a notification to sign off

**Assign Responsibility** ✕

Select User:

Close **Select**

### 13.DELETE/REJECT SELECTED

If in the case that you want to delete this document or reject it. Use this feature

**Step 1:** Select the document to reject, then select *Delete/Reject Selected*

**Supplier Document Manager**

Documents ← **Received Documents** Exceptions Activity Overview

Successfully signed off the document

Received Between:

Shared With (Site):

Shared With (User):

Rec'd From (Company):

Status:

Search:

Viewing 3 results | Page 1 of 1

25 50 100 All | << first < previous next > last >>

Viewing 3 results | Page 1 of 1

<input type="checkbox"/>	Rec'd Date	Document Name	Shared With	Shared By	Last Updated	Status	Renewal Date	
<input checked="" type="checkbox"/>	07/07/2020	Technical Conditions of supply ingredients	User 1 Abattoir Abattoir 1	Steve Jones - Demo Co	30/03/2020	Sign Off Required - 21/07/2020		<input type="button" value="View"/> <input type="button" value="Details"/> <input type="button" value="Sign Off"/>

**Step 2:** Enter in a comment then select *Confirm*

**Add Note/Comment**

Enter note/comment... (optional)

## 14.VIEW SELECTED

You can view several documents on one pane with this feature

**Step 1:** Select the documents to view, then choose **View Selected**

**Supplier Document Manager**

Documents ← **Received Documents** Exceptions Activity Overview

Successfully signed off the document

Received Between:   Shared With (Site): All Shared With (User): All Rec'd From (Company): All Status: All Search:  Filter Clear Filters

Viewing 2 results | Page 1 of 1 25 50 100 All | << first < previous next > last >>

	Rec'd Date	Document Name	Shared With	Shared By	Last Updated	Status	Renewal Date	
<input checked="" type="checkbox"/>	07/07/2020	New Document	User 1 Abattoir Abattoir 1	Steve Jones - Demo Co	06/07/2020	Signed Off	07/07/2021	<input type="button" value="View"/> <input type="button" value="Details"/>
<input checked="" type="checkbox"/>	07/06/2019	Technical Conditions of Supply	User 1 Abattoir Abattoir 1	Steve Jones - Demo Co	17/06/2019	Signed Off	04/08/2020	<input type="button" value="View"/> <input type="button" value="Details"/>

**Step 2:** View the docs and when done select **Back**

Viewing 2 documents

**New Template**

Document: New Document

Version: 1 (06/07/2020)

**Policy Statement**

- 1.1 It is the policy of Demo Co and its subsidiary Companies\* to purchase from reputable and approved raw material suppliers who operate good manufacturing practices, who are able to consistently meet our technical conditions of supply and who can demonstrate compliance with all relevant United Kingdom / EU legislation (as applicable) and associated codes of practice.
- 1.2 Each supplier will be provided with a copy of the Technical Conditions of Supply at commencement of supply. To support our due diligence each supplier will be asked to accept the document on the Foods Connected website. Updates to Technical Conditions of Supply may be issued to our suppliers at any time of the year but normally at their review.
- 1.3 It is the policy of Demo Co to work with our suppliers in order to ensure that the standards laid down within this Technical Conditions and Supply document are achieved.
- 1.4 Compliance with the Demo Co Technical Conditions of Supply does not absolve suppliers from their legal obligations relating to food safety, legality or quality of the goods supplied.
- 1.5 In accordance with the Sale of Goods Act all goods supplied to Demo Co are supplied under a contract of sale and NOT supplied under a contract for sale by sample.
- 1.6 All commercial contracts and dealings with Demo Co and its subsidiary companies shall be carried out in full compliance with the requirements of the UK Bribery Act 2010.
- 1.7 Accepting the document on / via Foods Connected will be classed as evidence of supplier compliance with requirements of Demo Co Technical Conditions of Supply.
- 1.8 Any queries regarding the Technical Conditions of Supply should be relayed to the following address:
- 1.9 Group Technical Services Department  
Demo Co



## 15. RECEIVING & VIEWING AN EXCEPTION

A customer can grant you an exception on a document that may or may not need signed off. Follow these steps to do so.

**Step 1:** Sign in and go to **My Tasks**, you will see a task to **document exception (Sign off Req)**. Or you can go to the **Received Supplier Documents** then **Exceptions** tab under Supplier Approval.

The screenshot shows the 'Home' dashboard. On the right, the 'My Tasks' section displays a list of tasks. The first task, 'Steve Jones sent you a document exception. (Sign Off Required)', is highlighted with a red box. Other tasks include 'Steve Jones shared a Document. (Sign Off Req.)', 'Steve Jones requires supply chain details for 'Demo Co (Group)', 'Steve Jones sent you a Purchasing Enquiry', and 'An order requires confirmation note'.

Or

The screenshot shows the 'Supplier Document Manager' interface. The 'Exceptions' tab is highlighted with a red box. Below the tabs, there is a table with one row showing a document exception for 'Steve Jones Demo Co'. The table has columns for 'Created By', 'Document', 'Date Range', 'Details', and 'Status'.

Created By	Document	Date Range	Details	Status
Steve Jones Demo Co	New Document	07 July 2020 to 07 August 2021	Please see exception details here	✖

**Step 2:** To view select **View**

The screenshot shows the 'Supplier Document Manager' interface. The 'Exceptions' tab is highlighted. Below the tabs, there is a table with one row showing a document exception for 'Steve Jones Demo Co'. The 'View' button is highlighted with a red box.

Created By	Document	Date Range	Details	Status
Steve Jones Demo Co	New Document	07 July 2020 to 07 August 2021	Please see exception details here	✖

**Step 3:** View details, once done close by selecting X

Document Exception Shares				
Sent To	Date Shared	Required By	Sign Off Date	Status
User 1 Abattoir - (Abattoir 1)	07/07/2020	07/07/2020		Sign Off Required

**Step 4:** Now select again, then choose *Sign Off*

Documents

← Received Documents

Exceptions

≡ Activity Overview

Currently viewing

All Sites

Document Exceptions

Change

Viewing 1 results | Page 1 of 1

<input type="checkbox"/>	Created By	Document	Date Range	Details	Status
<input type="checkbox"/>	Steve Jones Demo Co	New Document	07 July 2020 to 07 August 2021	Please see exception details here	<div><div>X</div><div></div></div>

2550100All|<<first<prevnext>>

View

Sign Off

**Step 5:** Review & then select *Sign Off*

Sign Off Exception	
Created By	Steve Jones (Demo Co)
Document	New Document
Dates	07/07/2020 - 07/08/2021
Exception Details	Please see exception details here
<div>Close</div> <div>Sign Off</div>	

## Step 6: The status will now revert to green

### Supplier Document Manager

Documents ← Received Documents **Exceptions** Activity Overview

Currently viewing **All Sites** Document Exceptions [Change](#)

Viewing 1 results | Page 1 of 1

<input type="checkbox"/>	Created By	Document	Date Range	Details	Status	
<input type="checkbox"/>	Steve Jones Demo Co	New Document	07 July 2020 to 07 August 2021	Please see exception details here	<div><div></div></div>	

25 50 100 All | << first < prev next > last >>