

# TOOL OVERVIEW

## PRODUCT CHECKMANAGER



### TOOL SUMMARY

Our Product Check Manager tool enables you to carry out comprehensive product checks in a format that is clear and user friendly. Using our customisable form builder, you can combine standard form fields with pre-set fields, which enable you to use standardised field options, making it simpler to create and record product checks as well as improving your reporting ability.

As product checks are stored in one central platform there is no duplication of work and you can be certain that the relevant company team members are all viewing the same supplier product check and response. Fully tracked update history allows for better accountability and transparency of changes made by both the customer and supplier users.

Our reporting functionality helps you to analyse and compare the data recorded in your suppliers' product checks and the customisable charts in our dashboards provide a summarised overview of the information that is of key importance to you.

### KEY FUNCTIONALITY

Our Product Check Manager has many features, the table below highlights the main actions you will be able to undertake using this tool and describes how each functionality is utilised within the system.

#### FORM BUILDER

Create supplier product checks using numerous different customisable field types within our form builder, including pre-set fields which allow you to create a field with standardised options to prevent the creation of the field multiple times and to improve reporting ability.

#### EMAIL ALERTS

Set up automatic email alerts to send notifications to the relevant users based on field options selected within the product check.

#### SCORING CRITERIA

Scoring criteria can be used to give product checks a score based on the details recorded. These can be labelled and colour-coded according to your company ratings.

#### CHECK SUMMARY

Quickly summarise the status of product checks in a table, showing who a product check was completed by, when it was completed, what the current completion status is along with the details of the site, supplier and product.



## COLOUR CODED STATUSES

## UPDATES HISTORY

## UPDATES HISTORY

## REPORTING

## DASHBOARDS

Colour coded completion statuses immediately give you an overview of which product checks are in progress, require your action or are closed.

All changes made to the product check template or a product check form are tracked with details of the date and time as well as who made the change, allowing for full transparency and accountability of updates.

All changes made to the customer issue template or a customer issue are tracked with details of the date and time as well as who made the change, allowing for full transparency and accountability of updates.

Reporting can be carried out on the product checks. Utilise our comparison reports to contrast different product check details or our snapshot reports to analyse product check data with summary charts; both types can be exported to PDF or Excel.

Create fully customisable dashboards utilising chart widgets from your created reports and share them with all relevant users.

## KEY BENEFITS

The Product Check Manager provides several key benefits for recording product information on Foods Connected, they are detailed below.

### BENEFIT

### DETAILS

#### CUSTOMISABLE

Our form builder for creating product checks has multiple different customisable field types allowing you to include pre-set fields with custom options based on your company's requirements.

## AUTOMATIC SCORING

Set up scoring within your product check template based on your company's scoring criteria and when product checks are completed their score is automatically calculated, removing the necessity for complicated spreadsheets and calculations. These scorings can also be colour coded meaning you can easily review product check ratings at a glance.

## AUTOMATIC EMAIL ALERTS

When you have email alerts set up, relevant users will receive email notifications based on selected field options within the product check. This ensures users are kept up-to-date with the information which is of key importance to them.

## REPORTING

Using our straight-forward reporting functionality you can compare product check details or create snapshots to analyse product check data, combining the information into an easy-to-view summary dashboard which can be shared with all relevant users.

## INTERACTION WITH OTHER TOOLS

Our platform is interactive meaning information can flow between tools enabling your processes to work cooperatively together all on the same system. The tools that can integrate and work together with the Product Check Manager are described below.

### TOOL

### DETAILS

#### SUPPLIER MANAGER

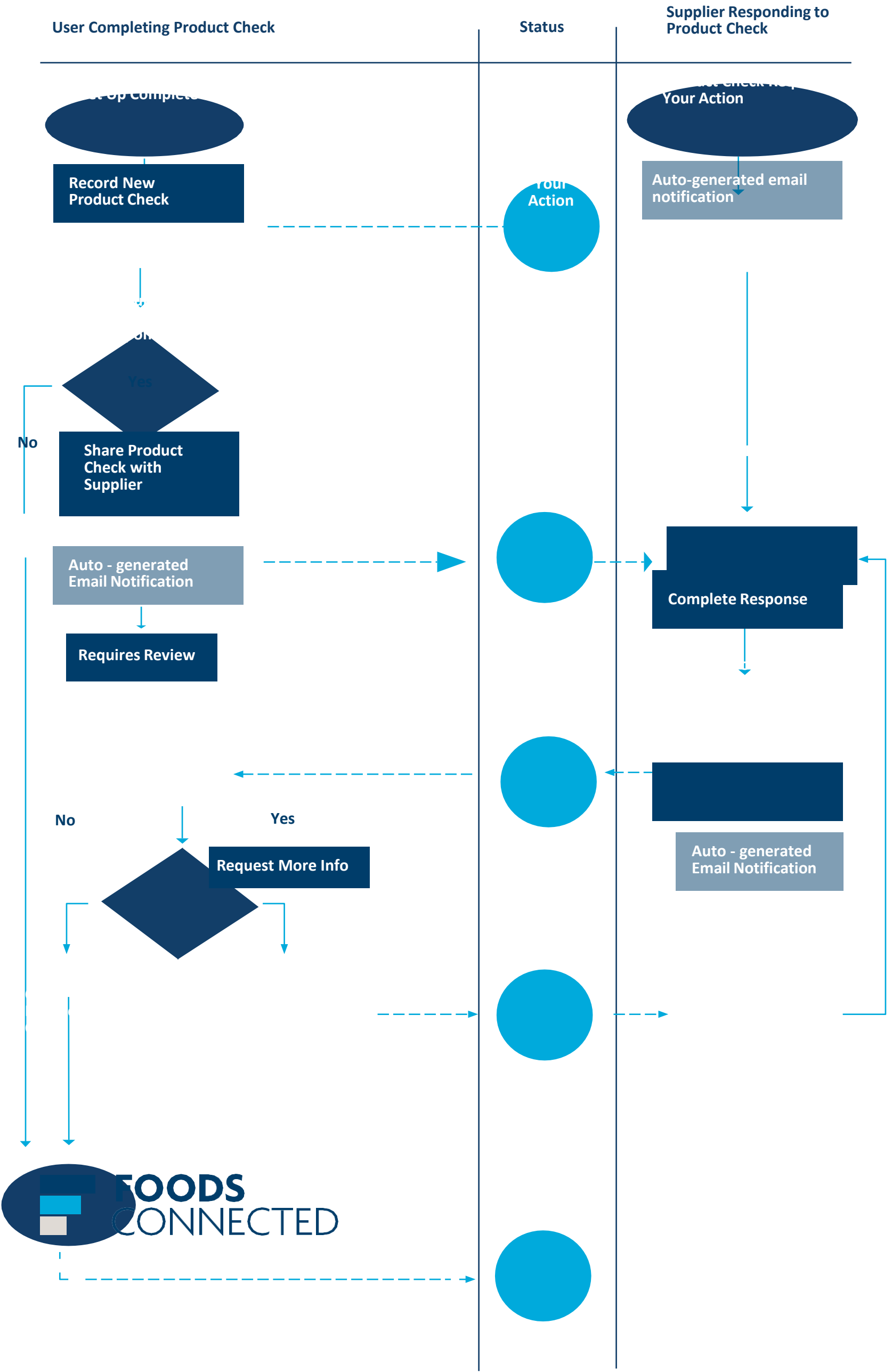
Product check statuses and completed forms can be viewed with all other supplier data in the supplier's profile within Supplier Manager.

#### FORMBUILDER

Our formbuilder is used to create fully customisable Product Check Templates.

TOOL PROCESS USAGE FLOW

The below process flow guides you through the steps of using the Product Check Manager.



## TOOL PROCESS USAGE STEPS - RECORDING PRODUCT CHECKS

The tool process usage flow steps are outlined below with explanations on what would be involved for the user within each stage when recording product checks.

### PROCESS STEP

### DETAILS

1. SET UP COMPLETE

The admin settings have been set up and the product check and response templates have been created according to requirements.

2. RECORD NEW PRODUCT CHECK

A user records a product check using the template, if relevant selecting a supplier and/or product. The product check's status updates to 'Requires Your Action'.

3. REQUIRES SUPPLIER RESPONSE?

The user decides whether the product check requires a response from the supplier or not.

4. YES - SHARE PRODUCT CHECK WITH SUPPLIER

If the product check requires a response, the check will either be automatically shared if auto-shares are enabled or it is shared manually with the relevant user. The product check status updates to 'Awaiting Response'.

5. LOG INTO FOODS CONNECTED

The relevant supplier contact will have received an email notification to respond to the product check, so they will log into their Foods Connected account.

6. COMPLETE RESPONSE

The supplier fills in the response template for the product check.

7. SEND RESPONSE

When the supplier has finished completing their response, they will send the response back to the customer.

8. **REQUIRES REVIEW**

The customer user will receive an email notification about the supplier's completed response and will review the response on the platform. The product check's status will become 'Requires Your Action'.

9. **REQUIRES FURTHER INFO?**

The customer user decides whether the given response is acceptable, or whether they require more information.

10. **YES - REQUEST MORE INFO**

If the customer user requires more information from the supplier, they send the request through the platform. The product check's status updates to 'Awaiting Response' and an email notification will be sent to the supplier user. Steps 5-9 are repeated until the supplier's response is accepted.

11. **CLOSE PRODUCT CHECK**

When the product check doesn't require a response, the product check is closed and its status updates to 'Closed'. When the customer user has accepted the supplier's response to the product check, the check is closed and its status updates to 'Closed'.

## CONFIGURATION OPTIONS

There are various possibilities for configuration within the Product Check Manager which are expanded upon below. They will allow you to tailor the tool to best fit your company's requirements for gathering supplier information, in a way that will make the process as hassle-free as possible.

OPTION	DETAILS
CUSTOM PRODUCTCHECKS	Build custom product checks to meet your requirements with our form builder's numerous field types including text, numeric, checkbox, dropdown and table options. Set fields as optional, mandatory or conditional mandatory based on an answer to a previous question.
PRE-SET FIELDS	Create pre-set fields to use within your product check templates, with standardised options which prevent you from building the same field options multiple times and they allow for more uniform reporting.
PRODUCT CHECKSITE	Every product check is set against the company group or an individual site to enable filtering and reporting against that site and to limit access to product checks by site.
SUPPLIER/PRODUCTTYPE	Product checks can be set against supplier type(s) and/or product type(s) so only relevant suppliers/products can be selected to record a product check for.
SCORING CRITERIA	Set scoring criteria against the customer issue form. Setting scores against each field and colour coding the total scores allows you to quickly view which issues score most highly.



## ADMINISTRATION OPTIONS

The administration settings for the Product Check Manager enable you to control aspects of how product checks are set up.

### OPTION

### DETAILS

#### ADDING PRE-SET FIELDS

The ability to create pre-set fields, with set options, which can be pulled into your product check forms, saves you time creating the same field and options multiple times. These fields can be dropdowns, checkboxes or tables with set options and they also help standardise response options, enabling easier and more consistent reporting.

## DATA REQUIREMENTS

Detailed below are the data requirements of what will be necessary to set up and make decisions on before launching the Product Check Manager.

### REQUIREMENTS

### DETAILS

#### SUPPLIER MANAGER LAUNCHED

To be able to complete a product check against suppliers, the Supplier Manager tool on Foods Connected needs to have been launched with all the required suppliers added into the supplier list.

#### PRODUCT FILE LAUNCHED

To be able to select a product for your product check, all the necessary products need to have been imported into your Foods Connected product file and set against the applicable product category.

#### CONFIRMED PRODUCT CHECK AND RESPONSE TEMPLATES

Before sending a product check, the format of the check and the response template should be decided upon, confirming all the fields which will be required to record the relevant information.

## PRE-SET FIELDS

If you plan to have pre-set fields within your product check, the standard list of options for these needs to be determined.

## SCORING CRITERIA

If scoring is to be used, the scores for each response and score boundaries must be confirmed. The boundary description and colour coding must also be confirmed.

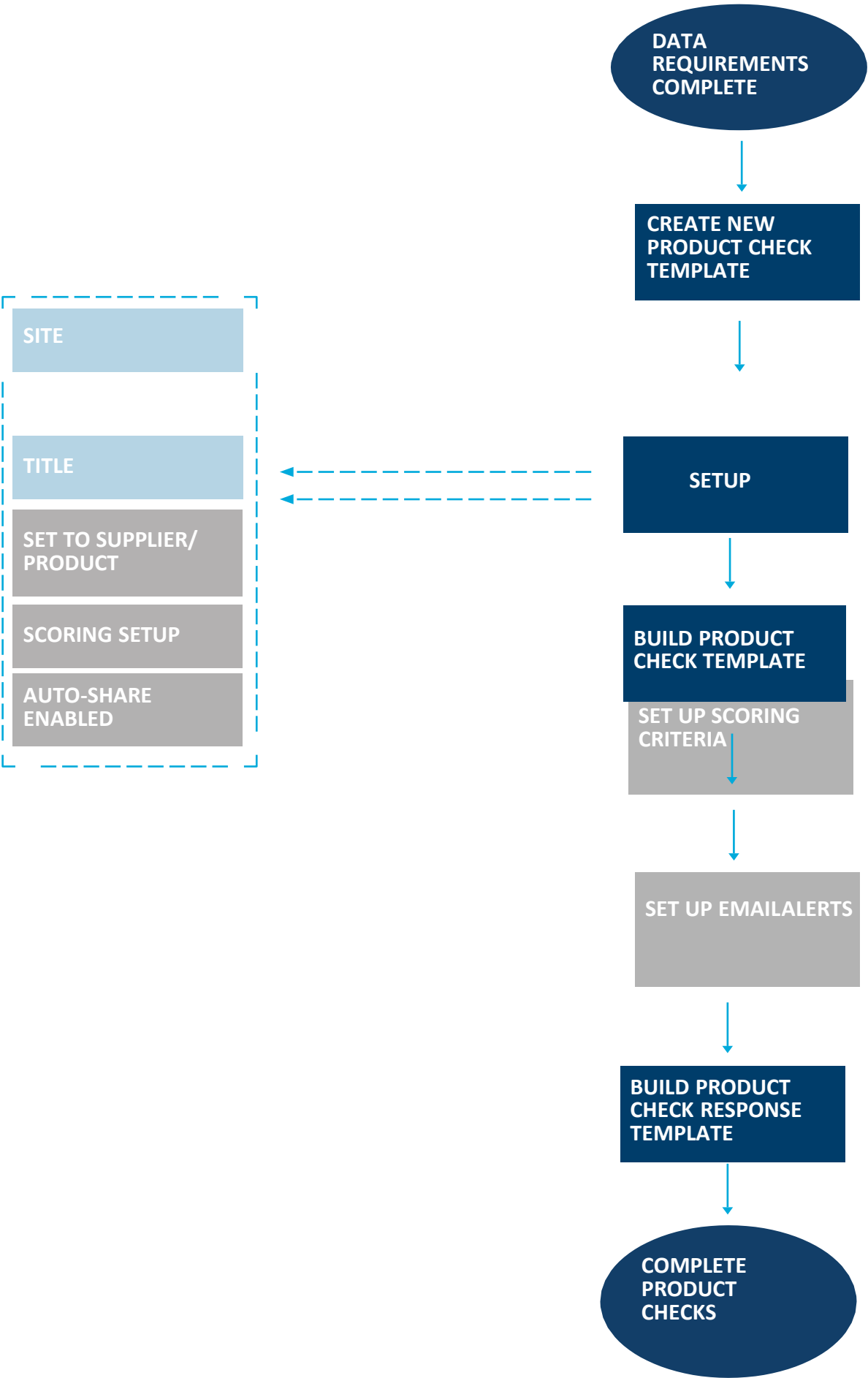
## AUTO SHARE CONTACTS

If auto-sharing is going to be utilised to automatically share product checks which require response to the relevant supplier, the supplier contacts need to be chosen.

TOOL SETUP PROCESS FLOW

The below process flow guides you through the steps of setting up the Product Check Manager and the information that needs to be included to be able to launch it to your suppliers.

PRODUCT CHECK ADMINISTRATOR



## TOOL PROCESS SETUP STEPS

The steps involved in setting up the Product Check Manager are expanded upon below detailing what needs to be done within each stage before being able to record product checks through the platform.

### PROCESS STEP

### DETAILS

- |     |  |   |
|-----|--|---|
| 1   | <b>DATA REQUIREMENTS COMPLETE</b>        | The Supplier Manager and Product File have been launched and the product check settings have been decided upon.                       |
| 2.  | <b>CREATE NEW PRODUCT CHECK TEMPLATE</b> | Create a new product check template.  |
| 3.  | <b>SETUP</b>                             | Select your product check template settings.  |
| 3a. | <b>SITE</b>                              | Choose which site the product check will be used for.   |
| 3b. | <b>TITLE</b>                             | Fill in the product check name.   |
| 3c. | <b>SET TO SUPPLIER/PRODUCT</b>           | If relevant, select which supplier type and/or product category the product check applies to.   |
| 3d. | <b>SCORING SETUP</b>                     | If applicable, choose which way you want the scoring to work for the template.  |
| 3e. | <b>AUTO SHARE ENABLED</b>                | If auto-sharing is to be used, choose which suppliers you want the check to be automatically shared with when a response is required. |
| 4.  | <b>BUILD PRODUCT CHECK TEMPLATE</b>      | Using the form builder, create the product check template with all the required fields and any pre-set fields.                        |

5.

#### SET UP SCORING CRITERIA

If scoring is turned on, set scoring up for the form and individual fields to calculate the overall score for the supplier.

6.

#### SET UP EMAIL ALERTS

Set up email alerts to send notifications to particular users based on options selected within the product check.

7.

#### BUILD PRODUCT CHECK RESPONSE TEMPLATE

Using the form builder, create the product check response template with all the required fields.

8.

#### COMPLETE SUPPLIER PRODUCT CHECKS

The template is now ready to record product checks with.