

# TOOL OVERVIEW



## SUPPLIER CHECK MANAGER



## TOOL OVERVIEW – SUPPLIER CHECK MANAGER

### TOOL SUMMARY

Our Supplier Check Manager tool enables you to carry out comprehensive supplier 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 supplier checks as well as improving your reporting ability.

As supplier 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 checks, responses and corrective actions. Fully tracked update history allows for better accountability and transparency of changes made by both the customer and supplier users.

Our reporting functionality allows you to analyse and create snapshots of the data recorded in your supplier 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 Supplier 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 detailed supplier 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 supplier check.

#### CORRECTIVE ACTION

Select specific field options to create an open issue within the supplier check which can then be sent to the supplier for corrective action.

#### SCORING CRITERIA

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

## CHECK SUMMARY

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

## COLOUR CODED STATUSES

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

## UPDATES HISTORY

All changes made to the supplier check templates, forms, responses or actions 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

Reporting can be carried out on the supplier checks. Utilise our analysis or snapshot reports to explore supplier check data with summary charts; both types can be exported to PDF or Excel.

## DASHBOARDS

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

## KEY BENEFITS

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

### BENEFIT

### DETAILS

#### CUSTOMISABLE

Our form builder for creating supplier checks has multiple different customisable field types such as dropdown options, checkboxes and tables allowing you to build forms which match your company requirements. Also, pre-set fields with custom options can be pulled into your form without the need to create the same field options multiple times.

## AUTOMATIC SCORING

Set up scoring within your supplier check template based on your company's scoring criteria. When supplier 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 supplier 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 supplier check. This ensures users are kept up-to-date with the information which is of key importance to them.

## AUTOMATIC CORRECTIVE ACTION TRIGGERS

Based on the field options set by the user, issues which require corrective action are automatically created according to your company's requirements. This removes extra work for the user and the number of issues is clearly marked beside each check, making it easier for all users reviewing the completed checks.

## REPORTING

Using our straight-forward reporting functionality you can create snapshots or analysis reports to explore supplier 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 co-operatively together all on the same system. The tools that can integrate and work together with the Supplier Check Manager are described below.

### TOOL

### DETAILS

#### SUPPLIER MANAGER

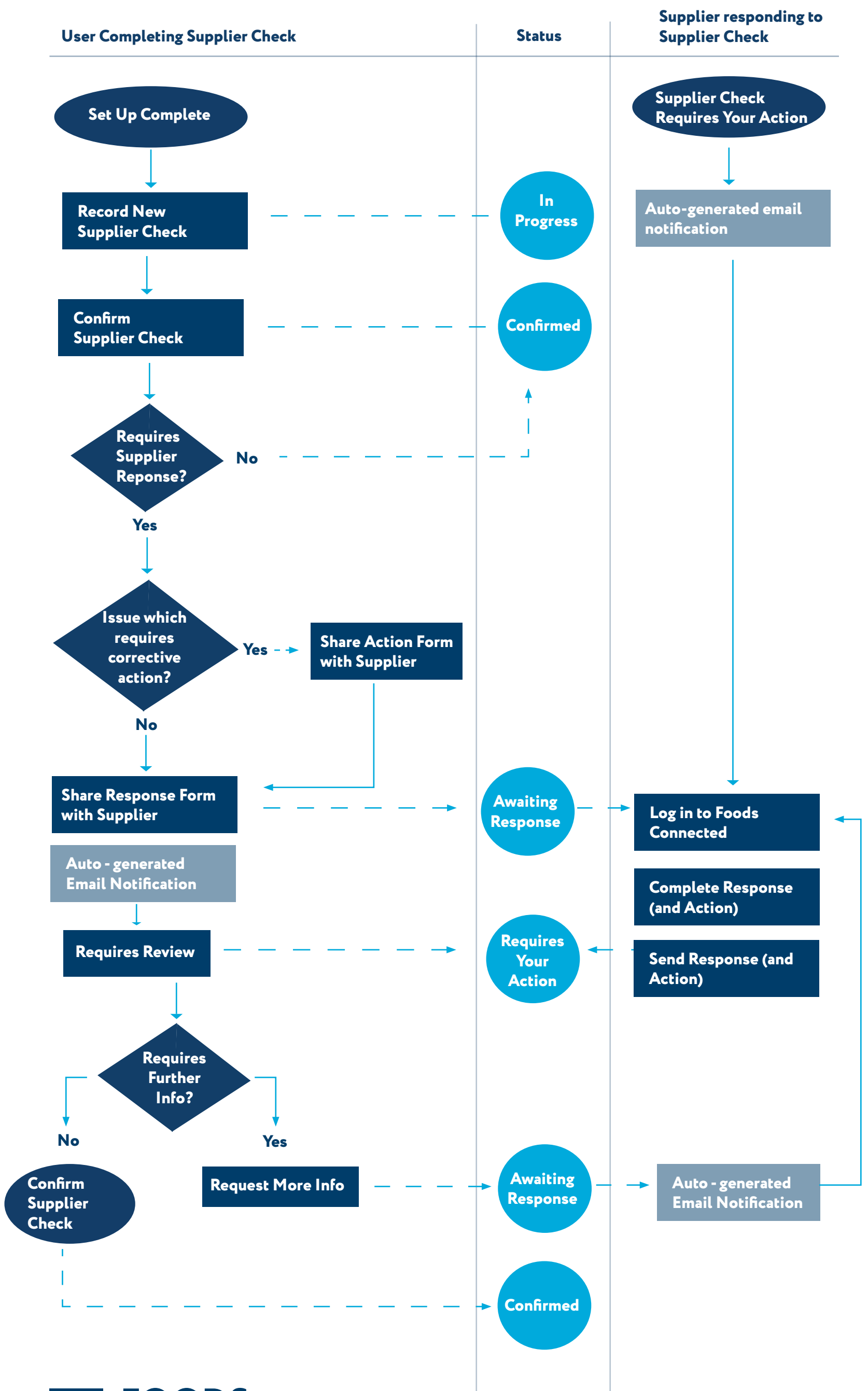
Supplier check statuses and completed forms can be viewed with all other supplier data in the supplier's profile within the Supplier Manager.

#### FORMBUILDER

Our formbuilder is used to create fully customisable supplier check templates.

## TOOL PROCESS USAGE FLOW

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



## TOOL PROCESS USAGE STEPS - RECORDING SUPPLIER 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 supplier checks.

### PROCESS STEP

### DETAILS

1.

#### SET UP COMPLETE

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

2.

#### RECORD NEW SUPPLIER CHECK

Every document is set against the company group or an individual site to enable filtering and reporting against that site and to limit access to documents by site.

3.

#### CONFIRM SUPPLIER CHECK

The user confirms the supplier check before sending to the supplier for response.

4.

#### REQUIRES SUPPLIER RESPONSE?

The user decides whether the supplier check requires a response from the supplier or not. If it doesn't require a response, the check remains with a status of 'Confirmed'.

5.

#### YES - ISSUE WHICH REQUIRES CORRECTIVE ACTION

If the supplier check requires a response, the next step is whether the supplier check includes an issue which needs corrective action. If it does not have an issue, the user just sends the response template to the supplier. If it does have an issue, the user sends the response and action templates to complete. The supplier check status updates to 'Awaiting Response'.

6.

#### LOG INTO FOODS CONNECTED

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

7.

**COMPLETE  
RESPONSE**

The supplier fills in the response template for the supplier check, and, if relevant, the action template.

8.

**SEND RESPONSE**

Footer options for PDF exports of documentation can include page numbering, export details and customisable text as appropriate to your company's needs.

9.

**REQUIRES REVIEW**

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

10.

**REQUIRES FURTHER  
INFO?**

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

11.

**YES - REQUEST MORE  
INFO**

If the customer user requires more information from the supplier, they send the request through the platform. The supplier check's status updates to 'Awaiting Response' and an email notification will be sent to the supplier user. Steps 6-10 are repeated until the supplier's response is accepted.

12.

**CONFIRM SUPPLIER  
CHECK**

When the customer user has accepted the supplier's response to the supplier check, the check is confirmed and its status updates to 'Confirmed'.

## CONFIGURATION OPTIONS

There are several possibilities for configuration within the Supplier 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 SUPPLIER CHECKS

Build custom supplier 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 supplier check templates, with standardised options which prevent you from building the same field options multiple times and allow for more uniform reporting.

#### SUPPLIER CHECK SITE

Every supplier check is set against the company group and/or individual site(s) to enable filtering and reporting against those sites and to limit access to supplier checks by site.

#### SUPPLIER TYPE

Supplier checks can be set against supplier type(s) so only relevant suppliers can be selected to record a supplier check.

#### SCORING CRITERIA

Set scoring criteria against the supplier check form. Setting scores against each field and colour coding the total scores allows you to quickly view which suppliers score most highly.

#### REVIEW FREQUENCY

Set a review frequency for your supplier check, e.g. once per year, which means the supplier check must be reviewed once a year and reminders appear to ensure the data is kept up-to-date.



## ADMINISTRATION OPTIONS

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

### OPTION

### DETAILS

#### ADDING PRE-SET FIELDS

The ability to create pre-set fields, with set options, which can be pulled into your supplier 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 Supplier Check Manager.

### REQUIREMENTS

### DETAILS

#### SUPPLIER MANAGER LAUNCHED

To be able to complete a supplier 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.

#### CONFIRMED SUPPLIER CHECK, RESPONSE AND ACTION TEMPLATES

Before sending a supplier check, the format of the check, response and action templates 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 supplier 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.

**ALERTS**

If alerts are going to be set to automatically send notifications when a supplier check has been completed, a list of the relevant company users needs to be gathered to ensure they are set up on the platform.

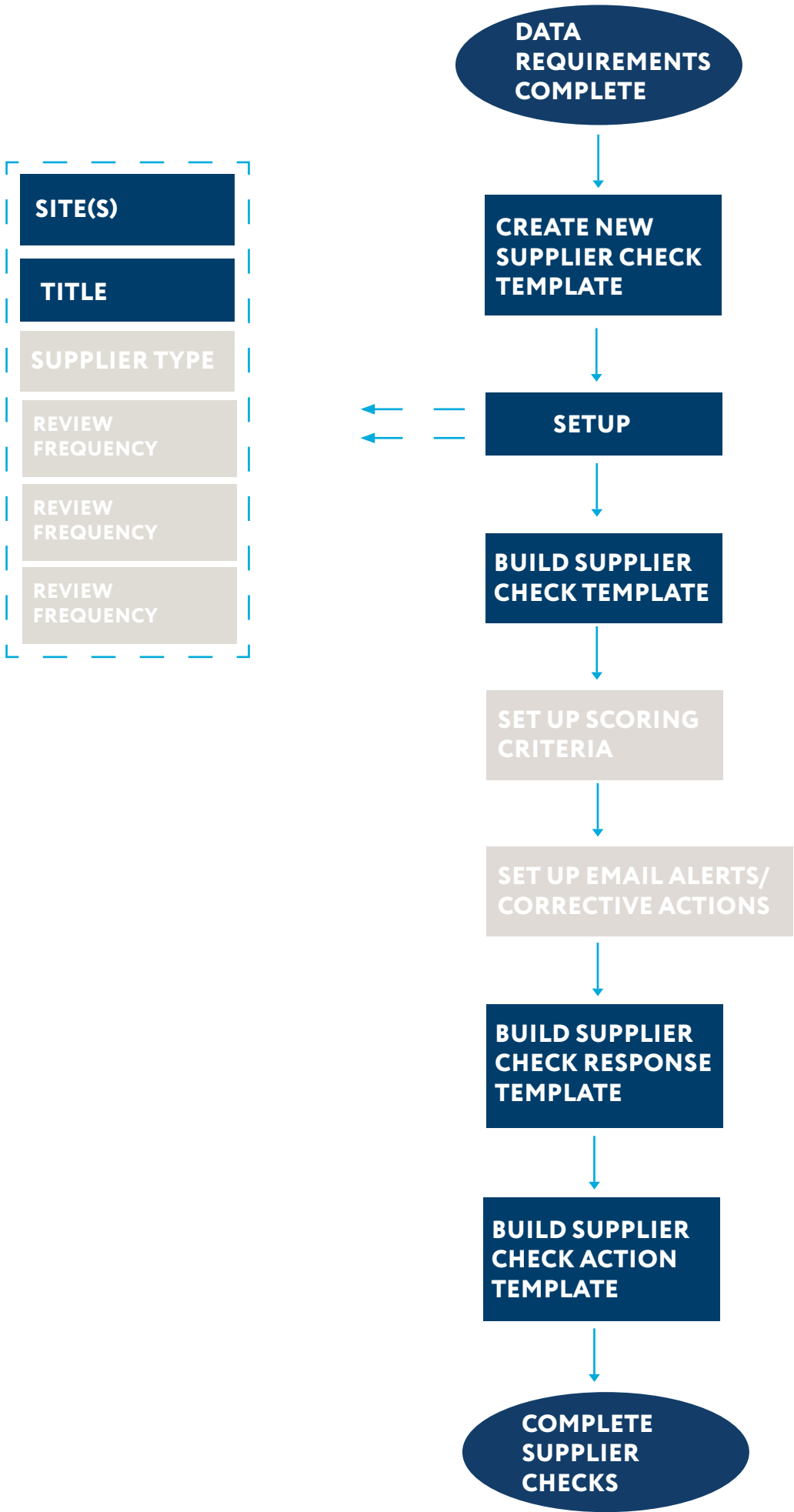
**REVIEW FREQUENCY**

If a review frequency is going to be used, the time period for reviewal needs to be decided upon.

TOOL SETUP PROCESS FLOW

The below process flow guides you through the steps of setting up the Supplier Check Manager and the information that needs to be included to be able to start recording checks and sending them to your suppliers.

SUPPLIER CHECK ADMINISTRATOR



## TOOL PROCESS SETUP STEPS

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

### PROCESS STEP

### DETAILS

1.

#### DATA REQUIREMENTS COMPLETE

The Supplier Manager has been launched and the supplier check templates and settings have been decided upon.

2.

#### CREATE NEW SUPPLIER CHECK TEMPLATE

Create a new supplier check template.

3.

#### SETUP

Select your supplier check template settings.

3a.

#### SITE(S)

Choose which site(s) the supplier check will be used for.

3b.

#### TITLE

Fill in the supplier check name.

3c.

#### SUPPLIER TYPE

If relevant, select which supplier type the supplier check applies to.

3d.

#### REVIEW FREQUENCY

If you want to review the checks at a set period, select the review frequency at which the recorded checks must be reviewed.

3e.

#### SCORING SETUP

If applicable, choose which way you want the scoring to work for the template.

**3f. ALERTS**

If alerts are to be sent, select the users who will receive an email alert when a check has been completed.

**4. BUILD SUPPLIER CHECK TEMPLATE**

Using the form builder, create the supplier 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 / CORRECTIVE ACTIONS**

Set up email alerts to send notifications to particular users based on options selected within the supplier check and create corrective action triggers to create an open issue to which suppliers must provide corrective action.

**7. BUILD SUPPLIER CHECK RESPONSE TEMPLATE**

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

**8. BUILD SUPPLIER CHECK ACTION TEMPLATE**

Using the form builder, create the supplier check action template with all the required fields which the supplier will complete with their corrective action when an issue has been created.

**9. COMPLETE SUPPLIER CHECKS**

The template is now ready to record supplier checks with.