

# TOOL USER GUIDE



## SUPPLIER MANAGER AND SUPPLIER APPROVAL



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## 1. INITIAL SETUP – ADMIN TAB

Before you start using the Supplier Manager and all its features there is some Initial setup that needs to be completed prior to adding Suppliers and activating the Supplier Approval Processes.

Visible columns allow you to customise what you see for each Supplier on your overview in your Supplier list view.

### 1.1 GENERAL ADMIN

#### 1.1.1 VISIBLE COLUMNS – SETUP

**Step 1: Supplier Manger, select *Admin* → *General Admin* → *Visible Columns***

**Supplier Manager**

Supplier List | Supplier Attributes | Compliance | Contacts List | Supply Chain Map | Maps | Activity Overview | **Admin**

**Visible Columns** | Select which columns you would like displayed in the main List page in addition to the Supplier column below.

Optional Fields	Column Name	
Custom Fields	Factory Code(s)	
Active Status	Country	
Accessible Data	Company Ref	
Supplier Review Frequency	Goods Ref	
Custom Views	Last Audit Details	
General Settings	Audit Frequency	
	Supplied Via	
	Supplied Via - Details Row	
	Status	

**Admin**

- General Admin**
- Compliance Setup
- Supplier Share Groups

**Step 2: Multiple site setup** - On each **Column Name** you want to include on your Supplier List view, select the **blue button**.

**Supplier Manager**

Supplier List | Supplier Attributes | Compliance | Contacts List | Supply Chain Map | Maps | Activity Overview | **Admin**

**Visible Columns** | Select which columns you would like displayed in the main List page in addition to the Supplier column below.

Optional Fields	Column Name	
Custom Fields	Factory Code(s)	
Active Status	Country	
Accessible Data	Company Ref	
Supplier Review Frequency	Goods Ref	
Custom Views	Last Audit Details	
General Settings	Audit Frequency	
	Supplied Via	
	Supplied Via - Details Row	
	Status	

**Admin**

- General Admin**
- Compliance Setup
- Supplier Share Groups

**Step 3:** If you have your company has multiple sites on Foods Connected you can now select what you want to see for each site by ticking them off. If factory 1 doesn't have any suppliers categorised as Dairy & Oil you can deselect. Select **Save Settings** when done.

**Supplier Manager**

Supplier List | Supplier Attributes | Compliance | Contacts List | Supply Chain Map | Maps | Activity Overview | Admin

**Visible Columns**

Select which columns you would like displayed in the main List page in addition to the Supplier column below.

Optional Fields

Custom Fields

Active Status

Accessible Data

Supplier Review Frequency

Custom Views

General Settings

Column Name

Factory Code(s)

[Uncheck All](#)

	Group	Clothing	Factory 1	Factory 2	Factory 3	Factory 4	Packaging	Pr
<input type="radio"/> Meat	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="radio"/> Ingredients	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="radio"/> Bakery	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="radio"/> Dairy	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="radio"/> Packaging	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="radio"/> Oil	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="radio"/> Vegetables	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="radio"/> Salt	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="radio"/> Seafood	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="radio"/> Fruit ' Grower'	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="radio"/> Farm	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="radio"/> Services	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="radio"/> Agent / Broker	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

OR

**Step 3:** If you have a single site on Foods Connected, your view will look like this below. Simply select what you want to see in your supplier list. Select **Save Settings** when done.

**Supplier Manager**

Supplier List | Supplier Attributes | Compliance | Contacts List | Maps | Activity Overview | Admin

**Visible Columns**

Select which columns you would like displayed in the main List page in addition to the Supplier column below.

Optional Fields

Custom Fields

Active Status

Accessible Data

Supplier Review Frequency

Custom Views

General Settings

Column Name

Factory Code(s)

Country

Company Ref

Goods Ref

Supplied Via

Supplied Via - Details Row

Status

Compliant Level

Lead Technical

Lead Commercial

Location

Approved Associated Sites

Linked Customer

Site Relationship

Company Supplier Type

Sub Supplier Type

Supplier Lead Technical

Risk Rating (Custom Field)

Any other info (Custom Field)

[Save Settings](#)

**Step 4:** Repeat these steps for every other column name that you want to setup in your Supplier List view. Your view will end up looking like this below. Which can always be amended.

**Supplier Manager**

Supplier List | Supplier Attributes | Compliance | Contacts List | Supply Chain Map | Maps | Activity Overview | Admin

Site: Democo (Group) | Supplier Type: All | Status: All | Country: All | Search: Search... | Filter | Clear Filters

Supplier Sub Type: All | Supplied Via: All | Lead Technical: All | Compliant Level: All

Business Activity: All | Business Sub Activity: All | Under Exception: All

+ Add New | Detail Reports | Export to Excel | Summary Report | Bulk Update | Map View | Via Chain View | Attributes

Viewing 109 results. Page 1 of 3

	Factory Code(s)	Company Name	Country	Supplier Type	Supplier Sub Type	Lead Technical	Under Exception	Supplied Via	Linked Customer	Status	Compliant	
<input type="checkbox"/>	US 323232	Abattoir 1	United States	Meat Processor	Beef, Lamb, Pork	Steve Jones				Approved	Compliant	View
<input type="checkbox"/>	1234	ABC Laboratories	New Zealand	Laboratory						Delisted	N/A	View
<input type="checkbox"/>	NZ 347761	ABC Snacks Ltd	United Kingdom	Snacks	Biscuits & Cakes	Steve Jones				Approved	Compliant	View
<input type="checkbox"/>		Acme Food Co	Eng & Wales (UK)	Poultry Farm	Free Range, Organic, Chicken	Steve Jones				In Progress	Requires Your Action	View
<input type="checkbox"/>	EC 343434	Acorn Produce	United Kingdom	Fruit 'Grower'	Apples, Pears	Steve Jones		Fruit e Frutta		Requires Review	Non-Compliant	View
<input type="checkbox"/>		Agent	Australia	Agent / Broker		Tom Redden				Requires Review	Non-Compliant	View
<input type="checkbox"/>		Agent - Farmer 2	Australia	Agent / Broker		Steve Jones				Requires Review	Non-Compliant	View
<input type="checkbox"/>		Agent - Naparoo	Australia	Agent / Broker		Steve Jones				Approved	Compliant	View
<input type="checkbox"/>	1234567	AusAbattoir	Australia	Abattoirs	Beef, Lamb	Steve Jones				Requires Review	Non-Compliant	View

### 1.1.2 OPTIONAL FIELDS - HOW TO CREATE & SETUP THE OPTIONAL FIELDS

Before you can add Suppliers you need to setup their Types, sub types & business activity if need be. This allows you to categorise your suppliers, E.g Red Meat, Ingredients, Poultry etc. (Type > Red Meat)

#### 1.1.2.1 How to setup Supplier Types.

**Step 1: Supplier Manger, select Admin → General Admin → Optional fields**

**Supplier Manager**

Supplier List | Supplier Attributes | Compliance | Contacts List | Supply Chain Map | Maps | Activity Overview | Admin

Visible Columns: To utilise these fields simply set them to active, change the name of the field and then set up the additional configuration menu button. Fields set to active will appear in Visible Columns tab.

Optional Fields

Custom Fields

Active Status

Accessible Data

Supplier Review Frequency

Custom Views

General Settings

Field: Company Supplier Type | Display Name: | Active: ☒ | Mandatory: ☒ | [Menu]

Field: Sub Supplier Type | Display Name: Supplier Sub Type | Active: ☒ | Mandatory: ☐ | [Menu]

Field: Business Activity | Display Name: | Active: ☒ | Mandatory: ☐ | [Menu]

Field: Business Sub Activity | Display Name: Business Sub Activity | Active: ☒ | Mandatory: ☐ | [Menu]

Save Settings

**Step 2:** Set the **Company Supplier Type** to **Active** by ticking the Active Box, then select **Save Settings**.

**Optional:** If you select **Mandatory** this means when you go to add a new supplier you need to select the suppliers type when adding or you won't be able to add the supplier to your supplier list. (It becomes a mandatory field)

**Supplier Manager**

Supplier List Supplier Attributes Compliance Contacts List Supply Chain Map Maps Activity Overview Admin

Visible Columns To utilise these fields simply set them to active, change the name of the field and then set up the additional configuration menu button. Fields set to active will appear in Visible Columns tab.

**Optional Fields**

Field	Display Name	Active	Mandatory	
Company Supplier Type		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Sub Supplier Type	Supplier Sub Type	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Business Activity		<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Business Sub Activity	Business Sub Activity	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

**Save Settings**

### Step 3: Select Menu Key to add required Types

**Supplier Manager**

Supplier List Supplier Attributes Compliance Contacts List Supply Chain Map Maps Activity Overview Admin

Visible Columns To utilise these fields simply set them to active, change the name of the field and then set up the additional configuration menu button. Fields set to active will appear in Visible Columns tab.

**Optional Fields**

Field	Display Name	Active	Mandatory	
Company Supplier Type		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Sub Supplier Type	Supplier Sub Type	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Business Activity		<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Business Sub Activity	Business Sub Activity	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

**Save Settings**

### Step 4: Select **Add New Option** & add the Supplier Types you require. E.g. Red Meat, Ingredients, Poultry.

#### Company Supplier Type - Category Manager

Below are the current category options available for you to use. Please note deleting or editing an option will affect any companies that are currently linked to that option.

**Add New Option** Re-Order Options Save Changes

Option Name	Children	Map Icon	Forms
Ingredients	-----		
Bakery	-----		
Seafood	Crustacean Fish		
Meat	Chicken Pork		




**Step 5:** Add the type and then select a map icon for that type if you want too. Select **Save Changes**

Supplier Manager - Company Supplier Type ← Back to List

Supplier List Supplier Attributes Compliance Contacts List Supply Chain Map Maps Activity Overview Admin

Add Option

Option Name

Map Icon 

Cancel **Save Changes**

**Step 6:** When done your Supplier Types will look like this below. You can re-order, Edit & delete from here.













Supplier Manager ← Back

Supplier List Supplier Attributes Compliance Contacts List Supply Chain Map Maps Activity Overview Admin

Company Supplier Type - Category Manager

Below are the current category options available for you to use. Please note deleting or editing an option will affect any companies that are currently linked to that option.

**Add New Option** **Re-Order Options** **Save Changes**

Option Name	Children	Map Icon	Forms
Brand Owner	-----	  	
Laboratory	-----	  	
Beverages	Soft Drinks Tea	  	

### 1.1.2.2 Data Forms

Here you can see a Function called **Forms**. This is a function that allows you to create a customised form to collect extra data on your suppliers for each type using Form Builder. Data like quantity you buy from a supplier or anything else. Internal is data you input on your supplier. External is data you can request your Supplier to complete and send back. These forms are not mandatory. **(Please ignore Supplier Request)**

### Internal Forms

**Step 1:** Select **Forms** beside your Supplier Type, then select **Internal**.

**Step 2:** Simply use Form builder here to create your data capture form. Save when done.

## External Forms

**Step 1:** Select **Forms** beside your Supplier Type, then select **External**.

**Step 2:** Simply use Form builder here to create your data capture form. Save when done.

Your forms are now complete & can be used at a later stage, when you add suppliers. We will touch on this later in the guide and I will reference back to this step.

### 1.1.2.3 How to create & setup Supplier Sub Types

Supplier Sub types can be turned on or off depending if you want or need to categorise your suppliers further by selecting **Active**. Categorising further helps to filter suppliers and target suppliers so it is recommended.

**Optional:** If you select **Mandatory** this means when you go to add a new supplier you need to select the supplier's Sub Type when adding or you won't be able to add the supplier to your supplier list. (It becomes a mandatory field)

Next follow the Steps below to add **Sub Types** this will then enable you to link the Categories & Sub Types like a Parent/Child relationship. e.g.

**Category** → Poultry

**Sub Type** → Chicken, Duck, Turkey

### Step 1: Select Sub Supplier Type

**Supplier Manager**

Supplier List | Supplier Attributes | Compliance | Contacts List | Supply Chain Map | Maps | Activity Overview | **Admin**

Visible Columns: To utilise these fields simply set them to active, change the name of the field and then set up the additional configuration menu button. Fields set to active will appear in Visible Columns tab.

**Optional Fields**

Field	Display Name	Active	Mandatory
Company Supplier Type		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sub Supplier Type	Supplier Sub Type	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Business Activity		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Business Sub Activity	Business Sub Activity	<input checked="" type="checkbox"/>	<input type="checkbox"/>

[Save Settings](#)

### Step 2: Select Add New Option

**Supplier Manager** [← Back](#)

**Supplier Sub Type - Category Manager**

Below are the current category options available for you to use. Please note deleting or editing an option will affect any companies that are currently linked to that option.

[+ Add New Option](#) [↕ Re-Order Options](#) [Save Changes](#)

Option Name	Parents
Chicken	Meat
Pork	Meat
Vegetables	Fresh produce
Fruit	Fresh produce
Fish	Seafood
Crustacean	Seafood

**Step 3:** Now add in your sub type & select which Type or Types this sub type sits under. When done select **Save**

Supplier Manager - Supplier Sub Type

Supplier List | Supplier Attributes | Compliance | Contacts List | Supply Chain Map | Maps | Activity Overview | Admin

**Add Option**

Option Name:

Parents: 1 Selected

Search...

- ☒ Ingredients
- ☐ Bakery
- ☐ Dairy
- ☐ Packaging
- ☐ Feed Ingredients
- ☐ Snacks
- ☐ Sakeyard
- ☐ Service Kill
- ☐ Agent
- ☐ Direct Vendor

Cancel | **Save Changes**

**Step 6:** Your categories will end up looking like this. At any stage if you need to edit, select the Edit button & follow the steps above. You can re-order the Sub types here, and you can delete from here as well. Once done select **Save Changes**

Supplier Manager

Supplier Sub Type - Category Manager

Below are the current category options available for you to use. Please note deleting or editing an option will affect any companies that are currently linked to that option.

[Add New Option](#) | **Re-Order Options** | [Save Changes](#)

Option Name	Parents	
Chicken	Meat	
Pork	Meat	
Vegetables	Fresh produce	
Fruit	Fresh produce	
Fish	Seafood	
Crustacean	Seafood	

#### 1.1.2.4 Business Activity & Sub Activity

These functions allow you to further categorise your suppliers. i.e

**Type** – Ingredients > **Sub Type** > Dairy > **Business Activity** > Powder > **Business Sub Activity** Infant

Business Activity & Sub Activity can be turned on or off depending on if you want or need to categorise your suppliers further by selecting **Active**.

**Optional:** If you select **Mandatory** this means when you go to add a new supplier you need to select the supplier's **Business Activity & Sub Activity** when adding or you won't be able to add the supplier to your supplier list. (It becomes a mandatory field)

Next follow the Steps below to add **Business Activity & Sub Activity** this will then enable you to link the Activity & Sub Activities like a Parent/Child relationship

## Step 1: Select the Business Activity

**Supplier Manager**

Supplier List | Supplier Attributes | Compliance | Contacts List | Supply Chain Map | Maps | Activity Overview | **Admin**

Visible Columns: To utilise these fields simply set them to active, change the name of the field and then set up the additional configuration menu button. Fields set to active will appear in Visible Columns tab.

**Optional Fields**

Field	Display Name	Active	Mandatory	
Company Supplier Type		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Sub Supplier Type	Supplier Sub Type	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Business Activity		<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Business Sub Activity	Business Sub Activity	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

**General Admin**  
Compliance Setup  
Supplier Share Groups

**Save Settings**

## Step 2: Now select Add New Option

**Supplier Manager** ← Back

Supplier List | Supplier Attributes | Compliance | Contacts List | Supply Chain Map | Maps | Activity Overview | **Admin**

**Business Activity - Category Manager**

Below are the current category options available for you to use. Please note deleting or editing an option will affect any companies that are currently linked to that option.

**Add New Option** Re-Order Options Save Changes

Option Name	Children	
Food	-----	
Fabric Mill	-----	
Manufacturer Clothing	Boys Girls Shirts	
Processor	-----	
Manufacturer	-----	

## Step 3: Add business activity name, select Save Changes when done.

**Supplier Manager - Business Activity** ← Back to List

Supplier List | Supplier Attributes | Compliance | Contacts List | Supply Chain Map | Maps | Activity Overview | **Admin**

**Add Option**

Option Name:

Cancel **Save Changes**

**Step 4:** Your **Business activity** options will look like this below. At any stage if you need to edit, select the Edit button & follow the steps above. You can re-order the activities here, and you can delete from here as well. Once done select **Save Changes**.

**Repeat these same steps for the Business Sub Activity.**

**Supplier Manager** ← Back

Supplier List Supplier Attributes Compliance Contacts List Supply Chain Map Maps Activity Overview Admin

**Business Activity - Category Manager**

Below are the current category options available for you to use. Please note deleting or editing an option will affect any companies that are currently linked to that option.

[Add New Option](#) [Re-Order Options](#) [Save Changes](#)

Option Name	Children	
Food	-----	
Fabric Mill	-----	
Manufacturer Clothing	Boys Girls Shirts	
Processor	-----	
Manufacturer	-----	
Distributor	-----	
Retailer	-----	
Grower	-----	
Packhouse Tier 2	-----	

### 1.1.3 CUSTOM FIELDS - HOW TO CREATE & SETUP CUSTOM FIELDS ON THE SUPPLIER MANAGER

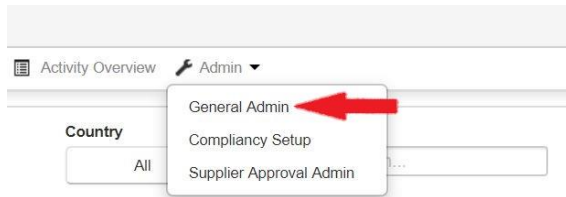
Custom fields allow you to create a custom field that lets you capture certain details that are specific to your business for those suppliers. This should be set up before you begin adding suppliers to allow you to select these when adding a supplier.

**Below is how a custom field will look in your Supplier List**

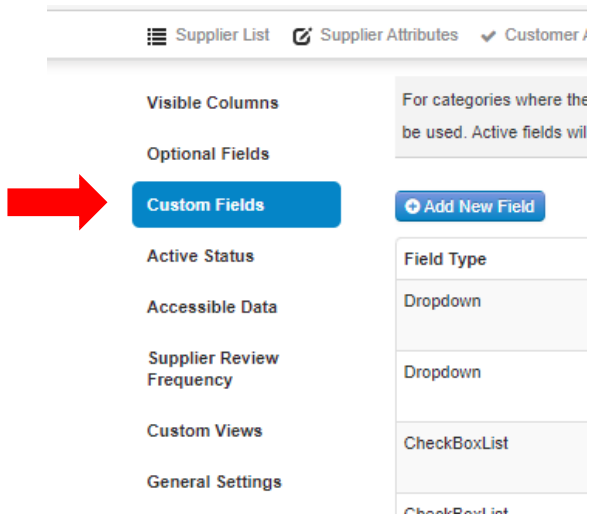
[Add New](#) [Detail Reports](#) [Export to Excel](#) [Summary Report](#) [Bulk Update](#) [Map View](#) [Via Chain View](#) [Attributes](#) Viewing 9 results. Page 1 of 1


	Factory Code(s)	Company Name	Country	Supplier Type	Supplier Sub Type	Lead Technical	Under Exception	Supplied Via	Linked Customer	Status	Compliant	
<input type="checkbox"/>	US 323232	Abattoir 1	United States	Meat Processor	Beef, Lamb, Pork	Steve Jones				Approved	Compliant	<a href="#">View</a>
<input type="checkbox"/>	NZ 347761	ABC Snacks Ltd	United Kingdom	Snacks	Biscuits & Cakes	Steve Jones				Approved	Compliant	<a href="#">View</a>
<input type="checkbox"/>	MX 373737	Corn Farm Co-Op	Mexico	Farm	Organic	Steve Jones				Requires Review	Requires Your Action	<a href="#">View</a>
<input type="checkbox"/>	EC 212121	Dairy Co	Ireland	Dairy	Milk, Powder	Steve Jones				Requires Review	Requires Your Action	<a href="#">View</a>
<input type="checkbox"/>	IT 234112	Fruit e Frutta	Italy	Fruit 'Grower'	Apples, Pears, Citrus, Grapes	Steve Jones		Acorn Produce Via Finished Foods		Approved	Compliant	<a href="#">View</a>

**Step 1:** Go to the *Admin* section of your Supplier Manager & select **General Admin**






**Step 2:** Select **Custom Fields**



**Step 3:** On the custom fields page to the right of **Category 1 Field – Dropdown**. Name the field that will appear in the main Supplier List table. Then set the field as **Active** to enable them to appear in the supplier list. Once you complete those steps, click on the Menu icon  to add the required options

For categories where there is a low or fixed number of potential options you can use our custom fields. Simply set it to active, change the name of the field and then set up the drop-down options that can be used. Active fields will appear in Visible Columns tab.

Field Type	Display Name	Active	
Dropdown	Primary/Secondary	<input checked="" type="checkbox"/>	
Dropdown	High Risk	<input checked="" type="checkbox"/>	
CheckBoxList	Customer	<input type="checkbox"/>	

## Step 4: Select Add New Option

### Primary/Secondary - Category Manager

Below are the current category options available for you to use. Please note deleting or editing an option will affect any companies that are currently linked to that option.

**Add New Option**

Re-Order Options

Save Changes

Option Name	Children	
Primary	-----	 
Secondary	-----	 
Tier 3	-----	 
Abattoir	-----	 

## Step 5: Enter in your options required for your custom field. Select Save Changes when done

### Supplier Manager - Primary/Secondary

Back to List

Supplier List Supplier Attributes Compliance Contacts List Supply Chain Map Maps Activity Overview Admin

### Add Option

Option Name

New Option

Cancel

Save Changes

**Step 6:** Your **Custom Field** options will look like this below. At any stage if you need to edit, select the Edit button & follow the steps above. You can re-order the activities here, and you can delete from here as well. Once done select **Save Changes**.

### Primary/Secondary - Category Manager

Below are the current category options available for you to use. Please note deleting or editing an option will affect any companies that are currently linked to that option.

**Add New Option**

Re-Order Options

Save Changes

Option Name	Children	
Primary	-----	 
Secondary	-----	 
Tier 3	-----	 
Abattoir	-----	 

**Step 7:** If you want or need to make these columns visible on your main supplier list view, go to **Visible Columns**. The new Custom Category you created is now visible and you can select what you want to show for your sites or site (If you are only 1 site) as you did in Visible Columns 1.1. As you can see the new custom field will be denoted **Custom Field**

**Supplier Manager**

Supplier List Supplier Attributes Customer Approved List Compliance Contacts List Maps Activity Overview Admin

**Visible Columns** Select which columns you would like displayed in the main List page in addition to the Supplier column below.

Optional Fields	Column Name	
Custom Fields	Factory Code(s)	
Active Status	Country	
Accessible Data	Company Ref	
Supplier Review Frequency	Goods Ref	
Custom Views	Last Audit Details	
General Settings	Supplied Via	
	Supplied Via - Details Row	
	Status	
	Compliant Level	
	Lead Technical	
	Lead Commercial	
	Location	
	Approved Associated Sites	
	Linked Customer	
	Site Relationship	
	Company Supplier Type	
	Sub Supplier Type	
	Business Activity	
	Business Sub Activity	
	Supplier Lead Technical	
	Path Point 1	
	Product Types Supplied (Custom Field)	
	Product Sub Types (Custom Field)	
	CPH (Custom Field)	
	Season (Custom Field)	
	Test (Custom Field)	

**Step 8:** When you click on the expandable dropdown on the right another table opens highlight what columns you want visible on your Supplier List. You can highlight all or certain sites, customisable to what you need. Once done click **Save Settings**.

**Supplier Manager**

Supplier List Supplier Attributes Customer Approved List Compliance Contacts List Maps Activity Overview Admin

**Visible Columns** Select which columns you would like displayed in the main List page in addition to the Supplier column below.

Optional Fields	Column Name	
Custom Fields	Factory Code(s)	
Active Status	<b>Uncheck All</b>	
Accessible Data		
Supplier Review Frequency	Deleted - Bakery	
Custom Views	Deleted - Ingredients	
General Settings	Deleted - Test	
	Fresh produce	
	Meat	
	Packaging	
	Seafood	

**Step 8:** You have now completed setting up a custom field in the supplier manager for each. At any stage if you need to edit follow the steps above.



### 1.1.4 ACTIVE STATUS - SET ACTIVE STATUSES TO USE FOR YOUR SUPPLIER STATUS

Active statuses are the status you want to use for the stages of your supplier's as they Progress along the Supplier Approval Process

**Step 1:** Go to **Supplier Manger**, then select **Admin** → **General Admin** → **Active Statuses** on the left

Select the supplier statuses used by the company	
Status	
Approved	<input checked="" type="checkbox"/>
In Progress	<input checked="" type="checkbox"/>
Approval In Progress	<input type="checkbox"/>
Suspended	<input type="checkbox"/>
Requires Review	<input checked="" type="checkbox"/>
Delisted	<input checked="" type="checkbox"/>
Temporarily Approved	<input type="checkbox"/>
Partially Approved	<input type="checkbox"/>
Not Supplying	<input type="checkbox"/>

[Save Settings](#)

**Step 2:** Select which statuses you want to use by ticking them. Your statuses are now active and ready to use on the system. At any stage if you need to edit follow the steps above. Once done select **Save Settings**

Select the supplier statuses used by the company	
Status	
Approved	<input checked="" type="checkbox"/>
In Progress	<input checked="" type="checkbox"/>
Approval In Progress	<input type="checkbox"/>
Suspended	<input type="checkbox"/>
Requires Review	<input checked="" type="checkbox"/>
Delisted	<input checked="" type="checkbox"/>
Temporarily Approved	<input type="checkbox"/>
Partially Approved	<input type="checkbox"/>
Not Supplying	<input type="checkbox"/>

[Save Settings](#)

### 1.1.5 ACCESIBLE DATA – WHAT IT IS

This relates to sharing spec templates, products etc with your suppliers in order for your suppliers to complete external specs. We'll touch on this at a later stage. **But if you only want Admins of hr supplier manager to have access to accessible data tick this box.**

### 1.1.6 SUPPLIER REVIEW FREQUENCY – HOW TO SETUP SUPPLIER REVIEW FREQUENCY

This function allows you to setup a Review Frequency for your suppliers and allows you to setup by supplier types. It will set your suppliers status to In Review.

**This is something you can do at a later stage and can be setup & amended whenever you want**

**Step 1:** Go to **Supplier Manger**, then select **Admin** → **General Admin** → **Supplier Review Frequency** on the left

The screenshot shows the 'Supplier Manager' interface. On the left sidebar, 'Supplier Review Frequency' is highlighted with a red box. In the top right, the 'Admin' dropdown menu is open, showing 'General Admin' as the selected option, also highlighted with a red box. The main table displays a single supplier entry for 'Seafood' with a review start date of '01/03/2021', a frequency of 'Year', and a grace period of '20' days. The 'Active' status is marked with a green checkmark.

**Step 2:** Select Add Review Frequency

This screenshot is similar to the previous one, but the 'Add Review Frequency' button in the 'Optional Fields' section is highlighted with a red box. The 'Admin' dropdown menu remains open, showing 'General Admin' as the selected option.

**Step 3:** Select the **Supplier Type**, the **Review Frequency**, the **Start Date**, any **Grace Period** if you want and then set as **Active**. Select **Save** when done

The screenshot shows the 'Update Supplier Review Frequency' form. The 'Supplier Type' is set to 'Seafood'. The 'Review Frequency' is set to 'Year' via a dropdown menu. The 'Start Date' is '01/03/2021' with a calendar icon. The 'Grace Period' is '20' days. The 'Active' checkbox is checked. At the bottom right, the 'Save' button is highlighted with a red box, next to a 'Cancel' button.

**Step 4:** Your Review Frequencies will look like this below. Repeat steps to add further frequencies for different supplier types. Follow the steps above to Edit your review frequencies.

The screenshot shows the 'Supplier Manager' interface. On the left, there is a sidebar with various options: Visible Columns, Optional Fields, Custom Fields, Active Status, Accessible Data, Supplier Review Frequency (highlighted in blue), Custom Views, and General Settings. The main area displays a table titled 'Use these options to set review frequency for your customer approved lists.' with columns: Supplier Type, Review Start Date, Review Frequency, Grace Period (Days), Last Run Date, Active, and an edit icon. A table entry is shown for 'Seafood' with a review start date of '01/03/2021', a frequency of 'Year', a grace period of '20' days, and an active status indicated by a green checkmark. Above the table, there are buttons for 'Add Review Frequency' and 'Delete Selected'. An 'Admin' dropdown menu is open, showing options: General Admin, Compliance Setup, and Supplier Share Groups.

Supplier Type	Review Start Date	Review Frequency	Grace Period (Days)	Last Run Date	Active	
Seafood	01/03/2021	Year	20		✓	

### 1.1.7 CUSTOM VIEWS – HOW TO CREATE & SETUP CUSTOM VIEWS

Custom views allow you to setup specific views of your supplier list that may be more specific to your department or area that you work in. These views are built using the existing columns or custom fields you create.

**This is something you can do at a later stage and can be setup & amended whenever you want**

**Step 1:** Go to **Supplier Manger**, then select **Admin** → **General Admin** → **Custom Views** on the left

The screenshot shows the 'Supplier Manager' interface. On the left, the 'Custom Views' option is highlighted with a red box. The main area displays buttons for 'Add View', 'Save Changes', and 'Discard Changes'. An 'Admin' dropdown menu is open, showing options: General Admin, Compliance Setup, and Supplier Share Groups. The 'General Admin' option is highlighted with a red box.

## Step 2: Select Add View

**Supplier Manager**

Supplier List | Supplier Attributes | Compliance | Contacts List | Supply Chain Map | Maps | Activity Overview | Admin

Visible Columns **Add View** Save Changes Discard Changes

Optional Fields

Custom Fields

Active Status

Accessible Data

Supplier Review Frequency

**Custom Views**

General Settings

General Admin  
Compliance Setup  
Supplier Share Groups

## Step 3: Name the view, select Next

Add View

**Name**

Create the view name.

Custom View 1

Cancel

Next >

**Step 4:** Now drag & drop the columns you want to see in your view. When done select **Next**

**Add View** ×

**Columns**

Assign columns that will be visible in the view.

**Available Columns**

- Supplier Site
- Company Name
- Factory Code
- Country
- Company Ref
- Last Audit Details
- Audit Frequency
- Supplied Via

**Selected Columns: 5**

1. Supplier Type
2. Supplier Subtype
3. Under Exception
4. Accreditations
5. Sedex

Cancel ◀ Previous **Next ▶**

**Step 5:** Now select **filters** that will always be applied on this view. Select **Next** when done

**Add View** ×

Define filters that will always be applied on the view.

Supplier Site All selected (10)	Country All selected (14)	Supplied Via All selected (16)
Status All	Compliant Level All	Lead Technical All
Lead Commercial All	Linked Customers All	Site Relationship All
Supplier Type All	Supplier Subtype All	Business Activity All
Business Sub Activity All	Business Type All	Business Sub Type All
Under Exception Under Exception		

Cancel ◀ Previous **Next ▶**

**Step 6:** Now select **filters** that are specific to you the user. These will only be visible for you. Select **Next** when done

Add View ×

### User Filters

Define user filters for the view.

- ☒ Supplier Type
- ☒ Supplier Subtype
- ☐ Business Type
- ☐ Business Sub Type
- ☐ Under Exception

Cancel ● ● ● ● ● < Previous Next >

**Step 7:** Now select the users/teams that will have visibility of this view. Select **Next** when done

Add View ×

### User/Team Visibility

Choose users/teams that will have visibility of this custom view.

Select Users/Teams

Q Search user/team names...

- ☐ -- Group Teams --
- ☒ Agri Team
- ☒ Commercial
- ☐ Group H&S Team
- ☐ HR
- ☐ Maintenance
- ☐ Night Shift
- ☐ Production Team

Cancel ● ● ● ● ● < Previous Next >

**Step 8:** Now review your custom view. Select Previous if not correct to amend. When done, select **Submit**

**Add View** ✕

---

**Summary**

Summary of all options filled/selected.

---

**Name** Custom View 1

---

**Columns** 1. Supplier Type 2. Supplier Subtype 3. Under Exception 4. Accreditations 5. Sedex

---

**Admin Filters** Supplier Site Country Supplied Via Under Exception

---

**User Filters** Supplier Type Supplier Subtype

---

**User/Team Visibility** Agri Team Commercial

---

Cancel ● ● ● ● ● ● ◀ Previous Submit

### Step 9: Your custom views will look like this below

**Supplier Manager**

Supplier List Supplier Attributes Compliance Contacts List Supply Chain Map Maps Activity Overview Admin

---

Visible Columns ➕ Add View 💾 Save Changes ✕ Discard Changes

Optional Fields

1	Custom View 1	Default	Active	<span>✎</span>	<span>🗑</span>
---	---------------	---------	--------	----------------	----------------

Custom Fields

Active Status

Accessible Data

Supplier Review Frequency

**Custom Views**

General Settings

### Step 10:

**Default:** Toggle to set as **Default** view Default

**Active or Not Active:** Toggle to set this view as **Active** or **Not Active** Not Active

**Edit View:** To **Edit** select the **Edit** button ✎ and follow steps above

**Delete view:** To **delete** view select **delete** button 🗑

## Step 11: Now to see this view work, select **Supplier List**

**Supplier Manager**

**Supplier List** | Supplier Attributes | Compliance | Contacts List | Supply Chain Map | Maps | Activity Overview | Admin

Visible Columns: [Add View](#) [Save Changes](#) [Discard Changes](#)

Optional Fields: 1 Custom View 1 [Default](#) [Active](#) [Edit](#) [Delete](#)

Custom Fields

Active Status

Accessible Data

Supplier Review Frequency

**Custom Views**

General Settings

## Step 12: As you can see the custom views now appear. Simply select them to view.

**Supplier Manager**

**Supplier List** | Supplier Attributes | Compliance | Contacts List | Supply Chain Map | Maps | Activity Overview | Admin

**Default** | Custom View 1

Site: Democo (Group) Supplier Type: All Status: All Country: All Search: Search... [Filter](#) [Clear Filters](#)

Supplier Sub Type: All Supplied Via: All Lead Technical: All Compliant Level: All

Business Activity: Food Business Sub Activity: All Under Exception: All

[Add New](#) [Detail Reports](#) [Export to Excel](#) [Summary Report](#) [Bulk Update](#) [Map View](#) [Via Chain View](#) [Attributes](#) Viewing 9 results: Page 1 of 1

	Factory Code(s)	Company Name	Country	Supplier Type	Supplier Sub Type	Lead Technical	Under Exception	Supplied Via	Linked Customer	Status	Compliant	
<input type="checkbox"/>	US 323232	Abattoir 1	United States	Meat Processor	Beef, Lamb, Pork	Steve Jones				Approved	Compliant	<a href="#">View</a>
<input type="checkbox"/>	NZ 347761	ABC Snacks Ltd	United Kingdom	Snacks	Biscuits & Cakes	Steve Jones				Approved	Compliant	<a href="#">View</a>

## Step 13: See view below

**Supplier Manager**

**Supplier List** | Supplier Attributes | Supplier Approval | Compliance | Contacts List | Supply Chain Map | Supplier Listing | Maps | Activity Overview | Admin

**Default** | **Custom View 1**

Search:  [Filters](#)

[Add New](#) [More](#) [First](#) [1](#) [Last](#) [Size: 50](#) Page: 1 of 3; Rows: 1-50 of 129

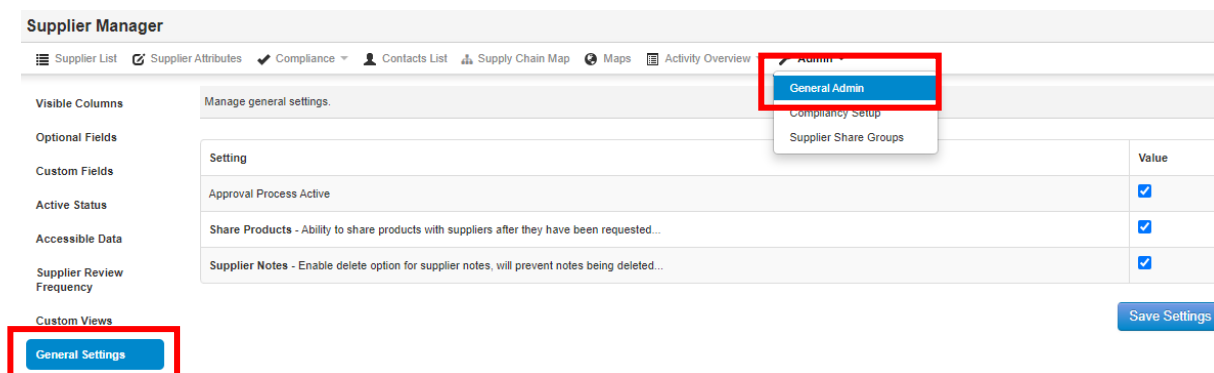
	Company Name	Factory Code	Status	Compliant Level	BRC Global Standard	Sedex	Supplier Type
<input type="checkbox"/>	Abattoir 1	US 323232			1234567		
<input type="checkbox"/>	ABC Laboratories	1234					
<input type="checkbox"/>	ABC Snacks Ltd	NZ 347761					
<input type="checkbox"/>	Acme Food Co						
<input type="checkbox"/>	Acorn Produce	EC 343434					
<input type="checkbox"/>	Agent						
<input type="checkbox"/>	Agent - Farmer 2						



### 1.1.8 GENERAL SETTINGS – WHAT THEY ARE & SETUP

In general settings you can turn on or off the **Supplier Approval Process**, **Share Products & Supplier Notes**. Select **Save Settings** when done

**Step 1:** Go to **Supplier Manger**, then select **Admin** → **General Admin** → **General Settings** on the left



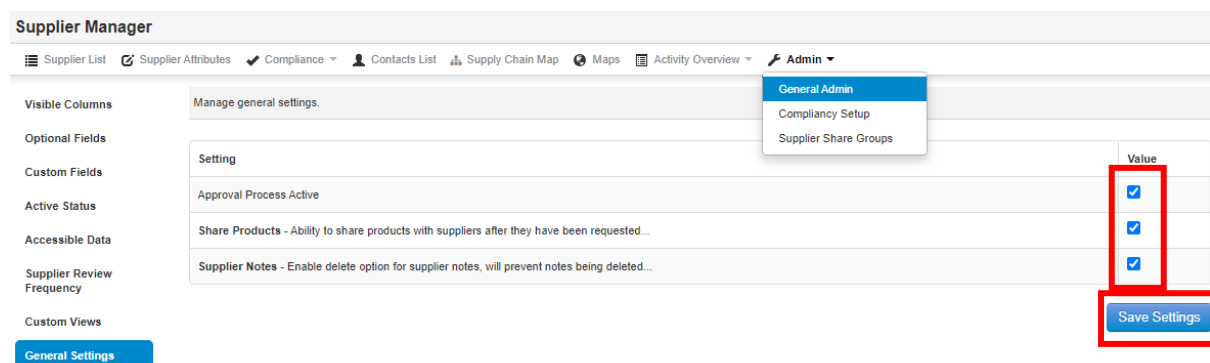
This is something you can do at a later stage and can be setup & amended whenever you want

**Supplier Approval Process:** Allows you to create a specific process & rules in Foods Connected in order to approve your suppliers. Turn on or off

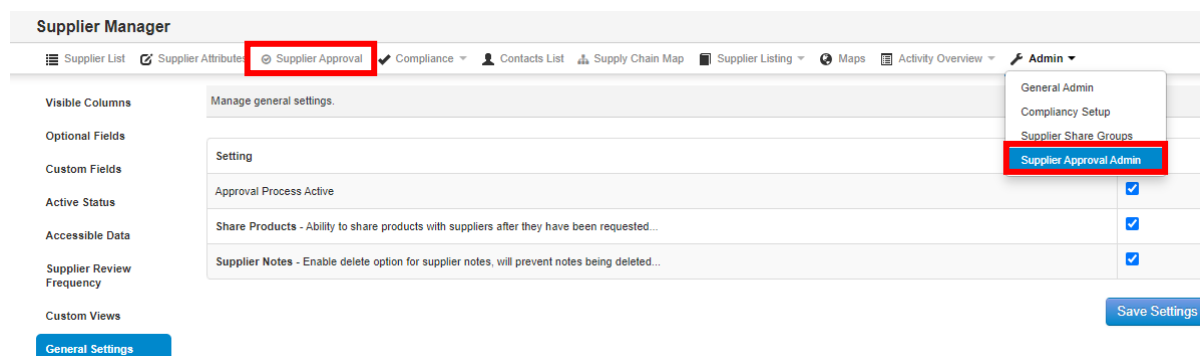
**Share Products:** Ability to share products with suppliers after they have been requested. When you add a new supplier you can share products & spec templates with them in one go instead of retrospectively doing this. (Will touch on this later in the guide 2.1.1 & 2.1.2) Turn on or off

**Supplier Notes:** Enable delete option for supplier notes, will prevent notes being deleted (Will touch on this later in the guide) Turn on or off

**Step 2:** To turn these features on, tick box then select **Save Settings** when done.



**Step 3:** As you can see the Supplier Approval Process Tab now appears in your Supplier Manager & new tab under Admin. (We will touch on the setup of this later in the guide)



## 1.2 COMPLIANCY SETUP – HOW TO CREATE & SETUP

Compliance rules can be set up to monitor your suppliers/supplier types performance on an ongoing basis. E.g., All Documents & Specifications must be signed off, Audits & Complaints responded to & Questionnaires completed. This process is colour coded and allows you to address under performing Suppliers. Supplier Compliance Rules will be triggered when you add a new supplier (after a supplier goes through the Supplier Approval Process if you have this setup)

Rules can be made as specific as needed or more overarching. The more specific you make it the less automatic the rules become

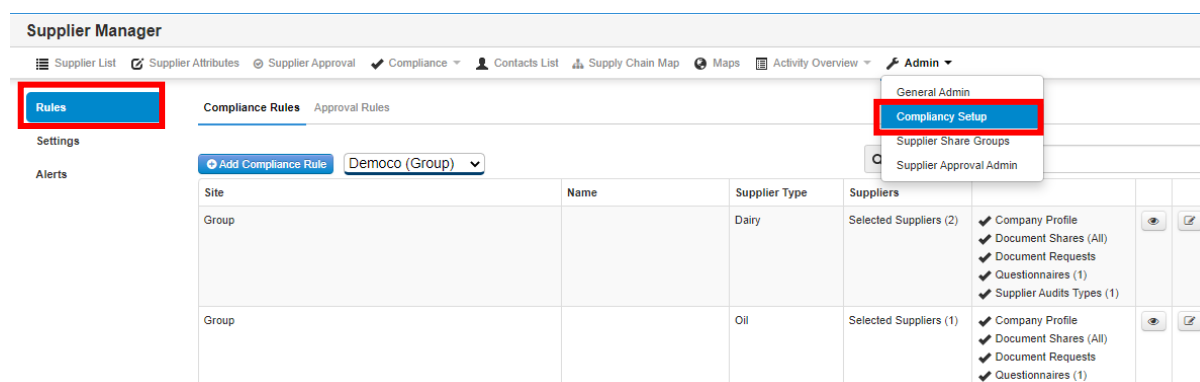
One best way is to setup rules based on the supplier types. Say if you need the same info from Ingredient & Meat & Poultry supplier types select them to be in the rule. We will use this scenario in this guide.

If you need to discuss rules further, please speak to the custom support team.

**Note: You can only use the compliance types or tools that you have subscribed too in order to use those as an option for Compliance Rules & Supplier Approval Process**

### 1.2.1 COMPLIANCE RULES – HOW TO CREATE & SETUP

**Step 1:** Select **Admin** → **Compliance Setup** → **Rules**



## Step 2: Select Add Compliance Rules

The screenshot shows the 'Supplier Manager' interface. The 'Compliance Rules' tab is selected. A red box highlights the 'Add Compliance Rule' button. A dropdown menu is open for 'Democo (Group)', showing options: 'General Admin', 'Compliance Setup', 'Supplier Share Groups', and 'Supplier Approval Admin'. The table below shows two rows for 'Group' under 'Dairy' and 'Oil' supplier types, with 'Selected Suppliers' counts and a list of compliance items.

Site	Name	Supplier Type	Suppliers	Compliance Items
Group		Dairy	Selected Suppliers (2)	<input checked="" type="checkbox"/> Company Profile <input checked="" type="checkbox"/> Document Shares (All) <input checked="" type="checkbox"/> Document Requests <input checked="" type="checkbox"/> Questionnaires (1) <input checked="" type="checkbox"/> Supplier Audits Types (1)
Group		Oil	Selected Suppliers (1)	<input checked="" type="checkbox"/> Company Profile <input checked="" type="checkbox"/> Document Shares (All) <input checked="" type="checkbox"/> Document Requests <input checked="" type="checkbox"/> Questionnaires (1)

## Step 3:

- Give a **Description** of the rule.
- Then select **Rule Type** as **Compliance**. This means the rule type relates to this ongoing compliance rule.
- Select which **Site(s)** you want to set the compliance rule for or if you only have 1 site it will be for that site.

**Note – A Supplier that may fall under more than one compliance rule can be set up for multiple rules at the same time**

The screenshot shows the 'Details' form for a compliance rule. The 'Description' field is 'Standard Suppliers'. The 'Rule Type' is 'Compliance'. The 'Site' dropdown is open, showing 'Democo (Group)' selected, with other options like 'Factory 1', 'Factory 2', 'Factory 3', 'Factory 4', 'Packaging', and 'Clothing'.

- Now select the **Supplier Type**

The screenshot shows the 'Supplier Type' selection form. The 'Currently selected' dropdown shows 'Ingredients, Meat'. The 'Search by Supplier Sub Type...' dropdown is open, showing 'Ingredients' and 'Meat' selected, with other options like 'Internal', 'Kitchen Appliances', 'Laboratory', 'Meat Processor', and 'Meat Retail Packer'.

**Step 4:** As you can see you can select Sub type, Business activity, Business Sub Activity & Country to really specify your rule further.

**Step 5:** On Supplier Status, select the statuses that this will be active or apply on. So really a compliance rule only needs to apply when a supplier is **Approved, In Progress, Requires Review**. It doesn't need to apply when a supplier is delisted.

Supplier Status

- ☒ Approved
- ☐ In Progress
- ☒ Requires Review
- ☐ Delisted

**Step 6:** As you can see any custom fields you created and activated will also appear here to allow you to set your compliance rules further. So, if you need to select anything here to further specify your rule, please do.

Under Exception

-- Please Select --

**Step 7:** When done, select **Save & Save**

Under Exception

-- Please Select --

Cancel

Save

Save

Save & Exit

**FOODS**

**Step 8:** Now select, **Select Tools**

Details **Select Tools** select Suppliers

Description

Rule Type ☒ Compliancy ☐ Approval Process

Site

☒ Democo (Group)

☐ Factory 1

☐ Factory 2

☐ Factory 3

☐ Factory 4

☐ Packaging

☐ Clothing

**Step 9:** Now select the tools that you want to make up your rule.

**You can only use the compliance types which are tools on Foods Connected that you have subscribed too. So if you haven't subscribed to Supplier Document Manager you can't use Document Shares as part of the compliance rules, so on and so forth.**

Details <b>Select Tools</b> Select Suppliers	
<b>Company Profile</b> Supplier must confirm that the details in their company profile are correct and up-to-date.	<input type="checkbox"/> Every <input type="text" value="12"/> Months
	<input type="checkbox"/> Include supplied via an agent
<b>Accreditations</b>	<input type="checkbox"/>
<b>Document Shares</b> All documents that require sign off must be signed off.	<input type="checkbox"/>
<b>Document Requests</b> All requested mandatory documents must be uploaded and not past their expiry date.	<input type="checkbox"/>
<b>Questionnaires</b> All shared supplier questionnaires must be responded to.	<input type="checkbox"/>
<b>Supplier Audits</b> Audit items in shared supplier audits must be responded to.	<input type="checkbox"/>
<b>Supplier Checks</b> All shared supplier checks must be responded to.	<input type="checkbox"/>
<b>Specifications</b> All company specifications that require sign off must be signed off.	<input type="checkbox"/>
<b>External Specifications</b> <input checked="" type="radio"/> Not included in specification compliancy <input type="radio"/> All external specifications that require sign off must be signed off <input type="radio"/> All external specifications that require completion must be completed	
<b>Traceability Checks</b> All shared traceability checks must be responded to.	<input type="checkbox"/>
<b>Risk Assessments</b> All Risk Assessments must be responded to.	<input type="checkbox"/>
<b>Customer Approved Lists</b> Outstanding Customer Approved Lists must be reviewed.	<input type="checkbox"/>

**Step 10:** As you select your rules you can see tabs appear for them above. When done select **Save**

**Note:** On Company Profile, By not selecting Include supplied via agent this means that the system will not set this as a rule for suppliers supplied via agents. Because these suppliers may not have anyone to update their profile as you are dealing directly with the agent.

Details	Select Tools	Select Suppliers	Document Requests	Questionnaires	Audit Types	Supplier Checks	Traceability Checks	Risk Assessments	Document Shares	Accreditations
<b>Company Profile</b> Supplier must confirm that the details in their company profile are correct and up-to-date. <input checked="" type="checkbox"/> Every 12 Months										
<input type="checkbox"/> Include supplied via an agent										
<b>Accreditations</b> <input checked="" type="checkbox"/>										
<b>Document Shares</b> All documents that require sign off must be signed off. <input checked="" type="checkbox"/>										
<b>Document Requests</b> All requested mandatory documents must be uploaded and not past their expiry date. <input checked="" type="checkbox"/>										
<b>Questionnaires</b> All shared supplier questionnaires must be responded to. <input checked="" type="checkbox"/>										
<b>Supplier Audits</b> Audit items in shared supplier audits must be responded to. <input checked="" type="checkbox"/>										
<b>Supplier Checks</b> All shared supplier checks must be responded to. <input checked="" type="checkbox"/>										
<b>Specifications</b> All company specifications that require sign off must be signed off. <input type="checkbox"/>										
<b>External Specifications</b> <input type="radio"/> Not included in specification compliancy <input checked="" type="radio"/> All external specifications that require sign off must be signed off <input type="radio"/> All external specifications that require completion must be completed										
<b>Traceability Checks</b> All shared traceability checks must be responded to. <input checked="" type="checkbox"/>										
<b>Risk Assessments</b> All Risk Assessments must be responded to. <input checked="" type="checkbox"/>										
<b>Customer Approved Lists</b> Outstanding Customer Approved Lists must be reviewed. <input checked="" type="checkbox"/>										

**(Step 11:** If you need a rule to be really specific to a few suppliers you can select the Suppliers tab and set those suppliers (But we do not recommend this unless you really need to as this, as this means the rules need to be managed manually. Speak to customer support on this)

**Step 12:** Now you select the tools that form part of your rules in order to set them up & pre-set.

**In this guide we will look at all the tools that can be set as compliance rule.**

#### 1.2.1.1 Document Requests – How to setup & select

This is where you setup & select the documents you will need from your suppliers based on this rule. Documents like BRC certs, Allergen control procedures etc.

**Step 1:**

- **Compliance type:** Is this rule for all documents selected or only 1 selected.

- **Send Document Requests:** When yes is selected any new suppliers you add to the system the documents that you have loaded here will be automatically requested from the suppliers
  - **Category:** What category of document to load
  - **Document Type:** What is the document type from the category above
  - **Comments:** Add any helpful comments
  - **Mandatory:** Select yes or no
  - **Must have an expiry date:** Select yes or no
  - **Must have a document grade:** Select yes or no
  - **Certification number required:** Select yes or no
  - **Request from:** Choose what is appropriate for your rule
- Supplier:** Will request documents directly from the supplier  
**Via suppliers:** Will request documents from agents only  
**Via suppliers if exists:** Will request documents from agents if they exist (Recommended)

Details	Select Tools	Select Suppliers	Document Requests	Questionnaires	Audit Types	Supplier Checks	Traceability Checks	Risk Assessments	Document Shares	Accreditations	
Compliance Type <input checked="" type="radio"/> All Documents <input type="radio"/> Any One Selected Document											
Send Document Requests			Yes								
Group or Site Document			Yes								
Category			Accreditations & Memberships								
Document Type			--- BRC								
Comments			<div>Helpful comments</div>								
Mandatory			Yes								
Must have Expiry Date?			<input checked="" type="checkbox"/>								
Must Have Document Grade?			<input checked="" type="checkbox"/>								
Certification Number Required?			<input checked="" type="checkbox"/>								
Request From			Via Suppliers If Exists								
<div>+ Add Document</div>											
Document	Comments	Mandatory	Request From	Must Have Expiry Date	Must Have Document Grade	Certification Number Required					
No required documents added...											
										Cancel	Save

## Step 2: Now select Add Document

<div>+ Add Document</div>											
Document	Comments	Mandatory	Request From	Must Have Expiry Date	Must Have Document Grade	Certification Number Required					
No required documents added...											
										Cancel	Save

**Step 3:** Your document is now pre-loaded. And looks like this below. Follow steps above to add further documents to this rule. Select **Save** when done

[+ Add Document](#)

Document	Comments	Mandatory	Request From	Must Have Expiry Date	Must Have Document Grade	Certification Number Required	
--- BRC	Helpful comments	Yes	Via Suppliers If Exist	Yes	Yes	Yes	Remove

[Cancel](#)
[Save +](#)

**Step 4:** At any stage you need to remove this document select **Remove**.

[+ Add Document](#)

Document	Comments	Mandatory	Request From	Must Have Expiry Date	Must Have Document Grade	Certification Number Required	
--- BRC	Helpful comments	Yes	Via Suppliers If Exist	Yes	Yes	Yes	Remove

[Cancel](#)
[Save +](#)

### 1.2.1.2 Questionnaires – How to setup & select

This is where you setup & select the questionnaires you want your suppliers to complete based on this rule.

**Step 1:**

**All Questionnaires:** All questionnaires in the questionnaire manager form part of the rule. Select **Save** when done

[Details](#)
[Select Tools](#)
[Select Suppliers](#)
[Document Requests](#)
[Questionnaires](#)
[Audit Types](#)
[Supplier Checks](#)
[Traceability Checks](#)
[Risk Assessments](#)
[Additional Rules](#)
[Document Shares](#)
[Accreditations](#)

Questionnaires

☒ All Questionnaires
 ☐ Selected Questionnaires
 ☐ Selected Questionnaire Types

**Selected Questionnaires:** Select the questionnaires that will form part of the rule. Select **Save** when done

[Details](#)
[Select Tools](#)
[Select Suppliers](#)
[Document Requests](#)
[Questionnaires](#)
[Audit Types](#)
[Supplier Checks](#)
[Traceability Checks](#)
[Risk Assessments](#)
[Additional Rules](#)
[Document Shares](#)
[Accreditations](#)

Questionnaires

☐ All Questionnaires
 ☒ Selected Questionnaires
 ☐ Selected Questionnaire Types

[Auto Share Settings](#)

Q Search By Questionnaire Name...

<input checked="" type="checkbox"/>	Services Questionnaire (Ex/Col)
<input checked="" type="checkbox"/>	Cold Store Questionnaire
<input checked="" type="checkbox"/>	New Supplier Questionnaire (DR, S, Tri, Pag)
<input type="checkbox"/>	Agent/Broker Details questionnaire (DR, S, Tri, Freq)
<input type="checkbox"/>	Supplier Performance Evaluation
<input type="checkbox"/>	Supplier Volumes
<input type="checkbox"/>	Supplier Sustainability Questionnaire



**Auto Share:** Selecting auto share allows you to set the sharing of these questionnaires automatically.

- **Auto Share:** Turn on or Off
- **Response By:** Supplier needs to respond by what you set here
- **Secondary Title:** Add secondary title if needed
- **Message:** Include a message if needed
- **Request from:** Choose what is appropriate for your rule  
**Supplier:** Will request documents directly from the supplier  
**Via suppliers:** Will request documents from agents only  
**Via suppliers if exists:** Will request documents from agents if they exist (Recommended)

Auto Share Questionnaire Settings

Auto Share Questionnaire Settings

Auto Share: Yes

Response By: 3 Weeks

Secondary Title: Secondary Title (Optional)...

Message To Include With Email: Message

Request From: Via Suppliers If Exists

Close

**Selected Questionnaire Types:** Select the questionnaire types that will form part of the rule. Select **Save** when done

Details Select Tools Select Suppliers Document Requests **Questionnaires** Audit Types Supplier Checks Traceability Checks Risk Assessments Additional Rules Document Shares Accreditations

Questionnaires ☐ All Questionnaires ☐ Selected Questionnaires ☒ Selected Questionnaire Types Auto Share Settings

Search By Questionnaire Type Name...

<input checked="" type="checkbox"/>	Technical
<input checked="" type="checkbox"/>	Commercial
<input type="checkbox"/>	Financial
<input type="checkbox"/>	SAQ

**Auto Share:** Selecting auto share allows you to set the sharing of these documents automatically.

- **Auto Share:** Turn on or Off
- **Response By:** Supplier needs to respond by what you set here
- **Secondary Title:** Add secondary title if needed
- **Message:** Include a message if needed
- **Request from:** Choose what is appropriate for your rule  
**Supplier:** Will request documents directly from the supplier  
**Via suppliers:** Will request documents from agents only  
**Via suppliers if exists:** Will request documents from agents if they exist (Recommended)



Supplier List

Supplier Attributes

Supplier Approval

Compliance

Contacts List

Supply Chain Map

Maps

Activity Overview

Admin

Details

Select Tools

Select Suppliers

Document Requests

Questionnaires

Audit Types

Supplier Checks

Traceability Checks

Risk Assessments

Additional Rules

Document Shares

Accreditations

Supplier Performance Tracker (DR, S)

Every

12

Months

Preliminary procurement assessment

Every

12

Months

Animal Welfare Checklist

Every

12

Months

Accident Investigation Report

Every

12

Months

#### 1.2.1.5 Traceability Checks – How to setup & select

This is where you setup & select the traceability checks you need to complete on your suppliers based on this rule.

**Step 1:** Select the traceability checks that form part of your rule and set a frequency for them to be done. Select **Save** when done

<div>Supplier List</div> <div>Supplier Attributes</div> <div>Supplier Approval</div> <div>Compliance</div> <div>Contacts List</div> <div>Supply Chain Map</div> <div>Maps</div> <div>Activity Overview</div> <div>Admin</div>											
<div>Details</div> <div>Select Tools</div> <div>Select Suppliers</div> <div>Document Requests</div> <div>Questionnaires</div> <div>Audit Types</div> <div>Supplier Checks</div> <div>Traceability Checks</div> <div>Risk Assessments</div> <div>Additional Rules</div> <div>Document Shares</div> <div>Accreditations</div>											
<input checked="" type="checkbox"/>	Traceability Check (DR, NS)								Every	<div>12</div>	Months
<input checked="" type="checkbox"/>	Fresh Produce Check								Every	<div>12</div>	Months
<input checked="" type="checkbox"/>	Fresh Produce Traceability Check (DR, NS)								Every	<div>12</div>	Months

#### 1.2.1.6 Risk Assessments – How to setup & select

This is where you setup & select the risk assessments you need to complete on your suppliers, based on this rule.

**Step 1:** Select the risk assessments that form part of your rule

**Step 2:** Now select which option below.

- **Single Site:** If you need to do one risk assessment per supplier per site
- **All Sites:** If you have one group risk assessment you can toggle to all sites so that this risk assessment can be done for one supplier for each of your sites.

Details	Select Tools	Select Suppliers	Document Requests	Questionnaires	Audit Types	Supplier Checks	Traceability Checks	Risk Assessments	Additional Rules	Document Shares	Accreditations
<input checked="" type="checkbox"/>	Inherent Risk Assessment (DR, S)							Single Site			
<input checked="" type="checkbox"/>	Packaging Risk Assessment							All Sites			
<input type="checkbox"/>	HACCP DECISION TREE							Single Site			

#### 1.2.1.7 Document Shares – How to setup & select

This is where you setup & select the documents you want to share with your suppliers to sign off on, based on this rule.

## Step 1:

**All Documents:** All documents in the Supplier document manager form part of the rule. Select **Save** when done

Document Shares

☒ All Documents ☐ Selected Documents ☐ Selected Document Categories

**Selected Documents:** Select the documents that will form part of the rule. Select **Save** when done

Document Shares

☐ All Documents ☒ Selected Documents ☐ Selected Document Categories

Auto Share Settings

Search By Document Name...

Show Selected Documents Only: ☐ No

<input checked="" type="checkbox"/>	Glass Brittle Procedure
<input checked="" type="checkbox"/>	Technical Conditions of Supply
<input checked="" type="checkbox"/>	Technical Conditions of supply ingredients
<input checked="" type="checkbox"/>	Organisational Structure
<input type="checkbox"/>	Supplier Non-Conformance Procedure

**Auto Share:** Selecting auto share, allows you to set the sharing of these documents automatically.

- **Auto Share Documents:** Turn on or Off
- **Requires Sign off:** Yes or no
- **Sign off Required By:** Supplier needs to sign off the document by what you set here
- **Sign off Frequency:** Set the Frequency
- **Declaration:** Use supplier or custom declaration (Refer to Supplier doc manager guide)
- **Receive Signed Off Notification Mail:** Yes or no
- **Notify Recipients by Email:** Yes or no
- **Message:** Add message
- **Request from:** Choose what is appropriate for your rule
  - Supplier:** Will request documents directly from the supplier
  - Via suppliers:** Will request documents from agents only
  - Via suppliers if exists:** Will request documents from agents if they exist (Recommended)

## Auto Share Document Settings

Auto Share Documents	Yes
Requires Sign Off	Yes
Sign Off Required By	2 Weeks
Sign Off Frequency	Yearly
Declaration	Use Supplier Declaration
Receive Signed Off Notification Email	Yes
Notify Recipients By Email	Yes
Message To Include With Email	<input type="text" value="Enter a message..."/>
Request From	Via Suppliers If Exists

Close

**Selected Document Categories:** Select the document categories that will form part of the rule. Select **Save** when done

Details Select Tools Select Suppliers Document Requests Questionnaires Audit Types Supplier Checks Traceability Checks Risk Assessments Additional Rules **Document Shares** Accreditations

Document Shares ☐ All Documents ☐ Selected Documents ☒ Selected Document Categories Auto Share Settings

Show Selected Categories Only: ☐ No

<input checked="" type="checkbox"/>	Technical
<input checked="" type="checkbox"/>	Commercial
<input type="checkbox"/>	Technical conditions of supply
<input type="checkbox"/>	Sustainability
<input type="checkbox"/>	Maintenance

**Auto Share:** Selecting auto share, allows you to set the sharing of these documents automatically.

- **Auto Share Documents:** Turn on or Off
- **Requires Sign off:** Yes or no
- **Sign off Required By:** Supplier needs to sign off the document by what you set here
- **Sign off Frequency:** Set the Frequency
- **Declaration:** Use supplier or custom declaration (Refer to Supplier doc manager guide)
- **Receive Signed Off Notification Mail:** Yes or no
- **Notify Recipients by Email:** Yes or no
- **Message:** Add message
- **Request from:** Choose what is appropriate for your rule
  - Supplier:** Will request documents directly from the supplier
  - Via suppliers:** Will request documents from agents only
  - Via suppliers if exists:** Will request documents from agents if they exist (Recommended)

## Auto Share Document Settings

Auto Share Documents	Yes
Requires Sign Off	Yes
Sign Off Required By	2 Weeks
Sign Off Frequency	Yearly
Declaration	Use Supplier Declaration
Receive Signed Off Notification Email	Yes
Notify Recipients By Email	Yes
Message To Include With Email	<input type="text" value="Enter a message..."/>
Request From	Via Suppliers If Exists

Close

### 1.2.1.8 Accreditations – How to setup & select

This is where you setup & select the accreditations you want to request from your suppliers to confirm that they have, based on this rule.

#### Step 1:

**Accreditation Body:** Select the accreditation body from the dropdown

**Condition:** Select is the rule based on Grade or Expiry date is valid

**Mandatory:** Yes or no – This means they must enter and is a required field

**Comments:** Add any requesting comments

Details	Select Tools	Select Suppliers	Document Requests	Questionnaires	<b>Audit Types</b>	Supplier Checks	Traceability Checks	Risk Assessments	Additional Rules	Document Shares	<b>Accreditations</b>
Accreditation Body		BRC Global Standard									
Condition		Field: Grade Values: A (e.g. )									
Mandatory		Yes									
Comments		<input type="text" value="Please submit"/>									
<input type="button" value="+ Add"/>											
Accreditation		Condition		Comments		Mandatory?					
No required accreditations added...											

#### Step 2: When done select Add

Details Select Tools Select Suppliers Document Requests Questionnaires **Audit Types** Supplier Checks Traceability Checks Risk Assessments Additional Rules Document Shares **Accreditations**

Accreditation Body BRC Global Standard

Condition  
Field: Grade  
Values: A (e.g.)

Mandatory Yes

Comments Please submit

+ Add

Accreditation	Condition	Comments	Mandatory?
No required accreditations added...			

**Step 3:** Your accreditation is now pre-loaded. And looks like this below. Follow steps above to add further accreditations to this rule. Select **Save** when done

+ Add

Accreditation	Condition	Comments	Mandatory?	
BRC	Filtered by Grade: A	Please submit	Yes	<span>Remove</span>

Delete Cancel Save

**Step 4:** At any stage you need an accreditation, select **Remove**.

+ Add

Accreditation	Condition	Comments	Mandatory?	
BRC	Filtered by Grade: A	Please submit	Yes	<span>Remove</span>

Delete Cancel Save

**Step 5:** At any stage you want to delete this part of your rule, select **Delete**

[+ Add](#)

Accreditation	Condition	Comments	Mandatory?	
BRC	Filtered by Grade: A	Please submit	Yes	<a href="#">Remove</a>

[Delete](#)

[Cancel](#)
[Save](#)

### 1.2.1.9 Additional Rules – How to create & setup

This is where you create & setup simple custom additional rules, that you can ask yourself about the supplier when you add them, based on this rule.

**Step 1:** An **Additional Rules** tab will appear. This allows you to add customisable questions that you can create that you might ask your suppliers. Select **Additional Rules**

Details Select Tools Select Suppliers Document Requests Questionnaires Audit Types Supplier Checks Traceability Checks Risk Assessments **Additional Rules** Document Shares Accreditations

Additional Rule Description... [+](#)

**Step 2:** Add in your question or rule and select the **Green** icon. **Repeat steps to add more rules**

Supplier Manager - Edit Rule [← Back to Rules List](#)

Supplier List Supplier Attributes Supplier Approval Compliance Contacts List Supply Chain Map Supplier Listing Maps Activity Overview Admin

Details Select Tools Select Suppliers Document Requests **Questionnaires** Audit Types Supplier Checks Traceability Checks Risk Assessments Additional Rules Document Shares Accreditations

Add question here? [+](#)

**Step 3:** When you are done your added rules will look like this below. You can delete and add new ones using the steps above. Select **Save** when done

Supplier Manager - Edit Rule [← Back to Rules List](#)

Supplier List Supplier Attributes Supplier Approval Compliance Contacts List Supply Chain Map Supplier Listing Maps Activity Overview Admin

Details Select Tools Select Suppliers Document Requests Questionnaires Audit Types Supplier Checks Traceability Checks Risk Assessments **Additional Rules** Document Shares Accreditations

Additional Rule Description... [+](#)

Add question here? [-](#)



### 1.2.1.10 Completed Compliance Rules

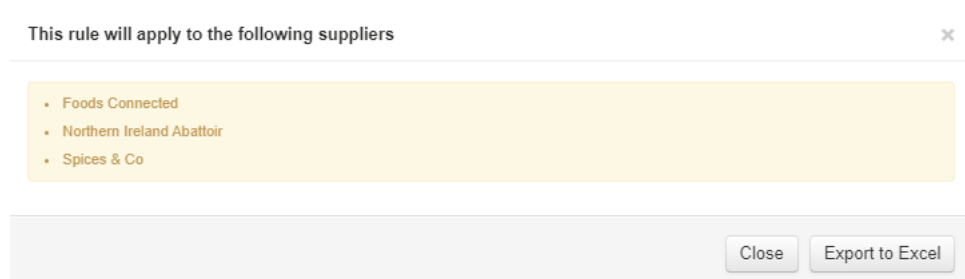
**Step 1:** Once you have done adding all your **Compliance Rules & Additional Rules** your table will look like below. You can edit these at any time. Click on the edit button beside each rule and follow steps above to change. You can also filter your rules by site as you may have different rules setup for some sites.

Supplier Manager							
<a href="#">Supplier List</a> <a href="#">Supplier Attributes</a> <a href="#">Supplier Approval</a> <a href="#">Compliance</a> <a href="#">Contacts List</a> <a href="#">Supply Chain Map</a> <a href="#">Supplier Listing</a> <a href="#">Maps</a> <a href="#">Activity Overview</a> <a href="#">Admin</a>							
<b>Rules</b> <span>Compliance Rules</span> <span>Approval Rules</span>							
Settings	<a href="#">Add Compliance Rule</a> <span>Democo (Group)</span> <input type="text" value="Search..."/>						
Alerts							
Site	Name	Supplier Type	Suppliers				
Group		Dairy	Selected Suppliers (2)	<input checked="" type="checkbox"/> Company Profile <input checked="" type="checkbox"/> Document Shares (All) <input checked="" type="checkbox"/> Document Requests <input checked="" type="checkbox"/> Questionnaires (1) <input checked="" type="checkbox"/> Supplier Audits Types (1)			
Group		Oil	Selected Suppliers (1)	<input checked="" type="checkbox"/> Company Profile <input checked="" type="checkbox"/> Document Shares (All) <input checked="" type="checkbox"/> Document Requests <input checked="" type="checkbox"/> Questionnaires (1)			
Group		Salt	Selected Suppliers (1)	<input checked="" type="checkbox"/> Company Profile <input checked="" type="checkbox"/> Document Shares (All) <input checked="" type="checkbox"/> Document Requests <input checked="" type="checkbox"/> Questionnaires (1)			
Group		Vegetables	Selected Suppliers (3)	<input checked="" type="checkbox"/> Company Profile <input checked="" type="checkbox"/> Document Shares (All) <input checked="" type="checkbox"/> Document Requests <input checked="" type="checkbox"/> Questionnaires (1)			

**Step 2:** If you select this preview button it shows all the suppliers that will fall into the rule. This is a good way of checking if you have setup your rules correctly.

Supplier Manager							
<a href="#">Supplier List</a> <a href="#">Supplier Attributes</a> <a href="#">Supplier Approval</a> <a href="#">Compliance</a> <a href="#">Contacts List</a> <a href="#">Supply Chain Map</a> <a href="#">Supplier Listing</a> <a href="#">Maps</a> <a href="#">Activity Overview</a> <a href="#">Admin</a>							
<b>Rules</b> <span>Compliance Rules</span> <span>Approval Rules</span>							
Settings	<a href="#">Add Compliance Rule</a> <span>Democo (Group)</span> <input type="text" value="Search..."/>						
Alerts							
Site	Name	Supplier Type	Suppliers				
Group		Dairy	Selected Suppliers (2)	<input checked="" type="checkbox"/> Company Profile <input checked="" type="checkbox"/> Document Shares (All) <input checked="" type="checkbox"/> Document Requests <input checked="" type="checkbox"/> Questionnaires (1) <input checked="" type="checkbox"/> Supplier Audits Types (1)			
Group		Oil	Selected Suppliers (1)	<input checked="" type="checkbox"/> Company Profile <input checked="" type="checkbox"/> Document Shares (All) <input checked="" type="checkbox"/> Document Requests <input checked="" type="checkbox"/> Questionnaires (1)			
Group		Salt	Selected Suppliers (1)	<input checked="" type="checkbox"/> Company Profile <input checked="" type="checkbox"/> Document Shares (All) <input checked="" type="checkbox"/> Document Requests <input checked="" type="checkbox"/> Questionnaires (1)			
Group		Vegetables	Selected Suppliers (3)	<input checked="" type="checkbox"/> Company Profile <input checked="" type="checkbox"/> Document Shares (All) <input checked="" type="checkbox"/> Document Requests <input checked="" type="checkbox"/> Questionnaires (1)			

### Step 3: View Suppliers



#### 1.2.2 SUPPLIER APPROVAL RULES – HOW TO CREATE & SETUP

If you activate this in General Settings you will see the Supplier Approval Process tab appear. The **Supplier Approval Admin** tab also appears under the Supplier Manager Admin tab. This is where you can configure the Approval Process Setup. **See 1.4**

Rules can also be set up as part of the Supplier Approval Process for a Supplier. This basically means that before your supplier drops into your supplier list, the supplier must go through the approval process or the rules you have setup and specify below. It is the same setup as the compliance rules.

That means all Documents & Specifications must be signed off, Audits & Complaints responded to & Questionnaires completed. This process is colour coded and allows you to address under performing Suppliers. Supplier Approval Process will be triggered when you add a new supplier

Rules can be made as specific as needed or more overarching. The more specific you make it the less automatic the rules become

One best way is to setup rules based on the supplier types. Say if you need the same info from Ingredient & Meat & Poultry supplier types select them to be in the rule. We will use this scenario in this guide.

If you need to discuss rules further, please speak to the custom support team.

**Note: You can only use the compliance types or tools that you have subscribed too in order to use those as an option for Compliance Rules & Supplier Approval Process**

**Step 1: Select Admin → Compliancy Setup → Rules**

**Supplier Manager**

Supplier List | Supplier Attributes | Supplier Approval | Compliance | Contacts List | Supply Chain Map | Maps | Activity Overview | Admin

**Rules** | Compliance Rules | Approval Rules

Settings | Alerts

**Add Compliance Rule** | Democo (Group)

Site	Name	Supplier Type	Suppliers	
Group		Dairy	Selected Suppliers (2)	<input checked="" type="checkbox"/> Company Profile <input checked="" type="checkbox"/> Document Shares (All) <input checked="" type="checkbox"/> Document Requests <input checked="" type="checkbox"/> Questionnaires (1) <input checked="" type="checkbox"/> Supplier Audits Types (1)
Group		Oil	Selected Suppliers (1)	<input checked="" type="checkbox"/> Company Profile <input checked="" type="checkbox"/> Document Shares (All) <input checked="" type="checkbox"/> Document Requests <input checked="" type="checkbox"/> Questionnaires (1)

General Admin | **Compliance Setup** | Supplier Share Groups | Supplier Approval Admin

## Step 2: Select Add Compliance Rules

**Supplier Manager**

Supplier List | Supplier Attributes | Supplier Approval | Compliance | Contacts List | Supply Chain Map | Maps | Activity Overview | Admin

**Rules** | Compliance Rules | Approval Rules

Settings | Alerts

**Add Compliance Rule** | Democo (Group)

Site	Name	Supplier Type	Suppliers	
Group		Dairy	Selected Suppliers (2)	<input checked="" type="checkbox"/> Company Profile <input checked="" type="checkbox"/> Document Shares (All) <input checked="" type="checkbox"/> Document Requests <input checked="" type="checkbox"/> Questionnaires (1) <input checked="" type="checkbox"/> Supplier Audits Types (1)
Group		Oil	Selected Suppliers (1)	<input checked="" type="checkbox"/> Company Profile <input checked="" type="checkbox"/> Document Shares (All) <input checked="" type="checkbox"/> Document Requests <input checked="" type="checkbox"/> Questionnaires (1)

General Admin | **Compliance Setup** | Supplier Share Groups | Supplier Approval Admin

## Step 3:

- Give a **Description** of the rule.
- Then select **Rule Type** as **Compliance**. This means the rule type relates to this ongoing compliance rule.
- Select which **Site(s)** you want to set the compliance rule for or if you only have 1 site it will be for that site.

**Note – A Supplier that may fall under more than one compliance rule can be set up for multiple rules at the same time**

**Details** | Select Tools | Select Suppliers

Description: Standard Suppliers

Rule Type: ☒ Compliance ☐ Approval Process

Site: Currently selected: Democo (Group)

Search by Site

- ☒ Democo (Group)
- ☐ Factory 1
- ☐ Factory 2
- ☐ Factory 3
- ☐ Factory 4
- ☐ Packaging
- ☐ Clothing

- Now select the **Supplier Type**

Supplier Type

Currently selected: Ingredients, Meat

Search by Supplier Sub Type...

- ☒ Ingredients
- ☐ Internal
- ☐ Kitchen Appliances
- ☐ Laboratory
- ☒ Meat
- ☐ Meat Processor
- ☐ Meat Retail Packer

**Step 4:** As you can see you can select Sub type, Business activity, Business Sub Activity & Country to really specify your rule further.

**Step 5:** On Supplier Status, select the statuses that this will be active or apply on. So really a compliance rule only needs to apply when a supplier is **Approved, In Progress, Requires Review**. It doesn't need to apply when a supplier is delisted.

Supplier Status

- ☒ Approved
- ☐ In Progress
- ☒ Requires Review
- ☐ Delisted

**Step 6:** As you can see any custom fields you created and activated will also appear here to allow you to set your compliance rules further. So, if you need to select anything here to further specify your rule, please do.

Under Exception

-- Please Select --

**Step 7:** When done, select **Save & Save**

Under Exception

-- Please Select --

Cancel

Save

Save

Save & Exit

**FOODS**

## Step 8: Now select, **Select Tools**

Details
Select Tools
Select Suppliers

Description
Standard Suppliers

Rule Type
☒ Compliance ☐ Approval Process

Site

Currently selected: Democo (Group)

Search by Site...

☒ Democo (Group)
☐ Factory 1
☐ Factory 2
☐ Factory 3
☐ Factory 4
☐ Packaging
☐ Clothing

**Step 9:** Now select the tools that you want to make up your rule.

**You can only use the compliance types which are tools on Foods Connected that you have subscribed too. So if you haven't subscribed to Supplier Document Manager you can't use Document Shares as part of the compliance rules, so on and so forth.**

Details
Select Tools
Select Suppliers

Company Profile
Supplier must confirm that the details in their company profile are correct and up-to-date.
☐ Every 12 Months

☐ Include supplied via an agent

Accreditations
☐

Document Shares
All documents that require sign off must be signed off.
☐

Document Requests
All requested mandatory documents must be uploaded and not past their expiry date.
☐

Questionnaires
All shared supplier questionnaires must be responded to.
☐

Supplier Audits
Audit items in shared supplier audits must be responded to.
☐

Supplier Checks
All shared supplier checks must be responded to.
☐

Specifications
All company specifications that require sign off must be signed off.
☐

External Specifications
☒ Not included in specification compliance
☐ All external specifications that require sign off must be signed off
☐ All external specifications that require completion must be completed

Traceability Checks
All shared traceability checks must be responded to.
☐

Risk Assessments
All Risk Assessments must be responded to.
☐

Customer Approved Lists
Outstanding Customer Approved Lists must be reviewed.
☐

Cancel Save

**Step 10:** As you select your rules you can see tabs appear for them above. When done select **Save**

**Note:** On Company Profile, By not selecting Include supplied via agent this means that the system will not set this as a rule for suppliers supplied via agents. Because these suppliers may not have anyone to update their profile as you are dealing directly with the agent.

Details	Select Tools	Select Suppliers	Document Requests	Questionnaires	Audit Types	Supplier Checks	Traceability Checks	Risk Assessments	Document Shares	Accreditations
<b>Company Profile</b> Supplier must confirm that the details in their company profile are correct and up-to-date. <input checked="" type="checkbox"/> Every 12 Months										
<input type="checkbox"/> Include supplied via an agent										
<b>Accreditations</b> <input checked="" type="checkbox"/>										
<b>Document Shares</b> All documents that require sign off must be signed off. <input checked="" type="checkbox"/>										
<b>Document Requests</b> All requested mandatory documents must be uploaded and not past their expiry date. <input checked="" type="checkbox"/>										
<b>Questionnaires</b> All shared supplier questionnaires must be responded to. <input checked="" type="checkbox"/>										
<b>Supplier Audits</b> Audit items in shared supplier audits must be responded to. <input checked="" type="checkbox"/>										
<b>Supplier Checks</b> All shared supplier checks must be responded to. <input checked="" type="checkbox"/>										
<b>Specifications</b> All company specifications that require sign off must be signed off. <input type="checkbox"/>										
<b>External Specifications</b> <input type="radio"/> Not included in specification compliancy <input checked="" type="radio"/> All external specifications that require sign off must be signed off <input type="radio"/> All external specifications that require completion must be completed										
<b>Traceability Checks</b> All shared traceability checks must be responded to. <input checked="" type="checkbox"/>										
<b>Risk Assessments</b> All Risk Assessments must be responded to. <input checked="" type="checkbox"/>										
<b>Customer Approved Lists</b> Outstanding Customer Approved Lists must be reviewed. <input checked="" type="checkbox"/>										
										<input type="button" value="Cancel"/> <input type="button" value="Save"/>

**(Step 11:** If you need a rule to be really specific to a few suppliers you can select the Suppliers tab and set those suppliers (But we do not recommend this unless you really need to as this, as this means the rules need to be managed manually. Speak to customer support on this)

**Step 12:** Now you select the tools that form part of your rules in order to set them up & pre-set.

**In this guide we will look at all the tools that can be set as compliance rule.**

### 1.2.2.1 Document Requests – How to setup & select

This is where you setup & select the documents you will need from your suppliers based on this rule. Documents like BRC certs, Allergen control procedures etc.

#### Step 1:

- **Compliance type:** Is this rule for all documents selected or only 1 selected.
- **Send Document Requests:** When yes is selected any new suppliers you add to the system the documents that you have loaded here will be automatically requested from the suppliers
- **Category:** What category of document to load
- **Document Type:** What is the document type from the category above
- **Comments:** Add any helpful comments
- **Mandatory:** Select yes or no
- **Must have an expiry date:** Select yes or no
- **Must have a document grade:** Select yes or no
- **Certification number required:** Select yes or no
- **Request from:** Choose what is appropriate for your rule  
*Supplier:* Will request documents directly from the supplier  
*Via suppliers:* Will request documents from agents only  
*Via suppliers if exists:* Will request documents from agents if they exist (Recommended)

Details	Select Tools	Select Suppliers	Document Requests	Questionnaires	Audit Types	Supplier Checks	Traceability Checks	Risk Assessments	Document Shares	Accreditations
<b>Compliance Type</b> <input checked="" type="radio"/> All Documents <input type="radio"/> Any One Selected Document										
<b>Send Document Requests</b> Yes										
<b>Group or Site Document</b> Yes										
<b>Category</b> Accreditations & Memberships										
<b>Document Type</b> --- BRC										
<b>Comments</b> Helpful comments										
<b>Mandatory</b> Yes										
<b>Must have Expiry Date?</b> Yes										
<b>Must Have Document Grade?</b> Yes										
<b>Certification Number Required?</b> Yes										
<b>Request From</b> Via Suppliers If Exists										
<input type="button" value="+ Add Document"/>										
Document	Comments	Mandatory	Request From	Must Have Expiry Date	Must Have Document Grade	Certification Number Required				
No required documents added...										
										<input type="button" value="Cancel"/> <input type="button" value="Save"/>

## Step 2: Now select **Add Document**

+ Add Document

Document	Comments	Mandatory	Request From	Must Have Expiry Date	Must Have Document Grade	Certification Number Required	
No required documents added...							

Cancel
Save

**Step 3:** Your document is now pre-loaded. And looks like this below. Follow steps above to add further documents to this rule. Select **Save** when done

+ Add Document

Document	Comments	Mandatory	Request From	Must Have Expiry Date	Must Have Document Grade	Certification Number Required	
--- BRC	Helpful comments	Yes	Via Suppliers If Exist	Yes	Yes	Yes	Remove

Cancel
Save

**Step 4:** At any stage you need to remove this document select **Remove**.

+ Add Document

Document	Comments	Mandatory	Request From	Must Have Expiry Date	Must Have Document Grade	Certification Number Required	
--- BRC	Helpful comments	Yes	Via Suppliers If Exist	Yes	Yes	Yes	Remove

Cancel
Save

### 1.2.2.2 Questionnaires – How to setup & select

This is where you setup & select the questionnaires you want your suppliers to complete based on this rule.

#### Step 1:

**All Questionnaires:** All questionnaires in the questionnaire manager form part of the rule. Select **Save** when done

Details
Select Tools
Select Suppliers
Document Requests
Questionnaires
Audit Types
Supplier Checks
Traceability Checks
Risk Assessments
Additional Rules
Document Shares
Accreditations

Questionnaires

☒ All Questionnaires
 ☐ Selected Questionnaires
 ☐ Selected Questionnaire Types



**Selected Questionnaires:** Select the questionnaires that will form part of the rule. Select **Save** when done

Details Select Tools Select Suppliers Document Requests **Questionnaires** Audit Types Supplier Checks Traceability Checks Risk Assessments Additional Rules Document Shares Accreditations

Questionnaires ☐ All Questionnaires ☒ Selected Questionnaires ☐ Selected Questionnaire Types [Auto Share Settings](#)

Q Search By Questionnaire Name...

<input checked="" type="checkbox"/>	Services Questionnaire (Ex/Col)
<input checked="" type="checkbox"/>	Cold Store Questionnaire
<input checked="" type="checkbox"/>	New Supplier Questionnaire (DR, S, Tri, Pag)
<input type="checkbox"/>	Agent/Broker Details questionnaire (DR, S, Tri, Freq)
<input type="checkbox"/>	Supplier Performance Evaluation
<input type="checkbox"/>	Supplier Volumes
<input type="checkbox"/>	Supplier Sustainability Questionnaire

**Auto Share:** Selecting auto share allows you to set the sharing of these questionnaires automatically.

- **Auto Share:** Turn on or Off
  - **Response By:** Supplier needs to respond by what you set here
  - **Secondary Title:** Add secondary title if needed
  - **Message:** Include a message if needed
  - **Request from:** Choose what is appropriate for your rule
- Supplier:** Will request documents directly from the supplier  
**Via suppliers:** Will request documents from agents only  
**Via suppliers if exists:** Will request documents from agents if they exist (Recommended)

#### Auto Share Questionnaire Settings

Auto Share

Response By

Secondary Title

Message To Include With Email

Request From

[Close](#)

**Selected Questionnaire Types:** Select the questionnaire types that will form part of the rule. Select **Save** when done

Details Select Tools Select Suppliers Document Requests **Questionnaires** Audit Types Supplier Checks Traceability Checks Risk Assessments Additional Rules Document Shares Accreditations

Questionnaires ☐ All Questionnaires ☐ Selected Questionnaires ☒ Selected Questionnaire Types [Auto Share Settings](#)

Q Search By Questionnaire Type Name...

<input checked="" type="checkbox"/>	Technical
<input checked="" type="checkbox"/>	Commercial
<input type="checkbox"/>	Financial
<input type="checkbox"/>	SAQ

**Auto Share:** Selecting auto share allows you to set the sharing of these documents automatically.

- **Auto Share:** Turn on or Off
- **Response By:** Supplier needs to respond by what you set here
- **Secondary Title:** Add secondary title if needed
- **Message:** Include a message if needed
- **Request from:** Choose what is appropriate for your rule  
**Supplier:** Will request documents directly from the supplier  
**Via suppliers:** Will request documents from agents only  
**Via suppliers if exists:** Will request documents from agents if they exist (Recommended)

Auto Share Questionnaire Settings

Auto Share	Yes
Response By	3 Weeks
Secondary Title	Secondary Title (Optional)...
Message To Include With Email	Message
Request From	Via Suppliers If Exists

Close

### 1.2.2.3 Audits – How to setup & select

This is where you setup & select the audits you need to complete on your suppliers based on this rule.

**Step 1:** Select the audit types that form part of your rule and set a frequency for them to be done. Select **Save** when done

Supplier List

Supplier Attributes

Supplier Approval

Compliance

Contacts List

Supply Chain Map

Maps

Activity Overview

Admin

Details

Select Tools

Select Suppliers

Document Requests

Questionnaires

Audit Types

Supplier Checks

Traceability Checks

Risk Assessments

Additional Rules

Document Shares

Accreditations

Abattoir & Boning Room Audit

Every 12 Months

Abattoir & Boning Room Audit

Every 12 Months

Auditor Unavailable - Annual Leave

Every 12 Months

Cold Storage

Every 12 Months

Dairy Supplier Audit

Every 12 Months

### 1.2.2.4 Supplier Checks – How to setup & select

This is where you setup & select the supplier checks you need to complete on your suppliers based on this rule.

**Step 1:** Select the supplier checks that form part of your rule and set a frequency for them to be done. Select **Save** when done

Supplier List

Supplier Attributes

Supplier Approval

Compliance

Contacts List

Supply Chain Map

Maps

Activity Overview

Admin

Details

Select Tools

Select Suppliers

Document Requests

Questionnaires

Audit Types

Supplier Checks

Traceability Checks

Risk Assessments

Additional Rules

Document Shares

Accreditations

Supplier Performance Tracker (DR, S)

Every

12

Months

Preliminary procurement assessment

Every

12

Months

Animal Welfare Checklist

Every

12

Months

Accident Investigation Report

Every

12

Months

### 1.2.2.5 Traceability Checks – How to setup & select

This is where you setup & select the traceability checks you need to complete on your suppliers based on this rule.

**Step 1:** Select the traceability checks that form part of your rule and set a frequency for them to be done. Select **Save** when done

<div>Supplier List</div> <div>Supplier Attributes</div> <div>Supplier Approval</div> <div>Compliance</div> <div>Contacts List</div> <div>Supply Chain Map</div> <div>Maps</div> <div>Activity Overview</div> <div>Admin</div>											
<div>Details</div> <div>Select Tools</div> <div>Select Suppliers</div> <div>Document Requests</div> <div>Questionnaires</div> <div>Audit Types</div> <div>Supplier Checks</div> <div>Traceability Checks</div> <div>Risk Assessments</div> <div>Additional Rules</div> <div>Document Shares</div> <div>Accreditations</div>											
<input checked="" type="checkbox"/>	Traceability Check (DR, NS)									Every	<div>12</div> Months
<input checked="" type="checkbox"/>	Fresh Produce Check									Every	<div>12</div> Months
<input checked="" type="checkbox"/>	Fresh Produce Traceability Check (DR, NS)									Every	<div>12</div> Months

### 1.2.2.6 Risk Assessments – How to setup & select

This is where you setup & select the risk assessments you need to complete on your suppliers, based on this rule.

**Step 1:** Select the risk assessments that form part of your rule

**Step 2:**

- **Single Site:** If you need to do one risk assessment per supplier per site
- **All Sites:** If you have one group risk assessment you can toggle to all sites so that this risk assessment can be done for one supplier for each of your sites.

Details	Select Tools	Select Suppliers	Document Requests	Questionnaires	Audit Types	Supplier Checks	Traceability Checks	Risk Assessments	Additional Rules	Document Shares	Accreditations
<input checked="" type="checkbox"/>								Inherent Risk Assessment (DR, S)		Single Site	
<input checked="" type="checkbox"/>								Packaging Risk Assessment	All Sites		
<input type="checkbox"/>								HACCP DECISION TREE		Single Site	

### 1.2.2.7 Document Shares – How to setup & select

This is where you setup & select the documents you want to share with your suppliers to sign off on, based on this rule.

**Step 1:**

**All Documents:** All documents in the Supplier document manager form part of the rule.  
Select **Save** when done

Details	Select Tools	Select Suppliers	Document Requests	Questionnaires	Audit Types	Supplier Checks	Traceability Checks	Risk Assessments	Additional Rules	Document Shares	Accreditations
Document Shares											
<input checked="" type="radio"/> All Documents <input type="radio"/> Selected Documents <input type="radio"/> Selected Document Categories											

**Selected Documents:** Select the documents that will form part of the rule. Select **Save** when done

Details	Select Tools	Select Suppliers	Document Requests	Questionnaires	Audit Types	Supplier Checks	Traceability Checks	Risk Assessments	Additional Rules	Document Shares	Accreditations
Document Shares											
<input type="radio"/> All Documents <input checked="" type="radio"/> Selected Documents <input type="radio"/> Selected Document Categories <span>Auto Share Settings</span>											
<div> <input type="text" value="Search By Document Name..."/> <span>Show Selected Documents Only: <input type="checkbox"/> No</span> </div>											
<input checked="" type="checkbox"/>								Glass Brittle Procedure			
<input checked="" type="checkbox"/>								Technical Conditions of Supply			
<input checked="" type="checkbox"/>								Technical Conditions of supply ingredients			
<input checked="" type="checkbox"/>								Organisational Structure			
<input type="checkbox"/>								Supplier Non-Conformance Procedure			

**Auto Share:** Selecting auto share, allows you to set the sharing of these documents automatically.

- **Auto Share Documents:** Turn on or Off
- **Requires Sign off:** Yes or no

- **Sign off Required By:** Supplier needs to sign off the document by what you set here
- **Sign off Frequency:** Set the Frequency
- **Declaration:** Use supplier or custom declaration (Refer to Supplier doc manager guide)
- **Receive Signed Off Notification Mail:** Yes or no
- **Notify Recipients by Email:** Yes or no
- **Message:** Add message
- **Request from:** Choose what is appropriate for your rule  
**Supplier:** Will request documents directly from the supplier  
**Via suppliers:** Will request documents from agents only  
**Via suppliers if exists:** Will request documents from agents if they exist (Recommended)

Auto Share Document Settings

Auto Share Documents	Yes
Requires Sign Off	Yes
Sign Off Required By	2 Weeks
Sign Off Frequency	Yearly
Declaration	Use Supplier Declaration
Receive Signed Off Notification Email	Yes
Notify Recipients By Email	Yes
Message To Include With Email	<input type="text" value="Enter a message..."/>
Request From	Via Suppliers If Exists

Close

**Selected Document Categories:** Select the document categories that will form part of the rule. Select **Save** when done

Details Select Tools Select Suppliers Document Requests Questionnaires Audit Types Supplier Checks Traceability Checks Risk Assessments Additional Rules **Document Shares** Accreditations

Document Shares ☐ All Documents ☐ Selected Documents ☒ Selected Document Categories Auto Share Settings

Show Selected Categories Only: ☐ No

<input checked="" type="checkbox"/>	Technical
<input checked="" type="checkbox"/>	Commercial
<input type="checkbox"/>	Technical conditions of supply
<input type="checkbox"/>	Sustainability
<input type="checkbox"/>	Maintenance

**Auto Share:** Selecting auto share, allows you to set the sharing of these documents automatically.

- **Auto Share Documents:** Turn on or Off
- **Requires Sign off:** Yes or no
- **Sign off Required By:** Supplier needs to sign off the document by what you set here
- **Sign off Frequency:** Set the Frequency
- **Declaration:** Use supplier or custom declaration (Refer to Supplier doc manager guide)
- **Receive Signed Off Notification Mail:** Yes or no

- **Notify Recipients by Email:** Yes or no
- **Message:** Add message
- **Request from:** Choose what is appropriate for your rule  
**Supplier:** Will request documents directly from the supplier  
**Via suppliers:** Will request documents from agents only  
**Via suppliers if exists:** Will request documents from agents if they exist (Recommended)

Auto Share Document Settings

Auto Share Documents	Yes
Requires Sign Off	Yes
Sign Off Required By	2 Weeks
Sign Off Frequency	Yearly
Declaration	Use Supplier Declaration
Receive Signed Off Notification Email	Yes
Notify Recipients By Email	Yes
Message To Include With Email	<input type="text" value="Enter a message..."/>
Request From	Via Suppliers If Exists

Close

### 1.2.2.8 Accreditations – How to setup & select

This is where you setup & select the accreditations you want to request from your suppliers to confirm they have, based on this rule.

#### Step 1:

**Accreditation Body:** Select the accreditation body from the dropdown

**Condition:** Select is the rule based on Grade or Expiry date is valid

**Mandatory:** Yes or no – This means they must enter and is a required field

**Comments:** Add any requesting comments

Details	Select Tools	Select Suppliers	Document Requests	Questionnaires	Audit Types	Supplier Checks	Traceability Checks	Risk Assessments	Additional Rules	Document Shares	Accreditations								
<div> <div>Accreditation Body</div> <div>BRC Global Standard</div> </div>																			
<div> <div>Condition</div> <div> <div>Field:</div> <div>Grade</div> </div> <div> <div>Values:</div> <div>A (e.g.)</div> </div> </div>																			
<div> <div>Mandatory</div> <div>Yes</div> </div>																			
<div> <div>Comments</div> <div>Please submit</div> </div>																			
<div>+ Add</div>																			
<table border="1"> <thead> <tr> <th>Accreditation</th> <th>Condition</th> <th>Comments</th> <th>Mandatory?</th> </tr> </thead> <tbody> <tr> <td colspan="4">No required accreditations added...</td> </tr> </tbody> </table>												Accreditation	Condition	Comments	Mandatory?	No required accreditations added...			
Accreditation	Condition	Comments	Mandatory?																
No required accreditations added...																			

## Step 2: When done select **Add**

Details Select Tools Select Suppliers Document Requests Questionnaires **Audit Types** Supplier Checks Traceability Checks Risk Assessments Additional Rules Document Shares **Accreditations**

Accreditation Body: BRC Global Standard

Condition: Field: Grade

Values: A (e.g.)

Mandatory: Yes

Comments: Please submit

**+ Add**

Accreditation	Condition	Comments	Mandatory?
No required accreditations added...			

**Step 3:** Your accreditation is now pre-loaded. And looks like this below. Follow steps above to add further accreditations to this rule. Select **Save** when done

**+ Add**

Accreditation	Condition	Comments	Mandatory?	
BRC	Filtered by Grade: A	Please submit	Yes	<b>Remove</b>

**Delete** **Cancel** **Save +**

**Step 4:** At any stage you need an accreditation, select **Remove**.

**+ Add**

Accreditation	Condition	Comments	Mandatory?	
BRC	Filtered by Grade: A	Please submit	Yes	<b>Remove</b>

**Delete** **Cancel** **Save +**

**Step 5:** At any stage you want to delete this part of your rule, select **Delete**

[+ Add](#)

Accreditation	Condition	Comments	Mandatory?	
BRC	Filtered by Grade: A	Please submit	Yes	<a href="#">Remove</a>

Delete
Cancel [Save](#)

### 1.2.2.9 Additional Rules – How to create & setup

This is where you create & setup simple custom additional rules, that you can ask yourself about the supplier when you add them, based on this rule.

**Step 1:** An **Additional Rules** tab will appear. This allows you to add customisable questions that you can create that you might ask your suppliers. Select **Additional Rules**

Details Select Tools Select Suppliers Document Requests Questionnaires Audit Types Supplier Checks Traceability Checks Risk Assessments **Additional Rules** Document Shares Accreditations

Additional Rule Description... [+](#)

**Step 2:** Add in your question or rule and select the **Green** icon. **Repeat steps to add more rules**

**Supplier Manager - Edit Rule** [← Back to Rules List](#)

Supplier List Supplier Attributes Supplier Approval Compliance Contacts List Supply Chain Map Supplier Listing Maps Activity Overview Admin

Details Select Tools Select Suppliers Document Requests Questionnaires Audit Types Supplier Checks Traceability Checks Risk Assessments **Additional Rules** Document Shares Accreditations

Add question here? [+](#)

**Step 3:** When you are done your added rules will look like this below. You can delete and add new ones using the steps above. Select **Save** when done

**Supplier Manager - Edit Rule** [← Back to Rules List](#)

Supplier List Supplier Attributes Supplier Approval Compliance Contacts List Supply Chain Map Supplier Listing Maps Activity Overview Admin

Details Select Tools Select Suppliers Document Requests Questionnaires Audit Types Supplier Checks Traceability Checks Risk Assessments **Additional Rules** Document Shares Accreditations

Additional Rule Description... [+](#)

Add question here? [+](#)



### 1.2.2.10 Completed Compliance Rules

**Step 1:** Once you have done adding all your **Supplier Approval Rules & Additional Rules** your table will look like below. You can edit these at any time. Click on the edit button beside each rule and follow steps above to change. You can also filter your rules by site as you may have different rules setup for some sites.

**Supplier Manager**

Supplier List | Supplier Attributes | Supplier Approval | Compliance | Contacts List | Supply Chain Map | Supplier Listing | Maps | Activity Overview | Admin

**Rules** | Compliance Rules | **Approval Rules**

Categories: Add Compliance Rule | Democo (Group) | Search...

Settings: Site | Name | Supplier Type | Suppliers

Alerts: Group | Supplier Approval | All Types | All Suppliers

- ✓ Company Profile
- ✓ Document Shares (All)
- ✓ Document Requests
- ✓ Questionnaires (All)
- ✓ Supplier Audits Types (All)

Preview button (eye icon) and Edit button (pencil icon) are highlighted with red boxes.

**Step 2:** If you select this preview button it shows all the suppliers that will fall into the rule. This is a good way of checking if you have setup your rules correctly.

**Supplier Manager**

Supplier List | Supplier Attributes | Supplier Approval | Compliance | Contacts List | Supply Chain Map | Supplier Listing | Maps | Activity Overview | Admin

**Rules** | Compliance Rules | **Approval Rules**

Categories: Add Compliance Rule | Democo (Group) | Search...

Settings: Site | Name | Supplier Type | Suppliers

Alerts: Group | Supplier Approval | All Types | All Suppliers

- ✓ Company Profile
- ✓ Document Shares (All)
- ✓ Document Requests
- ✓ Questionnaires (All)
- ✓ Supplier Audits Types (All)

Preview button (eye icon) is highlighted with a red box.

### Step 3: View Suppliers

This rule will apply to the following suppliers

- Foods Connected
- Northern Ireland Abattoir
- Spices & Co

Close | Export to Excel

### 1.2.3 SETTINGS

#### Step 1: Select Admin → Compliance Setup → Settings

On the settings tab in Compliance Setup is where you can access & setup further functions

- 1.2.3.1 **New Supplier Grace Period:** A Grace Period is a period which a new supplier will be exempt from compliancy rules to allow them time to respond to all requests. Turn on or off
- 1.2.3.2 **Compliance Updates Status:** When a supplier moves from compliant to non-compliant their status will automatically update to Requires Review and When a supplier moves from non-compliant to compliant their status will automatically update to Approved. Turn on or off
- 1.2.3.3 **Calculate Document Request Compliance For Vias:** If the VIA is responsible for the supplier document requests the system will calculate the overall compliance at a VIA level
- 1.2.3.4 **Enable Compliance Categories:** Set up compliance categories which will sit under your rules & can be assigned to. (Once activated a new tab on the left above settings will appear to setup Compliance Categories called **Categories**)

**This is something you can do at a later stage and can be setup & amended whenever you want. Or do before you setup your compliance rules.**

#### Step 1: Once activated the tab appears above Settings. Select **Categories**

**Supplier Manager**

Supplier List | Supplier Attributes | Supplier Approval | Compliance | Contacts List | Supply Chain Map | Supplier Listing | Maps | Activity Overview | **Admin**

Rules | **Categories** | Settings | Alerts

Manage your compliance settings.

<b>New Supplier Grace Period</b> - Set a grace period during which new suppliers will be exempt from compliancy rules on Foods Connected. (Set option to '0 days' if you do not wish to enable this feature)	30 days
<b>Compliance Updates Status</b> - When a supplier moves from compliant to non compliant their status will automatically update to Requires Review - When a supplier moves from non compliant to compliant their status will automatically update to Approved	<input checked="" type="checkbox"/>
<b>Calculate Document Request Compliance For Vias</b>	<input checked="" type="checkbox"/>
<b>Enable Compliance Categories</b> - Set up compliance categories which rules can be assigned to.	<input checked="" type="checkbox"/>
<b>Compliance Excluded Suppliers</b> - Choose suppliers that will be excluded from any compliance calculations.	<input type="checkbox"/>
<b>Associated Site list sort order</b> - Choose the sort order of the Associated Site list.	No Preference ▼

Save Settings

## Step 2: Now Select **Add Category**

**Supplier Manager**

Supplier List | Supplier Attributes | Supplier Approval | Compliance | Contacts List | Supply Chain Map | Supplier Listing | Maps | Activity Overview | Admin

Rules: Set up compliance categories which rules can be assigned to.

**Categories** | **Add Category**

Settings

Alerts

Category Name	Description	Rules in Category
There are currently no compliance categories set up...		

## Step 3: Add details for the Category. Select **Save** when done

**Compliance rule:** This is the compliance rule that this category will sit under & can select.

**Approval Rules:** If you select Supplier Approval this category will apply to the **Supplier Approval Rules** you created.

**Edit Compliance Category**

Category Name:

Description:

Compliance Rules

- ☐ Feed Suppliers
- ☐ Feed Suppliers
- ☐ Ingredient Suppliers
- ☐ Ingredient Suppliers
- ☒ Ingredient Suppliers Rule
- ☐ Ingredients
- ☐ Meat Processor

Approval Rules

- ☐ Supplier Approval

Cancel Save

## Step 4: Your categories will look like this below. Follow the steps above to add further **Categories** If you need to **edit** select the **edit** button and follow the steps above.

**Supplier Manager**

Supplier List | Supplier Attributes | Supplier Approval | Compliance | Contacts List | Supply Chain Map | Supplier Listing | Maps | Activity Overview | Admin


The compliance category has been successfully updated.

Rules: Set up compliance categories which rules can be assigned to.

**Categories** | Add Category

Settings

Alerts

Category Name	Description	Rules in Category	
Category 1	Category 1	Ingredient Suppliers Rule	

**Step 5:** If you now went back to your Compliance Rule (s) you can see the categories that you setup under that rule and make these rules more specific.

Supplier List | Supplier Attributes | Supplier Approval | Compliance | Contacts List | Supply Chain Map | Supplier Listing | Maps | Activity Overview | Admin

**Details** | Select Tools | Select Suppliers | Document Requests | Questionnaires | Audit Types | Supplier Checks | Traceability Checks | Risk Assessments | Additional Rules | Document Shares | Accreditations

Description: Ingredient Suppliers Rule

Rule Type: ☒ Compliance ☐ Approval Process

Site: Currently selected: Democo (Group)

Search by Site...

- ☒ Democo (Group)
- ☐ Factory 1
- ☐ Factory 2
- ☐ Factory 3
- ☐ Factory 4
- ☐ Packaging
- ☐ Clothing

Compliance Category: ☒ Category 1

Supplier Type: Currently selected: Ingredients, Meat

Search by Supplier Sub Type...

- ☐ Abattoirs
- ☐ Agent
- ☐ Agent / Broker
- ☐ Bakery
- ☐ Beverages
- ☐ Brand Owner
- ☐ Clothing Supplier

**This is something you can do at a later stage and can be setup & amended whenever you want. Or do before you setup your compliance rules.**

#### 1.2.3.5 Compliance Excluded Suppliers: Choose suppliers that will be excluded from any compliance calculations.

**Step 1:** Select the **Edit** button

Supplier Manager


Supplier List | Supplier Attributes | Supplier Approval | Compliance | Contacts List | Supply Chain Map | Supplier Listing | Maps | Activity Overview | Admin

Rules: Manage your compliancy settings.

Categories

Settings

Alerts

<b>New Supplier Grace Period</b> - Set a grace period during which new suppliers will be exempt from compliancy rules on Foods Connected. (Set option to '0 days' if you do not wish to enable this feature)	30 days
<b>Compliance Updates Status</b> - When a supplier moves from compliant to non compliant their status will automatically update to Requires Review - When a supplier moves from non compliant to compliant their status will automatically update to Approved	<input checked="" type="checkbox"/>
<b>Calculate Document Request Compliance For Vias</b>	<input checked="" type="checkbox"/>
<b>Enable Compliance Categories</b> - Set up compliance categories which rules can be assigned to.	<input checked="" type="checkbox"/>
<b>Compliance Excluded Suppliers</b> - Choose suppliers that will be excluded from any compliance calculations.	
<b>Associated Site list sort order</b> - Choose the sort order of the Associated Site list.	No Preference

Save Settings

**Step 2:** Select the suppliers you want to be excluded from all compliance rules. Select **Save** when done

Compliance Excluded Suppliers

Search By Supplier Name...

Show Selected Suppliers Only: No

<input checked="" type="checkbox"/>	Abattoir 1
<input checked="" type="checkbox"/>	ABC Laboratories
<input checked="" type="checkbox"/>	ABC Snacks Ltd
<input checked="" type="checkbox"/>	Acme Food Co
<input type="checkbox"/>	Acorn Produce
<input type="checkbox"/>	Agent
<input type="checkbox"/>	Agent - Farmer 2
<input type="checkbox"/>	Agent - Naparoo
<input type="checkbox"/>	Alison Hayes (UK) Ltd
<input type="checkbox"/>	Aster Textile London Ltd
<input type="checkbox"/>	AusAbattoir
<input type="checkbox"/>	Ava Cheese Supplier
<input type="checkbox"/>	Cake Co
<input type="checkbox"/>	Chicken Farmer 1
<input type="checkbox"/>	Chinook
<input type="checkbox"/>	Cleaning services

Cancel Save

**Step 3:** Your list now saves. At any stage you want to amend this exclusion list, follow the steps above.

1.2.3.6 **Associated Site List sort order:** Choose the sort order of the Associated Site list.

Associated Site list sort order  
- Choose the sort order of the Associated Site list.

No Preference  
No Preference  
Ascending  
Descending

## 1.2.4 ALERTS

Allows you to setup alerts for non-compliant suppliers to specific users that you can define.

**Step 1:** Select **Admin** → **Compliance Setup** → **Alerts**

Supplier Manager

Supplier List Supplier Attributes Supplier Approval Compliance Contacts List Supply Chain Map Supplier Listing Maps Activity Overview Admin

Rules Set up users to receive alerts about non-compliant suppliers.

Categories

Settings

Alerts

Add New Alert Delete Selected Alerts

User	Alert Type	Site	Supplier Type
<input type="checkbox"/> Steve Jones	Compliance Summary	Democo (Group)	All Suppliers
<input type="checkbox"/> Quality	Compliance Summary	Democo (Group)	All Suppliers

General Admin  
Compliance Setup  
Supplier Share Groups  
Supplier Approval Admin

## Step 2: To add a new alert, select **Add New Alert**

**Supplier Manager**

Supplier List | Supplier Attributes | Supplier Approval | Compliance | Contacts List | Supply Chain Map | Supplier Listing | Maps | Activity Overview | Admin

Rules: Set up users to receive alerts about non-compliant suppliers.

Categories: **Add New Alert** | Delete Selected Alerts

Settings: Alerts

User	Alert Type	Site	Supplier Type
<input type="checkbox"/> User			
<input type="checkbox"/> Steve Jones	Compliance Summary	Democo (Group)	All Suppliers
<input type="checkbox"/> Quality	Compliance Summary	Democo (Group)	All Suppliers

## Step 3: Add **Users** for the alert, what **Site** the alert is for & the **Supplier Type**. Select **Save** when done

**Add Alert** [X]

User:

☐ Roger McCracken

☐ Tina Mead

☒ Sally Mitchell

☐ Scott Nevision

Type: ☒ Compliance Summary

Site:

Supplier Type:

Cancel **Save**

## Step 4: Your alerts will look like this below. To add further alerts or more specific alerts follow the steps above.

Compliance alert has been successfully updated.

Rules: Set up users to receive alerts about non-compliant suppliers.

Categories: **Add New Alert** | Delete Selected Alerts

Settings: Alerts

User	Alert Type	Site	Supplier Type
<input type="checkbox"/> Steve Jones	Compliance Summary	Democo (Group)	All Suppliers
<input type="checkbox"/> Quality	Compliance Summary	Democo (Group)	All Suppliers
<input type="checkbox"/> Sally Mitchell	Compliance Summary	Democo (Group)	All Suppliers

## Step 5: To delete alerts, simply select the alerts, then select **Delete Selected Alerts**.

Compliance alert has been successfully updated.

Rules: Set up users to receive alerts about non-compliant suppliers.

Categories: **Add New Alert** | **Delete Selected Alerts**

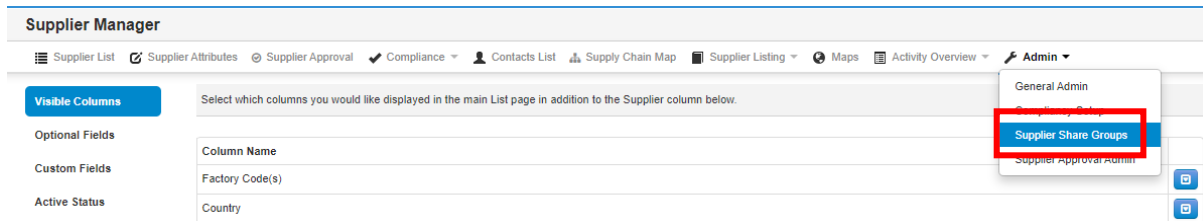
Settings: Alerts

User	Alert Type	Site	Supplier Type
<input type="checkbox"/> Steve Jones	Compliance Summary	Democo (Group)	All Suppliers
<input type="checkbox"/> Quality	Compliance Summary	Democo (Group)	All Suppliers
<input type="checkbox"/> Sally Mitchell	Compliance Summary	Democo (Group)	All Suppliers

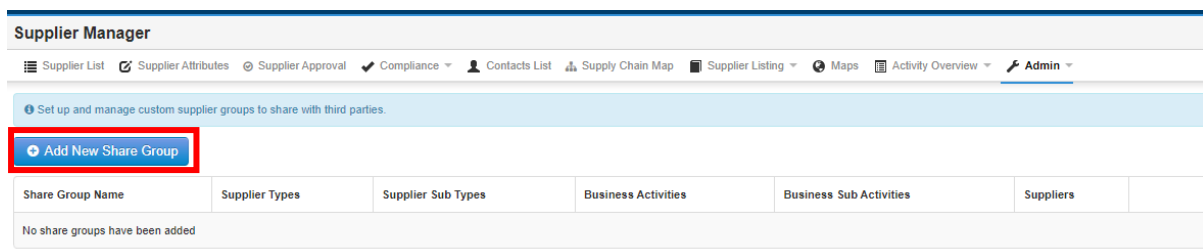
## 1.3 SUPPLIER SHARE GROUPS

Allows you to setup & manage custom share groups to share with third parties.

**Step 1: Select Admin → Compliance Setup → Supplier Share Groups**



**Step 2: To add a new share group, select Add New Share Group**



**Step 3:** Now select what you want to form part of this share group, **Supplier Type**, **Sub Type**, **Business Activity**, **Sub Activity** and even **Specific Suppliers**. When done select **Add Share Group**

Supplier Manager

Add Supplier Share Group

Cancel

Add Share Group

Share Group Name

Share Group 1

Supplier Type

☐ reveal
 ☒ Ingredients
 ☐ Bakery
 ☐ Dairy
 ☐ Packaging
 ☐ Agent
 ☐ Direct Vendor
 ☐ Feed Ingredients
 ☐ Slaughter
 ☐ Service Kill
 ☐ Snacks

Supplier Sub Type

☒ Spices
 ☐ Glazes
 ☐ Nuts
 ☐ Conventional - Pork
 ☐ Livestock

Business Activity

☒ Food
 ☐ Fabric Mill
 ☐ Manufacturer Clothing
 ☐ Processor
 ☐ Manufacturer
 ☐ Distributor
 ☐ Retailer
 ☐ Cattle
 ☐ Grover
 ☐ In Country PMO (Produce Marketing Organisation)

Business Sub Activity

None available

Specific Suppliers

☐ Abattoir 1
 ☐ ABC Laboratories
 ☐ ABC Snacks Ltd
 ☐ Acme Food Co
 ☐ Acorn Produce
 ☐ Agent
 ☐ Agent - Farmer 2
 ☐ Agent - Naparoo
 ☐ Alison Hayes (UK) Ltd
 ☐ Aster Textile London Ltd

Cancel

Add Share Group



**Step 4:** Your supplier Share Groups will look like this below. To add further Share Groups select **Add New Share Group** & follow the steps above.



**Supplier Manager**

Supplier List Supplier Attributes Supplier Approval Compliance Contacts List Supply Chain Map Supplier Listing Maps Activity Overview **Admin**

Share Group added successfully

Set up and manage custom supplier groups to share with third parties.

**Add New Share Group**

Share Group Name	Supplier Types	Supplier Sub Types	Business Activities	Business Sub Activities	Suppliers	
Share Group 1	Ingredients	Spices	Food	All	All	 

**Step 5:** To Edit select the **edit** button and follow the steps above. And to delete, select the red **Delete** button



**Supplier Manager**

Supplier List Supplier Attributes Supplier Approval Compliance Contacts List Supply Chain Map Supplier Listing Maps Activity Overview **Admin**

Share Group added successfully

Set up and manage custom supplier groups to share with third parties.

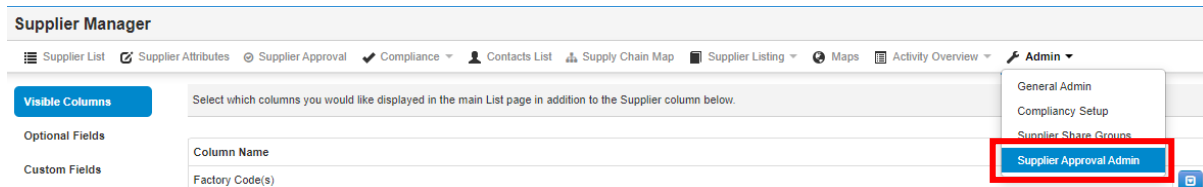
**Add New Share Group**

Share Group Name	Supplier Types	Supplier Sub Types	Business Activities	Business Sub Activities	Suppliers	
Share Group 1	Ingredients	Spices	Food	All	All	 

## 1.4 SUPPLIER APPORVAL ADMIN - SETUP OF THE APPROVAL FUNCTION

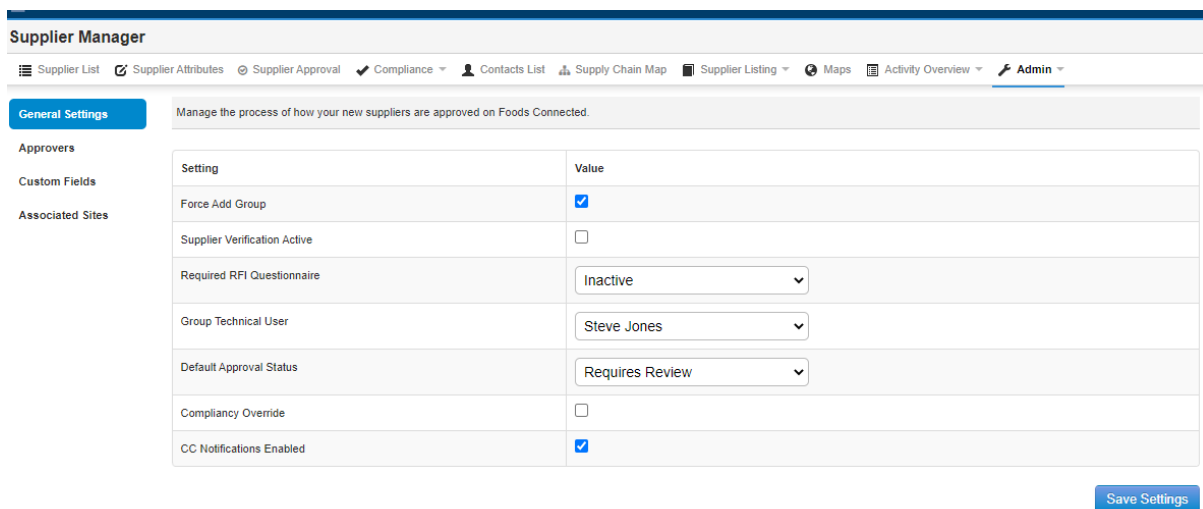
Allows you to setup & manage the admin of the Supplier Approval Function.

**Step 1: Select Admin → Compliance Setup → Supplier Approval Admin**



The screenshot shows the 'Supplier Manager' interface. At the top, there is a navigation bar with various icons and labels: Supplier List, Supplier Attributes, Supplier Approval, Compliance, Contacts List, Supply Chain Map, Supplier Listing, Maps, Activity Overview, and Admin. The 'Admin' dropdown menu is open, showing three options: General Admin, Compliance Setup, and Supplier Approval Admin. The 'Supplier Approval Admin' option is highlighted with a red rectangle.

**Step 2:**



The screenshot shows the 'Supplier Manager' interface with the 'General Settings' tab selected. The page title is 'Manage the process of how your new suppliers are approved on Foods Connected.' The settings are organized into a table with two columns: 'Setting' and 'Value'.

Setting	Value
Force Add Group	<input checked="" type="checkbox"/>
Supplier Verification Active	<input type="checkbox"/>
Required RFI Questionnaire	Inactive
Group Technical User	Steve Jones
Default Approval Status	Requires Review
Compliance Override	<input type="checkbox"/>
CC Notifications Enabled	<input checked="" type="checkbox"/>

At the bottom right of the settings table, there is a 'Save Settings' button.

### 1.4.1 GENERAL SETTINGS – CREATE & SETUP

#### Step 1:

- **Force Add Group:** This means that when you add a supplier the system forces you to add the Group HQ site as well. On or off
- **Supplier Verification Active:** On or off – Once activated, when you add a new supplier they will need verified first by a nominated person in the supplier approval tab. **Note:** When you turn on supplier verification a new tab opens on the left called **Verifiers** – See 1.4.5 below
- **Required RFI Questionnaire:** An RFI is a Request for Information or SAQ questionnaire. Active or Inactive – Once activated, new tab opens on the left called **RFI Questionnaires** – See 1.4.6 below
- **Group Technical User:** Select user
- **Default Approval Status:** Set Status
- **Compliance Override:** You can override supplier compliance rules. On or off
- **CC Notifications Enabled:** On or off

**Supplier Manager**

Supplier List | Supplier Attributes | Supplier Approval | Compliance | Contacts List | Supply Chain Map | Supplier Listing | Maps | Activity Overview | Admin

**General Settings** Manage the process of how your new suppliers are approved on Foods Connected.

Setting	Value
Force Add Group	<input checked="" type="checkbox"/>
Supplier Verification Active	<input checked="" type="checkbox"/>
Required RFI Questionnaire	Active
Group Technical User	Steve Jones
Default Approval Status	Requires Review
Compliance Override	<input checked="" type="checkbox"/>
CC Notifications Enabled	<input checked="" type="checkbox"/>

[Save Settings](#)

**Step 2:** Select **Save Settings** when done

### 1.4.2 APPROVERS – CREATE & SETUP SUPPLIER APPROVERS

You can setup individual approvers for certain suppliers on Foods Connected allowing the correct people to approve them.

**Step 1:** Select **Admin** → **Supplier Approval Admin** → **Add Approvers**

**Supplier Manager**

Supplier List | Supplier Attributes | Supplier Approval | Compliance | Contacts List | Supply Chain Map | Supplier Listing | Maps | Activity Overview | Admin

**General Settings** [Add Approvers](#) [Delete Selected](#)

**Approvers**

Site	Supplier Type	Approvers
<input type="checkbox"/> Democo (Group)	Abattoirs	Steve Jones, Eric Knowles, Tom Stanton
<input type="checkbox"/> Democo (Group)	Bakery	Steve Jones
<input type="checkbox"/> Democo (Group)	Brand Owner	Ian Collins

**Admin** dropdown menu:

- General Admin
- Compliance Setup
- Supplier onboarding Groups
- Supplier Approval Admin**

## Step 2: Select Add Approvers

**Supplier Manager**

Supplier List | Supplier Attributes | **Supplier Approval** | Compliance | Contacts List | Supply Chain Map | Supplier Listing | Maps | Activity Overview | Admin

General Settings | **Add Approvers** | Delete Selected

Site	Supplier Type	Approvers
<input type="checkbox"/> Democo (Group)	Abattoirs	Steve Jones, Eric Knowles, Tom Stanton
<input type="checkbox"/> Democo (Group)	Bakery	Steve Jones
<input type="checkbox"/> Democo (Group)	Brand Owner	Ian Collins

General Admin  
Compliance Setup  
Supplier Share Groups  
**Supplier Approval Admin**

**Step 3:** Select the **Site** that this relates too, then the **Supplier Type** that your **User or Team** is the dedicated approver for, then choose the user and select **Save**

### Update Approvers

**Site**

**Supplier Type**

**Approvers**

- ☐ Sean Baird
- ☒ Ian Collins
- ☐ Site Manager Delacroix
- ☐ Steve Jones
- ☐ Eric Knowles

**Step 4:** Approvers will appear as per screenshot below. To add further approvers follow steps above.

**Supplier Manager**

Supplier List | Supplier Attributes | **Supplier Approval** | Compliance | Contacts List | Supply Chain Map | Supplier Listing | Maps | Activity Overview | Admin

General Settings | **Add Approvers** | Delete Selected

Site	Supplier Type	Approvers
<input type="checkbox"/> Democo (Group)	Abattoirs	Steve Jones, Eric Knowles, Tom Stanton
<input type="checkbox"/> Democo (Group)	Bakery	Steve Jones
<input type="checkbox"/> Democo (Group)	Brand Owner	Ian Collins

General Admin  
Compliance Setup  
Supplier Share Groups  
**Supplier Approval Admin**

**Step 5:** To edit an approver simply select the **edit** button beside and follow the steps above.

**Supplier Manager**

Supplier List | Supplier Attributes | Supplier Approval | Compliance | Contacts List | Supply Chain Map | Supplier Listing | Maps | Activity Overview | Admin

General Settings | Add Approvers | Delete Selected

Site	Supplier Type	Approvers
<input type="checkbox"/> Democo (Group)	Abattoirs	Steve Jones, Eric Knowles, Tom Stanton
<input type="checkbox"/> Democo (Group)	Bakery	Steve Jones
<input type="checkbox"/> Democo (Group)	Brand Owner	Ian Collins

Verifiers

RFI Questionnaires

Custom Fields

Associated Sites

Admin

- General Admin
- Compliance Setup
- Supplier Share Groups
- Supplier Approval Admin

### 1.4.3 CUSTOM FIELDS - SETUP & CREATE APPROVAL PROCESS CUSTOM FIELDS

Approval process custom fields are a list of customised questions you create then pose when putting a supplier through the supplier approval process. These are fields you complete for each supplier when you add them. You can then see the answers to these in the Supplier Approval Tab. See example below.

**Step 1:** Select **Supplier Approval Admin** then **Custom Fields**

**Supplier Manager**

Supplier List | Supplier Attributes | Supplier Approval | Compliance | Contacts List | Supply Chain Map | Supplier Listing | Maps | Activity Overview | Admin

General Settings | Approval Process Custom Fields

Custom Field Label	Custom One - Textbox	Custom Two - Textbox	Custom Three - Textbox
Customer/Brand			
Materials to be Supplied			
Supplier Contact Name & Number			

Verifiers

RFI Questionnaires

Custom Fields

Associated Sites

Admin

- General Admin
- Compliance Setup
- Supplier Share Groups
- Supplier Approval Admin

### How they look when adding new suppliers

**Supplier Approval Process - Additional Details**

Customer/Brand

Materials to be Supplied

Supplier Contact Name & Number




Approval Required By/Launch Date

Is this Supplier GFSI approved?

### How they look when info has been added and in the Supplier Approval Tab




	Additional Information
Customer/Brand	Retailer
Materials to be Supplied	Food
Supplier Contact Name & Number	Brogan Manus
Is this Supplier GFSI approved?	BRC

**Step 2:** Select which field type you want to use as you have a choice of **Textbox**, **Dates**, **Dropdowns**

Approval Process Custom Fields	Custom Field Label	Active	Required	
Custom One - Textbox	Customer/Brand	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Custom Two - Textbox	Materials to be Supplied	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Custom Three - Textbox	Supplier Contact Name & Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Custom Four - Textbox	Approval Custom Four	<input type="checkbox"/>	<input type="checkbox"/>	
Custom Five - Textbox	Approval Custom Five	<input type="checkbox"/>	<input type="checkbox"/>	
Custom Six - Date	Approval Required By/Launch Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Custom Seven - Date	Approval Custom Seven	<input type="checkbox"/>	<input type="checkbox"/>	
Custom Eight - Dropdown	Is this Supplier GFSI approved?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Custom Nine - Dropdown	Approval Custom Nine	<input type="checkbox"/>	<input type="checkbox"/>	
Custom Ten - Dropdown	Approval Custom Ten	<input type="checkbox"/>	<input type="checkbox"/>	

Save Settings

**Step 3:** If you choose a **Dropdown** add the Options required by selecting the blue edit icon beside the field you want to use

Approval Process Custom Fields	Custom Field Label	Active	Required	
Custom One - Textbox	Customer/Brand	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Custom Two - Textbox	Materials to be Supplied	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Custom Three - Textbox	Supplier Contact Name & Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Custom Four - Textbox	Approval Custom Four	<input type="checkbox"/>	<input type="checkbox"/>	
Custom Five - Textbox	Approval Custom Five	<input type="checkbox"/>	<input type="checkbox"/>	
Custom Six - Date	Approval Required By/Launch Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Custom Seven - Date	Approval Custom Seven	<input type="checkbox"/>	<input type="checkbox"/>	
Custom Eight - Dropdown	Is this Supplier GFSI approved?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Custom Nine - Dropdown	Approval Custom Nine	<input type="checkbox"/>	<input type="checkbox"/>	
Custom Ten - Dropdown	Approval Custom Ten	<input type="checkbox"/>	<input type="checkbox"/>	

Save Settings

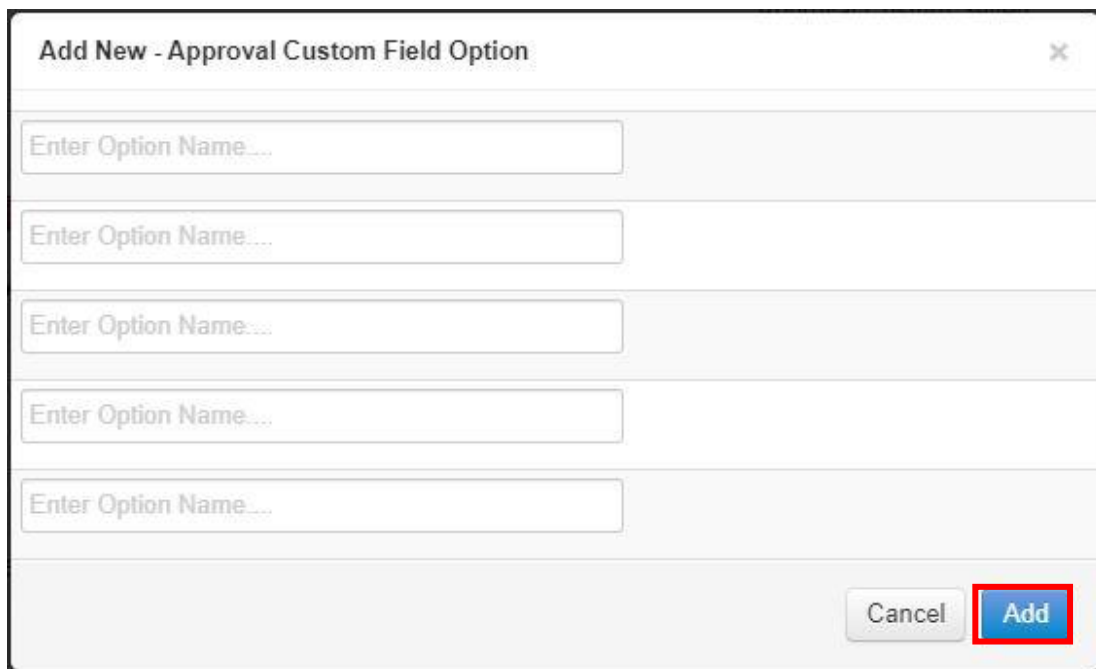
**Step 4: Select **Add New** to add options**



The screenshot shows a table with a list of options. At the top left, there are two buttons: 'Add New' (highlighted with a red box) and 'Delete Selected'. The table contains the following rows:

<input type="checkbox"/>	Option Name	<input type="checkbox"/>
<input type="checkbox"/>	Custom Category Option	
<input type="checkbox"/>	BRC	<input type="checkbox"/>
<input type="checkbox"/>	IFS	<input type="checkbox"/>
<input type="checkbox"/>	FSSC 22000	<input type="checkbox"/>
<input type="checkbox"/>	Global Red Meat Standard	<input type="checkbox"/>
<input type="checkbox"/>	Canada Gap	<input type="checkbox"/>
<input type="checkbox"/>	Global Gap	<input type="checkbox"/>
<input type="checkbox"/>	NO GFSI Certification	<input type="checkbox"/>

**Step 5: Add your options and select **Add** to update the list**



The screenshot shows a dialog box titled 'Add New - Approval Custom Field Option'. It contains five text input fields, each with the placeholder text 'Enter Option Name...'. At the bottom right, there are two buttons: 'Cancel' and 'Add' (highlighted with a red box).

**Step 6: To edit these simply select the edit button and follow **Step 4** again**



The screenshot shows the same table as in Step 4. The 'BRC' row is highlighted, and the edit button (pencil icon) in the rightmost column is highlighted with a red box.

<input type="checkbox"/>	Option Name	<input type="checkbox"/>
<input type="checkbox"/>	Custom Category Option	
<input type="checkbox"/>	BRC	<input type="checkbox"/>
<input type="checkbox"/>	IFS	<input type="checkbox"/>
<input type="checkbox"/>	FSSC 22000	<input type="checkbox"/>
<input type="checkbox"/>	Global Red Meat Standard	<input type="checkbox"/>
<input type="checkbox"/>	Canada Gap	<input type="checkbox"/>
<input type="checkbox"/>	Global Gap	<input type="checkbox"/>
<input type="checkbox"/>	NO GFSI Certification	<input type="checkbox"/>

**Step 7:** Select **Active** beside the fields you want to turn on and select **Required** if this question must be answered by you.

Approval Process Custom Fields	Custom Field Label	Active	Required	
Custom One - Textbox	Customer/Brand	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Custom Two - Textbox	Materials to be Supplied	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Custom Three - Textbox	Supplier Contact Name & Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Custom Four - Textbox	Approval Custom Four	<input type="checkbox"/>	<input type="checkbox"/>	
Custom Five - Textbox	Approval Custom Five	<input type="checkbox"/>	<input type="checkbox"/>	
Custom Six - Date	Approval Required By/Launch Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Custom Seven - Date	Approval Custom Seven	<input type="checkbox"/>	<input type="checkbox"/>	
Custom Eight - Dropdown	Is this Supplier GFSI approved?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Custom Nine - Dropdown	Approval Custom Nine	<input type="checkbox"/>	<input type="checkbox"/>	
Custom Ten - Dropdown	Approval Custom Ten	<input type="checkbox"/>	<input type="checkbox"/>	

Save Settings

**Step 8:** Once done select **Save Settings**

Approval Process Custom Fields	Custom Field Label	Active	Required	
Custom One - Textbox	Customer/Brand	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Custom Two - Textbox	Materials to be Supplied	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Custom Three - Textbox	Supplier Contact Name & Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Custom Four - Textbox	Approval Custom Four	<input type="checkbox"/>	<input type="checkbox"/>	
Custom Five - Textbox	Approval Custom Five	<input type="checkbox"/>	<input type="checkbox"/>	
Custom Six - Date	Approval Required By/Launch Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Custom Seven - Date	Approval Custom Seven	<input type="checkbox"/>	<input type="checkbox"/>	
Custom Eight - Dropdown	Is this Supplier GFSI approved?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Custom Nine - Dropdown	Approval Custom Nine	<input type="checkbox"/>	<input type="checkbox"/>	
Custom Ten - Dropdown	Approval Custom Ten	<input type="checkbox"/>	<input type="checkbox"/>	

Save Settings



### 1.4.4 ASSOCIATED SITES – HOW TO CREATE & SETUP

This is where you setup who approves adding associated sites to suppliers. This must be signed off by a company site approver which can be set here.

#### Step 1: Select **Supplier Approval Admin** then **Associated Sites**

**Supplier Manager**

Supplier List | Supplier Attributes | Supplier Approval | Compliance | Contacts List | Supply Chain Map | Supplier Listing | Maps | Activity Overview | Admin

**General Settings** Manage the process of how new associated sites are added on Foods Connected.

**Approvers**

**Verifiers** Supplier Site Approval - Adding associated sites to suppliers must be signed off by a company site approver which can be set below...

**RFI Questionnaires**

**Custom Fields** Add Site Approvers Delete Selected

**Associated Sites**

Site	Category	Selected Users
<input type="checkbox"/> All Sites	All Categories	Steve Jones, Sally Mitchell
<input type="checkbox"/> Factory 3	Poultry Farm	Eric Knowles
<input type="checkbox"/> Supply Chain Mapping - W	All Categories	Demo User 1

Default Status: In Progress

Active: ☒

Save Settings

**Step 2:** Turn on Supplier Site Approval by setting as **Active** & choose the **Default Status** of the supplier when you add a new associated site. Select **Save Settings** when done.

Manage the process of how new associated sites are added on Foods Connected.

	Default Status	Active
Supplier Site Approval - Adding associated sites to suppliers must be signed off by a company site approver which can be set below...	In Progress	<input checked="" type="checkbox"/>

#### Step 3: Now add the site approvers by selecting **Add Site Approvers**

Add Site Approvers Delete Selected

Site	Category	Selected Users
<input type="checkbox"/> All Sites	All Categories	Steve Jones, Sally Mitchell
<input type="checkbox"/> Factory 3	Poultry Farm	Eric Knowles
<input type="checkbox"/> Supply Chain Mapping - W	All Categories	Demo User 1

Save Settings

**Step 4:** Now select the **Site** the approver is from, the **Supplier Types** or All the approver can approve & then Select the **Approver**. Once done select **Save**

Update Approvers

Site:

Supplier Type(s):

Approvers

-- Group Users --

☒ Kyle Anderson

☐ Melissa Anderson

☐ Paul Armstrong

☐ Sam Baird

**Step 5:** Once done your approvers will look like this below. Select **Save settings**. To edit simply select the edit button and follow steps above

	Site	Category	Selected Users	
<input type="checkbox"/>	All Sites	All Categories	Steve Jones, Sally Mitchell	<input type="button" value="Edit"/>
<input type="checkbox"/>	Factory 3	Poultry Farm	Eric Knowles	<input type="button" value="Edit"/>
<input type="checkbox"/>	Supply Chain Mapping - W	All Categories	Demo User 1	<input type="button" value="Edit"/>

**Step 6:** To edit simply select the **Edit** button and follow steps above

	Site	Category	Selected Users	
<input type="checkbox"/>	All Sites	All Categories	Steve Jones, Sally Mitchell	<input type="button" value="Edit"/>
<input type="checkbox"/>	Factory 3	Poultry Farm	Eric Knowles	<input type="button" value="Edit"/>
<input type="checkbox"/>	Supply Chain Mapping - W	All Categories	Demo User 1	<input type="button" value="Edit"/>

**Step 7:** To delete any approvers simply select the red **Delete** button.

	Site	Category	Selected Users	
<input type="checkbox"/>	All Sites	All Categories	Steve Jones, Sally Mitchell	<input type="button" value="Edit"/>
<input type="checkbox"/>	Factory 3	Poultry Farm	Eric Knowles	<input type="button" value="Edit"/>
<input type="checkbox"/>	Supply Chain Mapping - W	All Categories	Demo User 1	<input type="button" value="Edit"/>

## 2. ADDING A NEW SUPPLIER

After setup is complete the next step is to add your Suppliers to your Supplier List.

There are two options for adding suppliers,

1. **Add Individual suppliers one at a time (most beneficial for updating a Supplier List).**
2. **Adding bulk supplier (most beneficial when you have a new supplier list with numerous suppliers being added)**

### 2.1 ADD INDIVIDUAL SUPPLIERS

**Step 1: Go to the Supplier Manager under the Supplier Approval Tab select Supplier List**

**Supplier Manager**

**Supplier List** | Supplier Attributes | Supplier Approval | Compliance | Contacts List | Supply Chain Map | Supplier Listing | Maps | Activity Overview | Admin

Site: Democo (Group) | Supplier Type: All | Status: All | Country: All | Search: Search... | Include Via's in Search: ☒ | Filter | Clear Filters

Supplier Sub Type: All | Supplied Via: All | Lead Technical: All | Compliant Level: All

Business Activity: All | Business Sub Activity: All | Under Exception: All

[Add New](#) | [Detail Reports](#) | [Export to Excel](#) | [Summary Report](#) | [Bulk Update](#) | [Map View](#) | [Via Chain View](#) | [Attributes](#) | Viewing 109 results. Page 1 of 3

	Factory Code(s)	Company Name	Country	Supplier Type	Supplier Sub Type	Lead Technical	Under Exception	Supplied Via	Linked Customer	Status	Compliant	
<input type="checkbox"/>	US 323232	Abattoir 1	United States	Meat Processor	Beef, Lamb, Pork	Steve Jones				Approved	Compliant	<a href="#">View</a>
<input type="checkbox"/>	1234	ABC Laboratories	New Zealand	Laboratory						Delisted	N/A	<a href="#">View</a>

**Step 2: Select Add New then Add New**

**Supplier Manager**

**Supplier List** | Supplier Attributes | Supplier Approval | Compliance | Contacts List | Supply Chain Map | Supplier Listing | Maps | Activity Overview | Admin

Site: Democo (Group) | Supplier Type: All | Status: All | Country: All | Search: Search... | Include Via's in Search: ☒ | Filter | Clear Filters

Supplier Sub Type: All | Supplied Via: All | Lead Technical: All | Compliant Level: All

Business Activity: All | Business Sub Activity: All | Under Exception: All

[Add New](#) | [Detail Reports](#) | [Export to Excel](#) | [Summary Report](#) | [Bulk Update](#) | [Map View](#) | [Via Chain View](#) | [Attributes](#) | Viewing 109 results. Page 1 of 3

**Add New**

Import New

	Factory Code(s)	Company Name	Country	Supplier Type	Supplier Sub Type	Lead Technical	Under Exception	Supplied Via	Linked Customer	Status	Compliant	
<input type="checkbox"/>	US 323232	Abattoir 1	United States	Meat Processor	Beef, Lamb, Pork	Steve Jones				Approved	Compliant	<a href="#">View</a>
<input type="checkbox"/>	1234	ABC Laboratories	New Zealand	Laboratory						Delisted	N/A	<a href="#">View</a>

**Step 3:** Type in your supplier's name & select **Search**.

**NOTE:** It is good practice to search for part name as well as different spelling in case it might already be in the database.

**Supplier Manager - Request a Supplier**

Supplier List | Supplier Attributes | Supplier Approval | Compliance | Contacts List | Supply Chain Map | Supplier Listing | Maps | Activity Overview | Admin

There are thousands of companies stored in the Foods Connected database, enter a key word in the box below to find your Supplier.

Key words that you can use to find your Supplier include: **Company Name, Factory Code, Address, Post Code and Accreditation Codes.**

You may also search for your Supplier by entering the relevant details for a company site of that company.

Suppliers Name

**Step 4:** If the supplier is currently on Foods Connected it will appear in the list to select, if the supplier is not in the database it will give you the option to request a new supplier. This request will go to the Foods Connected Support team for review & approval.

**Supplier Manager - Add a Supplier**


There are thousands of companies stored in the Foods Connected database, enter a key word in the box below to find your Supplier.

Key words that you can use to find your Supplier include: **Company Name, Factory Code, Address and Post Code.**

You may also search for your Supplier by entering the relevant details for a company site of that company.


Search for a company name, factory code, address, post code, etc...

---

 **Ingredients supplier**

100, HUE, S13 EAW, United Kingdom | info@ingredientssupplier.com | ingredientssupplier.com

---

 **Can't find the company you're looking for?**

If you can't find a company on Foods Connected, you can also add a new company as a supplier.

Simply click on the 'Add New Company as Supplier' button on the right.

### 2.1.1 IF THE COMPANY EXISTS IN THE DATABASE

**Step 1:** Company details will already be completed. Select **Next**

**Supplier Manager - Request a Supplier**

Supplier List | Supplier Attributes | Supplier Approval | Compliance | Contacts List | Supply Chain Map | Supplier Listing | Maps | Activity Overview | Admin

Company Details | Supplier Categorization \* | Associated Sites \* | Contacts & Approvers \* | Accreditations \*

Share Products

Company Name	Ingredients supplier
Address	100, HUE, Sheffield, S13 EAW, United Kingdom
Telephone	+44 123456789
Website	ingredientssupplier.com

**Step 2: Supplier Categorisation** - Now select the Supplier Type, Sub Type etc. These are the fields that you activated & setup in the Initial Setup stage. Select **Next** when done

**Supplier Manager - Request a Supplier** [← Back](#)

[Supplier List](#) [Supplier Attributes](#) [Supplier Approval](#) [Compliance](#) [Contacts List](#) [Supply Chain Map](#) [Supplier Listing](#) [Maps](#) [Activity Overview](#) [Admin](#)

[Company Details](#) [Supplier Categorization \\*](#) [Associated Sites \\*](#) [Contacts & Approvers \\*](#) [Accreditations \\*](#)

[Share Products](#)

Supplier Type

Supplier Sub Type ☒ Spices  
☐ Glazes  
☐ Nuts  
☐ Conventional - Pork  
☐ Livestock

Business Activity   
☐ Food  
☐ Fabric Mill  
☐ Manufacturer Clothing  
☐ Processor  
☐ Manufacturer  
☐ Distributor  
☐ Retailer

Business Sub Activity ☐ Boys  
☐ Girls  
☐ Shirts

Under Exception

[Cancel](#) [Next](#)

### Step 3: Associated Sites - Now select the below

**Supplied Via:** This function allows you to setup a supplier agent relationship. So you can request docs, send questionnaires to the agent instead of the suppliers. If the supplier supplier you added is supplied via an agent that you already have in your supplier list select that supplier.

**Supplier Sites:** Select the sites of that supplier that supplies you

**Request a new site:** If the suppliers site is not there then request a new site for that supplier

**Associated sites:** Select your sites that the supplier supplies into

**Lead Site:** Select your lead site

Supplier Manager - Request a Supplier
Back

Supplier List
Supplier Attributes
Supplier Approval
Compliance
Contacts List
Supply Chain Map
Supplier Listing
Maps
Activity Overview
Admin

Company Details
Supplier Categorization ✓
Associated Sites \*
Contacts & Approvers \*
Accreditations \*
Share Products

Supplied Via
Grain Merchants Ltd

Suppliers Site(s)
☒ Ingredients supplier (Group)

Can't find the site you're looking for? Request a New Site

Associated Site(s)
\* Supplier Approval Process settings has force add group active...

☒ (Group) Democo
Add Company Ref...
Add Goods Ref...

☐ Clothing
Add Company Ref...
Add Goods Ref...

☒ Factory 1
Add Company Ref...
Add Goods Ref...

☒ Factory 2
Add Company Ref...
Add Goods Ref...

☐ Factory 3
Add Company Ref...
Add Goods Ref...

☐ Factory 4
Add Company Ref...
Add Goods Ref...

☐ ...

Lead Site
Democo

Previous
Cancel
Next

#### Step 4: Contacts & Approvers - Now select the below

**Supplier Technical Contact:** Select Technical Contact

**Supplier Commercial Contact:** Select Commercial Contact

**Contacts:** If the suppliers contact are not in the list above then enter in the contacts below select their contact type

**Lead Approver:** Select Lead Approver

**Deputy Approver:** Select Deputy Approver

**Lead Technical Contact:** Select Technical Contact

**Lead Commercial Contact:** Select Commercial Contact

**Reason for Request:** Add a reason for your request

**Lead Site:** Select your lead site

**Supplier Approval Process – Additional Details:** If you have this activated, then answer the questions you created.

**Supplier Manager - Request a Supplier** ← Back

Supplier List | Supplier Attributes | Supplier Approval | Compliance | Contacts List | Supply Chain Map | Supplier Listing | Maps | Activity Overview | Admin

Company Details | Supplier Categorization \* | Associated Sites \* | **Contacts & Approvers \*** | Accreditations \*

Share Products

Supplier Technical Contact: Elaine Rogers

Supplier Commercial Contact: Gary Short

Contacts

1.		Ravi	Sharma		ravi@foodsconnected.com	Commercial Contact	Technical Contact	Is Agent
2.		Forename	Surname		Email address	Commercial Contact	Technical Contact	Is Agent
3.		Forename	Surname		Email address	Commercial Contact	Technical Contact	Is Agent

Lead Approver

Deputy Approver : -- Select Deputy --

Lead Technical Contact: Kyle Anderson

Lead Commercial Contact: Paul Armstrong

Reason for Request \*

Reason for request 0 Characters, max 4000 \*

**Supplier Approval Process - Additional Details**

Customer/Brand: Enter details....

Materials to be Supplied: Enter details....

Supplier Contact Name & Number: Enter details....

Approval Required By/Launch Date:

Is this Supplier GFSI approved?: -- Please Select --

Please Note: All of this company's Sites have been added as Suppliers. Please click 'Cancel' below to make another selection.

Previous Cancel Next

**Step 5: Accreditations** - If the supplier doesn't have any **3<sup>rd</sup> Party Accreditations** select no. But if they do select **Yes**. Fill in the details. Select **Confirm & Add Supplier**

Does this site have any 3rd Party Accreditations?

☒ Yes ☐ No

#### Accreditations and Memberships

Sedex	Starts with ZC (Company) or ZS (Company Site)
BRC Global Standard	Up to 8 digit BRC Site Code
Global Standard	13 digit GGN
Primus GFS	
Global Aquaculture Alliance Seafood	
FSSC 22000	
CANADA GAP	
Global Red Meat Standard	
JFSM	
IFS	
Red Tractor	
Rain Forest Alliance	
Fair Trade	
Kenyan Flower Council	
LEAF	
TN11 Score	
Bord Bia	

Previous

Cancel

Confirm & Add Supplier

**Step 6: Share Products** – Ability to share products with suppliers after they have been requested. When you add a new supplier you can share products & spec templates with them in one go instead of retrospectively doing this.

When you confirm & Add supplier above, If you activate **Share Products** on point 1.1.8 this will now need completed. Select **Share** when done

**Product Type:** Select Product Types you want to share with your supplier

**Products:** Then select the products

**Specification Templates:** Select the spec templates you want to share with your suppliers

**Via:** Select the agent you want to complete these specs on behalf of the supplier

**Notify User:** Select a user to notify

**Required By:** Select a required by date

**Include Message:** Include a message



Company Details
Supplier Categorization ✓
Associated Sites ✓
Contacts & Approvers ✓
Accreditations ✓
Share Products ✓

Supplier successfully requested: Select Product(s) and Specification Template(s) to share with your new supplier.

Product Type

☐ -- Animal Feed --
☒ Fats
☒ Minerals
☒ Other
☒ Rape
☒ Soya
☐ -- Clothing --

Products

<input type="checkbox"/> Site	Product Type	Product
<input type="checkbox"/> Group	Admin & Finance Fee	03 - Admin & Finance Fee
<input type="checkbox"/> Group	Avocados	8345 - Avocado
<input type="checkbox"/> Group	Beef	1001 - Topside
<input type="checkbox"/> Group	Reef	1002 - Silverside

Specification Templates

<input type="checkbox"/> Product Categories	Template Name
<input checked="" type="checkbox"/> Meat & Poultry	Meat Product Spec Template
<input type="checkbox"/> Meat & Poultry, Finished Product	Meat Retail Product Spec Template
<input type="checkbox"/> Meat & Poultry	Pork Prmal Specifications
<input type="checkbox"/> Meat & Poultry	Meat Butchery

Via:

Notify User
☒ Tester ABC - Admin
☐ -- Contacts --

Required By (Optional): 31/08/2022

Include Message (Optional):

Cancel Share

**Step 7:** If the Supplier Approval Process is activated then the supplier will now sit in the Supplier Approval Tab. Like this below

Supplier Manager

Supplier List
Supplier Attributes
**Supplier Approval**
Compliance
Contacts List
Supply Chain Map
Supplier Listing
Maps
Activity Overview
Admin

Site: All
Supplier Type: All
RFI Approved: All
Lead Technical: All
Search: 
Filter
Clear Filters

Viewing 3 results. Page 1 of 1

Supplier Name	Request Reason	Request From	Supplier Contact	RFI Status	Lead Technical		
Acme Food Co	New supplier	Steve Jones	-	✗	Steve Jones		
Drinks Ltd	New supplier	Steve Jones	Brogan Manus	✗	Steve Jones		
Joe Bloggs Food	New Supplier Required	Steve Jones	-	✗	Steve Jones		

Or If the Supplier Approval Process is not activated the supplier will now drop into your supplier list.

## 2.1.2 SUPPLIER DOESN'T EXIT IN THE DATABASE

If the supplier, you require is not available you can request a new supplier to be added which will go to the support team for approval.

### Step 1: If supplier is not there select **Add New Company as Supplier**

**Supplier Manager - Add a Supplier** ← Back


There are thousands of companies stored in the Foods Connected database, enter a key word in the box below to find your Supplier.

Key words that you can use to find your Supplier include: **Company Name, Factory Code, Address and Post Code.**

You may also search for your Supplier by entering the relevant details for a company site of that company.

Search for a company name, factory code, address, post code, etc.:  Q Search

---

 **Can't find the company you're looking for?** Add New Company as Supplier

If you can't find a company on Foods Connected, you can also add a new company as a supplier.

Simply click on the 'Add New Company as Supplier' button on the right.

### Step 2: Company Details – Fill in as much of the suppliers details as you can.

**Supplier Manager - Add a Supplier** ← Back

Company Details \* Supplier Categorization \* Associated Sites \* Contacts & Approvers \* Accreditations \*

Company Name

Nickname

EC Code / Factory Code

Telephone

Fax

Email

Website

Address Line 1

Address Line 2

Address Line 3

Town / City / Suburb

County / State

Post Code / Zipcode

Country

Cancel Next

**Step 2: Supplier Categorisation** - Now select the Supplier Type, Sub Type etc. These are the fields that you activated & setup in the Initial Setup stage. Select **Next** when done

**Supplier Manager - Request a Supplier** [← Back](#)

[Supplier List](#) [Supplier Attributes](#) [Supplier Approval](#) [Compliance](#) [Contacts List](#) [Supply Chain Map](#) [Supplier Listing](#) [Maps](#) [Activity Overview](#) [Admin](#)

[Company Details](#) [Supplier Categorization \\*](#) [Associated Sites \\*](#) [Contacts & Approvers \\*](#) [Accreditations \\*](#)

[Share Products](#)

Supplier Type

Supplier Sub Type ☒ Spices  
☐ Glazes  
☐ Nuts  
☐ Conventional - Pork  
☐ Livestock

Business Activity   
☐ Food  
☐ Fabric Mill  
☐ Manufacturer Clothing  
☐ Processor  
☐ Manufacturer  
☐ Distributor  
☐ Retailer

Business Sub Activity ☐ Boys  
☐ Girls  
☐ Shirts

Under Exception

[Cancel](#) [Next](#)

### Step 3: Associated Sites - Now select the below

**Supplied Via:** This function allows you to setup a supplier agent relationship. So you can request docs, send questionnaires to the agent instead of the suppliers. If the supplier you added is supplied via an agent that you already have in your supplier list select that supplier.

**Associated sites:** Select your sites that the supplier supplies into

**Lead Site:** Select your lead site

Supplier Manager - Add a Supplier
Back

Company Details \*
Supplier Categorization \*
Associated Sites ✓
Contacts & Approvers \*
Accreditations \*
Share Products

Supplied Via
-- Please Select --

Associated Site(s)
\* Supplier Approval Process settings has force add group active...

☒ (Group) Democo
Add Company Ref...
Add Goods Ref...

☐ Clothing
Add Company Ref...
Add Goods Ref...

☐ Factory 1
Add Company Ref...
Add Goods Ref...

☐ Factory 2
Add Company Ref...
Add Goods Ref...

☐ Factory 3
Add Company Ref...
Add Goods Ref...

☐ Factory 4
Add Company Ref...
Add Goods Ref...

☐ Factory 5
Add Company Ref...
Add Goods Ref...

Lead Site
Group

Previous
Cancel
Next

#### Step 4: Contacts & Approvers - Now select the below

**Supplier Technical Contact:** Select Technical Contact

**Supplier Commercial Contact:** Select Commercial Contact

**Contacts:** If the suppliers contact are not in the list above then enter in the contacts below select their contact type

**Lead Approver:** Select Lead Approver

**Deputy Approver:** Select Deputy Approver

**Lead Technical Contact:** Select Technical Contact

**Lead Commercial Contact:** Select Commercial Contact

**Reason for Request:** Add a reason for your request

**Lead Site:** Select your lead site

**Supplier Approval Process – Additional Details:** If you have this activated, then answer the questions you created.

Supplier Manager - Request a Supplier
Back

Supplier List
Supplier Attributes
Supplier Approval
Compliance
Contacts List
Supply Chain Map
Supplier Listing
Maps
Activity Overview
Admin

Company Details
Supplier Categorization \*
Associated Sites \*
Contacts & Approvers \*
Accreditations \*
Share Products

Supplier Technical Contact
Elaine Rogers

Supplier Commercial Contact
Gary Short

Contacts

1.	Ravi	Sharma	ravi@foodsconnected.com	Commercial Contact	Technical Contact	Is Agent
2.	Forename	Surname	Email address	Commercial Contact	Technical Contact	Is Agent
3.	Forename	Surname	Email address	Commercial Contact	Technical Contact	Is Agent

Lead Approver

Deputy Approver
-- Select Deputy --

Lead Technical Contact
Kyle Anderson

Lead Commercial Contact
Paul Armstrong

Reason for Request \*
Reason for request
0 Characters, max 4000

Supplier Approval Process - Additional Details

Customer/Brand
Enter details...

Materials to be Supplied
Enter details...

Supplier Contact Name & Number
Enter details...

Approval Required By/Launch Date

Is this Supplier GFSI approved?
-- Please Select --

Please Note: All of this company's Sites have been added as Suppliers. Please click 'Cancel' below to make another selection.

Previous
Cancel
Next

**Step 5: Accreditations** - If the supplier doesn't have any **3<sup>rd</sup> Party Accreditations** select no. But if they do select **Yes**. Fill in the details. Select **Confirm & Add Supplier**

Does this site have any 3rd Party Accreditations?

☒ Yes ☐ No

Accreditations and Memberships

Sedex	<input type="text" value="Starts with ZC (Company) or ZS (Company Site)"/>
BRC Global Standard	<input type="text" value="Up to 8 digit BRC Site Code"/>
Global Standard	<input type="text" value="13 digit GGN"/>
Primus GFS	<input type="text"/>
Global Aquaculture Alliance Seafood	<input type="text"/>
FSSC 22000	<input type="text"/>
CANADA GAP	<input type="text"/>
Global Red Meat Standard	<input type="text"/>
JFSM	<input type="text"/>
IFS	<input type="text"/>
Red Tractor	<input type="text"/>
Rain Forest Alliance	<input type="text"/>
Fair Trade	<input type="text"/>
Kenyan Flower Council	<input type="text"/>
LEAF	<input type="text"/>
TN11 Score	<input type="text"/>
Bord Bia	<input type="text"/>

[Previous](#)

[Cancel](#)

[Confirm & Add Supplier](#)

**Step 6: Share Products** – Ability to share products with suppliers after they have been requested. When you add a new supplier you can share products & spec templates with them in one go instead of retrospectively doing this.

When you confirm & Add supplier above, If you activate **Share Products** on point 1.1.8 this will now need completed. Select **Share** when done

**Product Type:** Select Product Types you want to share with your supplier

**Products:** Then select the products

**Specification Templates:** Select the spec templates you want to share with your suppliers

**Via:** Select the agent you want to complete these specs on behalf of the supplier

**Notify User:** Select a user to notify

**Required By:** Select a required by date

**Include Message:** Include a message

Company Details

Supplier Categorization ✓

Associated Sites ✓

Contacts & Approvers ✓

Accreditations ✓

Share Products ✓

Supplier successfully requested: Select Product(s) and Specification Template(s) to share with your new supplier.

Product Type

☐ -- Animal Feed --
 ☒ Fats
 ☒ Minerals
 ☒ Other
 ☒ Rape
 ☒ Soya
 ☐ -- Clothing --

Products

<input type="checkbox"/> Site	Product Type	Product
<input type="checkbox"/> Group	Admin & Finance Fee	03 - Admin & Finance Fee
<input type="checkbox"/> Group	Avocados	8345 - Avocado
<input type="checkbox"/> Group	Beef	1001 - Topside
<input type="checkbox"/> Group	Beef	1002 - Silverside

Specification Templates

<input type="checkbox"/> Product Categories	Template Name
<input checked="" type="checkbox"/> Meat & Poultry	Meat Product Spec Template
<input type="checkbox"/> Meat & Poultry, Finished Product	Meat Retail Product Spec Template
<input type="checkbox"/> Meat & Poultry	Pork Primal Specifications
<input type="checkbox"/> Meat & Poultry	Meat Butchery

Via

- None -

Notify User

☒ Tester ABC - Admin
 ☐ -- Contacts --

Required By (Optional)

31/08/2022

Include Message (Optional)

Cancel

Share

**Step 7:** If the Supplier Approval Process is activated then the supplier will now sit in the Supplier Approval Tab. Like this below

**Supplier Manager**

Supplier List | Supplier Attributes | **Supplier Approval** | Compliance | Contacts List | Supply Chain Map | Supplier Listing | Maps | Activity Overview | Admin

Site: All | Supplier Type: All | RFI Approved: All | Lead Technical: All | Search: Search Supplier Name... | Filter | Clear Filters

Viewing 3 results. Page 1 of 1

Supplier Name	Request Reason	Request From	Supplier Contact	RFI Status	Lead Technical		
Acme Food Co	New supplier	Steve Jones	-	✗	Steve Jones	👤	▼
Drinks Ltd	New supplier	Steve Jones	Brogan Manus	✗	Steve Jones	👤	▼
Joe Bloggs Food	New Supplier Required	Steve Jones	-	✗	Steve Jones	👤	▼

Or If the Supplier Approval Process is not activated the supplier will now drop into your supplier list.

## 2.2 IMPORTING SUPPLIERS

**Step 1:** Go to the **Supplier Manager** under the Supplier Approval Tab select **Supplier List**

**Supplier Manager**

**Supplier List** | Supplier Attributes | Supplier Approval | Compliance | Contacts List | Supply Chain Map | Supplier Listing | Maps | Activity Overview | Admin

Site: Democo (Group) | Supplier Type: All | Status: All | Country: All | Search: Search... | Filter | Clear Filters

Supplier Sub Type: All | Supplied Via: All | Lead Technical: All | Compliant Level: All

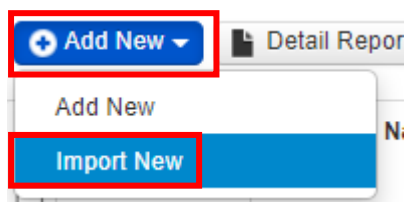
Business Activity: All | Business Sub Activity: All | Under Exception: All

+ Add New | Detail Reports | Export to Excel | Summary Report | Bulk Update | Map View | Via Chain View | Attributes

Viewing 109 results. Page 1 of 3

	Factory Code(s)	Company Name	Country	Supplier Type	Supplier Sub Type	Lead Technical	Under Exception	Supplied Via	Linked Customer	Status	Compliant	
<input type="checkbox"/>	US 323232	Abattoir 1	United States	Meat Processor	Beef, Lamb, Pork	Steve Jones				Approved	Compliant	📍 View
<input type="checkbox"/>	1234	ABC Laboratories	New Zealand	Laboratory						Delisted	N/A	📍 View
<input type="checkbox"/>	NZ 347761	ABC Snacks Ltd	United Kingdom	Snacks	Biscuits & Cakes	Steve Jones				Approved	Compliant	📍 View
<input type="checkbox"/>		Acme Food Co	Eng & Wales (UK)	Poultry Farm	Free Range, Organic, Chicken	Steve Jones				In Progress	Requires Your Action	📍 View

**Step 2:** Select **Add New & Import New**





### Step 3: Export the template for Importing.

Supplier Manager - Supplier Import ← Back to Supplier List

Imported 
 Uploaded On 
 Status

No imports to display

**Step 4:** Fill in as much detail as possible populating all the data relating to your supplier Manager Columns (note All columns highlighted in grey **must** be filled in or the import wont work) and **save** the file to your computer.

	A	B	C	D	E	F	G	H	I
1	Company Name	Site Name	Global Gap Number	Factory Code	Supplier Ref	Supplier Type	Supplier Sub Type	Business Activity	BRC Category
2									
3									
4									
5									
6									

- **Company Name & Site names** - To be added. i.e. Company name – Hilton Food Group. Site Name – Hilton Foods UK.  
**PLEASE NOTE:** Agents are added to the supplier list like any other supplier.

	A	B	C
1	Company Name	Site Name	Global Gap Number
2	Direct supplier 1		
3	Direct supplier 2	Coleraine Site	
4	Agent 1		
5			

- **Supplier Types & Sub types** – These need to be already setup in FC per customers' requirements

F	G
Supplier Type	Supplier Sub Type
Manufacturer	Raw Material
Manufacturer	Raw Material
Agent	Raw Material

- **Associated sites** – Is the customer sites that the supplier supplies. If supplier supplies multiple sites of the customers space out by a comma. Make sure the sites are spelt exactly as they are spelt in FC. i.e. for Hilton sites names on this column would look like this – Hilton Foods UK, Hilton Foods Holland, HFG Sverige

H
Associated Sites
Customer site 1, Customer site 5
Customer site 1, Customer site 5
Customer site 3

- **Via company name** – This is where the customer adds the agent for the supplier. The agents name needs to be spelt exactly like they have in the excel file. If a supplier is supplied via multiple agents then add these but space with a comma like above.

A	B	C	D	E	F	G	H	I
Company Name	Site Name	Global Gap Numbr	Factory Code	Supplier F	Supplier Type	Supplier Sub Type	Associated Sites	Via Company Name
Direct supplier 1			ES 12 00303/SE CE		Manufacturer	Raw Material	Customer site 1, Customer site 5	
Direct supplier 2	Coleraine Site				Manufacturer	Raw Material	Customer site 1, Customer site 5	Agent 1
Agent 1			DL199		Agent	Raw Material	Customer site 3	

- **Address** – Make sure address is fully filled in with postcode. The file will not validate when imported if there is no postcode. For countries where there may be no postcode. Tell your customer to add 12345
- **Technical Contact name & Tech contact Email** – Make sure your customers add the contacts for their suppliers as well. This is important and saves time adding manually. It's important that they only put contacts beside suppliers they are getting **direct supply from** or **from agents**. THEY DO NOT NEED TO ADD THE CONTACT ON THIS LIST FOR SUPPLIERS SUPPLIED VIA AGENTS. As this is done through the relationship of when you state which agent a supplier is supplied through.

Company Name	Via Company Name	Lead Technical	Address Line 1	Address Line 2	Address Line 3	Town	City	County	Post Code	Country	Latitude	Longitude	Technical Contact	Technical Contact Email
Direct supplier 1			Pol. Ind. Principe de Gales, S/N			Isla Mayor	Seville		41140	Spain			John Smyth	<a href="mailto:john.smyth@supplier.com">john.smyth@supplier.com</a>
Direct supplier 2	Agent 1		3E/7 Pho Quang Street	Ward 2	Tan Binh District		Ho Chi Minh City			Vietnam				
Agent 1			N1 Road	Lot B	An Nghiep Industrial Zone			Soc Trang Province		Vietnam			Frank Brown	<a href="mailto:frank.brown@agent.com">frank.brown@agent.com</a>

- **Rest of the fields are not important** – The fields I we have highlighted above are the fields to concentrate on for importing

### 2.1.1 Checklist for Supplier Sheet

- Check that suppliers added are actually not sites of a bigger group – Check FC system & use internet - If they are change setup on the sheet
- Make sure **Site** names are correct – Check FC system & use internet
- Check that any of the customers sites added to **Associated Sites** are spelt correctly exactly like in FC.

- Check that any of the Agents added to **Via Company Name** are spelt correctly exactly like on the sheet
- Make sure **Post Codes** are added
- Check that tech contacts URL of mail matches their company name.

**Step 5:** Now import your suppliers in the front end by selecting **Add New > Import New**

The screenshot shows the 'Supplier Manager' interface. At the top, there are two tabs: 'Supplier List' (selected) and 'Supplier Attributes'. Below the tabs, there are three dropdown menus: 'Site' (set to 'Foods Connecte'), 'Supplier Sub Type' (set to 'All'), and 'Business Activity' (set to 'All'). To the right of these are three empty input fields labeled 'Suppli', 'Suppli', and 'Busine'. Below the dropdowns, there is a blue button with a plus icon and the text 'Add New'. A red box highlights this button and its dropdown menu, which contains two options: 'Add New' and 'Import New'. To the right of the 'Add New' button is a 'Detail Reports' dropdown menu and a document icon. Below the 'Add New' button, there is a 'Company Name' input field.

**Step 6:** Select **Import**

The screenshot shows the 'Supplier Manager - Supplier' interface. At the top, there are two tabs: 'Supplier List' (selected) and 'Supplier Attributes'. Below the tabs, there is a blue button with the text 'Import'. A red box highlights this button. To the right of the 'Import' button is an 'Export Template' dropdown menu.

## Step 7: Add file & Upload

**Supplier Manager - Supplier Import**

Supplier List Supplier Attributes Customer Approved List Compliance Con

Import File

Choose file Test sup...liers.xlsx

Upload

**Step 8:** Now validate the suppliers that haven't got the correct data for FC. You can see as they have a red warning sign & a red exclamation mark beside where the data is missing. Looks like this below.

**Supplier Manager - Supplier Import** [Back to Supplier List](#)

Supplier List Supplier Attributes Customer Approved List Compliance Contacts List Maps Activity Overview Admin

Valid Supplier Count: 0 [Import Valid Suppliers](#) Invalid Supplier Count: 3 [Validate Data](#)

Search...

	Company Name	Site Name	Factory Code	Address	Supplier Type	Supplier Sub Type	Associated Sites	Via Company	Lead Technical	Users	Status	
⚠	Alfocan		ES 12.00303/SE CE	Pol. Ind. Principe de Gales, S/N Isla Mayor Seville Spain 41140	Seafood ✓	Fish ✓	Site1 !			No contact - Commercial Contact !	Data Error	<a href="#">Fix Errors</a>
⚠	Amanda Seafoods	Amanda Seafoods		3E/7 Pho Quang Street Ward 2 Ho Chi Minh City Vietnam 12345	Seafood ✓	Fish ✓	Site 1			Mac Thi Thuy Thuy.mt@amandaseafood.com - Technical Contact	Data Error	<a href="#">Fix Errors</a>
⚠	Saota	Sao Ta	DL199	N1 Road Lot B Soc Trang Province Vietnam !	Seafood ✓	Fish ✓	Site 1	Amanda Seafoods		Mac Thi Thuy Thuy.mt@amandaseafood.com - Technical Contact	Data Error	<a href="#">Fix Errors</a>

**Step 9:** To correct each supplier you can select **Fix Errors** then save.

	Company Name	Site Name	Factory Code	Address	Supplier Type	Supplier Sub Type	Associated Sites	Via Company	Lead Technical	Users	Status	
⚠	Alfocan		ES 12.00303/SE	Pol. Ind. Principe de	Seafood ✓	Fish ✓	Site1 !			No contact - Commercial Contact !	Data Error	<a href="#">Fix Errors</a>

Or you can go back to your supplier sheet amend there. Then delete out your in-progress import.

**Supplier Manager - Supplier Import** ← Back to Supplier List

Supplier List Supplier Attributes Customer Approved List Compliance Contacts List Maps Activity Overview Admin

Import Export Template

Imported File Name	Uploaded On	Status		
Test supplier list for how to import suppliers.xlsx	29/06/2022 09:35:55	In Progress	Edit	Delete

Then reimport again.

**Supplier Manager - Supplier**

Supplier List Supplier Attributes

Import Export Template

**Step 10:** Ultimately you want your validator page to look like this below

Valid Supplier Count: 3 Import Valid Suppliers Invalid Supplier Count: 0 Validate Data

Q

Search...

Company Name	Site Name	Factory Code	Address	Supplier Type	Supplier Sub Type	Associated Sites	Lead Technical	Users	Status
✓ Alfocan		ES 12.00303/SE CE	Pol. Ind. Principe de Gales, S/N Isla Mayor Seville Spain 41140	Seafood ✓	Fish ✓	Site 1	Roger McCracken		In Progress
✓ Amanda Seafoods	Amanda Seafoods		3E/7 Pho Quang Street Ward 2 Ho Chi Minh City Vietnam 12345	Seafood ✓	Fish ✓	Site 1	Roger McCracken	Mac Thi Thuy Thuy.mt@amandaseafood.com - Technical Contact	In Progress
✓ Saota	Sao Ta	DL199	N1 Road Lot B Soc Trang Provice Vietnam 123454	Seafood ✓	Fish ✓	Site 1	Roger McCracken	Mac Thi Thuy Thuy.mt@amandaseafood.com - Technical Contact	In Progress

**Step 11:** When all is valid select **Import Valid Suppliers**

Valid Supplier Count: 3 Import Valid Suppliers Invalid Supplier Count: 0 Validate Data

Search...

Company Name	Site Name	Factory Code	Address	Supplier Type	Supplier Sub Type	Associated Sites	Lead Technical	Users	Status
✓ Alfocan		ES 12.00303/SE CE	Pol. Ind. Principe de Gales, S/N Isla Mayor Seville Spain 41140	Seafood ✓	Fish ✓	Site 1	Roger McCracken		In Progress
✓ Amanda Seafoods	Amanda Seafoods		3E/7 Pho Quang Street Ward 2 Ho Chi Minh City Vietnam 12345	Seafood ✓	Fish ✓	Site 1	Roger McCracken	Mac Thi Thuy Thuy.mt@amandaseafood.com - Technical Contact	In Progress
✓ Saota	Sao Ta	DL199	N1 Road Lot B Soc Trang Province Vietnam 123454	Seafood ✓	Fish ✓	Site 1	Roger McCracken	Mac Thi Thuy Thuy.mt@amandaseafood.com - Technical Contact	In Progress

**Step 12:** Suppliers will now be imported to the backend. This stage will be the responsibility of Foods Connected support team. Please liaise with them to discuss next steps.

### 3. USING THE SUPPLIER APPROVAL PROCESS

**The Supplier Approval Process:** Allows you to create a specific process & rules in Foods Connected to approve your suppliers. They will sit in this tab until they are fully approved then they will drop into your main supplier list.

If you have the Supplier Approval Process activated and use it, please follow these steps below.

#### 3.1 VERIFICATION REQUESTS – HOW TO VERIFY

If you have the Supplier Verification Activated on point 1.4.1 this means that when someone adds a new supplier the supplier will need verified first before they drop into the supplier approval tab.

**Step 1:** Go to **Supplier Manager > Supplier Approval > Verification Requests**

The screenshot shows the 'Supplier Manager' interface. The 'Supplier Approval' tab is selected. A dropdown menu for 'New Supplier Requests' is open, showing 'Verification Requests'. The interface includes various filters for Site, Supplier Sub Type, Business Activity, Status, Country, and Search. At the bottom, there are buttons for 'Add New', 'Detail Reports', 'Export to Excel', 'Summary Report', 'Bulk Update', 'Map View', 'Via Chain View', and 'Attributes'. The status 'Viewing 109 results. Page 1 of 3' is displayed at the bottom right.

**Step 2:** To verify select **Verify** & to Reject the supplier select **Reject**

The screenshot shows the 'Supplier Manager' interface with the 'Supplier Approval' tab selected. A table of verification requests is displayed. The table has columns for Supplier Name, Supplier Type, Request Reason, Request From, and Supplier Contact. The first row shows 'Tester ABC - Site 1' with 'Ingredients' as the Supplier Type and 'Reason' as the Request Reason. The 'Request From' is 'Steve Jones' and the 'Supplier Contact' is 'Tester ABC - Admin'. The 'Verify' and 'Reject' buttons are highlighted with a red box.

Supplier Name	Supplier Type	Request Reason	Request From	Supplier Contact	Verify	Reject
Tester ABC - Site 1	Ingredients	Reason	Steve Jones	Tester ABC - Admin	Verify	Reject
UserX	Ingredients	reason	Steve Jones	Oliveira Antunes	Verify	Reject
UserX - UserX Site 1 - Tester	Ingredients	reason	Steve Jones	Oliveira Antunes	Verify	Reject
Foods Connected Ltd	Ingredients	reason	Steve Jones	Gemma Devine	Verify	Reject

### Step 3: Select Verify Supplier

Verify Supplier ×

Are you sure you wish to verify this Supplier?

Cancel **Verify Supplier**

### Step 4: Your supplier now appears in the **New Supplier Request** tab under Supplier Approval

**Supplier Manager**

Supplier List **Supplier Approval** Compliance Contacts List Supply Chain Map Supplier Listing Maps Activity Overview Admin

**New Supplier Requests**

Site: All Status: All RFI Approved: All Lead Technical: All Search: Search Supplier Name... Filter Clear Filters

Viewing 4 results. Page 1 of 1

Supplier Name	Request Reason	Request From	Supplier Contact	RFI Status	Lead Technical		
Acme Food Co	New supplier	Steve Jones	-	×	Steve Jones		
Drinks Ltd	New supplier	Steve Jones	Brogan Manus	×	Steve Jones		
Joe Bloggs Food	New Supplier Required	Steve Jones	-	×	Steve Jones		
Tester ABC - Site 1	Reason	Steve Jones	Tester ABC - Admin	×	-- Click to Set --		

## 3.2 NEW SUPPLIER REQUESTS/ SUPPLIER APPROVAL – HOW TO USE

If you have the Supplier Approval Process activated and your supplier has been verified or maybe you didn't use that function the Supplier now sits in your list.

This where you can monitor their process on being approved on the rules that you setup. If you have setup automatic requests for documents, send questionnaires etc you just need to wait for your suppliers to complete request. If you haven't setup automatic request you need to manually do these requests on each tool.

### 3.2.1 RFI STATUS – HOW TO SEND RFI REQUEST & HOW IT'S APPROVED.

**Step 1:** RFI Status if you have RFI activated on step 1.4.1 then you need to request your questionnaire to be completed. Hover over the x on RFI status then select

Supplier Manager

Supplier List

Supplier Attributes

Supplier Approval

Compliance

Contacts List

Supply Chain Map

Supplier Listing

Maps

Activity Overview

Admin

Site

Supplier Type

RFI Approved

Lead Technical

Search

All

All

All

All

Search Supplier Name...

Filter

Clear Filters

Viewing 4 results. Page 1 of 1

Supplier Name	Request Reason	Request From	Supplier Contact	RFI Status	Lead Technical		
Acme Food Co	New supplier	Steve Jones	-		Steve Jones		
Drinks Ltd	New supplier	Steve Jones	Brogan Manus		Steve Jones		
Joe Bloggs Food	New Supplier Required	Steve Jones	John Smith		Steve Jones		
Tester ABC - Site 1	Reason	Steve Jones	Tester ABC - Admin		-- Click to Set --		

### Step 2: Now select Send RFI Document

#### Approve - Joe Bloggs Food

Request By	Steve Jones
Reason for Request	New Supplier Required
RFI Document	New Supplier Questionnaire (DR, S, Tri, Pag)
Recipient / Contact	John Smith
Respond By Date	06/09/2022
Message (Optional)	<input type="text" value="Enter a message..."/>
<div> <span>Cancel</span> <span> Send RFI Document</span> </div>	

**Step 3:** Once sent the RFI status will now look like this below.

Joe Bloggs Food	New Supplier Required	Steve Jones	John Smith		Steve Jones		
-----------------	-----------------------	-------------	------------	--	-------------	--	--

**Step 4:** Once that RFI has been completed the status will look like this below

Joe Bloggs Food	New Supplier Required	Steve Jones	John Smith		Steve Jones		
-----------------	-----------------------	-------------	------------	--	-------------	--	--



### 3.2.2 THE APPROVAL PROCESS

#### Step 1: Open up the new supplier's dropdown

If you have added additional questions/rules from step 1.2.1.9 they will appear like below  
Where you can answer & upload docs.

Additional Information	
Customer/Brand	Customer
Materials to be Supplied	Materials
Supplier Contact Name & Number	Nam
Approval Required By/Launch Date	31/12/2022
Is this Supplier GFSI approved?	NO GFSI Certification

Group

COMPANY PROFILE	Non-compliant - Company profile last updated on: Never Updated
DOCUMENT SHARES	Shared Documents - 0/0 Signed Off
DOCUMENT REQUESTS	Documents - 0/0 Mandatory Document(s) Uploaded
QUESTIONNAIRES	Sent Questionnaires - 0/0 Completed
RISK ASSESSMENTS	Sent Risk Assessments - 0/0 Completed
SUPPLIER AUDITS	Sent Supplier Audits - 0/0 Completed
SUPPLIER CHECKS	Non Mandatory Supplier Checks - 0/0 Completed
TRACEABILITY CHECKS	Sent Traceability Checks - 0/0 Completed
CUSTOMER APPROVED LISTS	Outstanding - N/A






  

**Additional Checks**
Click Flags Below to Complete...








Add question here? - Incomplete	Add Additional Comment Upon Completion...	
Supplier approval additional rules? - Incomplete	Add Additional Comment Upon Completion...	

Decline

**Step 2:** As the supplier completes requests, the approval tabs will turn green like below

Group		
COMPANY PROFILE	<input checked="" type="checkbox"/> Compliant - Company profile last updated on: 04/11/2021	
DOCUMENT SHARES	<a href="#">Shared Documents</a> - 1/1 Signed Off	
DOCUMENT REQUESTS	Documents - 1/2 Mandatory Document(s) Uploaded <b>Not Uploaded Documents</b> - All documents in this list are required - Global Gap	
QUESTIONNAIRES	<a href="#">Sent Questionnaires</a> - 1/2 Completed - Supplier Sustainability Questionnaire (Awaiting Response)	
SUPPLIER AUDITS	<a href="#">Sent Supplier Audits</a> - 0/0 Completed	

**Step 3:** Now that all the tabs are green

Group		
COMPANY PROFILE	<input checked="" type="checkbox"/> Compliant - Company profile last updated on: 12/01/2022	
DOCUMENT SHARES	<a href="#">Shared Documents</a> - 1/1 Signed Off	
DOCUMENT REQUESTS	Documents - 1/1 Mandatory Document(s) Uploaded	
QUESTIONNAIRES	<a href="#">Sent Questionnaires</a> - 1/1 Completed	
SUPPLIER AUDITS	<a href="#">Sent Supplier Audits</a> - 1/1 Completed	
<b>Additional Checks</b> <span>Click Flags Below to Complete...</span>		
Add question here? - Complete	<input type="checkbox"/> <input type="checkbox"/> Complete	
Supplier approval additional rules? - Complete	<input type="checkbox"/> <input type="checkbox"/> Complete	

**Step 4:** Once your supplier is fully green, they will now drop into your main supplier list. Where they will now be governed by the compliance rules you setup.

### 3.2.2.1 Override Supplier Compliance

If you have the **Compliance Override** turned on in the **Supplier Approval Admin > General Settings 1.4.1** you will see the **Approve** button like below when your supplier sits in the Approval Process. This means that if at any stage you just want to override the supplier approval process and set supplier as approved just select Approve. They will then drop into your main supplier list.

Group	
COMPANY PROFILE	<input checked="" type="checkbox"/> Compliant - Company profile last updated on: 04/11/2021
DOCUMENT SHARES	<a href="#">Shared Documents</a> - 1/1 Signed Off
DOCUMENT REQUESTS	Documents - 1/2 Mandatory Document(s) Uploaded <input checked="" type="checkbox"/> Not Uploaded Documents - All documents in this list are required - Global Gap
QUESTIONNAIRES	<a href="#">Sent Questionnaires</a> - 1/2 Completed - Supplier Sustainability Questionnaire (Awaiting Response)
SUPPLIER AUDITS	<a href="#">Sent Supplier Audits</a> - 0/0 Completed

## 4. ACCESSING YOUR SUPPLIER LIST

**Step 1:** From the **Supplier Approval** menu at the top of the page, select **Supplier Manager**

**Step 2:** Your **Supplier list** will open with the filters at the top, use the filters to find the specific results you are looking for.

**Supplier Manager**

**Supplier List** | Supplier Attributes | Customer Approved List | Compliance | Contacts List | Maps | Activity Overview | Admin

Default

Site:  | 
 Supplier Type:  | 
 Status:  | 
 Country:  | 
 Search:

Supplier Sub Type:  | 
 Supplied Via:  | 
 Lead Technical:  | 
 Supplier Lead Technical:  | 
 Lead Commercial:  | 
 Compliant Level:

Business Activity:  | 
 Business Sub Activity:  | 
 Season:  | 
 Supplier Tier:  | 
 Path Point 1:

| 
 | 
 | 
 | 
 | 
 | 
 |

Viewing 20 results. Page 1 of 1

	Factory Code(s)	Company Name	Country	Company Ref	Supplier Type	Supplier Sub Type	Business Activity	Path Point 1	Last Audit Details	Lead Technical	Supplier Lead Technical	Lead Commercial	Season	Supplier Tier	Supplied Via	Status	Compliant	
<input type="checkbox"/>		CPF - Demo 1	United Kingdom		Meat	Chicken	Processing				Demo Supplier 3		Jan, Feb, April			Delisted	N/A	<input type="button" value="View"/>

## 5. VIEWING SUPPLIER DETAILS – AND SUPPLIER DETAIL MANAGEMENT

**Step 1:** From your supplier list in the Supplier Manager, click on the **View** button beside the supplier whose details you want to view.

**Supplier Manager**

Supplier List | Supplier Attributes | Supplier Approval | Compliance | Contacts List | Supply Chain Map | Supplier Listing | Maps | Activity Overview | Admin

Default | Custom View 1

Site: Democo (Group) | Supplier Type: All | Status: All | Country: All | Search: Search... | Filter | Clear Filters

Supplier Sub Type: All | Supplied Via: All | Lead Technical: All | Compliant Level: All

Business Activity: All | Business Sub Activity: All | Under Exception: All

Add New | Detail Reports | Export to Excel | Summary Report | Bulk Update | Map View | Via Chain View | Attributes

Viewing 110 results. Page 1 of 3

	Factory Code(s)	Company Name	Country	Supplier Type	Supplier Sub Type	Lead Technical	Under Exception	Supplied Via	Linked Customer	Status	Compliant	View
<input type="checkbox"/>	US 323232	Abattoir 1	United States	Meat Processor	Beef, Lamb, Pork	Steve Jones				Approved	Compliant	View
<input type="checkbox"/>	1234	ABC Laboratories	New Zealand	Laboratory						Delisted	N/A	View
<input type="checkbox"/>	NZ 347761	ABC Snacks Ltd	United Kingdom	Snacks	Biscuits & Cakes	Steve Jones				Approved	Compliant	View
<input type="checkbox"/>		Acme Food Co	Eng & Wales (UK)	Poultry Farm	Free Range, Organic, Chicken	Steve Jones				In Progress	Requires Your Action	View
<input type="checkbox"/>	EC 343434	Acorn Produce	United Kingdom	Fruit ' Grower'	Apples, Pears	Steve Jones		Fruit e Frutta		Requires Review	Non-Compliant	View
<input type="checkbox"/>		Agent	Australia	Agent / Broker		Tom Redden				Requires Review	Non-Compliant	View

**Step 2:** The supplier's profile will open, and you'll be able to see their full details including their active contacts on FC and what data they currently have on the system.

You can also see these other sub headings for that Supplier. Overview on headings below

**Associated Sites:** Are the sites of your company that are related to this supplier

**Supplier Data:** Is the quick view of all the completed data and forms for the supplier without having to go into each tool and search

**Location:** The location of the supplier on a map

**Compliancy:** The compliancy status of the supplier for ongoing approval

**Contacts:** A list of active supplier contacts

**Notes:** Any specific notes you want to hold on the supplier

**Accessible data:** Is where you can share products, templates & Supplier lists with your suppliers to allow them to use on your companies' behalf

**Data Forms:** Data forms is further forms you might want to create to hold info on your suppliers

## 5.1 PROFILE – SUPPLIERS PROFILE & UPDATING DETAILS

**Step 1:** Updates can be requested from the Supplier if they are new & not linked to any other customer. (This function is usually not accessible)

Linked FC Company	CPF - Demo 1
Telephone	012 2312312323
Email	demo@foodsconnected.com
Address	United Kingdom
Country	United Kingdom
Coordinates	55.378051,-3.435973
Local Currency	US Dollar
<a href="#">Request Updates</a>	

Season	Jan, Feb, April
Supplied Via	
Supplied Via Access	No
Associated Sites	Group
<a href="#">Update Details</a>	

**Step 2:** Update details allows you to access further info. Select **Update Details**

**Nickname:** Give your supplier a nickname

**Custom Fields:** Any custom fields you create in point 1.1.3 can be accessed here & options selected.

**Supplier Colour:** Colour code your suppliers for widgets

**Supplied Via Access:** Allows suppliers to see other suppliers that are setup with them as their supplied via

**Supplier Deletion:** Delete a supplier

Abattoir 1 - Update Details
[Return to Supplier Manager](#)

Profile
Associated Sites
Supplier Data
Location
Compliance
Contacts
Notes
Accessible Data
Data Forms

Nickname

Under Exception

Supplier Colour

Enable this supplier to view other suppliers that are setup with them as their 'Supplied Via'

☒
[View colours for other suppliers](#)

Supplied Via Access
☒

**Supplier Deletion:**

To delete this Supplier [Click Here](#). If you wish to simply unassociate an individual site from the Supplier you can do this via the 'Associated Sites' tab above.

### 5.1.1 CUSTOM FIELDS – SELECTING OR INPUTTING OPTIONS

Once you have your custom fields activated & setup. And after you have added a new supplier if you want to amend that custom field you need to follow the below steps.

#### Step 1: Select **Supplier Manager** > Select **View** beside supplier

**Supplier Manager**

Supplier List | Supplier Attributes | Supplier Approval | Compliance | Contacts List | Supply Chain Map | Supplier Listing | Maps | Activity Overview | Admin

Default | Custom View 1

Site: Democo (Group) | Supplier Type: All | Status: All | Country: All | Search: Search... | Filter | Clear Filters

Supplier Sub Type: All | Supplied Via: All | Lead Technical: All | Compliant Level: All

Business Activity: All | Business Sub Activity: All | Under Exception: All

+ Add New | Detail Reports | Export to Excel | Summary Report | Bulk Update | Map View | Via Chain View | Attributes

Viewing 110 results. Page 1 of 3

	Factory Code(s)	Company Name	Country	Supplier Type	Supplier Sub Type	Lead Technical	Under Exception	Supplied Via	Linked Customer	Status	Compliant	
<input type="checkbox"/>	US 323232	Abattoir 1	United States	Meat Processor	Beef, Lamb, Pork	Steve Jones				Approved	Compliant	<b>View</b>
<input type="checkbox"/>	1234	ABC Laboratories	New Zealand	Laboratory						Delisted	N/A	View
<input type="checkbox"/>	NZ 347761	ABC Snacks Ltd	United Kingdom	Snacks	Biscuits & Cakes	Steve Jones				Approved	Compliant	View
<input type="checkbox"/>		Acme Food Co	Eng & Wales (UK)	Poultry Farm	Free Range, Organic, Chicken	Steve Jones				In Progress	Requires Your Action	View
<input type="checkbox"/>	EC 343434	Acorn Produce	United Kingdom	Fruit ' Grower'	Apples, Pears	Steve Jones		Fruit e Frutta		Requires Review	Non-Compliant	View
<input type="checkbox"/>		Agent	Australia	Agent / Broker		Tom Redden				Requires Review	Non-Compliant	View

#### Step 2: Now select **Update Details** on the **Profile** tab

Linked FC Company	CPF - Demo 1
Telephone	012 2312312323
Email	demo@foodsconnected.com
Address	United Kingdom
Country	United Kingdom
Coordinates	55.378051,-3.435973
Local Currency	US Dollar
<b>Request Updates</b>	

Season	Jan, Feb, April
Supplied Via	
Supplied Via Access	No
Associated Sites	Group
<b>Update Details</b>	

**Step 3:** You can now see the custom fields you setup. Select your options or type in what you need. This is an example of a custom field. You may have more than 1 custom field

Once done select **Save**

**Abattoir 1 - Update Details** [Return to Supplier Manager](#)

**Profile** | Associated Sites | Supplier Data | Location | Compliance | Contacts | Notes | Accessible Data | Data Forms

Nickname:

Under Exception:

Supplier Colour:

**Enable this supplier to view other suppliers that are setup with them as their 'Supplied Via'** ☐ [View colours for other suppliers](#)

Supplied Via Access:

**Supplier Deletion:**  
To delete this Supplier [Click Here](#). If you wish to simply unassociate an individual site from the Supplier you can do this via the 'Associated Sites' tab above.

### 5.1.2 SUPPLIER DELETION – HOW TO DELETE A SUPPLIER FROM YOUR LIST

If you ever need to delete a supplier fully from your list. Please follow the steps below.

**Step 1:** Select **Supplier Manager** > Select **View** beside supplier

**Supplier Manager**

**Supplier List** | Supplier Attributes | Supplier Approval | Compliance | Contacts List | Supply Chain Map | Supplier Listing | Maps | Activity Overview | Admin

**Default** | Custom View 1

Site:  | Supplier Type:  | Status:  | Country:  | Search:

Supplier Sub Type:  | Supplied Via:  | Lead Technical:  | Compliant Level:

Business Activity:  | Business Sub Activity:  | Under Exception:

Viewing 110 results. Page 1 of 3

	Factory Code(s)	Company Name	Country	Supplier Type	Supplier Sub Type	Lead Technical	Under Exception	Supplied Via	Linked Customer	Status	Compliant	
<input type="checkbox"/>	US 323232	Abattoir 1	United States	Meat Processor	Beef, Lamb, Pork	Steve Jones				Approved	Compliant	<input type="button" value="View"/>
<input type="checkbox"/>	1234	ABC Laboratories	New Zealand	Laboratory						Delisted	N/A	<input type="button" value="View"/>
<input type="checkbox"/>	NZ 347761	ABC Snacks Ltd	United Kingdom	Snacks	Biscuits & Cakes	Steve Jones				Approved	Compliant	<input type="button" value="View"/>
<input type="checkbox"/>		Acme Food Co	Eng & Wales (UK)	Poultry Farm	Free Range, Organic, Chicken	Steve Jones				In Progress	Requires Your Action	<input type="button" value="View"/>
<input type="checkbox"/>	EC 343434	Acorn Produce	United Kingdom	Fruit 'Grower'	Apples, Pears	Steve Jones		Fruit e Frutta		Requires Review	Non-Compliant	<input type="button" value="View"/>
<input type="checkbox"/>		Agent	Australia	Agent / Broker		Tom Redden				Requires Review	Non-Compliant	<input type="button" value="View"/>

## Step 2: Now select **Update Details** on the **Profile** tab

Linked FC Company	CPF - Demo 1
Telephone	012 2312312323
Email	demo@foodsconnected.com
Address	United Kingdom
Country	United Kingdom
Coordinates	55.378051,-3.435973
Local Currency	US Dollar
<a href="#">Request Updates</a>	

Season	Jan, Feb, April
Supplied Via	
Supplied Via Access	No
Associated Sites	Group
<a href="#">Update Details</a>	

## Step 3: You can now see the **Supplier Deletion** option. Select **Click Here** to delete. Then Delete.

**Abattoir 1 - Update Details** [Return to Supplier Manager](#)

Profile Associated Sites Supplier Data Location Compliance Contacts Notes Accessible Data Data Forms

Nickname

**Under Exception**

Supplier Colour

**Enable this supplier to view other suppliers that are setup with them as their 'Supplied Via'**

Supplied Via Access

[Cancel](#) [Save](#)

**Supplier Deletion:**  
To delete this Supplier [Click Here](#). If you wish to simply unassociate an individual site from the Supplier you can do this via the 'Associated Sites' tab above.



## 5.2 ASSOCIATED SITES – WHAT THIS IS & HOW TO MANAGE.

The Associated Sites tab for the supplier, is where you can access the details of your supplier for the group or specific sites. You can amend the type, sub type etc here. And this is where you can request that a particular supplier supplies another site and setup that relationship.

### Step 1: Select **Supplier Manager** > Select **View** beside supplier

**Supplier Manager**

Supplier List | Supplier Attributes | Supplier Approval | Compliance | Contacts List | Supply Chain Map | Supplier Listing | Maps | Activity Overview | Admin

Default | Custom View 1

Site: Democo (Group) | Supplier Type: All | Status: All | Country: All | Search: Search... | Filter | Clear Filters

Supplier Sub Type: All | Supplied Via: All | Lead Technical: All | Compliant Level: All

Business Activity: All | Business Sub Activity: All | Under Exception: All

+ Add New | Detail Reports | Export to Excel | Summary Report | Bulk Update | Map View | Via Chain View | Attributes

Viewing 110 results. Page 1 of 3

Factory Code(s)	Company Name	Country	Supplier Type	Supplier Sub Type	Lead Technical	Under Exception	Supplied Via	Linked Customer	Status	Compliant	View
<input type="checkbox"/> US 323232	Abattoir 1	United States	Meat Processor	Beef, Lamb, Pork	Steve Jones				Approved	Compliant	<input type="button" value="View"/>
<input type="checkbox"/> 1234	ABC Laboratories	New Zealand	Laboratory						Delisted	N/A	<input type="button" value="View"/>
<input type="checkbox"/> NZ 347761	ABC Snacks Ltd	United Kingdom	Snacks	Biscuits & Cakes	Steve Jones				Approved	Compliant	<input type="button" value="View"/>
<input type="checkbox"/>	Acme Food Co	Eng & Wales (UK)	Poultry Farm	Free Range, Organic, Chicken	Steve Jones				In Progress	Requires Your Action	<input type="button" value="View"/>
<input type="checkbox"/> EC 343434	Acorn Produce	United Kingdom	Fruit 'Grower'	Apples, Pears	Steve Jones		Fruit e Frutta		Requires Review	Non-Compliant	<input type="button" value="View"/>
<input type="checkbox"/>	Agent	Australia	Agent / Broker		Tom Redden				Requires Review	Non-Compliant	<input type="button" value="View"/>

### Step 2: Now select the **Associated Sites** tab.

**Abattoir 1** | Return to Supplier Manager

Profile | **Associated Sites** | Supplier Data | Location | Compliance | Contacts | Notes | Accessible Data | Data Forms

+ Request Associated Site

Associated Site	Company Ref	Responsible Users	Supplier Contacts	Supplied Via	Compliance Rule Applied	Status	Request Info	
<input type="checkbox"/> Group		Commercial Tom Stanton (Lead) Technical Steve Jones (Lead)	Commercial User 1 Abattoir Technical User 1 Abattoir		Compliance Rule	Approved	<input type="button" value="Request Info"/>	<input type="button" value="View"/>
<input type="checkbox"/> Factory 4		Commercial Commercial (Lead) Technical Technical (Lead)	Commercial User 1 Abattoir Technical User 1 Abattoir		Compliance Rule	Approved	<input type="button" value="Request Info"/>	<input type="button" value="View"/>

## 5.2.1 REQUEST ASSOCIATED SITES – IF THE TAB IS ACTIVATED

If you have this activated on the Supplier Approval Admin point 1.4.4 you can only Request Associated Sites to be added.

**Step 1:** Now select the **Request Associated Sites** button.

Abattoir 1 <span>Return to Supplier Manager</span>									
Profile	Associated Sites	Supplier Data	Location	Compliance	Contacts	Notes	Accessible Data	Data Forms	
Request Associated Site									
<input type="checkbox"/>	Associated Site	Company Ref	Responsible Users	Supplier Contacts	Supplied Via	Compliance Rule Applied	Status		
<input type="checkbox"/>	Group		Commercial Tom Stanton (Lead) Technical Steve Jones (Lead)	Commercial User 1 Abattoir Technical User 1 Abattoir		Compliance Rule	Approved	Request Info	
<input type="checkbox"/>	Factory 4		Commercial Commercial (Lead) Technical Technical (Lead)	Commercial User 1 Abattoir Technical User 1 Abattoir		Compliance Rule	Approved	Request Info	

**Step 2:** Select your site, Category and comment if necessary. Then **Request Site**

Request Associated Site
×

*This will create a site request for this supplier - a company site approver will be notified of this request.*

The approver(s) set for this site / category are: Eric Knowles.

Site

Factory 3

Category:

Poultry Farm

Reason:

This supplier will now supply us

32 Characters, max 255 \*

Cancel

Request Site

**Step 3:** This request now goes to the requester setup to approve.

### 5.2.1.1 Approving or Declining Associated Site Requests – Approver

If you are an approver you will receive a task and email notification asking you to approve an associated site to link to a supplier

**Step 1:** Select the task and it will take you to the associated sites tab.

**Abattoir 1** [Return to Supplier Manager](#)

Profile **Associated Sites** Supplier Data Location Compliance Contacts Notes Accessible Data Data Forms

[Add Associated Site](#) [Request Associated Site](#)

<input type="checkbox"/>	Associated Site	Company Ref	Responsible Users	Supplier Contacts	Supplied Via	Compliance Rule Applied	Status		
<input type="checkbox"/>	Group		Commercial Tom Stanton (Lead) Technical Steve Jones (Lead)	Commercial User 1 Abattoir Technical User 1 Abattoir		Compliance Rule	Approved	<a href="#">Request Info</a>	<a href="#">✎</a>
<input type="checkbox"/>	Factory 4		Commercial Commercial (Lead) Technical Technical (Lead)	Commercial User 1 Abattoir Technical User 1 Abattoir		Compliance Rule	Approved	<a href="#">Request Info</a>	<a href="#">✎</a>

**Requested Associated Sites**

Below shows current outstanding associated site requests for US 323232 - Abattoir 1

[Accept Selected](#) [Decline Selected](#)

<input type="checkbox"/>	Date Requested	Site	Category	Reason	Requestor		
<input type="checkbox"/>	06/09/2022	Democo - Factory 3	Poultry Farm	This supplier will now supply us	Steve Jones	<a href="#">✎</a>	<a href="#">☰</a>

**Step 2:** Now, if you want to Approve this request select **Accept Selected** or if you want to decline select **Decline Selected**

**Abattoir 1** [Return to Supplier Manager](#)

Profile **Associated Sites** Supplier Data Location Compliance Contacts Notes Accessible Data Data Forms

[Add Associated Site](#) [Request Associated Site](#)

<input type="checkbox"/>	Associated Site	Company Ref	Responsible Users	Supplier Contacts	Supplied Via	Compliance Rule Applied	Status		
<input type="checkbox"/>	Group		Commercial Tom Stanton (Lead) Technical Steve Jones (Lead)	Commercial User 1 Abattoir Technical User 1 Abattoir		Compliance Rule	Approved	<a href="#">Request Info</a>	<a href="#">✎</a>
<input type="checkbox"/>	Factory 4		Commercial Commercial (Lead) Technical Technical (Lead)	Commercial User 1 Abattoir Technical User 1 Abattoir		Compliance Rule	Approved	<a href="#">Request Info</a>	<a href="#">✎</a>

**Requested Associated Sites**

Below shows current outstanding associated site requests for US 323232 - Abattoir 1

[Accept Selected](#) [Decline Selected](#)

<input type="checkbox"/>	Date Requested	Site	Category	Reason	Requestor		
<input type="checkbox"/>	06/09/2022	Democo - Factory 3	Poultry Farm	This supplier will now supply us	Steve Jones	<a href="#">✎</a>	<a href="#">☰</a>

**Step3:** Once accepted, the new site will now be linked to that supplier.

Abattoir 1 Return to Supplier Manager

Profile **Associated Sites** Supplier Data Location Compliance Contacts Notes Accessible Data Data Forms

Request Associated Site

<input type="checkbox"/>	Associated Site	Company Ref	Responsible Users	Supplier Contacts	Supplied Via	Compliance Rule Applied	Status		
<input type="checkbox"/>	Group		Commercial Tom Stanton (Lead) Technical Steve Jones (Lead)	Commercial User 1 Abattoir Technical User 1 Abattoir		Compliance Rule	Approved	Request Info	
<input type="checkbox"/>	Factory 3		Commercial Steve Jones (Lead) Technical Eric Knowles (Lead)	Commercial User 1 Abattoir Technical User 1 Abattoir		Supplier Approval	In Progress	Request Info	
<input type="checkbox"/>	Factory 4		Commercial Commercial (Lead) Technical Technical (Lead)	Commercial User 1 Abattoir Technical User 1 Abattoir		Compliance Rule	Approved	Request Info	

### 5.2.1.2 Add Associated Sites – If Request associated sites is deactivated

If you have the request associated sites deactivated on the Supplier Approval Admin point 1.4.4 you can Add the associated sites yourself. The blue tab below will be active for you.

#### Step 1: Select **Add Associated Site**

Abattoir 1 Return to Supplier Manager

Profile **Associated Sites** Supplier Data Location Compliance Contacts Notes Accessible Data Data Forms

**Add Associated Site**

<input type="checkbox"/>	Associated Site	Company Ref	Responsible Users	Supplier Contacts	Supplied Via	Compliance Rule Applied	Status		
<input type="checkbox"/>	Group		Commercial Tom Stanton (Lead) Technical Steve Jones (Lead)	Commercial User 1 Abattoir Technical User 1 Abattoir		Compliance Rule	Approved	Request Info	
<input type="checkbox"/>	Factory 3		Commercial Steve Jones (Lead) Technical Eric Knowles (Lead)	Commercial User 1 Abattoir Technical User 1 Abattoir		Supplier Approval	In Progress	Request Info	
<input type="checkbox"/>	Factory 4		Commercial Commercial (Lead) Technical Technical (Lead)	Commercial User 1 Abattoir Technical User 1 Abattoir		Compliance Rule	Approved	Request Info	

#### Step 2: Now select the site & select **Add**

Add Associated Site ×

Select Site

Cancel Add

**Step 3:** The new site of yours that this supplier supplies is now linked.

### 5.2.1.3 Update Associated Site - Amending/Updating Associated Sites info

This is where you update details for the supplier for each site that that supplier supplies. You can amend the type, sub type etc here. And this is where you can request that a particular supplier supplies another site and setup that relationship.

#### Step 1: Select Update Associated Site

Add Associated Site									
<input type="checkbox"/>	Associated Site	Company Ref	Responsible Users	Supplier Contacts	Supplied Via	Compliance Rule Applied	Status		
<input type="checkbox"/>	Group		Commercial Tom Stanton (Lead) Technical Steve Jones (Lead)	Commercial User 1 Abattoir Technical User 1 Abattoir		Compliance Rule	Approved	Request Info	<input type="checkbox"/>
<input type="checkbox"/>	Factory 3		Commercial Steve Jones (Lead) Technical Eric Knowles (Lead)	Commercial User 1 Abattoir Technical User 1 Abattoir		Supplier Approval	In Progress	Request Info	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Factory 4		Commercial Commercial (Lead) Technical Technical (Lead)	Commercial User 1 Abattoir Technical User 1 Abattoir		Compliance Rule	Approved	Request Info	<input type="checkbox"/>

#### Step 2: Select or set

**Relationship:** What way the supplier supplies you - Set

**Company Refs:** Any ref numbers that you may want to associate with this supplier

**Supplier Type:** Set supplier type

**Sub Type:** Set supplier sub type

**Status:** What status they are at with you

**Responsible Users:** Set who the commercial, tech & agri contact at your site is for that

**Supplied Via:** Select if the supplier is supplied via an agent

**Delist Associated Site:** Delist this supplier from your site

**Remove Associated Site:** Remove this supplier from your site

Abattoir 1 - Edit Associated Site
Return to Supplier Manager

Profile
Associated Sites
Supplier Data
Location
Compliance
Contacts
Notes
Accessible Data
Data Forms

Associated Site Setup

Associated Site: Factory 3

Relationship: ☒ Direct ☐ Indirect ☐ Both ☐ Not Set

Company Reference(s): 123467
Goods: Payment Ref (Goods)
Services: Payment Ref (Services)
Stock: Payment Ref (Stock)

Categorisation

Supplier Type: Poultry Farm

Supplier Sub Type:
☒ Duck
☐ Corn Fed
☐ Free Range
☐ Organic
☐ Chicken
☐ Conventional - Pork
☐ Livestock

☒ Manage Site Status

Status Approved

**Responsible Users**

Commercial/Technical Managers -- Select -- Commercial Contact Lead Contact - No Add / Update

Contact	Type	Lead Contact	
Steve Jones	Commercial	Yes	
Eric Knowles	Technical	Yes	

Supplier Commercial Contact User 1 Abattoir

Supplier Technical Contact User 1 Abattoir

Supplier Agri Contact -- Select --

**Supplied Via** Add Via

Via	Via Via	Categorisation	
Finished Goods Foods	---		

Cancel Save Associated Site

**Delist/Relist or Remove**

✕ Delist Associated Site 🗑 Remove Associated Site

#### 5.2.1.4 Supplied Via – What it is and setup

If you need to setup that a supplier is supplied via an agent you do this here. When you setup this relationship this then allows you to request documents, send questionnaires etc to the agent instead of the supplier. So it allows you to have a compliance rule still for that supplier even though info is coming through the agent.

#### Step 1: Select Add Via

Add Via

Via	Via Via	Categorisation	
Currently no via's set up...			

Cancel Save Associated Site

#### Step 2: Select Supplier/Agent. Then select Add Via when done

**Supplier Site Via** ✕

Type Single Via

Supplier Abattoir 1 (US 323232)

*Start typing to search your Supplier. Select Supplier from options returned.*

Under Exception -- Please Select --

Cancel + Add Via

**Step 3:** The relationship is now setup. You can add further Vias for this supplier if they are supplied via multiple agents.

Add Via		
Via	Via Via	Categorisation
Abattoir 1	---	

**Step 4:** To delete the via relationship select the red delete button.

Add Via		
Via	Via Via	Categorisation
Abattoir 1	---	

### 5.2.1.5 Delist Associated Site – How to delist

This is used to Delist the supplier for the particular site

**Step 1:** Select **Delist Associated Site**

Cancel Save Associated Site

Delist/Relist or Remove

✕ Delist Associated Site Remove Associated Site

**Step 2:** Add a comment, then select **Delist Associated Site**

Delist Associated Site ✕

Are you sure you want to delist Factory 3 as an associated site for Abattoir 1?

Comments \* Add comments

Cancel ✕ Delist Associated Site

**Step 3:** The site is now delisted from that supplier. The supplier will show on that sites supplier list but as a status **Delisted**

This is used to Remove the supplier for the particular site

### 5.2.1.6 Remove Associated Site – How to remove

### Step 1: Select Remove Associated Site

Cancel Save Associated Site

Delist/Relist or Remove

✕ Delist Associated Site Remove Associated Site

### Step 2: This validator box appears, select OK

demo.foodsconnected.com says

Warning: This will remove all document requests for this site.

Are you sure you would like to delete the selected site?

OK Cancel

### Step 3: Your site has now been removed from that supplier

## 5.3 SUPPLIER DATA – WHAT THIS IS

This is where you can see all the data between you and your supplier for each tool that you have subscribed too. It's a centralised location to view this data.

### Step 1: Select Supplier Manager > Select View beside supplier > Select Supplier Data

Abattoir 1 Return to Supplier Manager

Profile Associated Sites **Supplier Data** Location Compliance Contacts Notes Accessible Data Data Forms

**Supplier Audits**

Audit Date (From)	Auditor	Lead Technical Manager	Audit Type	Audit Score	Audit Status		
05/02/2021	Tim Audit	Steve Jones	Abattoir & Boning Room Audit	0 - Grade AA (APPROVED)	Completed	View	Edit
19/04/2021	Steve Jones	Steve Jones	Standard Audit	12 - Grade B (APPROVED)	Completed	View	Edit
26/11/2021	Steve Jones	Steve Jones	Standard Audit	10 - Grade A (APPROVED)	Completed	View	Edit
05/11/2020	Emma Williams	Steve Jones	Standard Audit	52 - Grade C (UNDER REVIEW)	Completed	View	Edit
22/03/2022	Steve Jones	Steve Jones	Standard Audit	21 - Grade B (APPROVED)	In Progress	View	Edit
07/03/2022	Kyle Anderson	Steve Jones	Generic Meat Audit	0 - Grade AA (APPROVED)	In Progress	View	Edit
07/04/2022	Steve Jones	Steve Jones	Standard Audit	40 - Grade B (APPROVED)	Completed	View	Edit

**Supplier Questionnaires**

**Supplier Documents**

**Product Checks**

**Traceability Checks**

**Supplier Checks**

**Specification Shares**

**Risk Assessments**

**Supplier Remote Audits**

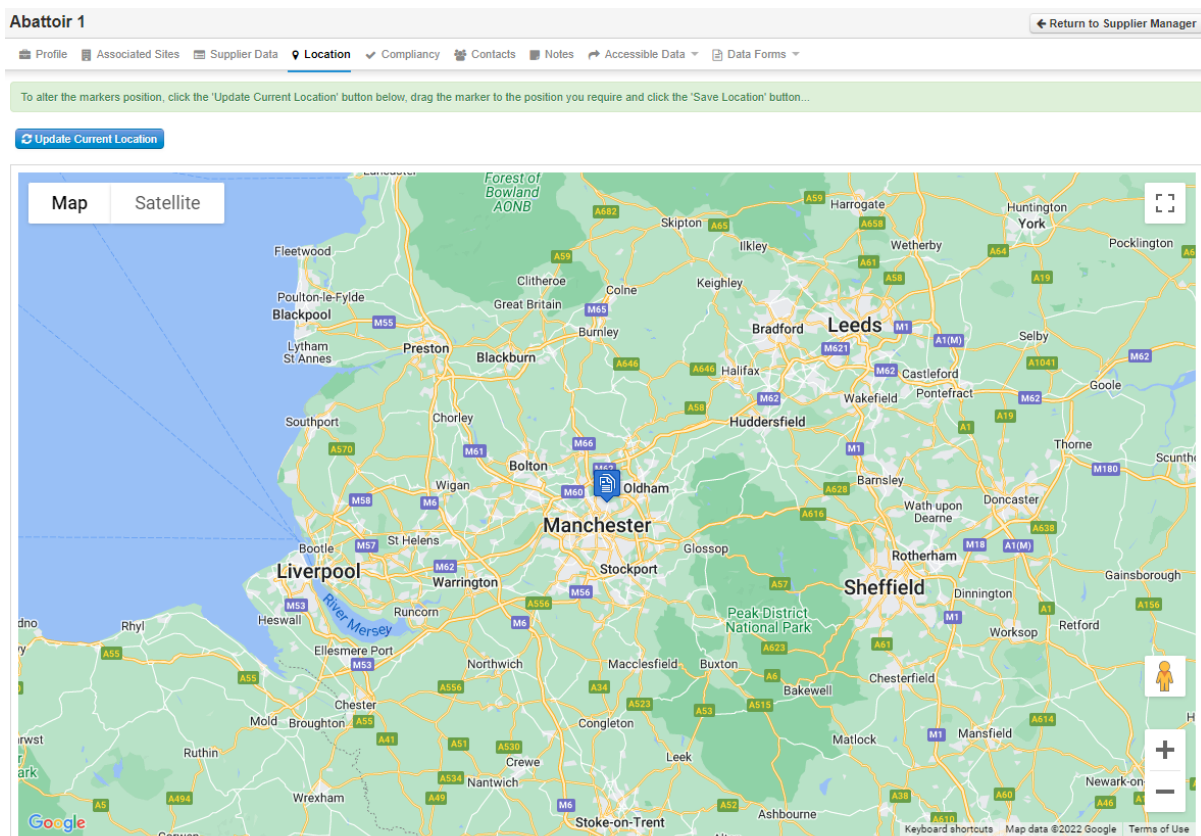


**Step 2:** Select the tool then select view if you want to deep dive on a record.

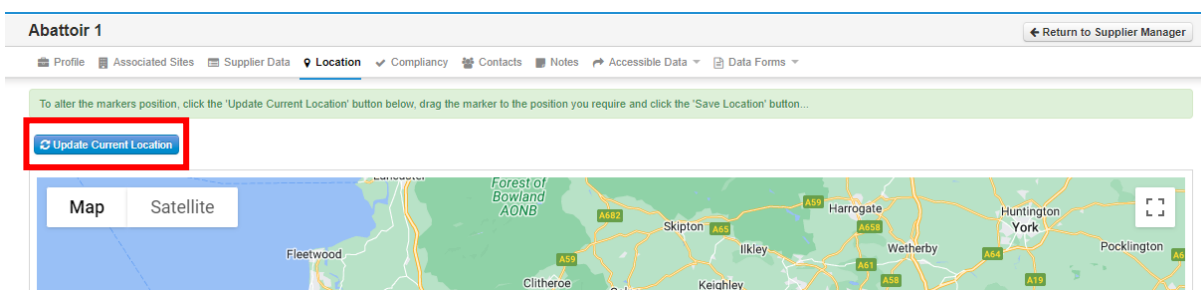
## 5.4 LOCATION – SET LOCATION OF THE SUPPLIER ON A MAP.

This is where you can set the location of your suppliers on a map.

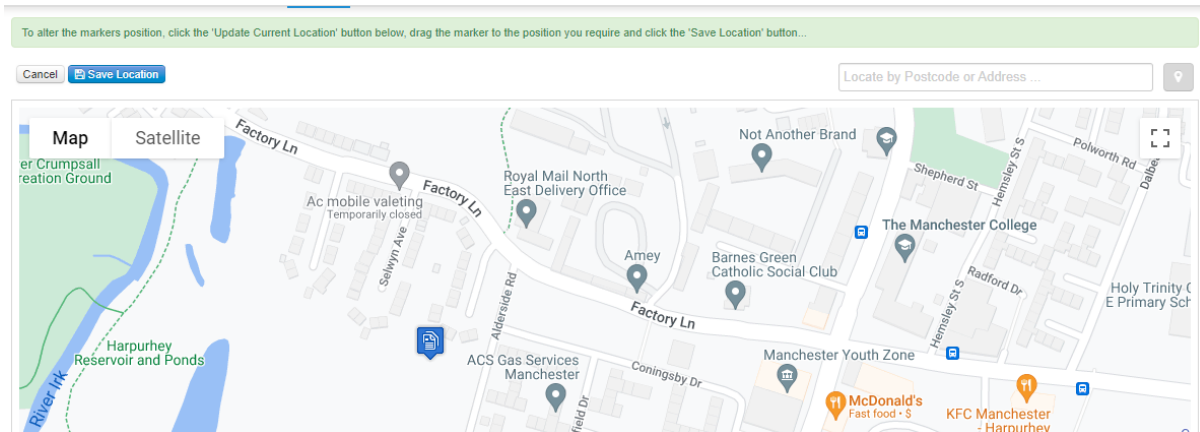
**Step 1:** Select **Supplier Manager** > Select **View** beside supplier > Select **Location**



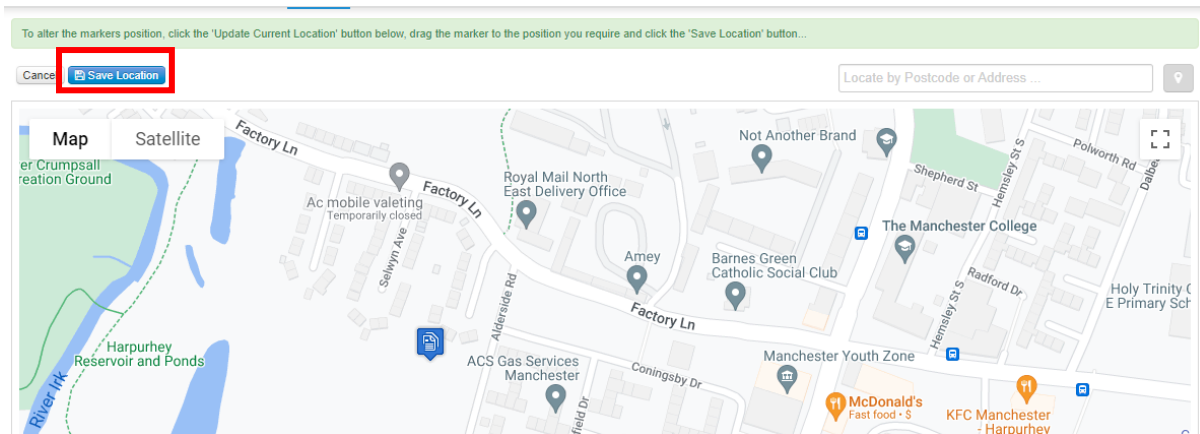
**Step 2:** To set, select **Update Current Location**



**Step 3:** If you are in the UK you can use postcode to locate the supplier. Zoom in to locate exact area, then move the pin to that location.



**Step 4:** Once located correctly select **Save Location**. The new position is now saved



**Step 5:** To amend location, follow the steps above.

## 5.5 COMPLIANCY – WHAT THIS IS

This is where you can see the compliance of your supplier for each site & the compliance for that supplier if you setup a Compliance Category. Suppliers compliance is updated every night but you can refresh the suppliers compliance manually here to reflect the latest.

**Step 1: Select Supplier Manager > Select View beside supplier > Select Compliance**

**Step 2: Select the site & category to see their compliance**

### 5.5.1 REFRESH COMPLIANCY

Suppliers compliance is updated every night but you can refresh the suppliers compliance manually here to reflect the latest.

**Step 1: Select Refresh Compliance**

**Step 2: Suppliers Compliance now updates**

## 5.6 CONTACTS

This is where you can see all the contacts for your supplier and contacts that are active on Foods Connected. You can also send a request to a new supplier contact to join Foods Connected.

**Step 1: Select Supplier Manager > Select View beside supplier > Select Contacts**

### 5.6.1 ADD NEW SUPPLIER CONTACT

You can add new supplier contacts to your suppliers record here. With this function you can also invite these contacts to Foods Connected and activate a profile so you can liaise with them through Foods Connected.

#### Step 1: Select Add Contact

Contacts						
Name	Email	Position	Telephone	Mobile	Request Contact	
John Brown	john@abattoir1.com	MD	05678321456	0456983456	<input checked="" type="checkbox"/>	<div>Add Contact</div> <div>Update </div>

#### Step 2: Select Other

Contact

☒ Supplier Contact
 ☐ Other

Select Contact
 

-- Select User --

Cancel

Save

**Step 3:** Fill in the details & make sure *Invite the contact to join Foods Connected* is ticked. When done select **Save**

Contact

☐ Supplier Contact
 ☒ Other

Forename

Surname

Position

Telephone

Mobile

Email

☒ Invite the contact to join Foods Connected

Cancel

Save

**Step 4:** This user will now get an invite email stating that you requested them to join Foods Connected. Once they login and activate their contact will sit in the active tab

## 5.7 NOTES

This is where you can create notes on your supplier

**Step 1: Select Supplier Manager > Select View beside supplier > Select Notes**

Abattoir 1

Return to Supplier Manager

Profile

Associated Sites

Supplier Data

Location

Compliance

Contacts

Notes

Accessible Data

Data Forms

Add Note

Date	By	Note	
11/10/2021	Steve Jones	Visited the site last week 4.1021 - Good reception - overall the site was clean tidy and well managed	<div></div>
07/06/2019	Steve Jones	Name of Requestor - Steve Jones. Reason for request - New supplier.	<div></div>

**Step 2: Select Add Note**

Abattoir 1

Return to Supplier Manager

Profile

Associated Sites

Supplier Data

Location

Compliance

Contacts

Notes

Accessible Data

Data Forms

Add Note

Date	By	Note	
11/10/2021	Steve Jones	Visited the site last week 4.1021 - Good reception - overall the site was clean tidy and well managed	<div></div>
07/06/2019	Steve Jones	Name of Requestor - Steve Jones. Reason for request - New supplier.	<div></div>

**Step 3: Add the details to your note and users. Select Save when done**

Add Note

Date: 06/09/2022

Attach File: Choose file No file chosen

Note: Add note here

Notify Users

Company Users

Search By Name...

Select / Unselect All

Group Teams

Agri Team

Commercial

Group H&S Team

HR

Maintenance

Night Shift

Responsible Users

Select / Unselect All

Technical

Commercial

Agri

Selected (39): Agri Team , Commercial , Group H&S Team , HR , Maintenance , Night Shift , Production Team , Quality , Technical , Kyle Anderson, Melissa Anderson, Paul Armstrong, Sean Baird, Ian Collins, Site Manager Delacroix, Steve Jones, Eric.

Cancel Save

**Step 4:** Your notes are now saved and will look like this below

Abattoir 1			<a href="#">Return to Supplier Manager</a>
<a href="#">Profile</a>	<a href="#">Associated Sites</a>	<a href="#">Supplier Data</a>	<a href="#">Location</a>
<a href="#">Compliance</a>	<a href="#">Contacts</a>	<a href="#">Notes</a>	<a href="#">Accessible Data</a>
<a href="#">Data Forms</a>			

Date	By	Note	
11/10/2021	Steve Jones	Visited the site last week 4.1021 - Good reception - overall the site was clean tidy and well managed	
07/06/2019	Steve Jones	Name of Requestor - Steve Jones. Reason for request - New supplier.	

## 5.8 ACCESSIBLE DATA – WHAT THIS IS & HOW TO USE IT.

Accessible data tab is where you grant access to your suppliers to use your templates, products etc to complete in your format. For instance, you share your External Specification Template & products with your supplier for them to build a spec.

**Step 1:** Select **Supplier Manager** > Select **View** beside supplier > Select **Accessible Data**

Abattoir 1			<a href="#">Return to Supplier Manager</a>
<a href="#">Profile</a>	<a href="#">Associated Sites</a>	<a href="#">Supplier Data</a>	<a href="#">Location</a>
<a href="#">Compliance</a>	<a href="#">Contacts</a>	<a href="#">Notes</a>	<a href="#">Accessible Data</a>
<a href="#">Data Forms</a>			

Company profile last updated on the: 22/07/2022.		<ul style="list-style-type: none"> <li>Specifications</li> <li>Products</li> <li>Supplier Types and Business Activities</li> <li>Product Checks</li> <li>Company Stock</li> <li>Questionnaires</li> <li>Audits</li> <li>Remote Audit Templates</li> </ul>	
Linked FC Company	Abattoir 1		
Factory Code	US 323232		
Telephone	123456789101		
Email	info@abattoir.com		
Website	www.abattoir.com		
Address	123 Demo Street, Demo City, Iowa, IO1234, United States		
Country	United States		

### 5.8.1 SPECIFICATIONS – HOW TO SHARE SPEC TEMPLATES WITH YOUR SUPPLIER

**Step 1:** Select **Accessible Data** then **Specifications**

Abattoir 1			<a href="#">Return to Supplier Manager</a>
<a href="#">Profile</a>	<a href="#">Associated Sites</a>	<a href="#">Supplier Data</a>	<a href="#">Location</a>
<a href="#">Compliance</a>	<a href="#">Contacts</a>	<a href="#">Notes</a>	<a href="#">Accessible Data</a>
<a href="#">Data Forms</a>			

Company profile last updated on the: 22/07/2022.		<ul style="list-style-type: none"> <li>Specifications</li> <li>Products</li> <li>Supplier Types and Business Activities</li> <li>Product Checks</li> <li>Company Stock</li> <li>Questionnaires</li> <li>Audits</li> <li>Remote Audit Templates</li> </ul>	
Linked FC Company	Abattoir 1		
Factory Code	US 323232		
Telephone	123456789101		
Email	info@abattoir.com		
Website	www.abattoir.com		
Address	123 Demo Street, Demo City, Iowa, IO1234, United States		

## Step 2: Select Add Template

**Abattoir 1** [Return to Supplier Manager](#)

Profile Associated Sites Supplier Data Location Compliance Contacts Notes **Accessible Data** Data Forms

**Specification Templates**

Select which specification templates you would like to grant access to for this supplier. This will allow them to build specifications using the shared template.

[Add Template](#) [Delete Selected Shares](#)

<input type="checkbox"/>	Share Date	Share By	Shared With	Template Name	Site	Allow Sharing	Specs	
<input type="checkbox"/>	01/11/2019 14:32:02	Steve Jones	-	Meat Product Spec Template	Group	No	0	<a href="#">Edit</a>
<input type="checkbox"/>	21/06/2021 15:24:52	Steve Jones	User 1 Abattoir	Complex Spec Template	Group	No	0	<a href="#">Edit</a>

**Step 3:** Select the site you are sharing from, select the template, select a user to notify on the suppliers side & include a message. Once done select **Share**

**Share Specification Template** ×

Select Site

Specification Template

Notify User

☒ User 1 Abattoir

Allow Forward Sharing?

Include Message (optional)

**Step 4:** Your shared templates will look like this below

**Abattoir 1** [Return to Supplier Manager](#)

Profile Associated Sites Supplier Data Location Compliance Contacts Notes **Accessible Data** Data Forms

**Specification Templates**

Select which specification templates you would like to grant access to for this supplier. This will allow them to build specifications using the shared template.

[Add Template](#) [Delete Selected Shares](#)

<input type="checkbox"/>	Share Date	Share By	Shared With	Template Name	Site	Allow Sharing	Specs	
<input type="checkbox"/>	01/11/2019 14:32:02	Steve Jones	-	Meat Product Spec Template	Group	No	0	<a href="#">Edit</a>
<input type="checkbox"/>	21/06/2021 15:24:52	Steve Jones	User 1 Abattoir	Complex Spec Template	Group	No	0	<a href="#">Edit</a>

### 5.8.1.1 Delete Shared Specification Template

**Step 1:** At any stage if you want to delete a shared spec template with a supplier, simply select the template then select **Delete Selected Shares**.

Specification Templates

Select which specification templates you would like to grant access to for this supplier. This will allow them to build specifications using the shared template.

**Add Template** **Delete Selected Shares**

<input type="checkbox"/>	Share Date	Share By	Shared With	Template Name	Site	Allow Sharing	Specs	
<input checked="" type="checkbox"/>	01/11/2019 14:32:02	Steve Jones	-	Meat Product Spec Template	Group	No	0	
<input type="checkbox"/>	21/06/2021 15:24:52	Steve Jones	User 1 Abattoir	Complex Spec Template	Group	No	0	

### 5.8.1.2 Edit Shared Specification Template

**Step 1:** At any stage if you want to edit the details of the template share and suppliers' access to that template select the edit button beside the template.

Specification Templates

Select which specification templates you would like to grant access to for this supplier. This will allow them to build specifications using the shared template.

**Add Template** **Delete Selected Shares**

<input type="checkbox"/>	Share Date	Share By	Shared With	Template Name	Site	Allow Sharing	Specs	
<input checked="" type="checkbox"/>	01/11/2019 14:32:02	Steve Jones	-	Meat Product Spec Template	Group	No	0	
<input type="checkbox"/>	21/06/2021 15:24:52	Steve Jones	User 1 Abattoir	Complex Spec Template	Group	No	0	

**Step 2:** Amend the details and select Share when done

Share Specification Template ×

Select Site

Specification Template

Notify User

☒ User 1 Abattoir

Allow Forward Sharing?

Include Message (optional)



## 5.8.2 PRODUCTS – HOW TO SHARE

### Step 1: Select Accessible Data then Products

Abattoir 1 Return to Supplier Manager

Profile Associated Sites Supplier Data Location Compliance Contacts Notes Accessible Data Data Forms

Company profile last updated on the: 22/07/2022.

Linked FC Company Abattoir 1


Factory Code US 323232

Telephone 123456789101

Email info@abattoir.com

Website www.abattoir.com

Specifications  
**Products**  
 Supplier Types and Business Activities  
 Product Checks  
 Company Stock  
 Questionnaires  
 Audits  
 Remote Audit Templates



### Step 2: Select Add Products

Abattoir 1 Return to Supplier Manager


Profile Associated Sites Supplier Data Location Compliance Contacts Notes Accessible Data Data Forms

Products

Select which product details you would like to grant access to for this supplier.

**Add Product(s)** Delete Selected Shares

Search Product Names Q X

<input type="checkbox"/>	Share Type	Shared With Users	Name	Reason	Shared On	Expires On	
<input type="checkbox"/>	Individual Product	-	1023 - Fat	Build External Specification			

**Step 3: Now select individual products to share on an individual product basis with your suppliers. (You can share by product brand, type & category as well but this would be bulk). Then on Product Type select the Product Type**

Share Products X

**Individual Products** Product Brands Product Types Product Categories

i To retrieve a list of individual products, please begin by selecting a product type. X

Product Type: **- Select -**

**- Select -**

- Animal Feed
- Fats
- Minerals
- Other
- Rape
- Soya
- Clothing
- Fabric
- Cold Storage Services
- Pallet Spaces
- Drinks
- Fizzy & Soft Drinks
- Electrical
- Computer Accessories
- Kitchen Appliances
- Entertainment
- Toys
- Hardware
- Tools

Build External Specification

Build External Specification

Build External Specification

Build External Specification

Build External Specification

Build External Specification

Build External Specification

Build External Specification

Build External Specification

Cancel Next

**Step 4:** Once you select a Type the products and codes will appear. Select your products you want to share with your supplier. Select **Next** when done

Share Products

Individual Products
Product Brands
Product Types
Product Categories

Product Type: Casings
Search...

	Site	Product Type	Product	3 Selected
<input checked="" type="checkbox"/>	Group	Casings	1000123 - Plant based burger	
<input checked="" type="checkbox"/>	Group	Casings	CG001 - 50g Feta	
<input checked="" type="checkbox"/>	Group	Casings	CG002 - 50g baby spinach leaves	
<input type="checkbox"/>	Group	Casings	CG1002 - Parsley	
<input type="checkbox"/>	Group	Casings	CG1005 - 2 Chicken-Style Stock Cubes	

Cancel
Next

**Step 5:** Select a person to notify and the reason for sharing. Add a required by date & expires on date if needed. Select **Share** when done.

Share Products - Notify User

Notify User
☒ User 1 Abattoir

Reason for Sharing
Build External Specification
Build External Specification
Use In Order Manager
Use In Production Manager

Required By (Optional)

Expires On (Optional)

Include Message (Optional)
Message

Cancel
Share

**Step 6:** Your shared products will look like this below.

Abattoir 1
Return to Supplier Manager

Profile
Associated Sites
Supplier Data
Location
Compliance
Contacts
Notes
Accessible Data
Data Forms

Selected items have been successfully shared

Products
Select which product details you would like to grant access to for this supplier.

Add Product(s)
Delete Selected Shares
Search Product Names

	Share Type	Shared With Users	Name	Reason	Shared On	Expires On	
<input type="checkbox"/>	Individual Product	User 1 Abattoir	1000123 - Plant based burger	Build External Specification	20/09/2022		<input checked="" type="checkbox"/>
<input type="checkbox"/>	Individual Product	-	1023 - Fat	Build External Specification			<input checked="" type="checkbox"/>

### 5.8.2.1 How to delete a shared product

#### Step 1: Navigate to your Accessible data tab for that supplier. Select **Products**

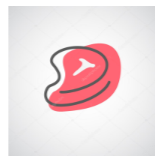
**Abattoir 1** [Return to Supplier Manager](#)

Profile Associated Sites Supplier Data Location Compliance Contacts Notes **Accessible Data** Data Forms

Company profile last updated on the: 22/07/2022.

Linked FC Company	Abattoir 1
Factory Code	US 323232
Telephone	123456789101
Email	info@abattoir.com
Website	www.abattoir.com

- Specifications
- Products**
- Supplier Types and Business Activities
- Product Checks
- Company Stock
- Questionnaires
- Audits
- Remote Audit Templates



#### Step 2: Select product shares you want to delete. Then select Delete Selected Shares

**Abattoir 1** [Return to Supplier Manager](#)

Profile Associated Sites Supplier Data Location Compliance Contacts Notes **Accessible Data** Data Forms

Selected items have been successfully shared

**Products**

Select which product details you would like to grant access to for this supplier.

[Add Product\(s\)](#) [Delete Selected Shares](#)

<input type="checkbox"/>	Share Type	Shared With Users	Name	Reason	Shared On	Expires On	
<input checked="" type="checkbox"/>	Individual Product	User 1 Abattoir	1000123 - Plant based burger	Build External Specification	20/09/2022		<input type="button" value="Q"/>
<input checked="" type="checkbox"/>	Individual Product	-	1023 - Fat	Build External Specification			<input type="button" value="Q"/>
<input checked="" type="checkbox"/>	Individual Product	-	1023 - Fat	Build External Specification			<input type="button" value="Q"/>
<input type="checkbox"/>	Individual Product	-	1024 - Salmon Roll	Build External Specification			<input type="button" value="Q"/>
<input type="checkbox"/>	Individual Product	-	1024 - Salmon Roll	Build External Specification			<input type="button" value="Q"/>

#### Step 3: The product shares are now deleted and will be deleted at the suppliers end.

### 5.8.2.2 How to edit a shared product share

#### Step 1: Navigate to your Accessible data tab for that supplier. Select **Products**

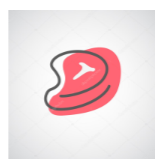
**Abattoir 1** [Return to Supplier Manager](#)

Profile Associated Sites Supplier Data Location Compliance Contacts Notes **Accessible Data** Data Forms

Company profile last updated on the: 22/07/2022.

Linked FC Company	Abattoir 1
Factory Code	US 323232
Telephone	123456789101
Email	info@abattoir.com
Website	www.abattoir.com

- Specifications
- Products**
- Supplier Types and Business Activities
- Product Checks
- Company Stock
- Questionnaires
- Audits
- Remote Audit Templates



**Step 2:** Select edit beside the products you want to edit.

**Abattoir 1** [Return to Supplier Manager](#)

Profile Associated Sites Supplier Data Location Compliance Contacts Notes **Accessible Data** Data Forms

Selected items have been successfully shared

**Products**

Select which product details you would like to grant access for this supplier.

[Add Product\(s\)](#) [Delete Selected Shares](#)

<input type="checkbox"/>	Share Type	Shared With Users	Name	Reason	Shared On	Expires On	
<input checked="" type="checkbox"/>	Individual Product	User 1 Abattoir	1000123 - Plant based burger	Build External Specification	20/09/2022		<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Individual Product	-	1023 - Fat	Build External Specification			<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Individual Product	-	1023 - Fat	Build External Specification			<input checked="" type="checkbox"/>
<input type="checkbox"/>	Individual Product	-	1024 - Salmon Roll	Build External Specification			<input type="checkbox"/>
<input type="checkbox"/>	Individual Product	-	1024 - Salmon Roll	Build External Specification			<input type="checkbox"/>

**Step 3:** Edit the share details. Select **Update Users** when done

**Share Products - Notify User**

Notify User ☐ User 1 Abattoir

Reason for Sharing

Required By (Optional)

Include Message (Optional)

### 5.8.3 HOW TO SHARE SUPPLIER TYPES & BUSINESS ACTIVITIES

**Step 1:** Navigate to your **Accessible Data** tab for that supplier. Then select **Supplier Types & Business Activities**

**Abattoir 1** [Return to Supplier Manager](#)

Profile Associated Sites Supplier Data Location Compliance Contacts Notes **Accessible Data** Data Forms

**Supplier Types and Business Activities**

Select which supplier types / business activities you would like this supplier to be able to access for use in their supply chain

[Add Share](#) [Delete Selected Shares](#)

<input type="checkbox"/>	Site	Supplier Type	Supplier Sub Type	Business Activity	Last Reviewed
Currently no supplier types / business activities made accessible for this supplier...					

- Specifications
- Products
- Supplier Types and Business Activities**
- Product Checks
- Company Stock
- Questionnaires
- Audits
- Remote Audit Templates

## Step 2: Select Add Share

Abattoir 1 Return to Supplier Manager

Profile Associated Sites Supplier Data Location Compliance Contacts Notes Accessible Data Data Forms

Supplier Types and Business Activities

Select which supplier types / business activities you would like this supplier to be able to access for use in their supplier types / business activities

**Add Share** Delete Selected Shares

Site	Supplier Type	Supplier Sub Type	Business Activity	Last Reviewed
Currently no supplier types / business activities made accessible for this supplier...				

Specifications  
Products  
**Supplier Types and Business Activities**  
Product Checks  
Company Stock  
Questionnaires  
Audits  
Remote Audit Templates

Search...

**Step 3:** Select details you want to share from the dropdowns etc. Select person to notify. When done select **Share**

Share Supplier Types

Company Site: Democo (Group)

Supplier Type: Abattoirs

Sub Supplier Type: Beef

Business Activity: Cattle

Notify User: Search...

☐ -- Group Users --

☒ User 1 Abattoir

Cancel **Share**

### 5.8.3.1 How to delete a shared Supplier Types & Business Activities

**Step 1:** Navigate to your **Accessible Data** tab for that supplier. Then select **Supplier Types & Business Activities**

Abattoir 1 Return to Supplier Manager

Profile Associated Sites Supplier Data Location Compliance Contacts Notes Accessible Data Data Forms

Supplier Types and Business Activities

Select which supplier types / business activities you would like this supplier to be able to access for use in their supplier types / business activities

**Add Share** Delete Selected Shares

Site	Supplier Type	Supplier Sub Type	Business Activity	Last Reviewed
Currently no supplier types / business activities made accessible for this supplier...				

Specifications  
Products  
**Supplier Types and Business Activities**  
Product Checks  
Company Stock  
Questionnaires  
Audits  
Remote Audit Templates

Search...

## Step 2: Select Shares then select Delete Selected Shares

**Abattoir 1** [Return to Supplier Manager](#)

Profile Associated Sites Supplier Data Location Compliance Contacts Notes Accessible Data Data Forms Supply Chain Map

Selected items have been successfully shared

**Supplier Types and Business Activities**

Select which supplier types / business activities you would like this supplier to be able to access for use in their supplier file.

[Add Share](#) [Delete Selected Shares](#)

<input checked="" type="checkbox"/>	Site	Supplier Type	Supplier Sub Type	Business Activity	Business Sub Activity	Last Reviewed
<input checked="" type="checkbox"/>	Group	Abattoirs	Beef	Cattle	---	---

### 5.8.4 HOW TO SHARE PRODUCT CHECK TEMPLATES

## Step 1: Navigate to your Accessible Data tab for that supplier. Then select Product Checks

**Abattoir 1** [Return to Supplier Manager](#)

Profile Associated Sites Supplier Data Location Compliance Contacts Notes Accessible Data Data Forms Supply Chain Map

Company profile last updated on the: 22/07/2022

Linked FC Company Abattoir 1

Factory Code US 323232

Telephone 123456789101

Email info@abattoir.com

Website www.abattoir.com

Address 123 Demo Street, Demo City, Iowa, IO1234, United States

Country United States

Specifications  
Products  
Supplier Types and Business Activities  
**Product Checks**  
Company Stock  
Questionnaires  
Audits  
Remote Audit Templates

## Step 2: Now select Add Template.

**Abattoir 1** [Return to Supplier Manager](#)

Profile Associated Sites Supplier Data Location Compliance Contacts Notes Accessible Data Data Forms Supply Chain Map

**Product Check Templates**

Select which product check templates you would like to grant access to for this supplier. This will allow them to complete product checks using the shared template.

[Add Template](#) [Delete Selected Shares](#)

<input type="checkbox"/>	Share Date	Share By	Template Name	Site
Currently no product check templates made accessible for this supplier...				

**Step 3:** Now select your details and the template you want to share. Select **Share** when done

Share Product Check Template

Select Site

Democo (Group)

Product Check Template

Intake Non Conformance Report (

Notify User

Search...

☒ User 1 Abattoir

Include Message (optional)

Enter a message... (Optional)

Cancel

Share

#### 5.8.4.1 How to Delete Product Check Template Shares

**Step 1:** Navigate to your **Accessible Data** tab for that supplier. Then select **Product Checks**

Abattoir 1
Return to Supplier Manager

Profile
Associated Sites
Supplier Data
Location
Compliance
Contacts
Notes
Accessible Data
Data Forms
Supply Chain Map

Company profile last updated on the: 22/07/2022.

Linked FC Company
Abattoir 1

Factory Code
US 323232

Telephone
123456789101

Email
info@abattoir.com

Website
www.abattoir.com

Address
123 Demo Street, Demo City, Iowa, IO1234, United States

Country
United States

Specifications
Products
Supplier Types and Business Activities
Product Checks
Company Stock
Questionnaires
Audits
Remote Audit Templates

**Step 2:** Select the shares you want to delete, then select **Delete Selected Shares**

Abattoir 1
Return to Supplier Manager

Profile
Associated Sites
Supplier Data
Location
Compliance
Contacts
Notes
Accessible Data
Data Forms
Supply Chain Map

Selected items have been successfully shared

Product Check Templates

Select which product check templates you would like to grant access to for this supplier. This will allow them to complete product checks using the shared template.

Add Template
Delete Selected Shares
 Search...

<input type="checkbox"/>	Share Date	Share By	Template Name	Site
<input checked="" type="checkbox"/>	21/09/2022 08:42:31	Steve Jones	Intake Non Conformance Report (DR, NS)	Group

## 5.8.5 HOW TO SHARE COMPANY STOCK

**Step 1:** Navigate to your **Accessible Data** tab for that supplier. Then select **Company Stock**.


Abattoir 1 Return to Supplier Manager

Profile Associated Sites Supplier Data Location Compliance Contacts Notes Accessible Data Data Forms Supply Chain Map

Company profile last updated on the: 22/07/2022.

Linked FC Company	Abattoir 1
Factory Code	US 323232
Telephone	123456789101
Email	info@abattoir.com
Website	www.abattoir.com
Address	123 Demo Street, Demo City, Iowa, IO1234, United States

- Specifications
- Products
- Supplier Types and Business Activities
- Product Checks
- Company Stock**
- Questionnaires
- Audits
- Remote Audit Templates



**Step 2:** Now select **Add Stock Access**

Abattoir 1 Return to Supplier Manager

Profile Associated Sites Supplier Data Location Compliance Contacts Notes Accessible Data Data Forms Supply Chain Map

Company Stock

Gives this supplier access to your company stock

**Add Stock Access** Delete Selected All

Search...

User	Site	Supplier
<input type="checkbox"/> User 1 Abattoir	Democo - Factory 1	None

**Step 3:** Now select the details, select a user to notify. When done select **Grant View Access**

Grant Stock Access

Notify User User 1 Abattoir

Site(s) Democo (Group)

Supplier None

Notify Users Search...

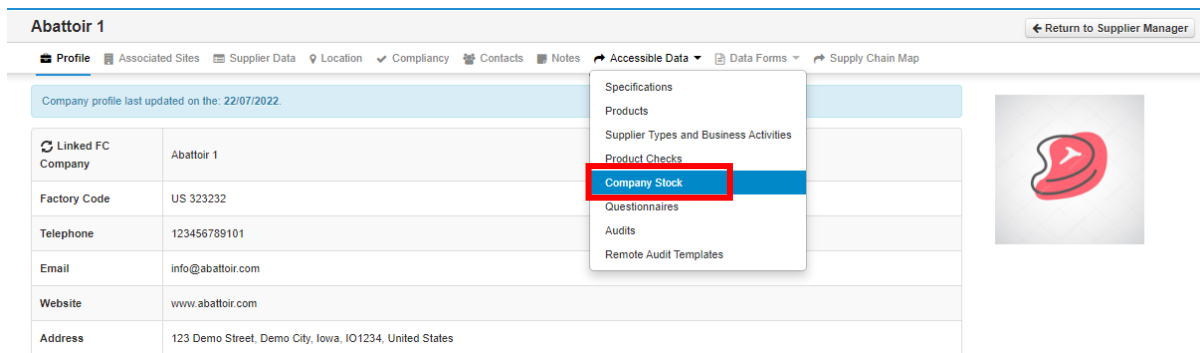
☒ User 1 Abattoir

Cancel **Grant View Access**



### 5.8.5.1 How to delete company stock shares

**Step 1:** Navigate to your **Accessible Data** tab for that supplier. Then select **Company Stock**.



Abattoir 1

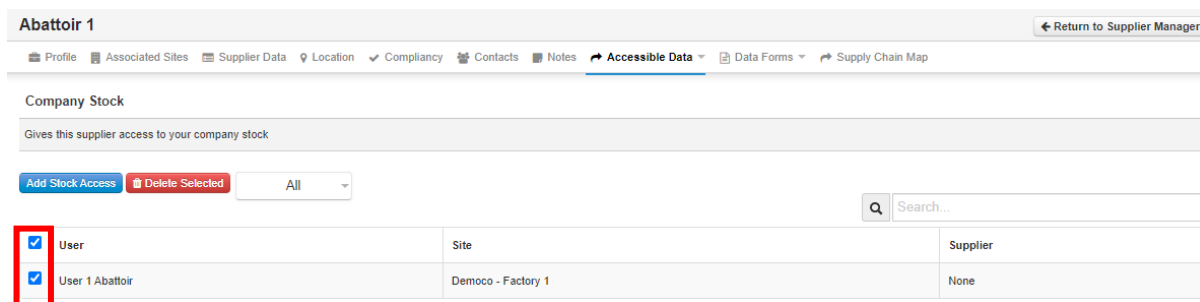
Profile Associated Sites Supplier Data Location Compliance Contacts Notes Accessible Data Data Forms Supply Chain Map

Company profile last updated on the: 22/07/2022.

Linked FC Company	Abattoir 1
Factory Code	US 323232
Telephone	123456789101
Email	info@abattoir.com
Website	www.abattoir.com
Address	123 Demo Street, Demo City, Iowa, IO1234, United States

- Specifications
- Products
- Supplier Types and Business Activities
- Product Checks
- Company Stock**
- Questionnaires
- Audits
- Remote Audit Templates

**Step 2:** Select **Stock Shares**, then select **Delete Selected**



Abattoir 1

Profile Associated Sites Supplier Data Location Compliance Contacts Notes Accessible Data Data Forms Supply Chain Map

Company Stock

Gives this supplier access to your company stock

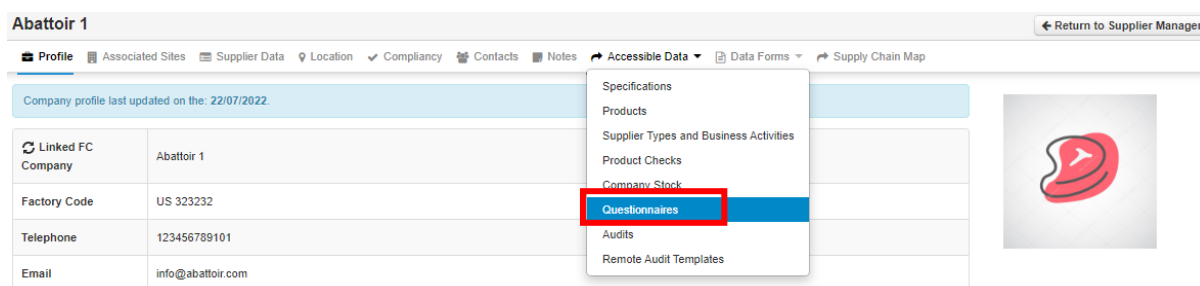
[Add Stock Access](#) [Delete Selected](#) All

Search...

	User	Site	Supplier
<input checked="" type="checkbox"/>	User		
<input checked="" type="checkbox"/>	User 1 Abattoir	Democo - Factory 1	None

### 5.8.6 HOW TO SHARE QUESTIONNAIRES

**Step 1:** Navigate to your **Accessible Data** tab for that supplier. Then select **Questionnaires**



Abattoir 1

Profile Associated Sites Supplier Data Location Compliance Contacts Notes Accessible Data Data Forms Supply Chain Map

Company profile last updated on the: 22/07/2022.

Linked FC Company	Abattoir 1
Factory Code	US 323232
Telephone	123456789101
Email	info@abattoir.com

- Specifications
- Products
- Supplier Types and Business Activities
- Product Checks
- Company Stock
- Questionnaires**
- Audits
- Remote Audit Templates

## Step 2: Now select **Add Template**

**Abattoir 1** Return to Supplier Manager

Profile Associated Sites Supplier Data Location Compliance Contacts Notes Accessible Data Data Forms Supply Chain Map

**Questionnaire Templates**

Select which questionnaire templates you would like to grant access to for this supplier. This will allow them to send questionnaires using the shared template.

**Add Template** Delete Selected Shares

<input type="checkbox"/>	Share Date	Share By	Template Name	Site	Supplier Visibility	Custom Share Group
Currently no questionnaire templates made accessible for this supplier...						

## Step 3: Now select the template and the details of the share. Select **Share** when done

**Share Questionnaire Template** ×

Select Site

Questionnaire Template

Supplier Visibility ☒ All Suppliers ☐ Vias Only ☐ Custom Share Group

Approver Company ☒ Default ☐ Democo ☐ Abattoir 1

Notify User ☒ User 1 Abattoir

Include Message (optional)

### 5.8.6.1 How to delete shared questionnaires

## Step 1: Navigate to your **Accessible Data** tab for that supplier. Then select **Questionnaires**

**Abattoir 1** Return to Supplier Manager

Profile Associated Sites Supplier Data Location Compliance Contacts Notes Accessible Data Data Forms Supply Chain Map

Company profile last updated on the: 22/07/2022.

Linked FC Company	Abattoir 1
Factory Code	US 323232
Telephone	123456789101
Email	info@abattoir.com

- Specifications
- Products
- Supplier Types and Business Activities
- Product Checks
- Company Stock
- Questionnaires**
- Audits
- Remote Audit Templates

## Step 2: Select shared Questionnaires. When done select **Delete Selected Shares**

**Abattoir 1** [Return to Supplier Manager](#)

Profile Associated Sites Supplier Data Location Compliance Contacts Notes **Accessible Data** Data Forms Supply Chain Map

### Questionnaire Templates

Select which questionnaire templates you would like to grant access to for this supplier. This will allow them to send questionnaires using the shared template.

[Add Template](#) [Delete Selected Shares](#)

Search...

<input checked="" type="checkbox"/>	Share Date	Share By	Template Name	Site	Supplier Visibility	Custom Share Group
<input checked="" type="checkbox"/>	21/09/2022 09:08:02	Steve Jones	Animal Outcome Measures	Group	All Suppliers	---

## 5.8.7 HOW TO SHARE AUDITS

### Step 1: Navigate to your **Accessible Data** tab for that supplier. Then select **Audits**

**Abattoir 1** [Return to Supplier Manager](#)

Profile Associated Sites Supplier Data Location Compliance Contacts Notes **Accessible Data** Data Forms Supply Chain Map

### Audit Type Templates

Select which Audit Type templates you would like to grant access to for this supplier. This will allow them to complete Audits using the shared template.

[Add Template](#) [Delete Selected Shares](#)

Search...

<input type="checkbox"/>	Share Date	Share By	Current Template Name	Site	Supplier Visibility	Custom Share Group
Currently no Audit templates have been made accessible to this supplier...						

- Specifications
- Products
- Supplier Types and Business Activities
- Product Checks
- Company Stock
- Questionnaires
- Audits**
- Remote Audit Templates

### Step 2: Select **Add Template**.

**Abattoir 1** [Return to Supplier Manager](#)

Profile Associated Sites Supplier Data Location Compliance Contacts Notes **Accessible Data** Data Forms Supply Chain Map

### Audit Type Templates

Select which Audit Type templates you would like to grant access to for this supplier. This will allow them to complete Audits using the shared template.

[Add Template](#) [Delete Selected Shares](#)

Search...

<input type="checkbox"/>	Share Date	Share By	Current Template Name	Site	Supplier Visibility	Custom Share Group
Currently no Audit templates have been made accessible to this supplier...						

### Step 3: Now select the template and the details of the share. Select **Share** when done

**Share Audit Type Template** [X](#)

Select Site:

Audit Type Template:

Supplier Visibility: ☒ All Suppliers ☐ Vias Only ☐ Custom Share Group

Notify User: ☒ User 1 Abattoir

Include Message (optional):

[Cancel](#) [Share](#)

### 5.8.7.1 How to delete Audit shares

**Step 1:** Navigate to your **Accessible Data** tab for that supplier. Then select **Audits**

The screenshot shows the 'Abattoir 1' supplier page. The 'Accessible Data' tab is selected, and a dropdown menu is open, highlighting the 'Audits' option. The page includes a 'Return to Supplier Manager' button and a search bar.

**Step 2:** Select the audit shared that you want to delete then select **Delete Selected Shares**

The screenshot shows the 'Abattoir 1' supplier page. The 'Accessible Data' tab is selected, and the 'Delete Selected Shares' button is highlighted. The page includes a 'Return to Supplier Manager' button and a search bar.

### 5.8.8 HOW TO SHARE REMOTE AUDIT TEMPLATES

**Step 1:** Navigate to your **Accessible Data** tab for that supplier. Then select **Remote Audit Templates**

The screenshot shows the 'Abattoir 1' supplier page. The 'Accessible Data' tab is selected, and a dropdown menu is open, highlighting the 'Remote Audit Templates' option. The page includes a 'Return to Supplier Manager' button and a search bar.

**Step 2:** Select **Add Template**.

The screenshot shows the 'Abattoir 1' supplier page. The 'Accessible Data' tab is selected, and the 'Add Template' button is highlighted. The page includes a 'Return to Supplier Manager' button and a search bar.

**Step 3:** Now select the template and the details of the share. Select **Share** when done

Remote Audit Template

Select Site: Democo (Group)

Remote Audit Template: Animal Welfare Standard

Supplier Visibility: ☒ All Suppliers ☐ Vias Only ☐ Share Groups

Notify User: ☒ User 1 Abattoir

Include Message (optional): Enter a message... (Optional)

Cancel Share

### 5.8.8.1 How to delete Remote Audit shares

**Step 1:** Navigate to your **Accessible Data** tab for that supplier. Then select **Remote Audit Templates**

Abattoir 1

Profile Associated Sites Supplier Data Location Compliance Contacts Notes Accessible Data Data Forms Supply Chain Map

Remote Audit Templates

Select which Remote Audit Template you would like to grant access to for this supplier. This will allow them to request remote audits on your behalf.

Add Template Delete Selected Templates

Share Date	Share By	Audit Template Name
Currently no Remote Audits Templates are accessible for this supplier...		

Specifications  
Products  
Supplier Types and Business Activities  
Product Checks  
Company Stock  
Questionnaires  
Audits  
Remote Audit Templates

**Step 2:** Select the audit shared that you want to delete then select **Delete Selected Templates**

Abattoir 1

Profile Associated Sites Supplier Data Location Compliance Contacts Notes Accessible Data Data Forms Supply Chain Map

Selected items have been successfully shared

Remote Audit Templates

Select which Remote Audit Template you would like to grant access to for this supplier. This will allow them to request remote audits on your behalf.

Add Template Delete Selected Templates

Share Date	Share By	Audit Template Name	Site	Supplier Visibility	Custom Share Group	
<input checked="" type="checkbox"/>	05/10/2022 15:34:52	Steve Jones	Animal Welfare Standard	Group	All Suppliers	---

## 5.9 DATA FORMS – WHAT THIS IS & HOW TO USE IT

This is where you add content to your Internal data forms & request content from your supplier on External data forms. When complete this is where you view this data as well. Remember you created the forms in point 1.1.2.2.

## 5.9.1 HOW VIEW & POPULATE INTERNAL DATA FORMS


**Step 1:** Navigate to your **Data Forms** tab for that supplier. Then select **Internal Form**

**Abattoir 1** [Return to Supplier Manager](#)

Profile Associated Sites Supplier Data Location Compliance Contacts Notes Accessible Data **Data Forms** Supply Chain Map

Company profile last updated on the: 22/07/2022.

Internal Form  
External Forms



Linked FC Company	Abattoir 1
Factory Code	US 323232
Telephone	123456789101
Email	info@abattoir.com
Website	www.abattoir.com

**Step 2:** Select the site that the suppliers form is active. The form will appear

**Abattoir 1** [Return to Supplier Manager](#)

Profile Associated Sites Supplier Data Location Compliance Contacts Notes Accessible Data **Data Forms** Supply Chain Map

ASSOCIATED SITE **Factory 4** [Update Details](#)

**Supplier Bank details**

Bank

Sort Code

Account Number

**Energy Capture Data Form**

**Step 3:** Now select **Update Details**.

**Abattoir 1** [Return to Supplier Manager](#)

Profile Associated Sites Supplier Data Location Compliance Contacts Notes Accessible Data **Data Forms** Supply Chain Map

ASSOCIATED SITE **Factory 4** [Update Details](#)

**Supplier Bank details**

Bank

Sort Code

Account Number

**Energy Capture Data Form**

#### Step 4: Fill in your form & select **Save** when done

**Abattoir 1** [Return to Supplier Manager](#)

Profile Associated Sites Supplier Data Location Compliance Contacts Notes Accessible Data **Data Forms** Supply Chain Map

Factory 4 [Cancel](#) [Save](#)

**Supplier Bank details**

Bank

Sort Code

Account Number

**Energy Capture Data Form**

*This form captures data on oil, electricity and water usage and converts to Carbon metric*

[Cancel](#) [Save](#)

**Step 5:** You can now view your data form from here as well.

## 5.9.2 HOW VIEW & POPULATE EXTERNAL DATA FORMS

#### Step 1: Navigate to your **Data Forms** tab for that supplier. Then select **External Forms**

**ABC Snacks Ltd** [Return to Supplier Manager](#)

Profile Associated Sites Supplier Data Location Compliance Contacts Notes Accessible Data **Data Forms**

Company profile last updated on the: 04/11/2021.

[Internal Form](#)  
[External Forms](#)

Linked FC Company ABC Snacks Ltd

Factory Code NZ 347761

Email barry.innes@abcfond.com

**ABC**

#### Step 2: Now select **Request Details**

**ABC Snacks Ltd** [Return to Supplier Manager](#)

Profile Associated Sites Supplier Data Location Compliance Contacts Notes Accessible Data **Data Forms**

**External Data Forms**

Supplier Type	Requested From	Requested Date	Requested By	Required By	Form
Snacks	----	----	----		<a href="#">Request Details</a>

#### Step 3: Now select the details of the request & select **Request Information** when done

**Request Details from Supplier** [X](#)

Supplier User

Required By (Optional)

Include Message (Optional)

[Cancel](#) [Request Information](#)

#### Step 4: The status is now set as Pending

ABC Snacks Ltd

Profile

Associated Sites

Supplier Data

Location

Compliance

Contacts

Notes

Accessible Data

Data Forms

Return to Supplier Manager

External Data Forms

Supplier Type	Requested From	Requested Date	Requested By	Required By	Form
Snacks	Barry Jones	05/10/2022 15:18:12	Steve Jones	19/10/2022	Pending

#### Step 5: Once supplier completes you can see the details of the form by selecting View Details

Abattoir 1

Return to Supplier Manager

Profile

Associated Sites

Supplier Data

Location

Compliance

Contacts

Notes

Accessible Data

Data Forms

Supply Chain Map

External Data Forms

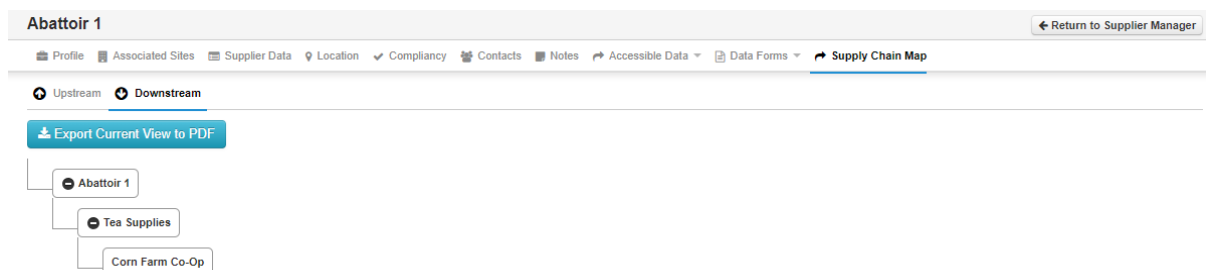
Supplier Type	Requested From	Requested Date	Requested By	Required By	Form
Abattoirs	User 1 Abattoir	03/09/2021 15:55:15	Steve Jones	10/09/2021	<div><div>View Details</div></div>

#### Step 6: The external forms opens up, with the data the supplier submitted

Abattoir 1 <span>Return to Supplier Manager</span>									
Profile	Associated Sites	Supplier Data	Location	Compliance	Contacts	Notes	Accessible Data	Data Forms	Supply Chain Map
Abattoirs									
External Data form - Request from Supplier									
Question 1									
Question 2									
Question 3									
Comments									

## 5.10 SUPPLY CHAIN MAP – WHAT THIS IS & HOW TO USE IT

If you have the Supply Chain Mapping tool and have supply chains mapped out this tab will be activated where you can simply see the Upstream & Downstream chain for this supplier





## 6. SUPPLIER APPROVAL

Supplier Approval is activated & functional If you have it turned on in point 1.1.8. Once activated the tab you see below appears. Once you have it activated and the settings chosen for this process any supplier you add that falls into your rules will end up in this tab, under New Supplier Requests. If you have Verification Requests turned on a new supplier first needs verified before it drops into New Supplier Requests.

### 6.1 VERIFICATION REQUESTS

#### 6.1.1 VERIFY SUPPLIER

**Step 1:** The verifier gets notified that a new supplier needs verified. They must navigate to the **Supplier Approval** tab then **Verification Requests**.

**Supplier Manager**

Supplier List | Supplier Attributes | **Supplier Approval** | Compliance | Contacts List | Supply Chain Map | Supplier Listing | Maps | Activity Overview | Admin

Default | Custom View 1 | **New Supplier Requests** | Verification Requests

Site: Democo (Group) | Supplier Type: All | Status: All | Country: All | Search: Search... | Filter | Clear Filters

Supplier Sub Type: All | Supplied Via: All | Lead Technical: All | Compliant Level: All

Business Activity: Food | Business Sub Activity: All

Add New | Detail Reports | Export to Excel | Summary Report | Bulk Update | Map View | Via Chain View | Attributes

Viewing 10 results Page 1 of 1

Factory Code(s)	Company Name	Country	Supplier Type	Supplier Sub Type	Lead Technical	Supplied Via	Status	Compliant	
US 323232	Abattoir 1	United States	Meat Processor	Beef, Lamb, Pork	Steve Jones		Approved	Compliant	View

**Step 2:** You can now see the suppliers that need verified first. Select **Verify** beside your supplier

**Supplier Manager**

Supplier List | Supplier Attributes | **Supplier Approval** | Compliance | Contacts List | Supply Chain Map | Supplier Listing | Maps | Activity Overview | Admin

Site: All | Supplier Type: All | Search: Search Supplier Name... | Filter | Clear Filters

Viewing 4 results Page 1 of 1

Supplier Name	Supplier Type	Request Reason	Request From	Supplier Contact			
UserX	Ingredients	reason	Steve Jones	Oliveira Antunes	Verify	Reject	
UserX - UserX Site 1 - Tester	Ingredients	reason	Steve Jones	Oliveira Antunes	Verify	Reject	
Foods Connected Ltd	Ingredients	reason	Steve Jones	Gemma Devine	Verify	Reject	
Foods Connected	Abattoirs	new supplier	Steve Jones	-	Verify	Reject	

### Step 3: Now select **Verify Supplier**

Verify Supplier ×

Are you sure you wish to verify this Supplier?

Cancel **Verify Supplier**

### Step 4: Supplier is now verified and in your **New Supplier Requests** tab

#### 6.1.2 REJECT SUPPLIER

**Step 1:** The verifier gets notified that a new supplier needs verified. They must navigate to the **Supplier Approval** tab then **Verification Requests**.

**Supplier Manager**

Supplier List | Supplier Attributes | **Supplier Approval** | Compliance | Contacts List | Supply Chain Map | Supplier Listing | Maps | Activity Overview | Admin

Default | Custom View 1 | New Supplier Requests | Verification Requests

Site: Democo (Group) | Supplier Type: All | Status: All | Country: All | Search: Search... **Filter** **Clear Filters**

Supplier Sub Type: All | Supplied Via: All | Lead Technical: All | Compliant Level: All

Business Activity: Food | Business Sub Activity: All

**Add New** | Detail Reports | Export to Excel | Summary Report | Bulk Update | Map View | Via Chain View | Attributes

Viewing 10 results. Page 1 of 1

<input type="checkbox"/>	Factory Code(s)	Company Name	Country	Supplier Type	Supplier Sub Type	Lead Technical	Supplied Via	Status	Compliant		
<input type="checkbox"/>	US 323232	Abattoir 1	United States	Meat Processor	Beef, Lamb, Pork	Steve Jones		Approved	Compliant		<b>View</b>

**Step 2:** You can now see the suppliers that need verified first. To reject a request select **Reject** beside your supplier.

**Supplier Manager**

Supplier List | Supplier Attributes | **Supplier Approval** | Compliance | Contacts List | Supply Chain Map | Supplier Listing | Maps | Activity Overview | Admin

Site: All | Supplier Type: All | Search: Search Supplier Name... **Filter** **Clear Filters**

Viewing 4 results. Page 1 of 1

Supplier Name	Supplier Type	Request Reason	Request From	Supplier Contact			
UserX	Ingredients	reason	Steve Jones	Oliveira Antunes		<b>Verify</b>	<b>Reject</b>
UserX - UserX Site 1 - Tester	Ingredients	reason	Steve Jones	Oliveira Antunes		<b>Verify</b>	<b>Reject</b>
Foods Connected Ltd	Ingredients	reason	Steve Jones	Gemma Devine		<b>Verify</b>	<b>Reject</b>
Foods Connected	Abattoirs	new supplier	Steve Jones	-		<b>Verify</b>	<b>Reject</b>

### Step 3: Give a reason for reject, then select **Reject**

**Reject Supplier Request** ✕

Reason

Reason For Rejecting Supplier Request (optional)...

Cancel **Reject**

**Step 4:** The supplier has now been rejected and will not enter the supplier approval process.

## 6.2 NEW SUPPLIER REQUESTS

After a supplier has been verified it will drop in the New Supplier Requests tab. (Or if verification is not activated your supplier will automatically drop into New Supplier Requests.)

**Step 1:** The verifier gets notified that a new supplier needs verified. They must navigate to the **Supplier Approval** tab then **New Supplier Requests**.

**Supplier Manager**

Supplier List **Supplier Approval** Compliance Contacts List Supply Chain Map Supplier Listing Maps Activity Overview Admin

**New Supplier Requests**  
Verification Requests

Default Custom View 1

Site: Democo (Group) Supplier Type: All Status: All Country: All Search: Search... Filter Clear Filters

Supplier Sub Type: All Supplied Via: All Lead Technical: All Compliant Level: All

Business Activity: Food Business Sub Activity: All

+ Add New Detail Reports Export to Excel Summary Report Bulk Update Map View Via Chain View Attributes

Viewing 10 results. Page 1 of 1

	Factory Code(s)	Company Name	Country	Supplier Type	Supplier Sub Type	Lead Technical	Supplied Via	Status	Compliant	
<input type="checkbox"/>	US 323232	Abattoir 1	United States	Meat Processor	Beef, Lamb, Pork	Steve Jones		Approved	Compliant	View

**Step 2:** You can now see the suppliers in the supplier approval process.

**Supplier Manager**

Supplier List Supplier Attributes **Supplier Approval** Compliance Contacts List Supply Chain Map Supplier Listing Maps Activity Overview Admin

Site: All Supplier Type: All RFI Approved: All Lead Technical: All Search: Search Supplier Name... Filter Clear Filters

Viewing 2 results. Page 1 of 1

Supplier Name	Request Reason	Request From	Supplier Contact	RFI Status	Lead Technical	
Foods Connected	new supplier	Steve Jones	-	✗	Steve Jones	View
Acme Food Co	New supplier	Steve Jones	-	✓	Ian Collins	View

10 25 50 100 | << first < previous next > last >>

RFI stands for Request for information, if you have this activated on point 1.4.1 and chosen a questionnaire you can send this RFI to your supplier

## 6.2.1 RFI STATUS

**Step 1:** First thing to do here is to send your Request For Information questionnaire if you have this activated. (If you do not have this activated, please ignore this point)

Supplier Manager

Supplier List

Supplier Attributes

Supplier Approval

Compliance

Contacts List

Supply Chain Map

Supplier Listing

Maps

Activity Overview

Admin

Site

Supplier Type

RFI Approved

Lead Technical

Search

Filter

All

All

All

All

Search Supplier Name...

Clear Filters

Viewing 2 results. Page 1 of 1

Supplier Name	Request Reason	Request From	Supplier Contact	RFI Status	Lead Technical		
Foods Connected	new supplier	Steve Jones	-	<div></div>	Steve Jones	<div></div>	<div></div>
Acme Food Co	New supplier	Steve Jones	-	<div></div>	Ian Collins	<div></div>	<div></div>

102550100

<< first < previous next > last >>

**Step 2:** Hoover over the red RFI Status, then select.

Supplier Manager

Supplier List

Supplier Attributes

Supplier Approval

Compliance

Contacts List

Supply Chain Map

Supplier Listing

Maps

Activity Overview

Admin

Site

Supplier Type

RFI Approved

Lead Technical

Search

All

All

All

All

Search Supplier Name...

Filter

Clear Filters

Viewing 2 results. Page 1 of 1

Supplier Name	Request Reason	Request From	Supplier Contact	RFI Status	Lead Technical		
Foods Connected	new supplier	Steve Jones	-	<div>X</div>	Steve Jones	<div></div>	<div></div>
Acme Food Co	New supplier	Steve Jones	-	<div>✓</div>	Ian Collins	<div></div>	<div></div>

102550100

<< first < previous next > last >>

**Step 3:** Now select the recipient, the respond by date & a message if you like. Select send RFI document when done. (Before you send make sure you have a supplier contact set)

Approve - Foods Connected

Request By	Steve Jones
Reason for Request	new supplier
RFI Document	New Supplier Questionnaire (DR, S, Tri, Pag)
Recipient / Contact	User 1 Abattoir 2
Respond By Date	08/11/2022
Message (Optional)	<input type="text" value="Enter a message..."/>

#### Step 4: The RFI status is now amber and RFI sent

Supplier Manager

Supplier List

Supplier Attributes

Supplier Approval

Compliance

Contacts List

Supply Chain Map

Supplier Listing

Maps

Activity Overview

Admin

Site

Supplier Type

RFI Approved

Lead Technical

Search

All

All

All

All

Search Supplier Name...

Filter

Clear Filters

Viewing 2 results. Page 1 of 1

Supplier Name	Request Reason	Request From	Supplier Contact	RFI Sent	Lead Technical		
Foods Connected	new supplier	Steve Jones	User 1 Abattoir 2	<div>RFI Sent</div> <div></div>	Steve Jones	<div></div>	<div></div>
Acme Food Co	New supplier	Steve Jones	-	<div></div>	Ian Collins	<div></div>	<div></div>

#### Step 5: Once the supplier completes the RFI and sends back the status will go yellow and state Requires Your Action. Select then RFI status

Supplier Manager

Supplier List

Supplier Attributes

Supplier Approval

Compliance

Contacts List

Supply Chain Map

Supplier Listing

Maps

Activity Overview

Admin

Site

Supplier Type

RFI Approved

Lead Technical

Search

All

All

All

All

Search Supplier Name...

Filter

Clear Filters

Viewing 2 results. Page 1 of 1

Supplier Name	Request Reason	Request From	Supplier Contact	RFI Requires Action	Lead Technical	
Foods Connected	new supplier	Steve Jones	User 1 Abattoir 2		Steve Jones	<div><div></div><div></div></div>
Acme Food Co	New supplier	Steve Jones	-		Ian Collins	<div><div></div><div></div></div>

#### Step 6: This takes you to the Questionnaire Manager where you review, request more info if necessary then ultimately approve. Once you approve this questionnaire and go back to the Supplier Approval tab your RFI Status is now green.

Supplier Manager

Supplier List

Supplier Attributes

Supplier Approval

Compliance

Contacts List

Supply Chain Map

Supplier Listing

Maps

Activity Overview

Admin

Site

Supplier Type

RFI Approved

Lead Technical

Search

Filter

All

All

All

All

Search Supplier Name...

Clear Filters

Viewing 2 results. Page 1 of 1

Supplier Name	Request Reason	Request From	Supplier Contact	RFI Status	Lead Technical		
Foods Connected	new supplier	Steve Jones	User 1 Abattoir 2	<div>✓</div>	Steve Jones	<div><div></div></div>	<div><div></div></div>
Acme Food Co	New supplier	Steve Jones	-	<div>✓</div>	Ian Collins	<div><div></div></div>	<div><div></div></div>

## 6.2.2 APPROVING / DECLINING A SUPPLIER

After you complete your RFI (Or if RFI is not activated you begin here) you monitor your suppliers as they complete each rule you have set. In this example below we have set the supplier approval rule that Suppliers company profile needs updated, they need to sign off on documents you have shared (Supplier document manager), They must upload any documents you have requested (Document request manager), they must answer any questionnaires you have sent (Questionnaire manager) And any audits you have performed on them must be confirmed. Each of these are completed within

their respective tools and you confirm that these questionnaires, documents etc are approved in the tool. This then updates here in the Supplier Approval tab, new supplier requests.

**Step 1:** Monitor your supplier on this table and as they complete one of your rules the rule will go green. Amber means you need to send or request. Red means the supplier has not responded or completed.

Acme Food Co	New supplier	Steve Jones	-		Ian Collins		
--------------	--------------	-------------	---	--	-------------	--	--

Group

COMPANY PROFILE	Compliant - Company profile last updated on: 27/07/2022	
DOCUMENT SHARES	Shared Documents - 0/0 Signed Off	
DOCUMENT REQUESTS	Documents - 0/1 Mandatory Document(s) Uploaded Not Uploaded Documents - All documents in this list are required - Anti Slavery Policy	
QUESTIONNAIRES	Sent Questionnaires - 1/1 Completed	
SUPPLIER AUDITS	Sent Supplier Audits - 0/0 Completed	

**Additional Checks**
Click Flags Below to Complete...

Is this supplier from a high risk country? - Incomplete	Add Additional Comment Upon Completion...	
Do this supplier have any GFSI accreditation? - Incomplete	Add Additional Comment Upon Completion...	

Decline





**Step 2:** If you have setup additional rules/checks in your supplier approval rules in point 1.2.1.9 these will appear at the bottom, like above. To answer these additional rules/checks, select the pencil icon then select save when done. (If you haven't setup additional checks ignore this step)

**Additional Checks**
Click Flags Below to Complete...





Is this supplier from a high risk country? - Incomplete	Add Additional Comment Upon Completion...	
Do this supplier have any GFSI accreditation? - Incomplete	Add Additional Comment Upon Completion...	

Decline

### Step 3: Fill in your answers then select **Save**

Additional Checks		Click Flags Below to Complete...
Is this supplier from a high risk country? - <i>Incomplete</i>	<div>  <input type="text" value="Answered"/> </div>	
Do this supplier have any GFSI accreditation? - <i>Incomplete</i>	<div>  <input type="text" value="Answered"/> </div>	

### Step 4: You can also attach a file here too,

Additional Checks		Click Flags Below to Complete...
Is this supplier from a high risk country? - <i>Incomplete</i>	<div>  <input type="text" value="Answered"/> </div> <div>Click to select document</div>	
Do this supplier have any GFSI accreditation? - <i>Incomplete</i>	<div>  <input type="text" value="Answered"/> </div>	

### Step 5: Once complete hover over the red square & select to state that it is complete.

Additional Checks		Click Flags Below to Complete...
Is this supplier from a high risk country? - <i>Incomplete</i>	<div>  <input type="text" value="Answered"/> </div>	
Do this supplier have any GFSI accreditation? - <i>Incomplete</i>	<div>  <input type="text" value="Answered"/> </div>	

### Step 6: This now turns green

Additional Checks		Click Flags Below to Complete...
Is this supplier from a high risk country? - <i>Complete</i>	<div>  <input type="text" value="Answered"/> </div>	
Do this supplier have any GFSI accreditation? - <i>Complete</i>	<div>  <input type="text" value="Answered"/> </div>	

**Step 7:** When all rules are green then you can decide to approve or decline. To approve select **Approve** & to decline select **Decline**. When you select **Approve** the supplier now falls into your main supplier list.

**Additional Checks** Click Flags Below to Complete...

Is this supplier from a high risk country? - Complete	Answered	
Do this supplier have any GFSI accreditation? - Complete	Answered	

**Approve** **Decline**

## 7. COMPLIANCE

Compliance is where you see the overall compliance of your suppliers based on the subscriptions you have & the compliance rules you have setup for certain supplier types. The compliance rules where setup in point 1.2.

### 7.1 SUMMARY

The summary is where you see the main compliance. Here is where you will see all suppliers and what they are compliant, non-compliant & what tool isn't activated as a rule.

**Step 1:** Select **Compliance**, then **Summary**

**Supplier Manager**

Supplier List Supplier Attributes Supplier Approval **Compliance** Contacts List Supply Chain Map Supplier Listing Maps Activity Overview Admin

Compliance Levels are updated automatically each night, manually update via the Compliance tab on the supplier's profile...

Site: Democo (Group) Associated Site: Factory 4 Lead Time: All Supplier Type: All Supplier Sub Type: All Status: All Filter Clear Filters

Company Profile: All Doc Mgr Shares: All Doc Requests: All Questionnaires: All Audits: All

Summary (Based on current filters) Export



## 7.2 DETAILS, WHAT THIS IS & HOW TO USE

The Details button lets you deep dive into what transactions and records there is between you & that supplier.

### Step 1: Select Details

Notify Selected Suppliers		Search...					
<input type="checkbox"/>	Supplier	Company Profile	Document Shares	Document Requests	Questionnaires	Audits	Overall Compliance
<input type="checkbox"/>	Abattoir 1 (US 323232) <a href="#">Details</a>	✓	N/A	N/A	N/A	N/A	✓
<input type="checkbox"/>	ABC Laboratories (1234) <a href="#">Details</a>	N/A	N/A	N/A	N/A	N/A	N/A
<input type="checkbox"/>	Acorn Produce (EC 343434) <a href="#">Details</a>	N/A	N/A	✗	✓	N/A	✗
<input type="checkbox"/>	Dairy Co (EC 212121) <a href="#">Details</a>	✓	✓	✓	✓	✗	✗
<input type="checkbox"/>	Spice Supplier (EC4040404) <a href="#">Details</a>	✗	N/A	✗	✗	N/A	✗

### Step 2: Now you can see further details on what has & hasn't been completed by the supplier.

Compliance Overview

Dairy Co
[View Supplier Profile](#)

COMPANY PROFILE
✓ Compliant - Company profile last updated on: 12/10/2022

DOCUMENT SHARES
➔ Shared Documents - 7/7 Signed Off

DOCUMENT REQUESTS
Documents - 4/4 Mandatory Document(s) Uploaded

QUESTIONNAIRES
\* Mandatory Questionnaires - 1/1 Sent - 1/1 Completed

SUPPLIER AUDITS
➔ Sent Supplier Audits - 3/3 Completed
  
\* Mandatory Audit Types - 0/1 Completed & In Date
  
📌 Audit Types Requiring Completion
  
- Cold Storage

Export
Close

**Step 3:** If you want to view the suppliers profile from here select **View Supplier Profile**. This will open their profile on another tab

Compliance Overview

Dairy Co
[View Supplier Profile](#)

**Step 4:** Once done select close.

### 7.2.1 NOTIFY SELECTED USERS, WHAT THIS IS & HOW TO USE

This function allows you to select suppliers and send them a reminder notification through Foods Connected to inform them that they still have outstanding information to supply. The systems knows what they are outstanding on and will only send remind them of those.

**Step 1:** Select the suppliers that haven't submitted information. So that would be any supplier with a red x against a tool. The select **Notify Selected Suppliers**

Notify Selected Suppliers

Search...

<input type="checkbox"/>	Supplier		Company Profile	Document Shares	Document Requests	Questionnaires	Audits	Overall Compliance
<input type="checkbox"/>	Abattoir 1 (US 323232)	<div>Details</div>	✓	N/A	N/A	N/A	N/A	✓
<input type="checkbox"/>	ABC Laboratories (1234)	<div>Details</div>	N/A	N/A	N/A	N/A	N/A	N/A
<input type="checkbox"/>	Acom Produce (EC 343434)	<div>Details</div>	N/A	N/A	✗	✓	N/A	✗
<input type="checkbox"/>	Dairy Co (EC 212121)	<div>Details</div>	✓	✓	✓	✓	✗	✗
<input checked="" type="checkbox"/>	Spice Supplier (EC4040404)	<div>Details</div>	✗	N/A	✗	✗	N/A	✗

**Step 2:** If you now select **Preview Email**. It will show you what type of mail your suppliers will receive.

Supplier Manager - Compliance - Notify Supplier

← Back

Select the user\* from each supplier you would like to notify and we will send them their current compliance status and instructions on how to improve it.

Spice Supplier	<div>User 1 Spice</div>	<div>Q Preview Email</div>
	<div>Cancel</div> <div>Send</div>	

**Step 3:** The amil looks like this. Select **Close** when done

Preview

×

Steve Jones of Democo has sent you a summary of your current Foods Connected compliance for **Spice Supplier** below.

Instructions on how to rectify any of the areas where you are non-compliant are included.

×

**Company Profile - Non-Compliant**

Democo has requested that you update your company profile every 12 months. Your company profile was last updated on '02/04/2020'.

To rectify this access 'Edit Company Profile' via the settings cogs and review your details.

×

**Document Requests - Non-Compliant**

Democo has requested company documents from you.

To rectify this access 'Supplier Approval > Supplier Tools > Document Request Manager > Received Document Requests' from here you upload/attach required documents.

×

**Questionnaires - Non-Compliant**

Democo has shared questionnaire(s) with you that require action.

To rectify this access 'Supplier Approval > Customer Tools > Supplier Questionnaire > Received Questionnaires' from here you can access and complete the questionnaire.

Close

**Step 3:** Select user to send to & when done select **Send**.

**Supplier Manager - Compliance - Notify Supplier** ← Back

Select the user from each supplier you would like to notify and we will send them their current compliance status and instructions on how to improve it.

Spice Supplier	User 1 Spice	<span>Preview Email</span>
	<span>Cancel</span> <span>Send</span>	

**Step 4:** Reminder now sent

## 7.3 CATEGORY COMPLIANCE

If you are using Category Compliance rules and have it turned on this is where you see the compliance. Here is where you will see all suppliers and what they are compliant, non-compliant & what tool isn't activated as a rule.

**Step 1:** Select **Compliance**, then **Summary**

**Supplier Manager**

Supplier List | Supplier Attributes | Supplier Approval | **Compliance** | Contacts List | Supply Chain Map | Supplier Listing | Maps | Activity Overview | Admin

Compliance Levels are updated automatically each night, manually update a supplier via the Compliance tab on the supplier's profile...

Category Compliance

Category Overview

History Graph

Site: Democo (Group) | Associated Site: Factory 4 | Lead Time: | Compliance: All | Supplier Type: All | Supplier Sub Type: All | Status: All

Company Profile: All | Doc Mgr Shares: All | Doc Requests: All | Questionnaires: All | Audits: All

Summary (Based on current filters) Export

## 8. CONTACTS LIST

Is literally just a list of all contacts for your suppliers that are active on Foods Connected. This will show ALL contacts for those suppliers

## 9. SUPPLY CHAIN MAP

Is a chain map of your suppliers on Foods Connected and the relationships between them. Here you can see the chain for suppliers for each of your sites.

### 9.1 UPSTREAM

**Step1:** To see the upstream supplier relationship, select **Upstream**

**Supplier Manager**

Supplier List Supplier Attributes Supplier Approval Compliance Contacts List **Supply Chain Map** Supplier Listing Maps Activity Overview Admin

Site: All Supplier Type: All Supplier Sub Type: All Business Activity: All Business Sub Activity: All Search: [ ] Filter Clear Filters

☐ Group By ☐ Group By ☐ Group By ☐ Group By

**Upstream** Downstream

Export Current View to PDF

- Chicken Farmer 1
- + Corn Farm Co-Op**
- + Finished Goods Foods
- Forage Farms
- Packaging Solutions
- Steel Cut Oats
- Tea Exporter

**Step2:** You can now see the upstream supply from suppliers. Select the suppliers with a plus to view.

**Supplier Manager**

Supplier List Supplier Attributes Supplier Approval Compliance Contacts List **Supply Chain Map** Supplier Listing Maps Activity Overview Admin

Site: All Supplier Type: All Supplier Sub Type: All Business Activity: All Business Sub Activity: All Search: [ ] Filter Clear Filters

☐ Group By ☐ Group By ☐ Group By ☐ Group By

**Upstream** Downstream

Export Current View to PDF

- Chicken Farmer 1
- + Corn Farm Co-Op**
- + Finished Goods Foods
- Forage Farms
- Packaging Solutions
- Steel Cut Oats
- Tea Exporter

**Step3:** Select the suppliers with a plus to view further



## 9.2 DOWNSTREAM

**Step1:** To see the downstream supplier relationship, select **Downstream**

**Supplier Manager**

Supplier List | Supplier Attributes | Supplier Approval | Compliance | Contacts List | **Supply Chain Map** | Supplier Listing | Maps | Activity Overview | Admin

Site: All | Supplier Type: All | Supplier Sub Type: All | Business Activity: All | Business Sub Activity: All | Search: | Filter | Clear Filters

☐ Group By ☐ Group By ☐ Group By ☐ Group By

Upstream | **✚ Downstream**

Export Current View to PDF

✚ Abattoir 1

Chicken Farmer 1

Corn Farm Co-Op

Finished Goods Foods

Forage Farms

✚ Meat Processor

Packaging Solutions

Pork Supplier

Steel Cut Oats

Tea Exporter

✚ Tea Supplies

**Step2:** You can now see the downstream supply from suppliers. Select the suppliers with a plus to view.

**Supplier Manager**

Supplier List | Supplier Attributes | Supplier Approval | Compliance | Contacts List | **Supply Chain Map** | Supplier Listing | Maps | Activity Overview | Admin

Site: All | Supplier Type: All | Supplier Sub Type: All | Business Activity: All | Business Sub Activity: All | Search: | Filter | Clear Filters

☐ Group By ☐ Group By ☐ Group By ☐ Group By

Upstream | Downstream

Export Current View to PDF

- Abattoir 1
- Chicken Farmer 1
- Corn Farm Co-Op
- Finished Goods Foods
- Forage Farms
- Meat Processor
- Packaging Solutions
- Pork Supplier
- Steel Cut Oats
- Tea Exporter
- Tea Supplies

**Step3:** Select the suppliers with a plus to view further

Group

Upstream | Downstream

Export Current View to PDF

- Abattoir 1
  - Tea Supplies
  - Corn Farm Co-Op
- Chicken Farmer 1
- Corn Farm Co-Op
- Finished Goods Foods
- Forage Farms
- Meat Processor
  - Corn Farm Co-Op
- Packaging Solutions
- Pork Supplier
- Steel Cut Oats
- Tea Exporter
- Tea Supplies

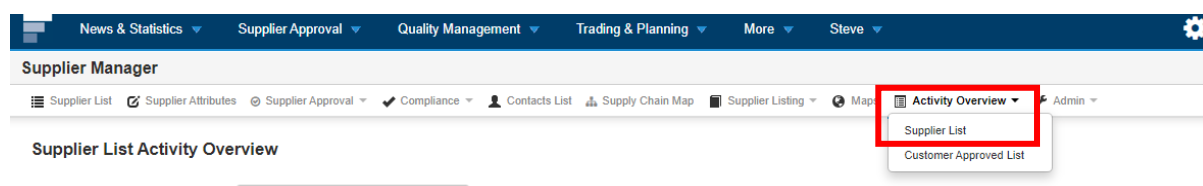
## 10. MAPS

## 11. Activity Overview

Each tool on Foods Connected has an Activity Overview which lets you see the overall activity for this tool.

### 11.1 SUPPLIER LIST OVERVIEW

**Step1:** Select **Activity Overview** then select **Supplier List**.



**Step2:** You can now see the activity for the **Supplier List**.

Supplier Manager

Supplier List

Supplier Attributes

Supplier Approval

Compliance

Contacts List

Supply Chain Map

Supplier Listing

Maps

Activity Overview

Admin

Supplier List Activity Overview

Site

Democo (Group)

Supplier

Search for supplier by name or factory code

Start typing to search your Supplier list for the item by Name or Code

Supplier Sub Type

All

Action Between

Action By

All

Action Type:

All

Search Actions

Filter

Clear Filters

Viewing 2073 results | Page 1 of 21

Export to Excel

Date/Time	Supplier	Supplier Sub Type	User	Action
24/10/2022 16:10:09	Abattoir 1	Beef,Lamb,Pork	User 1 Abattoir	Signed off a document (ESG Policy) from Steve Jones
24/10/2022 16:00:08	Abattoir 1	Beef,Lamb,Pork	Steve Jones	Requested a document (Accreditations & Memberships - Bord Bia Certificate) from User 1 Abattoir
24/10/2022 14:49:47	Abattoir 1	Beef,Lamb,Pork	Steve Jones	Requested a document (Accreditations & Memberships - Bord Bia Certificate) from User 1 Abattoir
13/10/2022 11:32:15	Acme Food Co		Smith Susan	Signed off a document (Delivery Agreements) from Steve Jones
13/10/2022 11:30:47	Acme Food Co		Steve Jones	Requested a document (Factory Document - Anti Slavery Policy) from Smith Susan
13/10/2022 11:21:18	Tester ABC - Site 1	Spices	Steve Jones	Removed from Ingredients
13/10/2022 11:21:18	Tester ABC - Site 1	Spices	Steve Jones	Deleted Supplier
27/09/2022 10:33:01	Drinks Ltd	Soft Drinks	Steve Jones	Shared Individual Product (46778 - Blackthorn Cider) - Share Reason: Build External Specification
27/09/2022 10:28:20	Drinks Ltd	Soft Drinks	Steve Jones	Shared Individual Product (54325 - Diet Cola 2 Litre Bottle) - Share Reason: Build External Specification

**Step 3:** You can now use the filter fields below to filter for specific activity. Select options the select **Filter** when done

### Supplier List Activity Overview

Site: Democo (Group) ▼

Supplier: Abattoir 1 (US 323232)

Start typing to search your Supplier list for the item by Name or Code.

Supplier Sub Type: Beef ▼

Action Between: 01/10/2022 01/11/2022

Action By: Steve Jones ▼

Action Type: Changed Status ▼

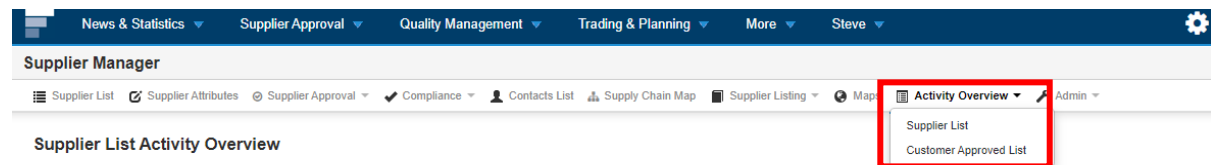
Search Actions:

**Filter** Clear Filters

**Step 4:** When done select **Clear Filters**.

## 11.2 CUSTOMER APPROVED LIST

**Step1:** Select **Activity Overview** then select **Customer Approved List**.



**Step 2:** You can now see the activity for the **Customer Approved List**

### Supplier Manager

Supplier List Activity Overview

Site: Democo (Group) ▼

Supplier: All ▼

Action Between:

Action By: All ▼

Action Type: All ▼

**Filter** Clear Filters

[Export to Excel](#)

Date/Time	Supplier	User	User Company	Action
No activities for the selected criteria...				

10 25 50 100 | << first < previous next > last >>



**Step 3:** You can now use the filter fields below to filter for specific activity. Select options the select **Filter** when done

**Supply Chain Map Activity Overview**


Site:


Democo (Group) ▼

Supplier:

Abattoir 1 ▼

Action Between:

01/10/2022 

01/11/2022 

Action By:

All ▼

Action Type:

Customer Approved List Additioi ▼

Filter

Clear Filters

**Step 4:** When done select **Clear Filters**.

**12. DETAIL REPORTS**

**13. EXPORT TO EXCEL**

**14. SUMMARY REPORT**

**15. BULK UPDATE**

**16. MAP VIEW**

**17. VIA CHAIN VIEW**

**18. ATTRIBUTES**