TOOL USER GUIDE

SUPPLIER MANAGER AND SUPPLIER APPROVAL

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1. INITIAL SETUP – ADMIN TAB

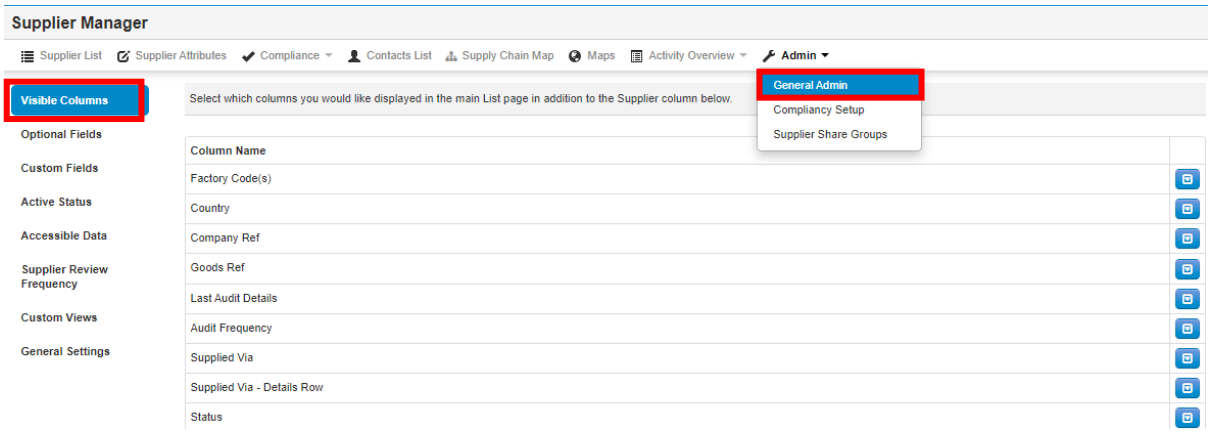
Before you start using the Supplier Manager and all its features there is some Initial setup that needs to be completed prior to adding Suppliers and activating the Supplier Approval Processes.

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

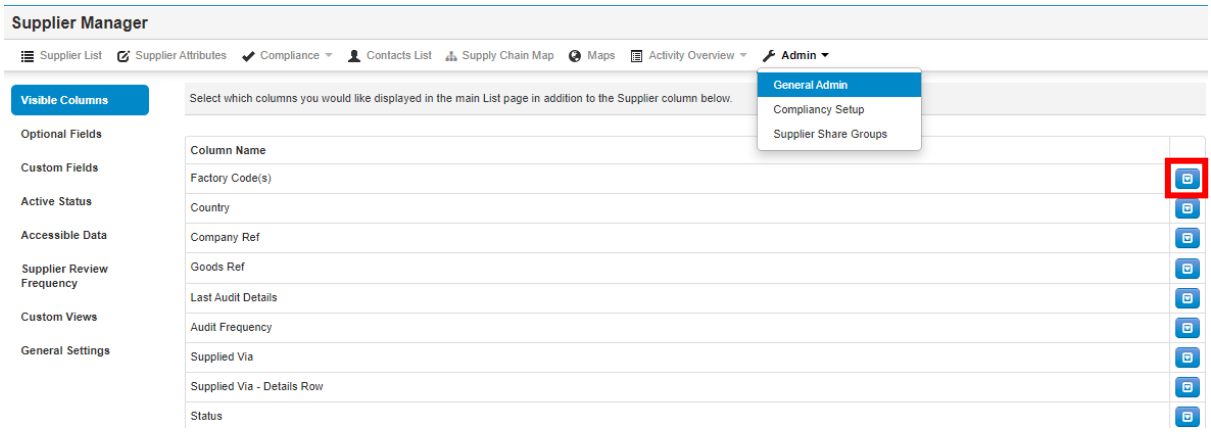
1.1 GENERAL ADMIN

1.1.1 VISIBLE COLUMNS – SETUP

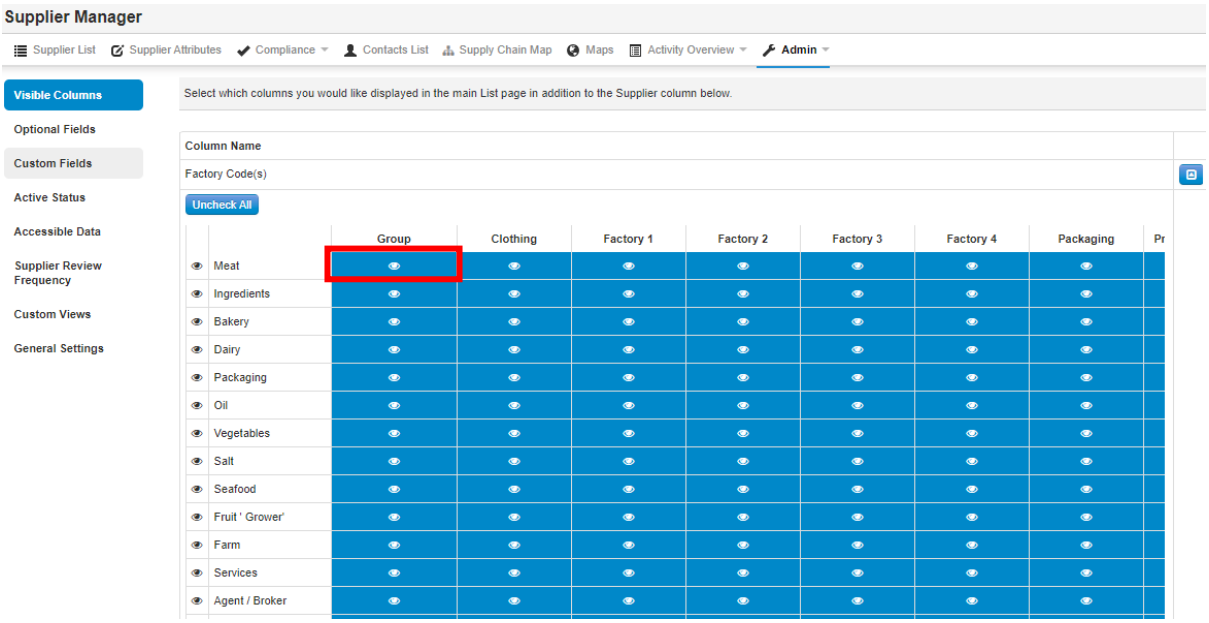
Step 1: Supplier Manger, select ***Admin → General Admin → Visible Columns***



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

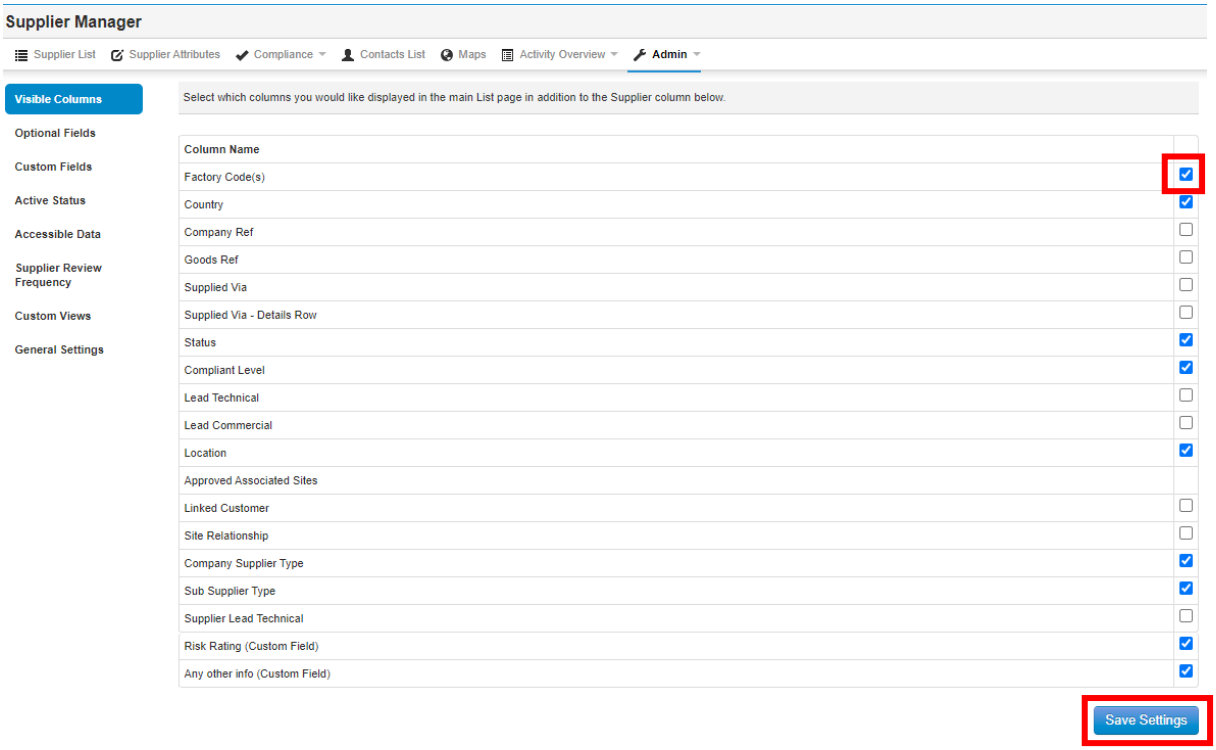


Step 3: If you have your company has multiple sites on Foods Connected you can now select what you want to see for each site by ticking them off. If factory 1 doesn't have any suppliers categorised as Dairy & Oil you can deselect. Select **Save Settings** when done.

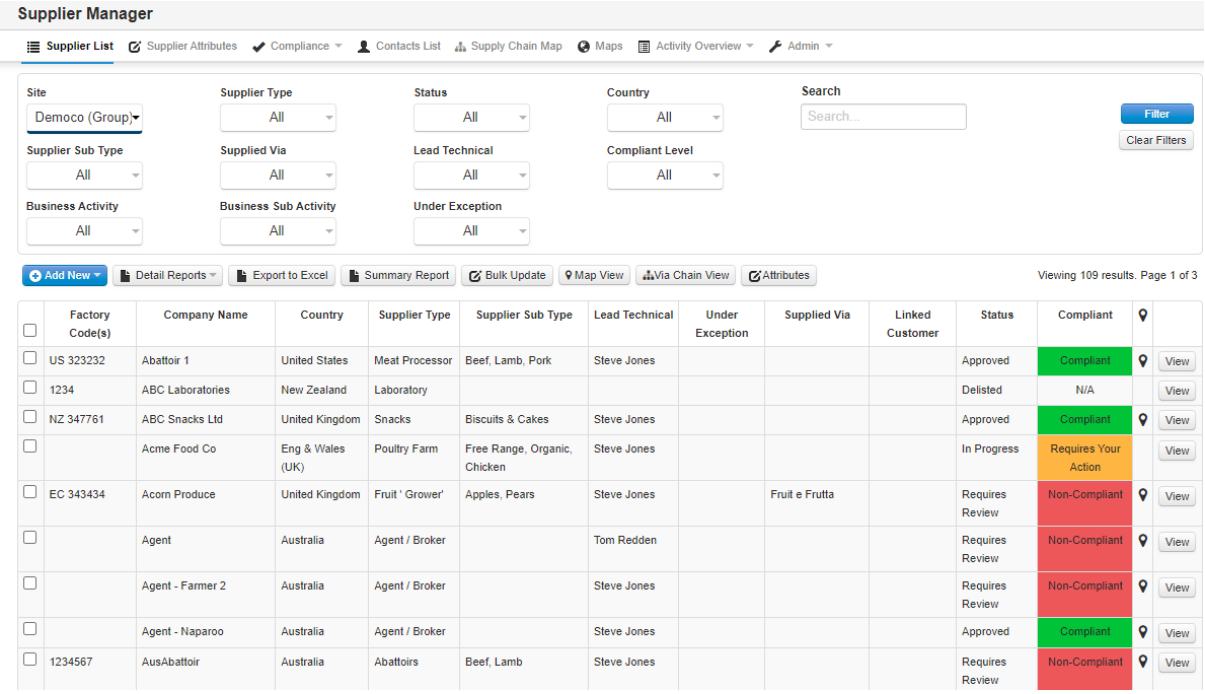


OR

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.



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.

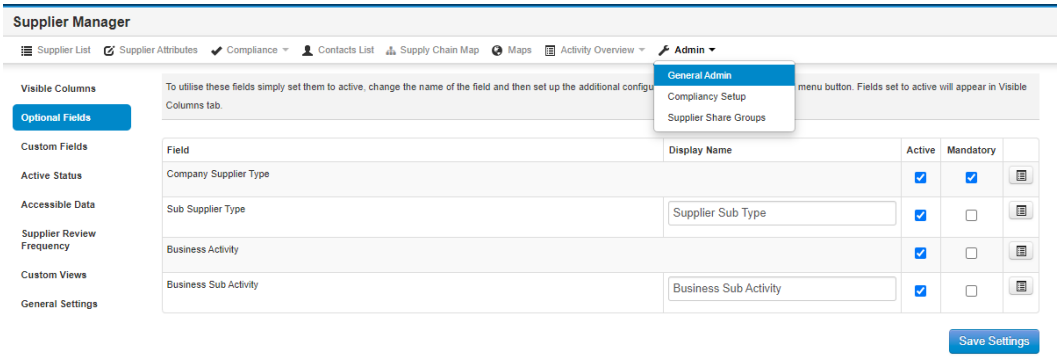


1.1.2 OPTIONAL FIELDS - HOW TO CREATE & SETUP THE OPTIONAL FIELDS

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**)

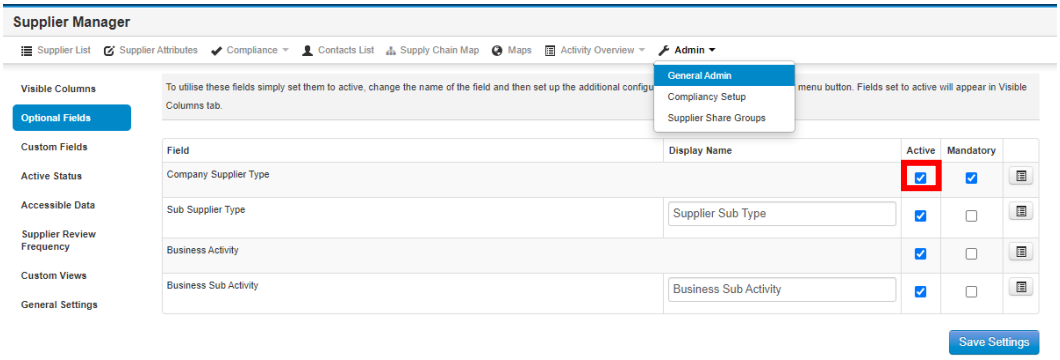
1.1.2.1 How to setup Supplier Types.

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

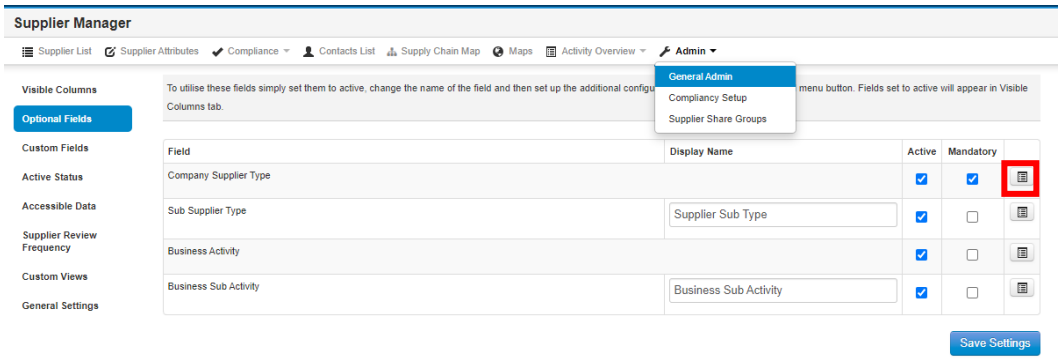


Step 2: Set the ***Company Supplier Type*** to ***Active*** by ticking the Active Box, then select ***Save Settings.***

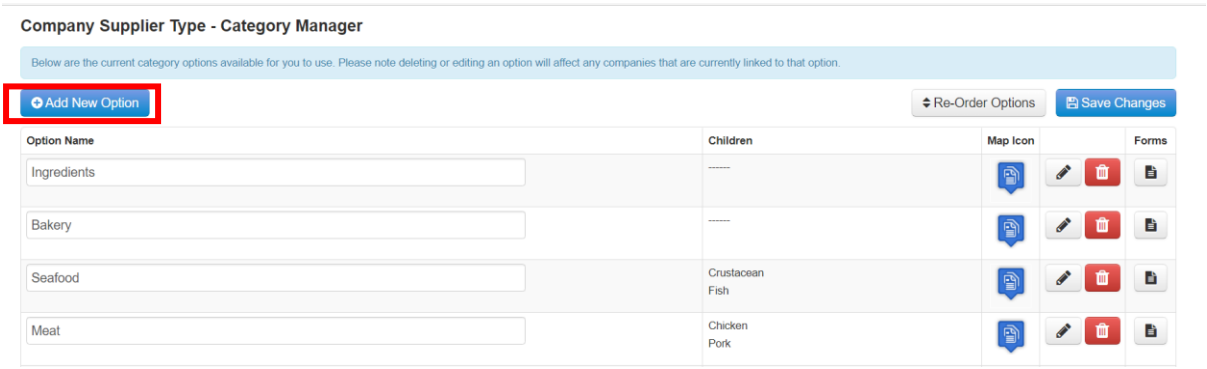
Optional: If you select ***Mandatory*** this means when you go to add a new supplier you need to select the suppliers type when adding or you won't be able to add the supplier to your supplier list. (It becomes a mandatory field)



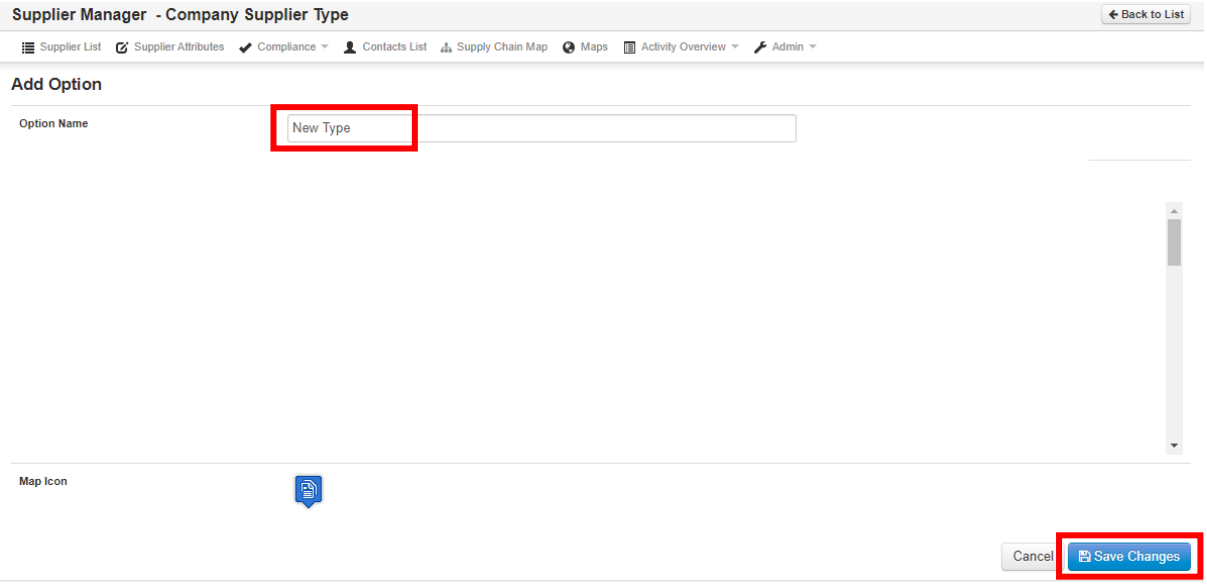
Step 3: Select Menu Key to add required **Types**



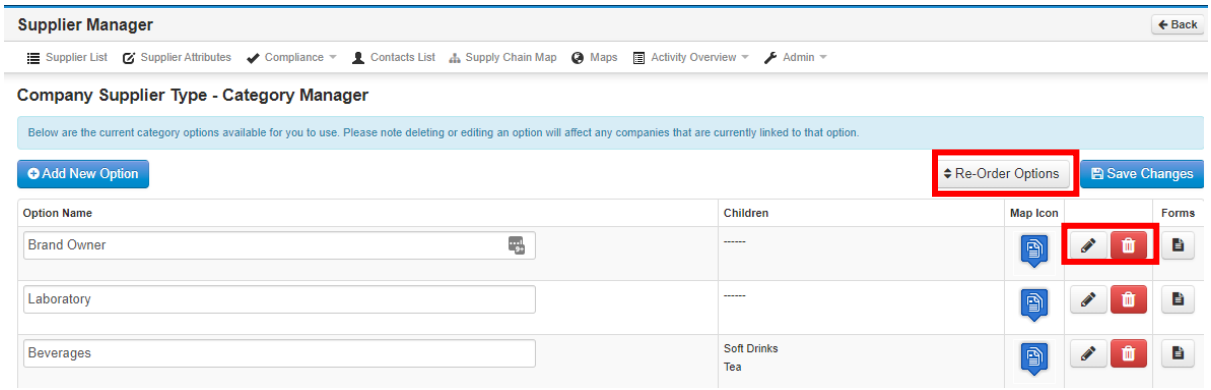
Step 4: Select ***Add New Option*** & add the Supplier Types you require. E.g. Red Meat, Ingredients, Poultry.



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



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



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)**

<u>Internal Forms</u>

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.

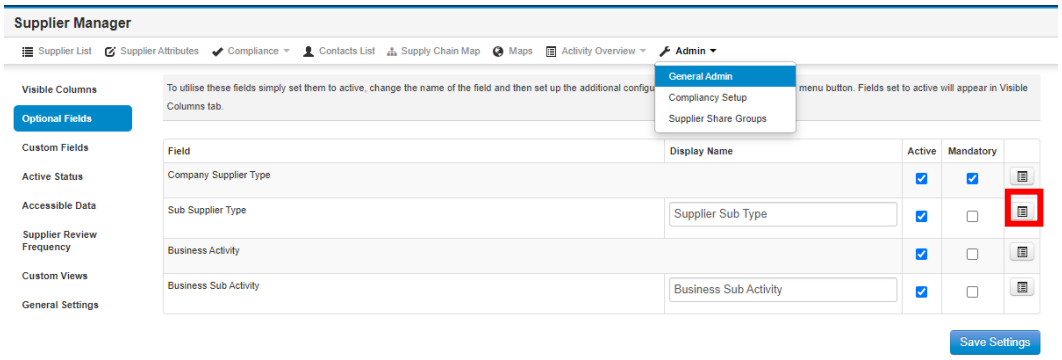
Optional: If you select ***Mandatory*** this means when you go to add a new supplier you need to select the supplier's Sub Type when adding or you won't be able to add the supplier to your supplier list. (It becomes a mandatory field)

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.

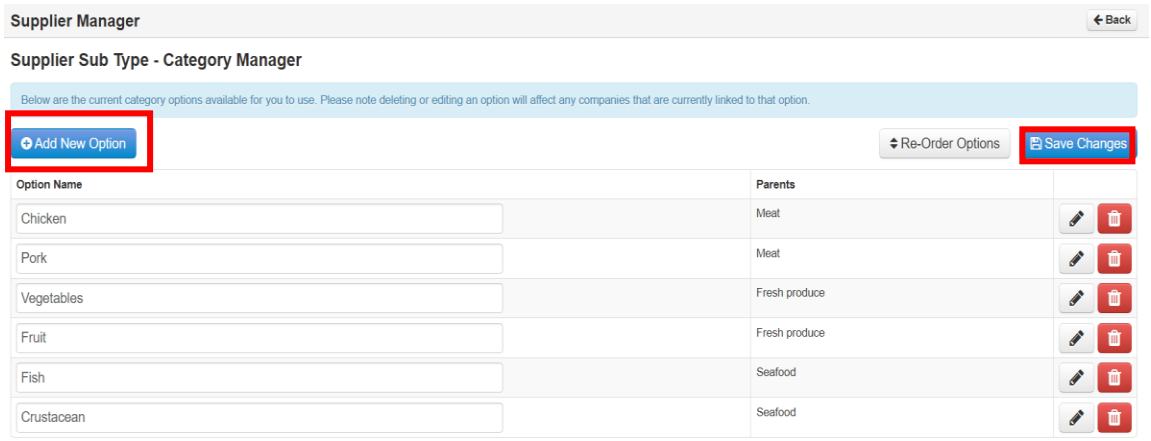
Category → Poultry

Sub Type → Chicken, Duck, Turkey

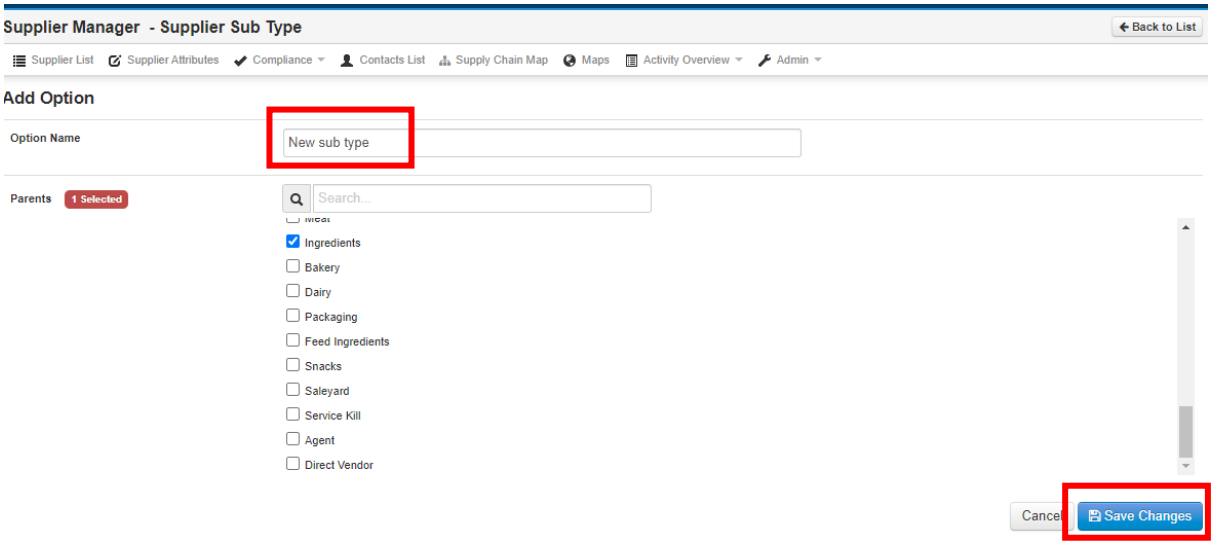
Step 1: Select **Sub Supplier Type**



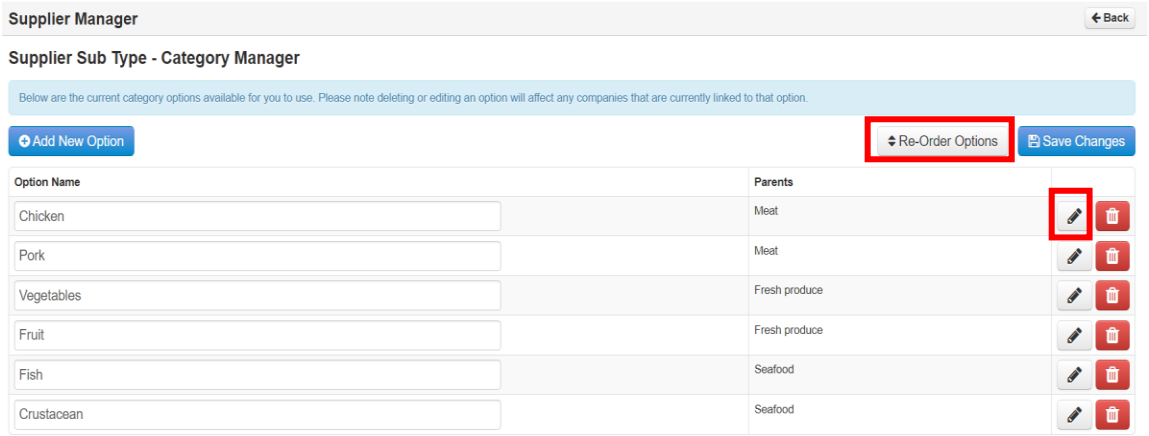
Step 2: Select **Add New Option**



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



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***



1.1.2.4 Business Activity & Sub Activity

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

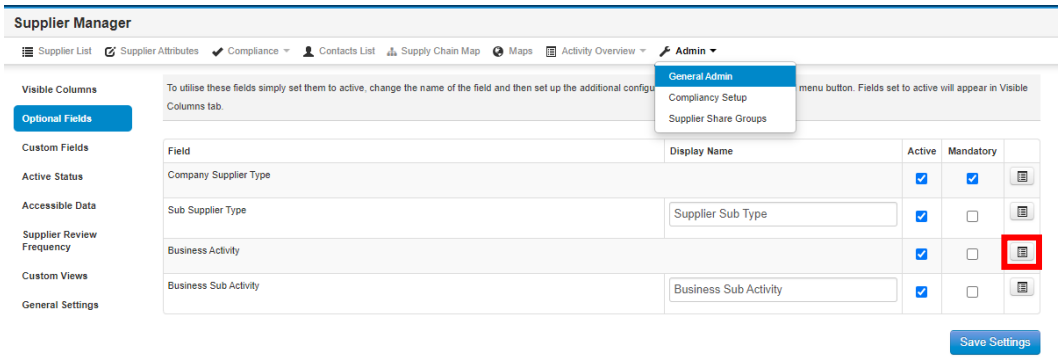
Type – Ingredients > **Sub Type** > Dairy > **Business Activity** > Powder > **Business Sub Activity** Infant

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**.

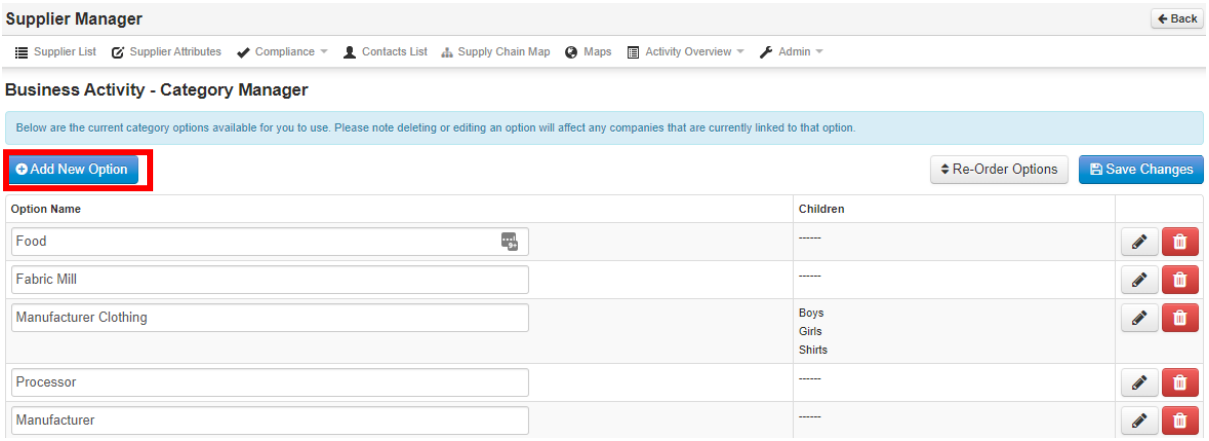
Optional: If you select **Mandatory** this means when you go to add a new supplier you need to select the supplier's **Business Activity** & **Sub Activity** when adding or you won't be able to add the supplier to your supplier list. (It becomes a mandatory field)

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

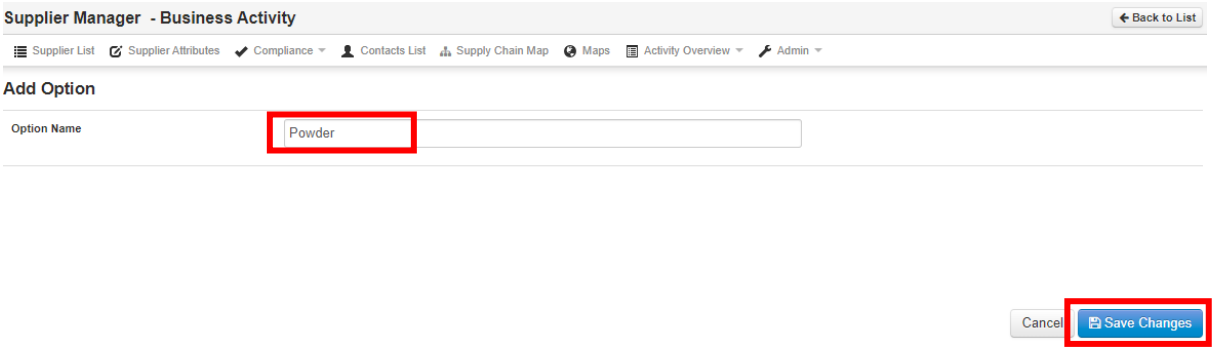
Step 1: Select the **Business Activity**



Step 2: Now select **Add New Option**

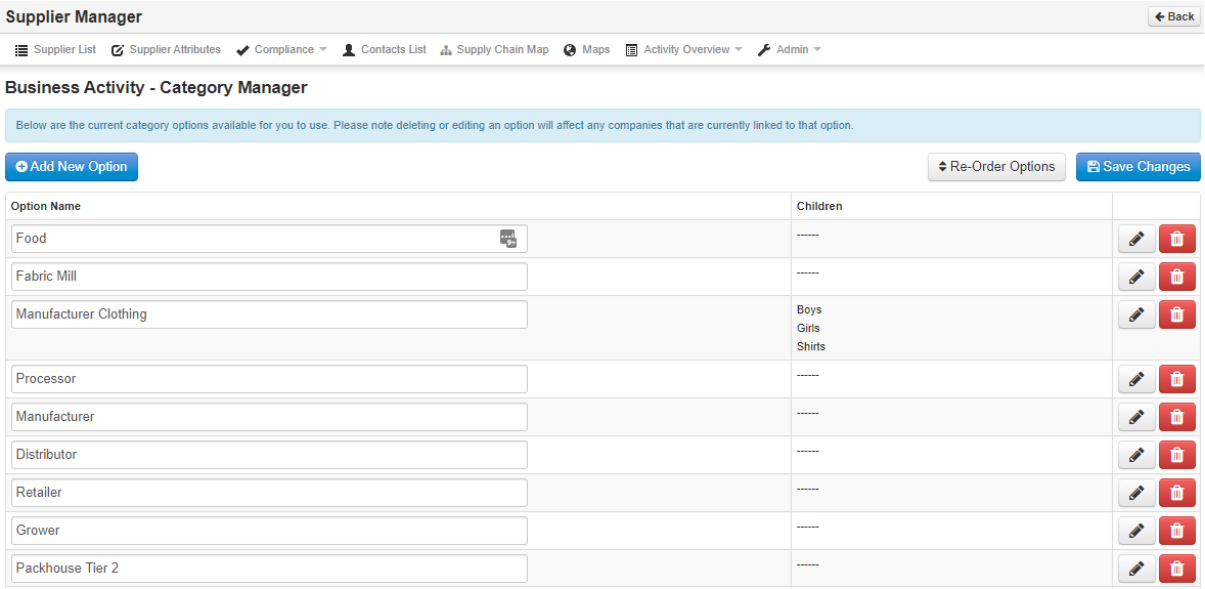


Step 3: Add business activity name, select **Save Changes** when done.



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.**

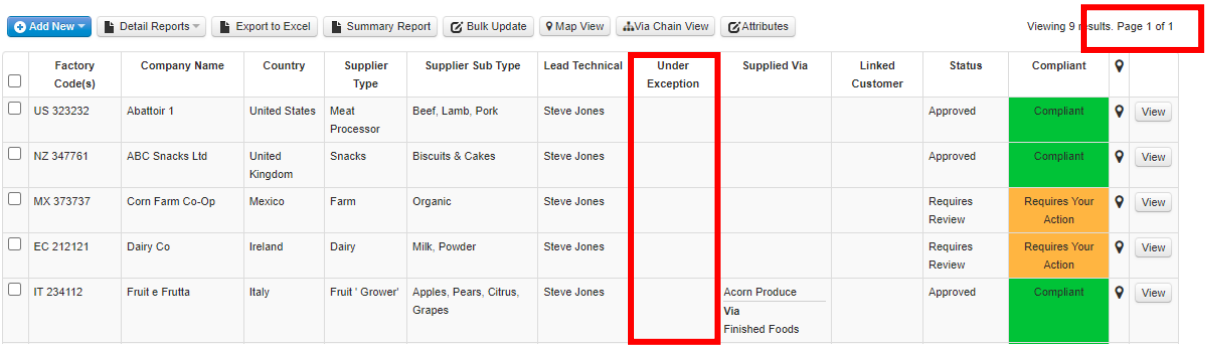
Repeat these same steps for the Business Sub Activity.



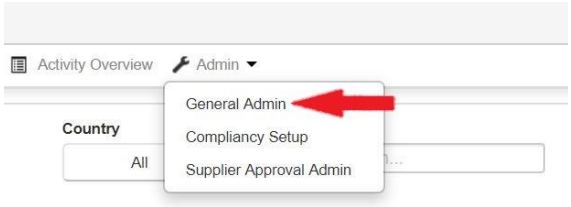
1.1.3 CUSTOM FIELDS - HOW TO CREATE & SETUP CUSTOM FIELDS ON THE SUPPLIER MANAGER

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.

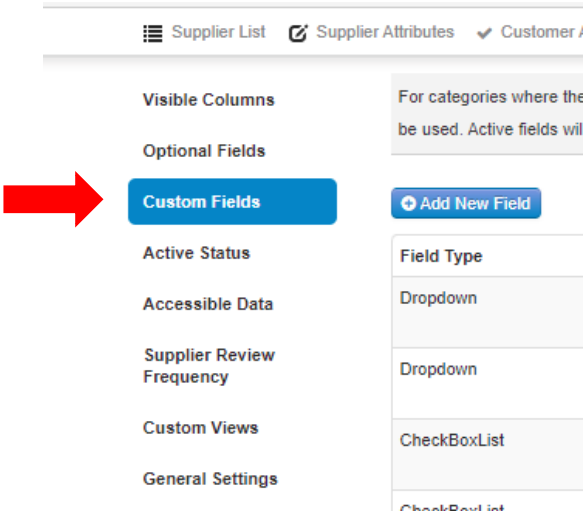
Below is how a custom field will look in your Supplier List



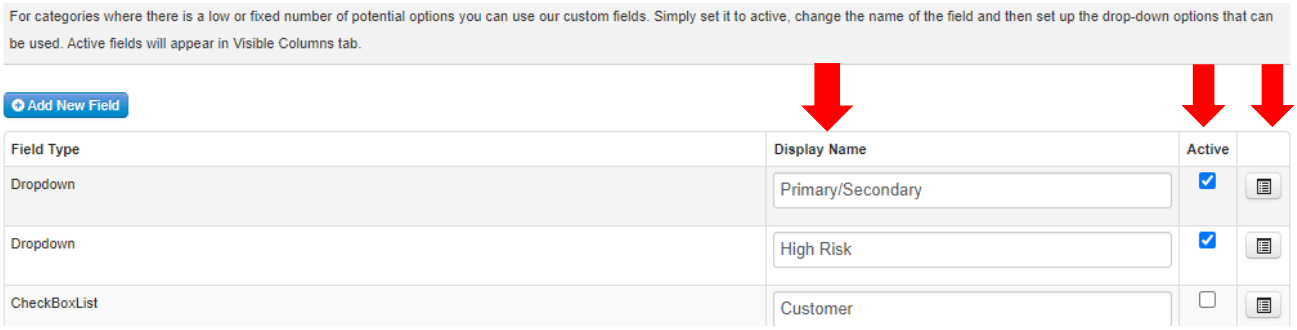
Step 1: Go to the *Admin* section of your Supplier Manager & select ***General Admin***



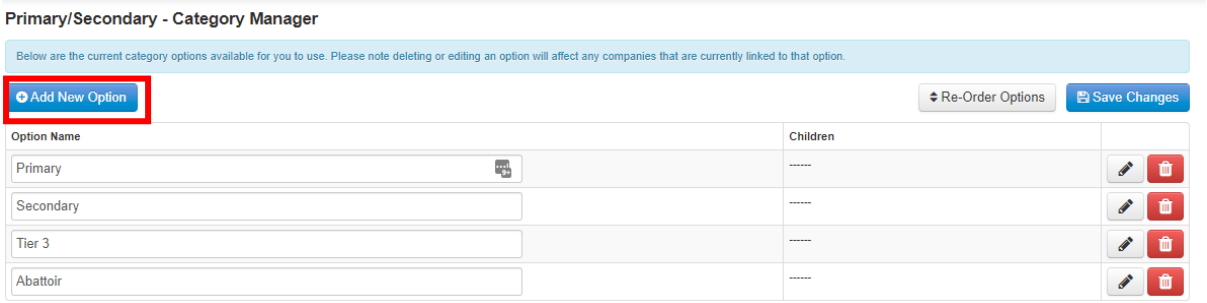
Step 2: Select ***Custom Fields***



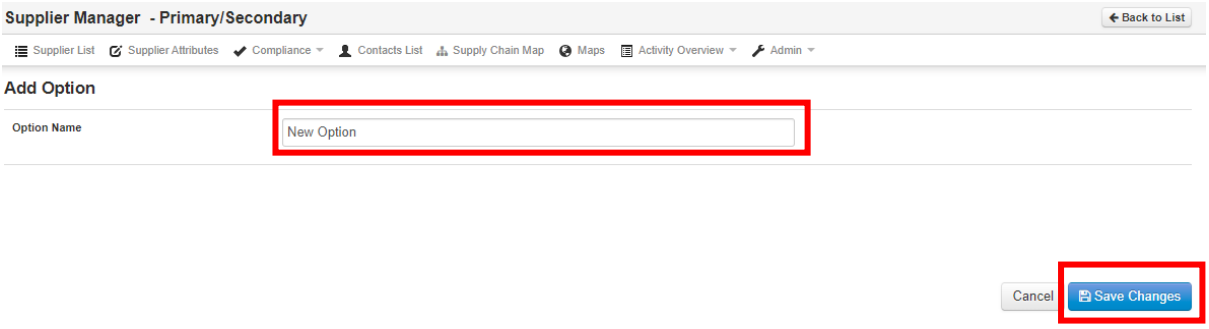
Step 3: On the custom fields page to the right of **Category 1 Field – Dropdown.** Name the field that will appear in the main Supplier List table. Then set the field as **Active** to inable them to appear in the supplier list. Once you complete those steps**,** click on the Menu icon to add the required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



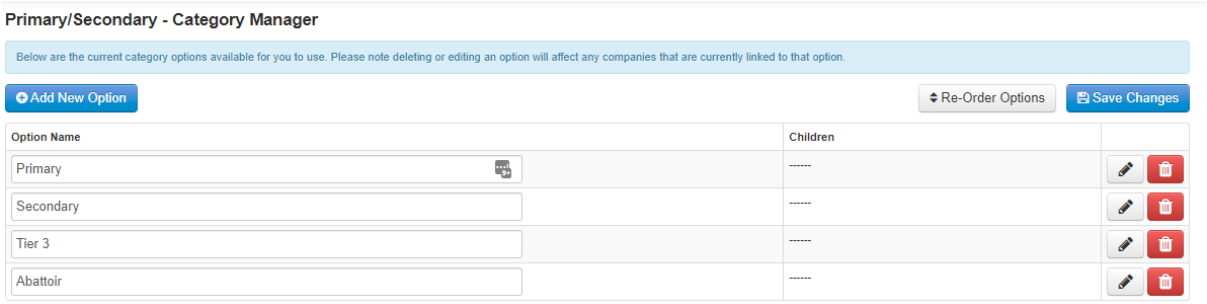
Step 4: Select **Add New Option**



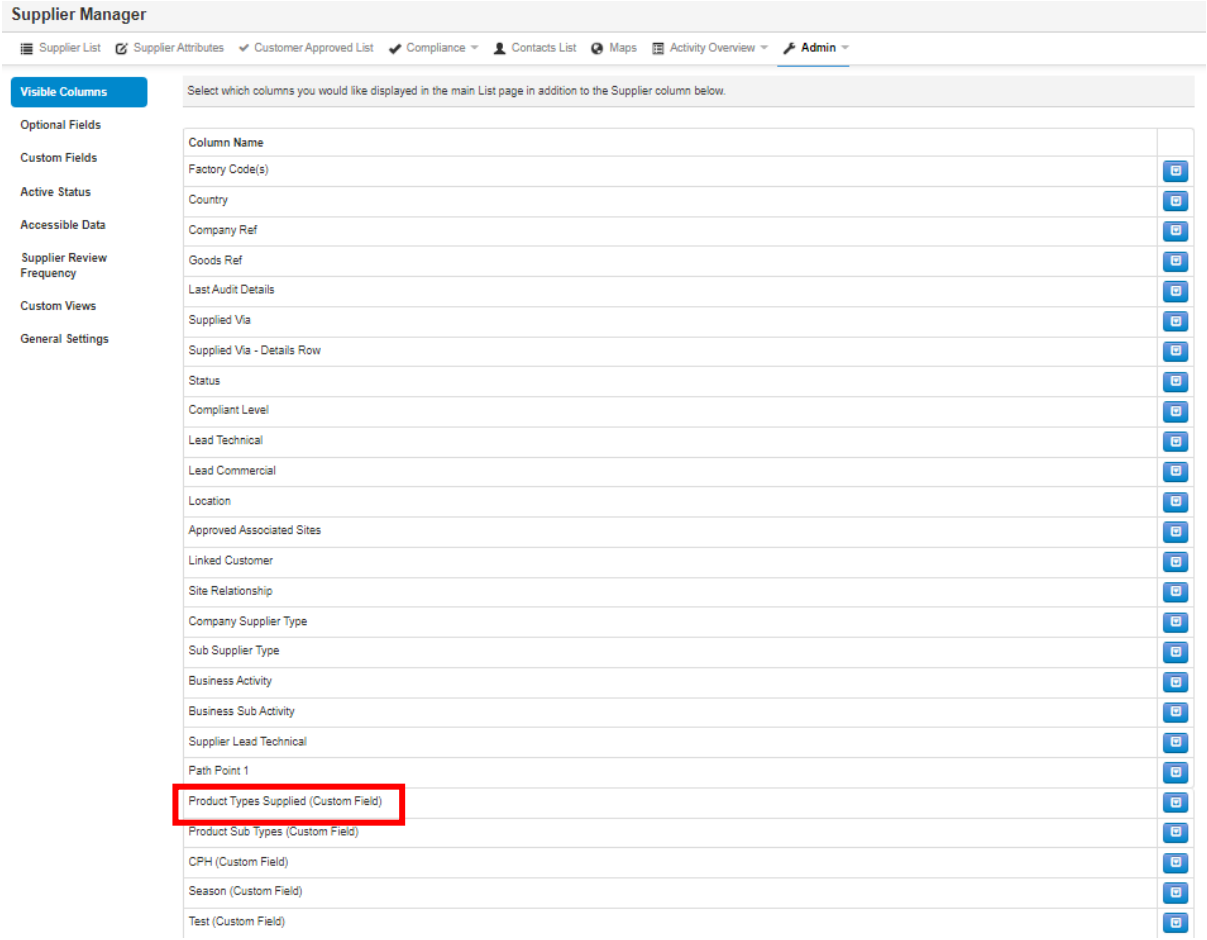
Step 5: Enter in your options required for your custom field. Select **Save Changes** when done



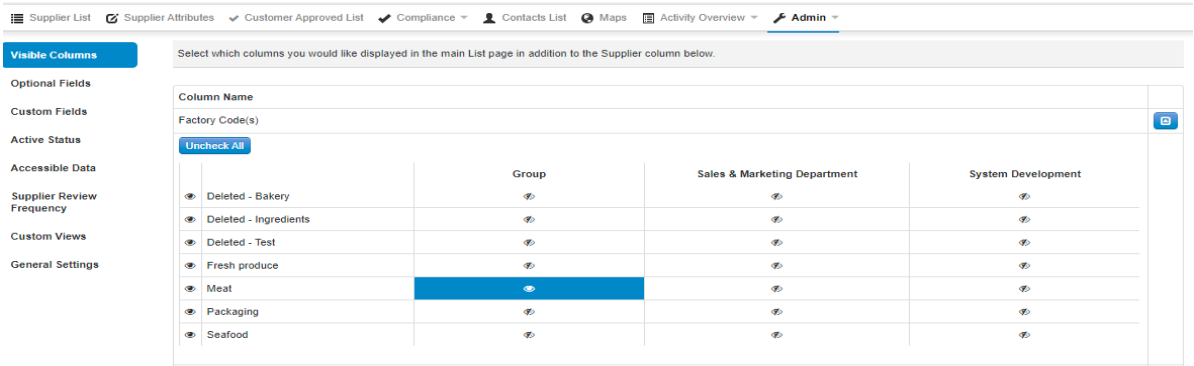
Step 6: Your **Custom Field** options will look like this below. At any stage if you need to edit, select the Edit button & follow the steps above. You can re-order the activities here, and you can delete from here as well. Once done select **Save Changes.**



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**



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.**

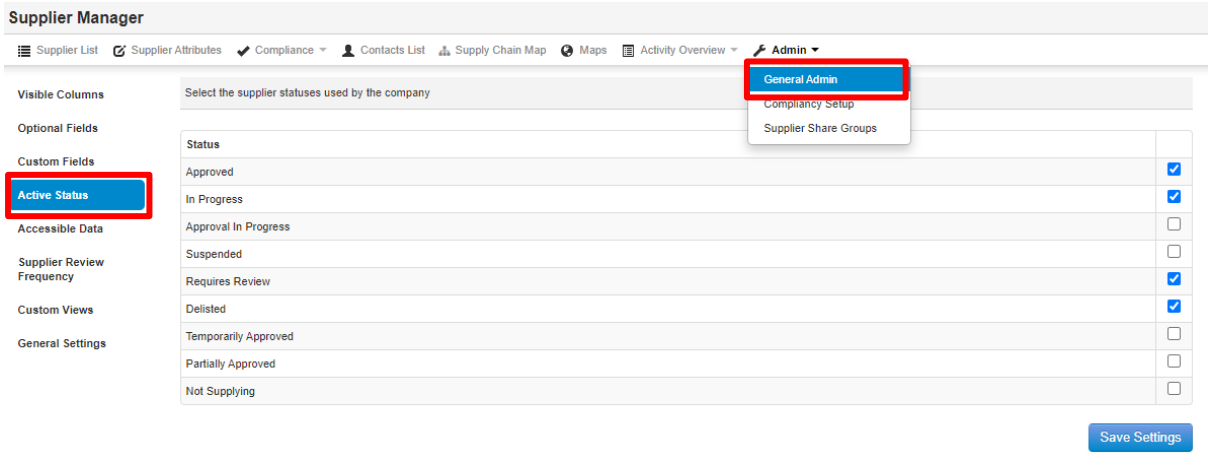


Step 8: You have now completed setting up a custom field in the supplier manager for each. At any stage if you need to edit follow the steps above.

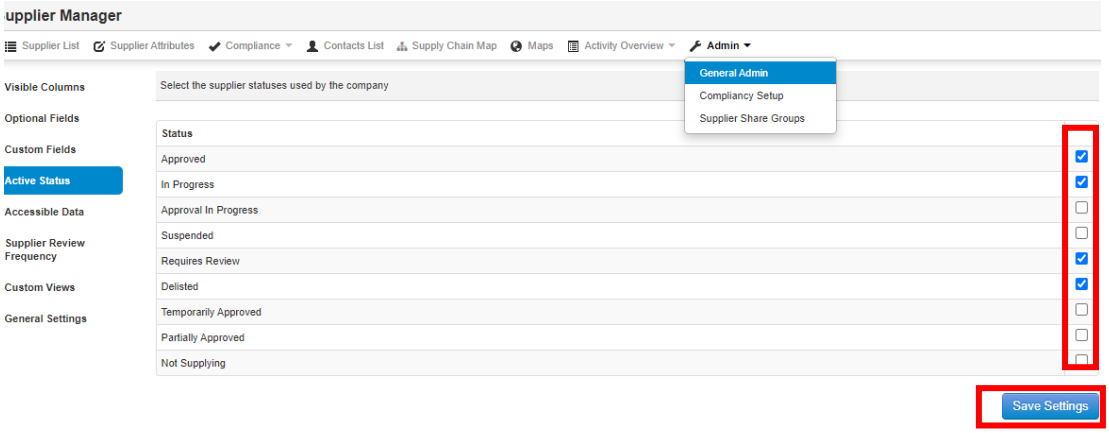
1.1.4 ACTIVE STATUS - SET ACTIVE STATUSES TO USE FOR YOUR SUPPLIER STATUS

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



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**



1.1.5 ACCESIBLE DATA – WHAT IT IS

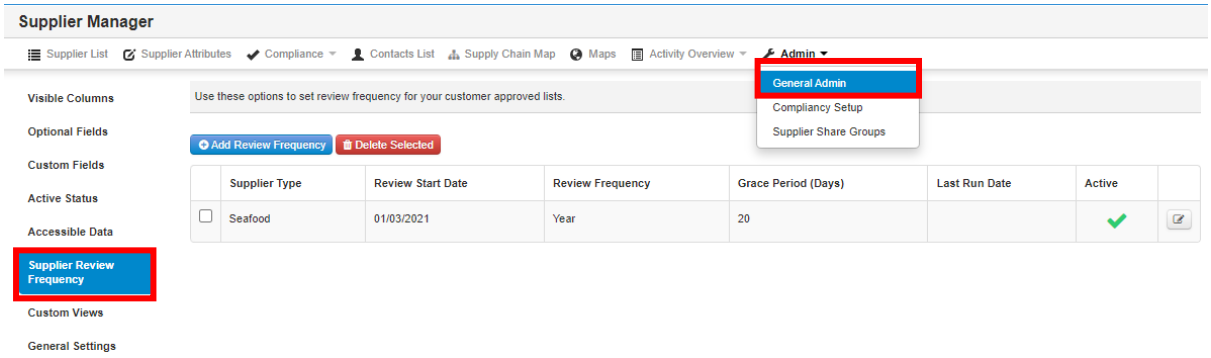
This relates to sharing spec templates, products etc with your suppliers in order for your suppliers to complete external specs**.** We'll touch on this at a later stage**. But if you only want Admins of hr supplier manager to have access to accessible data tick this box.**

1.1.6 SUPPLIER REVIEW FREQUENCY – HOW TO SETUP SUPPLIER REVIEW FREQUENCY

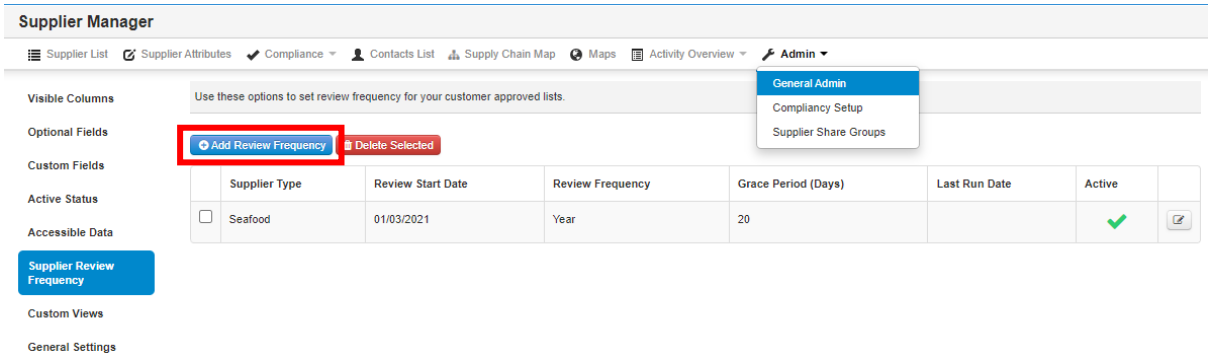
This function allows you to setup a Review Frequency for your suppliers and allows you to setup by supplier types. It will set your suppliers status to In Review.

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

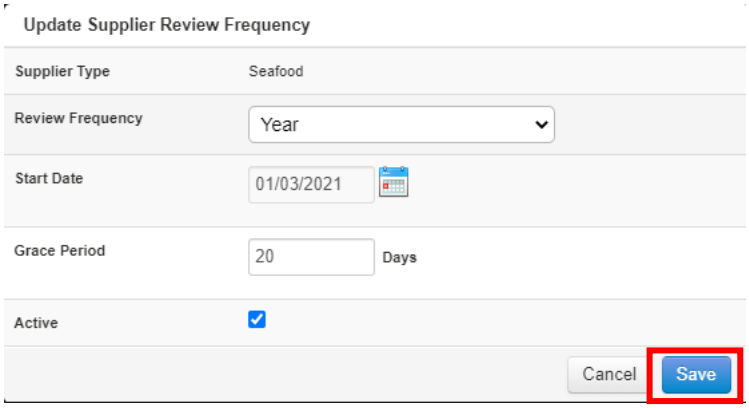
Step 1: Go to **Supplier Manger**, then select **Admin → General Admin → Supplier Review Frequency** on the left



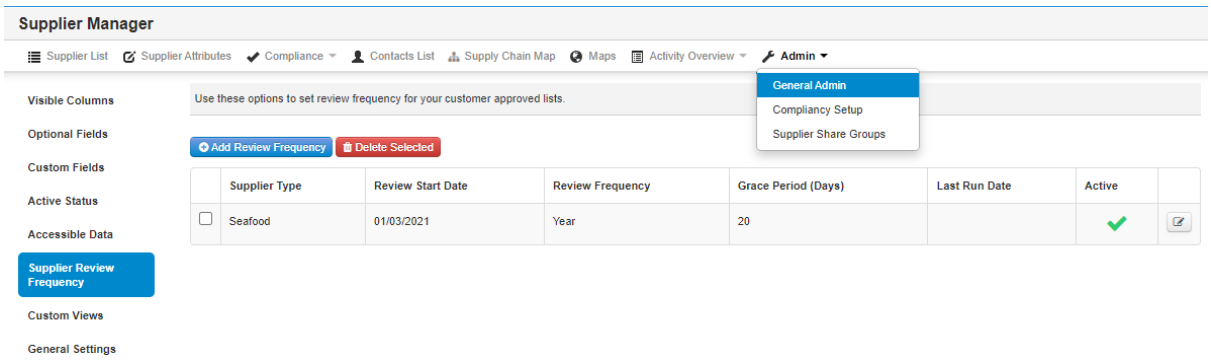
Step 2: Select Add Review Frequency



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



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.

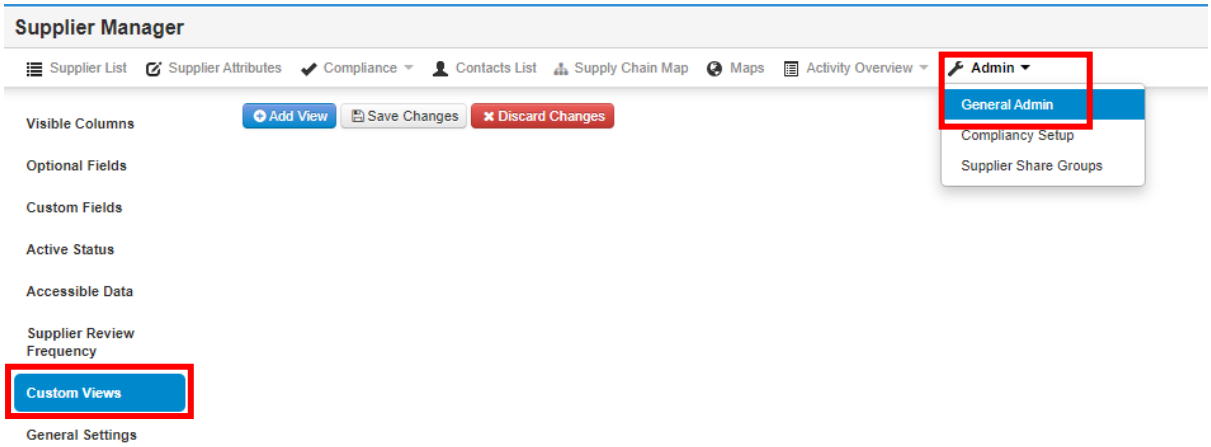


1.1.7 CUSTOM VIEWS – HOW TO CREATE & SETUP CUSTOM VIEWS

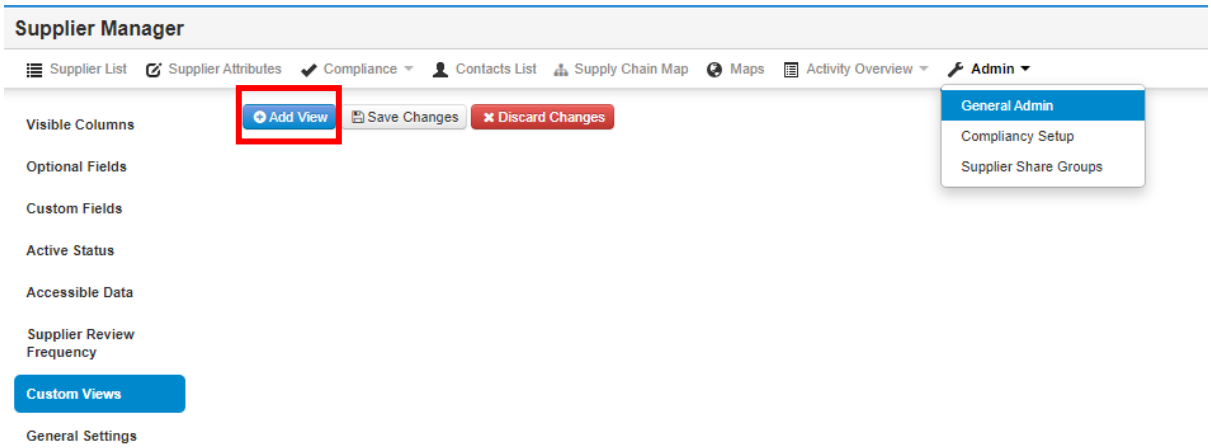
Custom views allow you to setup specific views of your supplier list that may be more specific to your department or area that you work in. These views are built using the existing columns or custom fields you create.

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

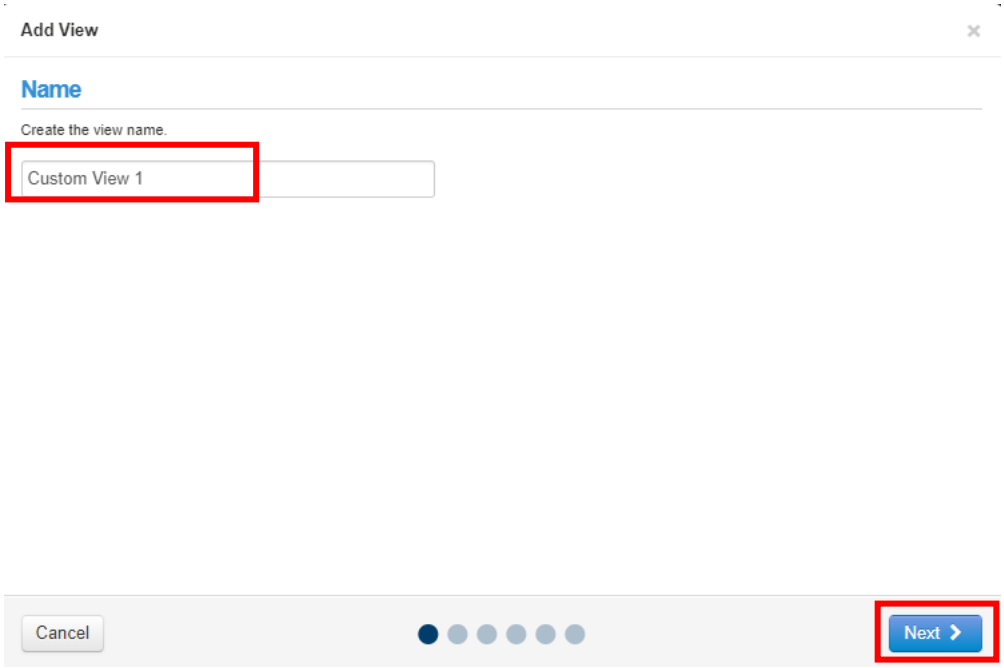
Step 1: Go to **Supplier Manger**, then select **Admin → General Admin → Custom Views** on the left



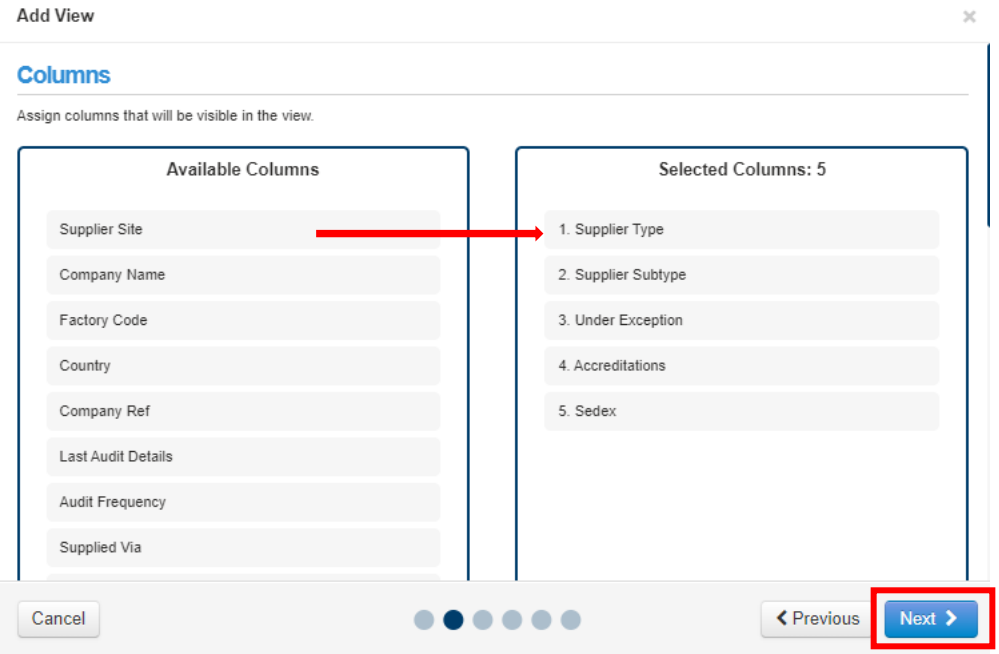
Step 2: Select **Add View**



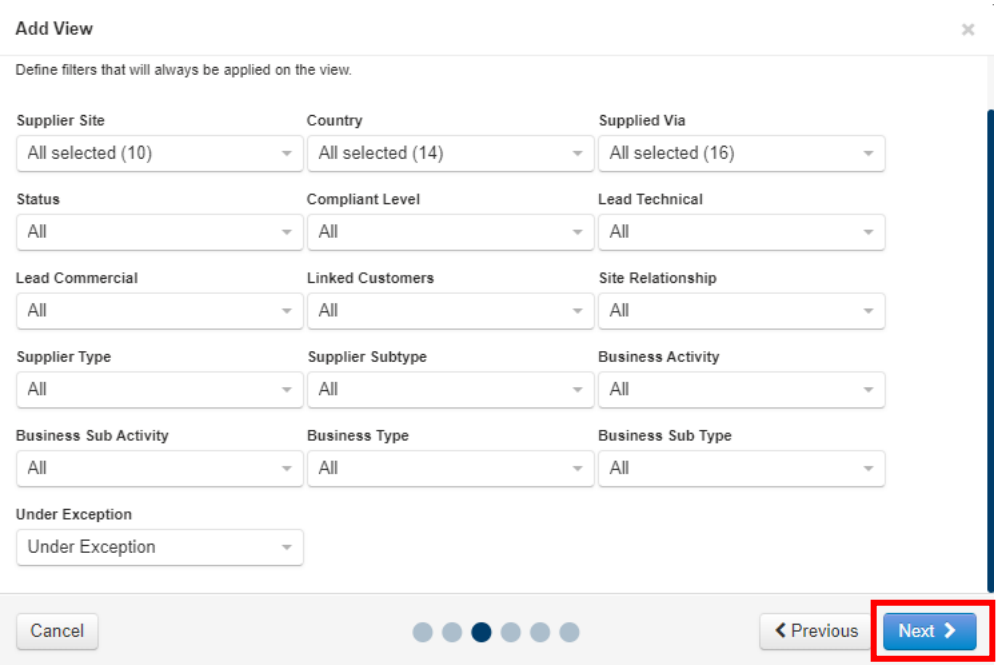
Step 3: Name the view, select **Next**



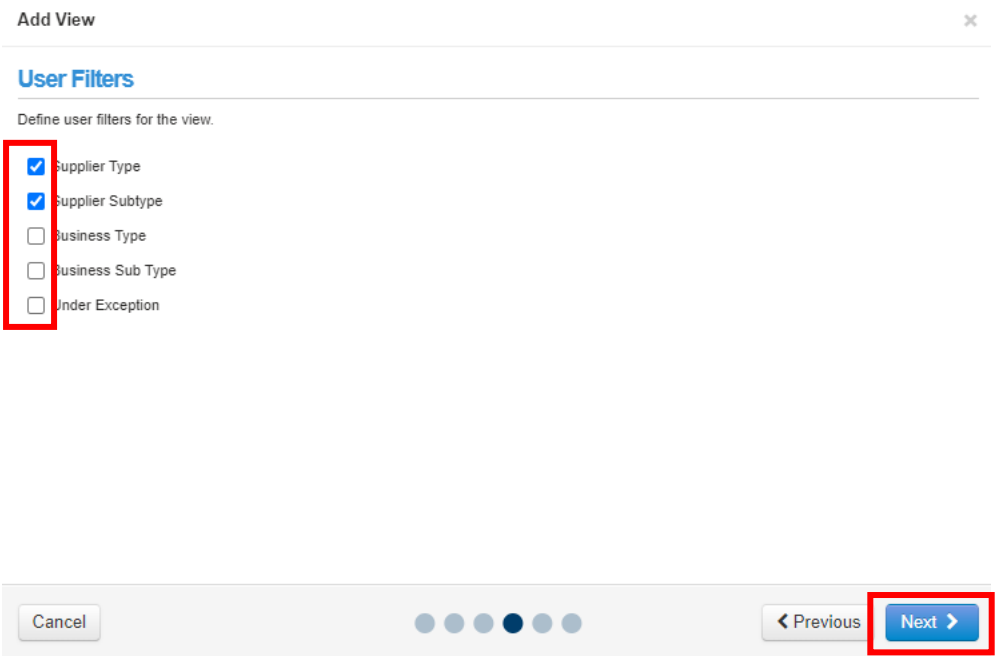
Step 4: Now drag & drop the columns you want to see in your view. When done select **Next**



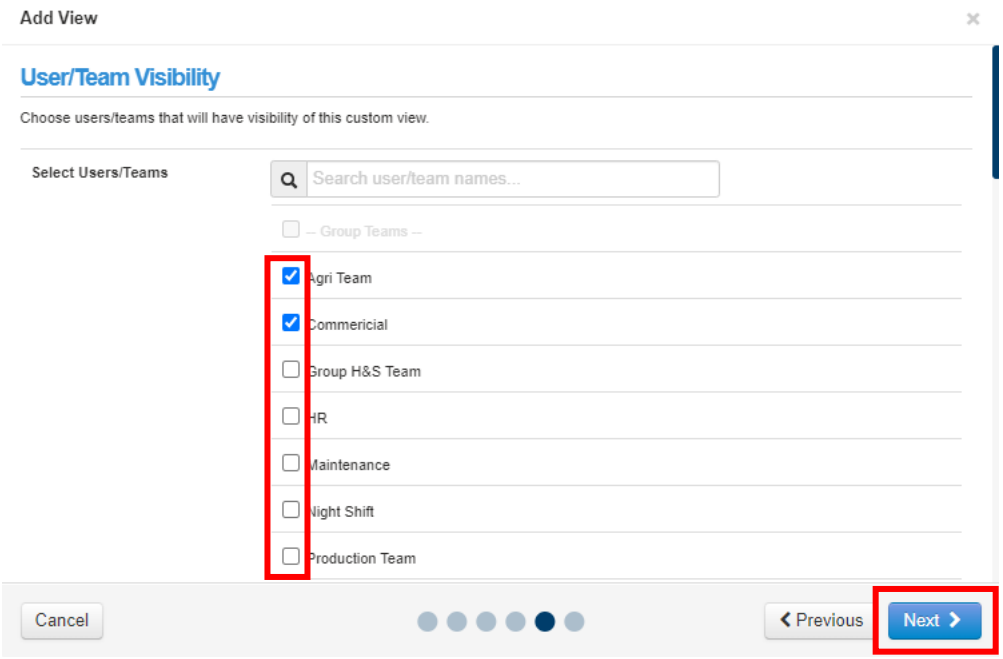
Step 5: Now select **filters** that will always be applied on this view. Select **Next** when done



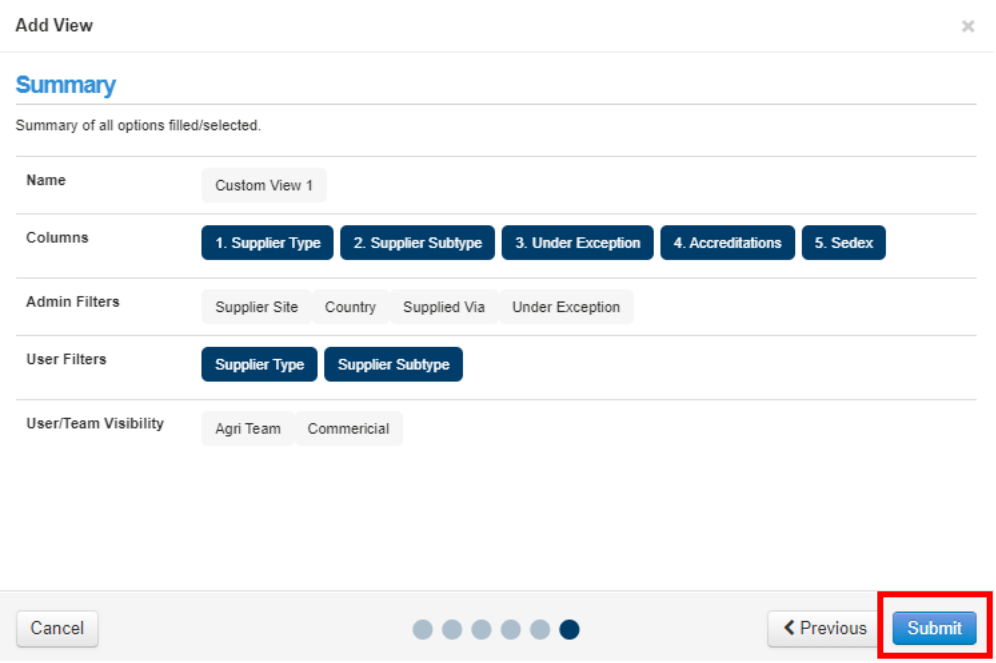
Step 6: Now select **filters** that are specific to you the user. These will only be visible for you. Select **Next** when done



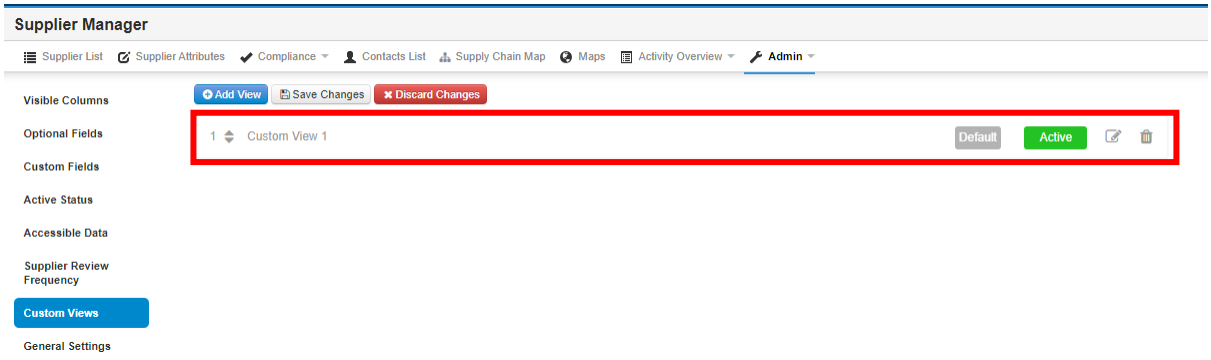
Step 7: Now select the users/teams that will have visibility of this view. Select **Next** when done



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



Step 9: Your custom views will look like this below



Step 10:

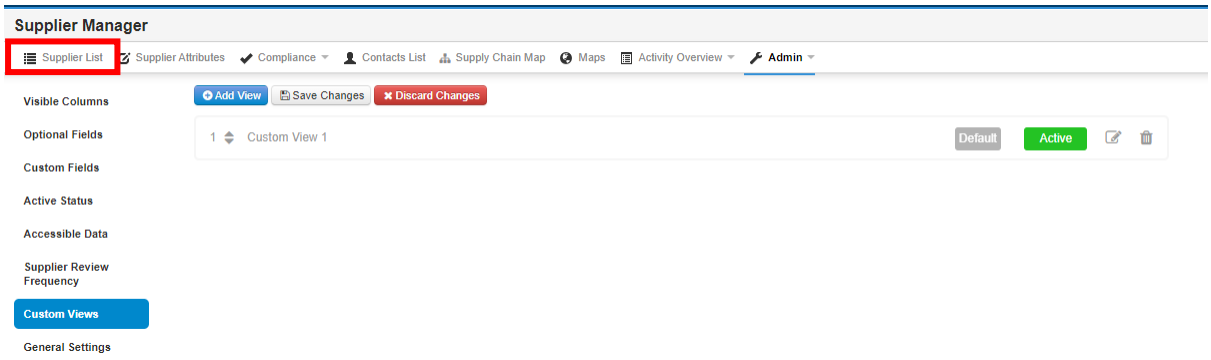
Default: Toggle to set as **Default** view Default

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

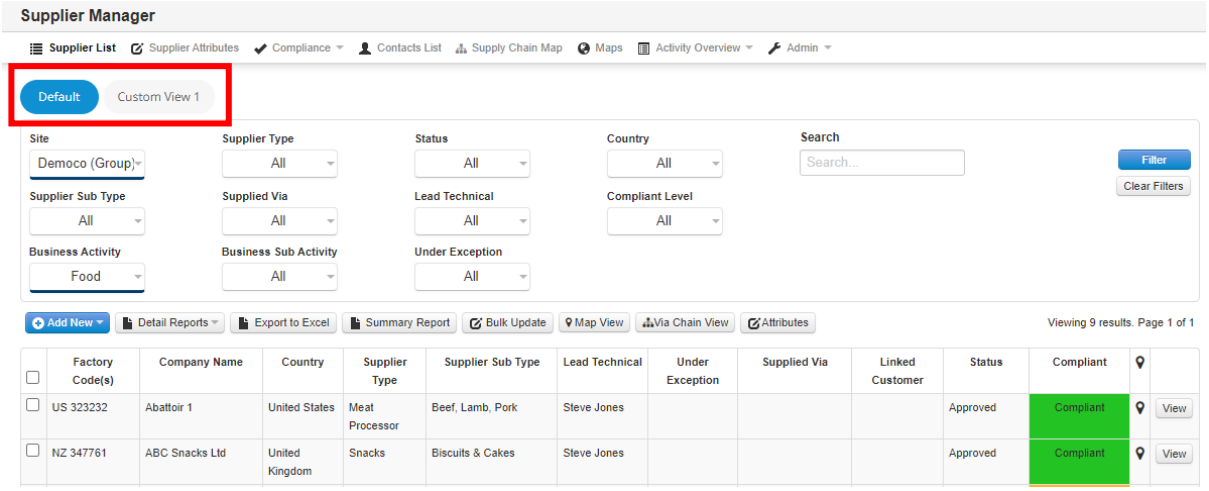
Edit View: To **Edit** select the **Edit** button and follow steps above

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

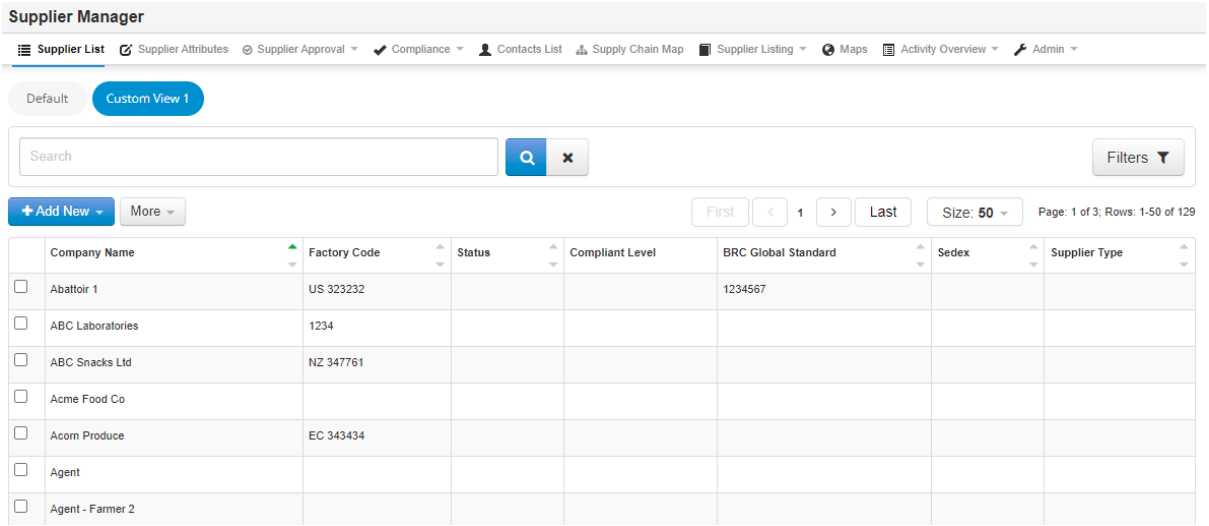
Step 11: Now to see this view work, select **Supplier List**



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



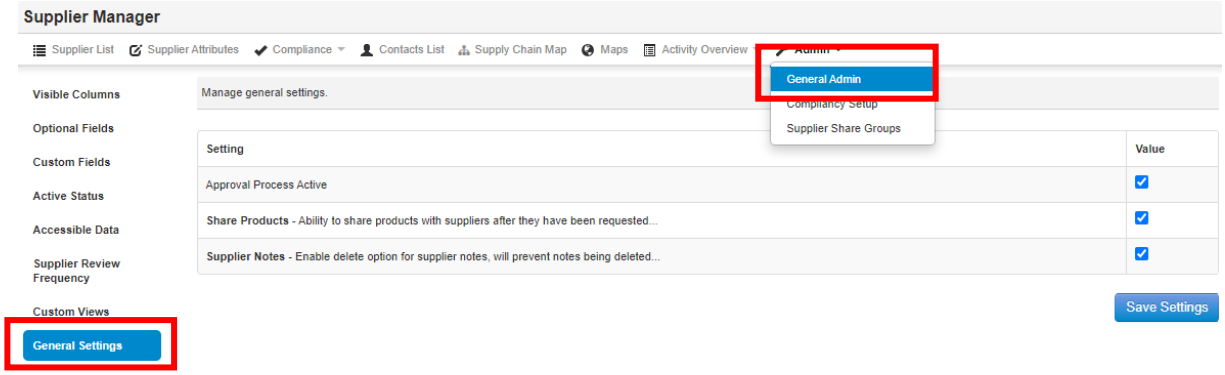
Step 13: See view below



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



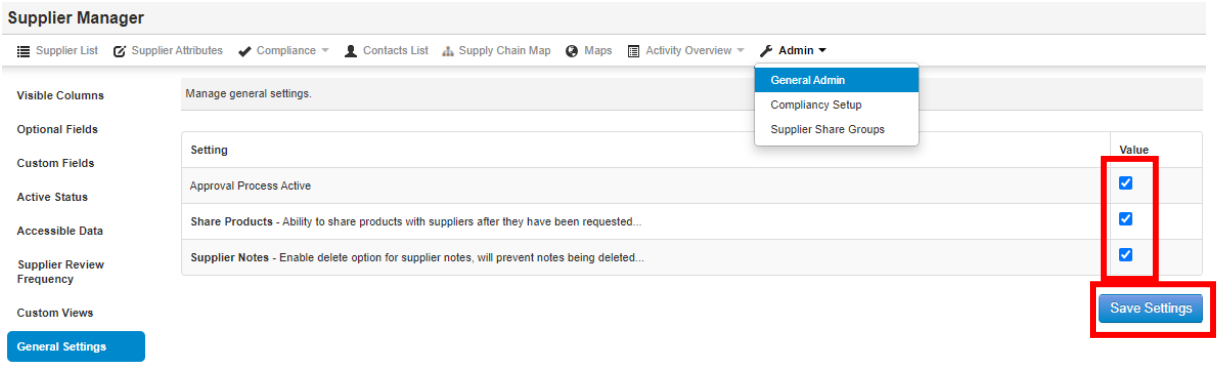
<u>This is something you can do at a later stage and can be setup & amended whenever you want</u>

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

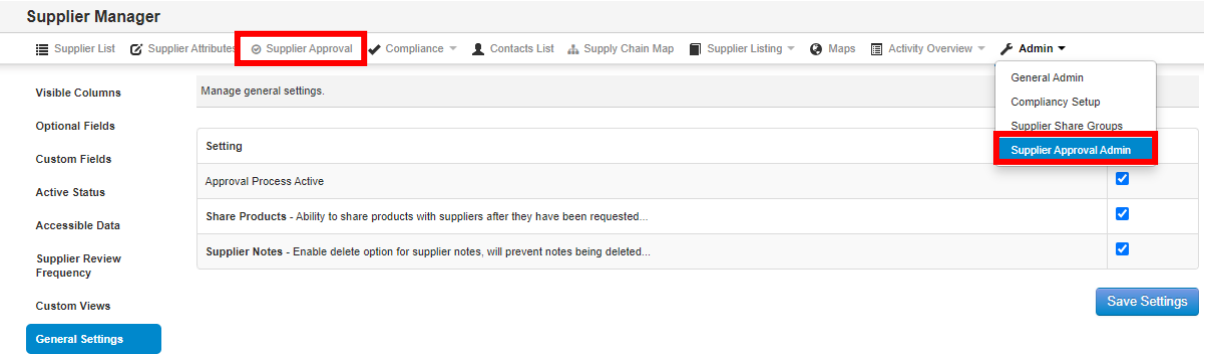
Share Products: Ability to share products with suppliers after they have been requested. When you add a new supplier you can share products & spec templates with them in one go instead of retrospectively doing this. (Will touch on this later in the guide 2.1.1 & 2.1.2) Turn on or off

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 preforming 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

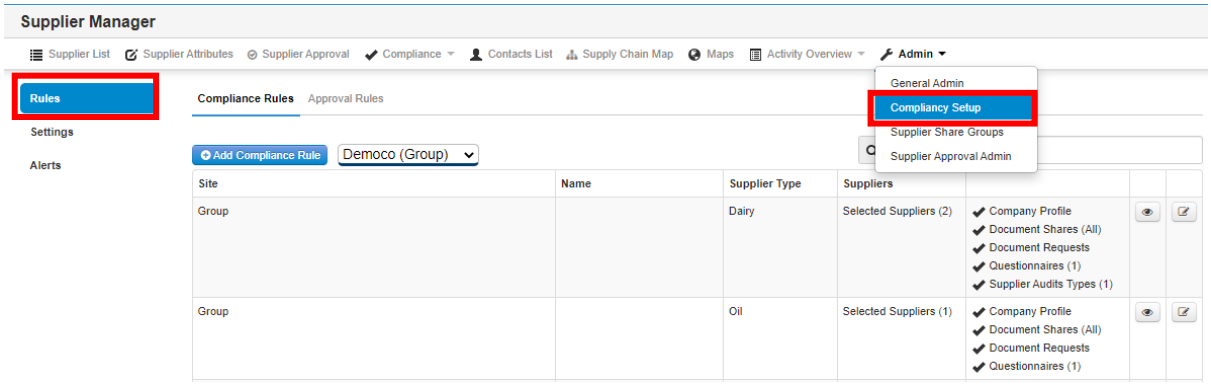
One best way is to setup rules based on the supplier types. Say if you need the same info from Ingredient & Meat & Poultry supplier types select them to be in the rule. We will use this scenario in this guide.

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

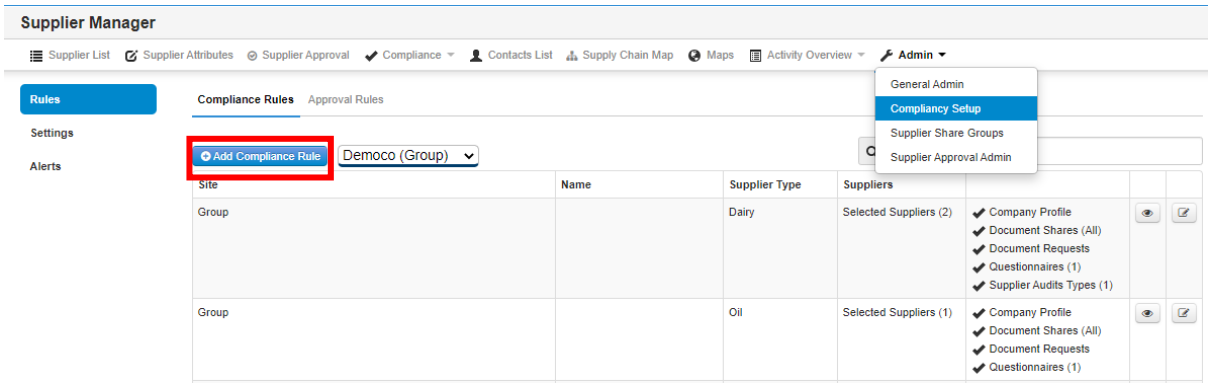
Note: You can only use the compliance types or tools that you have subscribed too in order to use those as an option for Compliance Rules & Supplier Approval Process

1.2.1 COMPLIANCE RULES – HOW TO CREATE & SETUP

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



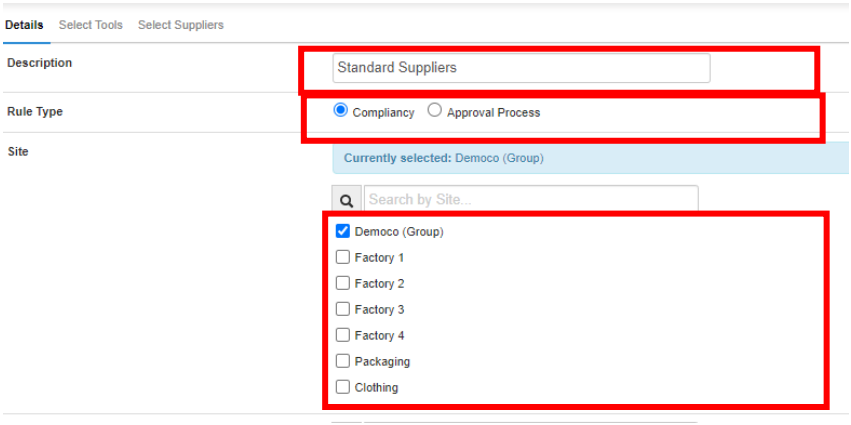
Step 2: Select Add **Compliance Rules**



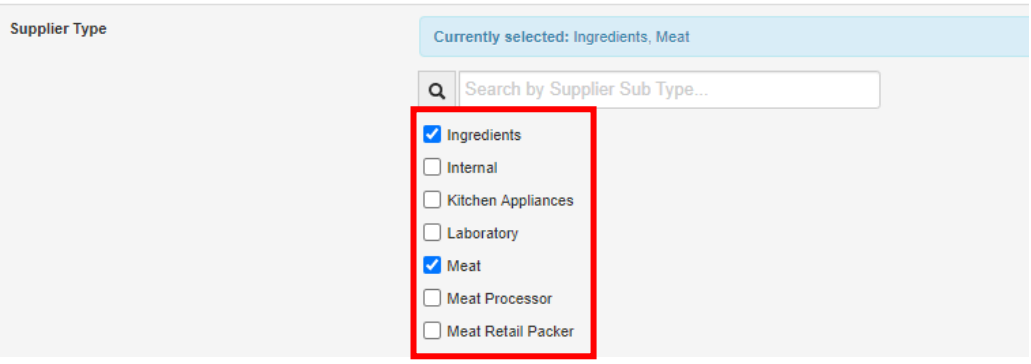
Step 3:

- Give a **Description** of the rule.
- Then select **Rule Type** as **Compliancy**. 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



- Now select the **Supplier Type**

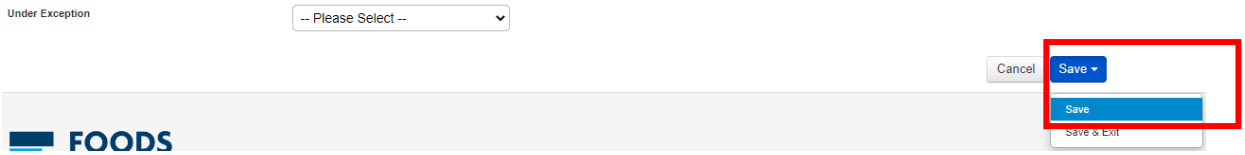


Step 4: As you can see you can select Sub type, Business activity, Business Sub Activity & Country to really specify your rule further.

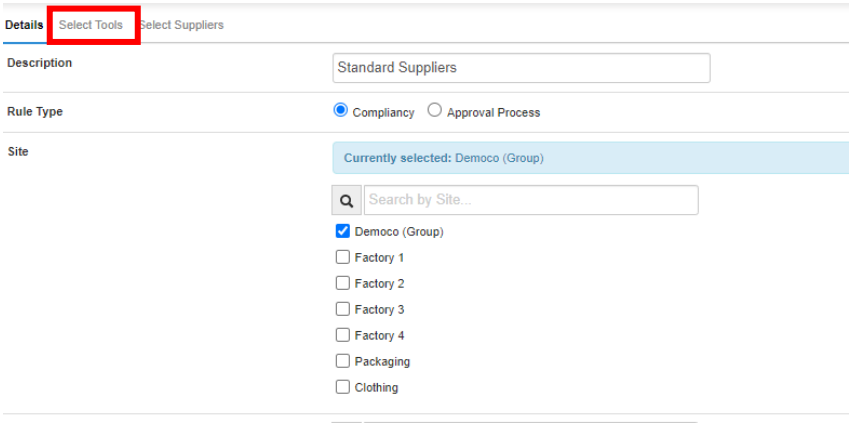
Step 5: On Supplier Status, select the statuses that this will be active or apply on. So really a compliance rule only needs to apply when a supplier is **Approved**, **In Progress**, **Requires Review**. It doesn't need to apply when a supplier is delisted.

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.

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

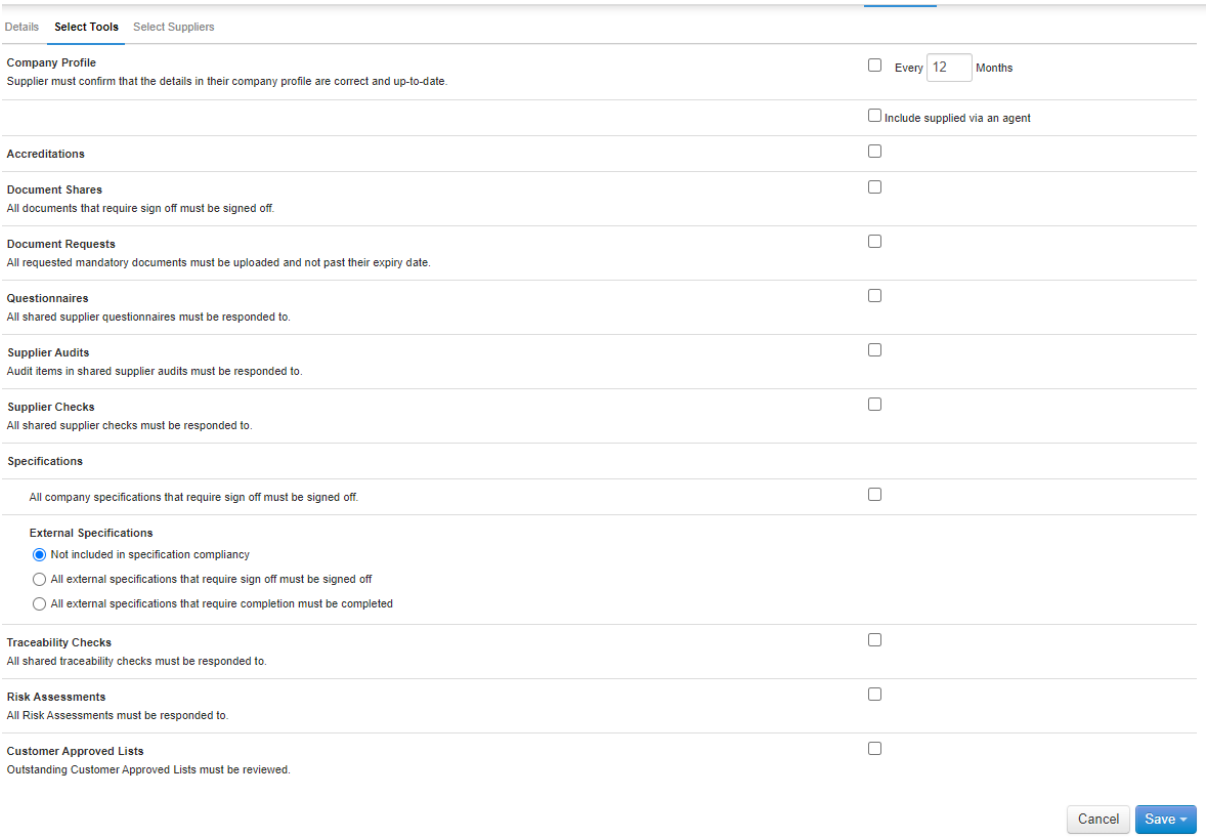


Step 8: Now select, **Select Tools**



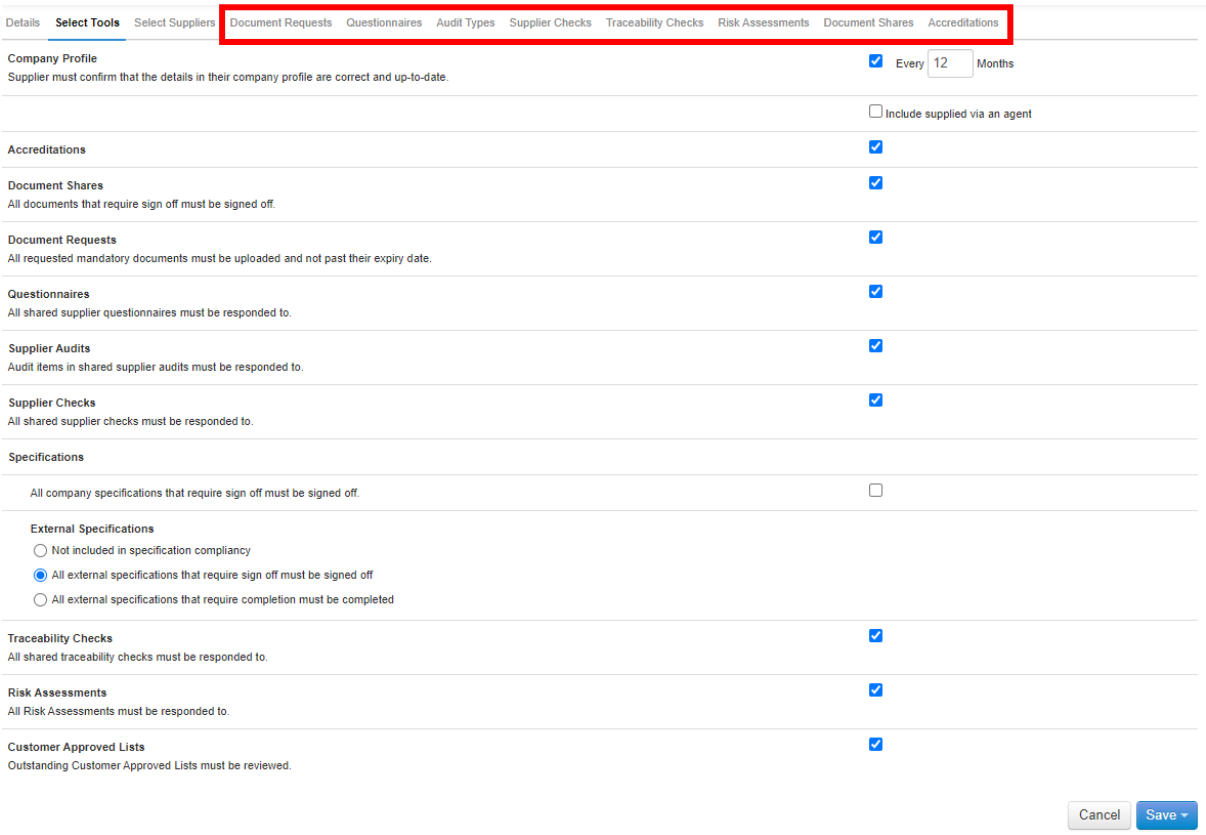
Step 9: Now select the tools that you want to make up your rule.

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.



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 selecing 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 theirt profile as you are dealing directly with the agent.



(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.

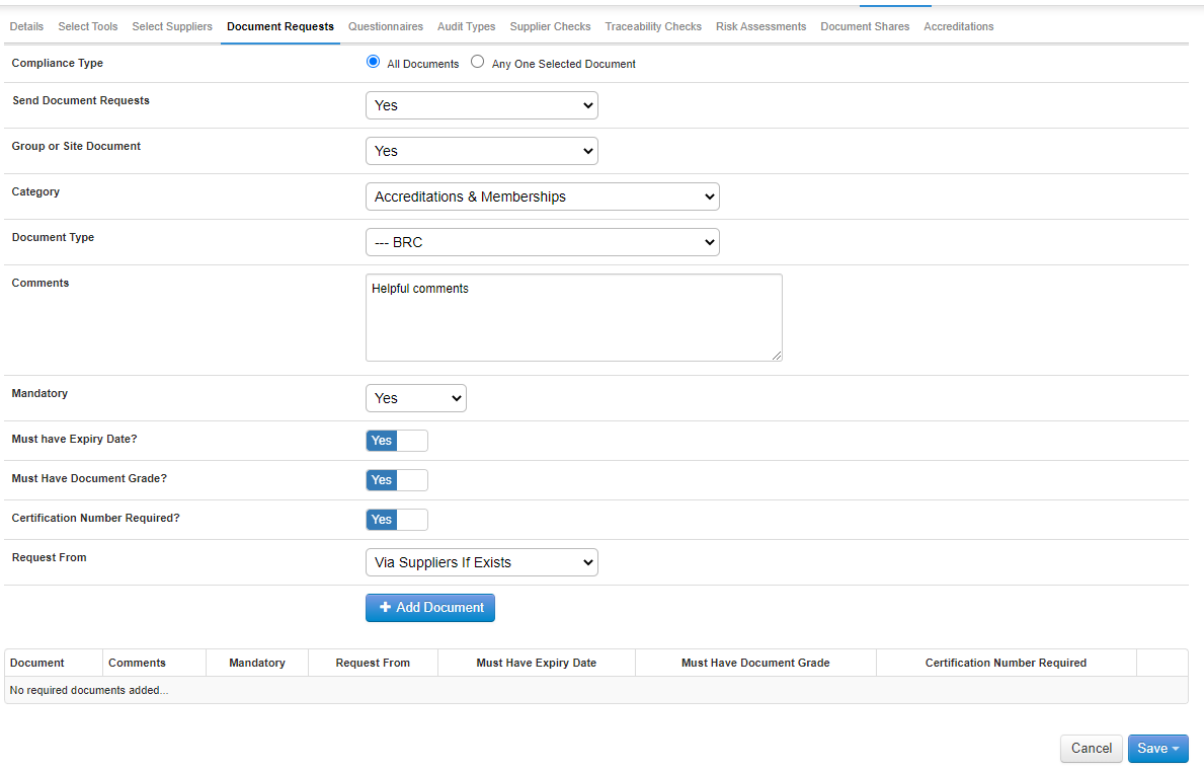
1.2.1.1 Document Requests – How to setup & select

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.

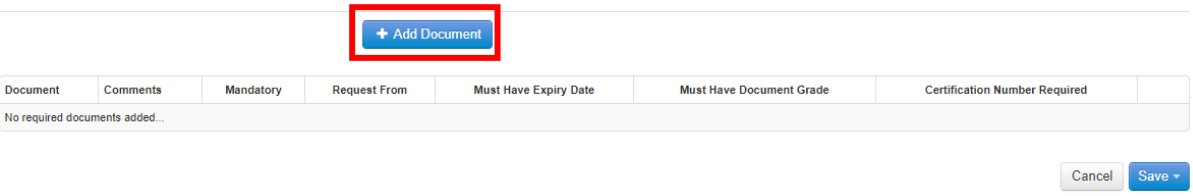
Step 1:

- **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)

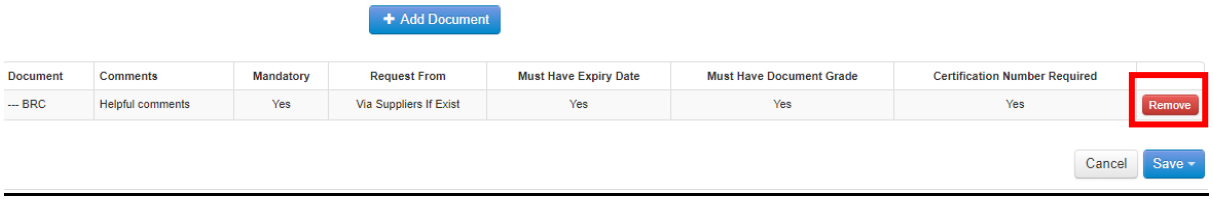


Step 2: Now select **Add Document**



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

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

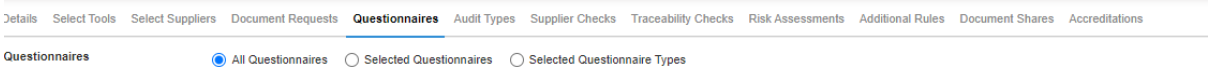


1.2.1.2 Questionnaires – How to setup & select

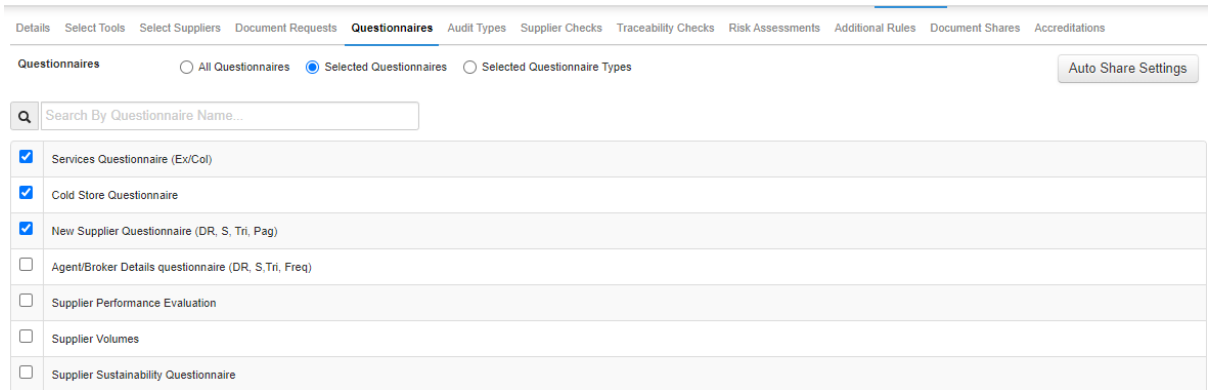
This is where you setup & select the questionnaires you want your suppliers to complete based on this rule.

Step 1:

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

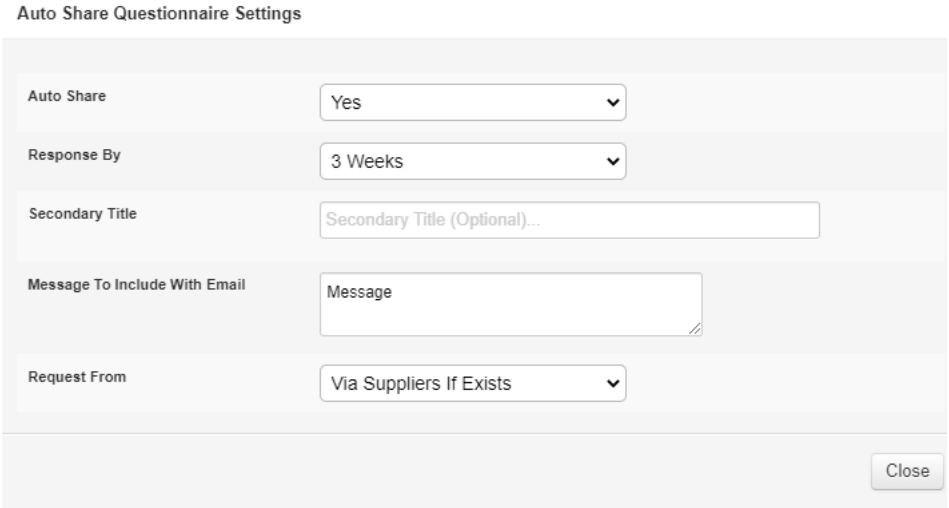


Selected Questionnaires: Select the questionnaires that will form part of the rule. Select **Save** when done

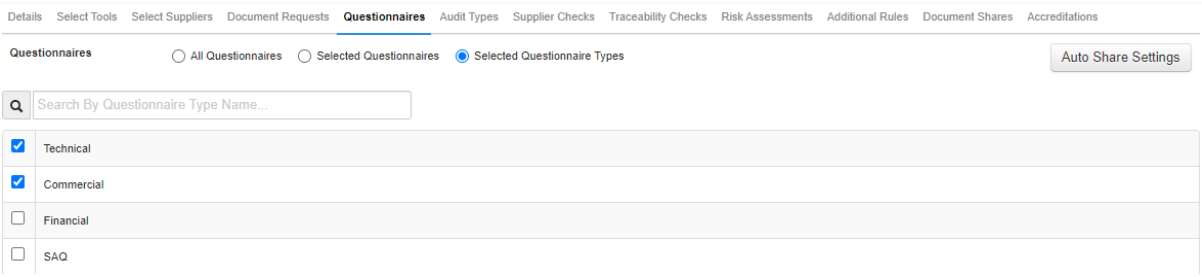


Auto Share: Selecting auto share allows you to set the sharing of these questionnaires automatically.

- ***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)

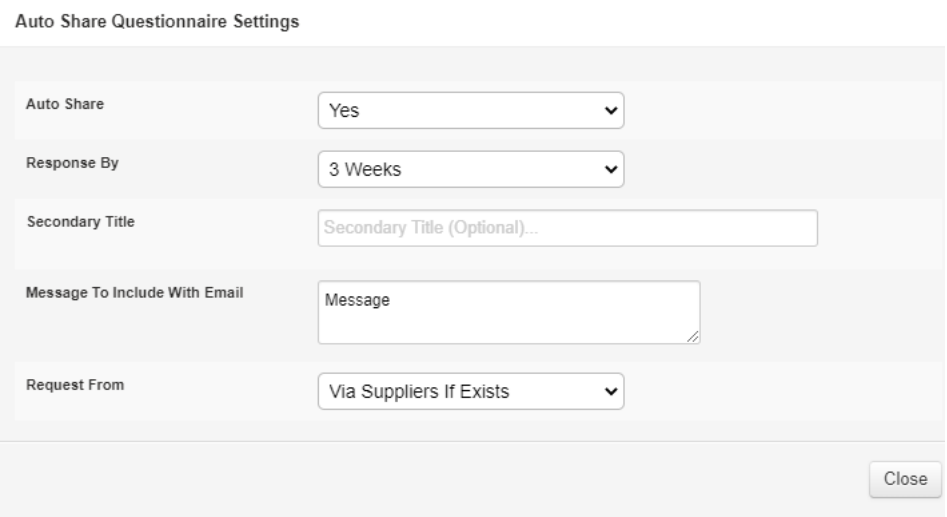


Selected Questionnaire Types: Select the questionnaire types that will form part of the rule. Select **Save** when done



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

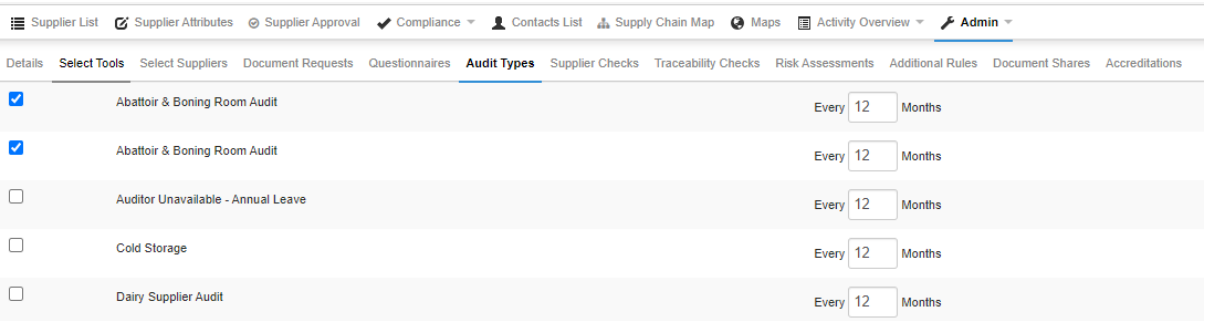
- ***Auto Share:*** Turn on or Off
- ***Response By:*** Supplier needs to respond by what you set here
- ***Secondary Title****:* Add secondary title if needed
- ***Message:*** Include a message if needed
- ***Request from:*** Choose what is appropriate for your rule
  Supplier: Will request documents 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)



1.2.1.3 Audits – How to setup & select

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

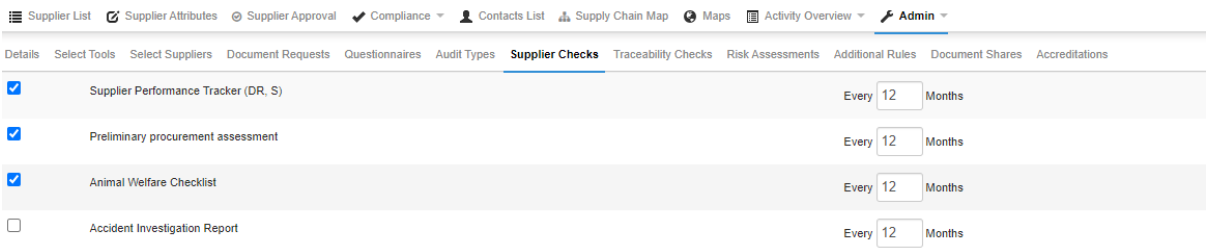
Step 1: Select the audit types that form part of your rule and set a frequency for them to be done. Select **Save** when done



1.2.1.4 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.

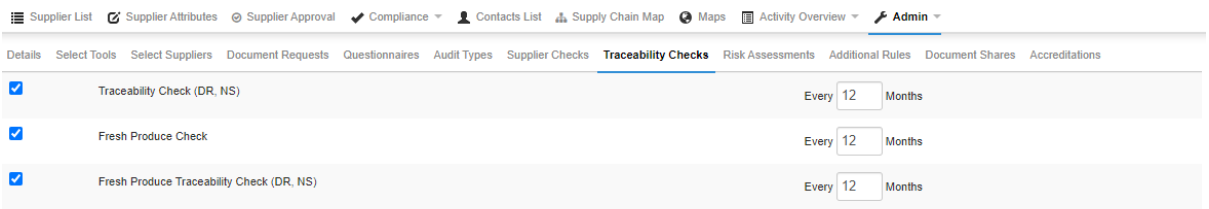
Step 1: Select the supplier checks that form part of your rule and set a frequency for them to be done. Select **Save** when done



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



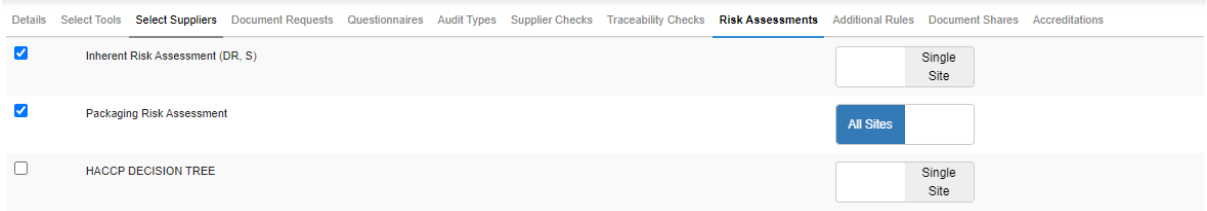
1.2.1.6 Risk Assessments – How to setup & select

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.

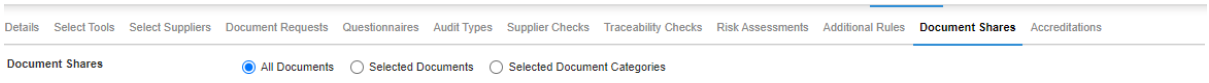


1.2.1.7 Document Shares – How to setup & select

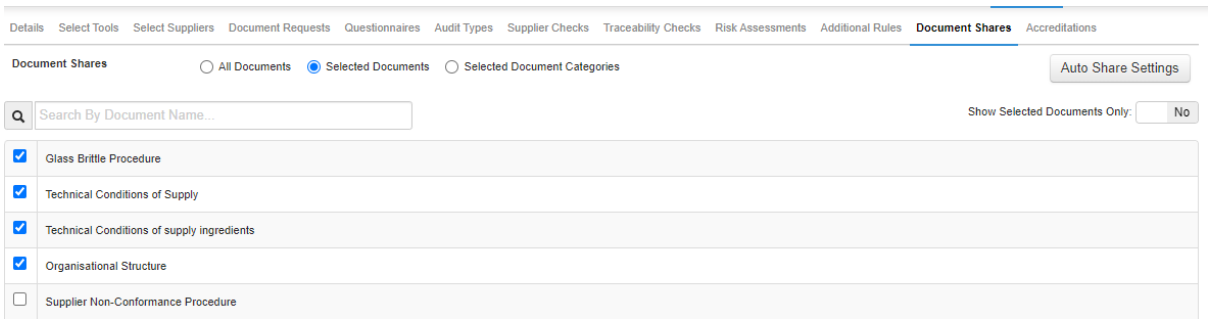
This is where you setup & select the documents you want to share with your suppliers to sign off on, based on this rule.

Step 1:

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

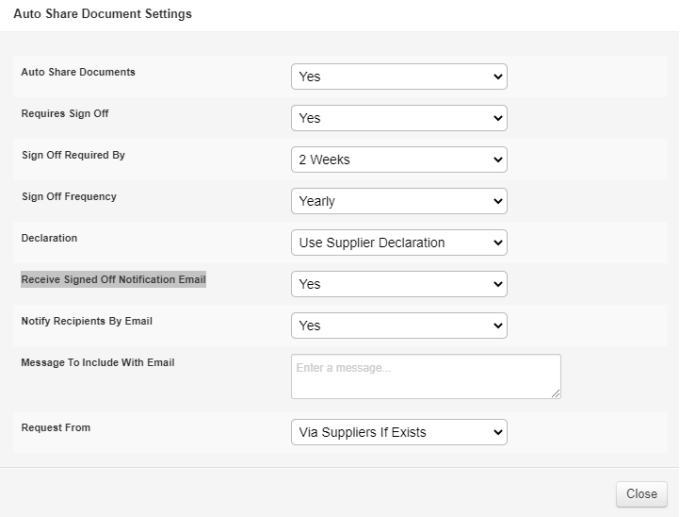


Selected Documents: Select the documents that will form part of the rule. Select **Save** when done

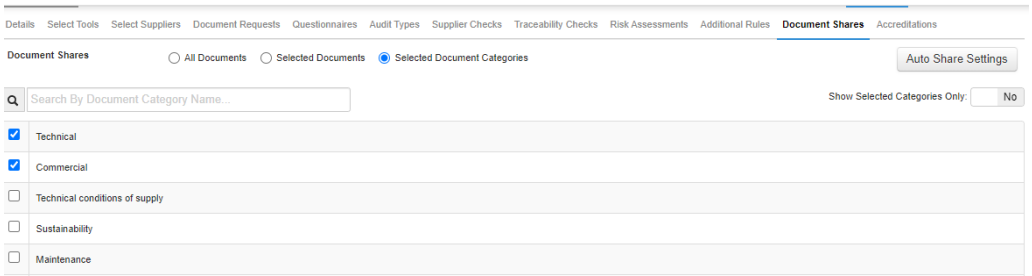


Auto Share: Selecting auto share, allows you to set the sharing of these documents automatically.

- ***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)

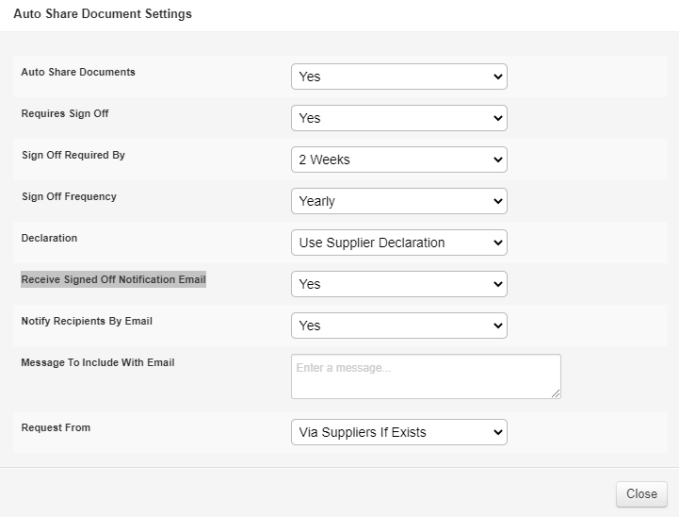


Selected Document Categories: Select the document categories that will form part of the rule. Select **Save** when done



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)

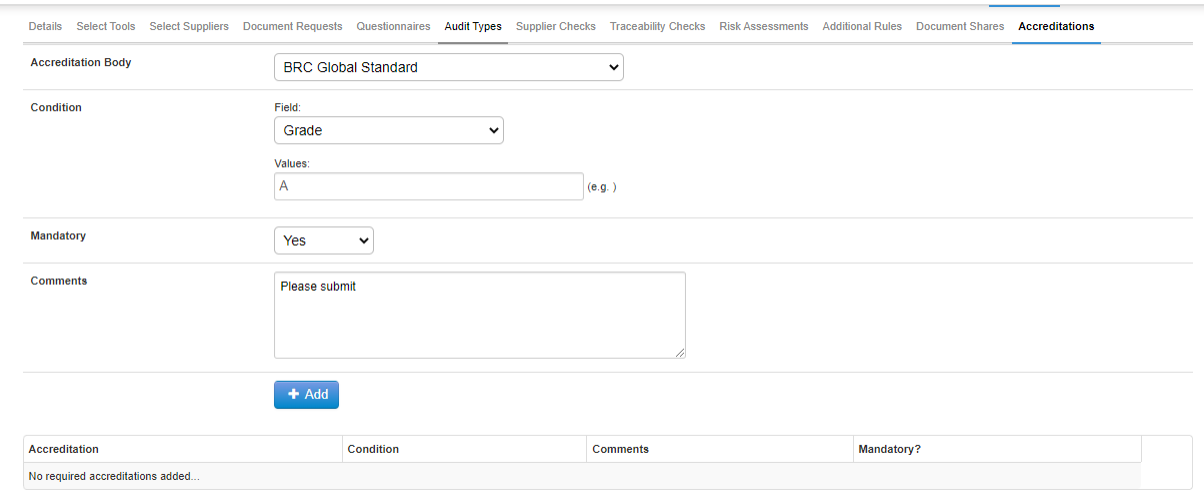


1.2.1.8 Accreditations – How to setup & select

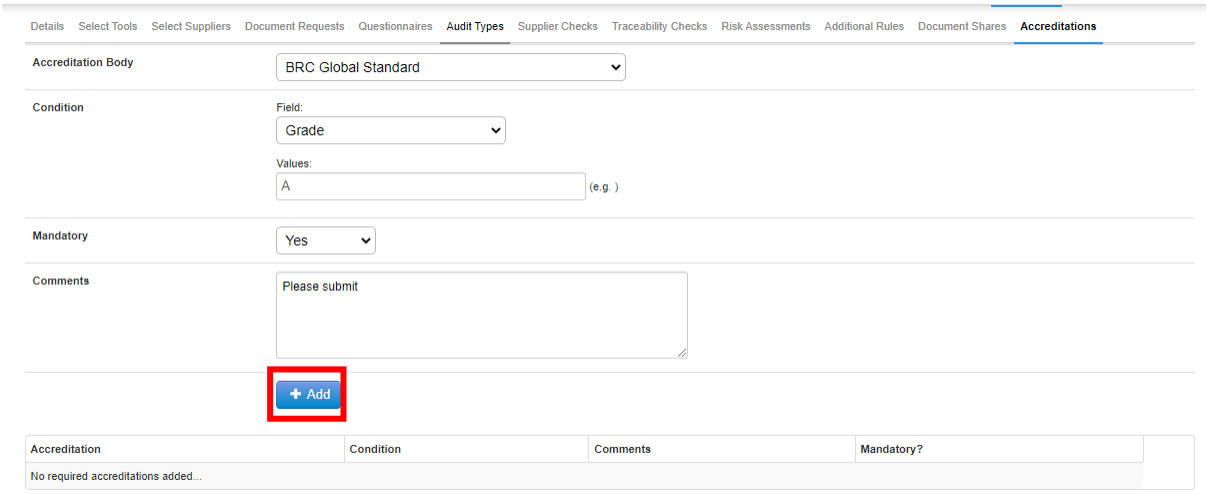
This is where you setup & select the accreditations you want to request from your suppliers to confirm that they have, based on this rule.

Step 1:

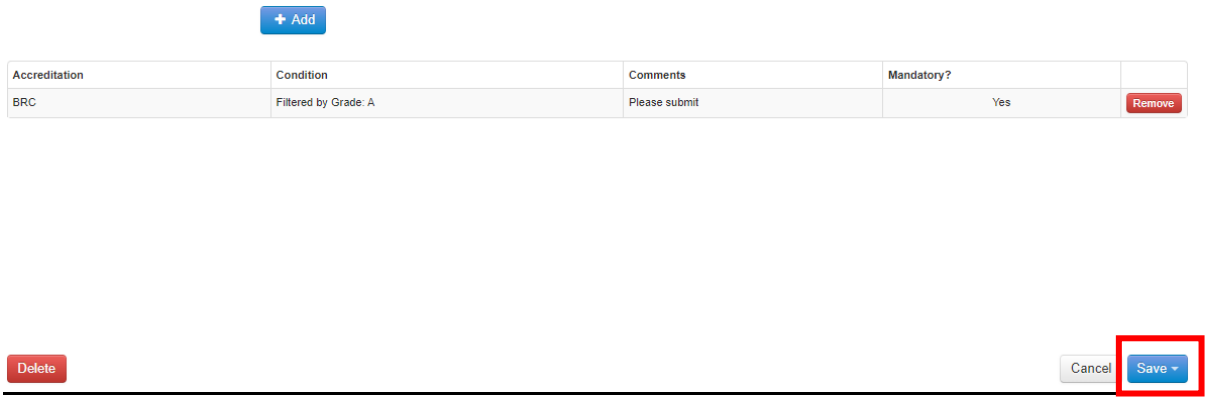
Accreditation Body: Select the accreditation body from the dropdown
Condition: Select is the rule based on Grade or Expiry date is valid
Mandatory: Yes or no – This means they must enter and is a required field
Comments: Add any requesting comments



Step 2: When done select **Add**

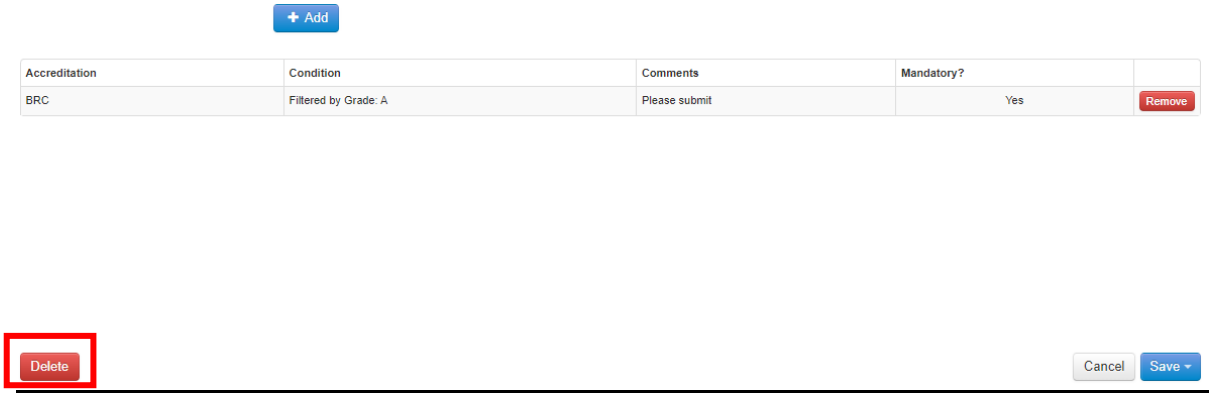


Step 3: Your accreditation is now pre-loaded. And looks like this below. Follow steps above to add further accreditations to this rule. Select **Save** when done



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

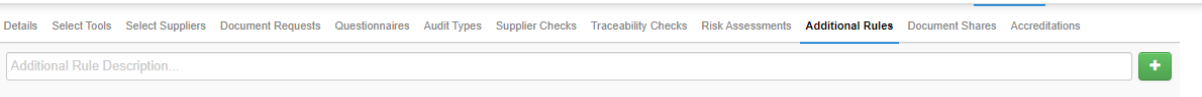
Step 5: At any stage you want to delete this part of your rule, select **Delete**



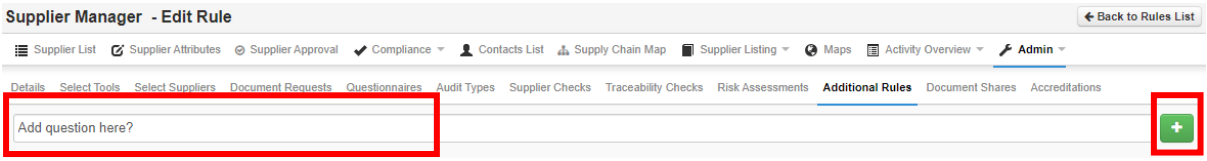
1.2.1.9 Additional Rules – How to create & setup

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.

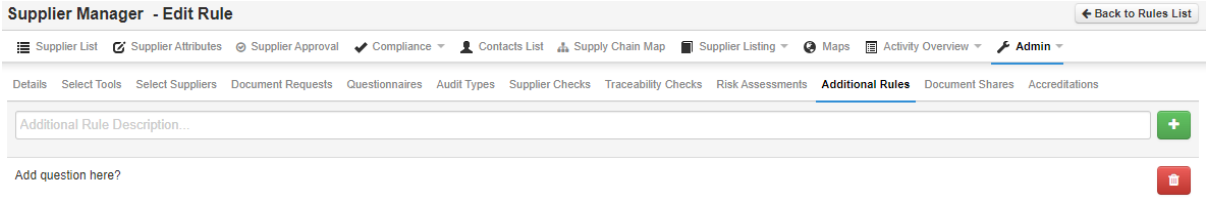
Step 1: An **Additional Rules** tab will appear. This allows you to add customisable questions that you can create that you might ask your suppliers. Select **Additional Rules**



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

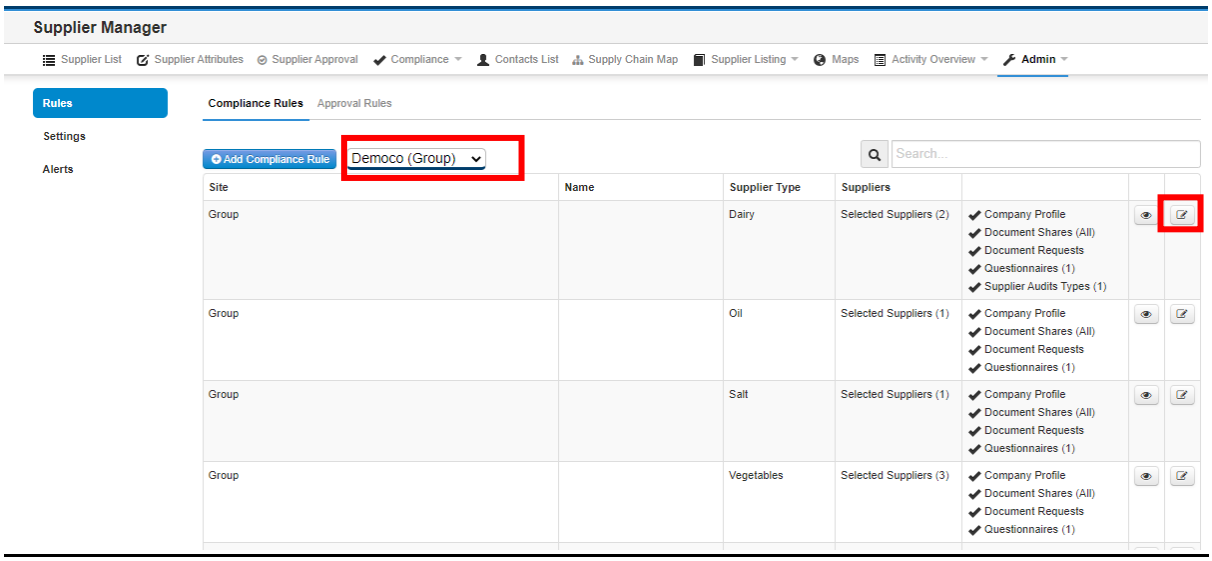


Step 3: When you are done your added rules will look like this below. You can delete and add new ones using the steps above. Select **Save** when done

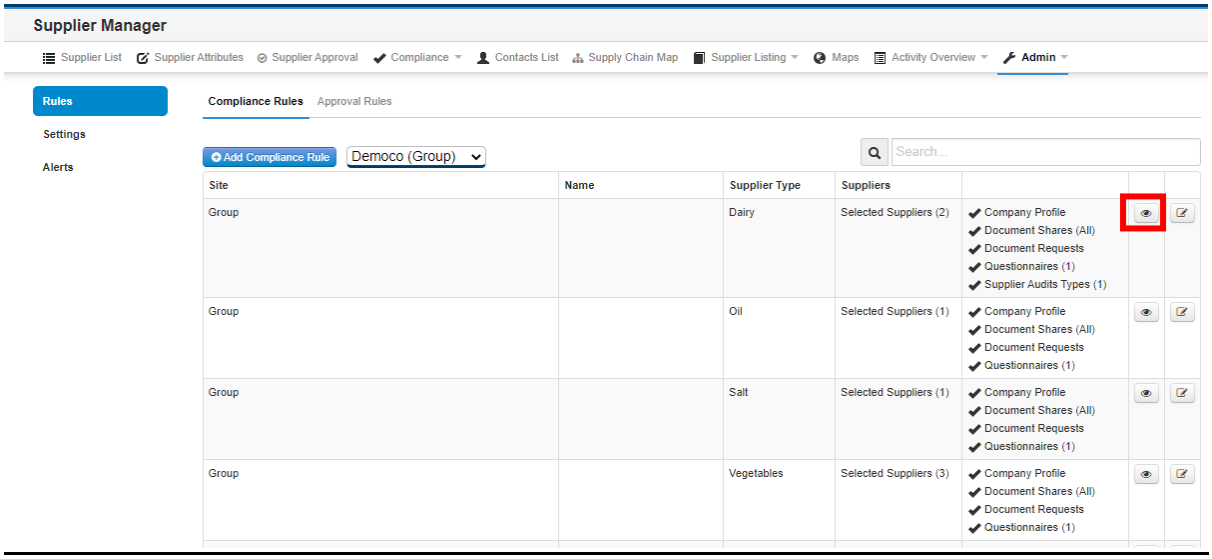


1.2.1.10 Completed Compliance Rules

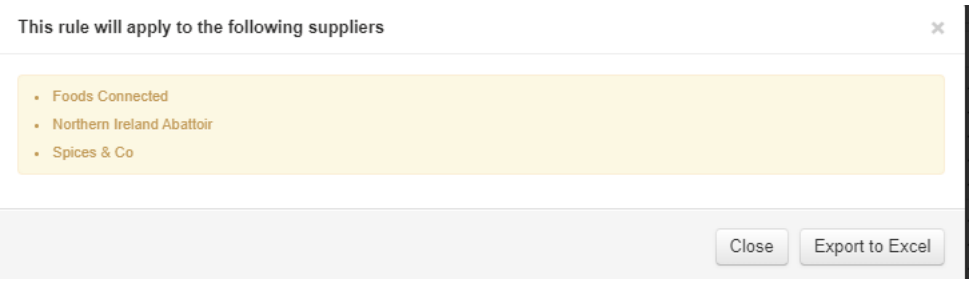
Step 1: Once you have done adding all your **Compliance Rules** & **Additional Rules** your table will look like below. You can edit these at any time. Click on the edit button beside each rule and follow steps above to change. You can also filter your rules by site as you may have different rules setup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



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.



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 preforming Suppliers. Supplier Approval Process will be triggered when you add a new supplier

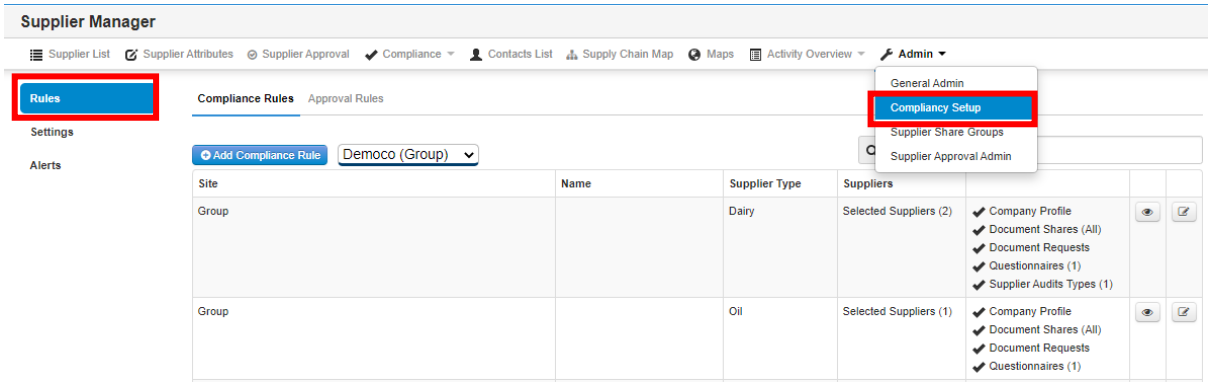
Rules can be made as specific as needed or more overarching. The more specific you make it the less automatic the rules become

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.

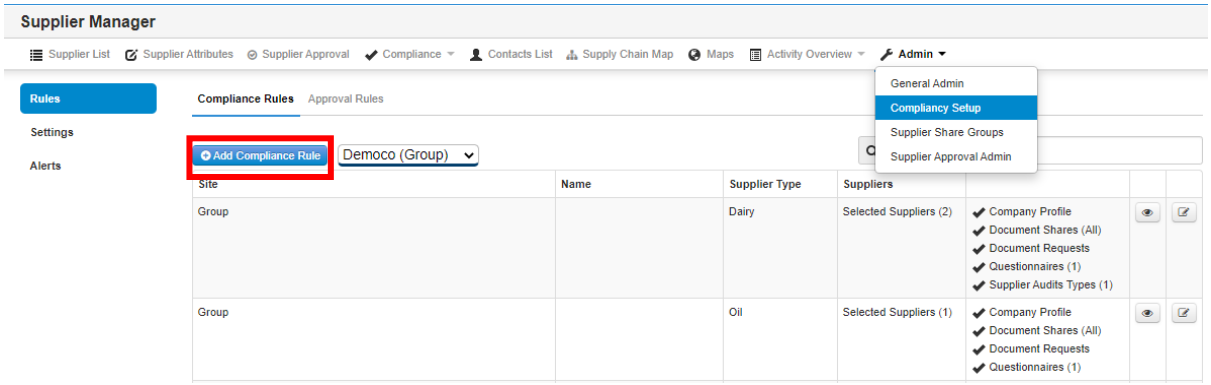
If you need to discuss rules further, please speak to the custom support team.

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**



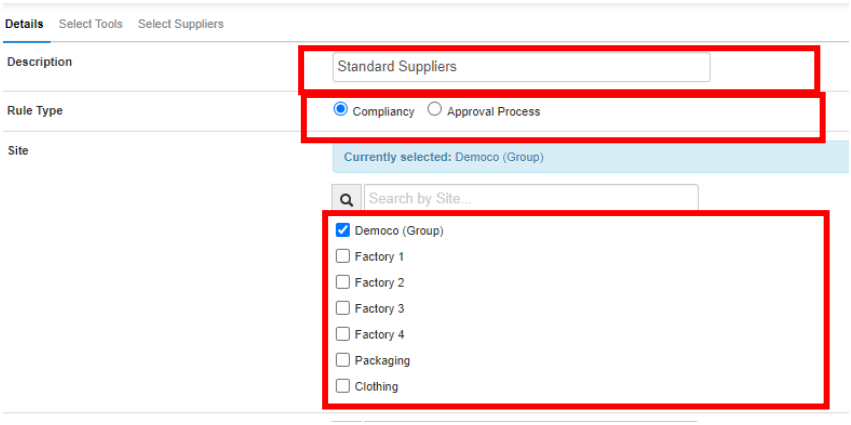
Step 2: Select Add **Compliance Rules**



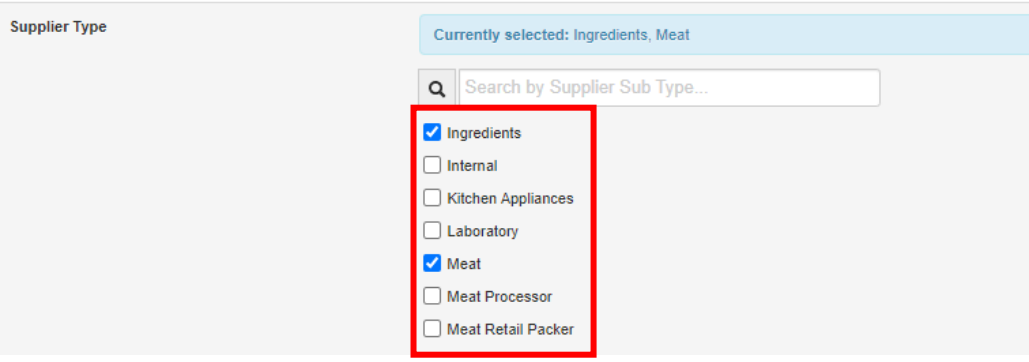
Step 3:

- Give a **Description** of the rule.
- Then select **Rule Type** as **Compliancy**. 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



- Now select the **Supplier Type**

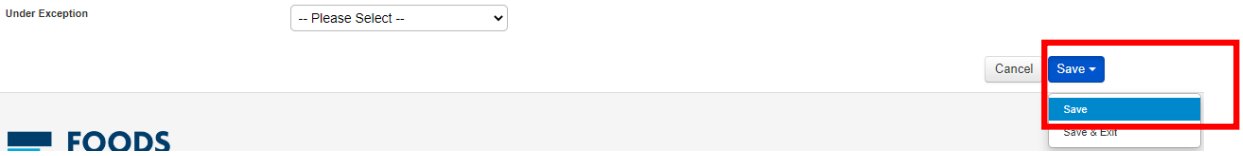


Step 4: As you can see you can select Sub type, Business activity, Business Sub Activity & Country to really specify your rule further.

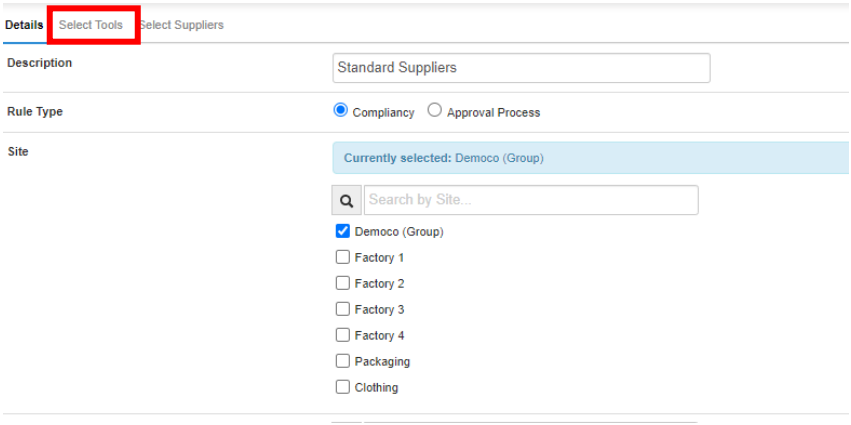
Step 5: On Supplier Status, select the statuses that this will be active or apply on. So really a compliance rule only needs to apply when a supplier is **Approved**, **In Progress**, **Requires Review**. It doesn't need to apply when a supplier is delisted.

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.

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

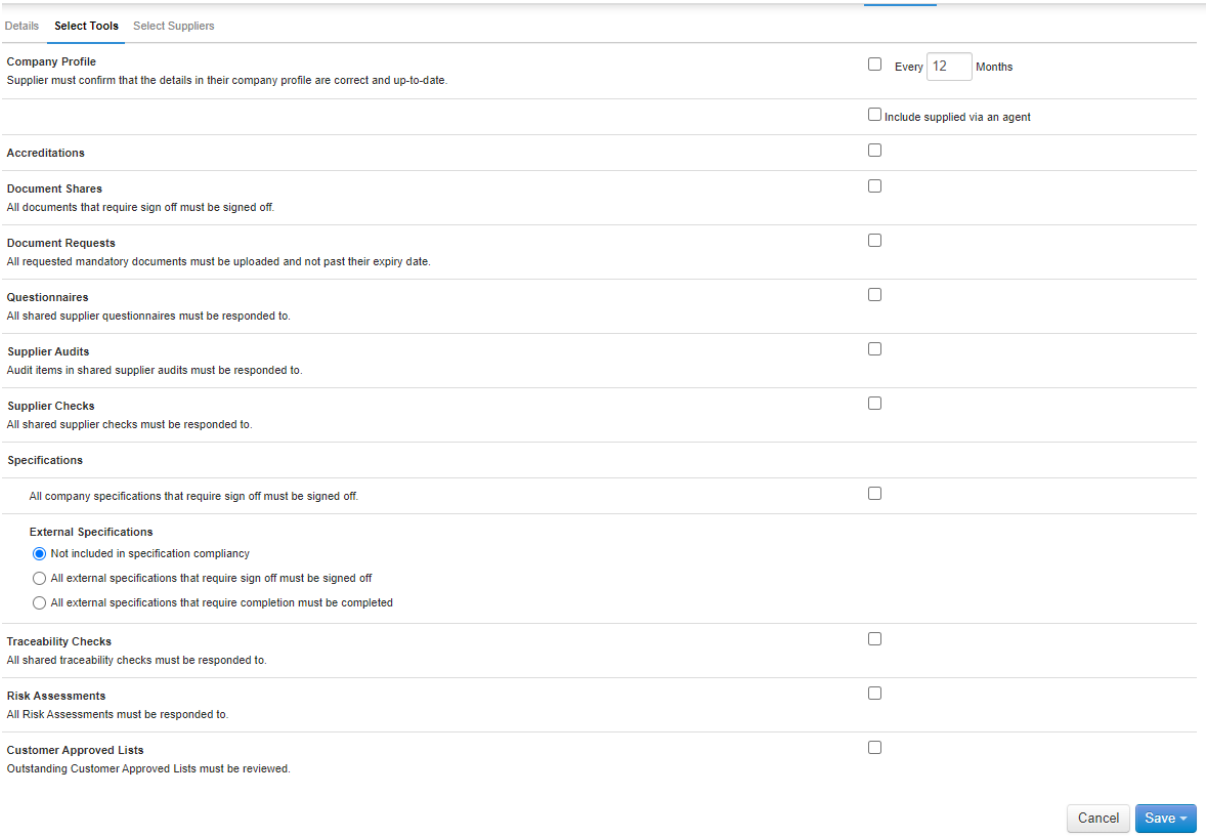


Step 8: Now select, **Select Tools**



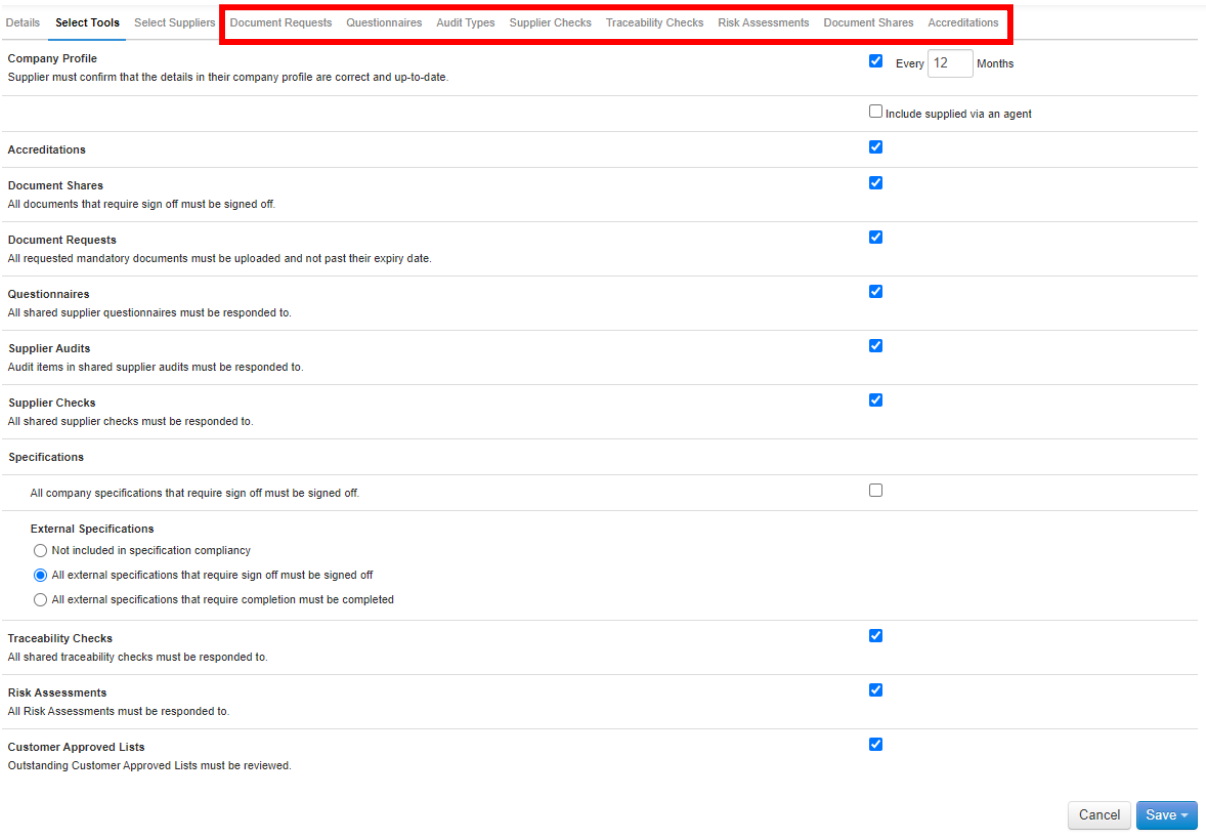
Step 9: Now select the tools that you want to make up your rule.

<u>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.</u>



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 selecing 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 theirt profile as you are dealing directly with the agent.



(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.

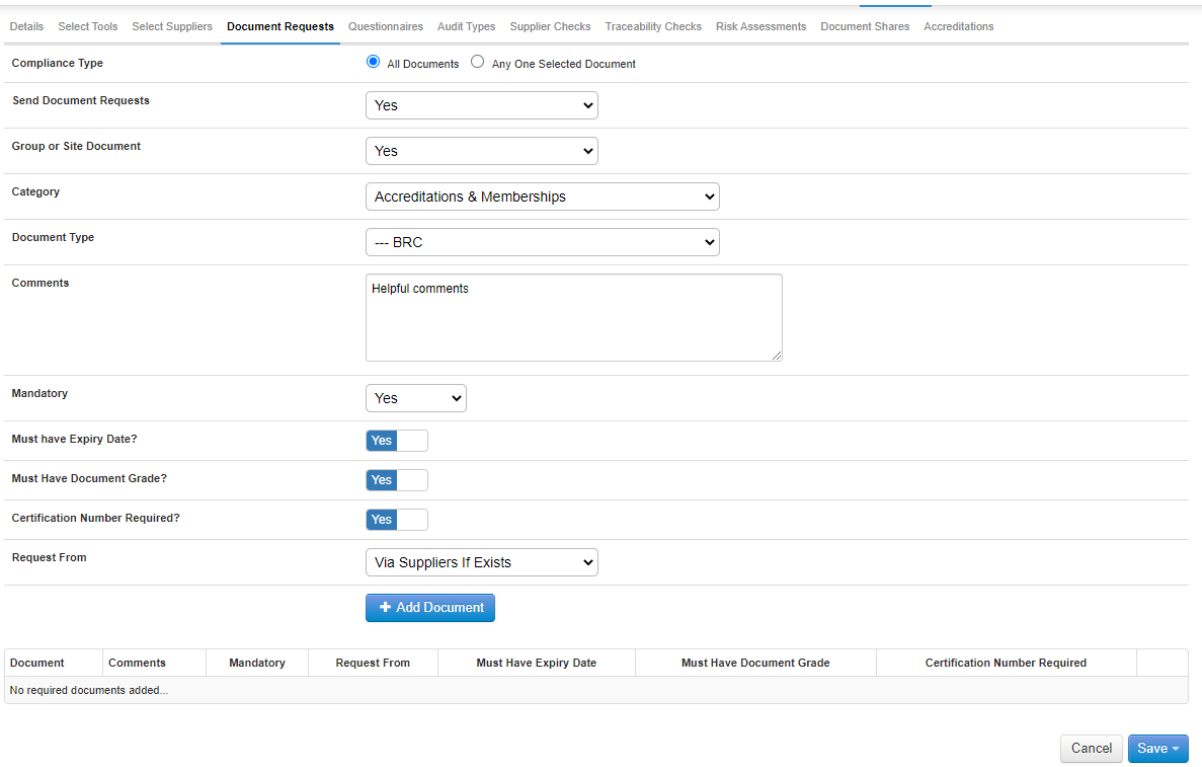
In this guide we will look at all the tools that can be set as compliance rule.

1.2.2.1 Document Requests – How to setup & select

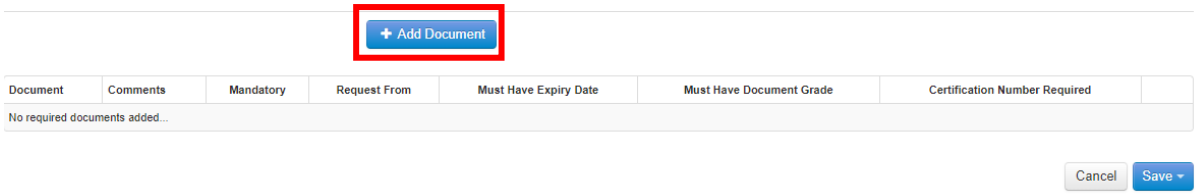
This is where you setup & select the documents you will need from your suppliers based on this rule. Documents like BRC certs, Allergen control procedures etc.

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)



Step 2: Now select **Add Document**



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

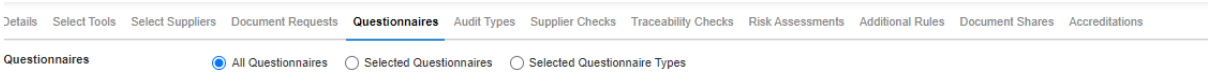
Step 4: At any stage you need to remove this document select **Remove**.

1.2.2.2 Questionnaires – How to setup & select

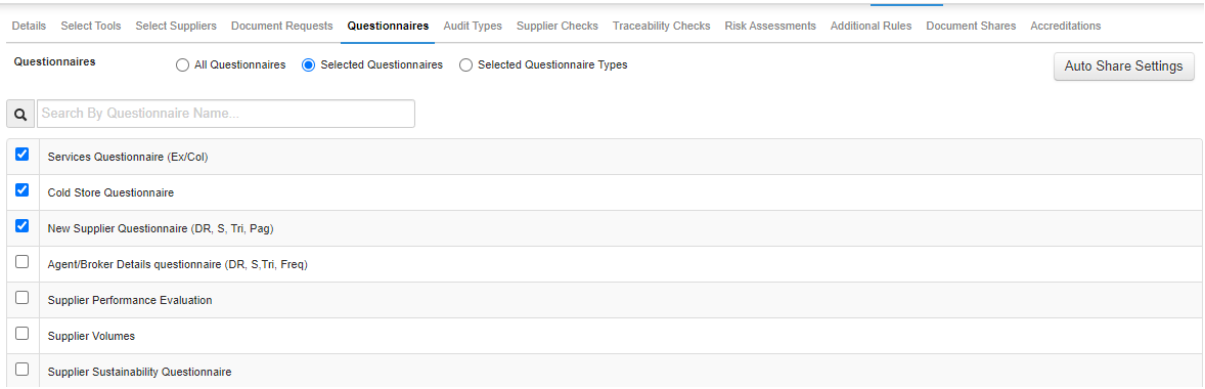
This is where you setup & select the questionnaires you want your suppliers to complete based on this rule.

Step 1:

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

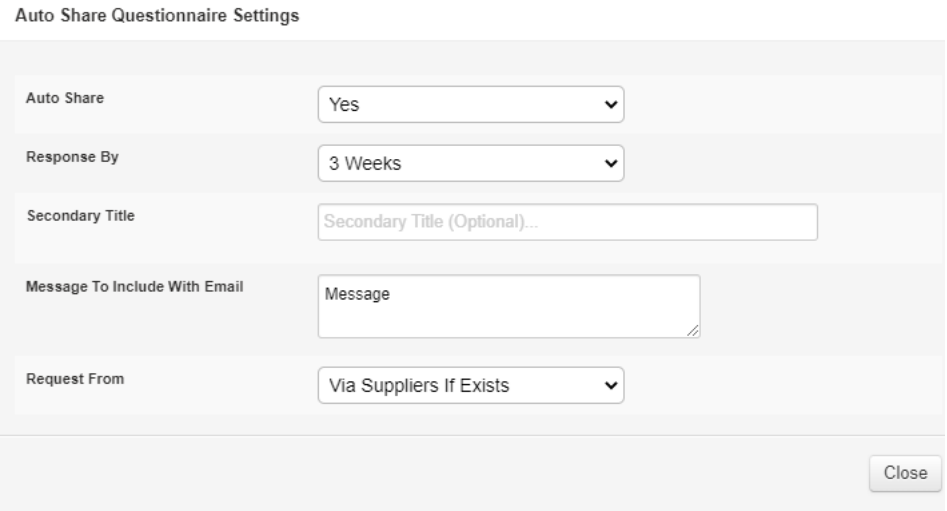


Selected Questionnaires: Select the questionnaires that will form part of the rule. Select **Save** when done

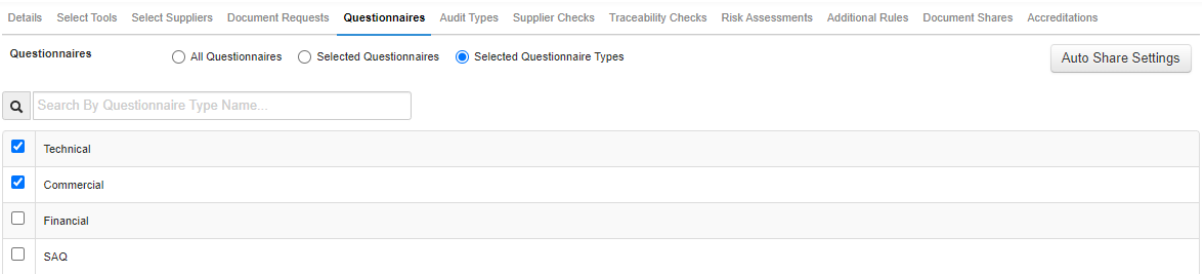


Auto Share: Selecting auto share allows you to set the sharing of these questionnaires automatically.

- ***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)

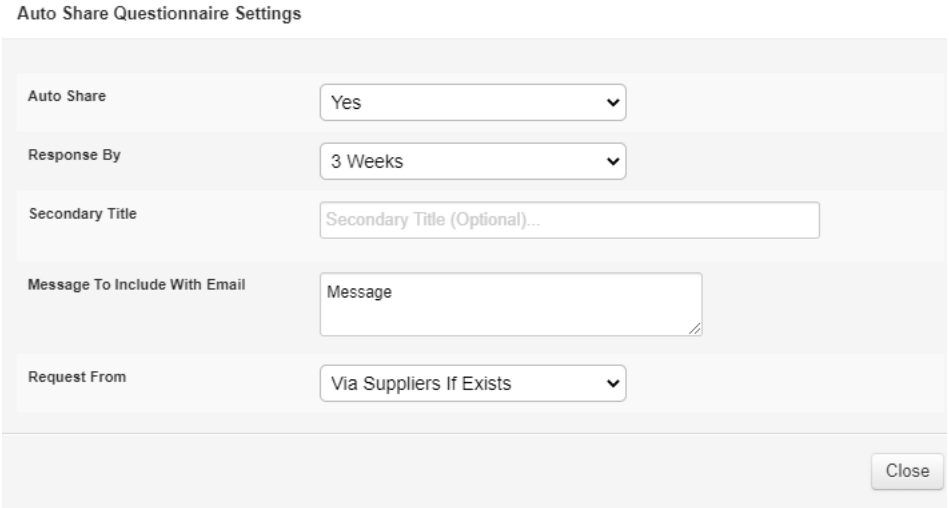


Selected Questionnaire Types: Select the questionnaire types that will form part of the rule. Select **Save** when done



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

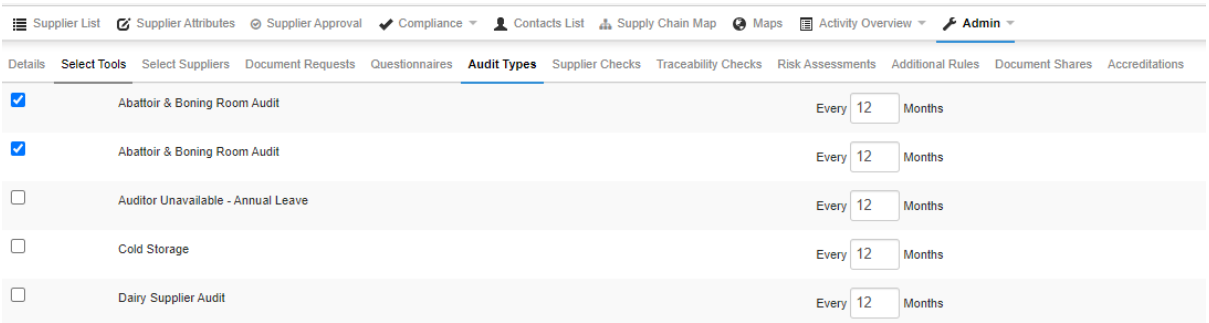
- ***Auto Share:*** Turn on or Off
- ***Response By:*** Supplier needs to respond by what you set here
- ***Secondary Title****:* Add secondary title if needed
- ***Message:*** Include a message if needed
- ***Request from:*** Choose what is appropriate for your rule
  Supplier: Will request documents 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)



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.

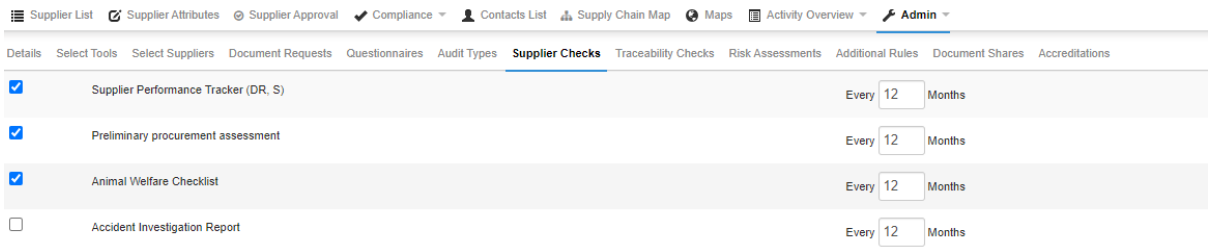
Step 1: Select the audit types that form part of your rule and set a frequency for them to be done. Select **Save** when done



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.

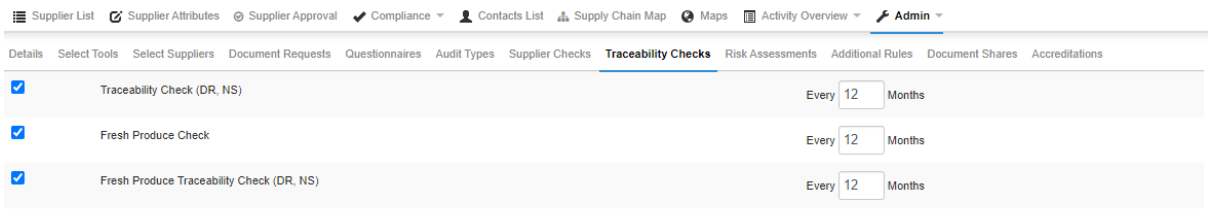
Step 1: Select the supplier checks that form part of your rule and set a frequency for them to be done. Select **Save** when done



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



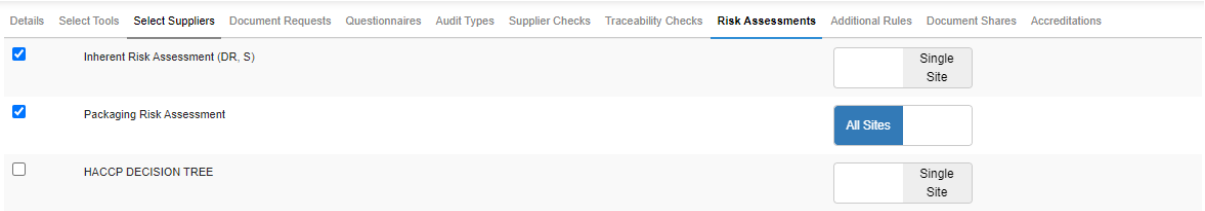
1.2.2.6 Risk Assessments – How to setup & select

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.

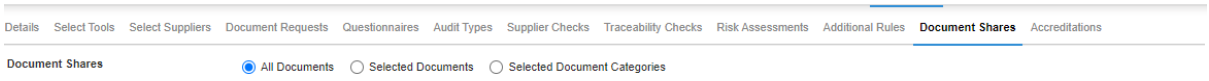


1.2.2.7 Document Shares – How to setup & select

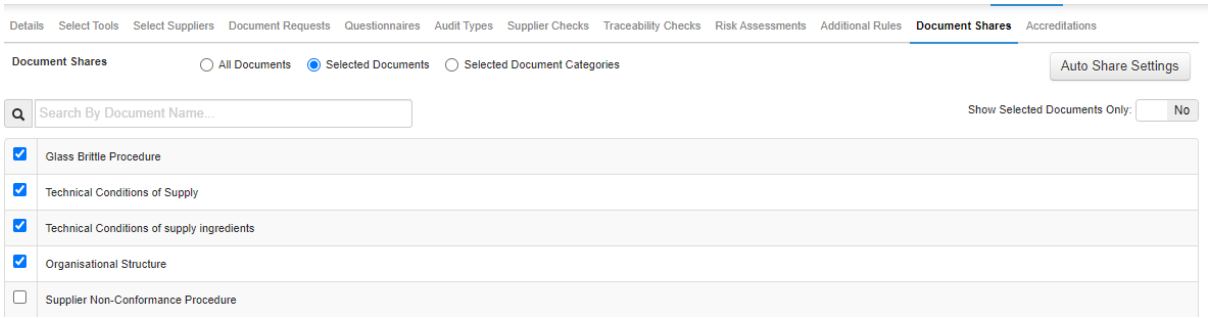
This is where you setup & select the documents you want to share with your suppliers to sign off on, based on this rule.

Step 1:

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



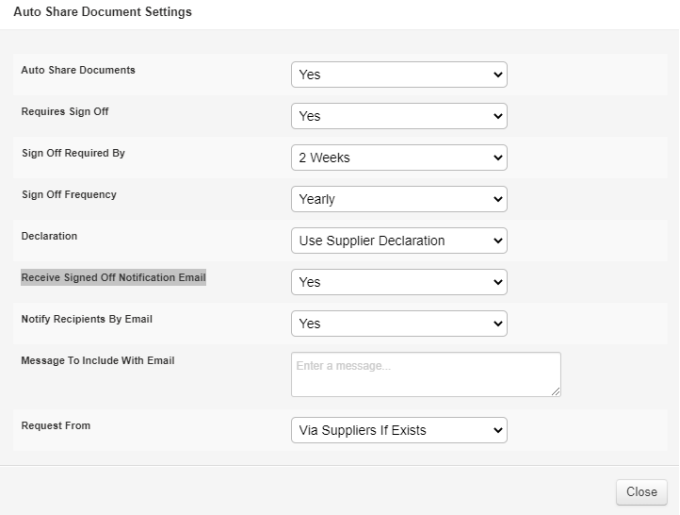
Selected Documents: Select the documents that will form part of the rule. Select **Save** when done



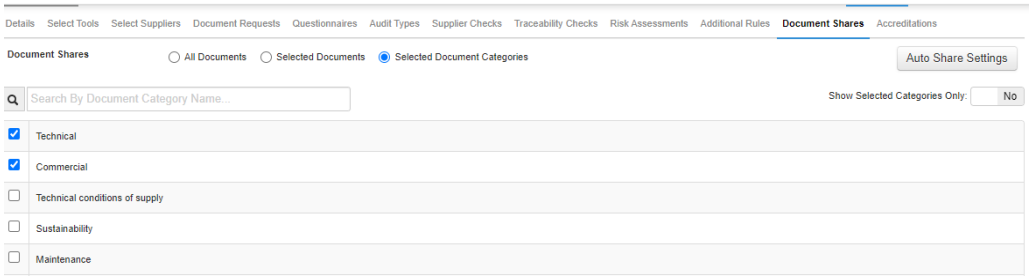
Auto Share: Selecting auto share, allows you to set the sharing of these documents automatically.

- ***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)



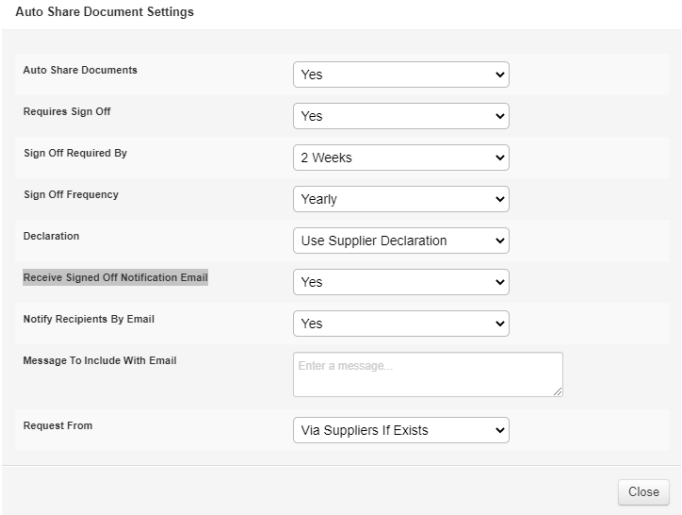
Selected Document Categories: Select the document categories that will form part of the rule. Select **Save** when done



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)

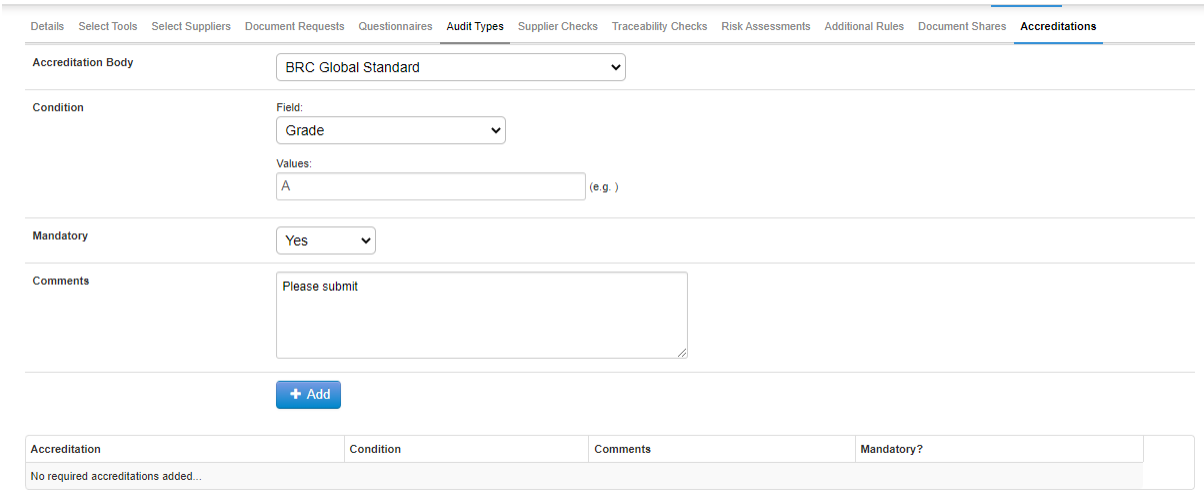


1.2.2.8 Accreditations – How to setup & select

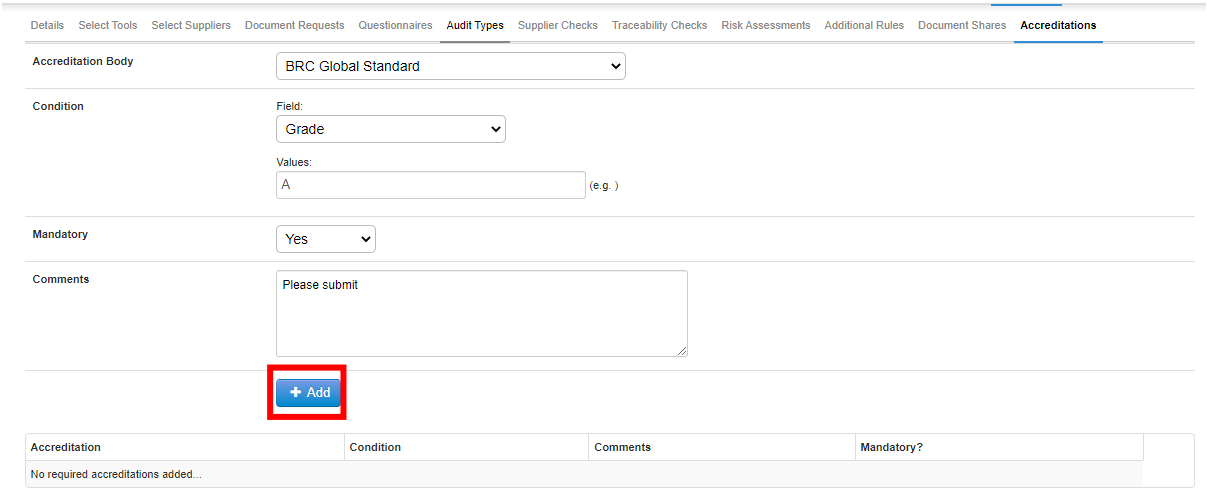
This is where you setup & select the accreditations you want to request from your suppliers to confirm they have, based on this rule.

Step 1:

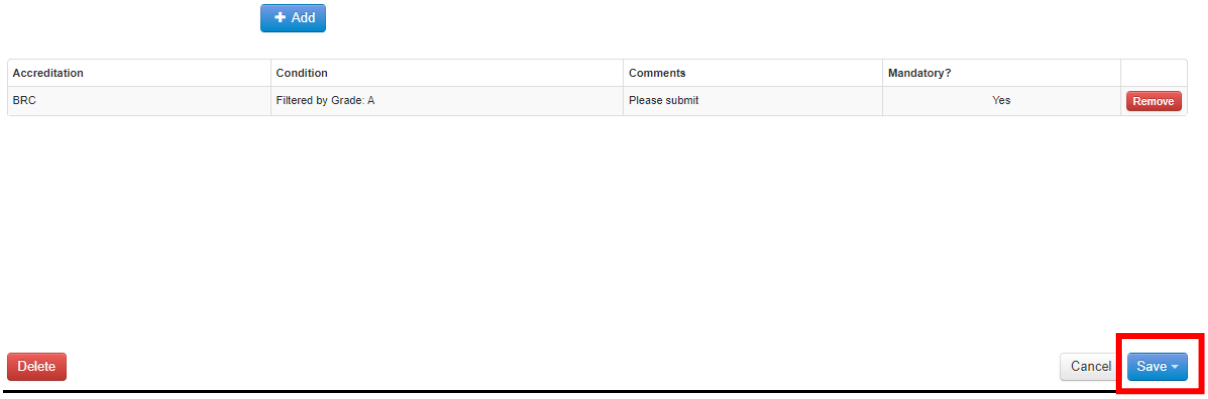
Accreditation Body: Select the accreditation body from the dropdown
Condition: Select is the rule based on Grade or Expiry date is valid
Mandatory: Yes or no – This means they must enter and is a required field
Comments: Add any requesting comments



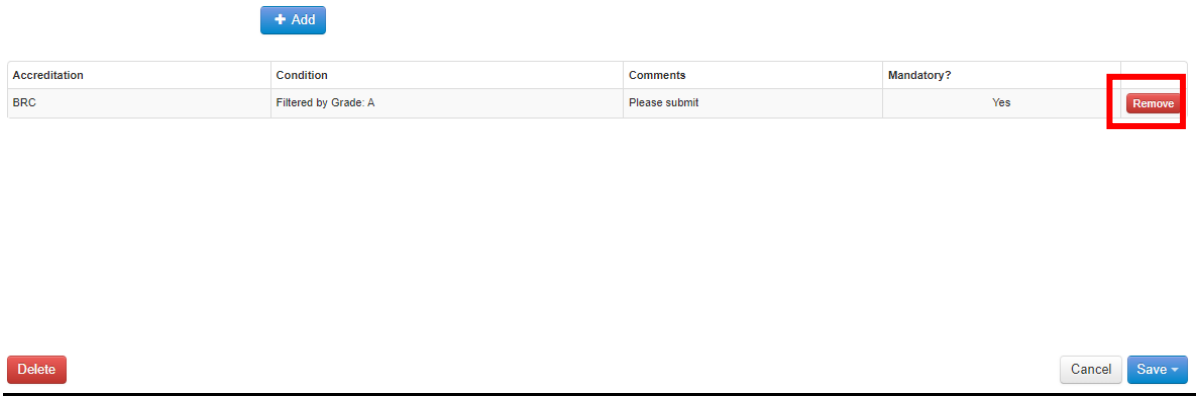
Step 2: When done select **Add**



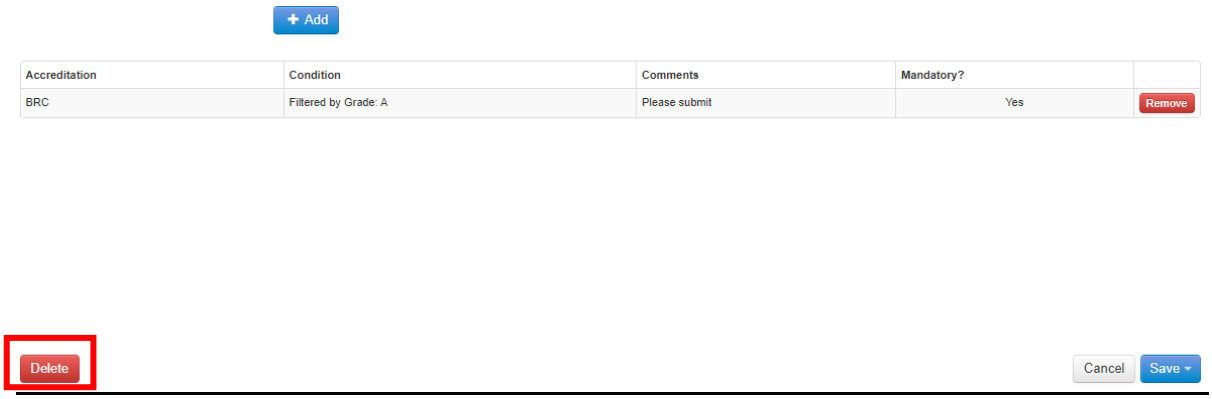
Step 3: Your accreditation is now pre-loaded. And looks like this below. Follow steps above to add further accreditations to this rule. Select **Save** when done



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



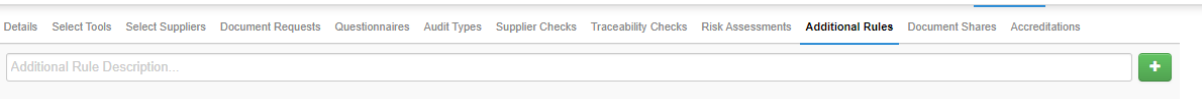
Step 5: At any stage you want to delete this part of your rule, select **Delete**



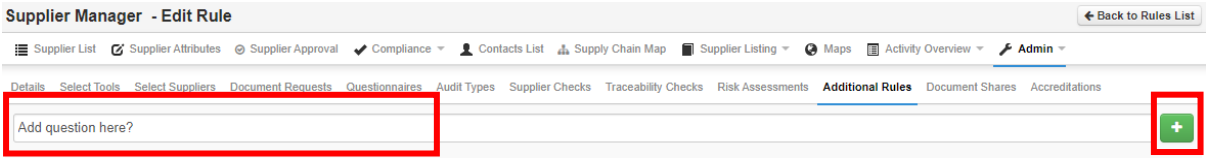
1.2.2.9 Additional Rules – How to create & setup

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.

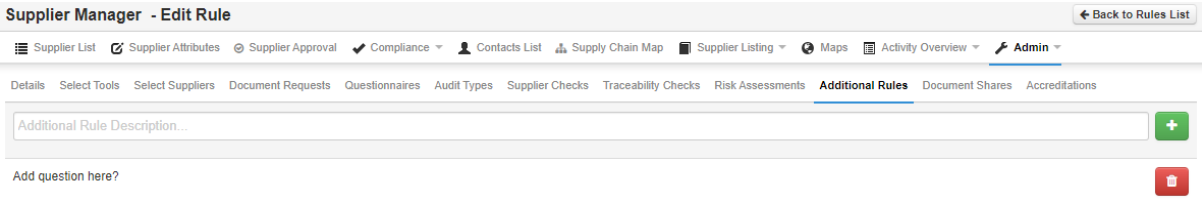
Step 1: An **Additional Rules** tab will appear. This allows you to add customisable questions that you can create that you might ask your suppliers. Select **Additional Rules**



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

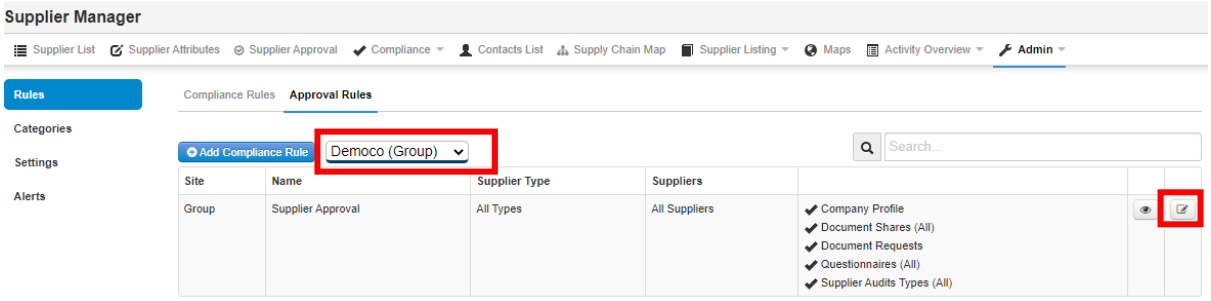


Step 3: When you are done your added rules will look like this below. You can delete and add new ones using the steps above. Select **Save** when done

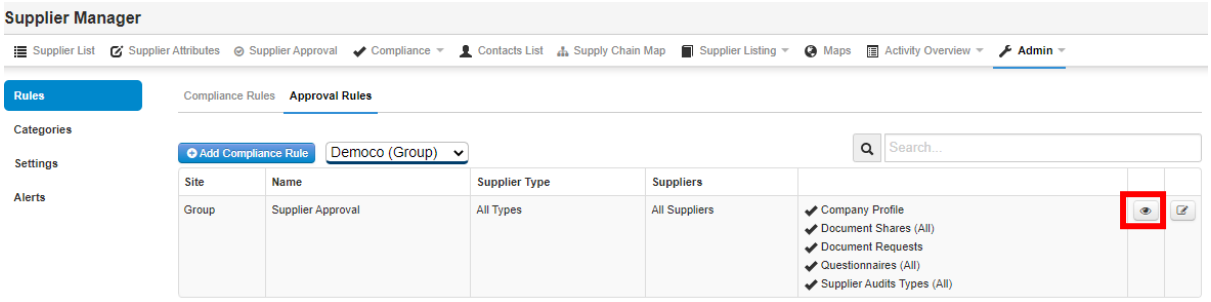


1.2.2.10 Completed Compliance Rules

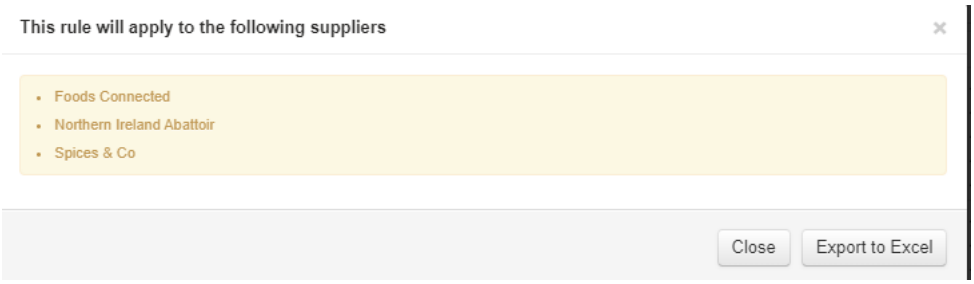
Step 1: Once you have done adding all your **Supplier Approval Rules** & **Additional Rules** your table will look like below. You can edit these at any time. Click on the edit button beside each rule and follow steps above to change. You can also filter your rules by site as you may have different rules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



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.



Step 3: View Suppliers



1.2.3 SETTINGS

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

On the settings tab in Compliancy 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

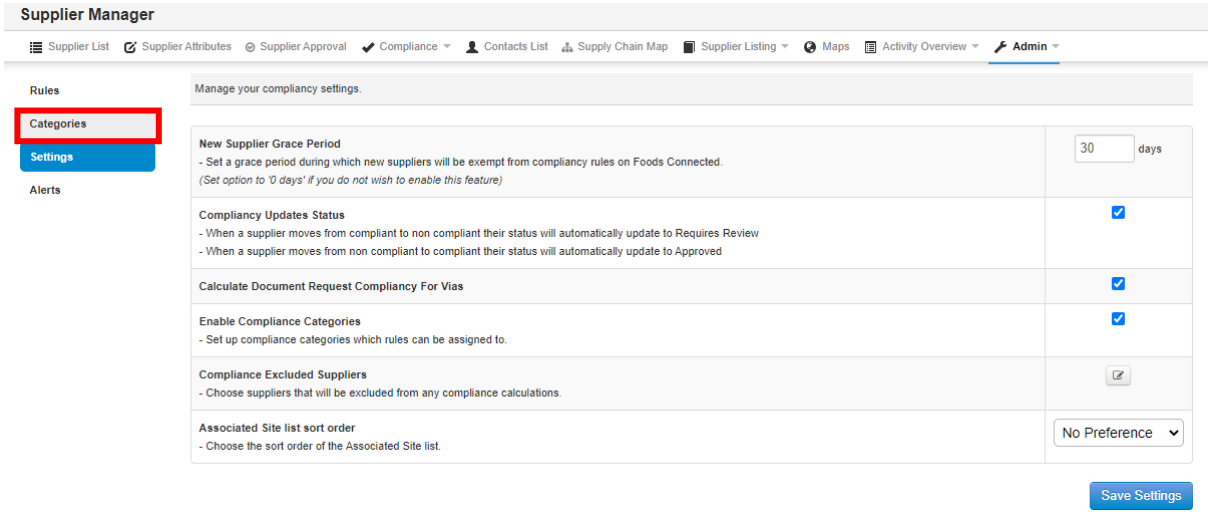
1.2.3.2 Compliancy Updates Status: When a supplier moves from compliant to non-compliant their status will automatically update to Requires Review and When a supplier moves from non-compliant to compliant their status will automatically update to Approved. Turn on or off

1.2.3.3 **Calculate Document Request Compliancy For Vias:** If the VIA is responsible for the supplier document requests the system will calculate the overall compliancy at a VIA level

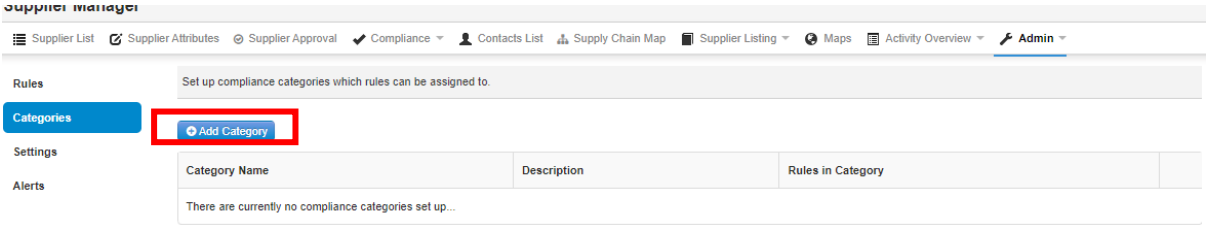
1.2.3.4 **Enable Compliance Categories:** Set up compliance categories which will sit under your rules & can be assigned to. (Once activated a new tab on the left above settings will appear to setup Compliance Categories called **Categories**)

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**

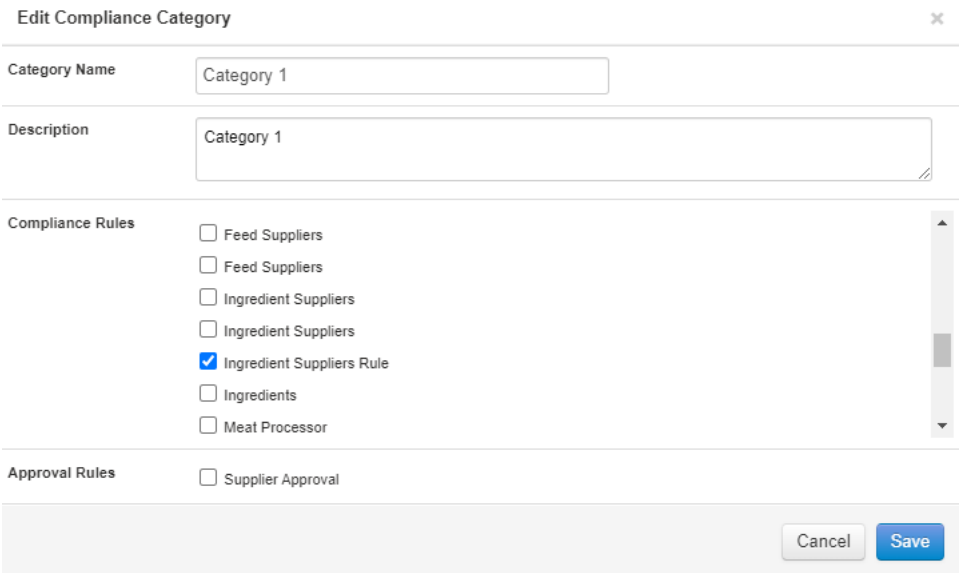


Step 2: Now Select **Add Category**

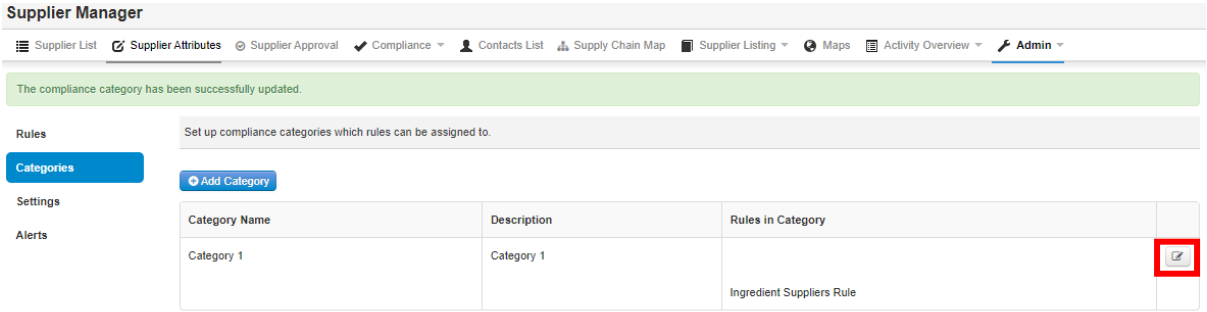


Step 3: Add details for the Category. Select **Save** when done

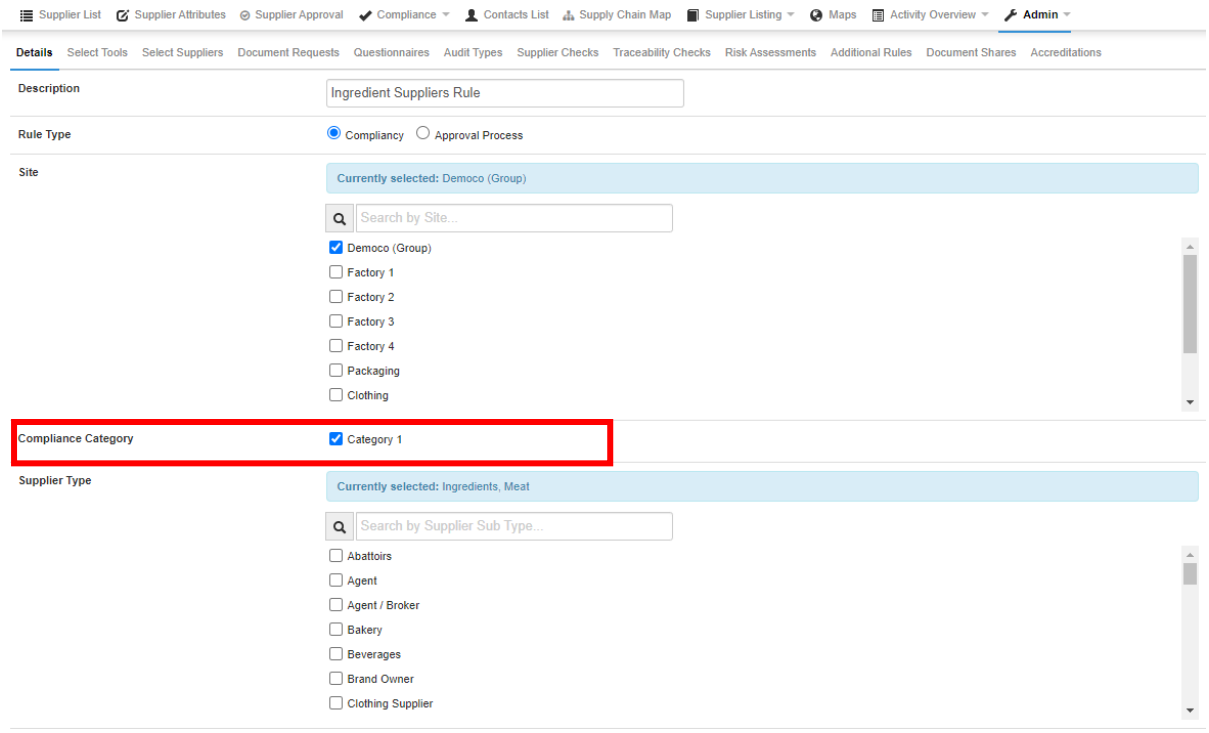
Compliance rule: This is the compliance rule that this category will sit under & can select.
Approval Rules: If you select Supplier Approval this category will apply to the **Supplier Approval** Rules you created.



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.



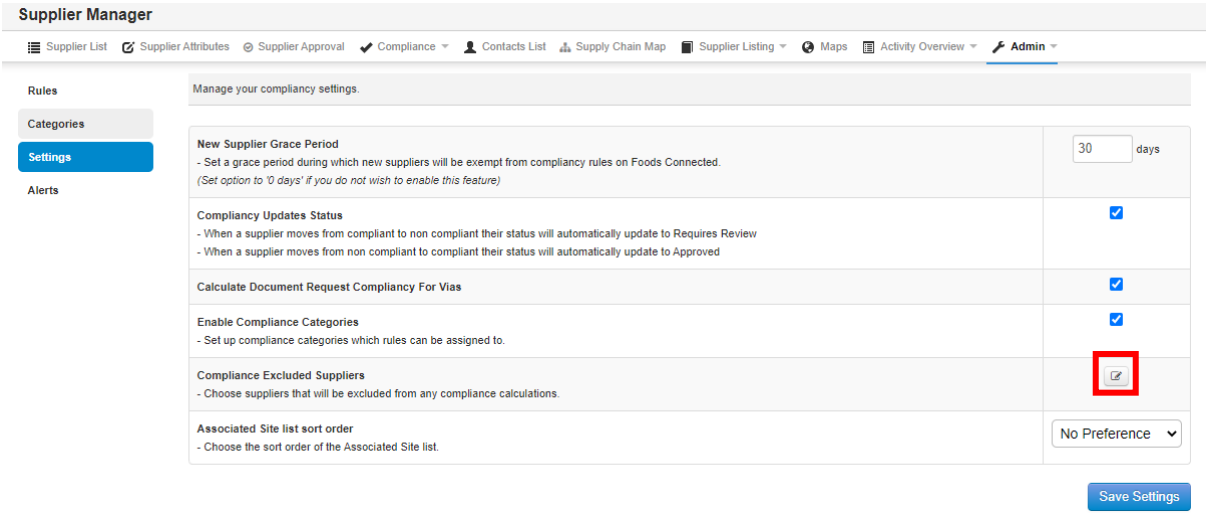
Step 5: If you now went back to your Compliance Rule (s) you can see the categories that you setup under that rule and make these rules more specific.



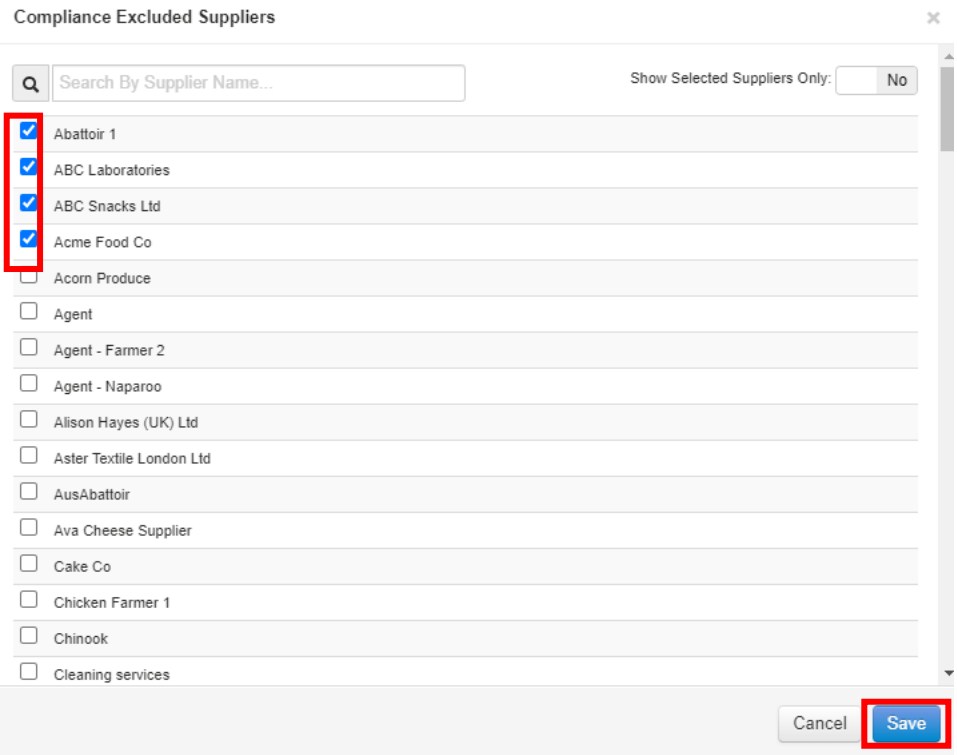
<u>This is something you can do at a later stage and can be setup & amended whenever you want. Or do before you setup your compliance rules.</u>

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

Step 1: Select the **Edit** button

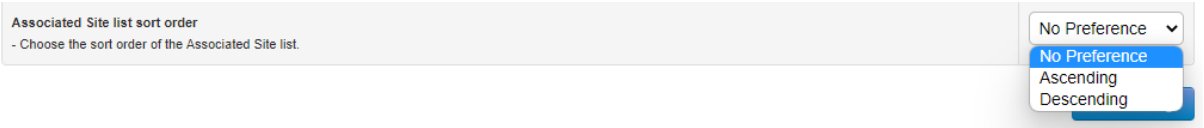


Step 2: Select the suppliers you want to be excluded form all compliance rules. Select **Save** when done



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

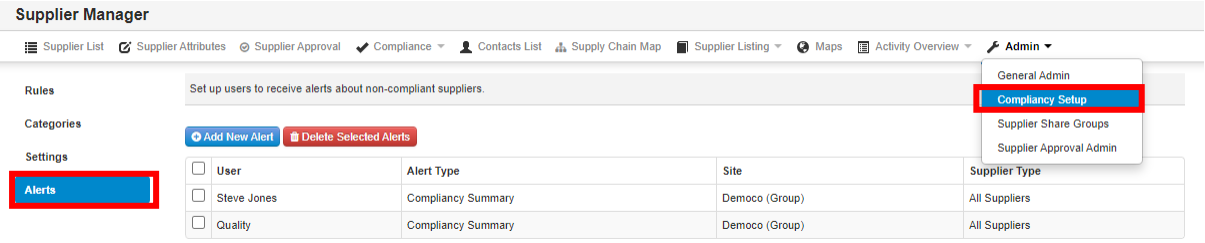
1.2.3.6 **Associated Site List sort order**: Choose the sort order of the Associated Site list.



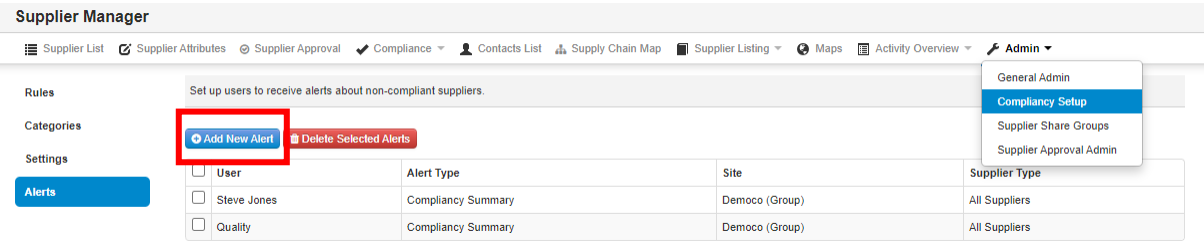
1.2.4 ALERTS

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

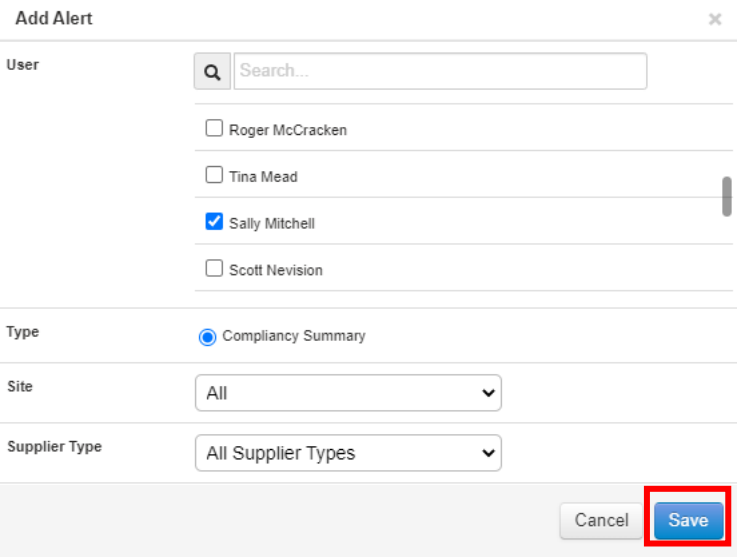
Step 1: Select **Admin → Compliancy Setup →Alerts**



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



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



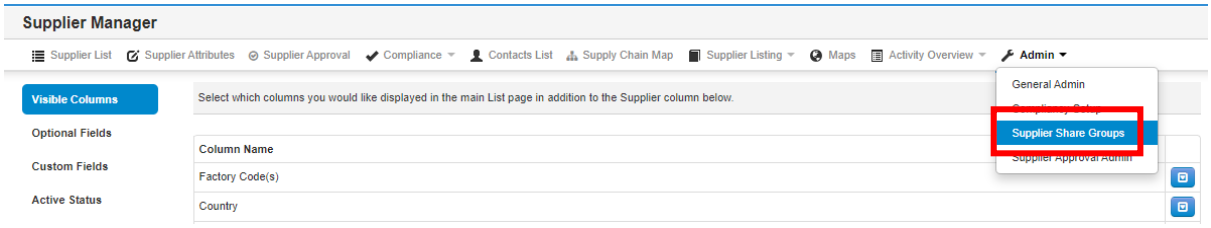
Step 4: Your alerts will look like this below. To add further alerts or more specific alerts follow the steps above.

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

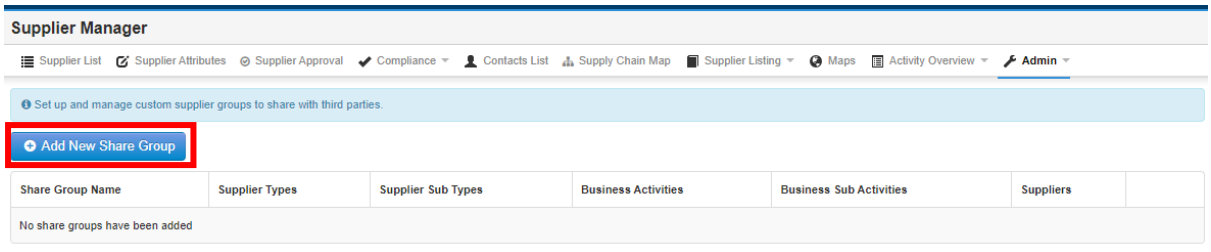
1.3 SUPPLIER SHARE GROUPS

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

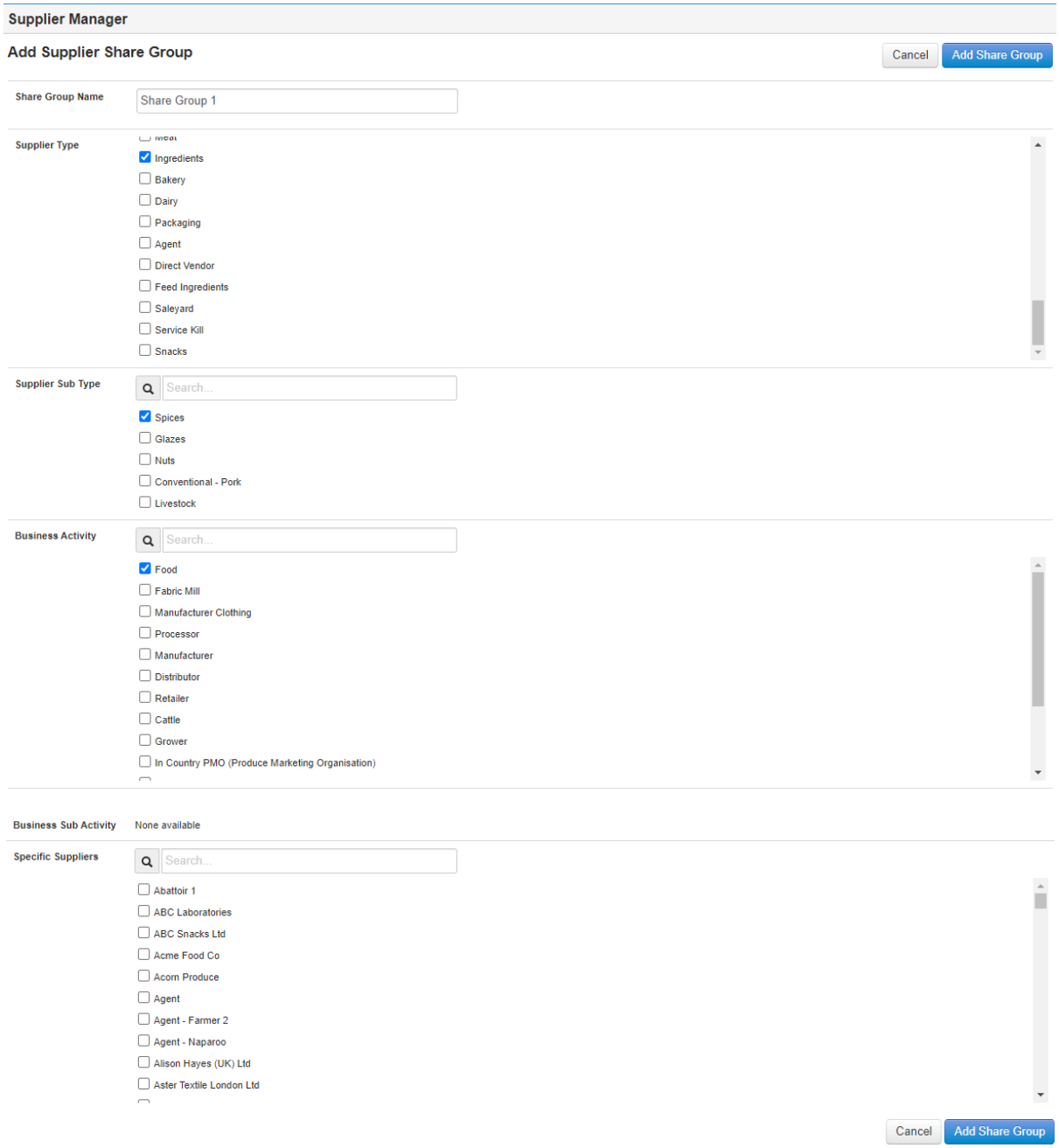
Step 1: Select **Admin → Compliancy Setup →Supplier Share Groups**



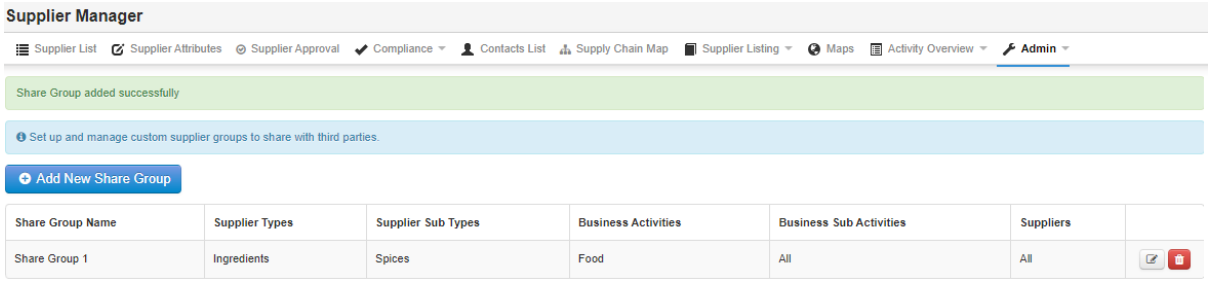
Step 2: To add a new share group, select **Add New Share Group**



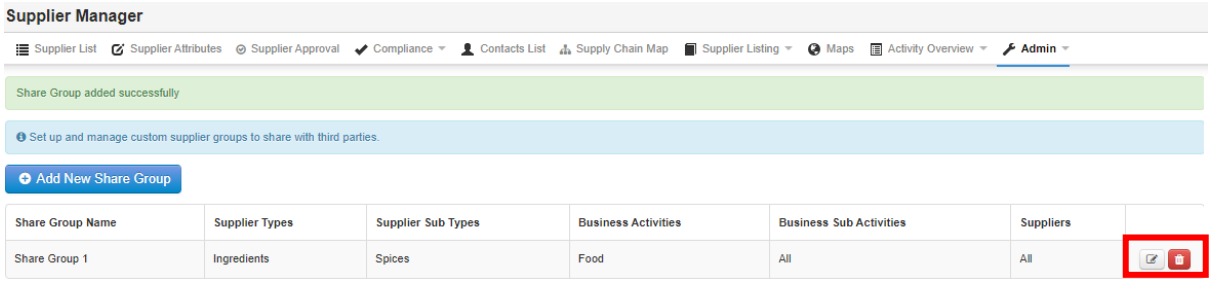
Step 3: Now select what you want to form part of this share group, **Supplier Type**, **Sub Type**, **Business Activity, Sub Activity** and even **Specific Suppliers**. When done select **Add Share Group**



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.



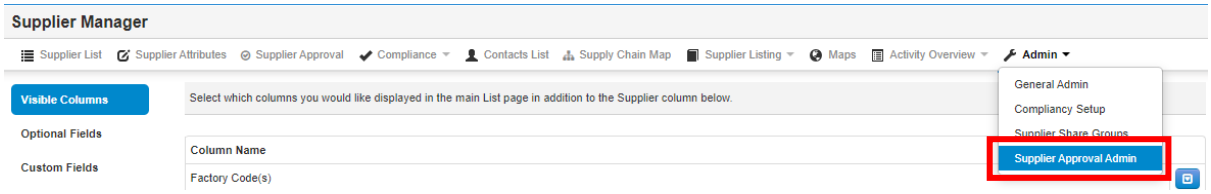
Step 5: To Edit select the **edit** button and follow the steps above. And to delete, select the red **Delete** button



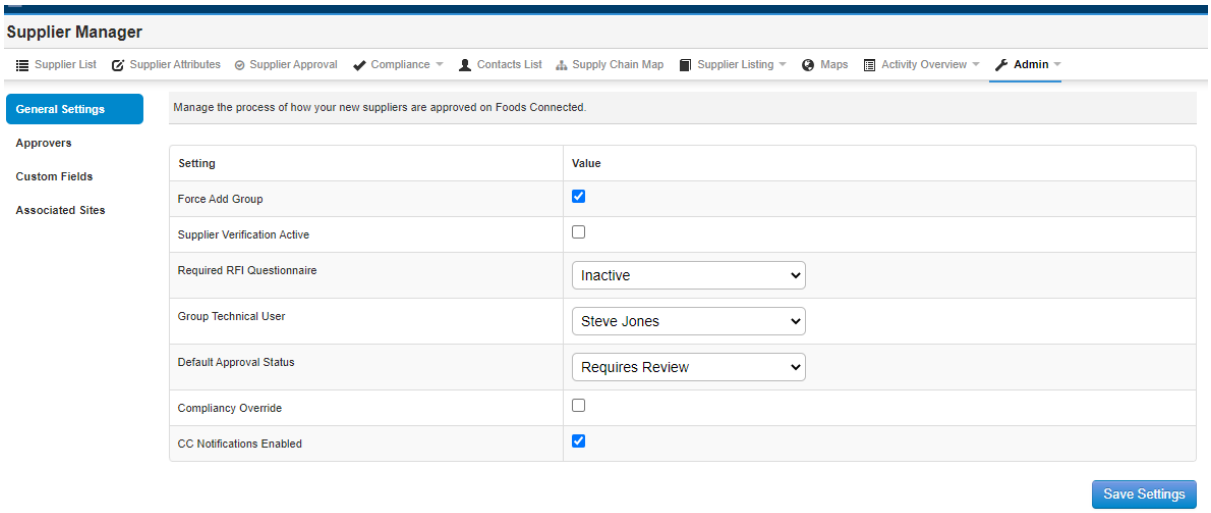
1.4 SUPPLIER APPORVAL ADMIN - SETUP OF THE APPROVAL FUNCTION

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

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



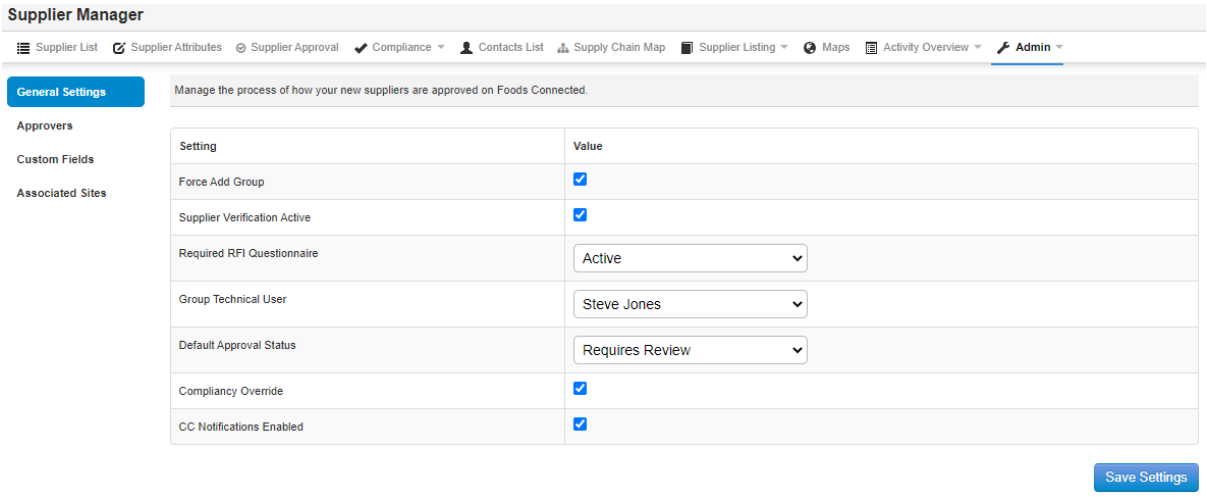
Step 2:



1.4.1 GENERAL SETTINGS – CREATE & SETUP

Step 1:

- ***Force Add Group:*** This measn 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 th 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
- ***Compliancy Override:*** You can override supplier compliancy rules. On or off
- ***CC Notifications Enabled:*** On or off

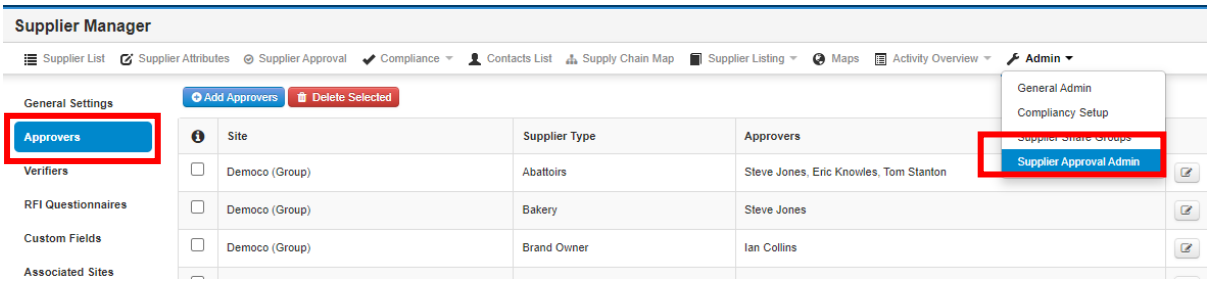


Step 2: Select **Save Settings** when done

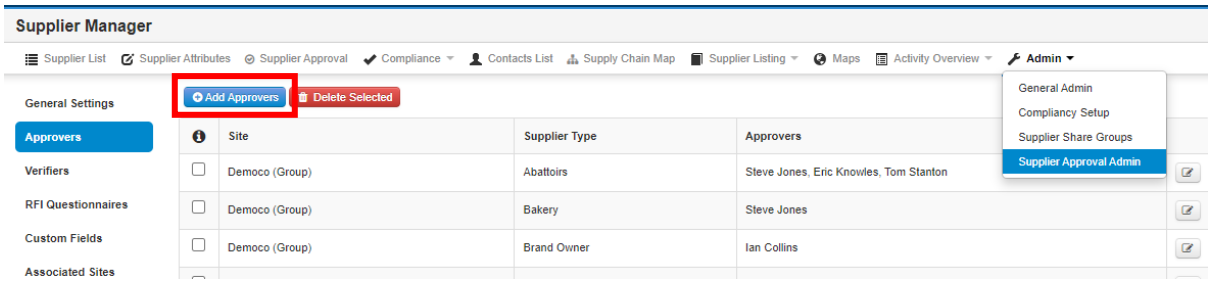
1.4.2 APPROVERS – CREATE & SETUP SUPPLIER APPROVERS

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

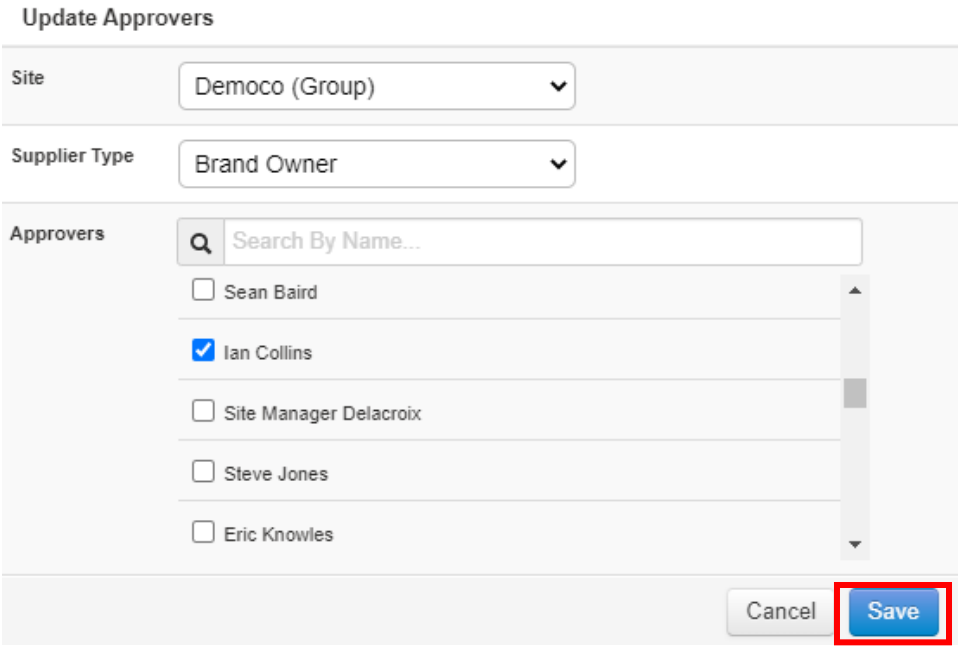
Step 1: Select **Admin → Supplier Approval Admin → Add Approvers**



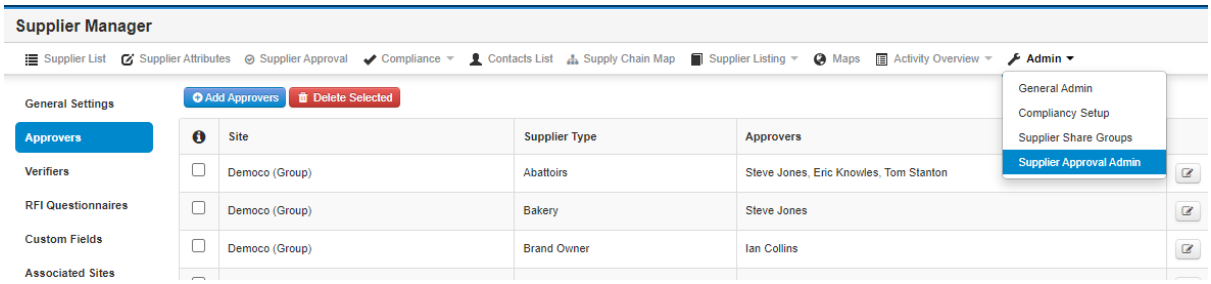
Step 2: Select **Add Approvers**



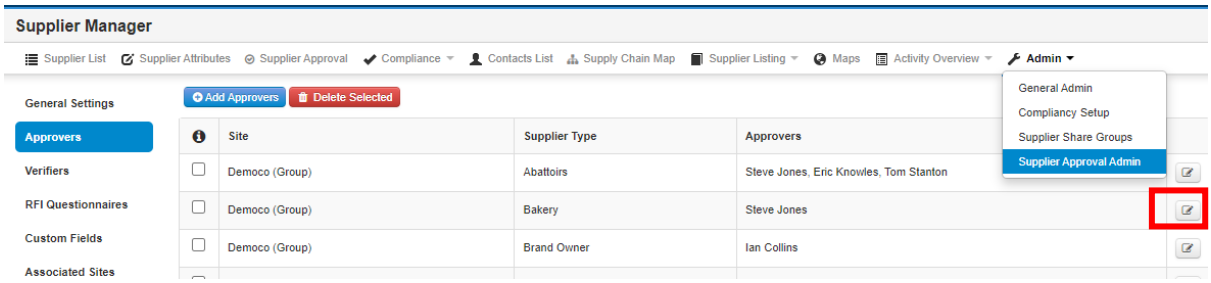
Step 3: Select the **Site** that this relates too, then the **Supplier Type** that your **User** or **Team** is the dedicated approver for, then choose the user and select **Save**



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



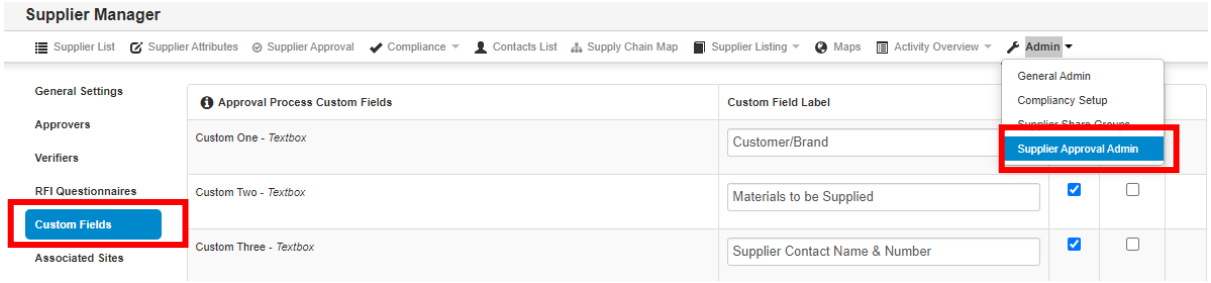
Step 5: To edit an approver simply select the **edit** button beside and follow the steps above.



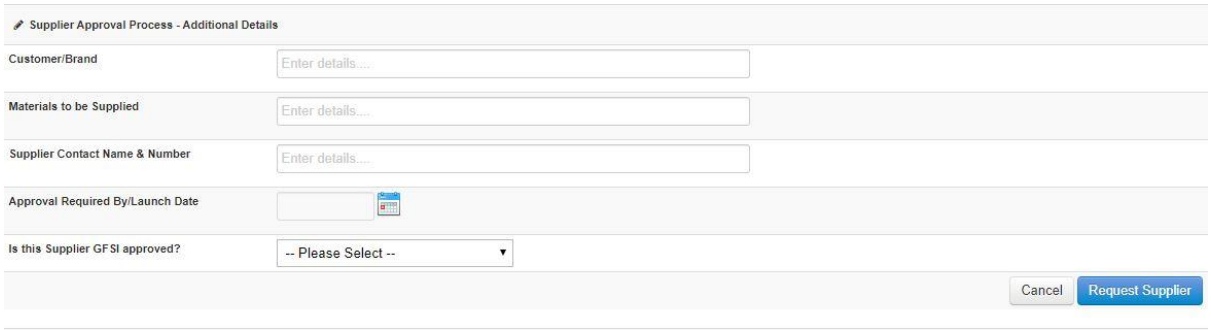
1.4.3 CUSTOM FIELDS - SETUP & CREATE APPROVAL PROCESS CUSTOM FIELDS

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**



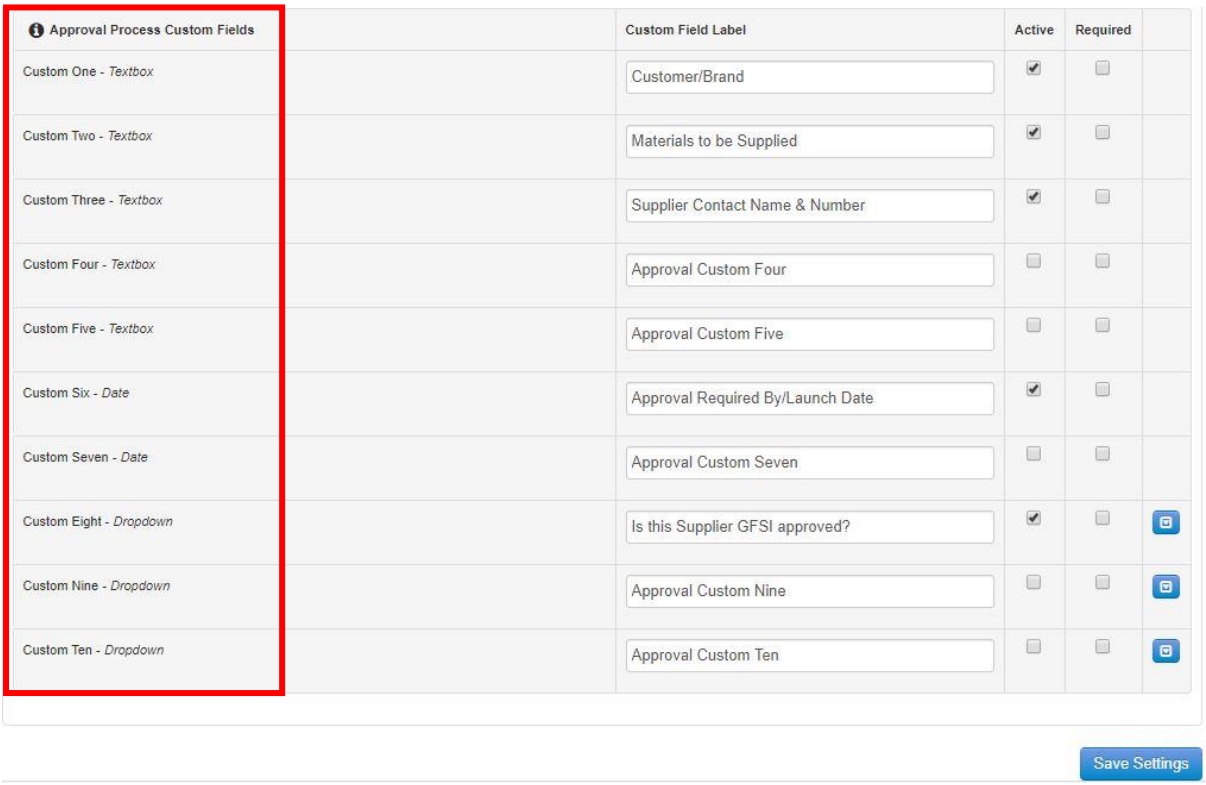
How they look when adding new suppliers



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

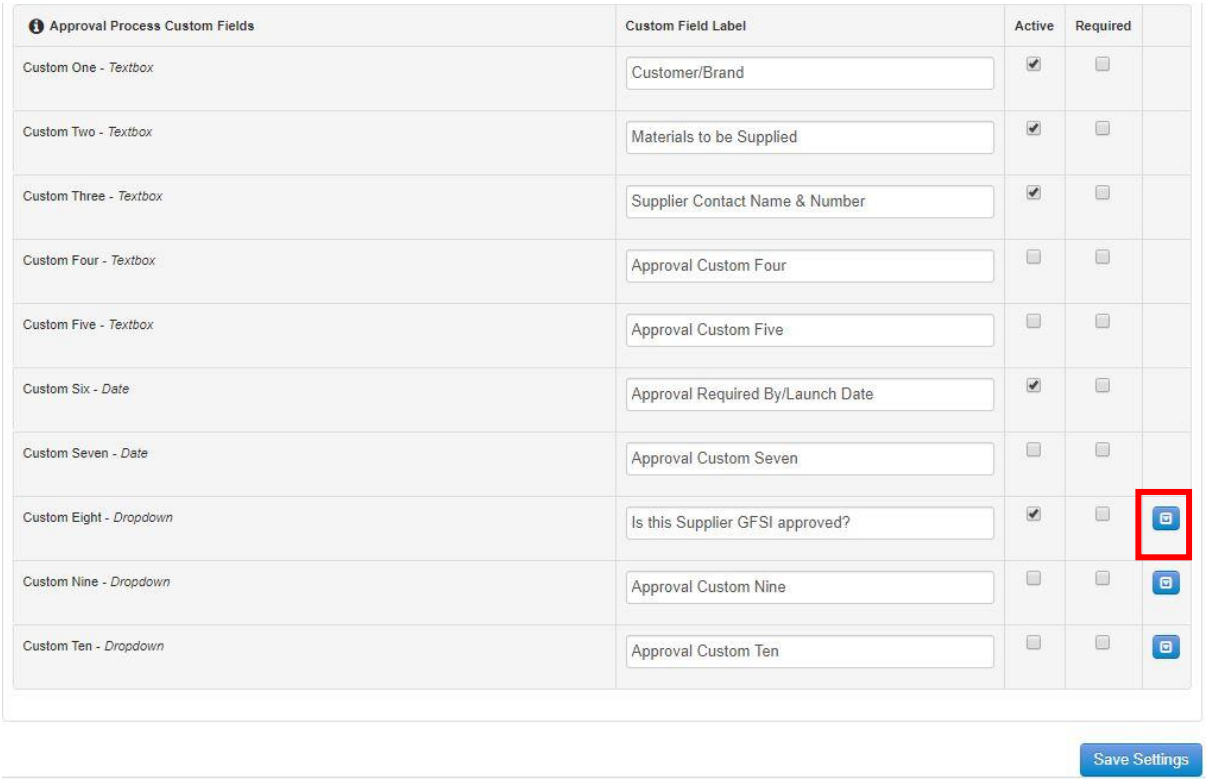
Step 2: Select which field type you want to use as you have a choice of **Textbox**, **Dates**, **Dropdowns**



Approval Process Custom Fields	Custom Field Label	Active	Required	
Custom One - *Textbox*	Customer/Brand	☑	☐	
Custom Two - *Textbox*	Materials to be Supplied	☑	☐	
Custom Three - *Textbox*	Supplier Contact Name & Number	☑	☐	
Custom Four - *Textbox*	Approval Custom Four	☐	☐	
Custom Five - *Textbox*	Approval Custom Five	☐	☐	
Custom Six - *Date*	Approval Required By/Launch Date	☑	☐	
Custom Seven - *Date*	Approval Custom Seven	☐	☐	
Custom Eight - *Dropdown*	Is this Supplier GFSI approved?	☑	☐	
Custom Nine - *Dropdown*	Approval Custom Nine	☐	☐	
Custom Ten - *Dropdown*	Approval Custom Ten	☐	☐	

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	☑	☐	
Custom Two - *Textbox*	Materials to be Supplied	☑	☐	
Custom Three - *Textbox*	Supplier Contact Name & Number	☑	☐	
Custom Four - *Textbox*	Approval Custom Four	☐	☐	
Custom Five - *Textbox*	Approval Custom Five	☐	☐	
Custom Six - *Date*	Approval Required By/Launch Date	☑	☐	
Custom Seven - *Date*	Approval Custom Seven	☐	☐	
Custom Eight - *Dropdown*	Is this Supplier GFSI approved?	☑	☐	
Custom Nine - *Dropdown*	Approval Custom Nine	☐	☐	
Custom Ten - *Dropdown*	Approval Custom Ten	☐	☐	

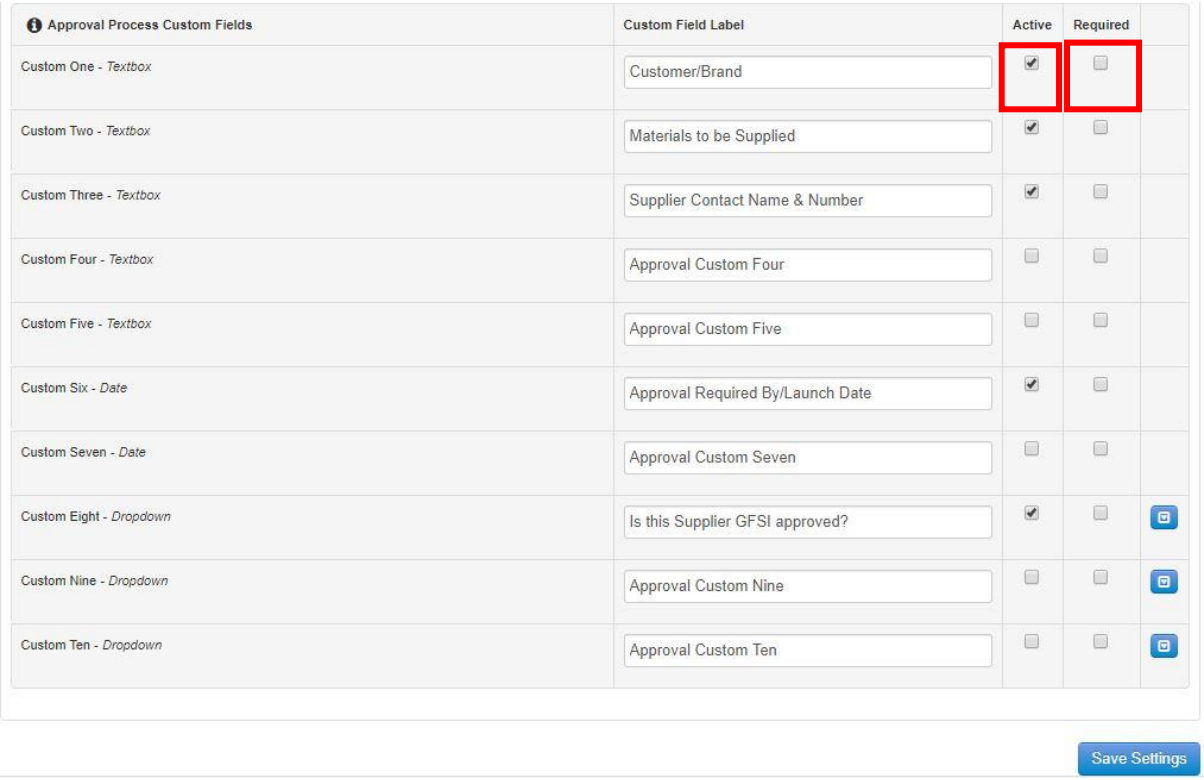
Save Settings

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

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

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

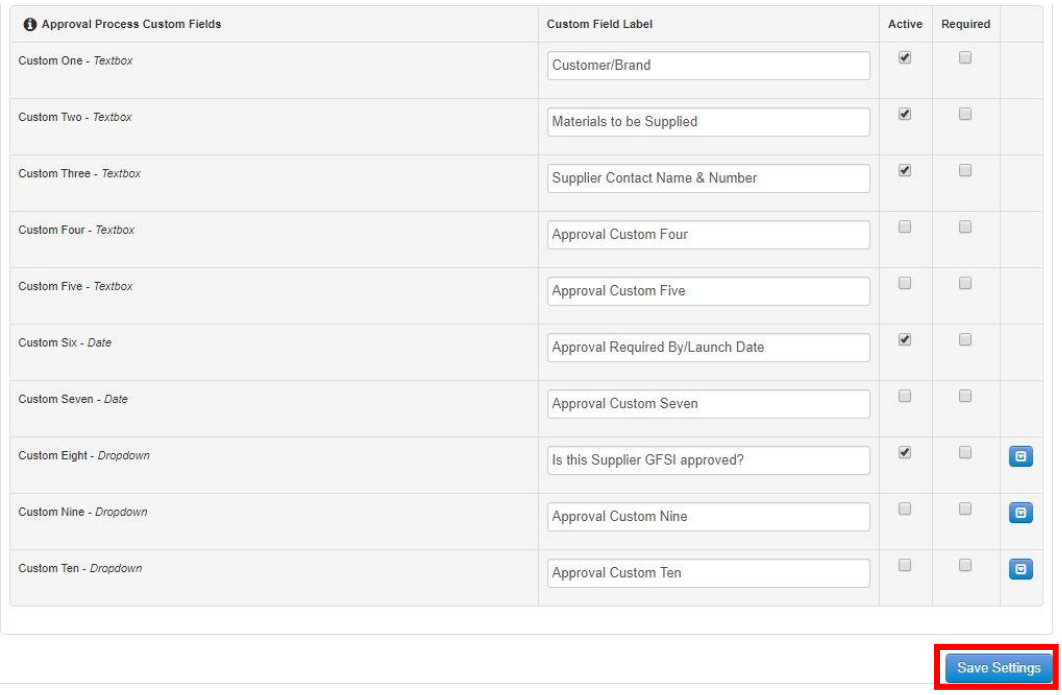
Step 7: Select **Active** beside the fields you want to turn on and select **Required** if this question must be answered by you.



Approval Process Custom Fields	Custom Field Label	Active	Required
Custom One - *Textbox*	Customer/Brand	☑	☐
Custom Two - *Textbox*	Materials to be Supplied	☑	☐
Custom Three - *Textbox*	Supplier Contact Name & Number	☑	☐
Custom Four - *Textbox*	Approval Custom Four	☐	☐
Custom Five - *Textbox*	Approval Custom Five	☐	☐
Custom Six - *Date*	Approval Required By/Launch Date	☑	☐
Custom Seven - *Date*	Approval Custom Seven	☐	☐
Custom Eight - *Dropdown*	Is this Supplier GFSI approved?	☑	☐
Custom Nine - *Dropdown*	Approval Custom Nine	☐	☐
Custom Ten - *Dropdown*	Approval Custom Ten	☐	☐

Save Settings

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



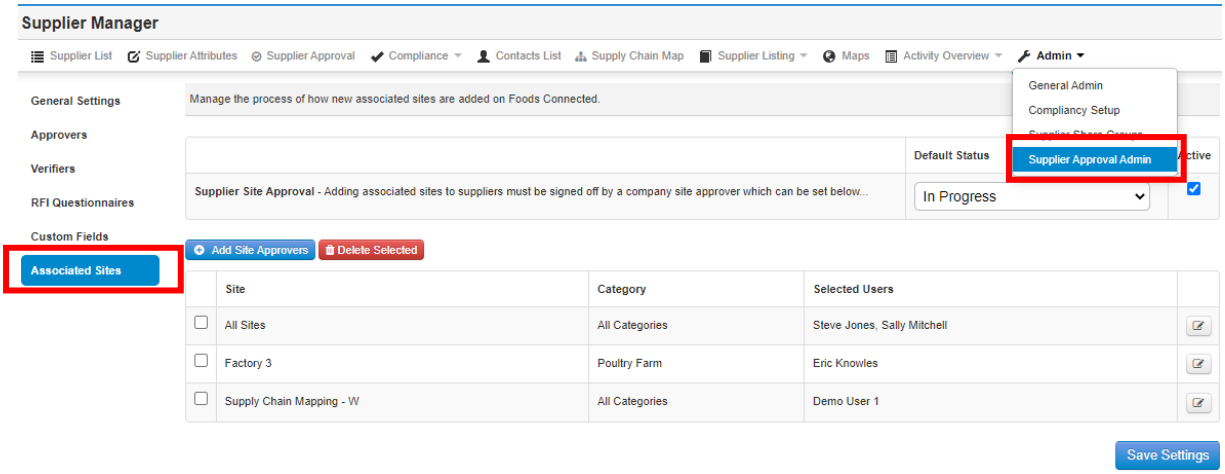
Approval Process Custom Fields	Custom Field Label	Active	Required
Custom One - *Textbox*	Customer/Brand	☑	☐
Custom Two - *Textbox*	Materials to be Supplied	☑	☐
Custom Three - *Textbox*	Supplier Contact Name & Number	☑	☐
Custom Four - *Textbox*	Approval Custom Four	☐	☐
Custom Five - *Textbox*	Approval Custom Five	☐	☐
Custom Six - *Date*	Approval Required By/Launch Date	☑	☐
Custom Seven - *Date*	Approval Custom Seven	☐	☐
Custom Eight - *Dropdown*	Is this Supplier GFSI approved?	☑	☐
Custom Nine - *Dropdown*	Approval Custom Nine	☐	☐
Custom Ten - *Dropdown*	Approval Custom Ten	☐	☐

Save Settings

1.4.4 ASSOCIATED SITES – HOW TO CREATE & SETUP

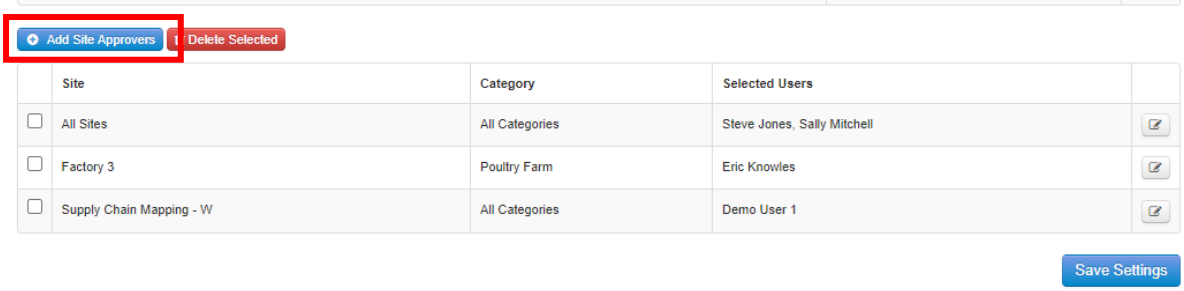
This is where you setup who approves adding associated sites to suppliers. This must be signed off by a company site approver which can be set here.

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

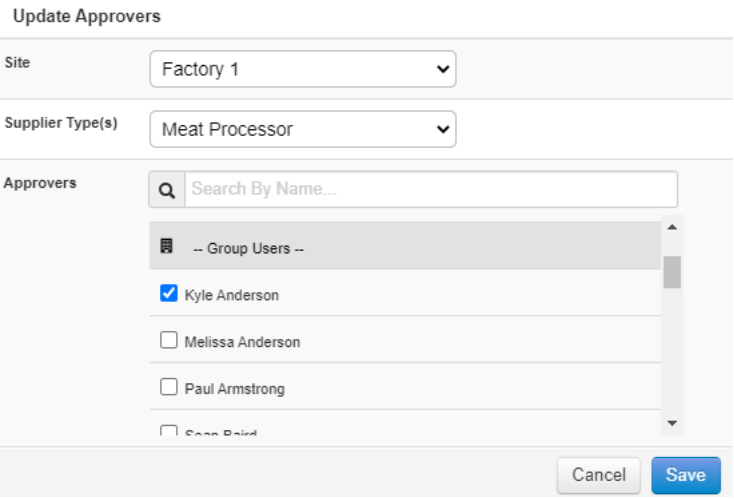


Step 2: Turn on Supplier Site Approval by setting as **Active &** choose the **Default Status** of the supplier when you add a new associated site. Select **Save Settings** when done.

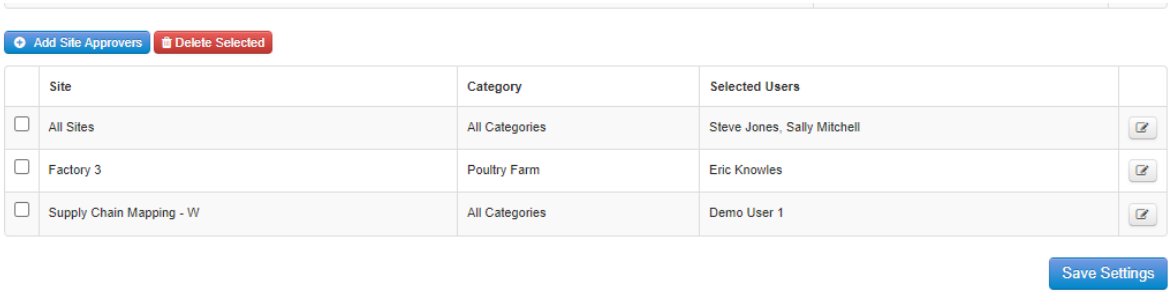
Step 3: Now add the site approvers by selecting **Add Site Approvers**



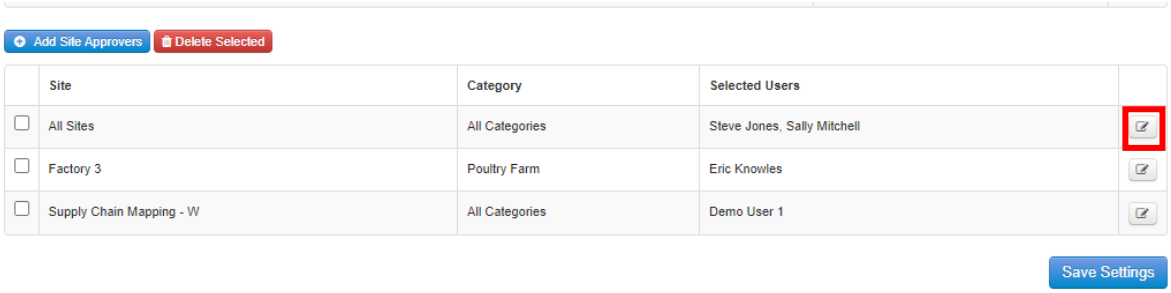
Step 4: Now select the **Site** the approver is from, the **Supplier Types** or All the approver can approve & then Select the **Approver**. Once done select **Save**



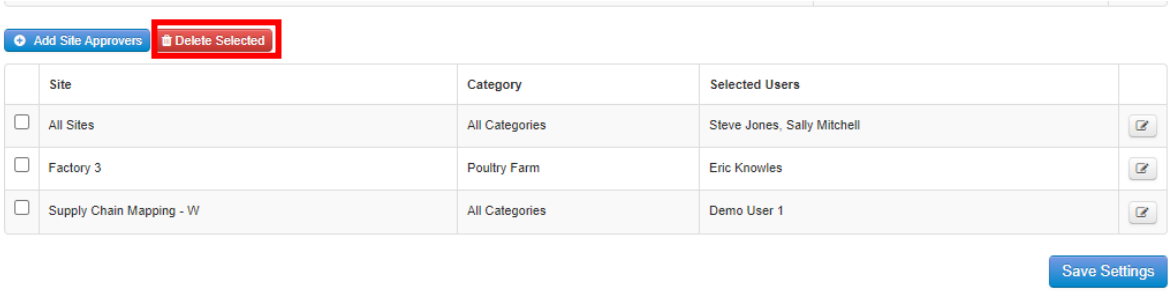
Step 5: Once done your approvers will look like this below. Select **Save settings**. To edit seimply select the edit button and follow steps above



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



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



2. ADDING A NEW SUPPLIER

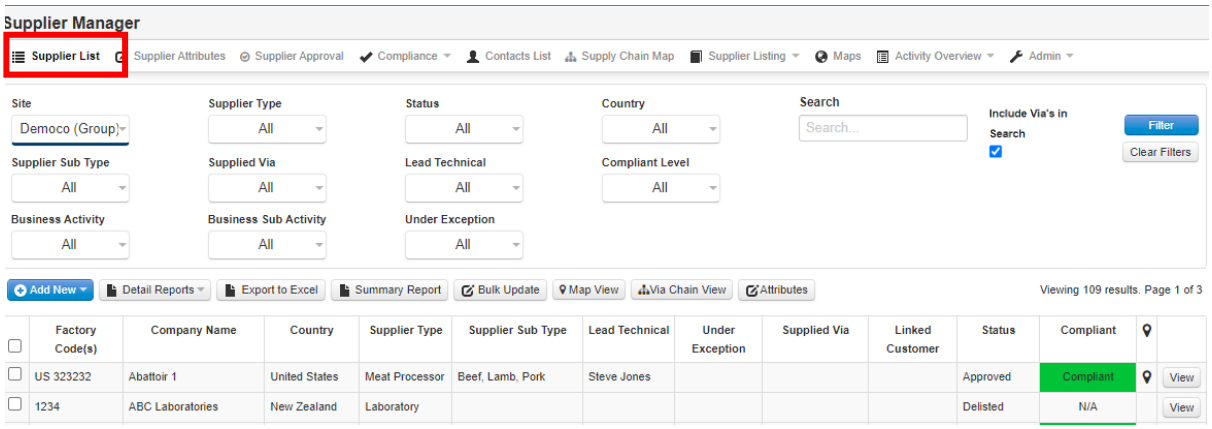
After setup is complete the next step is to add your Suppliers to your Supplier List.

There are two options for adding suppliers,

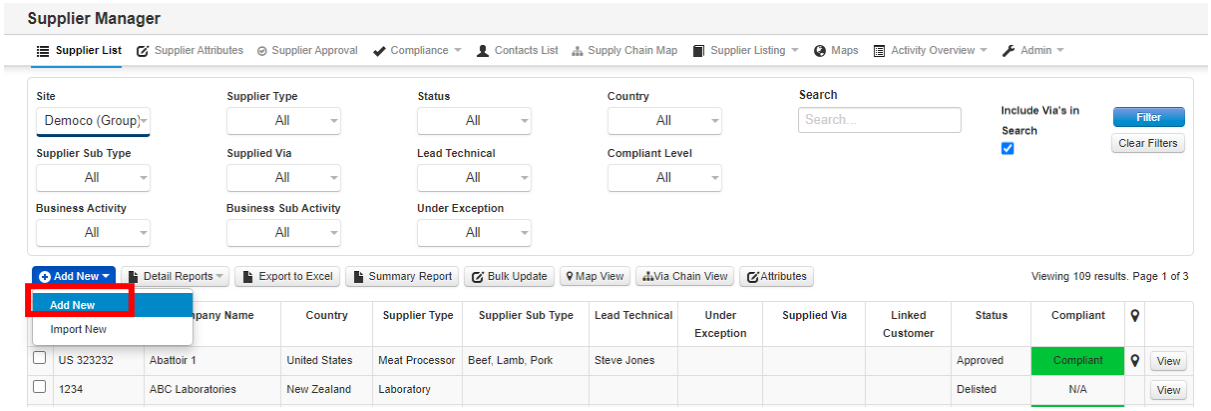
1. **Add Individual suppliers one at a time (most beneficial for updating a Supplier List).**
2. **Adding bulk supplier (most beneficial when you have a new supplier list with numerous suppliers being added)**

2.1 ADD INDIVIDUAL SUPPLIERS

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

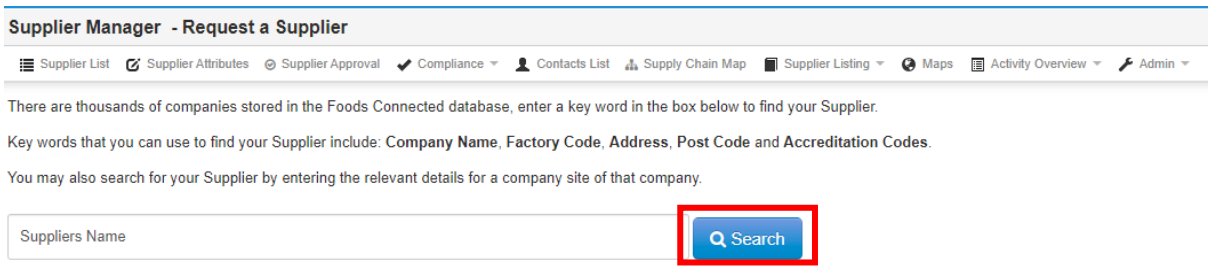


Step 2: Select **Add New** then **Add New**

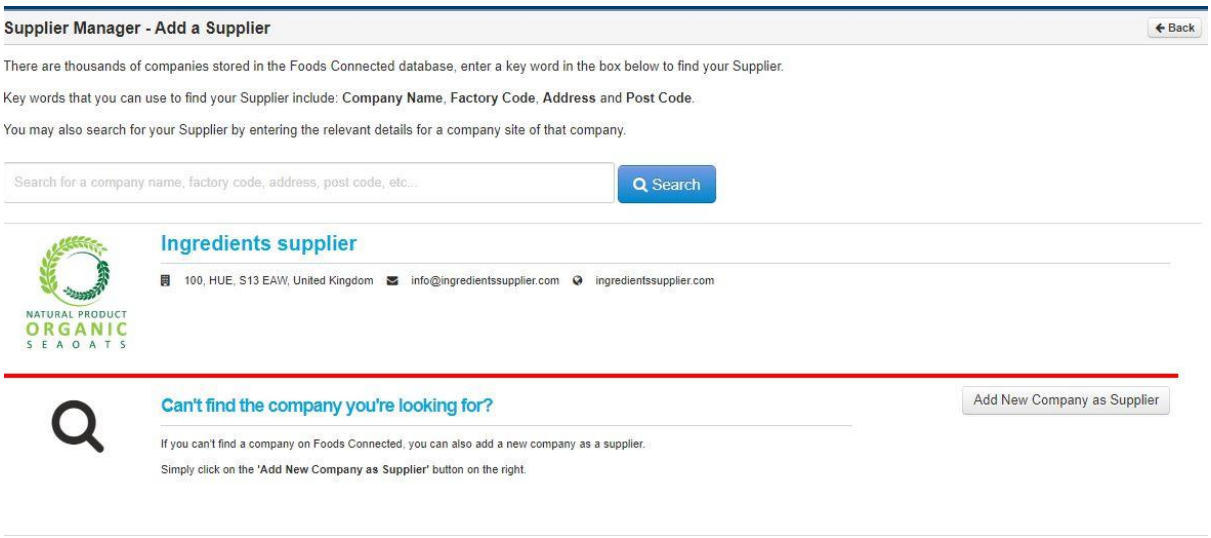


Step 3: Type in your supplier's name & select **Search.**

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

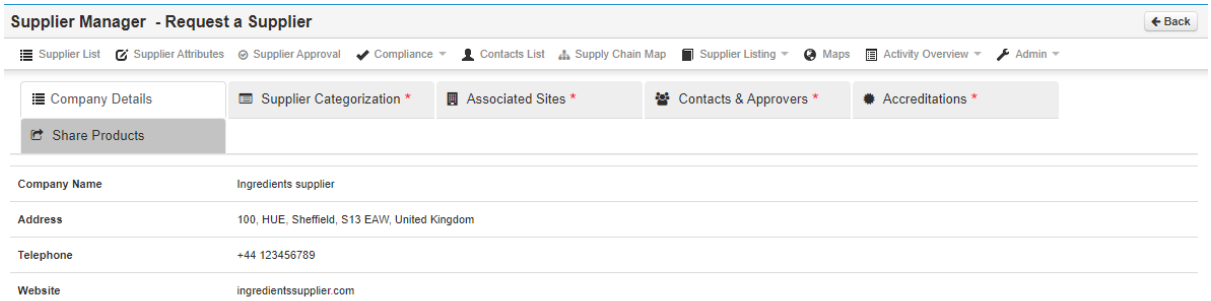


Step 4: If the supplier is currently on Foods Connected it will appear in the list to select, if the supplier is not in the database it will give you the option to request a new supplier. This request will go to the Foods Connected Support team for review & approval.

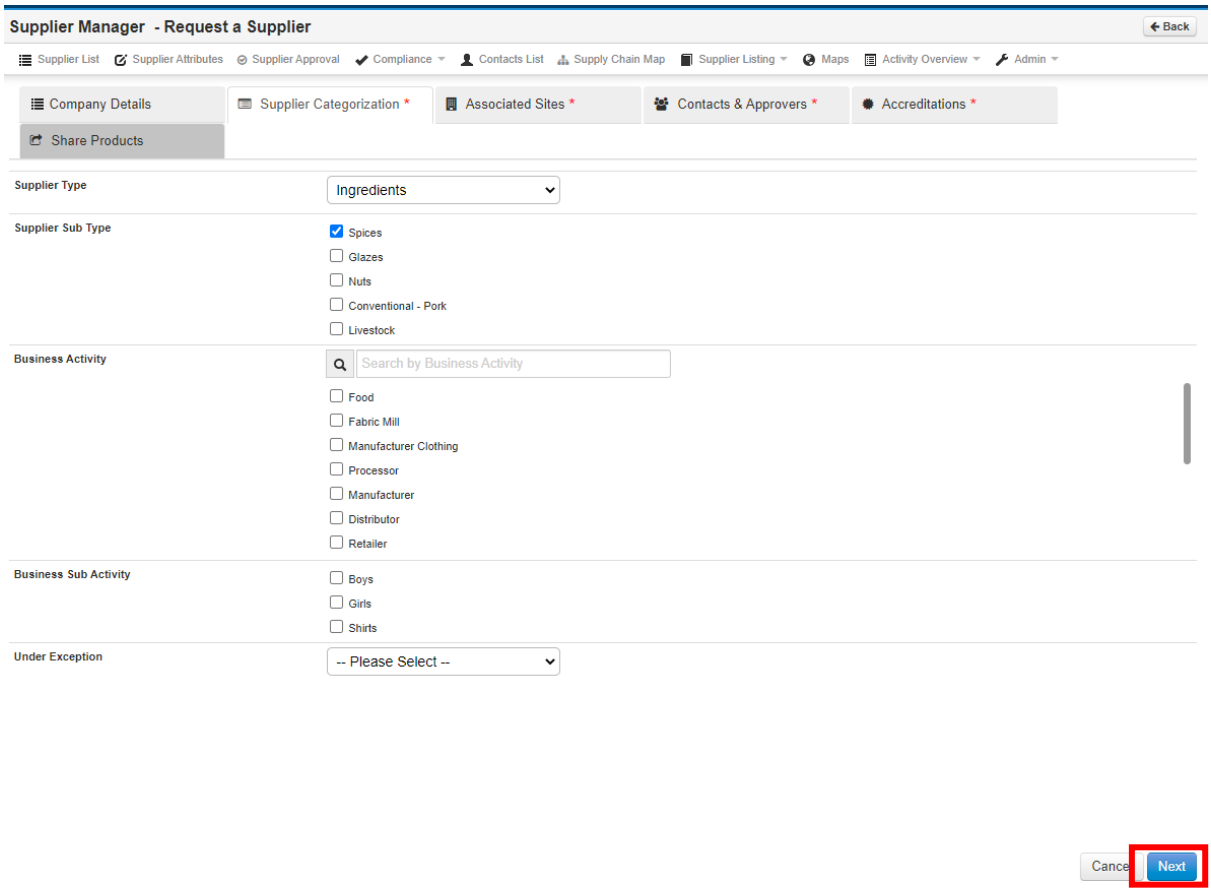


2.1.1 IF THE COMPANY EXISTS IN THE DATABASE

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

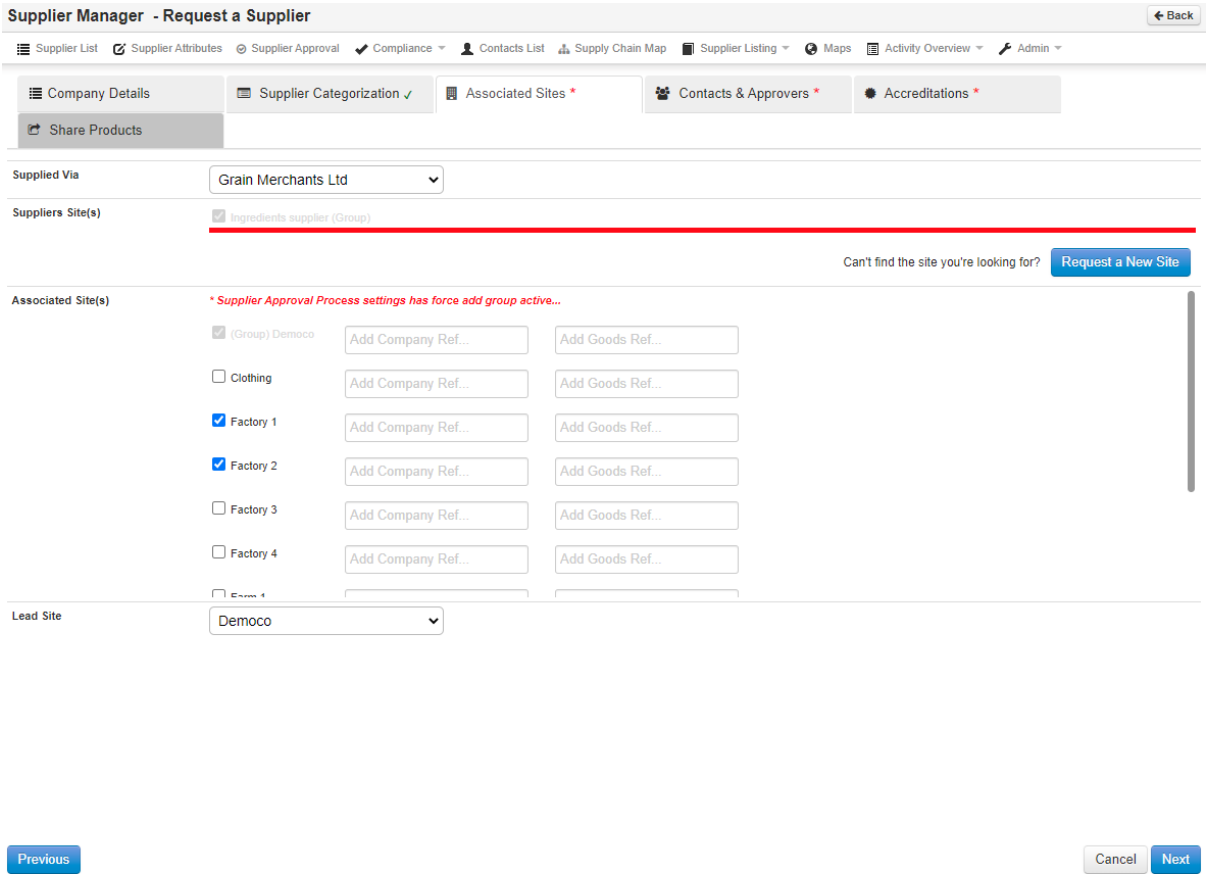


Step 2: Supplier Categorisation - Now select the Supplier Type, Sub Type etc. These are the fields that you activated & setup in the Initial Setup stage. Select **Next** when done



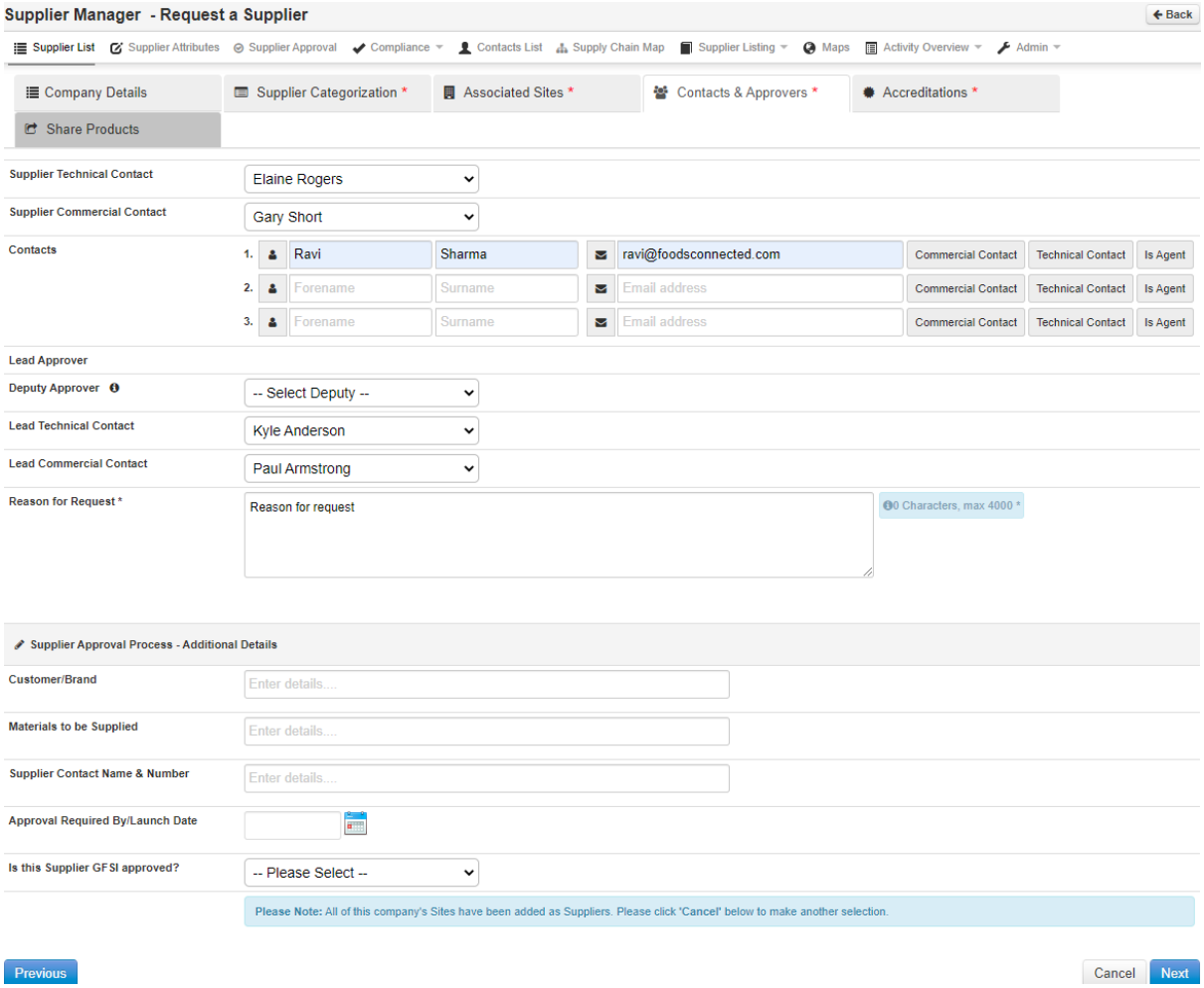
Step 3: Associated Sites - Now select the below

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

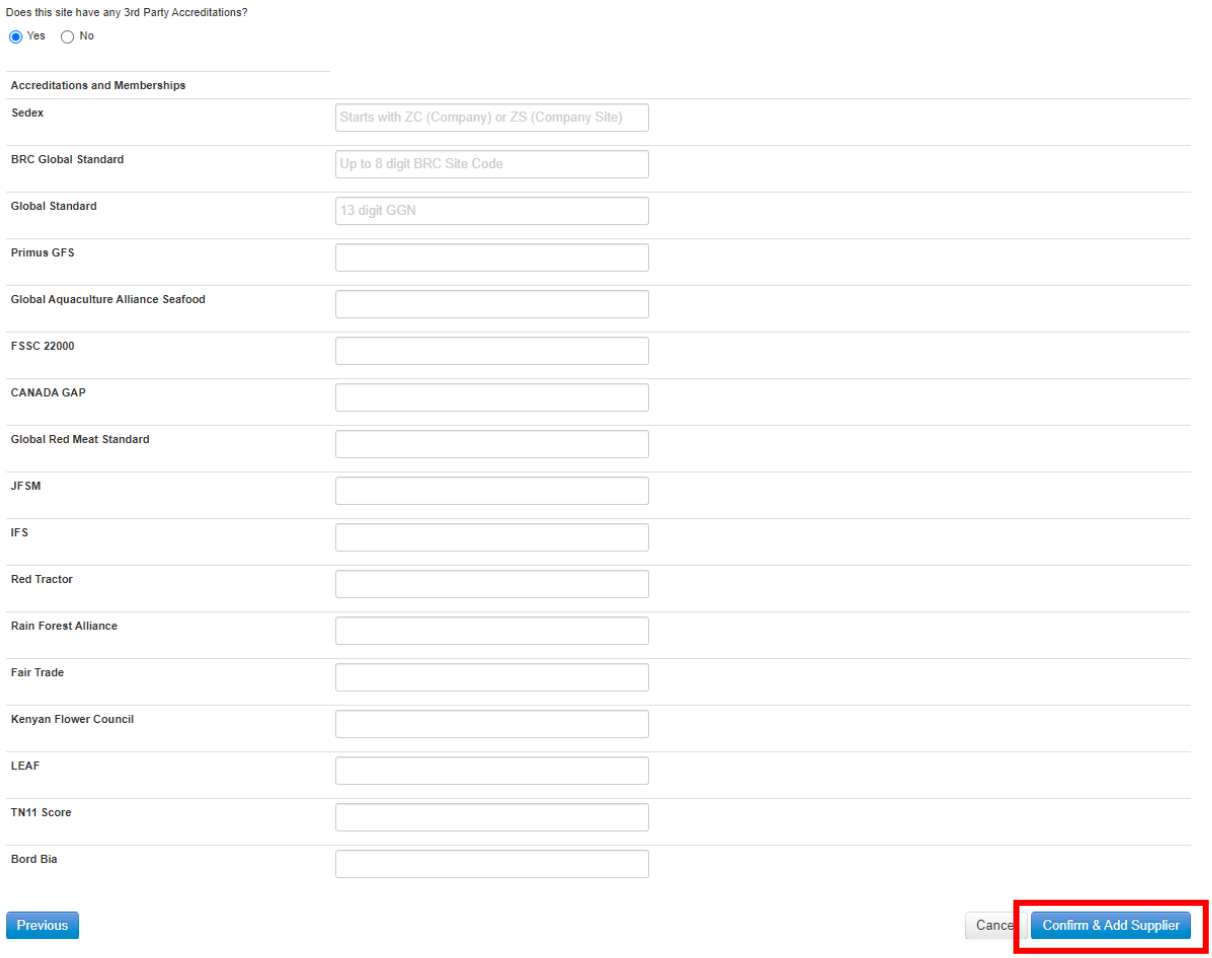


Step 4: Contacts & Approvers - Now select the below

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.



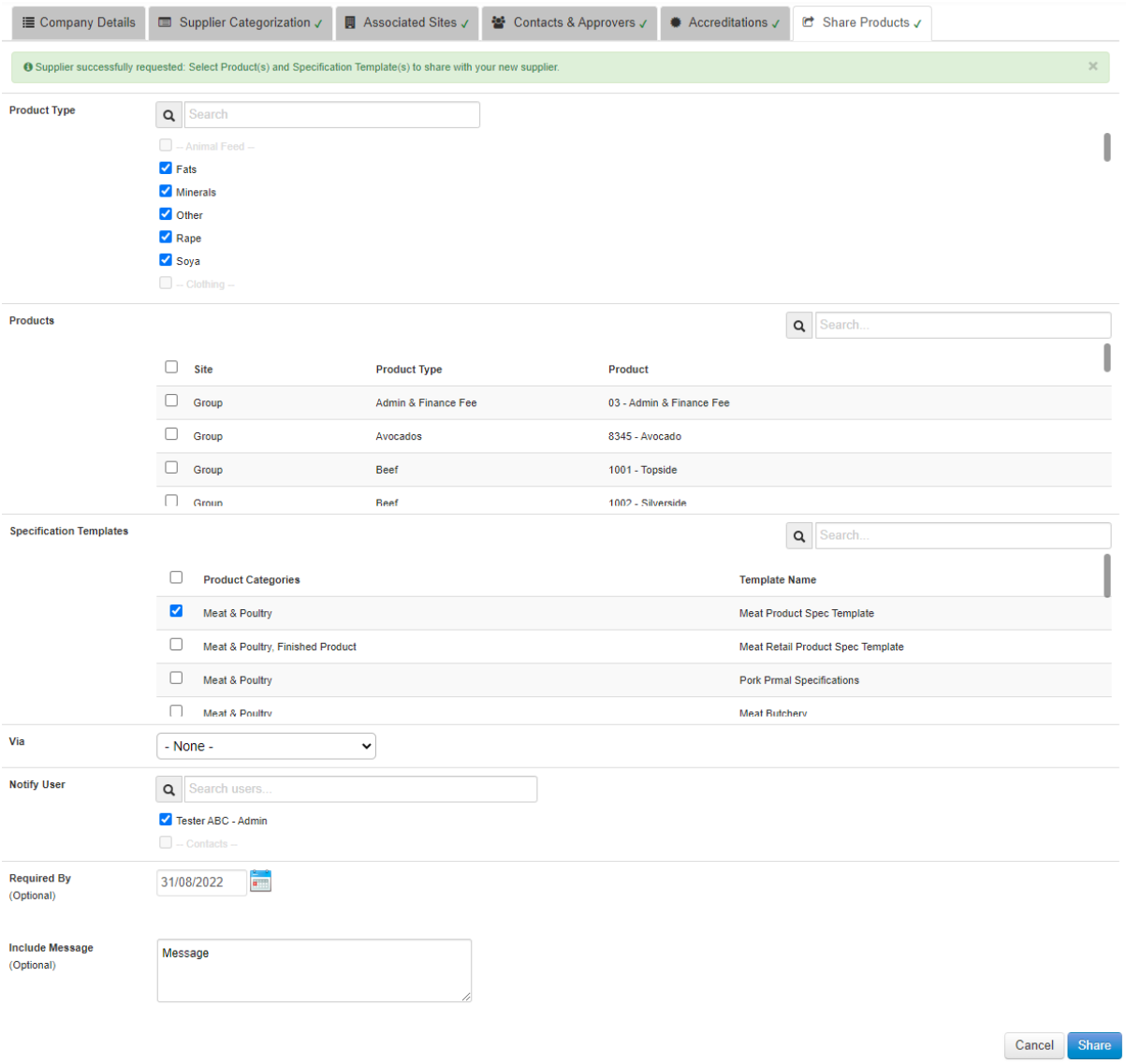
Step 5: Accreditations - If the supplier doesn't have any **3rd Party Accreditations** select no. But if they do select **Yes**. Fill in the details. Select **Confirm & Add Supplier**



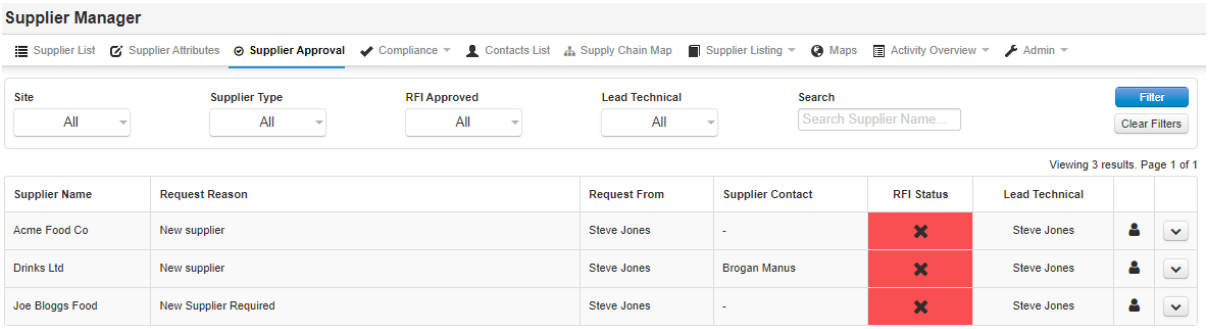
Step 6: Share Products – Ability to share products with suppliers after they have been requested. When you add a new supplier you can share products & spec templates with them in one go instead of retrospectively doing this.

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



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

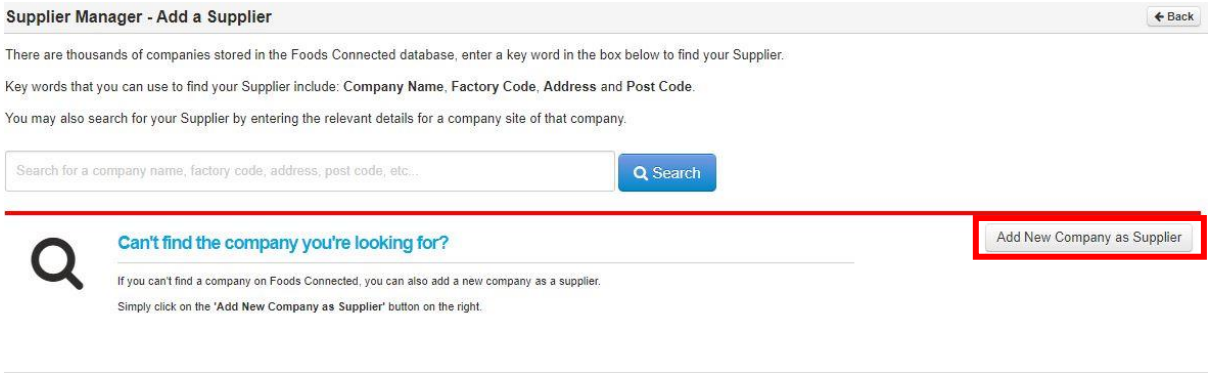


Or If the Supplier Approval Process is not activated the supplier will now drop into your supplier list.

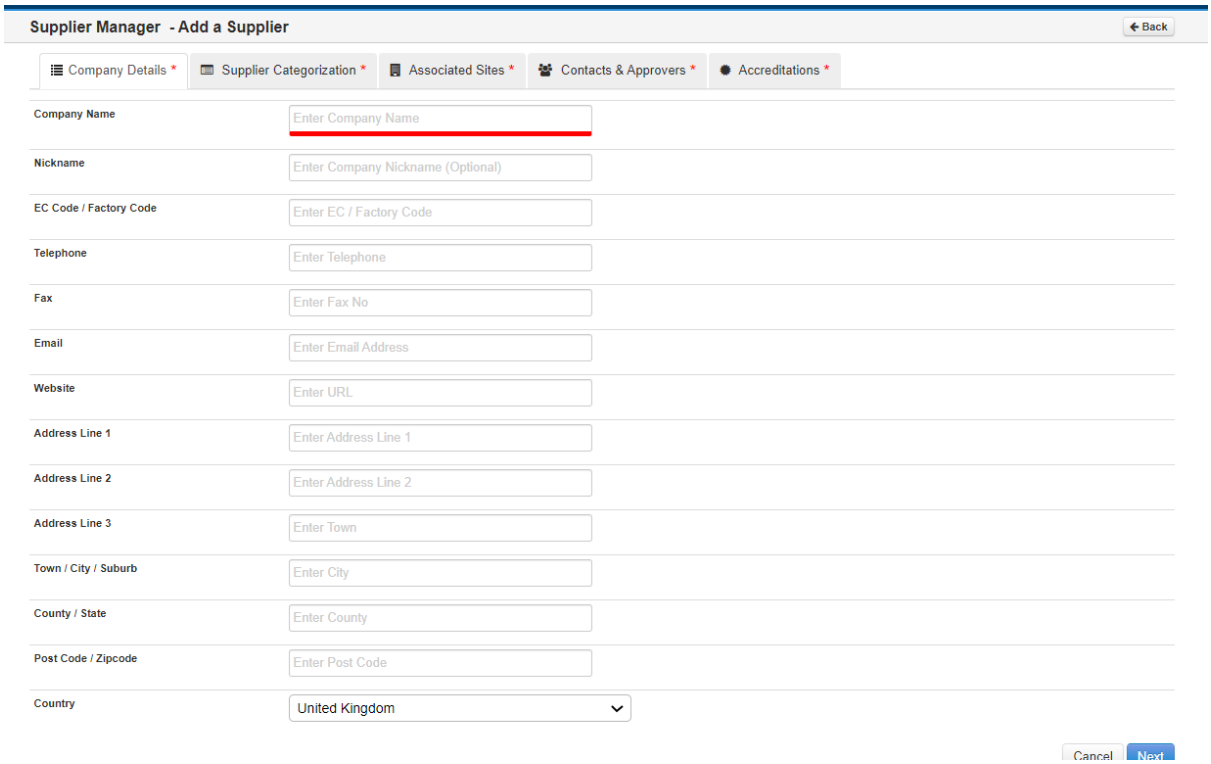
2.1.2 SUPPLIER DOESN'T EXIT IN THE DATABASE

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.

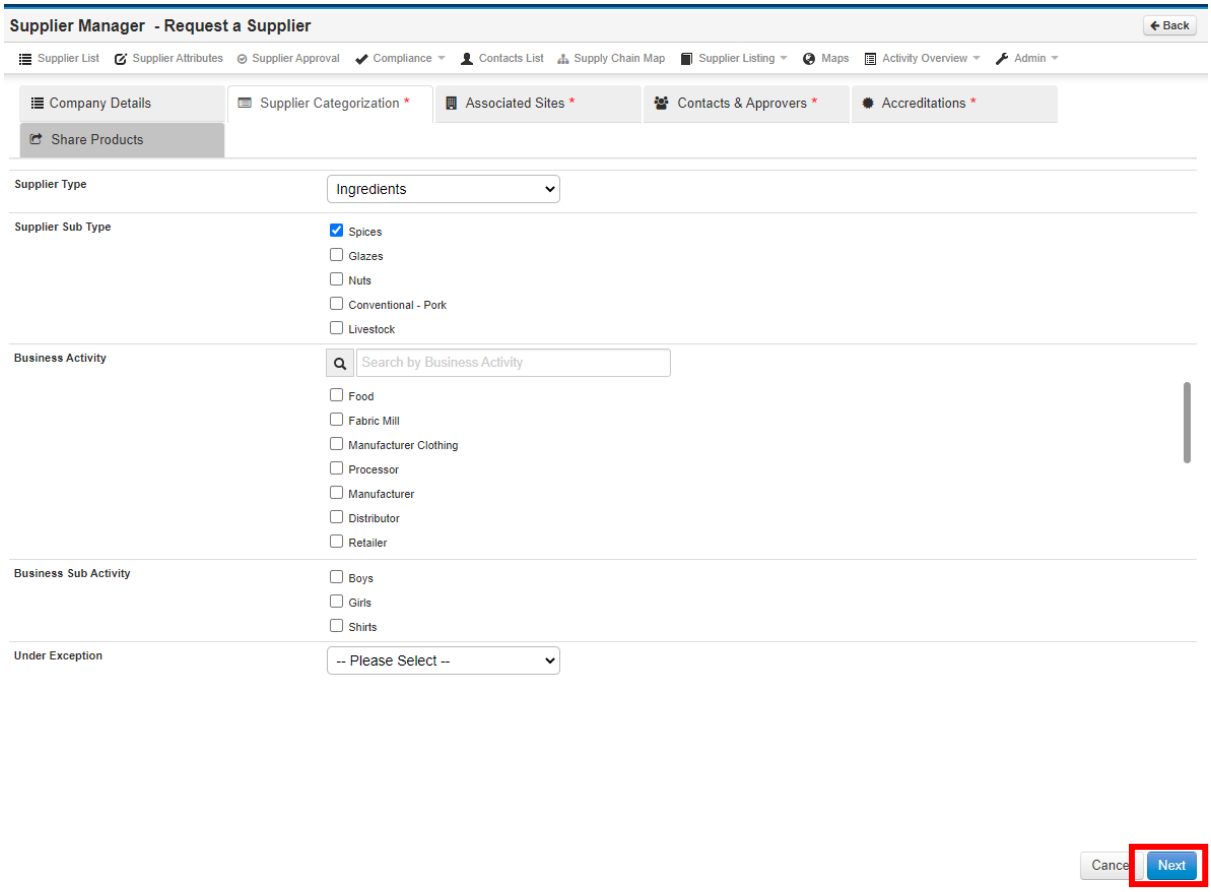
Step 1: If supplier is not there select **Add New Company as Supplier**



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

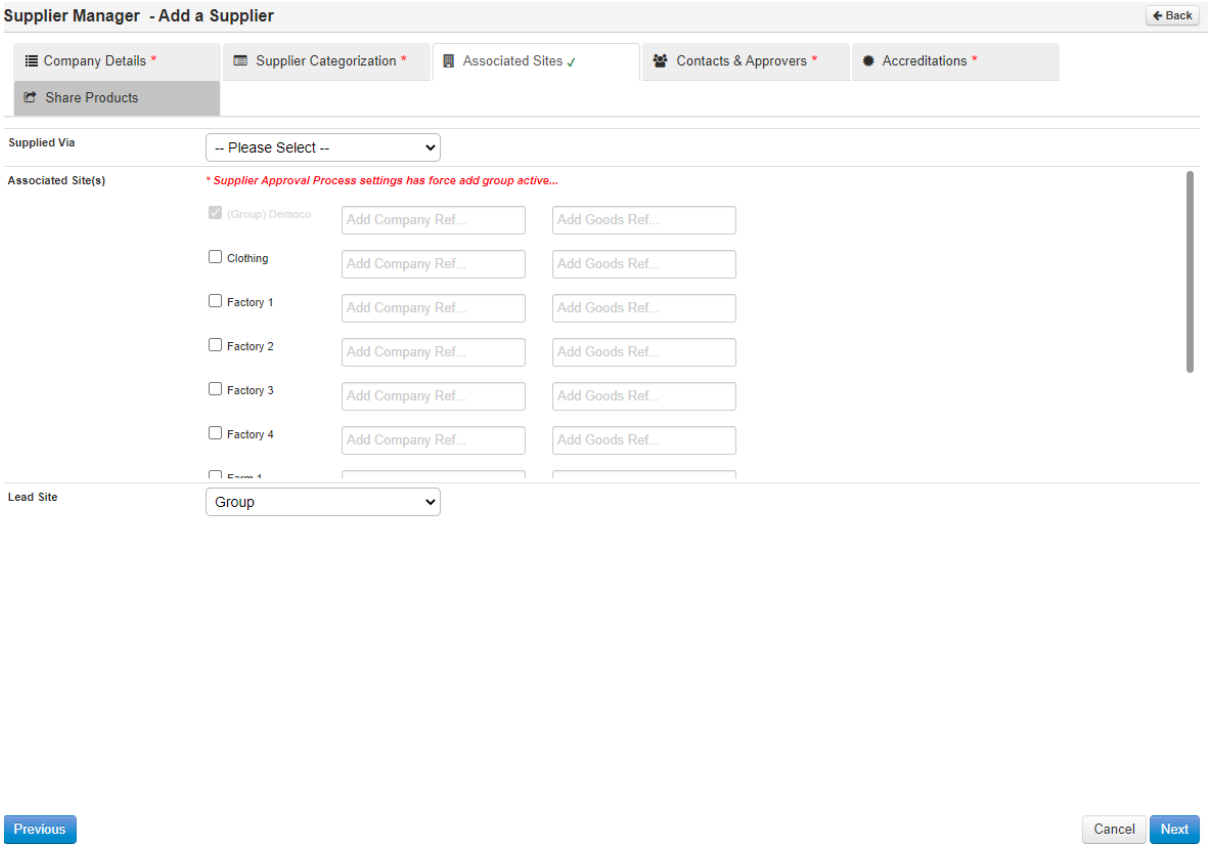


Step 2: Supplier Categorisation - Now select the Supplier Type, Sub Type etc. These are the fields that you activated & setup in the Initial Setup stage. Select **Next** when done



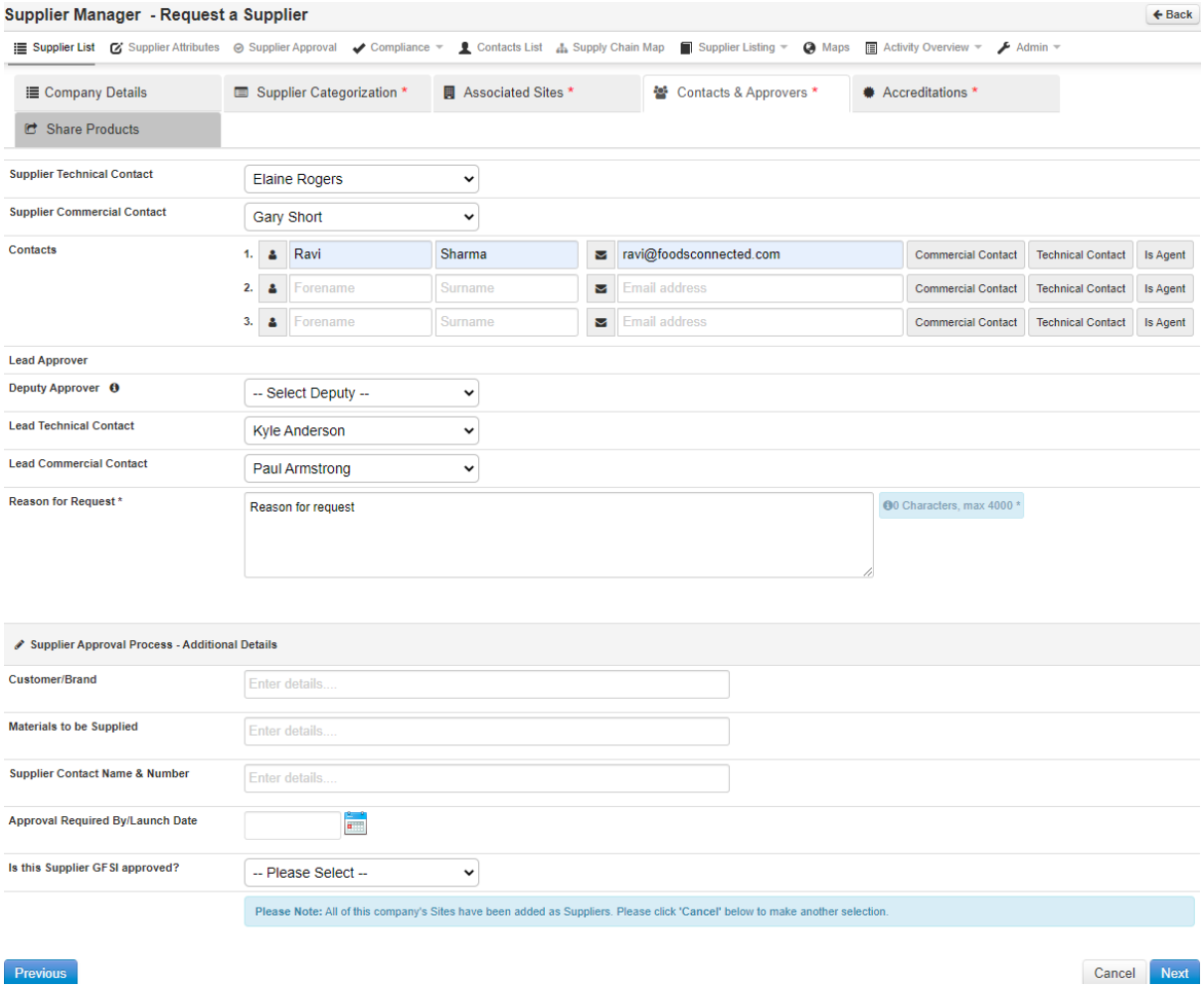
Step 3: Associated Sites - Now select the below

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.
Associated sites: Select your sites that the supplier supplies into
Lead Site: Select your lead site



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.



Step 5: Accreditations - If the supplier doesn't have any **3rd 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	

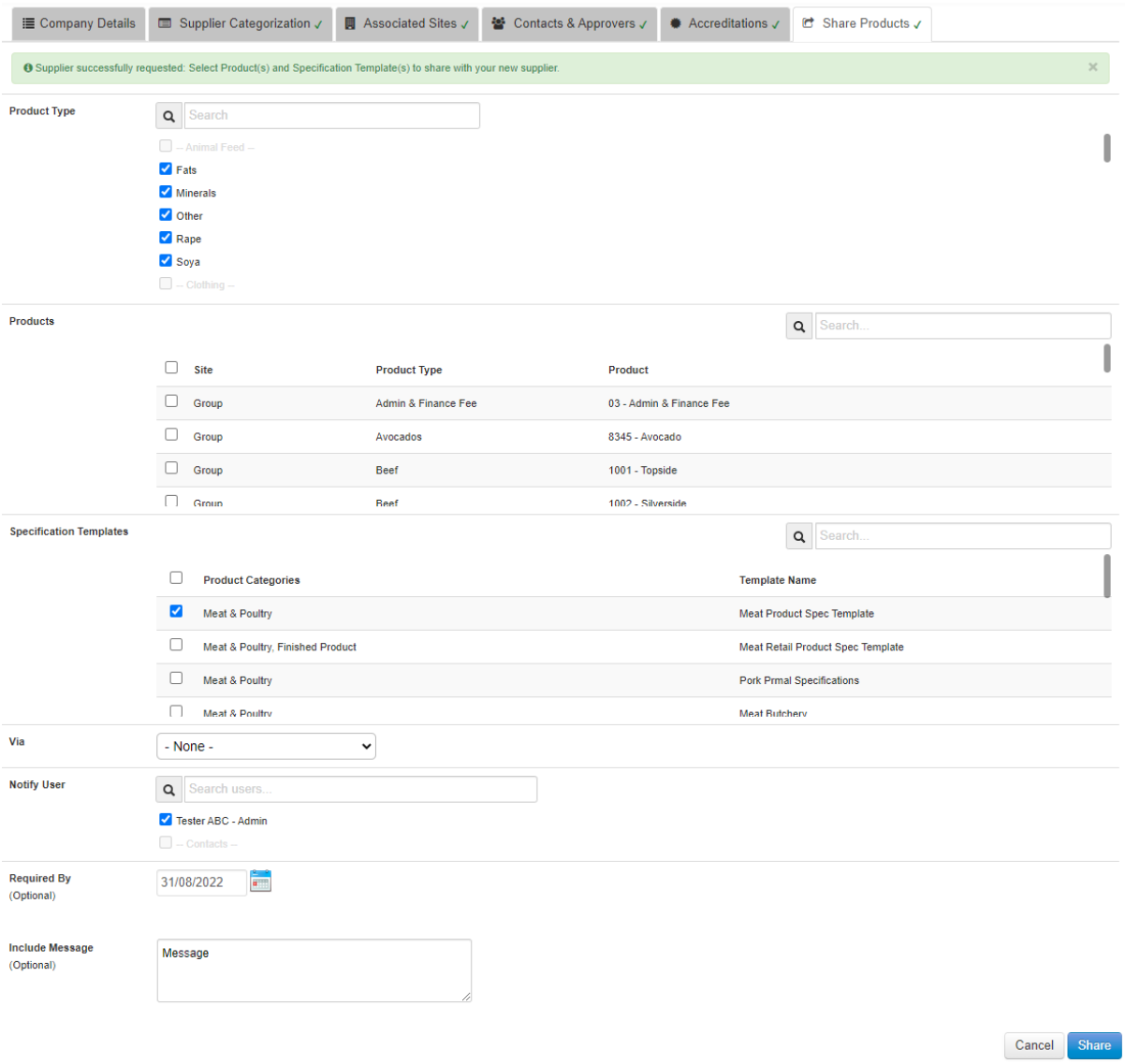
Previous

Cance | Confirm & Add Supplier

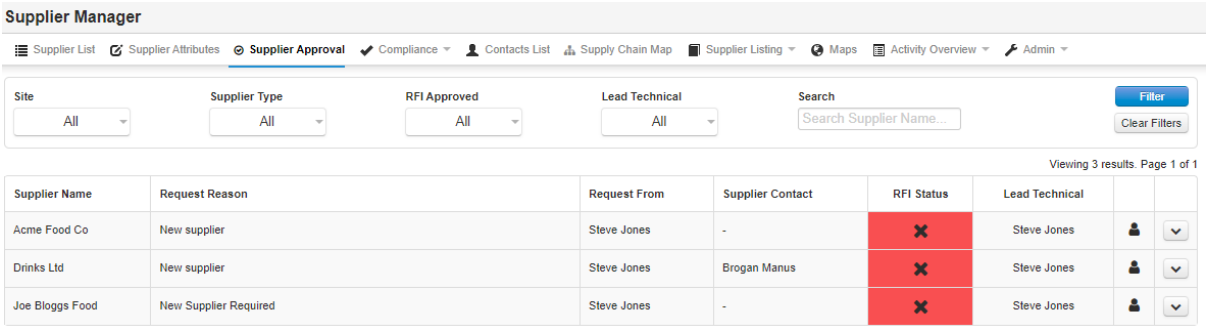
Step 6: Share Products – Ability to share products with suppliers after they have been requested. When you add a new supplier you can share products & spec templates with them in one go instead of retrospectively doing this.

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



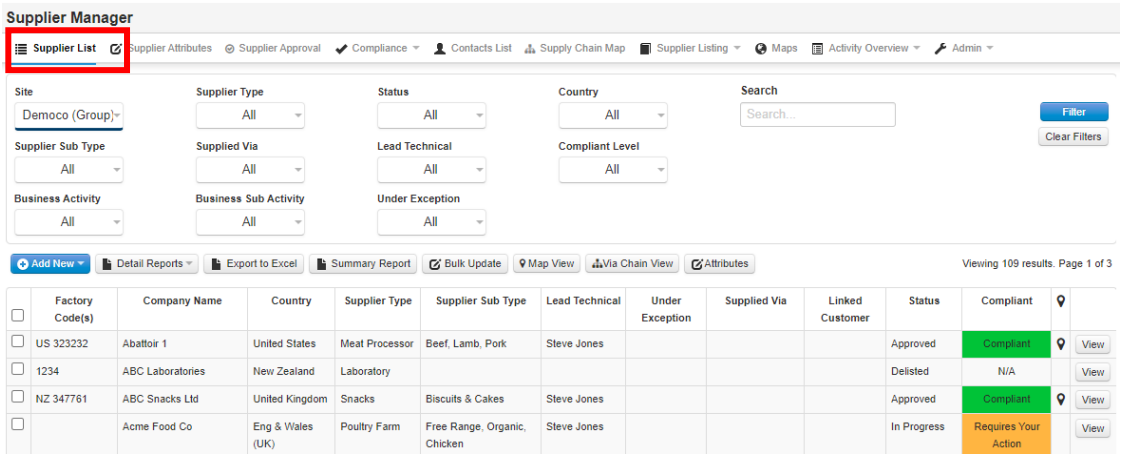
Step 7: If the Supplier Approval Process is activated then the supplier will now sit in the Supplier Approval Tab. Like this below



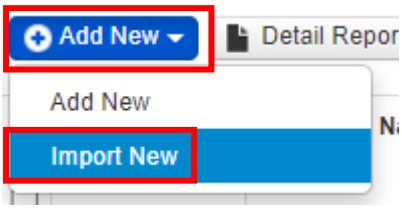
Or If the Supplier Approval Process is not activated the supplier will now drop into your supplier list.

2.2 IMPORTING SUPPLIERS

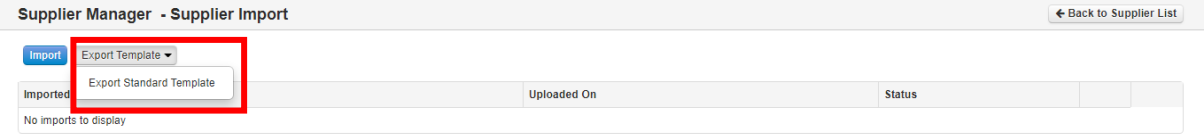
Step 1: Go to the **Supplier Manager** under the Supplier Approval Tab select **Supplier List**



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



Step 3: Export the template for Importing.



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 Numb
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.

Company Name	Site Name	Global Gap Numb	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 Lin	Address Line 3	Town	City	County	Post Code	Country	Latitude	Longti	Technical Contac	Technical Contact Email
Direct supplier 1			Pol. Ind. Principe de Gales,	S/N		Isla Mayor	Seville		41140	Spain			John Smyth	john.smyth@supplier.com
Direct supplier 2	Agent 1		3E/7 Pho Quang Street	Ward 2	Tan Binh District		Ho Chi Minh Ciry			Vietnam				
Agent 1			N1 Road	Lot B	An Nghiep Industrial Zone			Soc Trang Provice		Vietnam			Frank Brown	frank.brown@agent.com

- **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

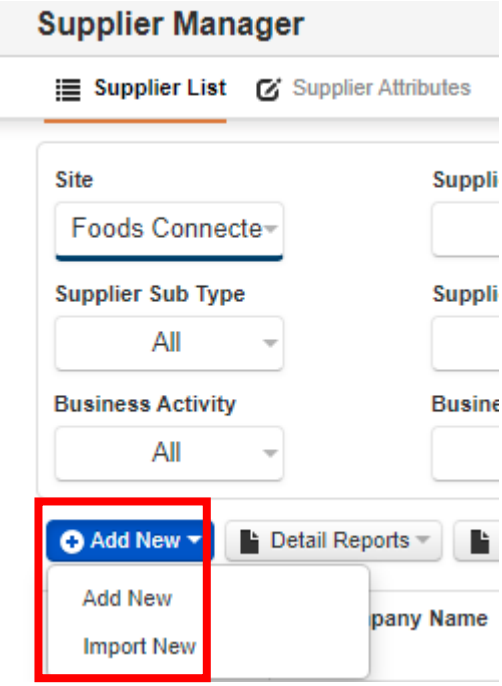
- Check that any of the customers sites added to **Associated Sites** are spelt correctly exactly like in FC.

- Check that any of the Agents added to **Via Company Name** are spelt correctly exactly like on the sheet

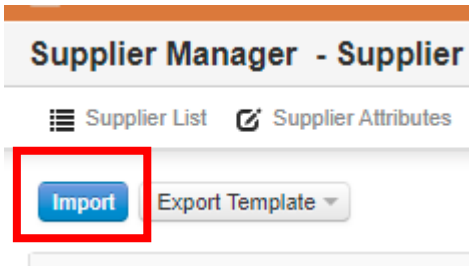
- Make sure **Post Codes** are added

- Check that tech contacts URL of mail matches their company name.

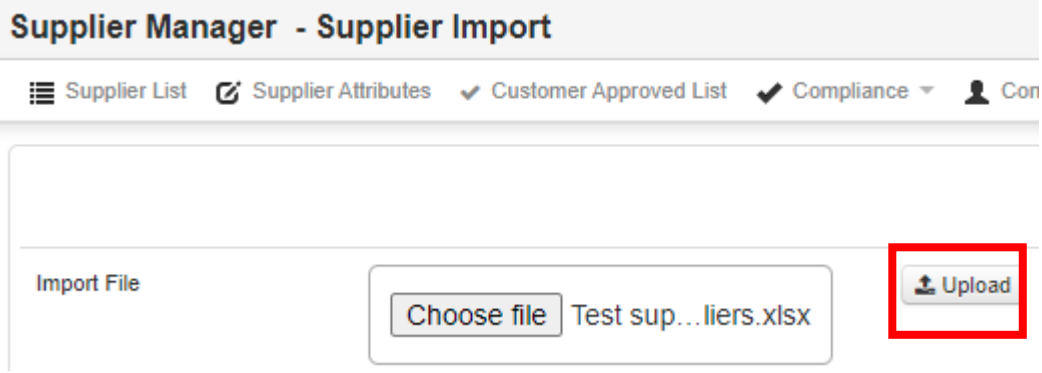
Step 5: Now import your suppliers in the front end by selecting **Add New > Import New**



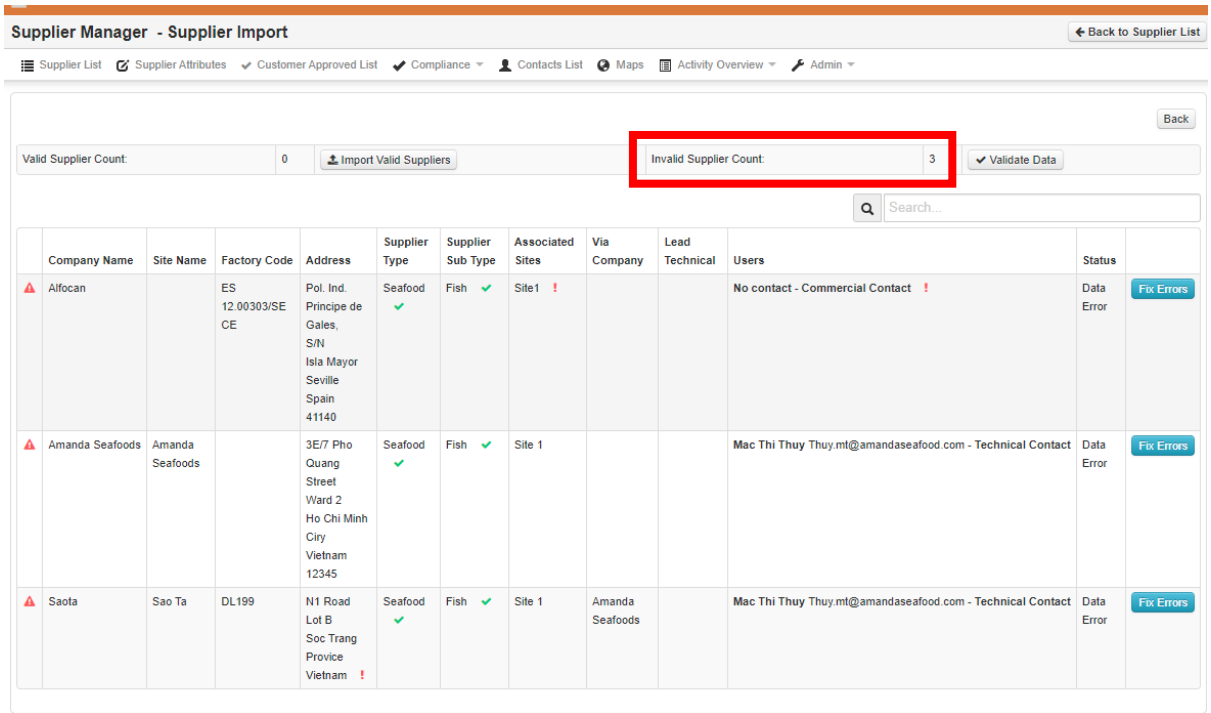
Step 6: Select **Import**



Step 7: Add file & **Upload**

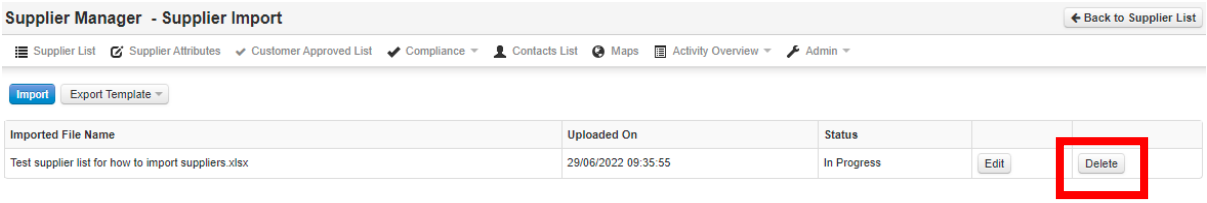


Step 8: Now validate the suppliers that haven't got the correct data for FC. You can see as they have a red warning sign & a red exclamation mark beside where the data is missing. Looks like this below.

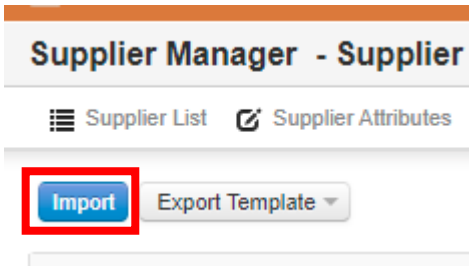


Step 9: To correct each supplier you can select **Fix Errors** then save.

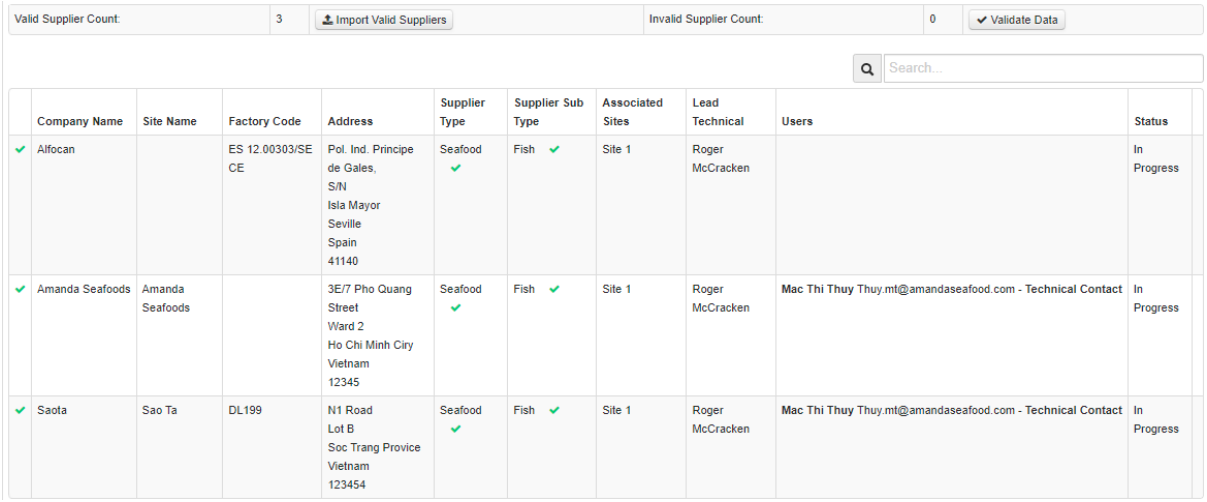
Or you can go back to your supplier sheet amend there. Then delete out your in-progress import.



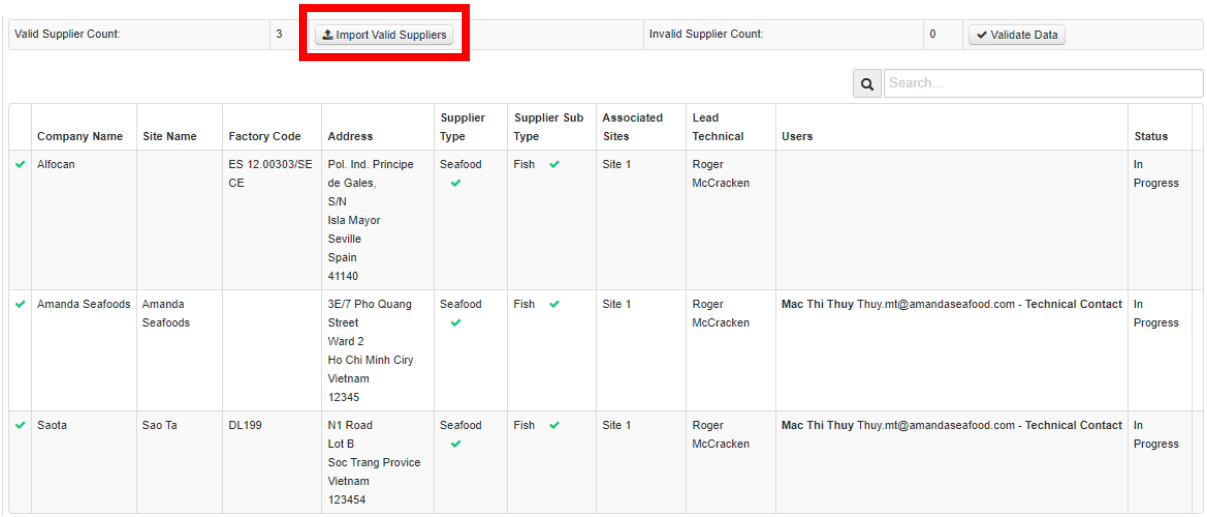
Then reimport again.



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



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



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

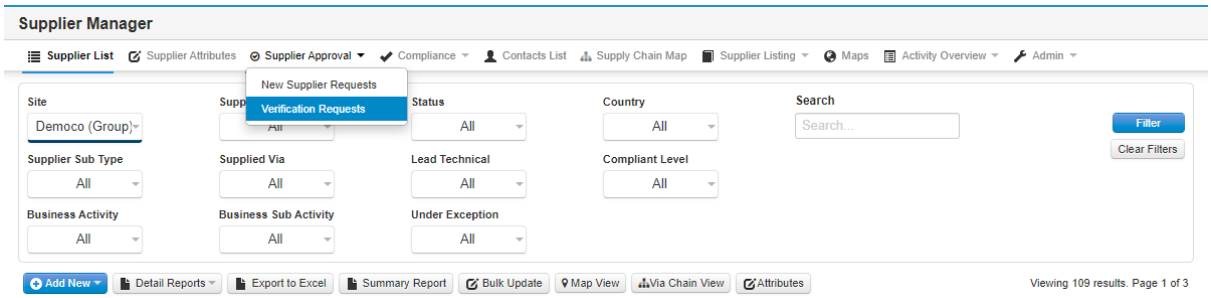
The Supplier Approval Process: Allows you to create a specific process & rules in Foods Connected to approve your suppliers. They will sit in this tab until they are fully approved then they will drop into your main supplier list.

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

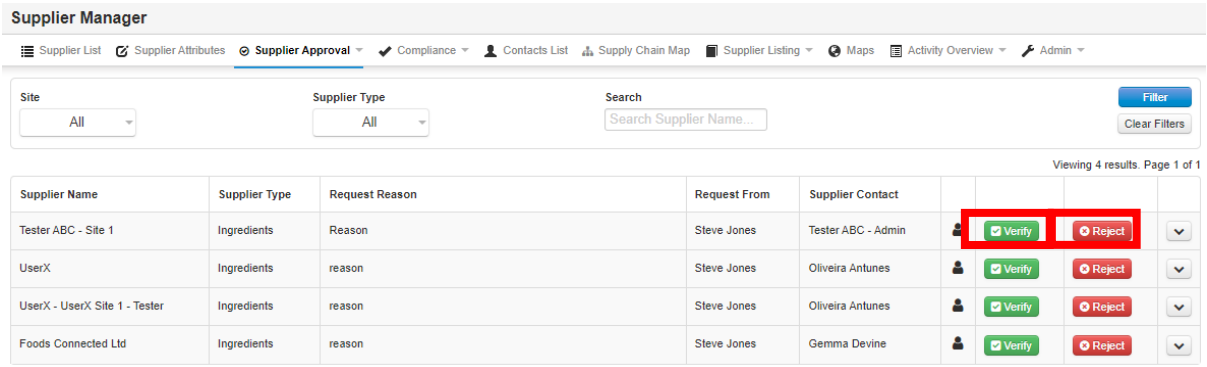
3.1 VERIFICATION REQUESTS – HOW TO VERIFY

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.

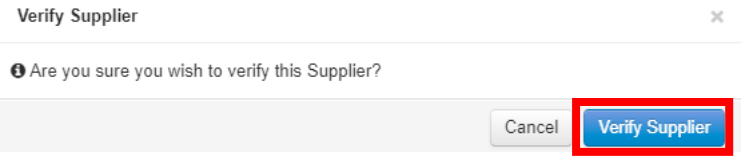
Step 1: Go to **Supplier Manager** > **Supplier Approval** > **Verification Requests**



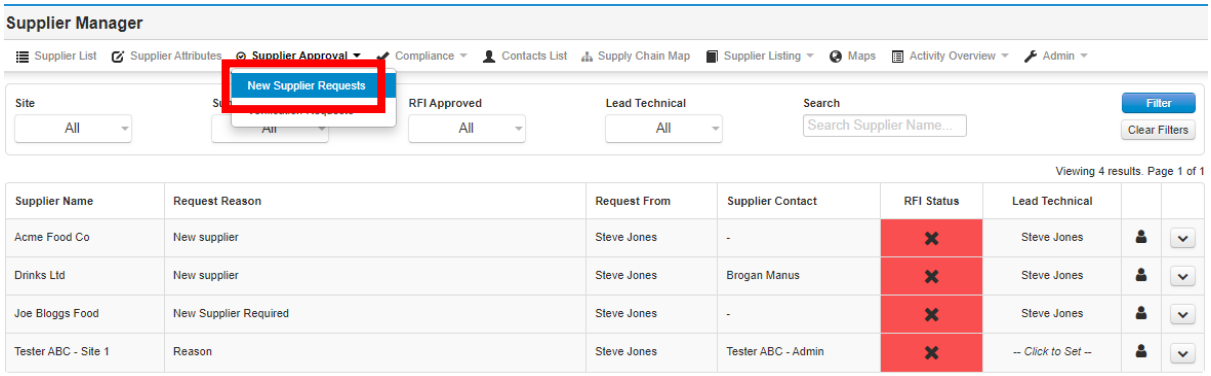
Step 2: To verify select **Verify** & to Reject the supplier select **Reject**



Step 3: Select **Verify Supplier**



Step 4: Your supplier now appears in the **New Supplier Request** tab under Supplier Approval



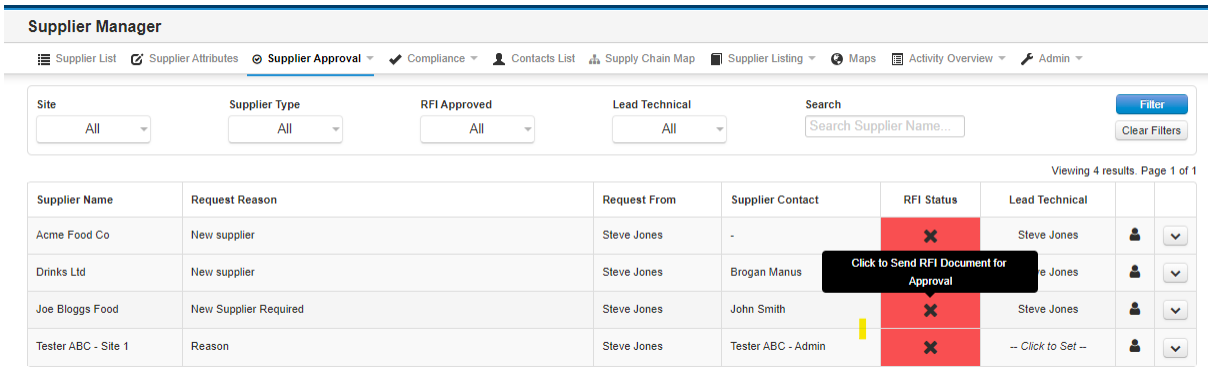
3.2 NEW SUPPLIER REQUESTS/ SUPPLIER APPROVAL – HOW TO USE

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.

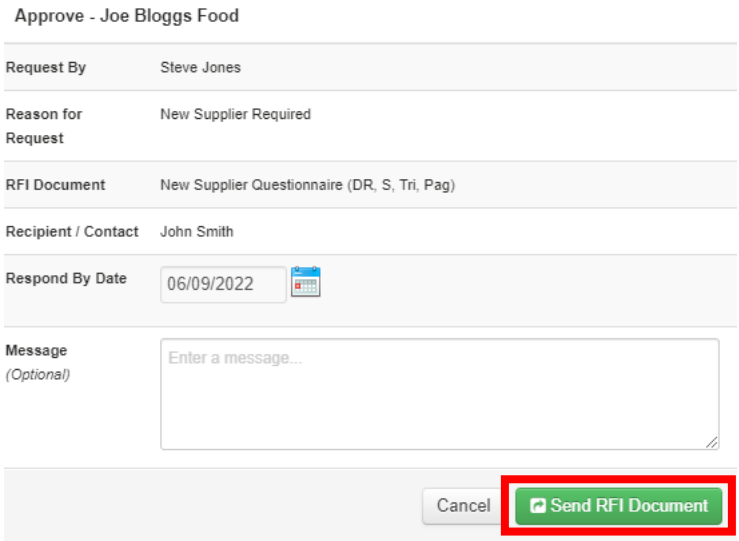
This where you can monitor their process on being approved on the rules that you setup. If you have setup automatic requests for documents, send questionnaires etc you just need to wait for your suppliers to complete request. If you haven't setup automatic request you need to manually do these requests 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



Step 2: Now select **Send RFI Document**



Step 3: Once sent the RFI status will now look lime this below.

Step 4: Once that RFI has been completed the status will look like this below

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

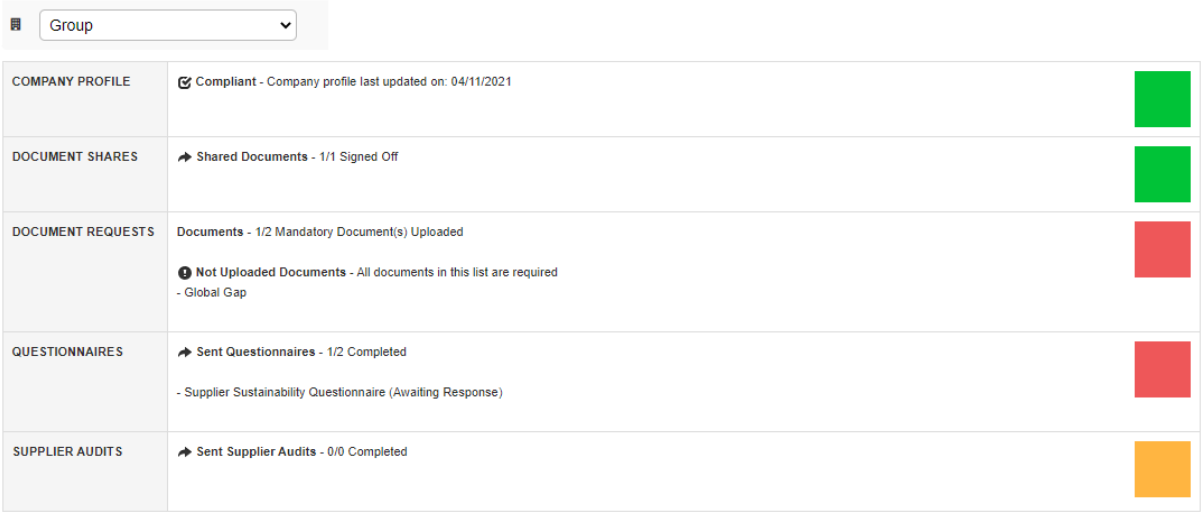
COMPANY PROFILE	**Non-compliant** - Company profile last updated on: **Never Updated**
DOCUMENT SHARES	**Shared Documents** - 0/0 Signed Off
DOCUMENT REQUESTS	**Documents** - 0/0 Mandatory Document(s) Uploaded
QUESTIONNAIRES	**Sent Questionnaires** - 0/0 Completed
RISK ASSESSMENTS	**Sent Risk Assessments** - 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...*

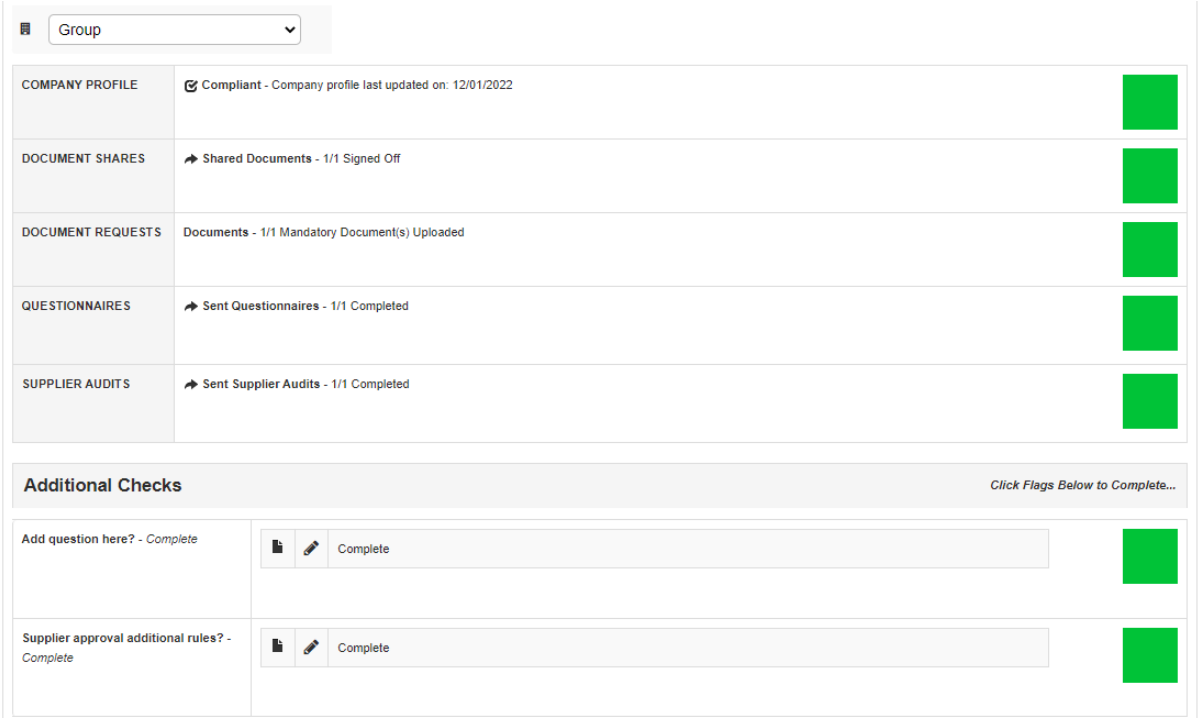
Add question here? - *Incomplete*	*Add Additional Comment Upon Completion...*
Supplier approval additional rules? - *Incomplete*	*Add Additional Comment Upon Completion...*

Decline

Step 2: As the supplier completes requests, the approval tabs will turn green like below



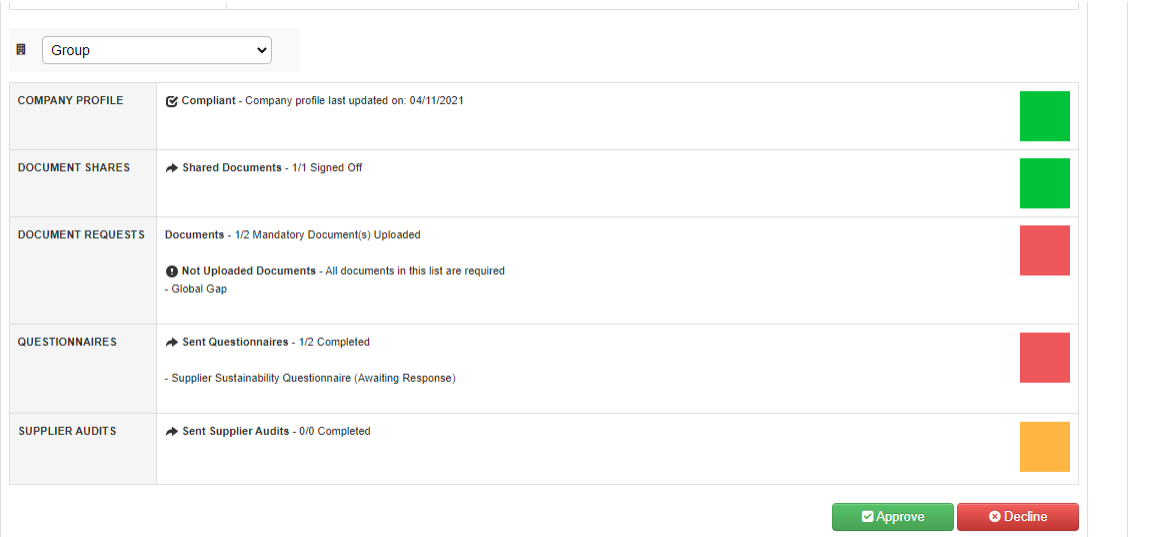
Step 3: Now that all the tabs are green



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

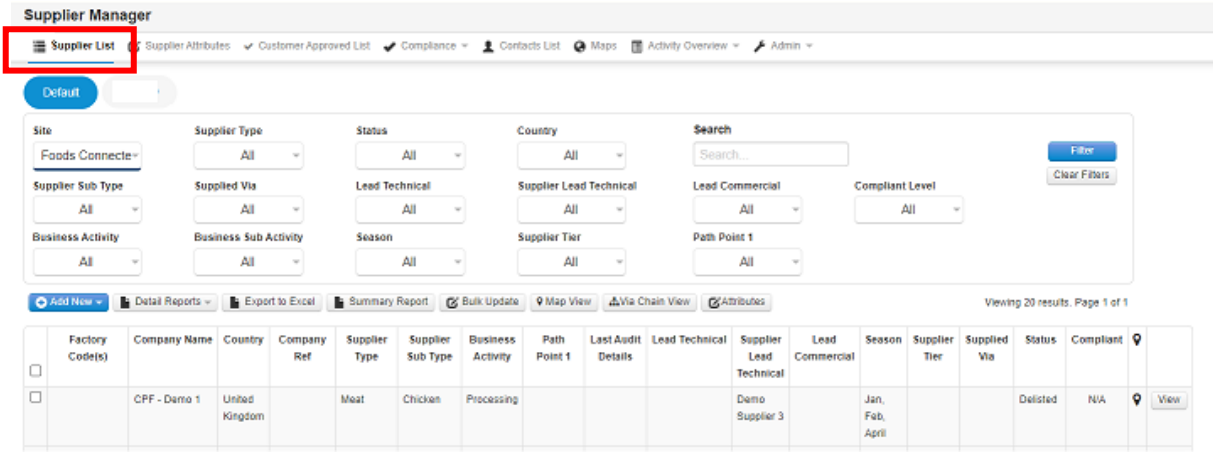
If you have the **Compliancy Override** turned on in the **Supplier Approval Admin** > **General Settings 1.4.1** you will see the **Approve** button like below when your supplier sits in the Approval Process. This means that if at any stage you just want to override the supplier approval process and set supplier as approved just select Approve. They will then drop into your main supplier list.



4. ACCESSING YOUR SUPPLIER LIST

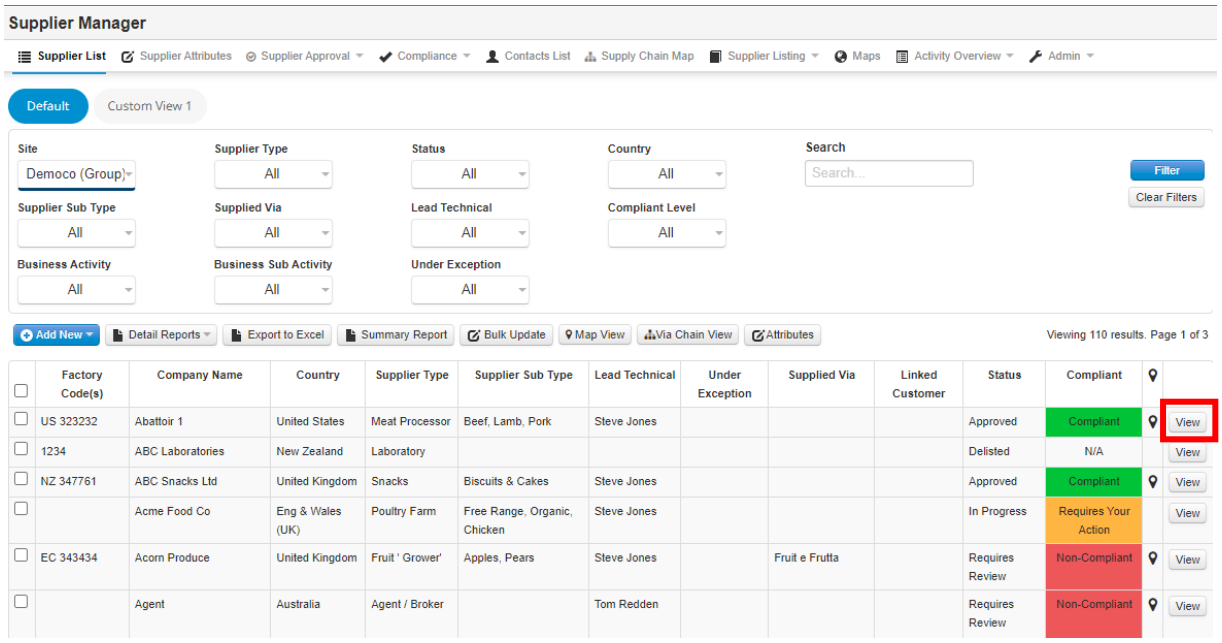
Step 1: From the **Supplier Approval** menu at the top of the page, select **Supplier Manager**

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.



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.



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

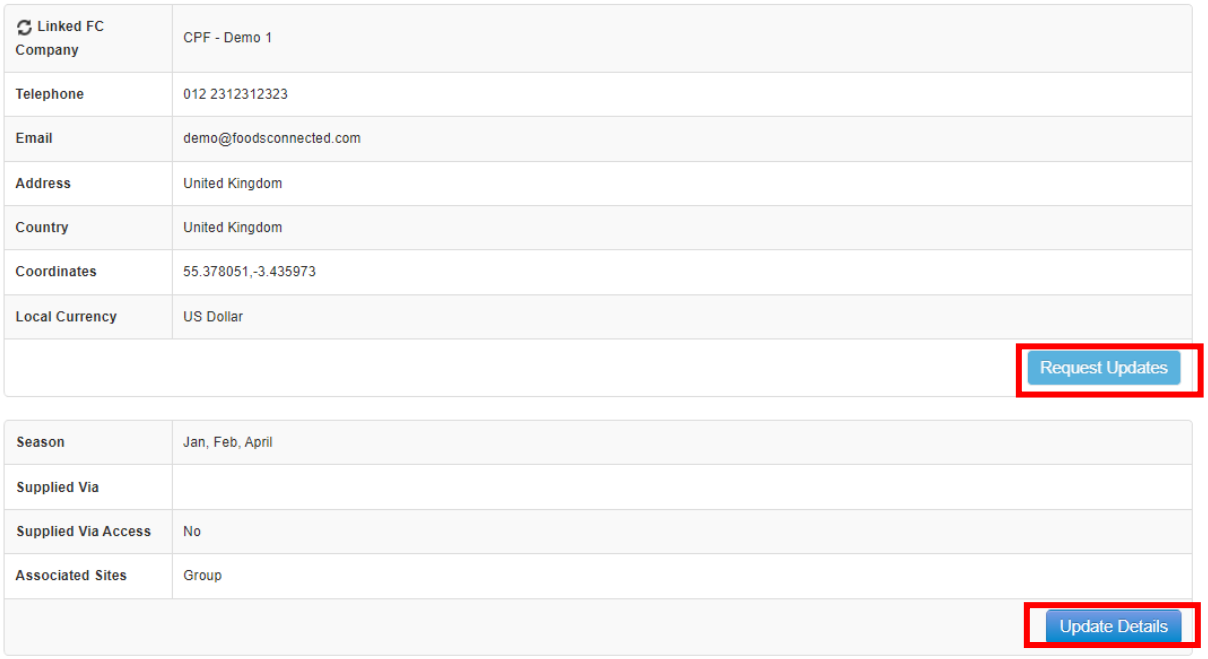
Notes: Any specific notes you want to hold on the supplier

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

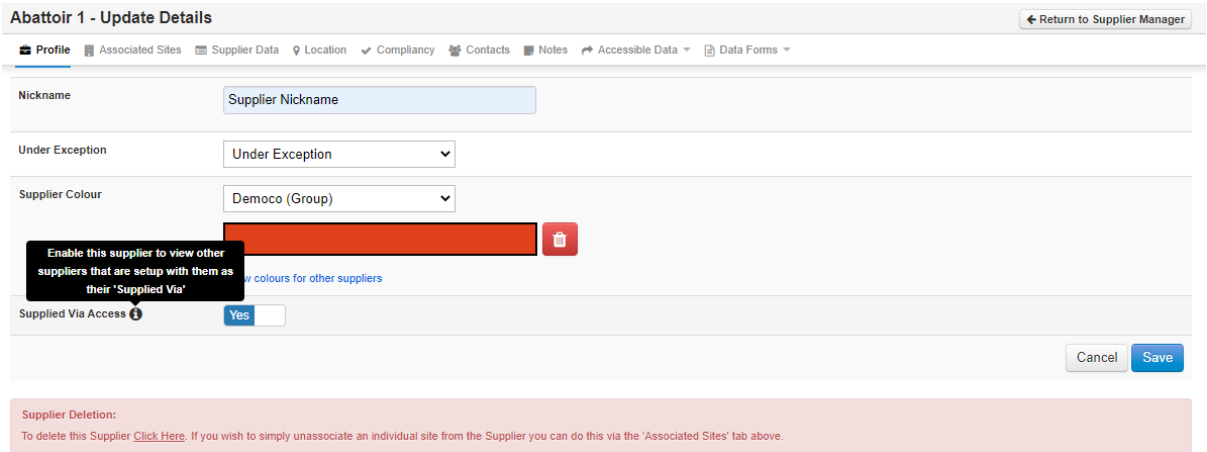
5.1 PROFILE – SUPPLIERS PROFILE & UPDATING DETAILS

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)



Step 2: Update details allows you to access further info. Select **Update Details**

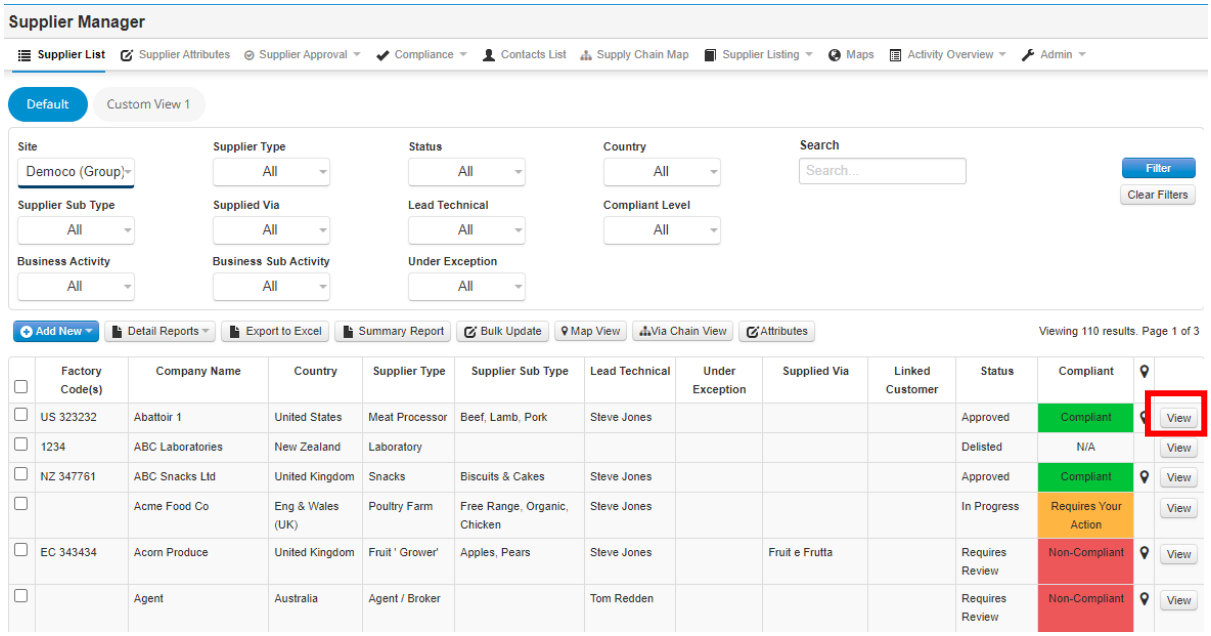
Nickname: Give your supplier a nickname
Custom Fields: Any custom fields you create in point **1.1.3 can be accessed here & options selected.**
Supplier Colour: Colour code your suppliers for widgets
Supplied Via Access: Allows suppliers to see other suppliers that are setup with them as their supplied via
Supplier Deletion: Delete a supplier



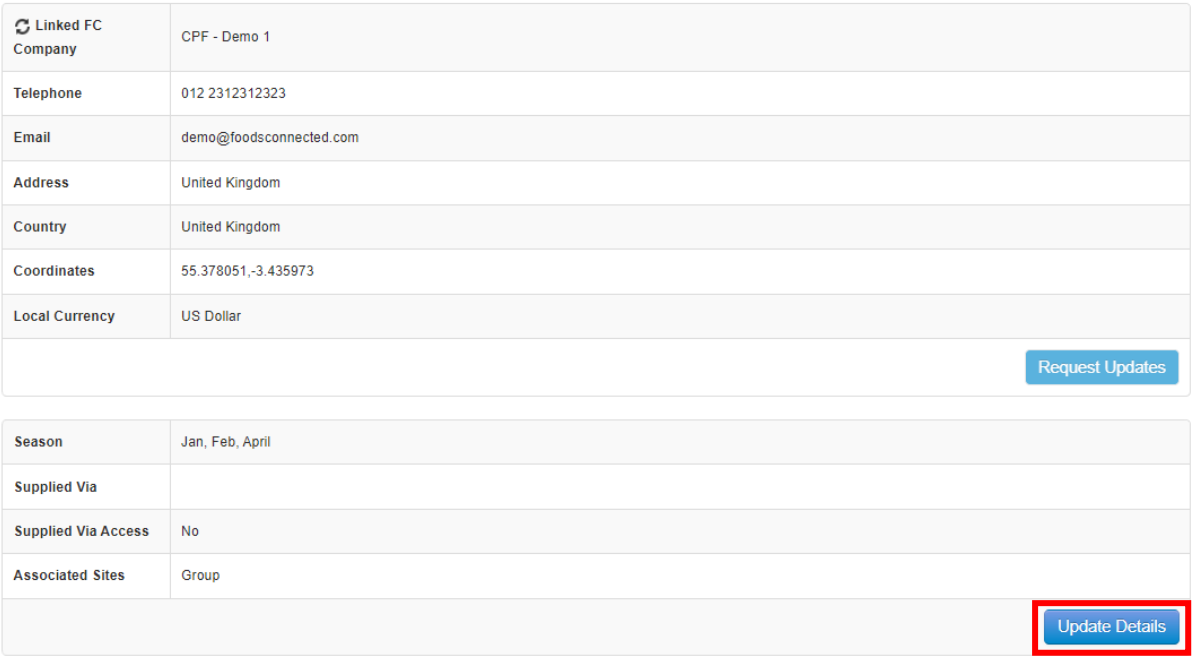
5.1.1 CUSTOM FIELDS – SELECTING OR INPUTTING OPTIONS

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

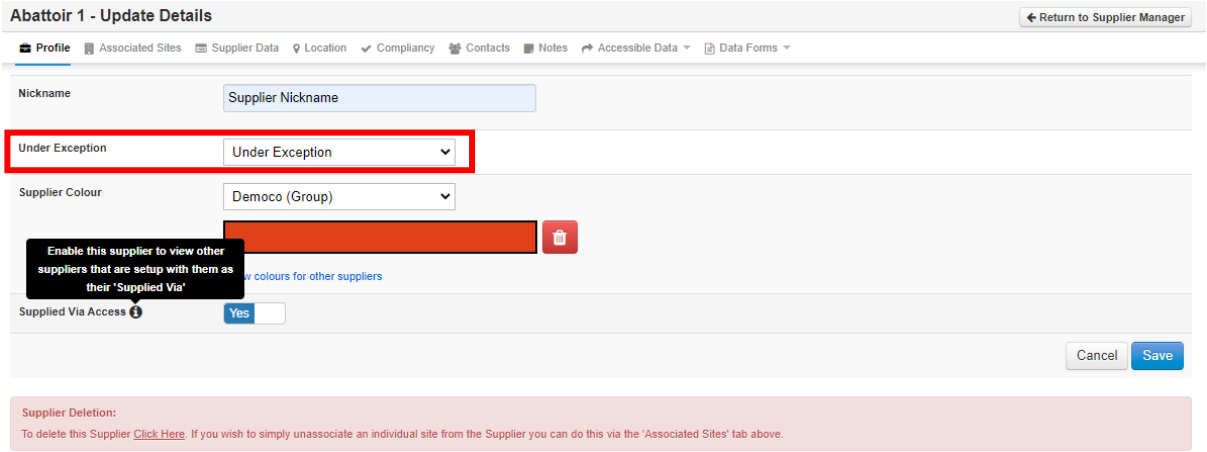


Step 2: Now select **Update Details** on the **Profile** tab



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

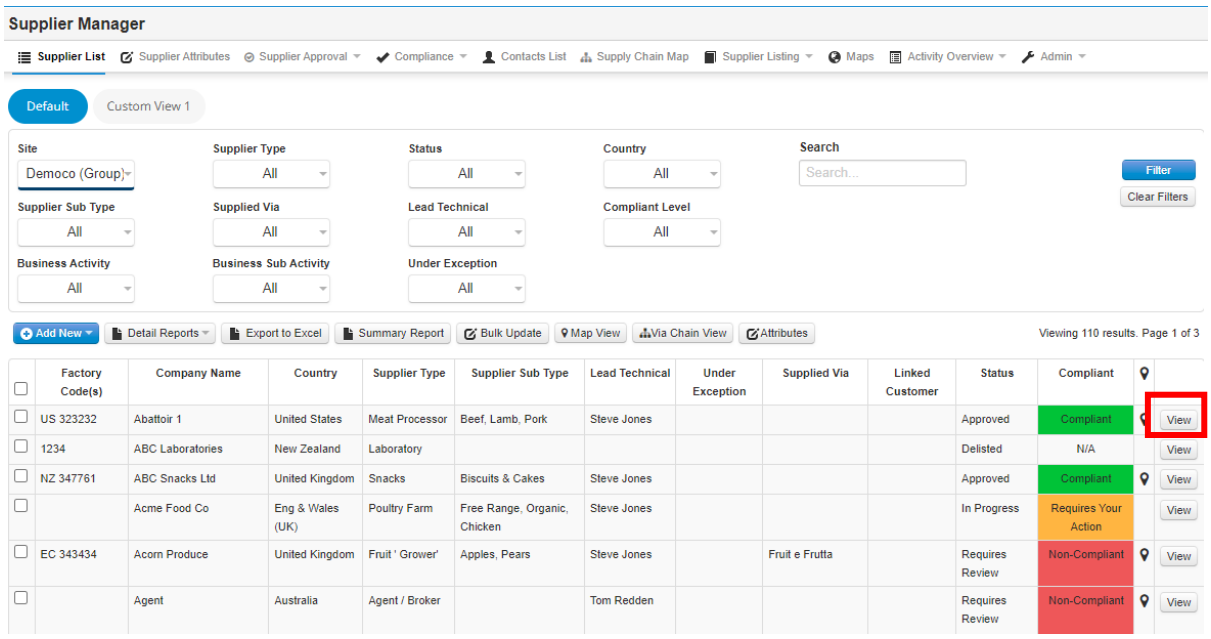
Once done select **Save**



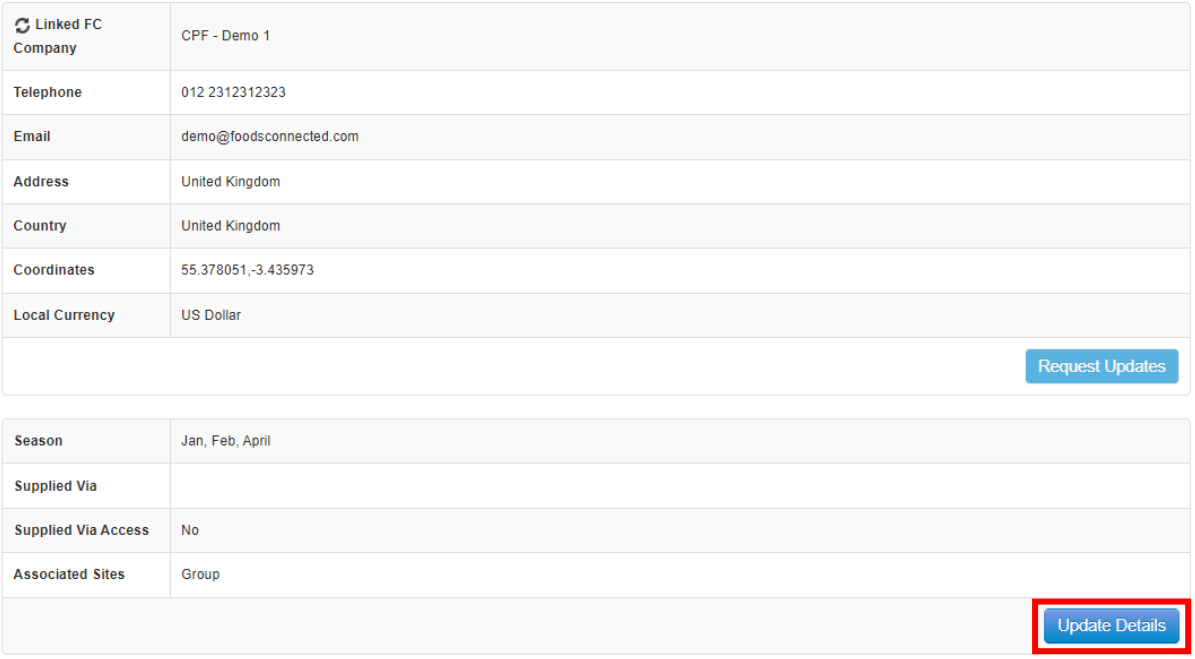
5.1.2 SUPPLIER DELETION – HOW TO DELETE A SUPPLIER FROM YOUR LIST

If you ever need to delete a supplier fully from your list. Please follow the steps below.

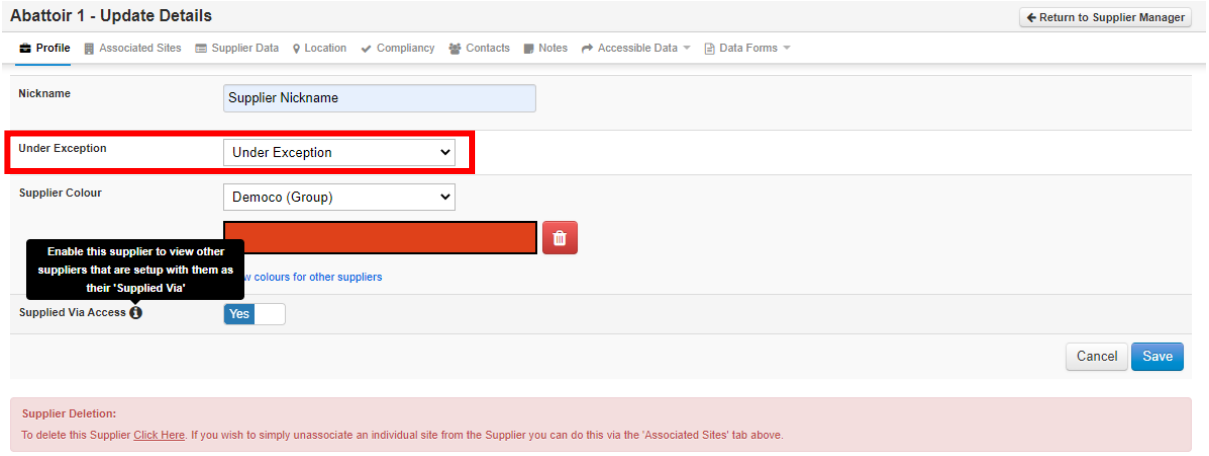
Step 1: Select **Supplier Manager** > Select **View** beside supplier



Step 2: Now select **Update Details** on the **Profile** tab



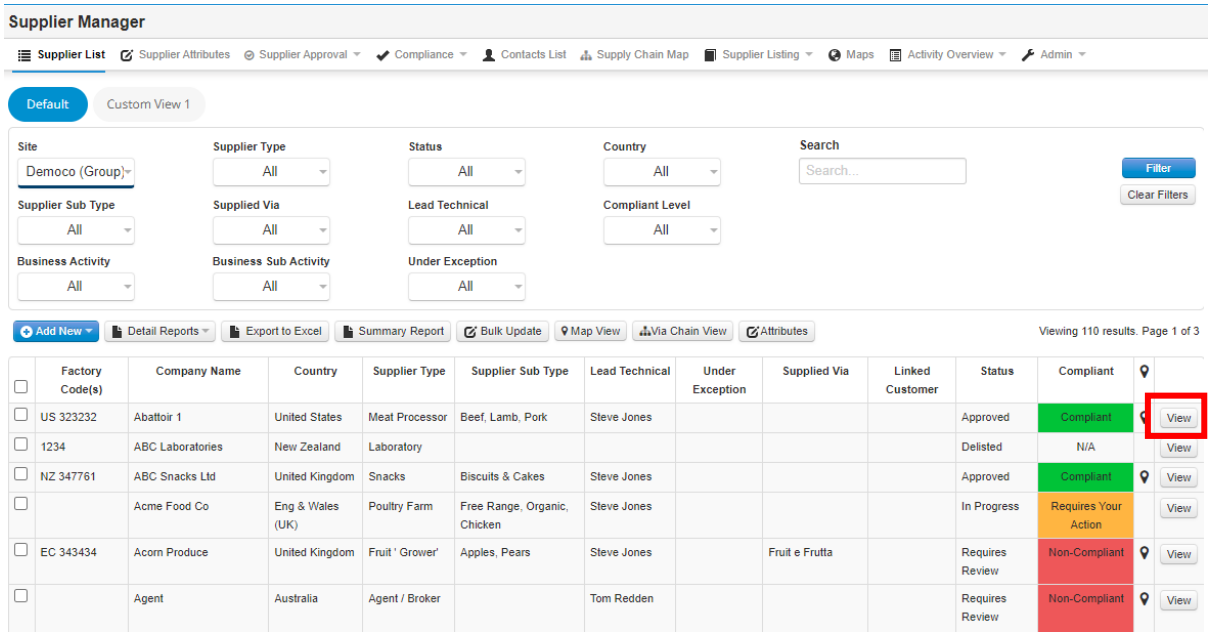
Step 3: You can now see the **Supplier Deletion** option. Select **Click Here** to delete. Then Delete.



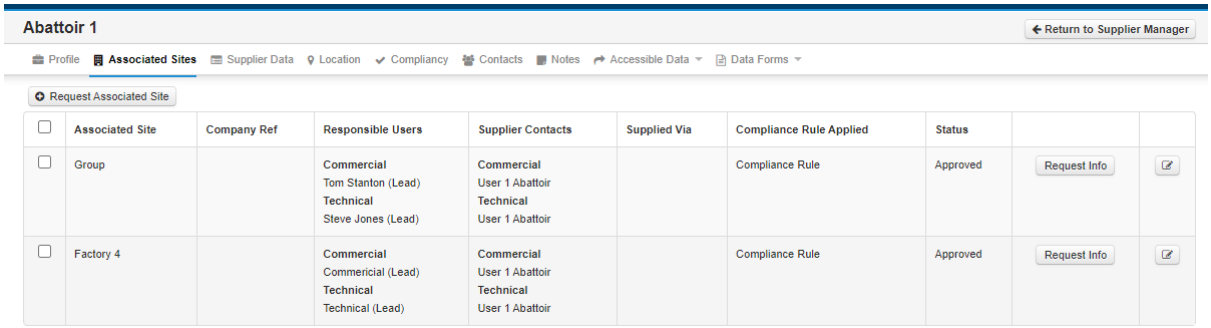
5.2 ASSOCIATED SITES – WHAT THIS IS & HOW TO MANAGE.

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



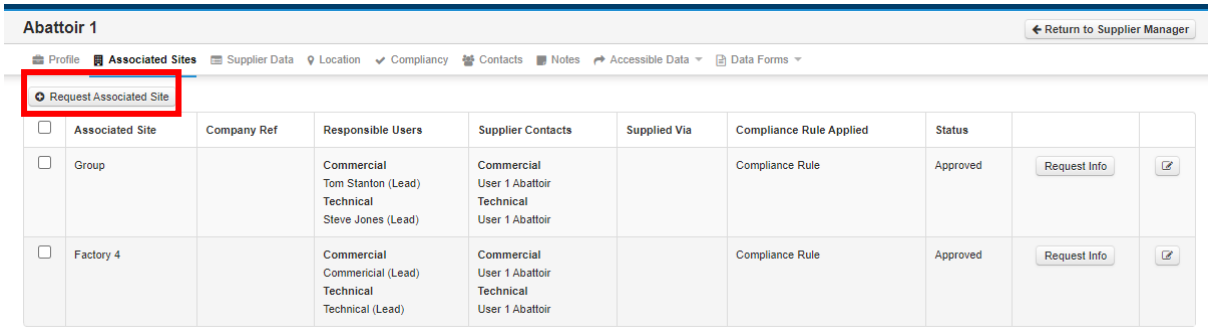
Step 2: Now select the **Associated Sites** tab.



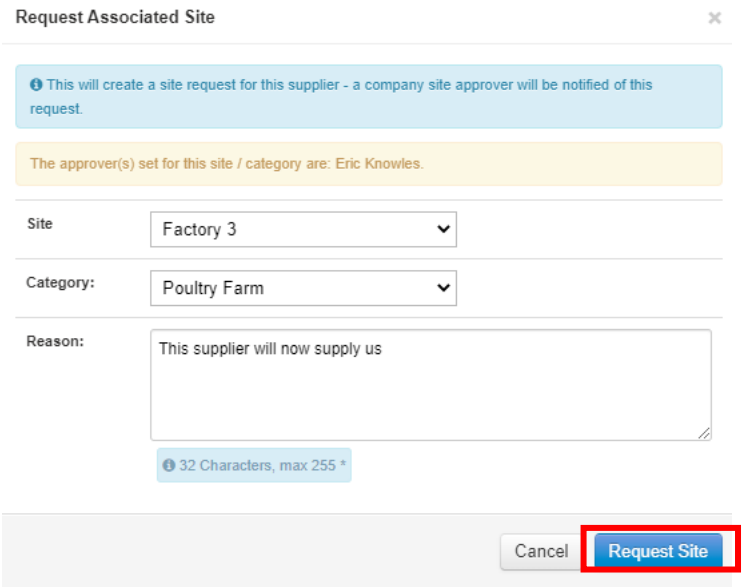
5.2.1 REQUEST ASSOCIATED SITES – IF THE TAB IS ACTIVATED

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.



Step 2: Select your site, Category and comment if necessary. Then **Request Site**

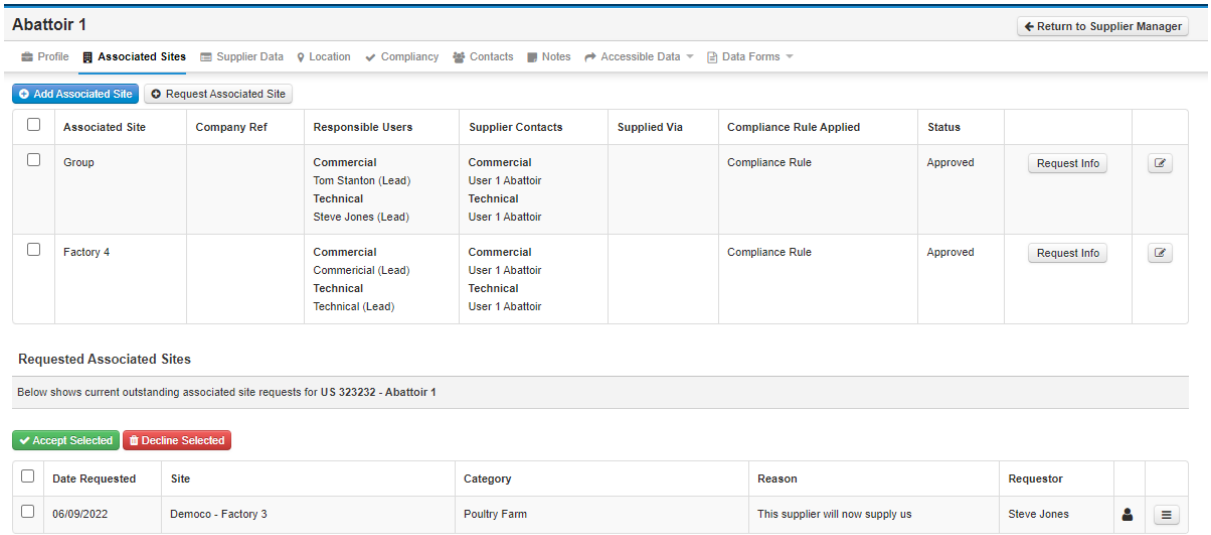


Step 3: This request now goes to the requester setup to approve.

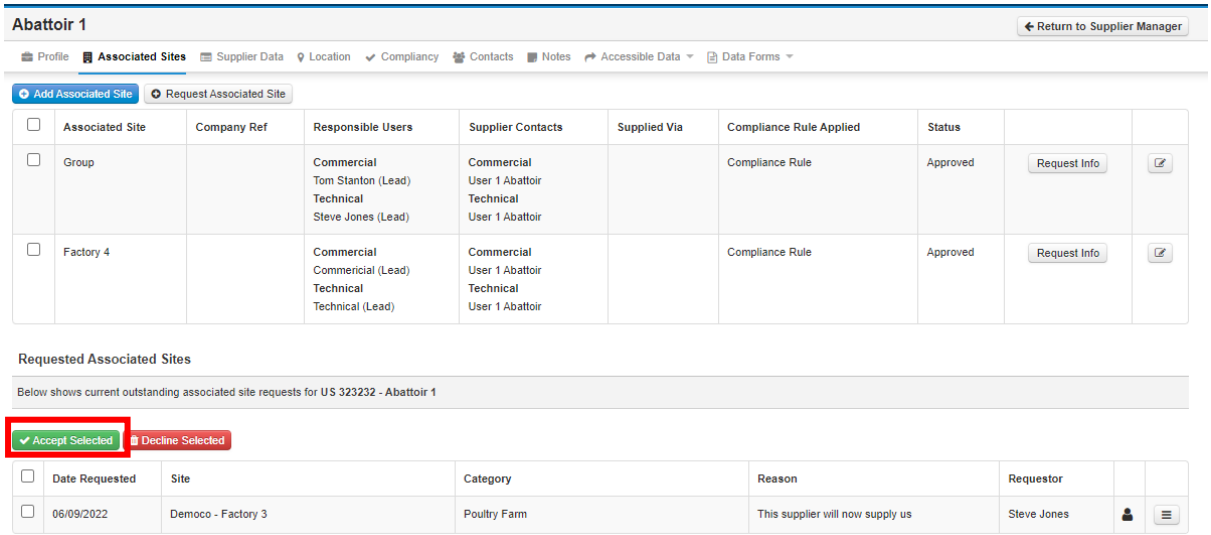
5.2.1.1 Approving or Declining Associated Site Requests – Approver

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

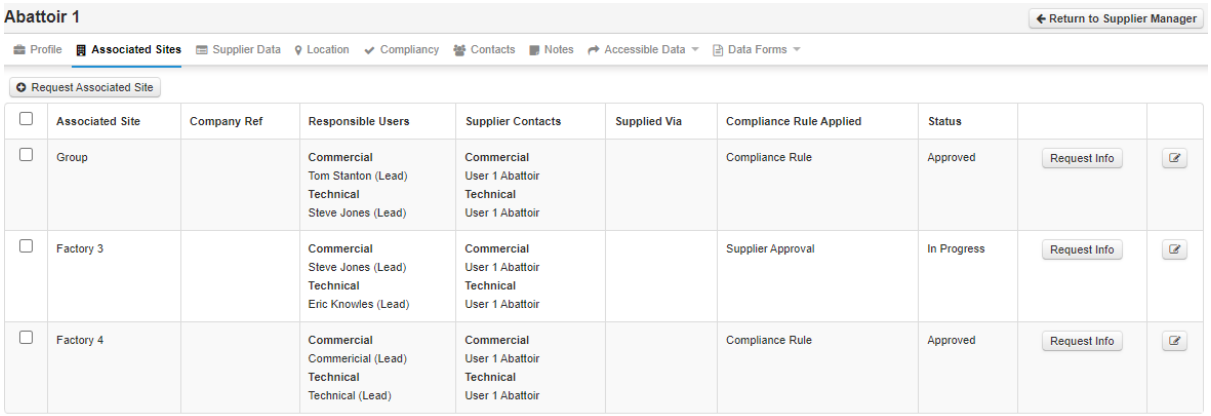
Step 1: Select the task and it will take you to the associated sites tab.



Step 2: Now, if you want to Approve this request select **Accept Selected** or if you want to decline select **Decline Selected**



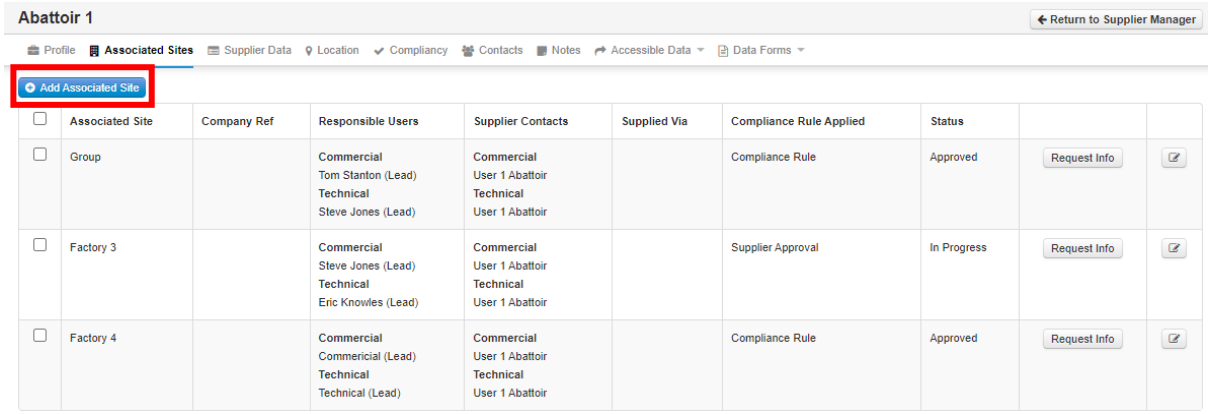
Step3: Once accepted, the new site will now be linked to that supplier.



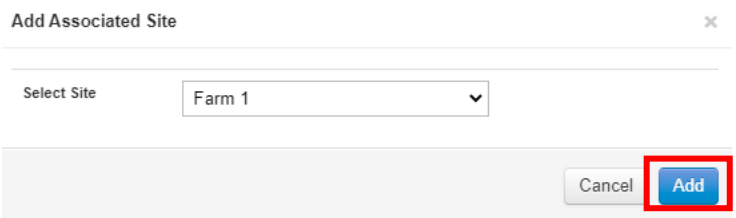
5.2.1.2 Add Associated Sites – If Request associated sites is deactivated

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**



Step 2: Now select the site & select **Add**



Step 3: The new site of yours that this supplier supplies is now linked.

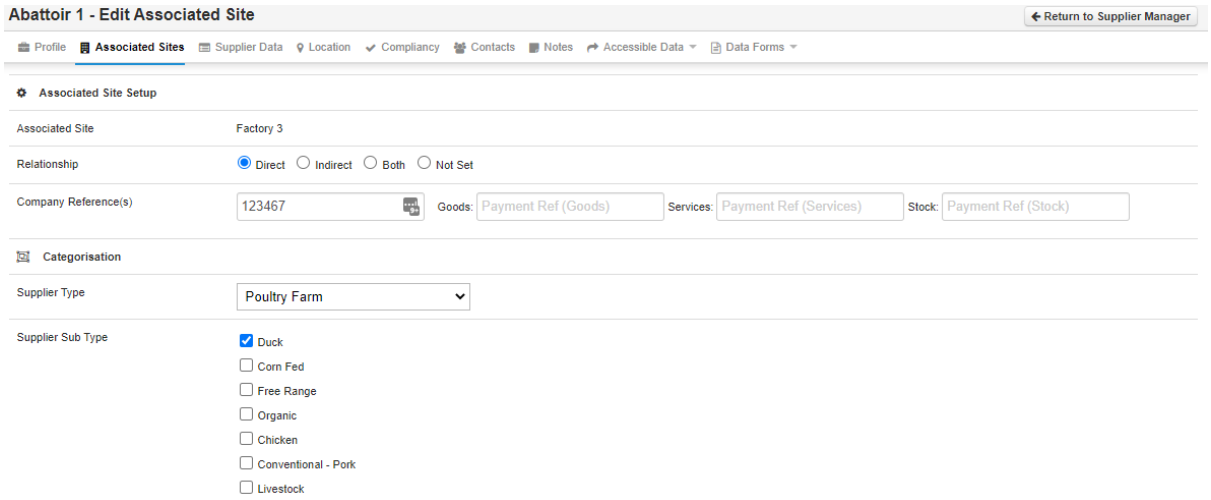
5.2.1.3 Update Associated Site - Amending/Updating Associated Sites info

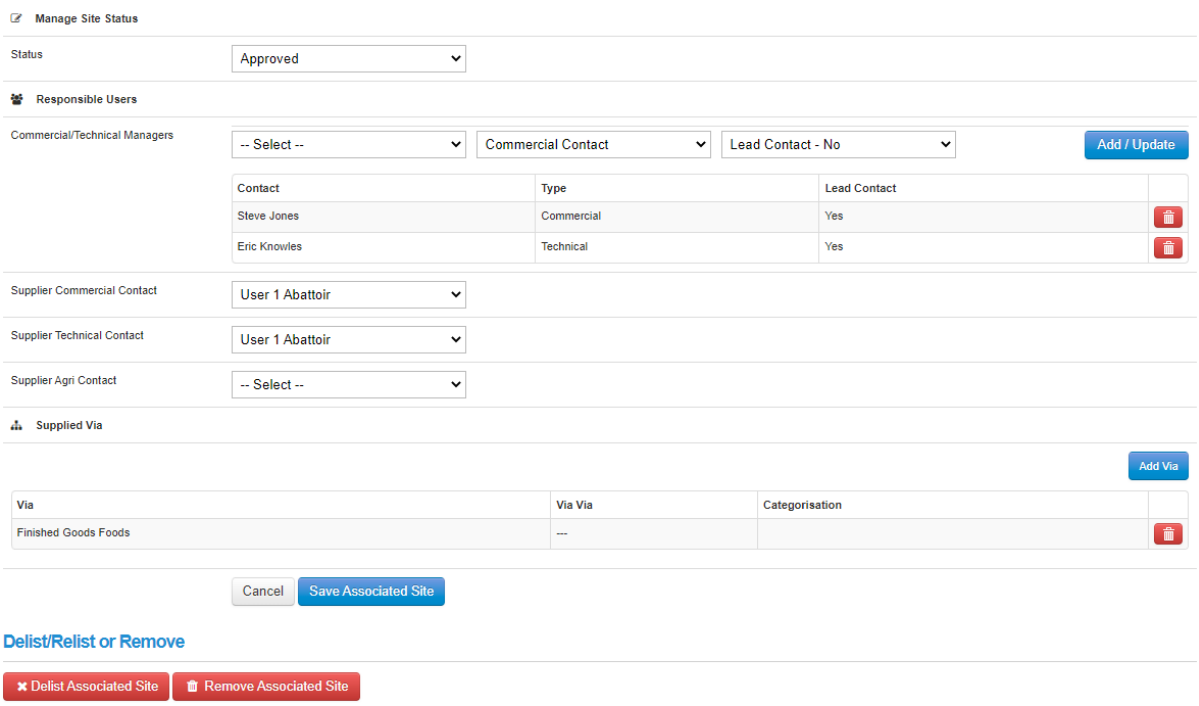
This is where you update details for the supplier for each site that that supplier supplies. You can amend the type, sub type etc here. And this is where you can request that a particular supplier supplies another site and setup that relationship.

Step 1: Select **Update Associated Site**

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

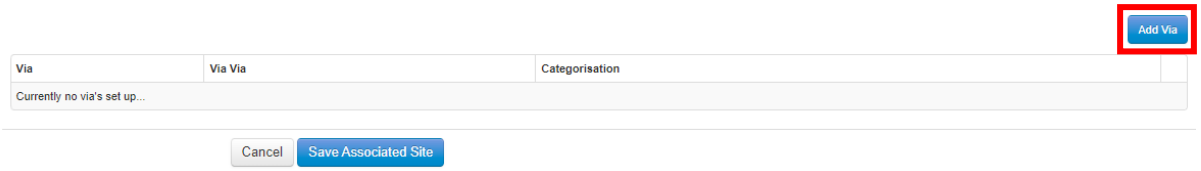




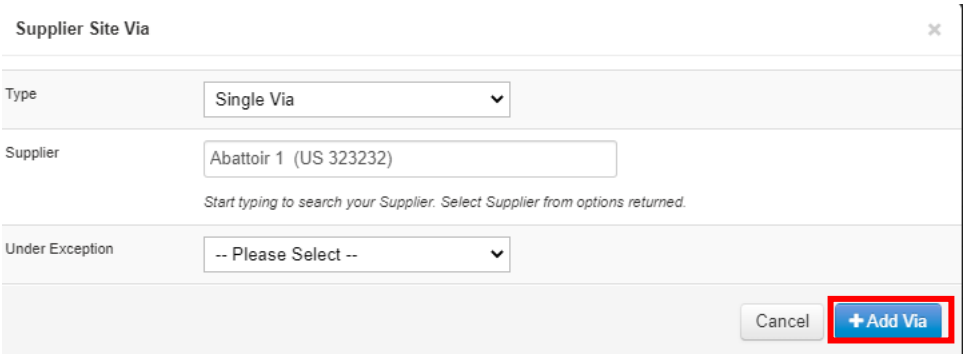
5.2.1.4 Supplied Via – What it is and setup

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**



Step 2: Select Supplier/Agent. Then select **Add Via** when done



Step 3: The relationship is now setup. You can add further Vias for this supplier if they are supplied via multiple agents.

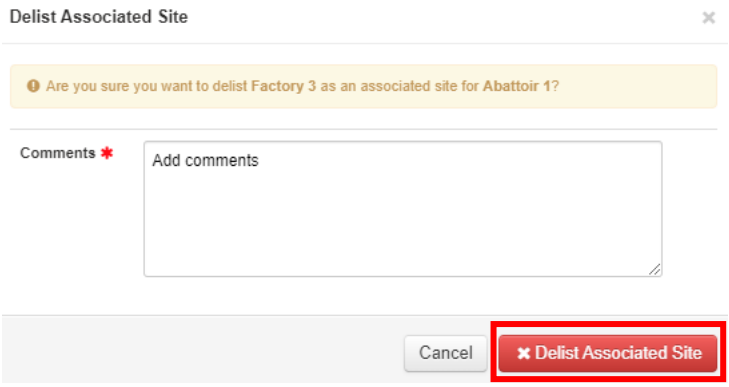
Step 4: To delete the via relationship select the red delete button.

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**

Step 2: Add a comment, then select **Delist Associated Site**

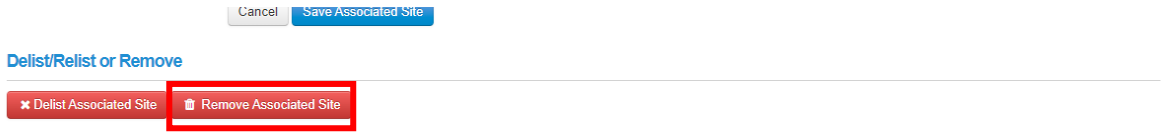


Step 3: The site is now delisted from that supplier**.** The supplier will show on that sites supplier list but as a status **Delisted**

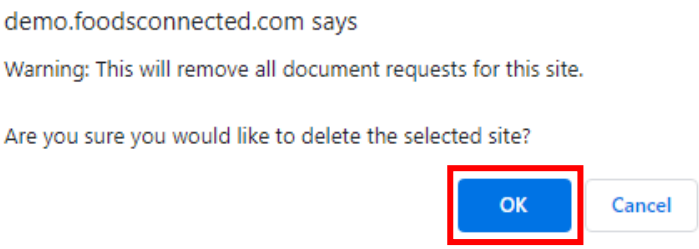
This is used to Remove the supplier for the particular site

5.2.1.6 Remove Associated Site – How to remove

Step 1: Select **Remove Associated Site**



Step 2: This validator box appears, select **OK**

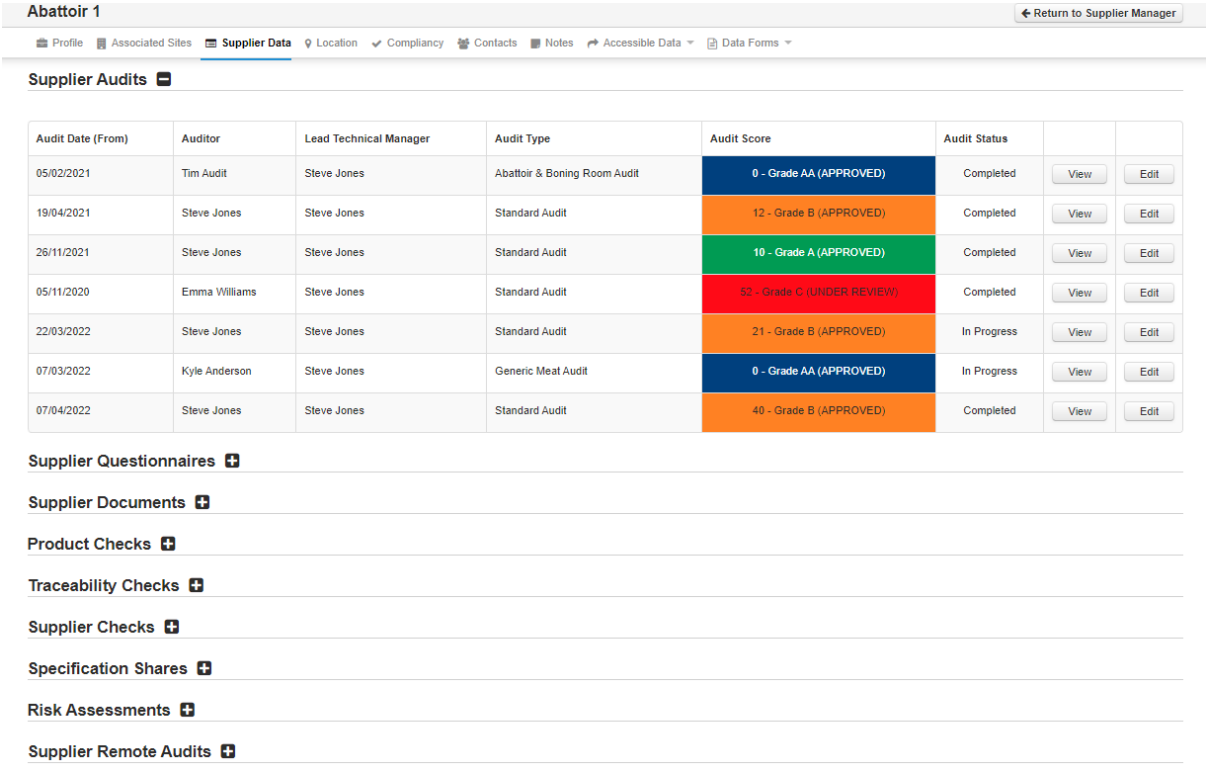


Step 3: Your site has now been removed from that supplier

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**



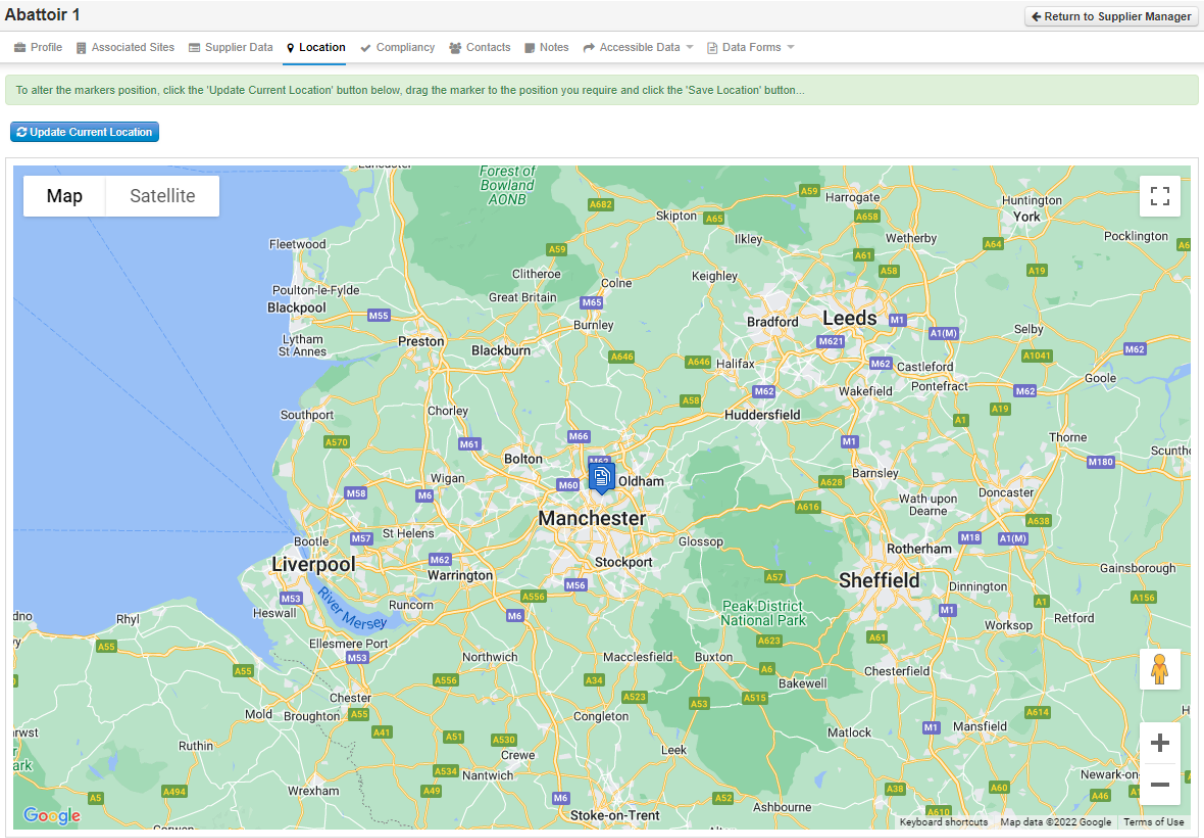
Audit Date (From)	Auditor	Lead Technical Manager	Audit Type	Audit Score	Audit Status		
05/02/2021	Tim Audit	Steve Jones	Abattoir & Boning Room Audit	0 - Grade AA (APPROVED)	Completed	View	Edit
19/04/2021	Steve Jones	Steve Jones	Standard Audit	12 - Grade B (APPROVED)	Completed	View	Edit
26/11/2021	Steve 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

Step 2: Select the tool then select view if you want to deep dive on a record.

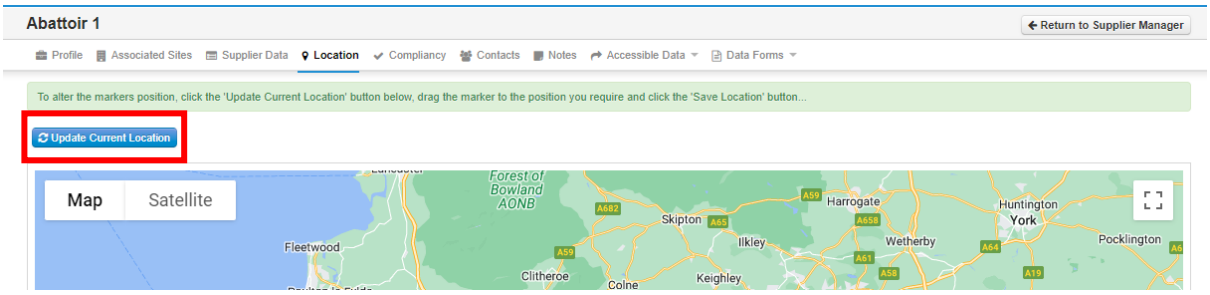
5.4 LOCATION – SET LOCATION OF THE SUPPLIER ON A MAP.

This is where you can set the location of your suppliers on a map.

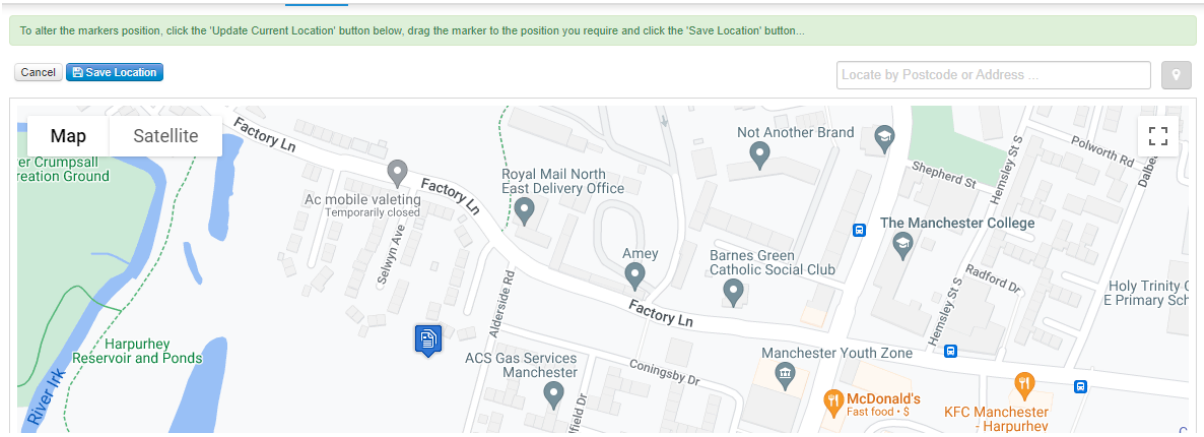
Step 1: Select **Supplier Manager** > Select **View** beside supplier > Select **Location**



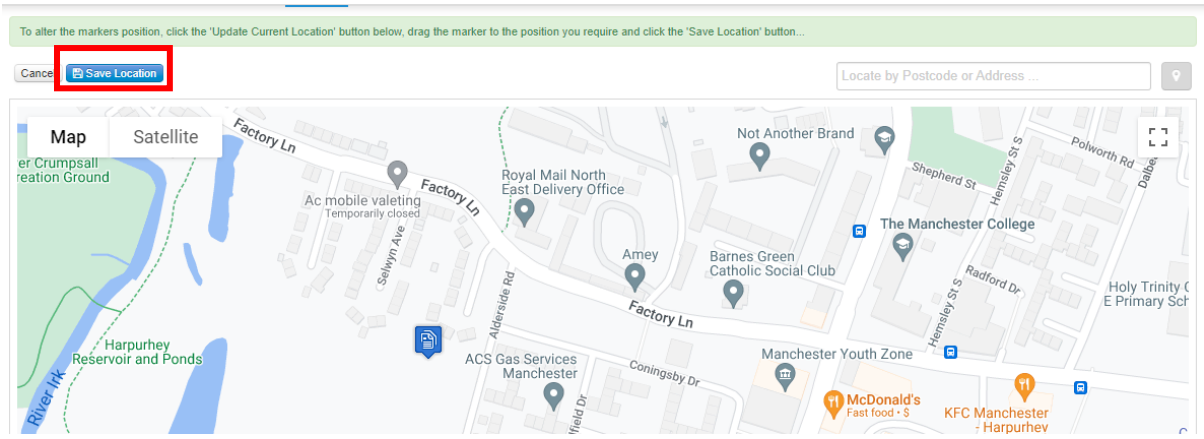
Step 2: To set, select **Update Current Location**



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**

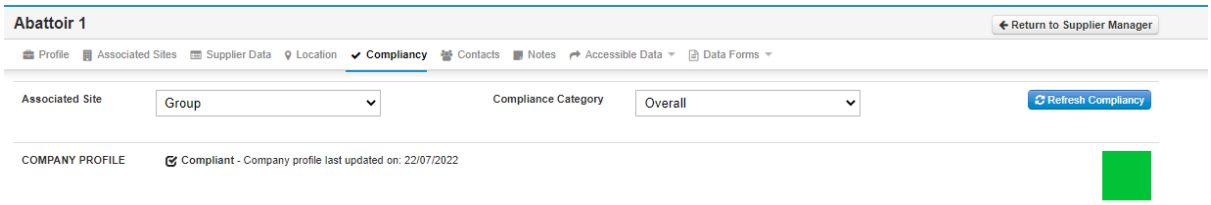


Step 5: To amend location, follow the steps above.

5.5 COMPLIANCY – WHAT THIS IS

This is where you can see the compliancy 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 **Compliancy**

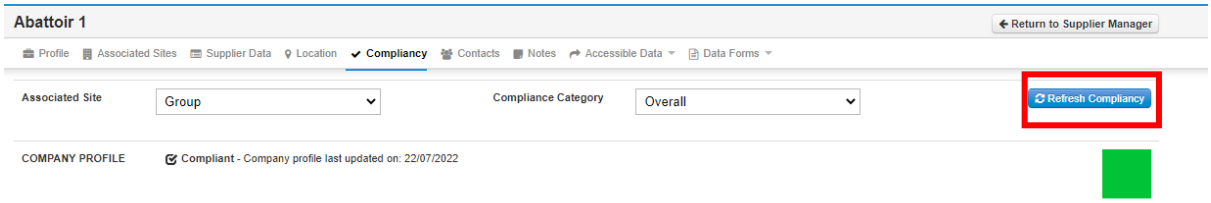


Step 2: Select the site & category to see their compliance

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 Compliancy**

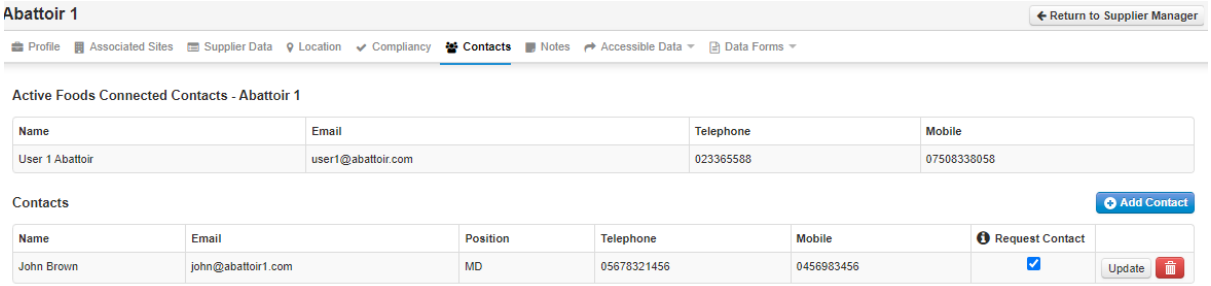


Step 2: Suppliers **Compliance** now updates

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.

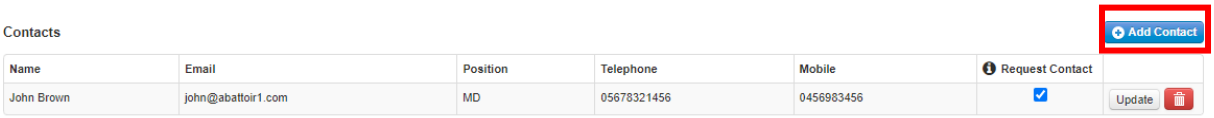
Step 1: Select **Supplier Manager** > Select **View** beside supplier > Select **Contacts**



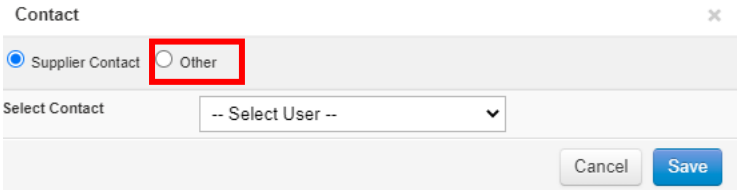
5.6.1 ADD NEW SUPPLIER CONTACT

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.

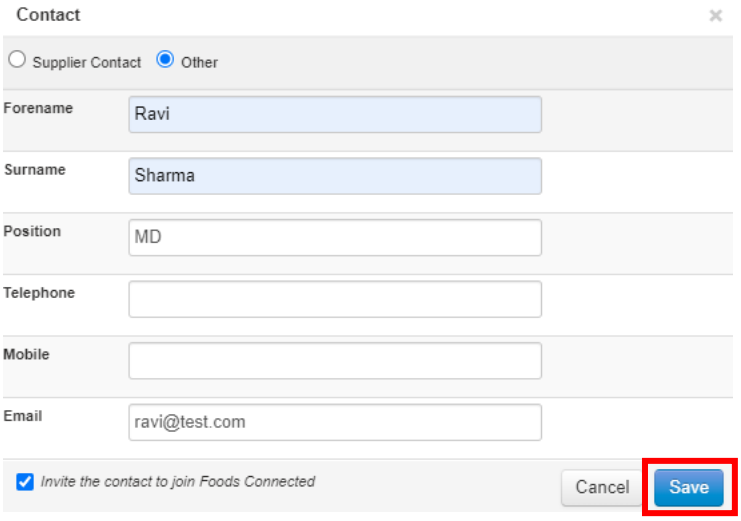
Step 1: Select **Add Contact**



Step 2: Select **Other**



Step 3: Fill in the details & make sure ***Invite the contact to join Foods Connected*** is ticked. When done select **Save**

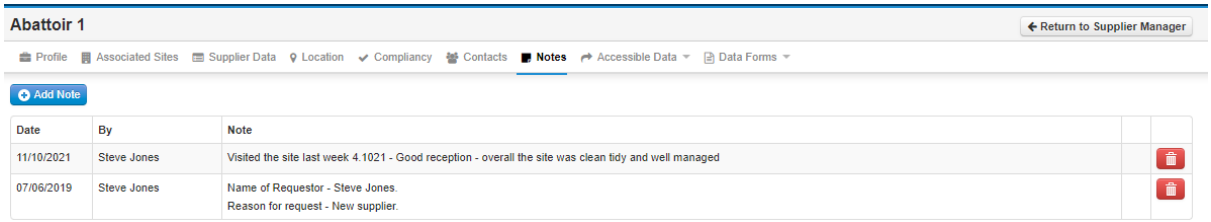


Step 4: This user will now get an invite email stating that you requested them to join Foods Connected. Once they login and activate their contact will sit in the active tab

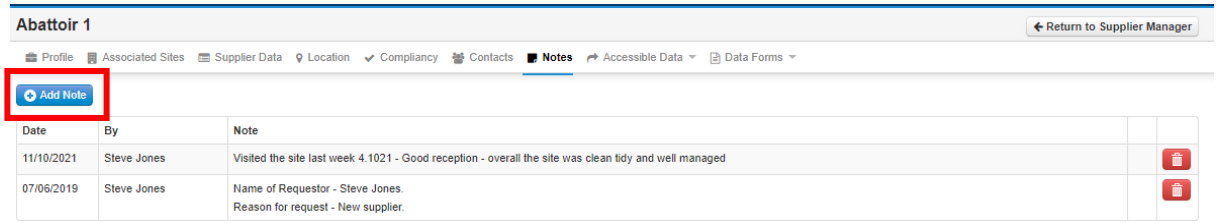
5.7 NOTES

This is where you can create notes on your supplier

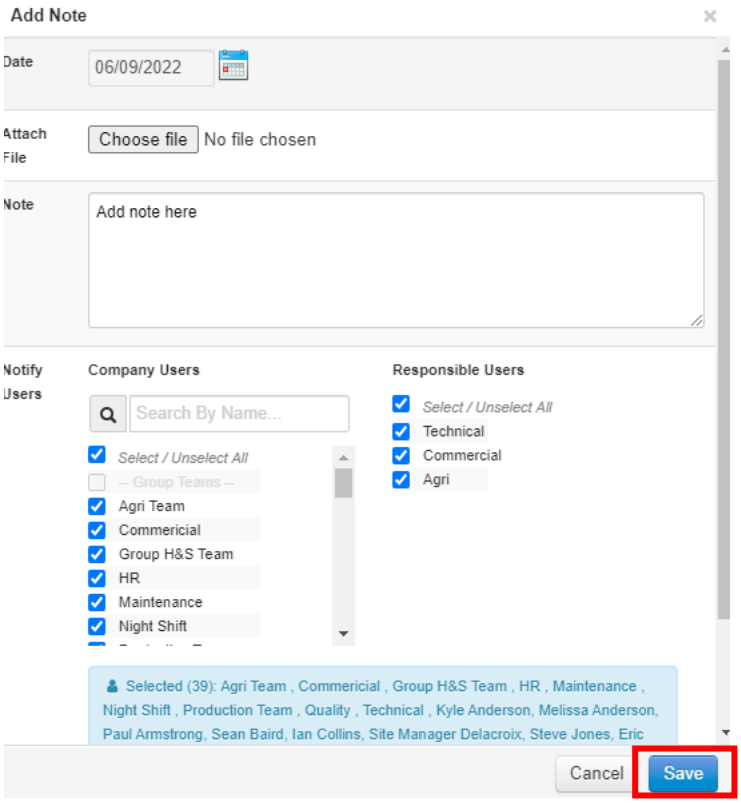
Step 1: Select **Supplier Manager** > Select **View** beside supplier > Select **Notes**



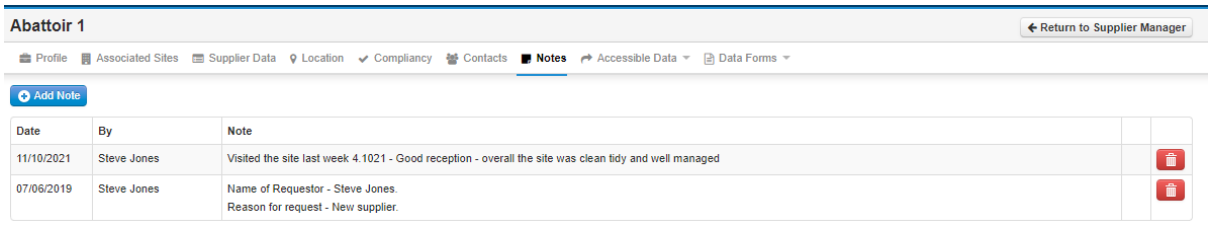
Step 2: Select **Add Note**



Step 3: Add the details to your note and users. Select **Save** when done



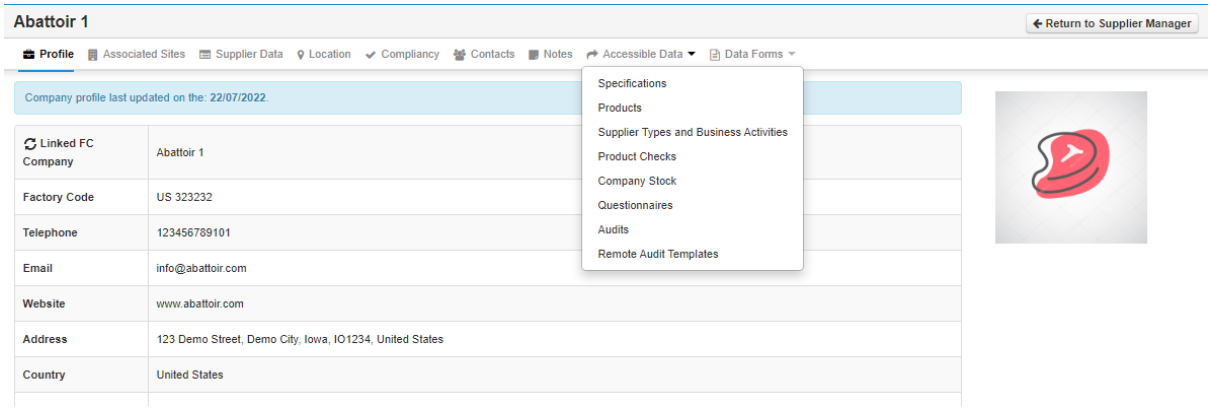
Step 4: Your notes are now saved and will look like this below



5.8 ACCESSIBLE DATA – WHAT THIS IS & HOW TO USE IT.

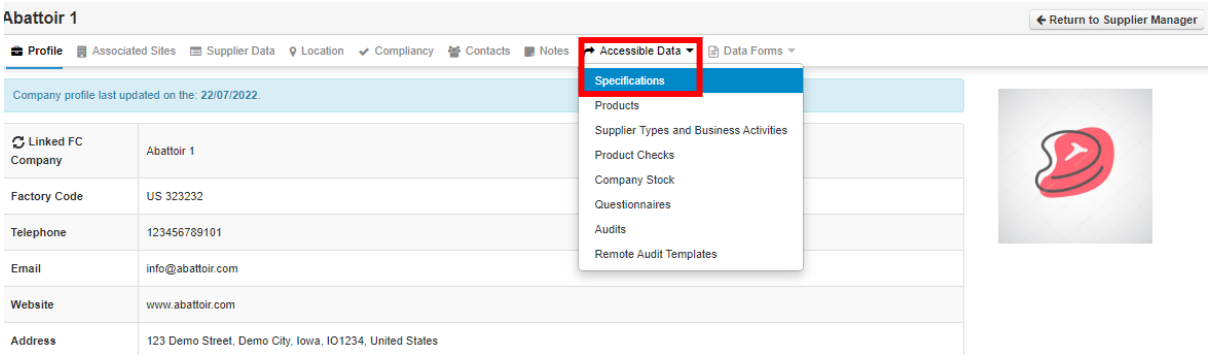
Accessible data tab is where you grant access to your suppliers to use your templates, products etc to complete in your format. For instance, you share your External Specification Template & products with your supplier for them to build a spec.

Step 1: Select **Supplier Manager** > Select **View** beside supplier > Select **Accessible Data**

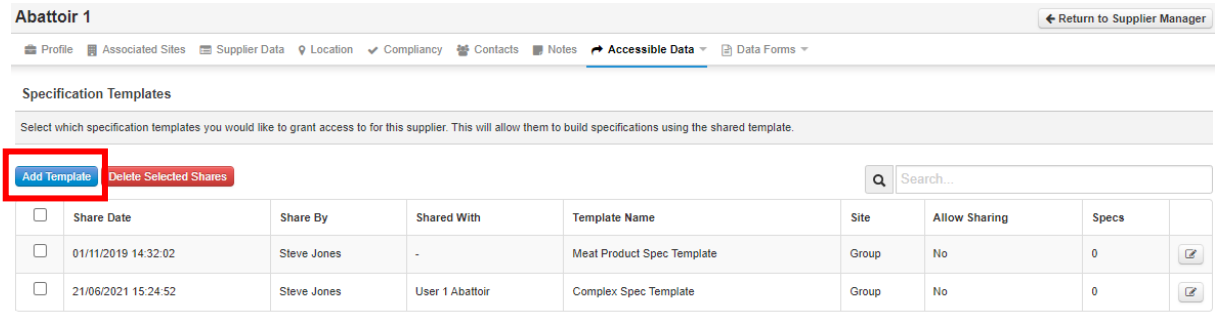


5.8.1 SPECIFICATIONS – HOW TO SHARE SPEC TEMPLATES WITH YOUR SUPPLIER

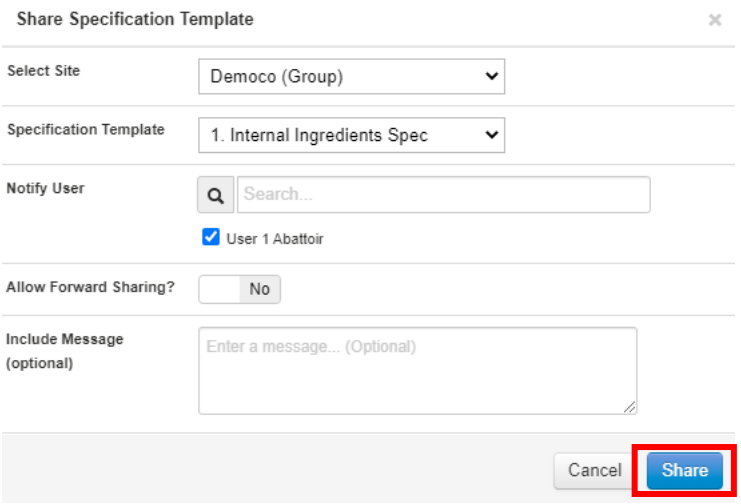
Step 1: Select **Accessible Data** then **Specifications**



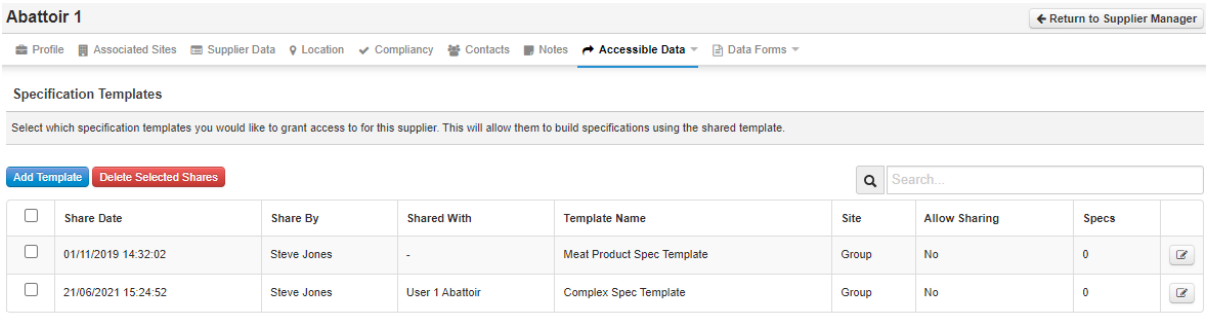
Step 2: Select **Add Template**



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**

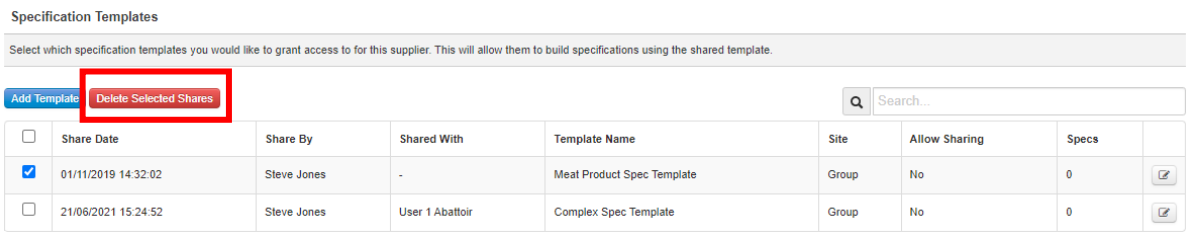


Step 4: Your shared templates will look like this below



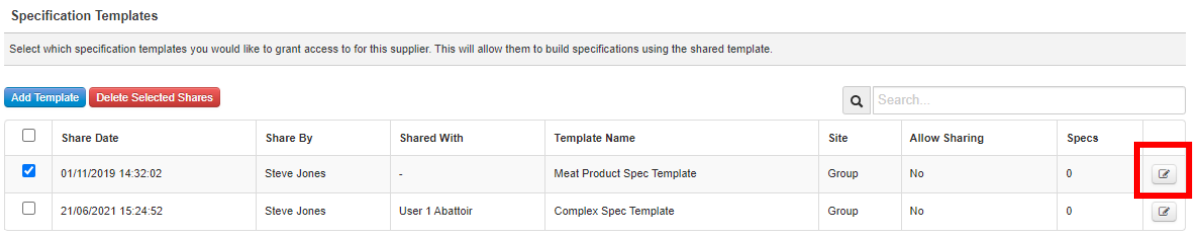
5.8.1.1 Delete Shared Specification Template

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.**

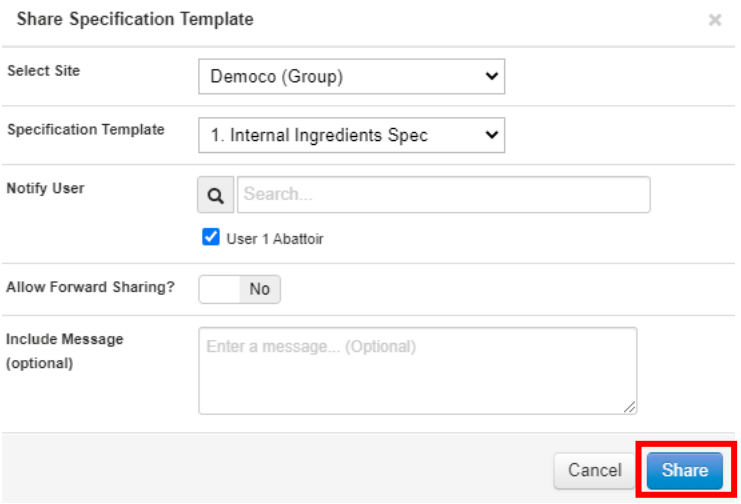


5.8.1.2 Edit Shared Specification Template

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.

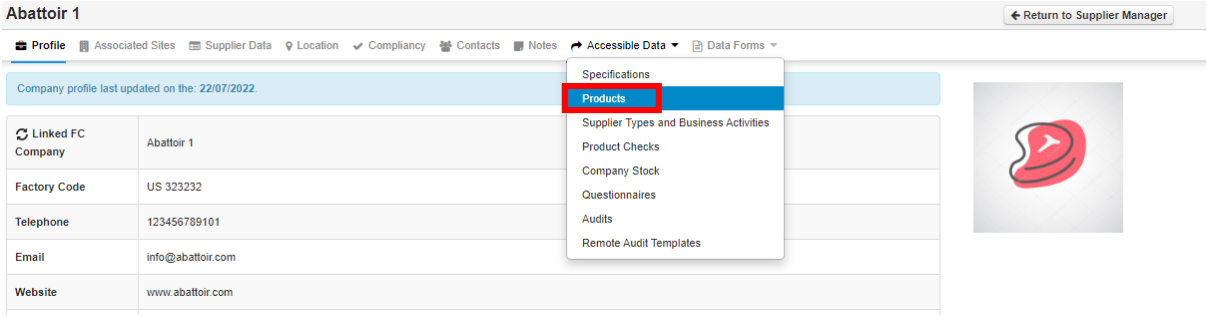


Step 2: Amend the details and select Share when done

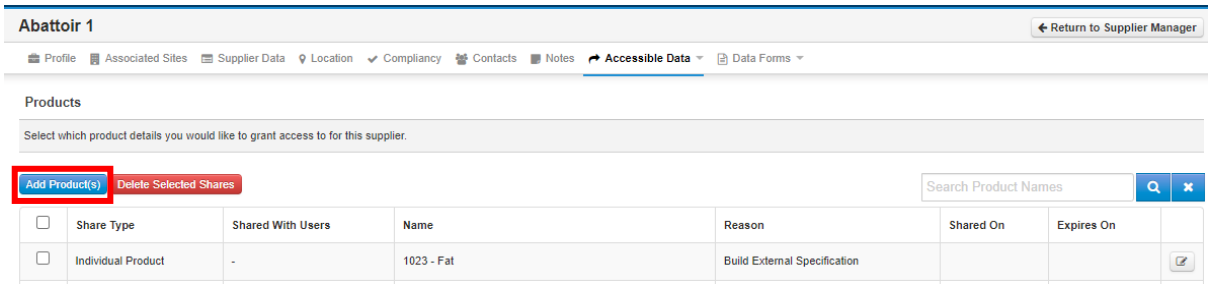


5.8.2 PRODUCTS – HOW TO SHARE

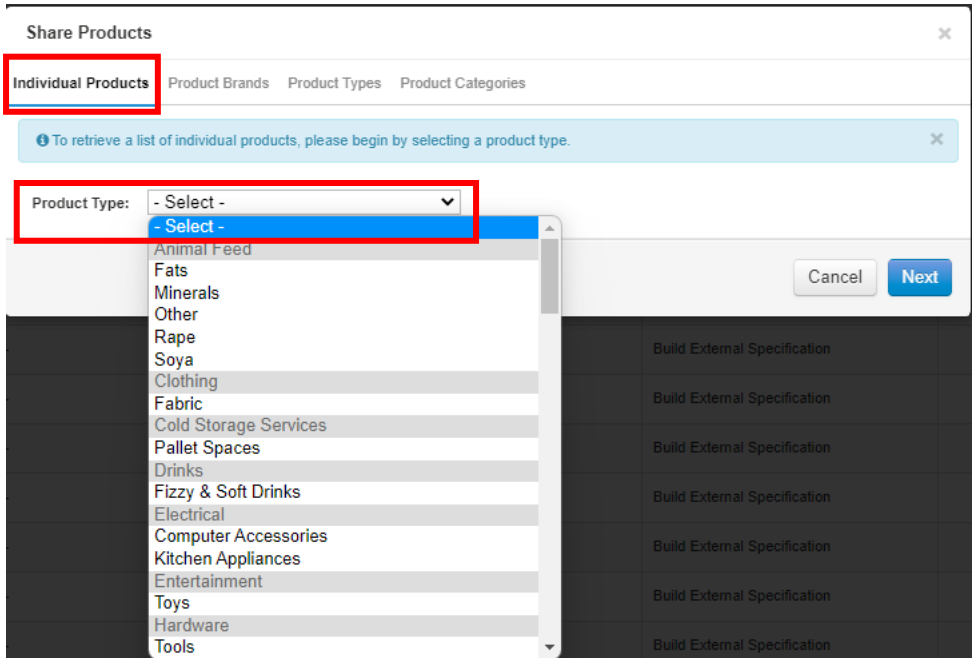
Step 1: Select **Accessible Data** then **Products**



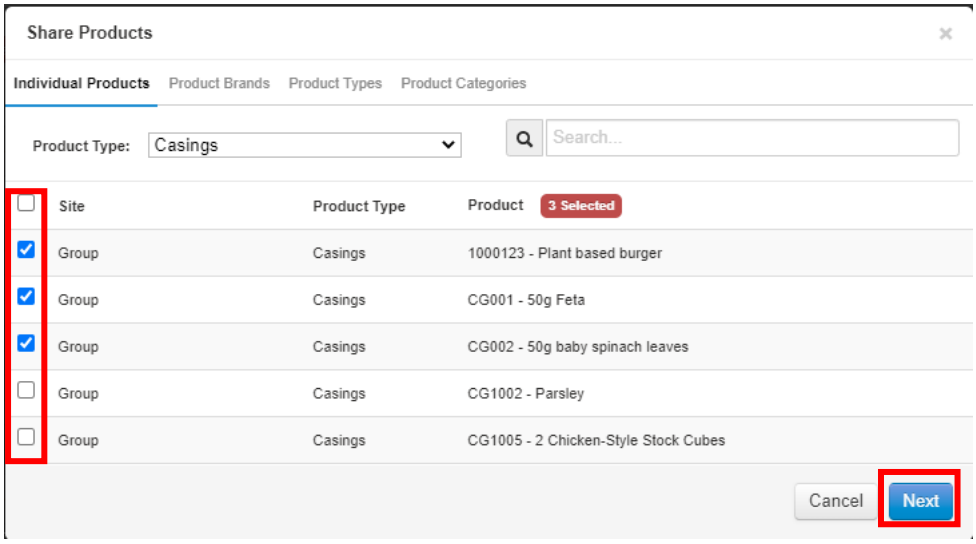
Step 2: Select **Add Products**



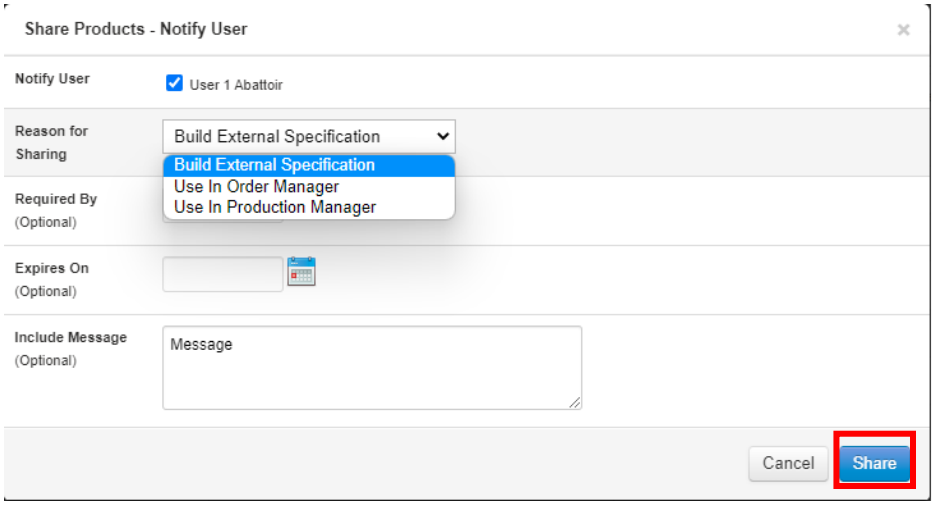
Step 3: Now select **individual products** to share on an individual product basis with your suppliers. (You can share by product brand, type & category as well but this would be bulk). Then on **Product Type** select the **Product Type**



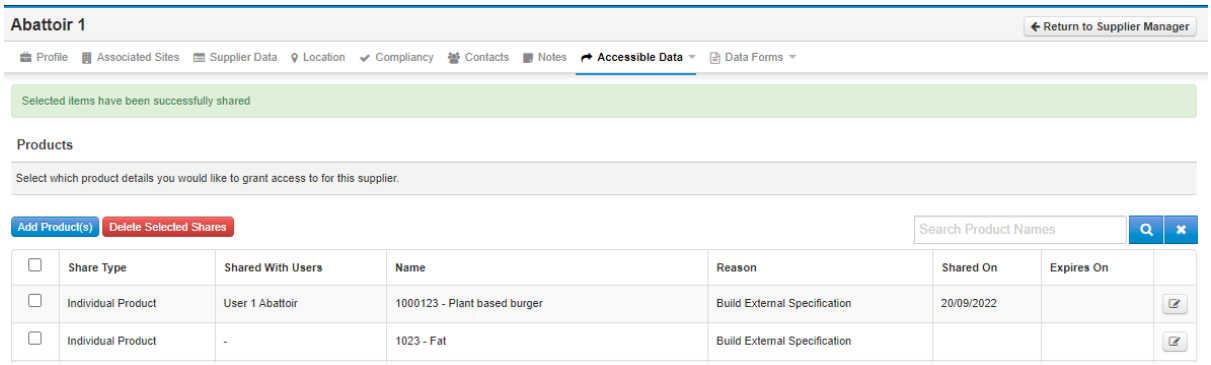
Step 4: Once you select a Type the products and codes will appear. Select your products you want to share with your supplier. Select **Next** when done



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.

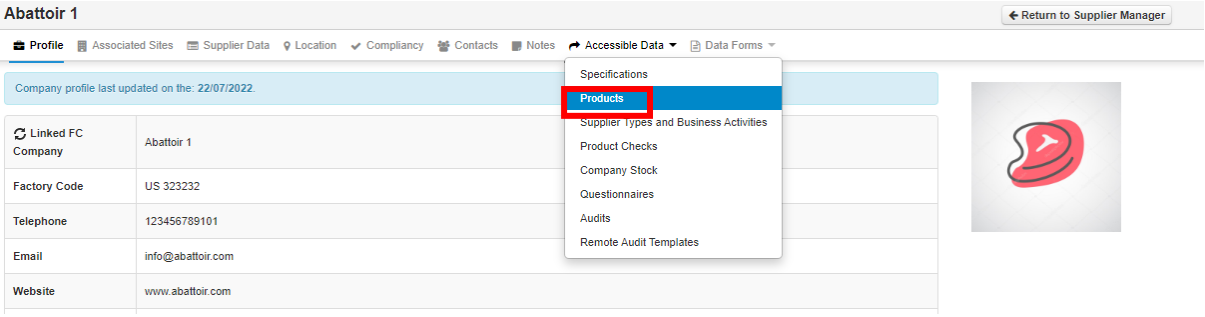


Step 6: Your shared products will look like this below.

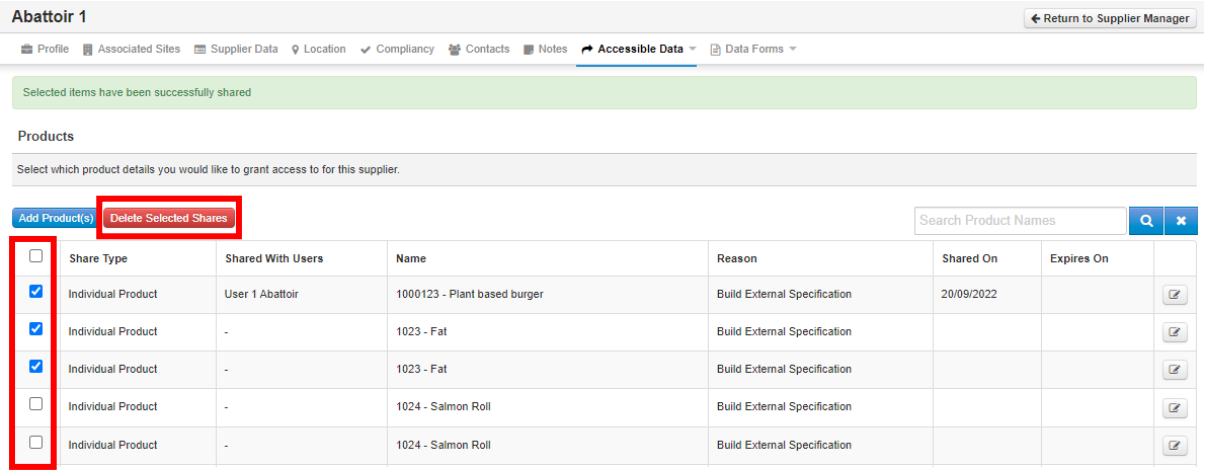


5.8.2.1 How to delete a shared product

Step 1: Navigate to your Accessible data tab for that supplier. Select **Products**



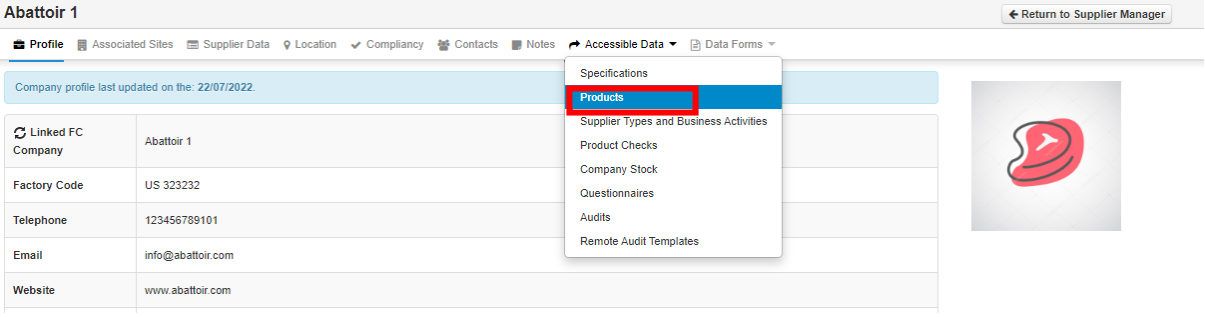
Step 2: Select product shares you want to delete. Then select Delete Selected Shares



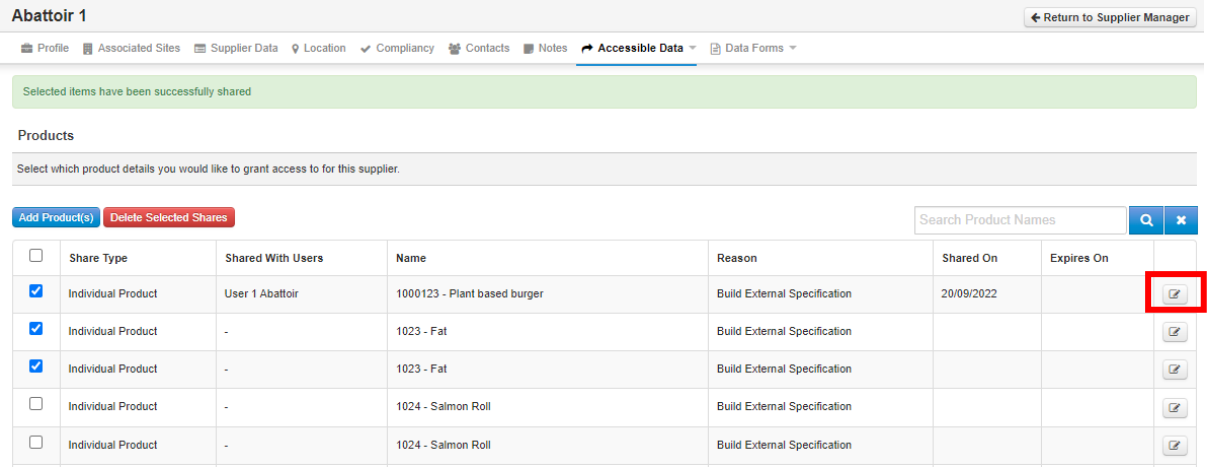
Step 3: The product shares are now deleted and will be deleted at the suppliers end.

5.8.2.2 How to edit a shared product share

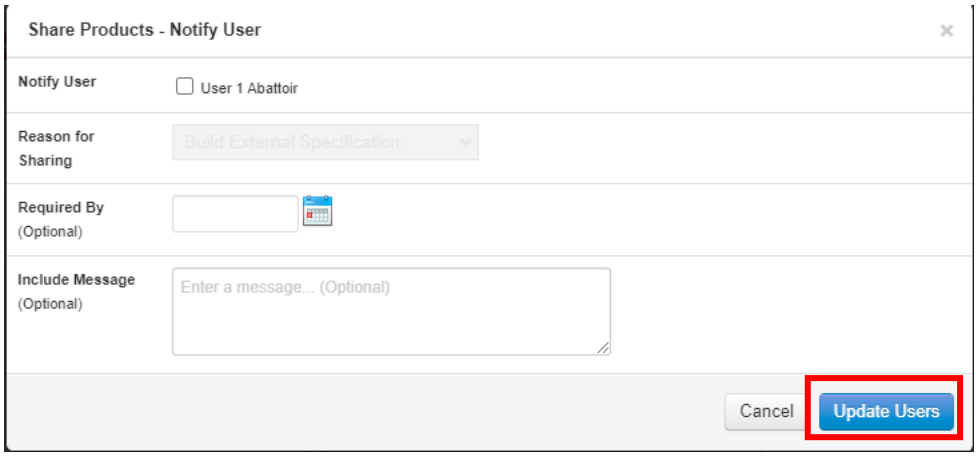
Step 1: Navigate to your Accessible data tab for that supplier. Select **Products**



Step 2: Select edit beside the products you want to edit.

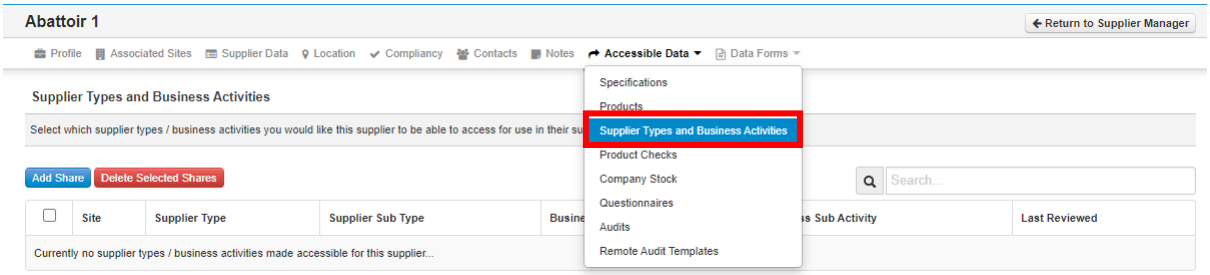


Step 3: Edit the share details. Select **Update Users** when done

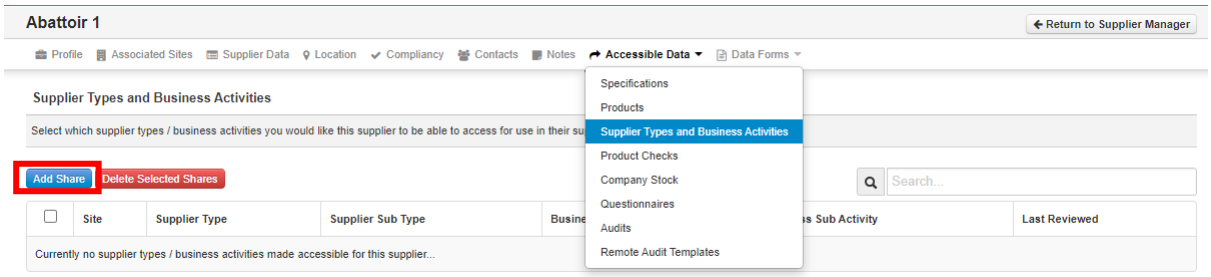


5.8.3 HOW TO SHARE SUPPLIER TYPES & BUSINESS ACTIVITIES

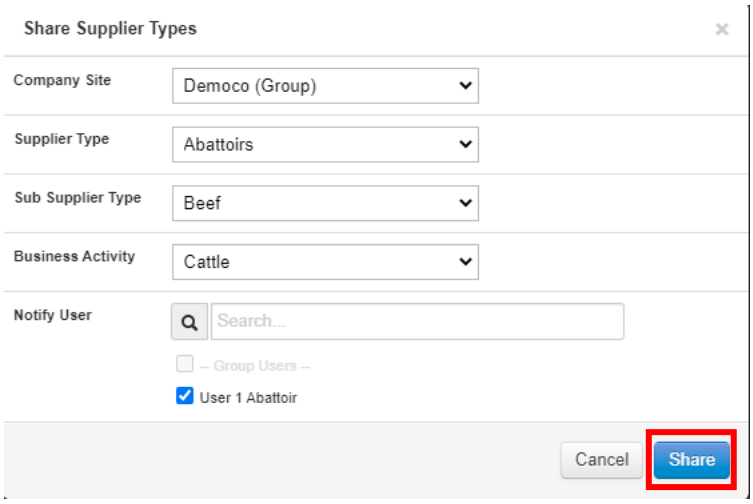
Step 1: Navigate to your **Accessible Data** tab for that supplier. Then select **Supplier Types & Business Activities**



Step 2: Select **Add Share**

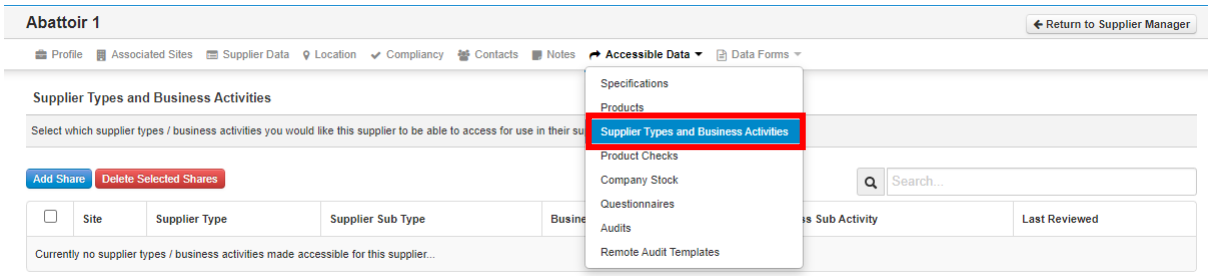


Step 3: Select details you want to share from the dropdowns etc. Select person to notify. When done select **Share**

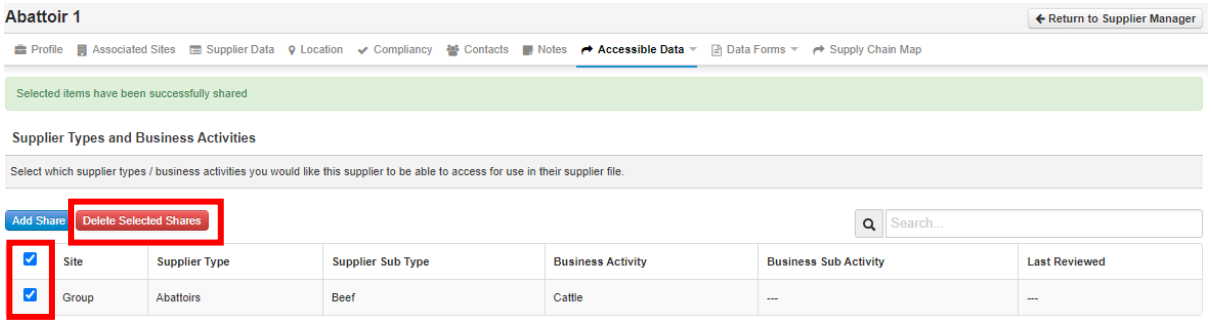


5.8.3.1 How to delete a shared Supplier Types & Business Activities

Step 1: Navigate to your **Accessible Data** tab for that supplier. Then select **Supplier Types & Business Activities**

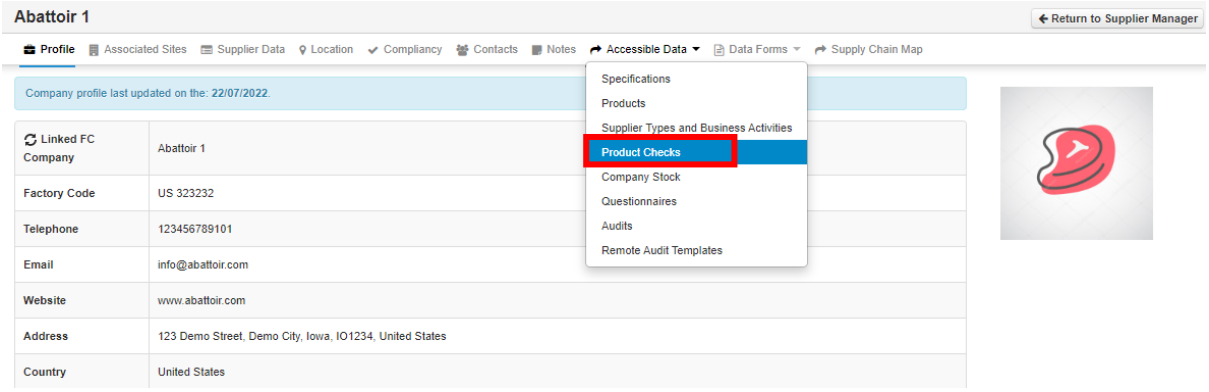


Step 2: Select Shares then select **Delete Selected Shares**

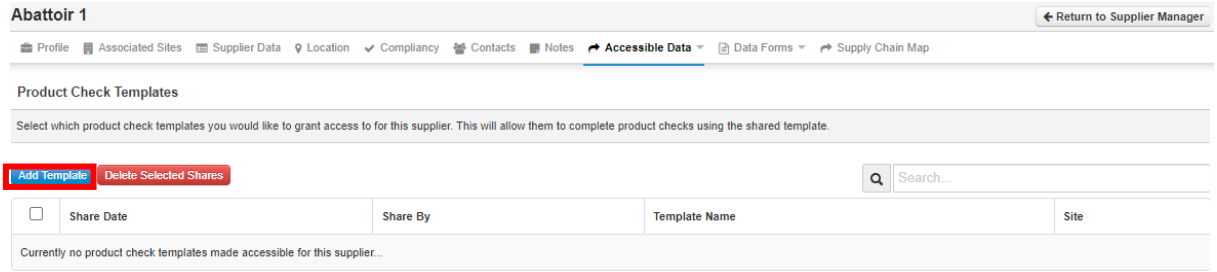


5.8.4 HOW TO SHARE PRODUCT CHECK TEMPLATES

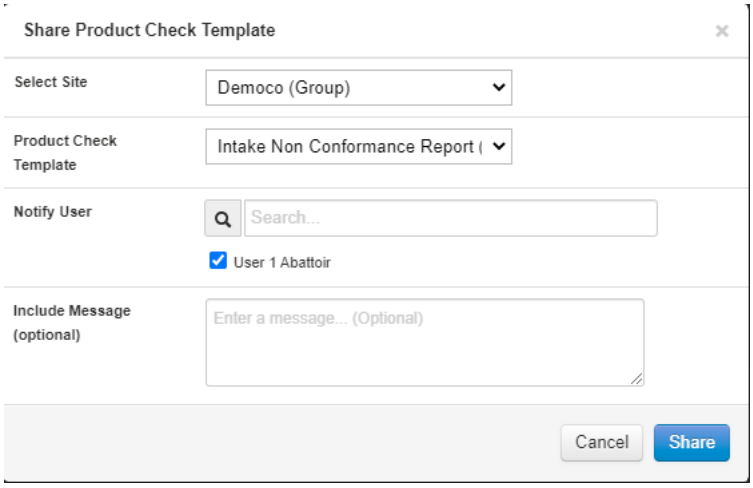
Step 1: Navigate to your **Accessible Data** tab for that supplier. Then select **Product Checks**



Step 2: Now select **Add Template.**

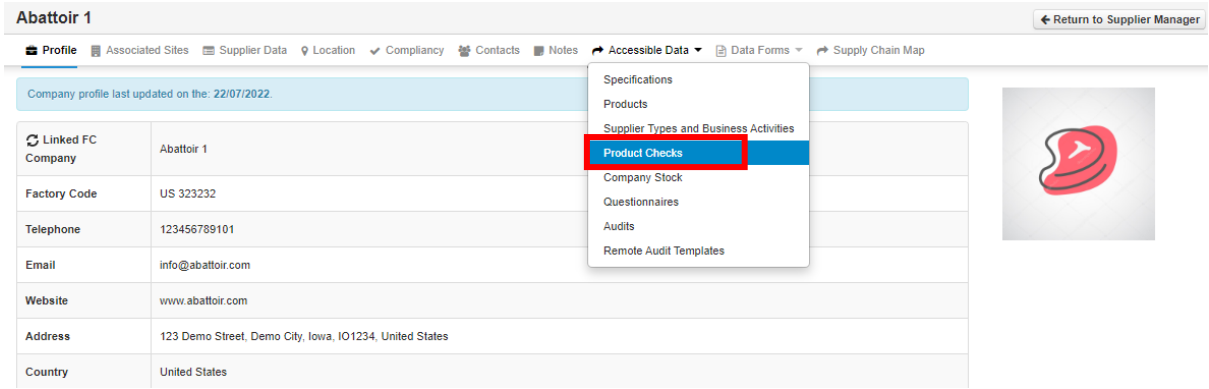


Step 3: Now select your details and the template you want to share. Select **Share** when done

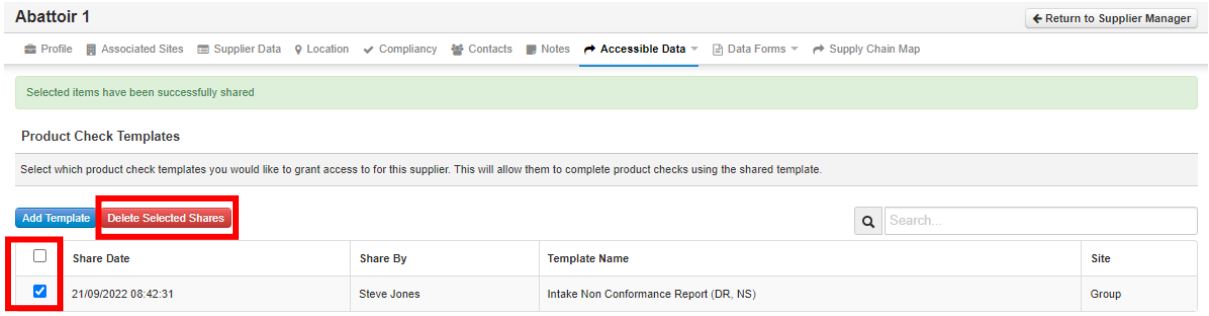


5.8.4.1 How to Delete Product Check Template Shares

Step 1: Navigate to your **Accessible Data** tab for that supplier. Then select **Product Checks**

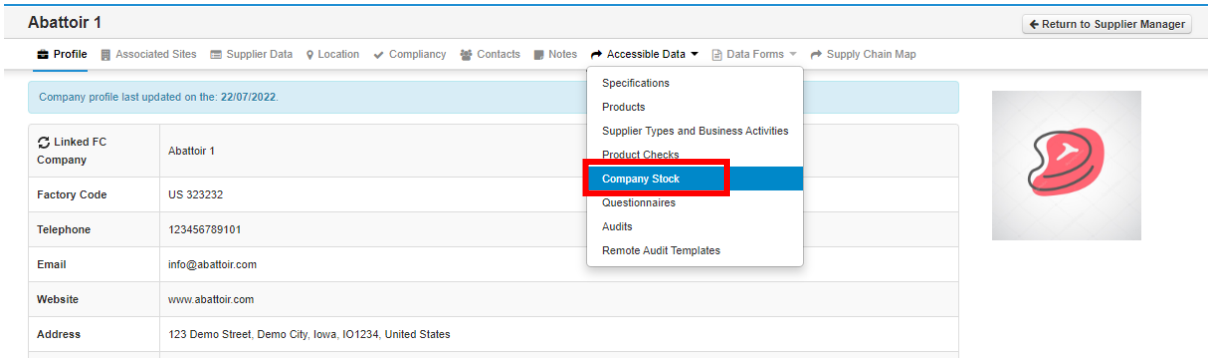


Step 2: Select the shares you want to delete, then select **Delete Selected Shares**

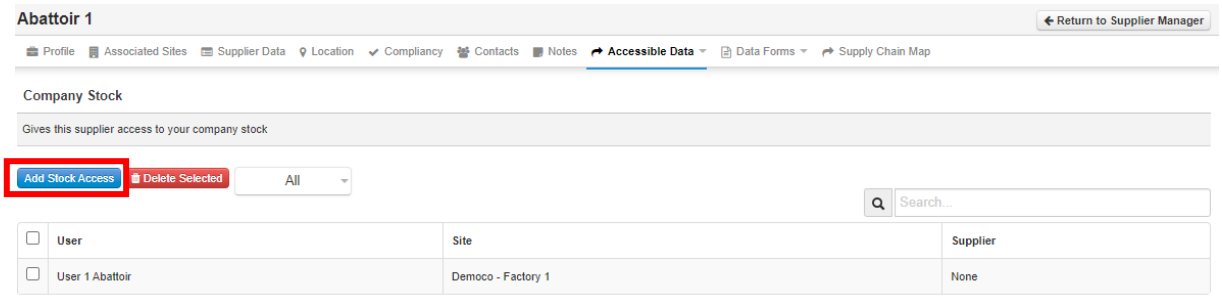


5.8.5 HOW TO SHARE COMPANY STOCK

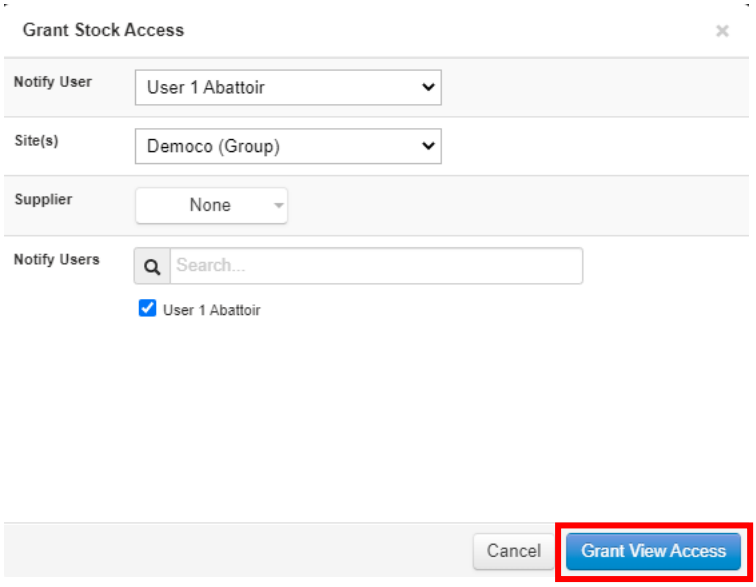
Step 1: Navigate to your **Accessible Data** tab for that supplier. Then select **Company Stock.**



Step 2: Now select **Add Stock Access**

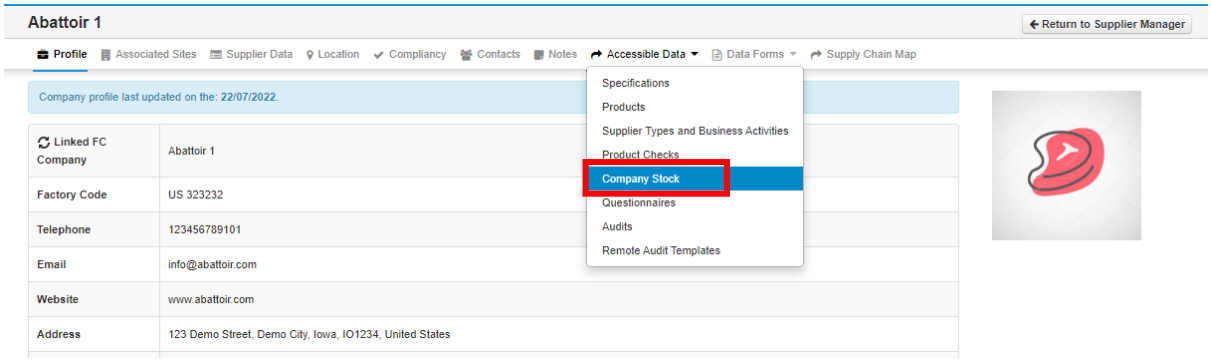


Step 3: Now select the details, select a user to notify. When done select **Grant View Access**

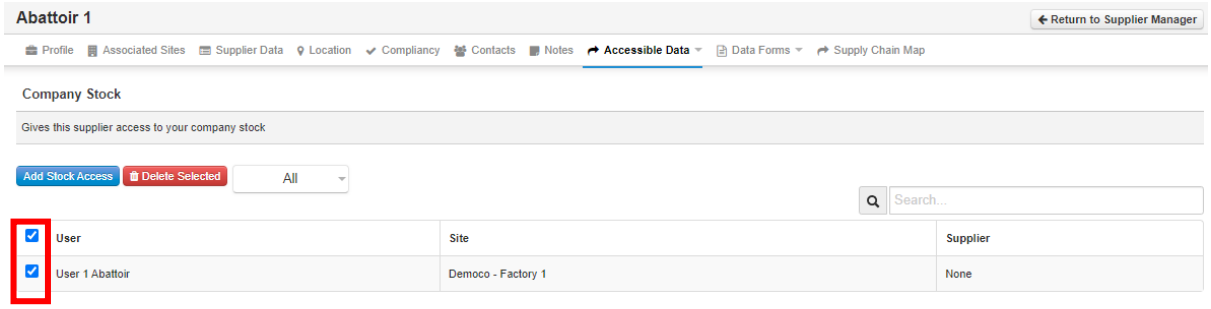


5.8.5.1 How to delete company stock shares

Step 1: Navigate to your **Accessible Data** tab for that supplier. Then select **Company Stock.**

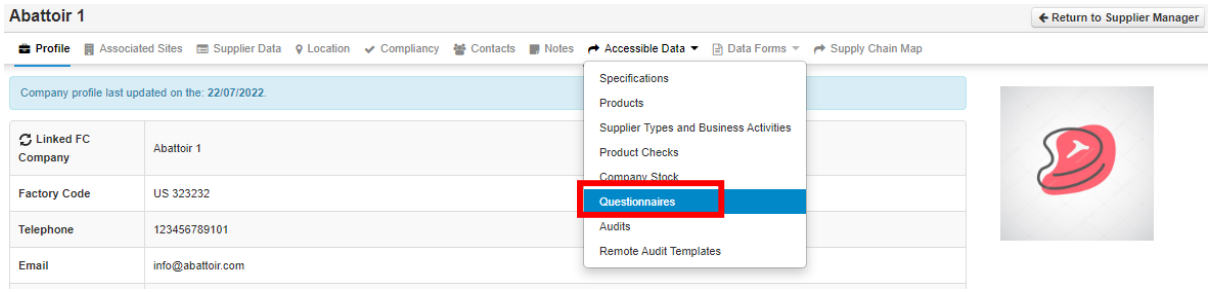


Step 2: Select **Stock Shares**, then select **Delete Selected**

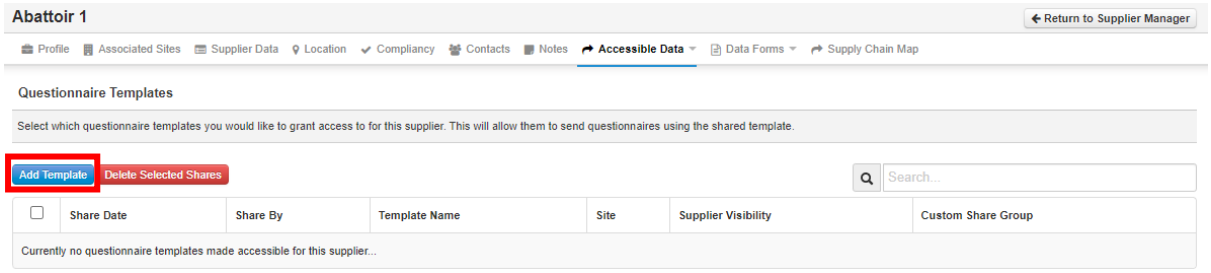


5.8.6 HOW TO SHARE QUESTIONNAIRES

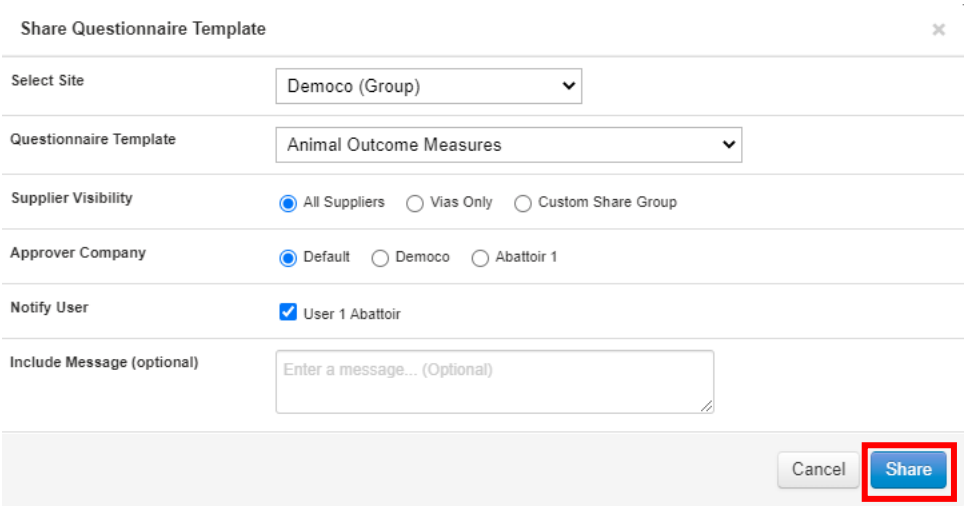
Step 1: Navigate to your **Accessible Data** tab for that supplier. Then select **Questionnaires**



Step 2: Now select **Add Template**

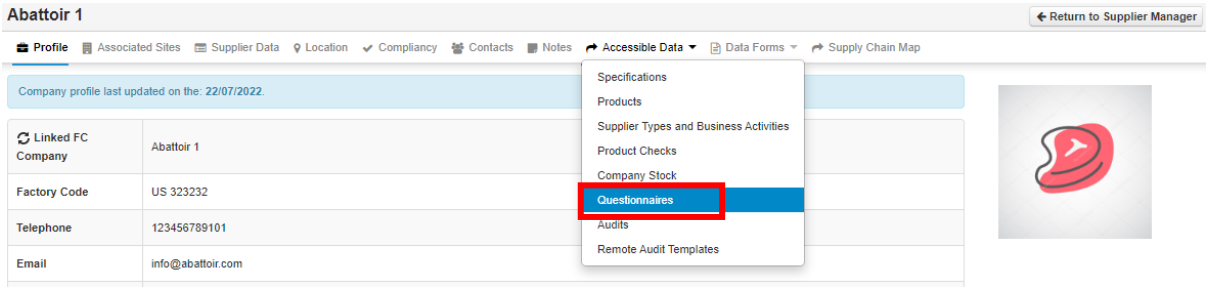


Step 3: Now select the template and the details of the share. Select **Share** when done

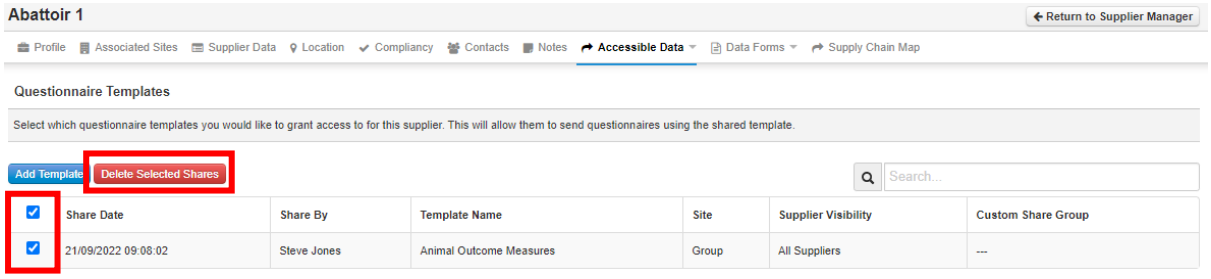


5.8.6.1 How to delete shared questionnaires

Step 1: Navigate to your **Accessible Data** tab for that supplier. Then select **Questionnaires**

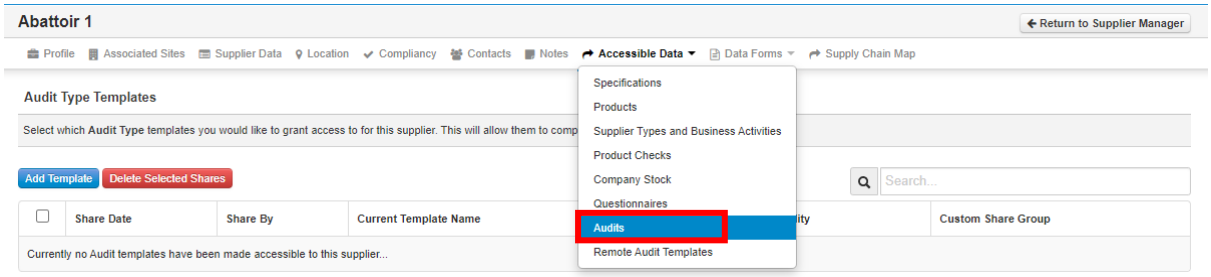


Step 2: Select shared Questionnaires. When done select **Delete Selected Shares**

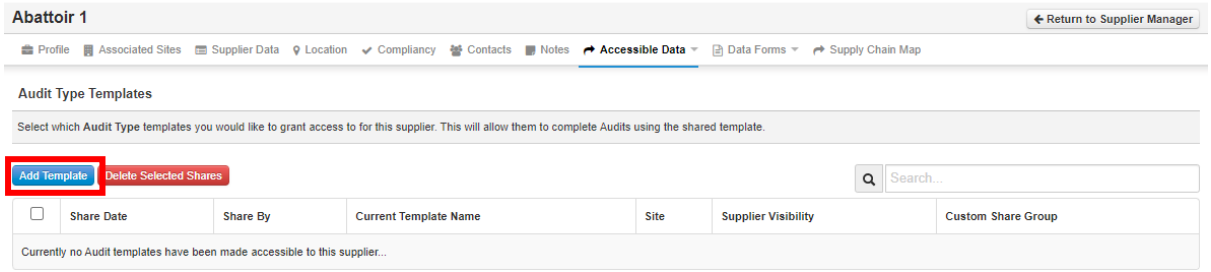


5.8.7 HOW TO SHARE AUDITS

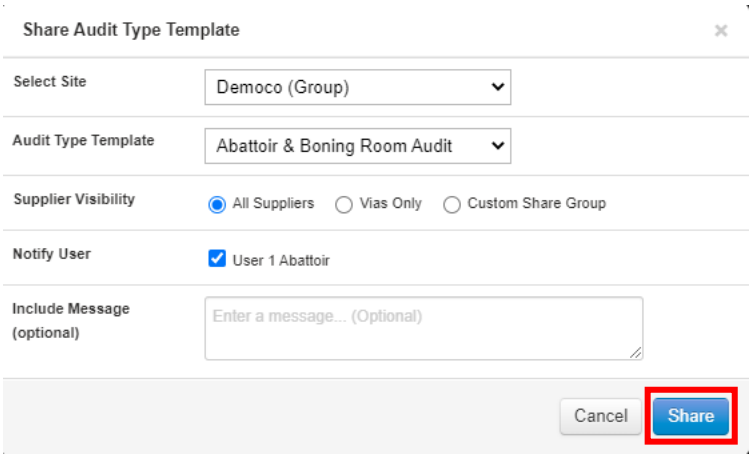
Step 1: Navigate to your **Accessible Data** tab for that supplier. Then select **Audits**



Step 2: Select **Add Template.**

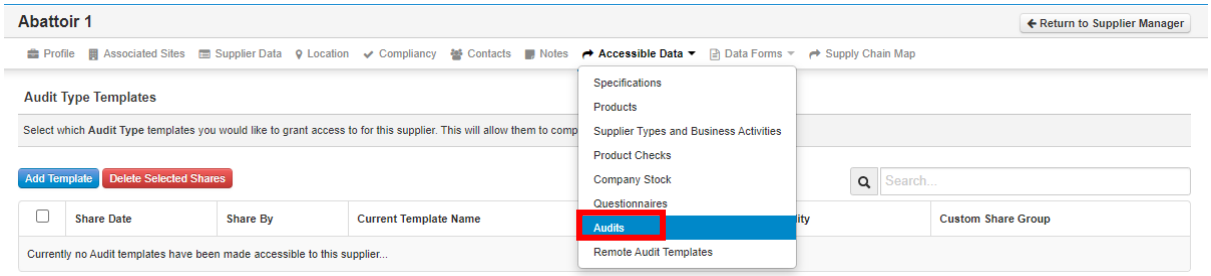


Step 3: Now select the template and the details of the share. Select **Share** when done

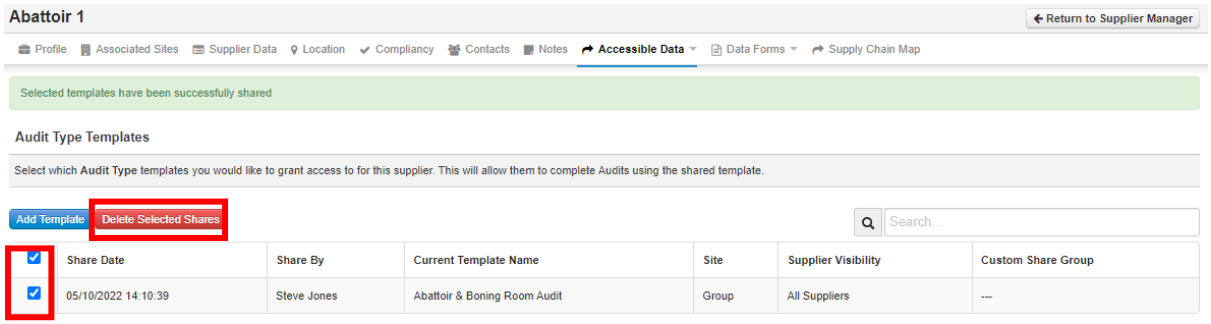


5.8.7.1 How to delete Audit shares

Step 1: Navigate to your **Accessible Data** tab for that supplier. Then select **Audits**

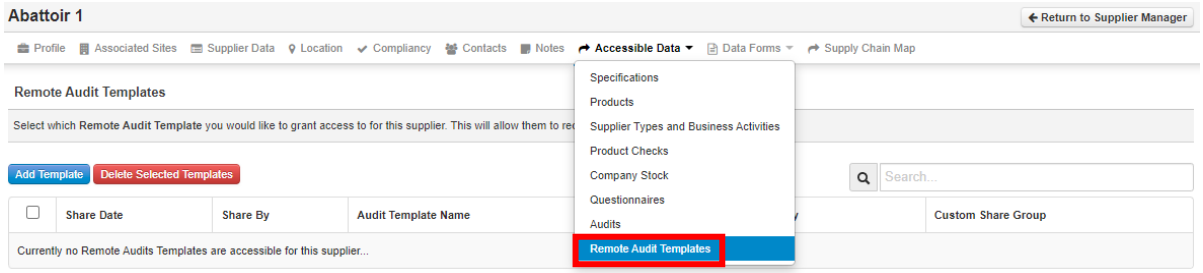


Step 2: Select the audit shared that you want to delete then select **Delete Selected Shares**

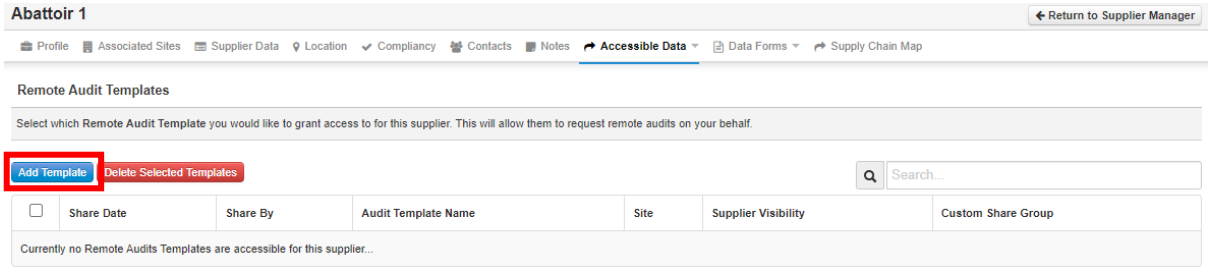


5.8.8 HOW TO SHARE REMOTE AUDIT TEMPLATES

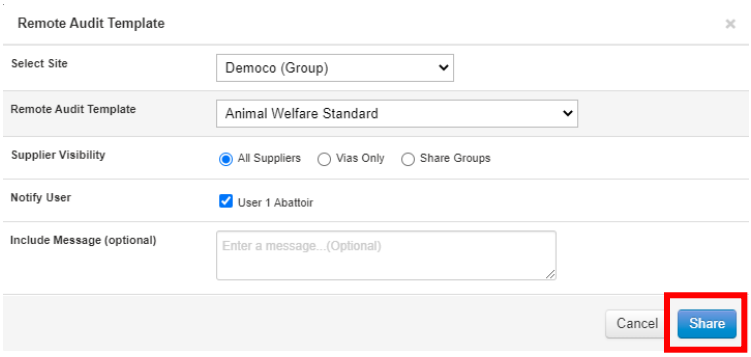
Step 1: Navigate to your **Accessible Data** tab for that supplier. Then select **Remote Audit Templates**



Step 2: Select **Add Template.**

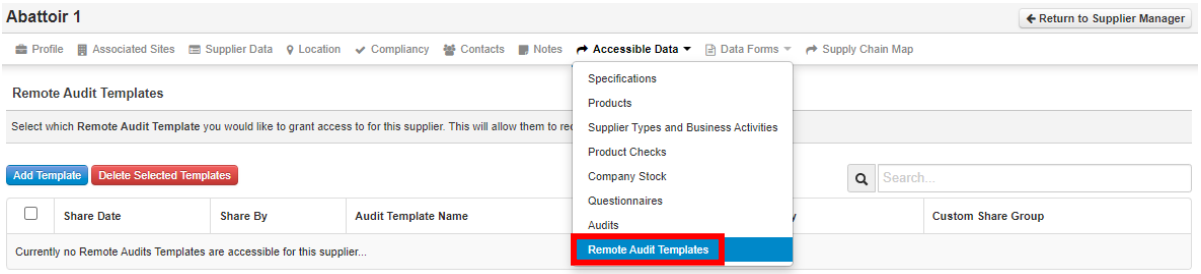


Step 3: Now select the template and the details of the share. Select **Share** when done

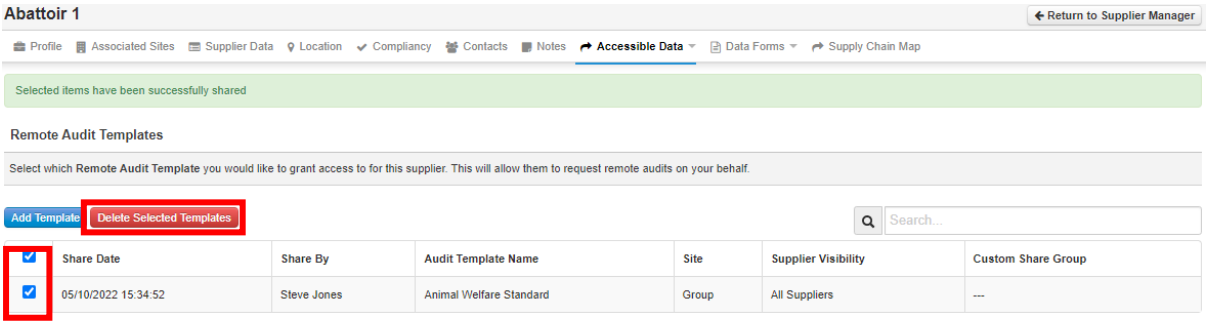


5.8.8.1 How to delete Remote Audit shares

Step 1: Navigate to your **Accessible Data** tab for that supplier. Then select **Remote Audit Templates**



Step 2: Select the audit shared that you want to delete then select **Delete Selected Templates**

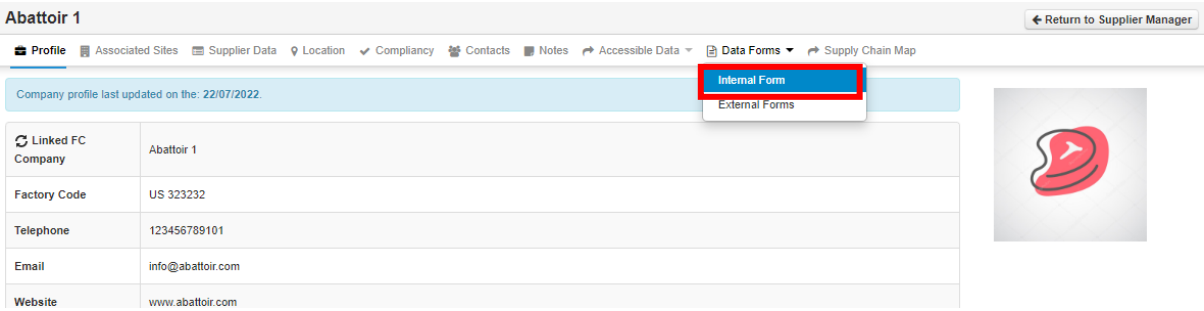


5.9 DATA FORMS – WHAT THIS IS & HOW TO USE IT

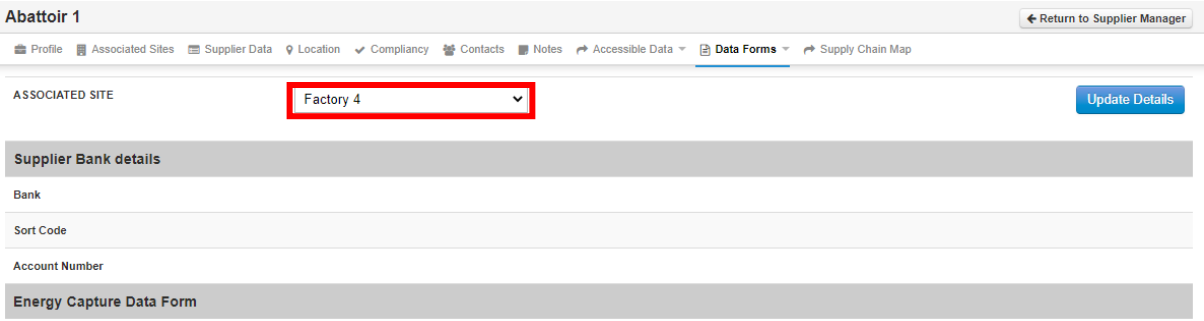
This is where you add content to your Internal data forms & request content from your supplier on External data forms. When complete this is where you view this data as well. Remember you created the forms in point 1.1.2.2.

5.9.1 HOW VIEW & POPULATE INTERNAL DATA FORMS

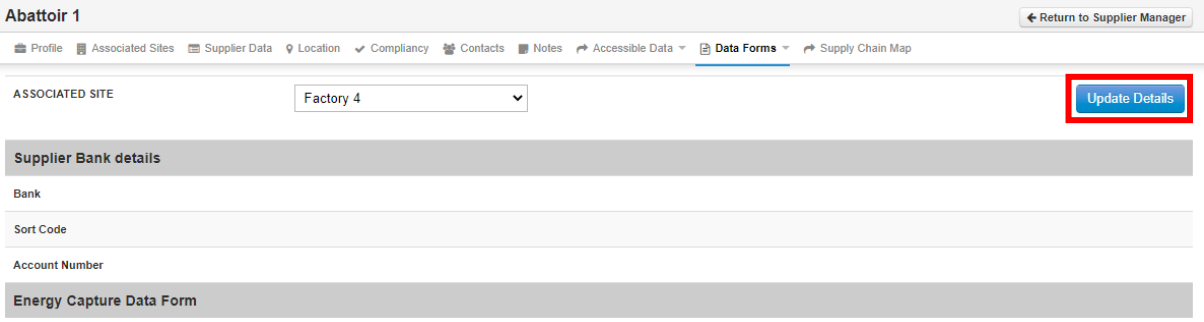
Step 1: Navigate to your **Data Forms** tab for that supplier. Then select **Internal Form**



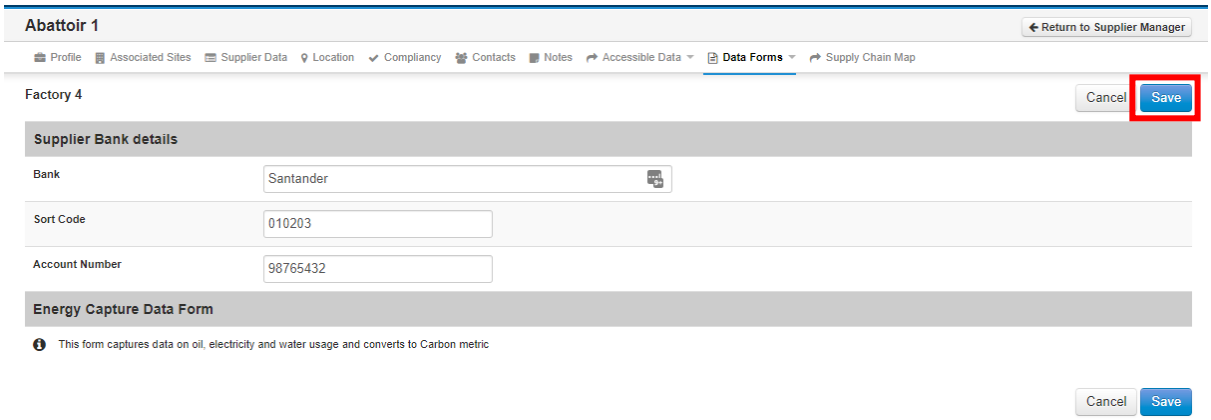
Step 2: Select the site that the suppliers form is active. The form will appear



Step 3: Now select **Update Details.**



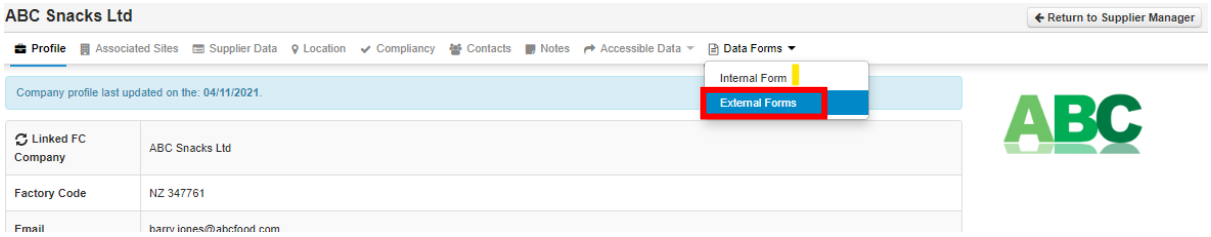
Step 4: Fill in your form & select **Save** when done



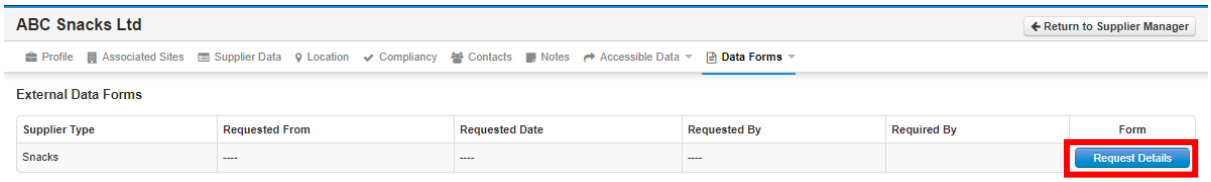
Step 5: You can now view your data form from here as well.

5.9.2 HOW VIEW & POPULATE EXTERNAL DATA FORMS

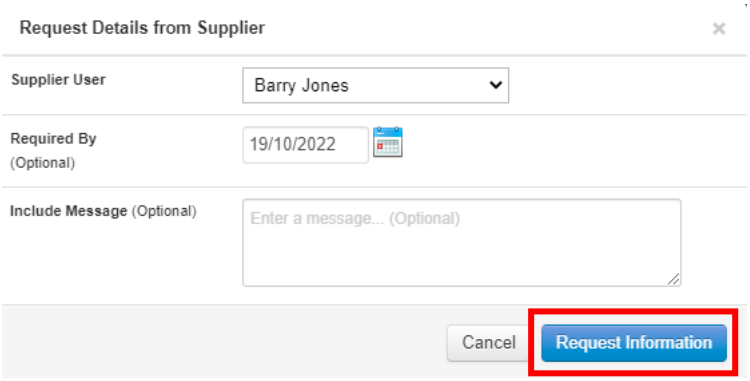
Step 1: Navigate to your **Data Forms** tab for that supplier. Then select **External Forms**



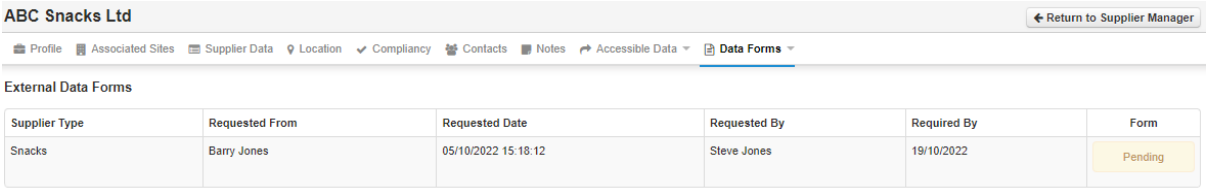
Step 2: Now select **Request Details**



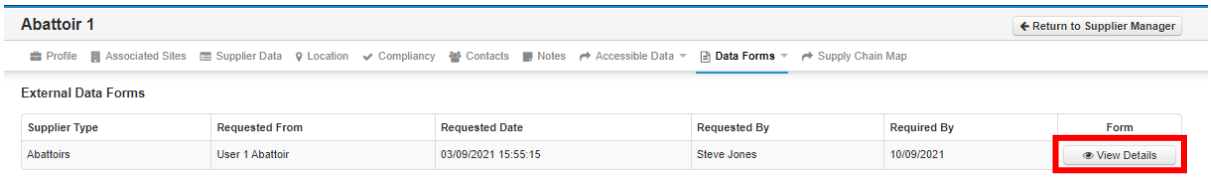
Step 3: Now select the details of the request & select **Request Information** when done



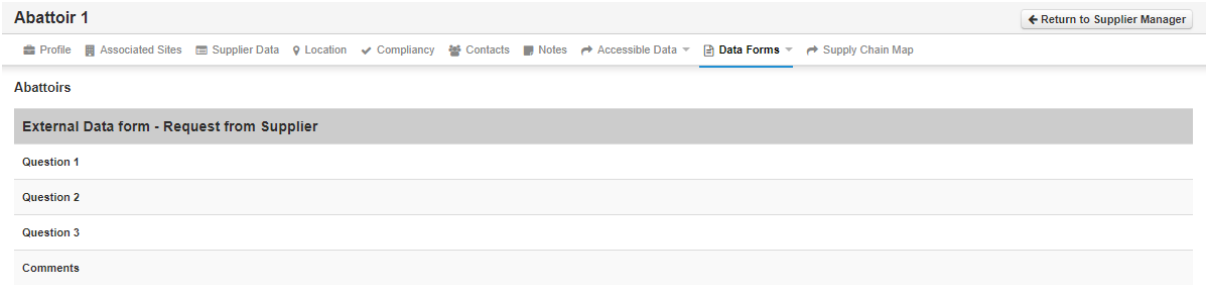
Step 4: The status is now set as **Pending**



Step 5: Once supplier completes you can see the details of the form by selecting **View Details**

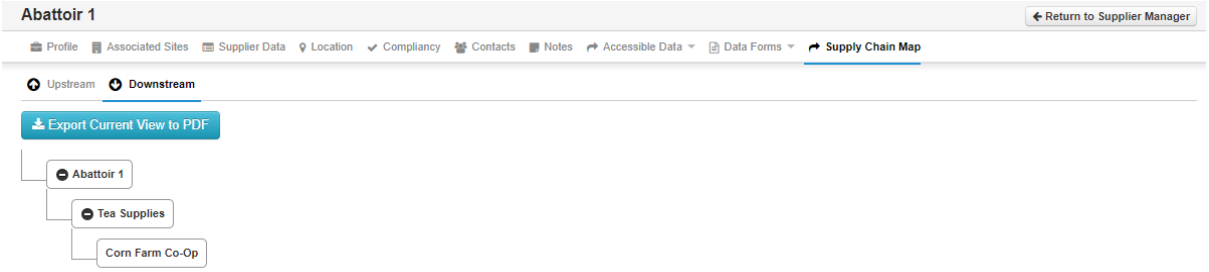


Step 6: The external forms opens up, with the data the supplier submitted



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



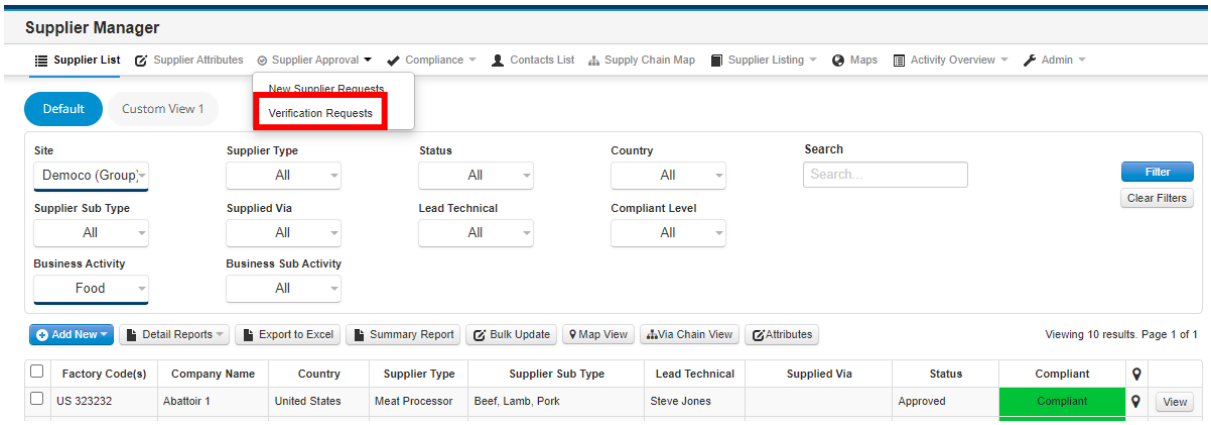
6. SUPPLIER APPROVAL

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.

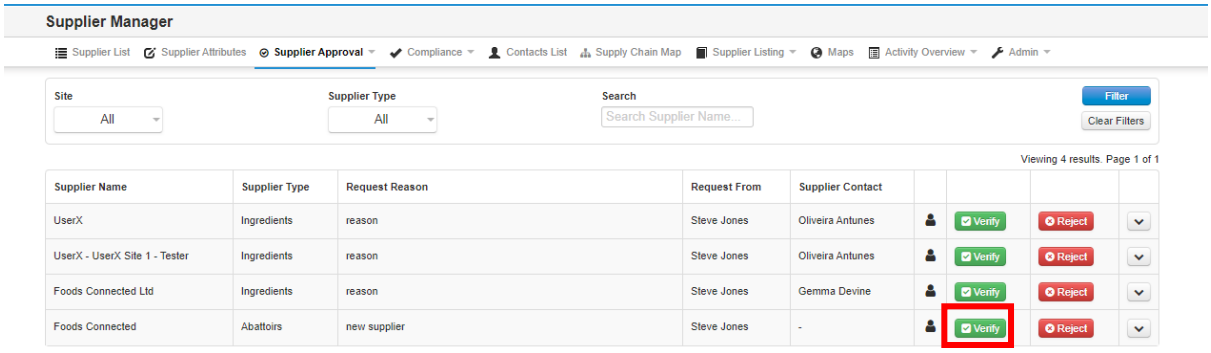
6.1 VERIFICATION REQUESTS

6.1.1 VERIFY SUPPLIER

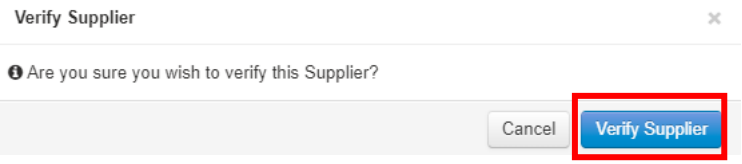
Step 1: The verifier gets notified that a new supplier needs verified. They must navigate to the **Supplier Approval** tab then **Verification Requests.**



Step 2: You can now see the suppliers that need verified first. Select **Verify** beside your supplier



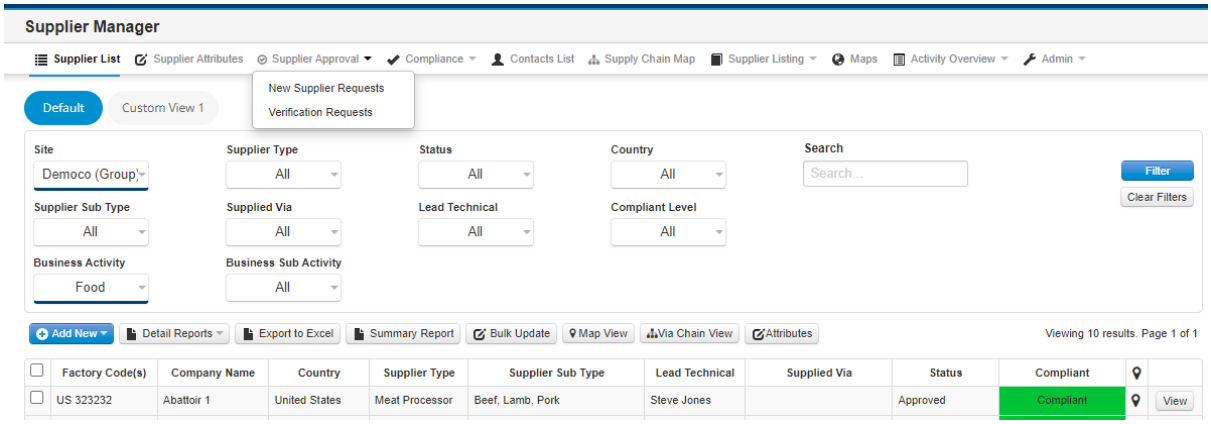
Step 3: Now select **Verify Supplier**



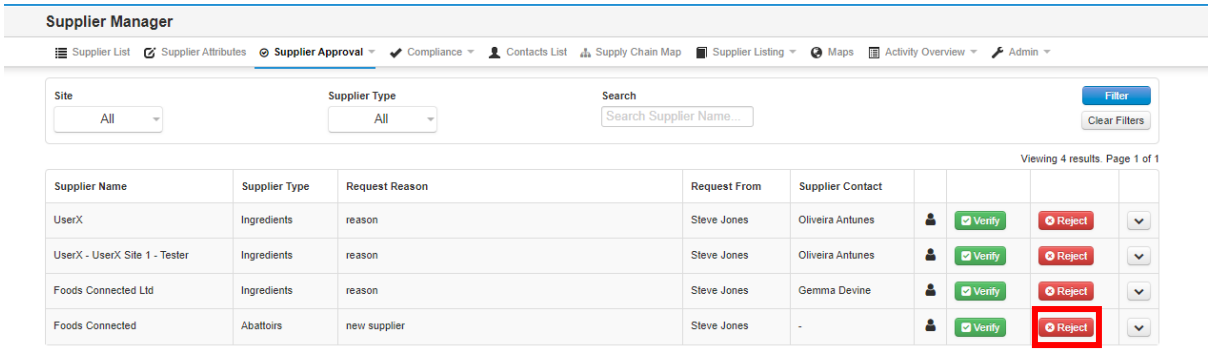
Step 4: Supplier is now verified and in your **New Supplier Requests** tab

6.1.2 REJECT SUPPLIER

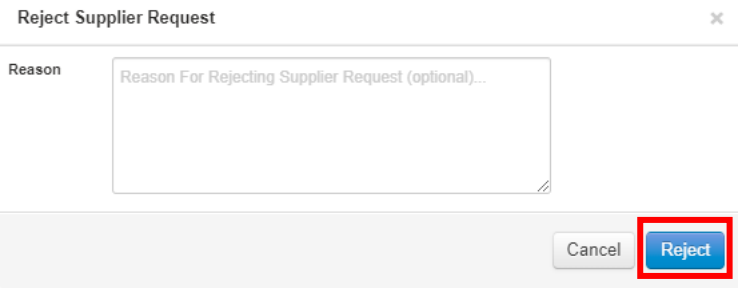
Step 1: The verifier gets notified that a new supplier needs verified. They must navigate to the **Supplier Approval** tab then **Verification Requests.**



Step 2: You can now see the suppliers that need verified first. To reject a request select **Reject** beside your supplier.



Step 3: Give a reason for reject, then select **Reject**

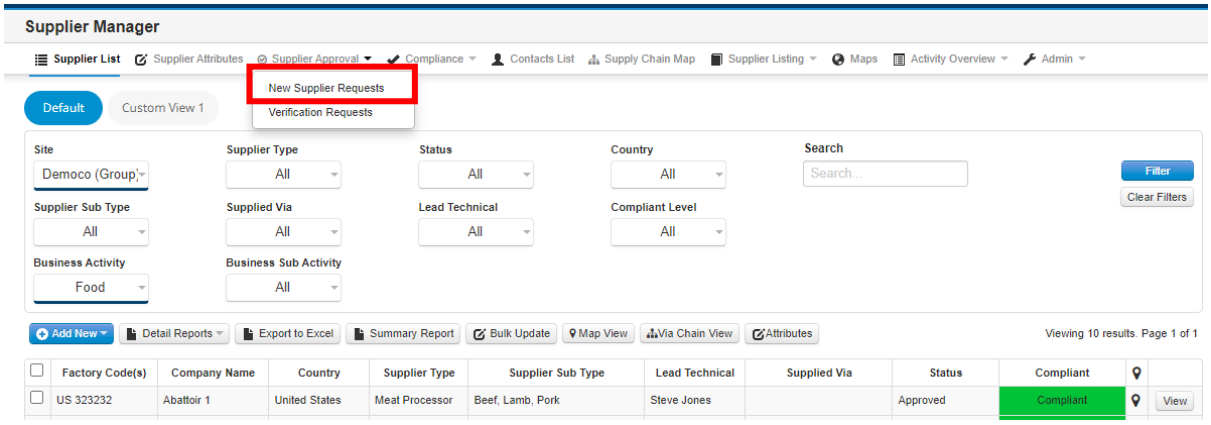


Step 4: The supplier has now been rejected and will not enter the supplier approval process.

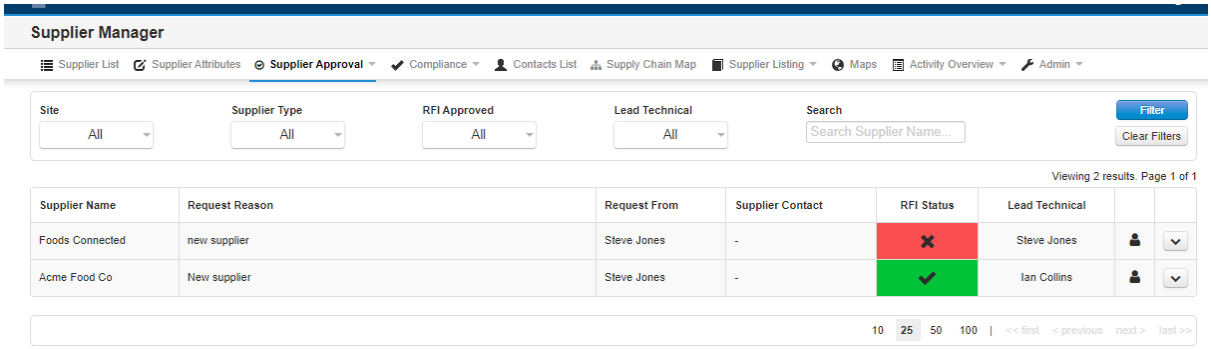
6.2 NEW SUPPLIER REQUESTS

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.**



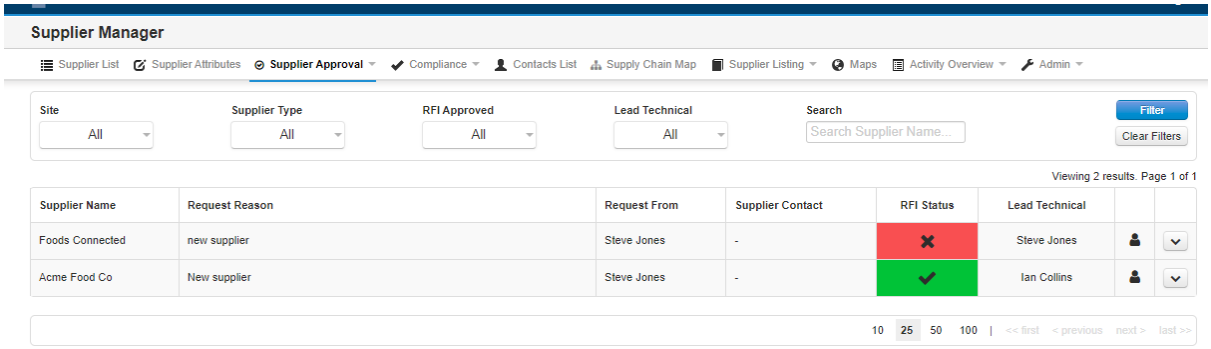
Step 2: You can now see the suppliers in the supplier approval process.



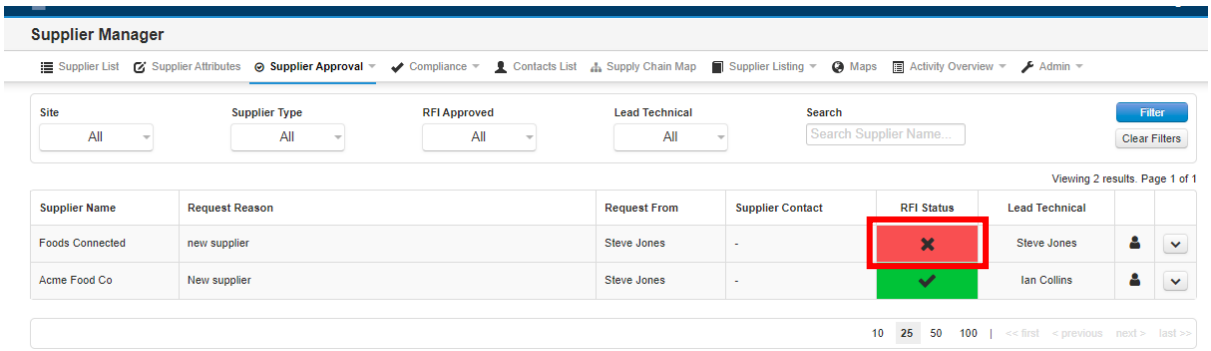
RFI stands for Request for information, if you have this activated on point 1.4.1 and chosen a questionnaire you cam send this RFI to your supplier

6.2.1 RFI STATUS

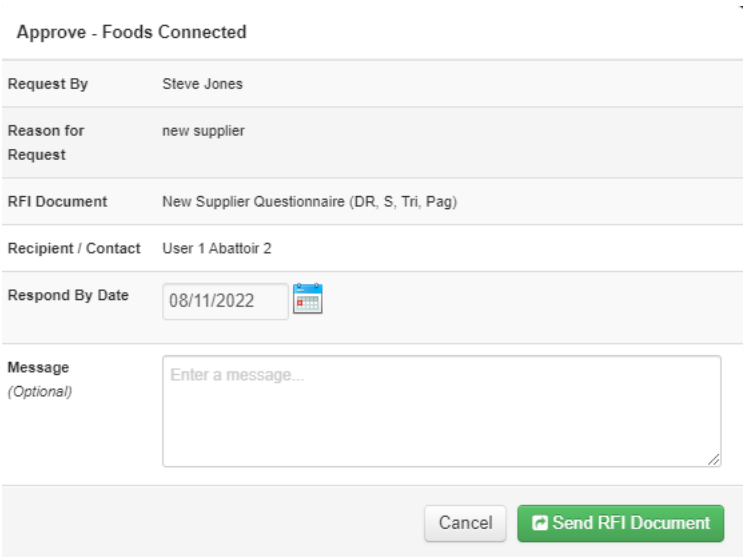
Step 1: First thing to do here is to send your Request For Information questionnaire if you have this activated. (If you do not have this activated, please ignore this point)



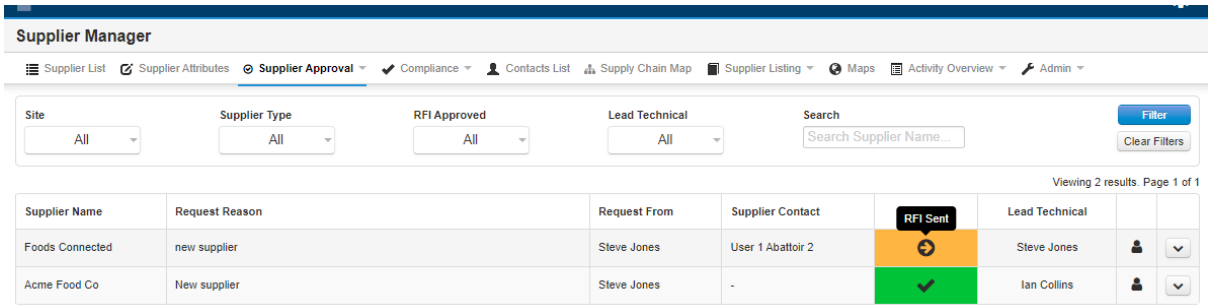
Step 2: Hoover over the red RFI Status, then select.



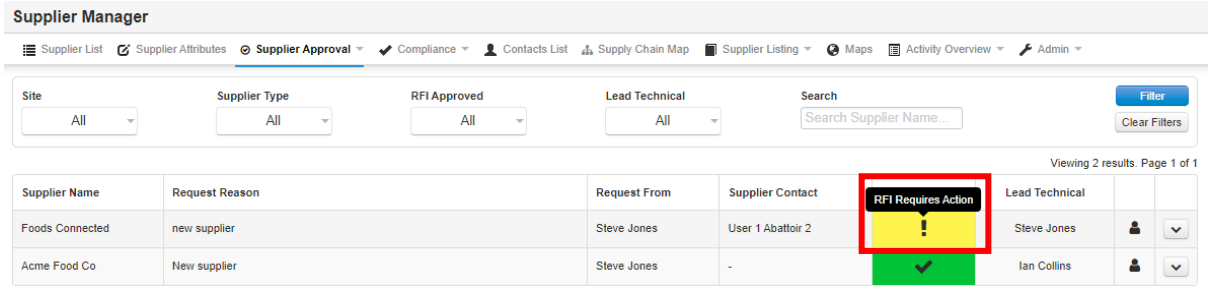
Step 3: Now select the recipient, the respond by date & a message if you like. Select send RFI document when done. (Before you send make sure you have a supplier contact set)



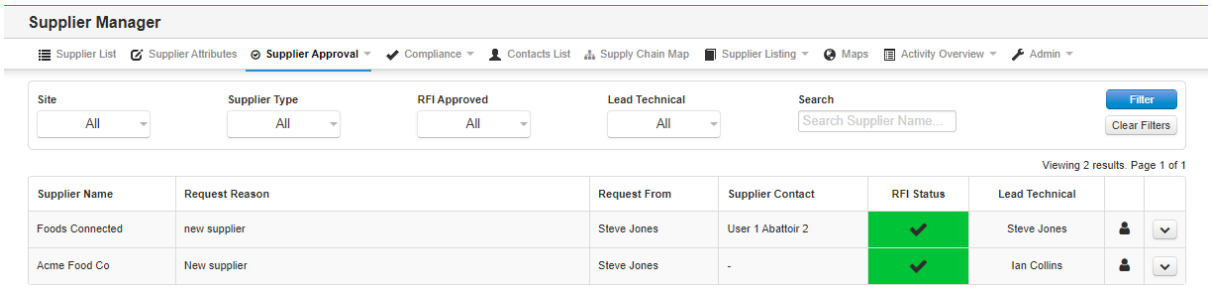
Step 4: The RFI status is now amber and RFI sent



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



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.

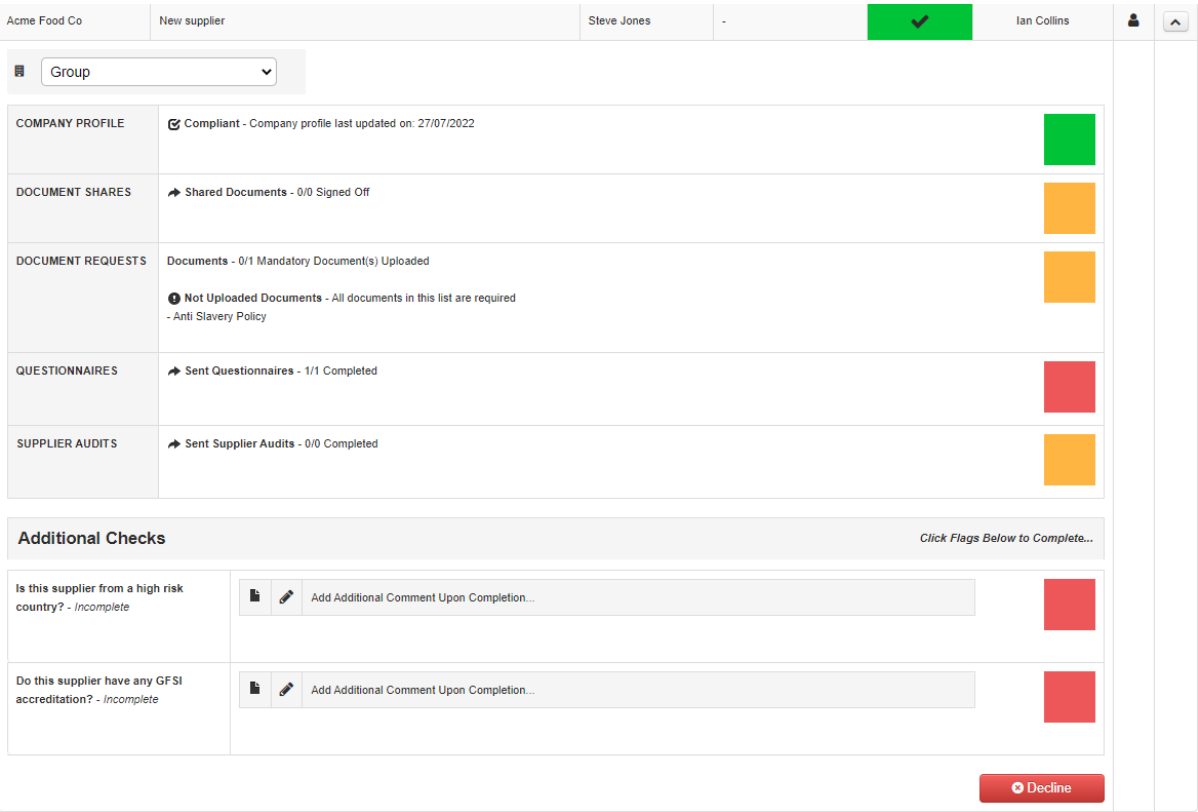


6.2.2 APPROVING / DECLINING A SUPPLIER

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

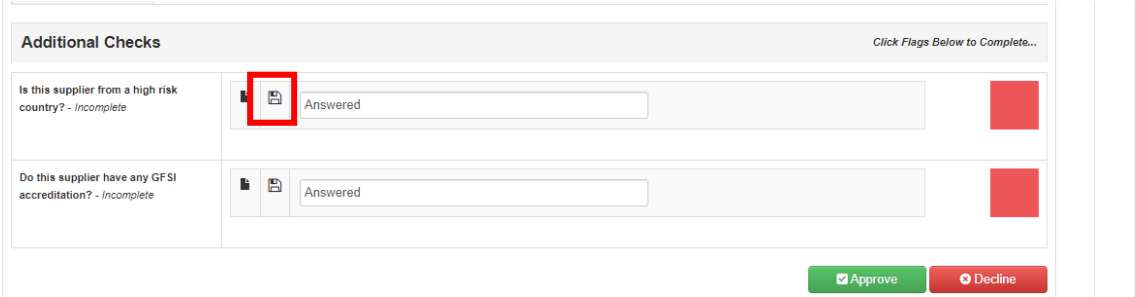
their respective tools and you confirm that these questionnaires, documents etc are approved in the tool. This then updates here in the Supplier Approval tab, new supplier requests.

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.

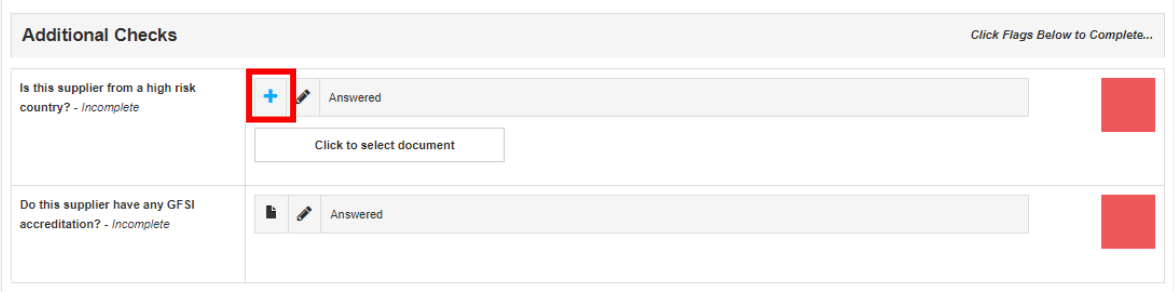


Step 2: If you have setup additional rules/checks in your supplier approval rules in point 1.2.1.9 these will appear at the bottom, like above. To answer these additional rules/checks, select the pencil icon then select save when done. (If you haven't setup additional checks ignore this step)

Step 3: Fill in your answers then select **Save**

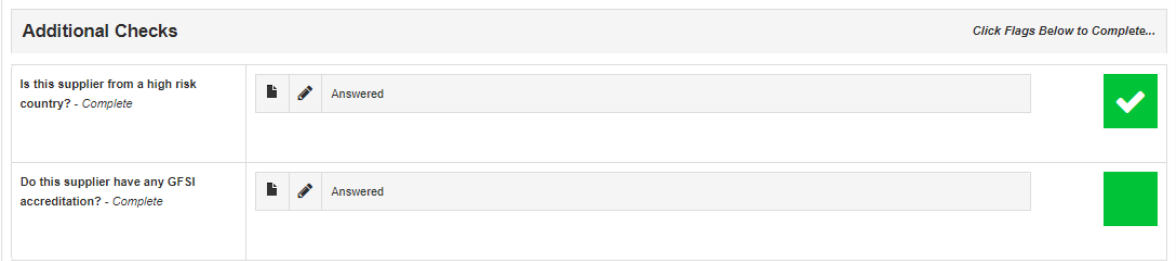


Step 4: You can also attach a file here too,



Step 5: Once complete hover over the red square & select to state that it is complete.

Step 6: This now turns green



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.

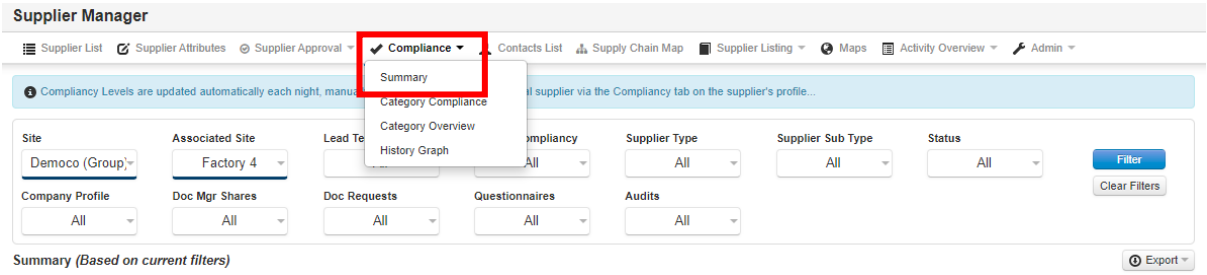
7. COMPLIANCE

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.

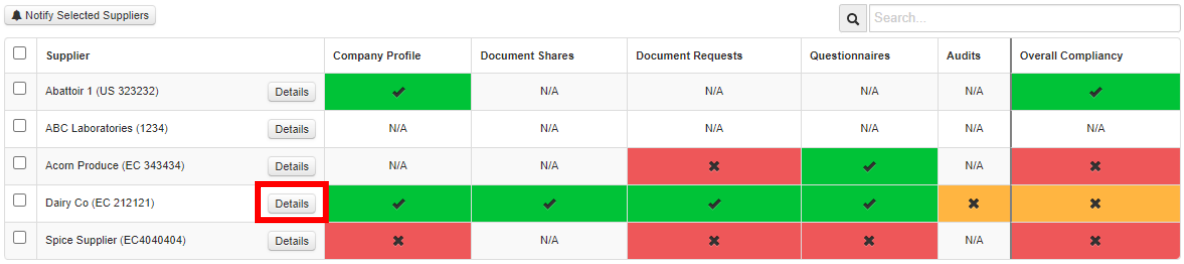
Step 1: Select **Compliance,** then **Summary**



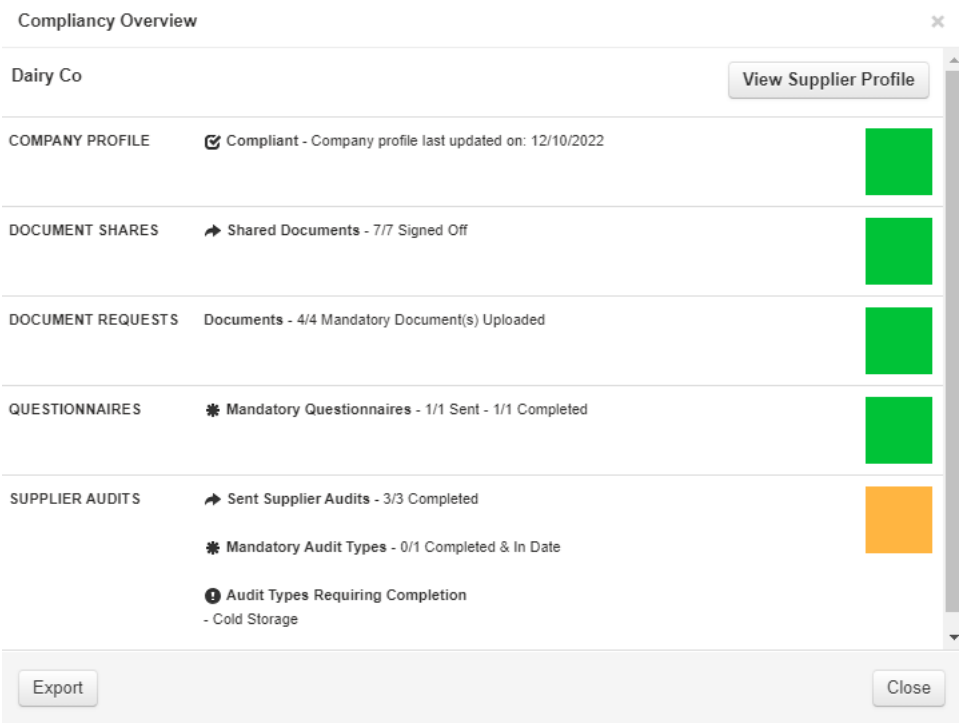
7.2 DETAILS, WHAT THIS IS & HOW TO USE

The Details button lets you deep dive into what transactions and records there is between you & that supplier.

Step 1: Select **Details**



Step 2: Now you can see further details on what has & hasn't been completed by the supplier.



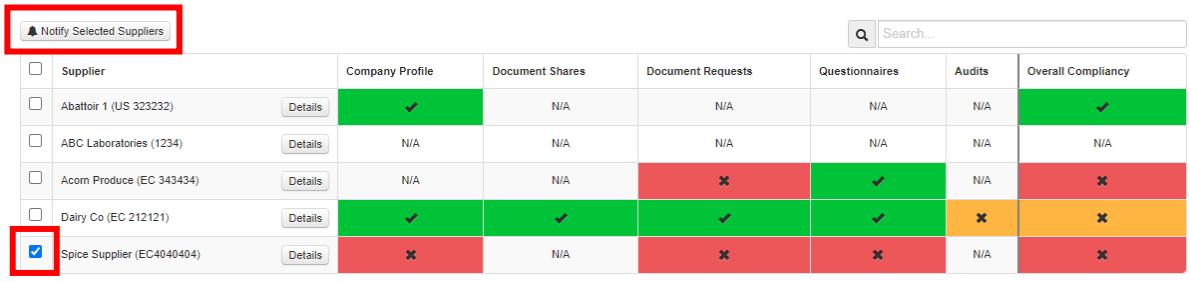
Step 3: If you want to view the suppliers profile from here select **View Supplier Profile.** This will open their profile on another tab

Step 4: Once done select close.

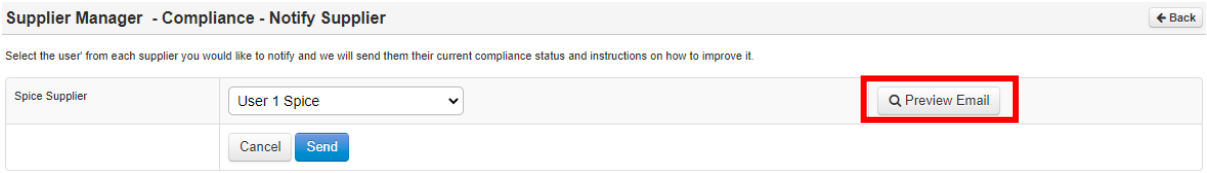
7.2.1 NOTIFY SELECTED USERS, WHAT THIS IS & HOW TO USE

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.

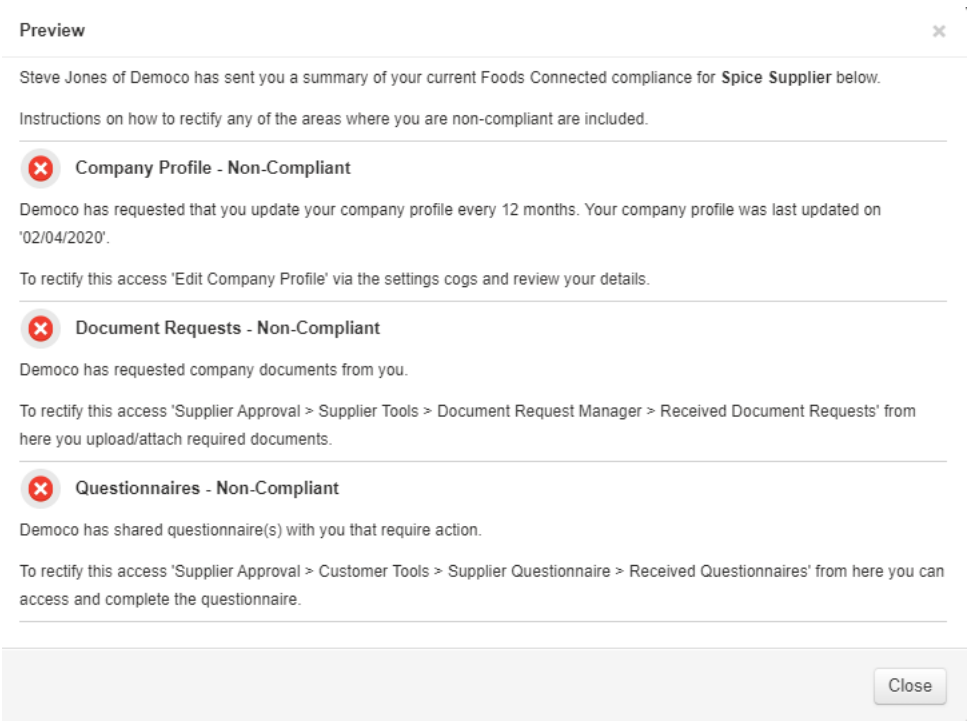
Step 1: Select the suppliers that haven't submitted information. So that would be any supplier with a red x against a tool. The select **Notify Selected Suppliers**



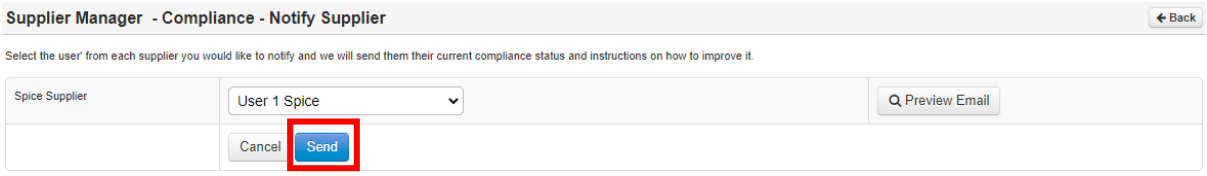
Step 2: If you now select **Preview Email**. It will show you what type of mail your suppliers will receive.



Step 3: The amil looks like this. Select **Close** when done



Step 3: Select user to send to & when done select **Send**.

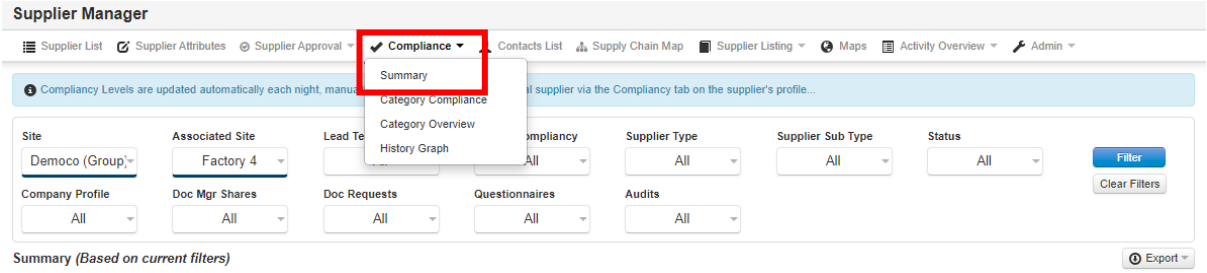


Step 4: Reminder now sent

7.3 CATEGORY COMPLIANCE

If you are using Category Compliance rules and have it turned on this is whereThe summary 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**



8. CONTACTS LIST

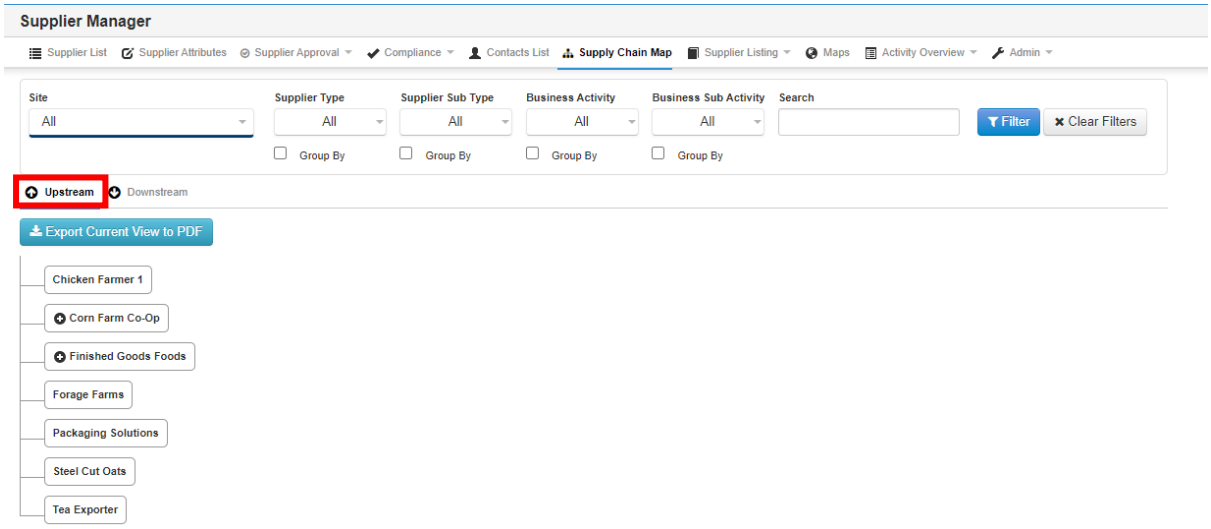
Is literally just a list of all contacts for your suppliers that are active on Foods Connected. This will show ALL contacts for those suppliers

9. SUPPLY CHAIN MAP

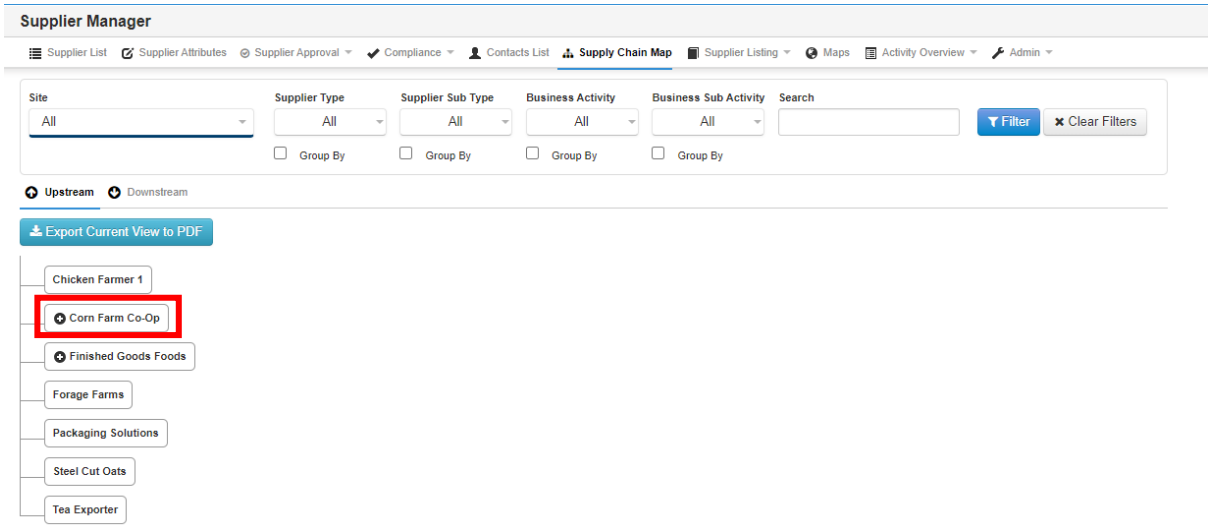
Is a chain map of your suppliers on Foods Connected and the relationships between them. Here you can see the chain for suppliers for each of your sites.

9.1 UPSTREAM

Step1: To see the upstream supplier relationship, select **Upstream**



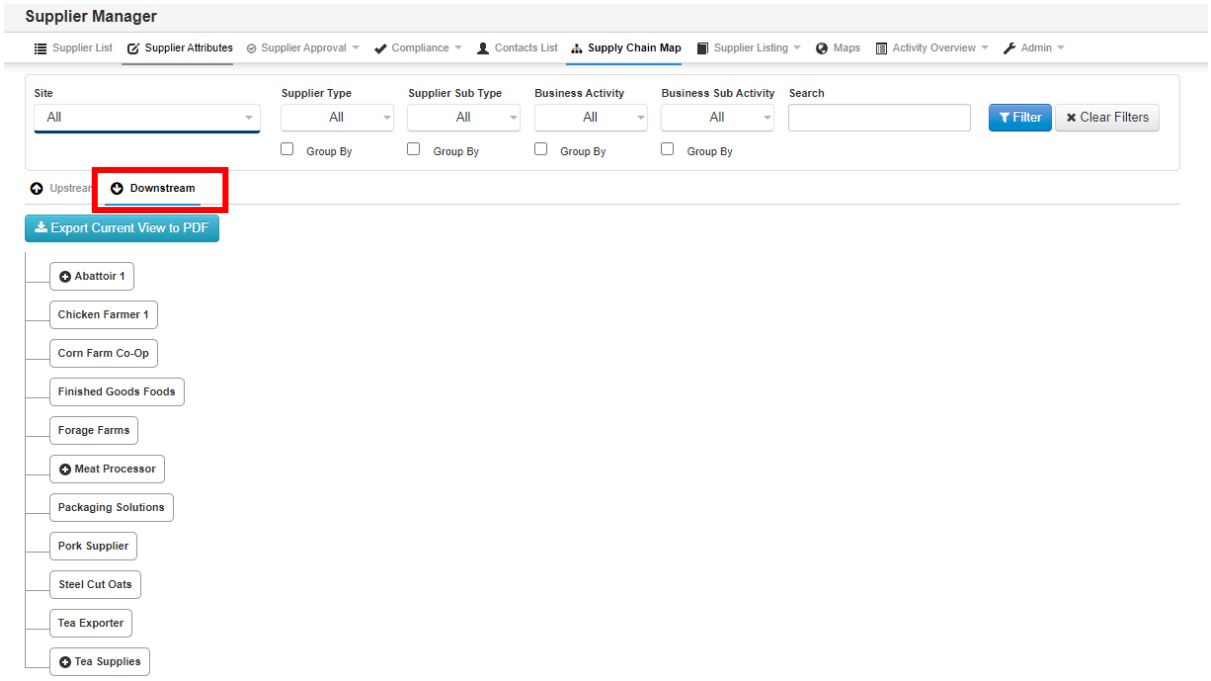
Step2: You can now see the upstream supply from suppliers. Select the suppliers with a plus to view.



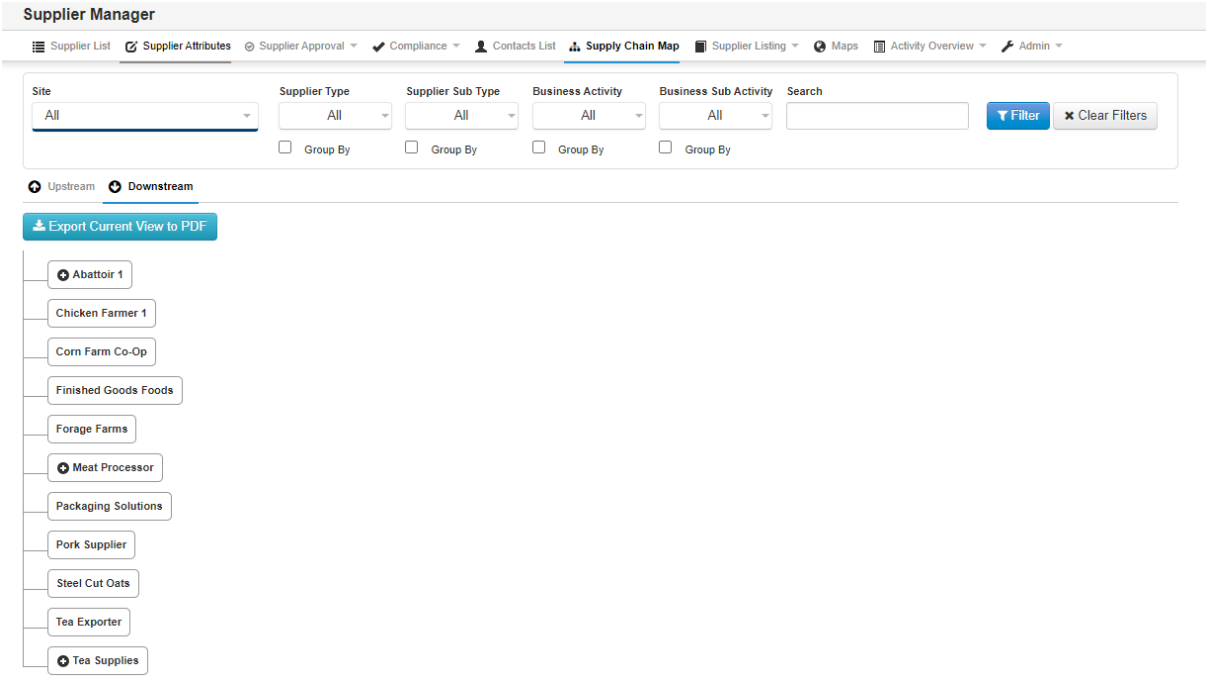
Step3: Select the suppliers with a plus to view further

9.2 DOWNSTREAM

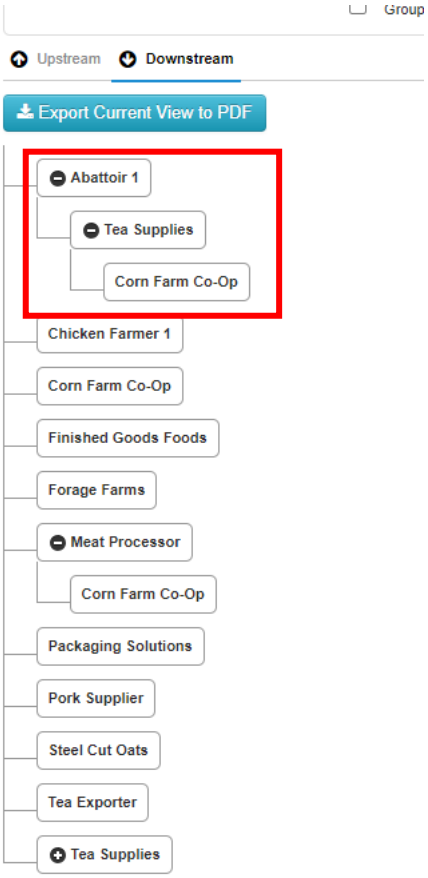
Step1: To see the downstream supplier relationship, select **Downstream**



Step2: You can now see the downstream supply from suppliers. Select the suppliers with a plus to view.



Step3: Select the suppliers with a plus to view further



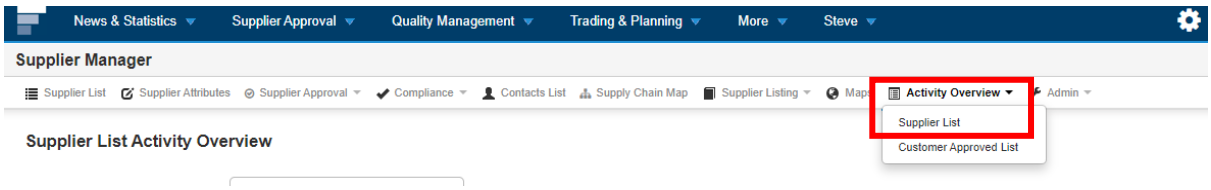
10. MAPS

11. Activity Overview

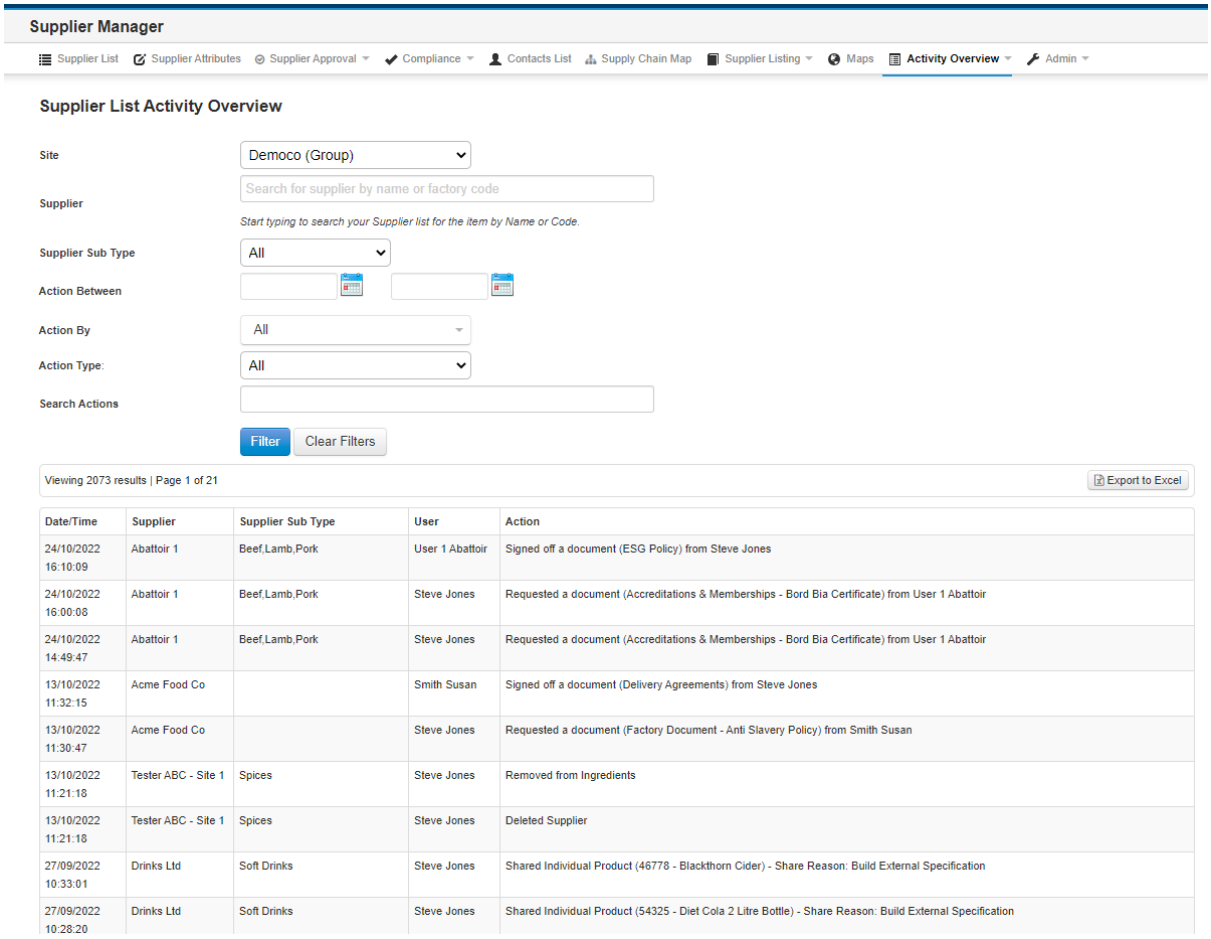
Each tool on Foods Connected has an Activity Overview which lets you see the overall activity for this tool.

11.1 SUPPLIER LIST OVERVIEW

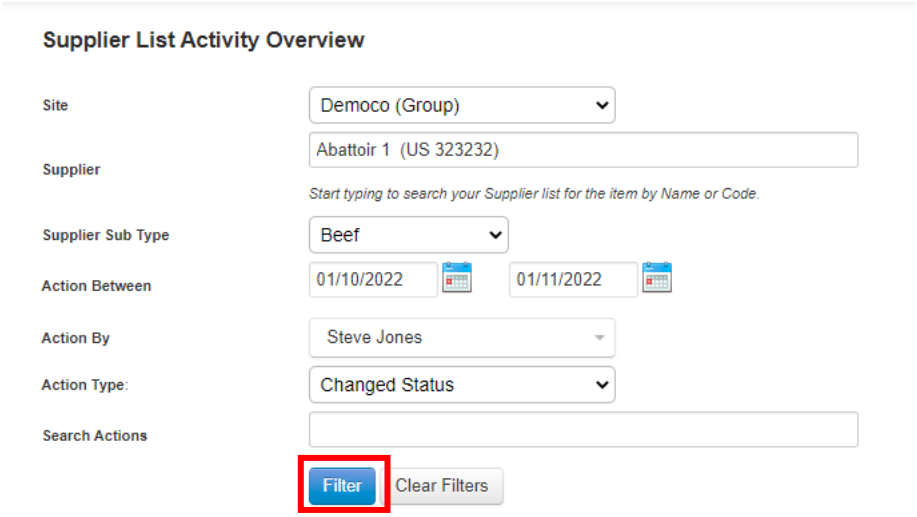
Step1: Select **Activity Overview** then select **Supplier List.**



Step2: You can now see the activity for the **Supplier List.**



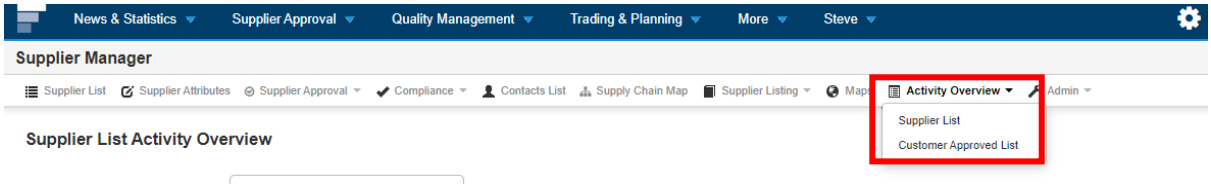
Step 3: You can now use the filter fields below to filter for specific activity. Select options the select **Filter** when done



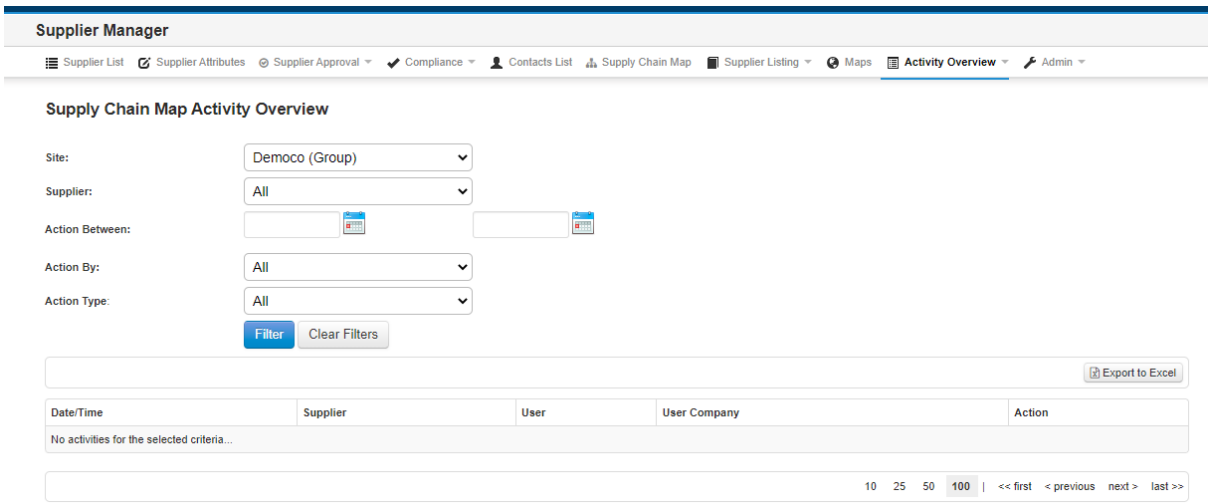
Step 4: When done select **Clear Filters.**

11.2 CUSTOMER APPROVED LIST

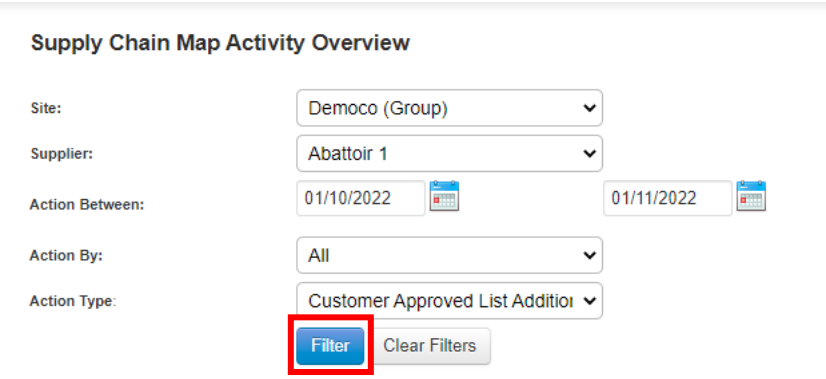
Step1: Select **Activity Overview** then select **Customer Approved List.**



Step 2: You can now see the activity for the **Customer Approved List**



Step 3: You can now use the filter fields below to filter for specific activity. Select options the select **Filter** when done



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