

How to Create a New Supplier

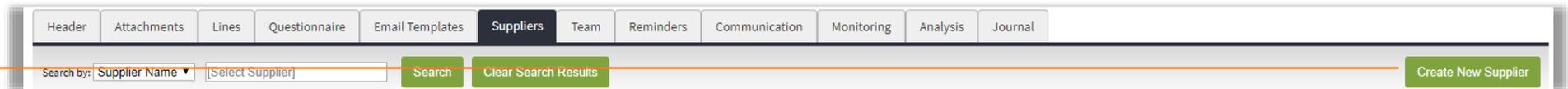
There are multiple areas within the Sourcing module from where you can create a new supplier. This guide talks you through how to create a supplier:

- » At Negotiation Level
- » From a Dashboard Quick Link

Note: Only users with the relevant system-access roles are permitted to create new supplier accounts. This section is covered in the Administration user guide.

To Create a Supplier from within a Negotiation:

From within a Negotiation, you can create a new supplier from the **Suppliers Tab**. To do this, use the following instructions:



1 Click the **Create a New Supplier** button.

The 'Create Supplier' pop-up form contains the following fields and buttons:

- Supplier Name:** Text input field containing 'ACU Design'.
- Contact Name:** Text input field containing 'Dominic Urmson'.
- Email Address:** Text input field containing 'd.urmson@waxdigital.com'.
- Buttons:** 'Create Supplier' and 'Cancel' buttons at the bottom.

2 The **Create Supplier** pop up will then appear.

3 Type **Supplier Name, Contact Name** and **Email Address** fields.

4 Click the **Create Supplier** button.

Note: The contact name should be that of the main contact who you wish to respond to the tender from that organisation.

The screenshot shows the 'Suppliers' tab in the WAXX DIGITAL system. At the top, there are navigation tabs: Header, Attachments, Lines, Questionnaire, Email Templates, Suppliers (active), Team, Reminders, Communication, Monitoring, Analysis, and Journal. Below the tabs is a search bar with 'Supplier Name' selected, a search button, and a 'Clear Search Results' button. A 'Create New Supplier' button is in the top right. The main area is split into two panels. The left panel, 'Available Suppliers', shows 257 results. A supplier named '123 test' is highlighted with a pink border and a warning message: 'Warning: This supplier is not approved'. Below the name, it lists '#2 Heating fuel oil', 'Asia Central, Approved', and 'CB Test' with email 'c.burke@waxdigital.com'. A 'Select' button is at the bottom right of this panel. The right panel, 'Selected Suppliers', shows 1 result. The same supplier '123 test' is now listed as 'ACU Design' with the same warning message. Below it, the name 'Dominic Urmson' and email 'd.urmson@waxdigital.com' are shown. A 'Remove' button is at the bottom right of this panel. An orange arrow points from the 'Remove' button in the 'Selected Suppliers' panel to a callout box.

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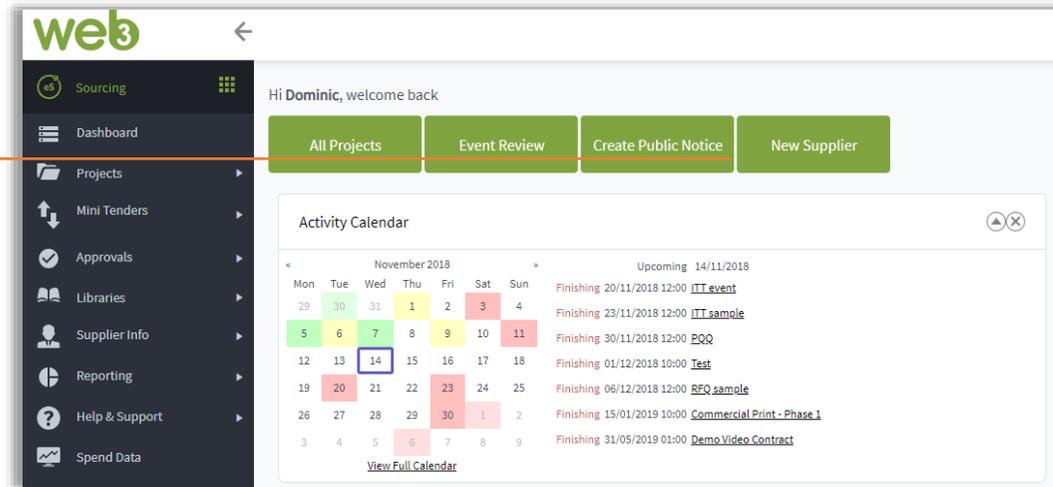
The supplier will now appear in the **Selected Suppliers List** on the negotiation.

Note: The supplier's status will be **Not Approved** at this stage.

The supplier will receive a system-generated notification informing them that they have been added as a new supplier within your company. The supplier will have to follow the link to log in to the system and complete the registration form.

To Create a New Supplier from the Dashboard:

1 Click the **New Supplier** quicklink.



2 The **Create Supplier** pop up will then appear.

The 'Create Supplier' form is shown with three input fields: 'Supplier Name' containing 'ACU Design', 'Contact Name' containing 'Dominic Urmson', and 'Email Address' containing 'd.urmson@waxdigital.com'. At the bottom are two buttons: 'Create Supplier' and 'Cancel'. An orange box highlights the three input fields.

3 Type **Supplier Name**, **Contact Name** and **Email Address** fields.

Note: The contact name should be that of the main contact from that organisation.

4 Click the **Create Supplier** button. The supplier will now appear in your admin centre with a status of not approved.