

## 3iVerify Supplier Management Jump Start

Thank you for your decision to purchase a subscription to 3iVerify. This purpose of this guide is to get you up and running quickly with the system. Please work through this document to get going quickly.

Note: All entities in 3iVerify will be express in Title case, e.g. Supplier Questionnaire to clarify that we are referring to a 3iveirfy entity.

### Getting Started:

In this section we will walk you through logging in and getting started with managing suppliers, sending questionnaires, certification requests and managing supplier documents.

#### 1. Logging in to 3iVerify:

3iVerify is a cloud application and is hosted on the Microsoft Azure cloud. This means that the web application 'pages' is hosted on a server in a secure Microsoft Azure data centre (usually in the Country your business resides in) and the database that your data is stored on is also hosted on a specialist database server. For this reason, we required the following information before you can login to 3iveirfy:

- **Web application URL:** e.g. <http://us.3iveirfy.com> – this is usually the physical server is closest to your location. The close this is the faster the web application will run.
- **Account name:** e.g. USA01 – this is needed to direct the web application to the correct database that our data is stored in. This is not case sensitive.
- **User name:** This is always your registered email address. This is not case sensitive.
- **Password:** This is the password that is initially set for you, or the password you have changed to after login. This is case sensitive.

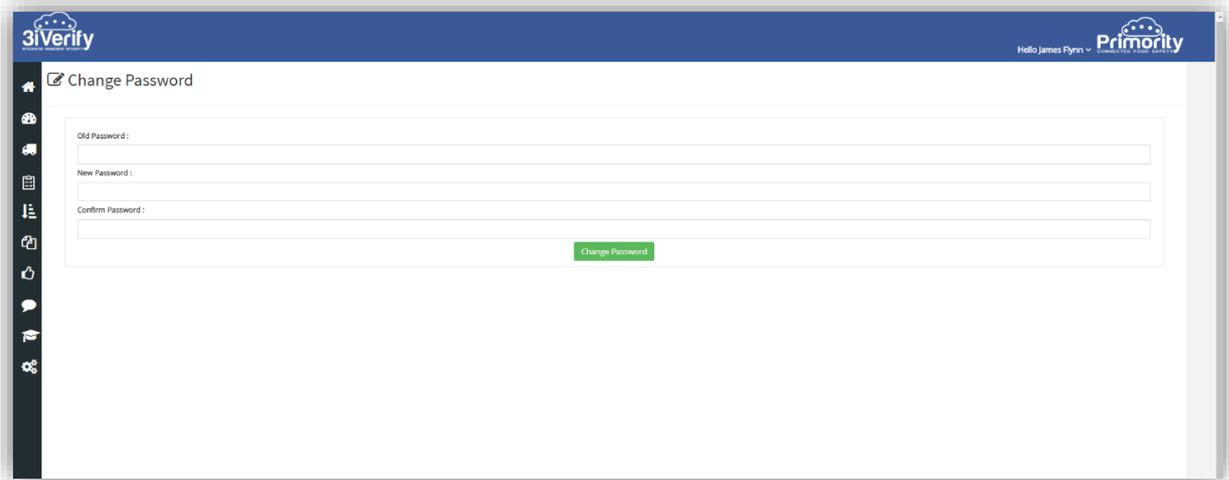
After you have been set up in 3iVerify you will be provided with the Web application URL, Account name, User name and Password. Use these to login to the system.



Note that if you forget your password you can click on the 'Forgot password' link underneath the Sign In button on the login page.

### Changing your password:

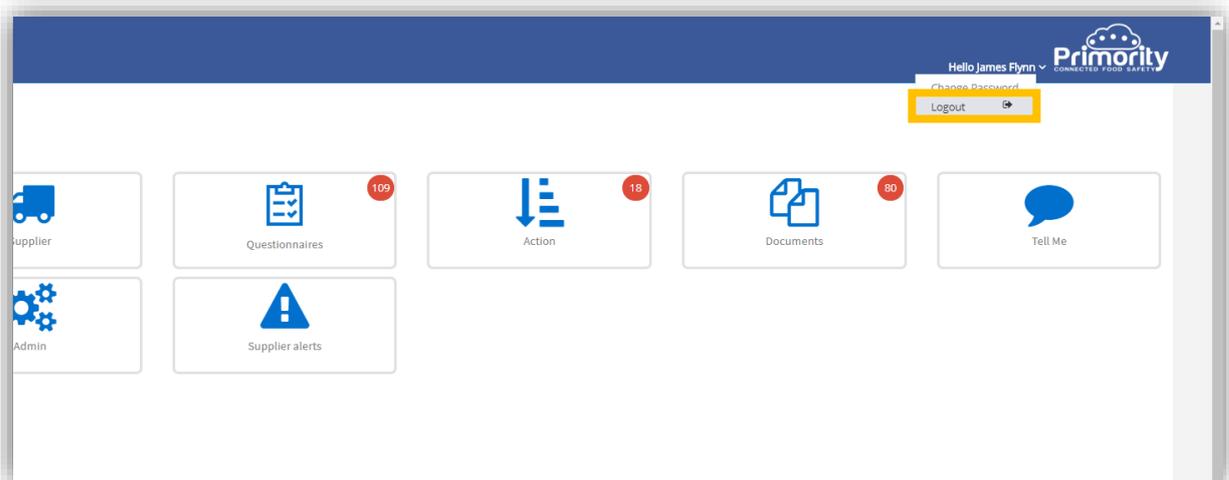
For security reasons, you should change your password the very first time you login. You can do this in the top right of the main header, where the system says “Hello, <Your Name>”. Here there is a menu option for changing your password. Please use this and complete the form as shown below.



The screenshot shows the '3iVerify' interface. At the top left is the '3iVerify' logo. At the top right, it says 'Hello James Flynn' and the 'Primority' logo. Below the header, there is a sidebar with various icons. The main content area is titled 'Change Password' and contains three input fields: 'Old Password:', 'New Password:', and 'Confirm Password:'. A green 'Change Password' button is located below the 'Confirm Password' field.

### Logging out of 3iVerify:

3iVerify will keep you logged in for up to 24 hrs. We do this so that you do not have to login multiple times, for example, when you are spending long periods working on supplier data as you may lose work when this happens. If you leave your PC unattended it is your responsibility to either lock your system OR logout of 3iVerify. You can log out by using the menu option in the top right of the main header where it says “Hello, <Your Name>”. See a screenshot of this below.



### Support:

If you have any technical issues with login or anything else, please email [support@primority.com](mailto:support@primority.com) and one of our team will respond as soon as possible.

## 2. Managing Suppliers:

Managing Supplier information is a key, but sometimes complex, task that will ensure that your business has up to date information on your Suppliers, their Contacts, the Materials they sell to your company. It is also how we will manage the details of who the Manufacturers are for these Suppliers and Materials they supply. This is important where the Supplier is a 'middle man' third party type of business like an import agent, broker, aggregator or wholesaler. In this section we will look in detail at the essentials of managing Suppliers, Contacts, Material and Manufacturers. For clarity, we will first define who these entities are and what the relationship is between them so that things are clear when you use 3iVerify:

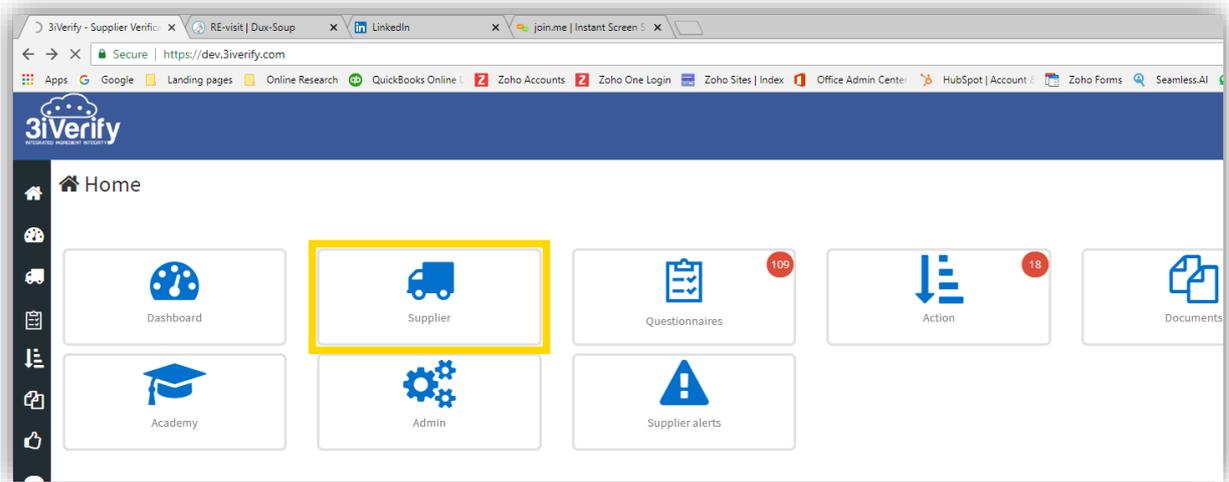
### Key Supplier Entities in 3iVerify:

- **Supplier** – This is the company you buy materials (raw materials, ingredients, food products, packaging or other supplies) from. They may, or may not, be the manufacturer of the products that they sell you. For example, ingredients manufacturers and agri produce growers often distribute their products through wholesalers, agents. Brokers and aggregators. In this case the Supplier will not be the Manufacturer.
- **Contacts** – These are the Contacts at the Supplier. Typically, we are interested in the Commercial, Emergency and Technical Contact at the supplier as these are key people that we may need to interact with. You can also store Additional Contacts in 3iVerify for larger organisations.
- **Material** – This is a list of Materials that you purchase for re-sale or for use in your Products or food operations. These may be finished products, raw materials, ingredients, chemicals, packaging and other supplies for which you need to monitor legality, quality.
- **Manufacturer** – This is the actual Manufacturer of the Material that you purchase. It is important to understand that there may be more than one Manufacturer for a given Material, e.g. commodities like sugar, salt, packaging, etc may come from multiple Manufacturers. They may also come from different Suppliers.

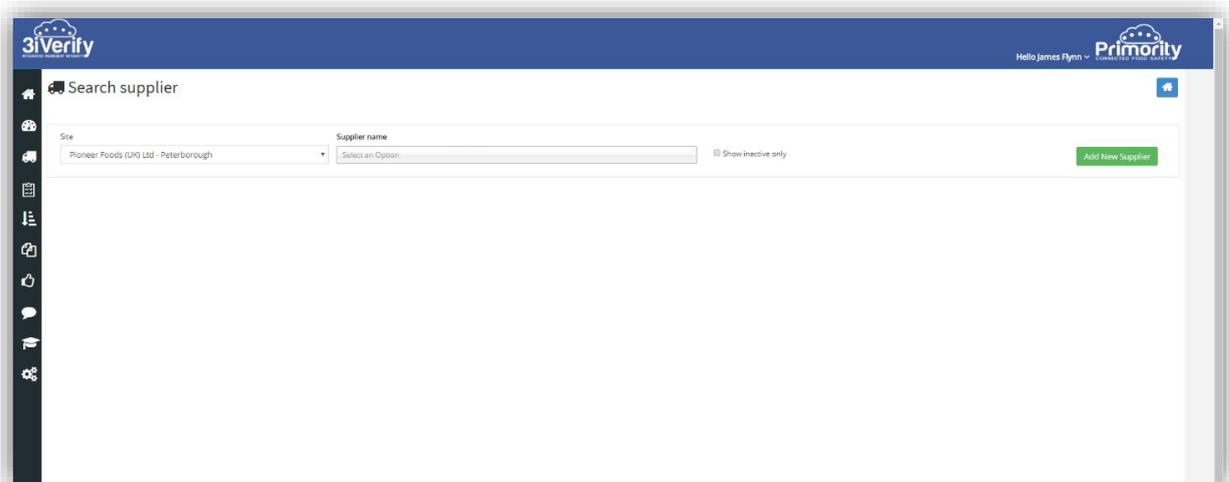
We will now focus on adding Suppliers overleaf.

## Adding a Supplier:

From the Main Menu in 3iVerify, click on the Suppliers icon as shown below:

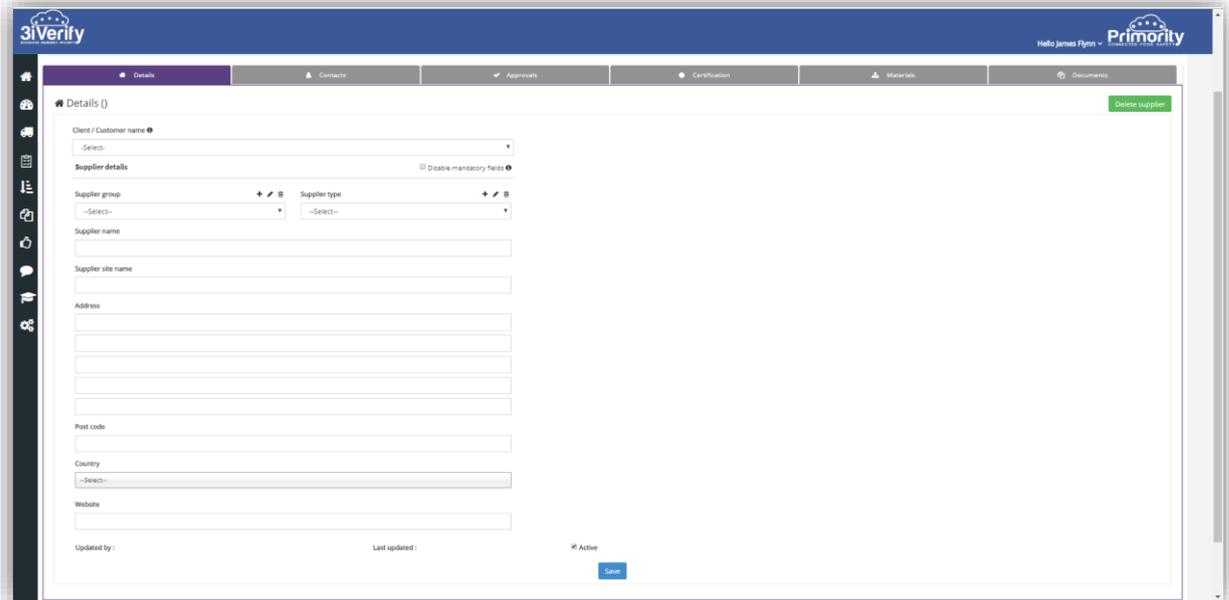


After loading the Supplier search screen will be shown like the one below:



This simple search screen allows you to quickly search for a Supplier, view inactive Suppliers and add new Suppliers. For now, we will focus on adding a new Supplier.

To add a new supplier, simply click on the green 'Add New Supplier' button. The screen below will be displayed:



The screenshot shows the '3iVerity' interface with a 'Details ()' form for adding a new supplier. The form is titled 'Details ()' and has a 'Delete supplier' button in the top right corner. The form fields are as follows:

- Client / Customer name: A dropdown menu with '-Select-'.
- Supplier details: A section with a 'Disable mandatory fields' toggle. It contains two dropdown menus: 'Supplier group' and 'Supplier type', both with '-Select-'.
- Supplier name: A text input field.
- Supplier site name: A text input field.
- Address: A multi-line text input field.
- Post code: A text input field.
- Country: A dropdown menu with '-Select-'.
- Website: A text input field.
- Updated by: A text input field.
- Last updated: A text input field.
- Active: A checkbox.
- Save: A blue button.

**Adding Materials:**

**Adding Manufacturers for Materials:**

**Deleting a Supplier:**

**Importing Supplies and Materials:**

3. Sending Supplier Approval Questionnaires:

4. Sending Material Approval Requests:

5. Sending Certification Requests:

6. Managing Supplier Documents:

Testing as a Supplier:

1. How to login as a Supplier
2. How to open a Supplier Questionnaire
3. Completing and submitting a Supplier Questionnaire for approval

Approving a Supplier Questionnaire:

1. Login to approve Supplier Questionnaires
2. Approving a Supplier Questionnaire
3. Rejecting a Supplier Questionnaire
4. Requesting Feedback on a Supplier Questionnaire
5. Unlocking a Supplier Questionnaire
6. Accessing the Final Approval

Managing Supplier Certification:

1. Setting the Applicable Assurance
2. Requesting the Assurance Certification from the Supplier
3. Checking Assurance Certification for a Supplier

Managing Supplier Documents:

1. Checking Uploaded Supplier Documents
2. Manually adding a Supplier Document

Using the Dashboard:

1. One Click Supplier Questionnaire Chase Up
2. Monitoring Certification Status
3. Monitoring Supplier Document Status