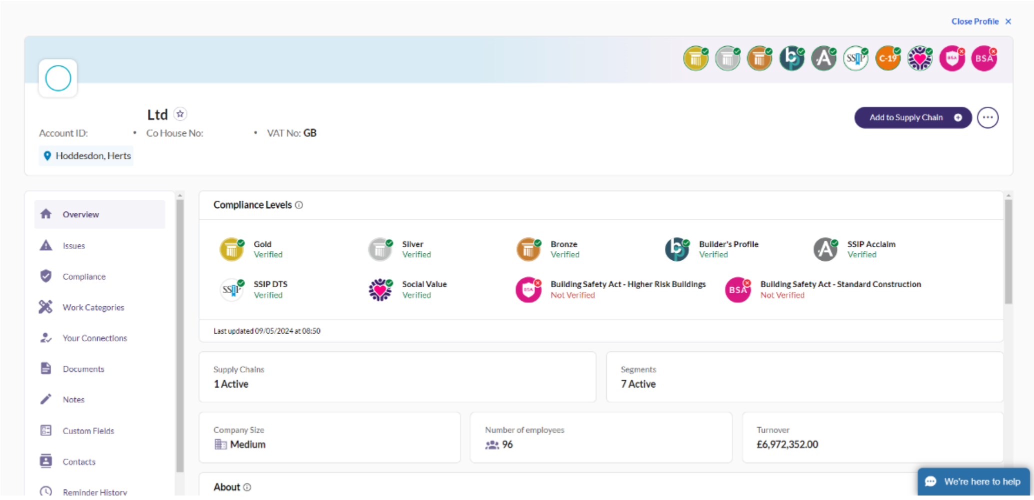
Buyer Portal – Supplier Profiles

How to navigate around Supplier Profiles on the Once For All platform

ONCE FOR ALL

Supplier Profiles

After searching for a supplier using **Find Suppliers**, or selecting a supplier in **Supply Chain**, you will be taken to the supplier's profile.

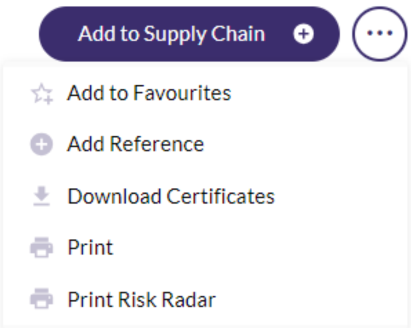


At the top, basic information about the supplier is provided. Here you can see their Account ID, Companies House number and VAT number.

The levels of membership and the status of these can be seen in the top right corner.

You can click the star icon to add this supplier to your favourites.

You can add the supplier to your supply chain with the **Add to Supply Chain** button. If you click the three dots, you will be presented with more options.

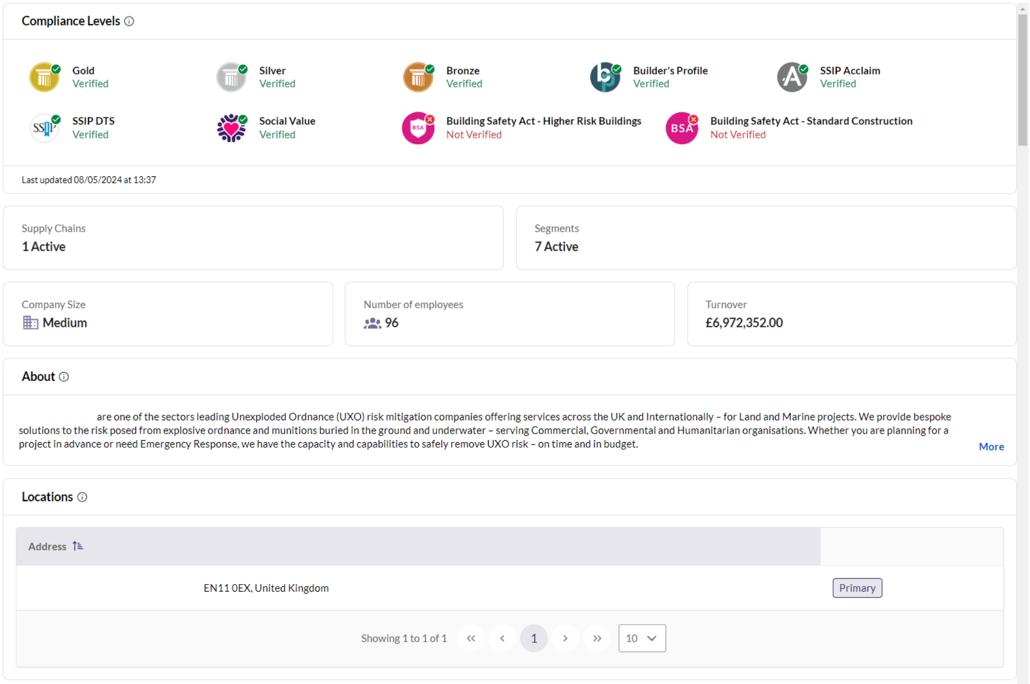


*Please note, to add, edit and remove Supplier Reference numbers, you will require the **Manage Supplier Reference** permission to be applied to your user account.*

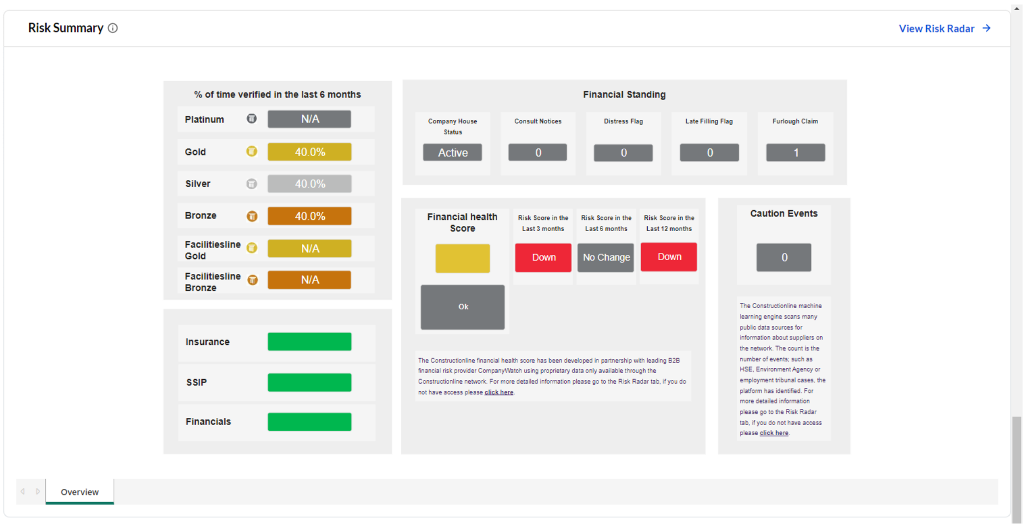
Use the menu on the left side of the page to navigate around the profile.

Overview

The **Overview** provides a summary of the account, the accreditation they hold, the company size, if they are in your supply chain and their locations.

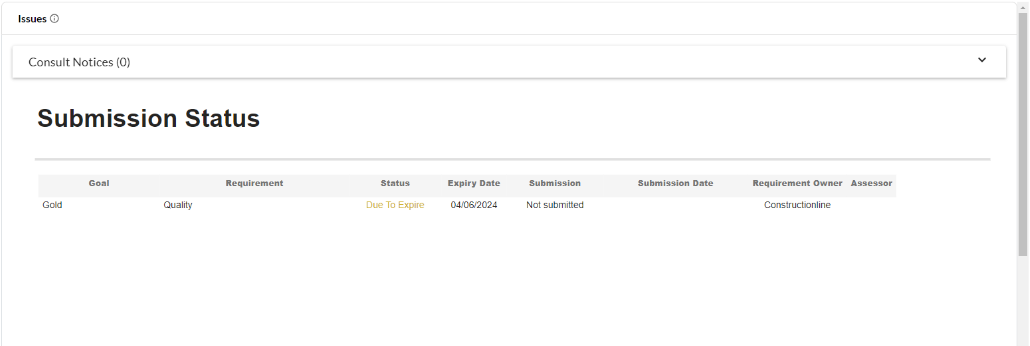


Risk Summary will give you a brief overview of a supplier's Financial Health Score, any Caution Events, their Financial Standing and the percentage of time they were last verified in the past 6 months.



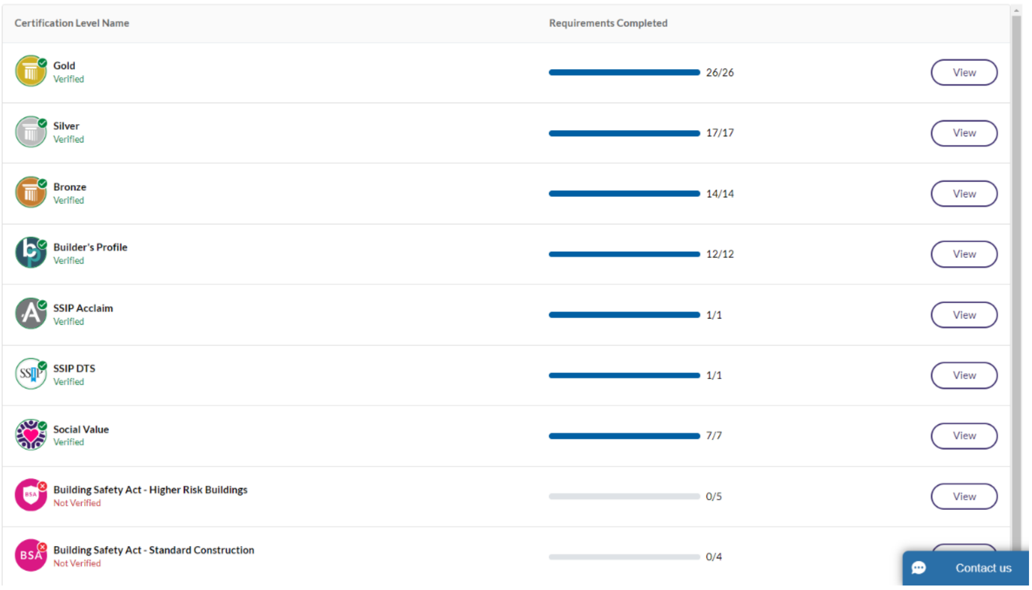
Issues

The **Issues** tab will show any **Consult Notices** and the **Submission Status** – if a supplier has a requirement due to expire, not verified or not yet submitted, it will appear here. You can also see the submission date and expiry date of the requirement.

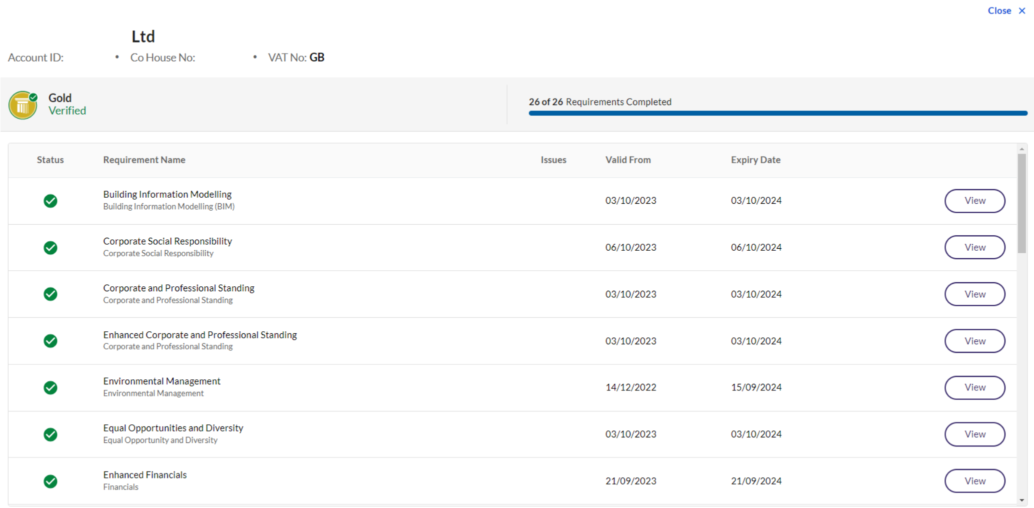


Compliance

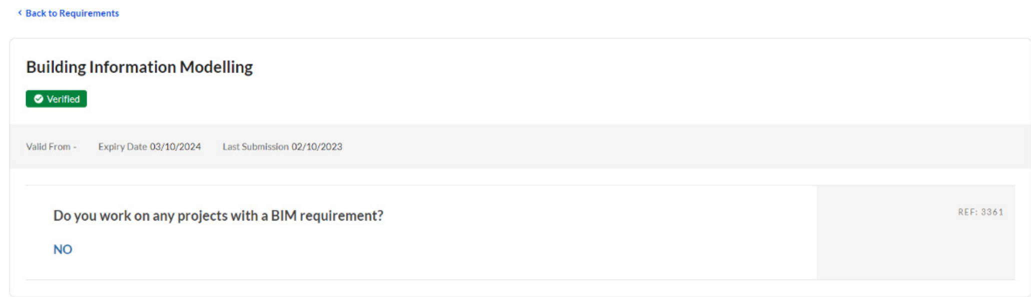
Compliance holds all the information the supplier would have submitted for their membership level. Please note, this will not include your Buyer Connections – instead you can view these in **Your Connections**.



Click **View** to review all the submissions for each level.



You can click **View** again to see the currently verified information for each requirement.

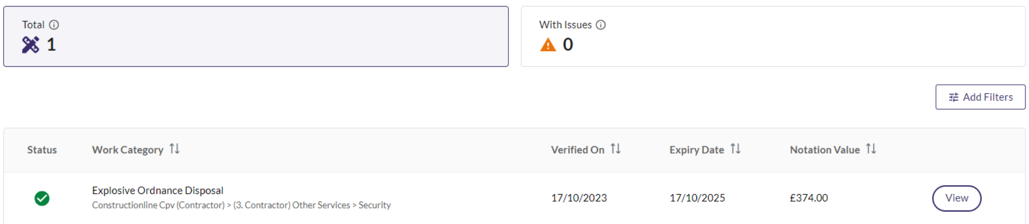


Work Categories

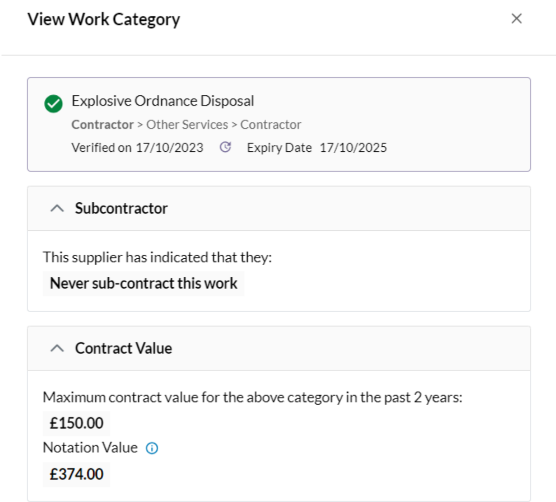
Work Categories will show you what work they do and the notation value for each category.

The work categories are split into the Total and With Issues.

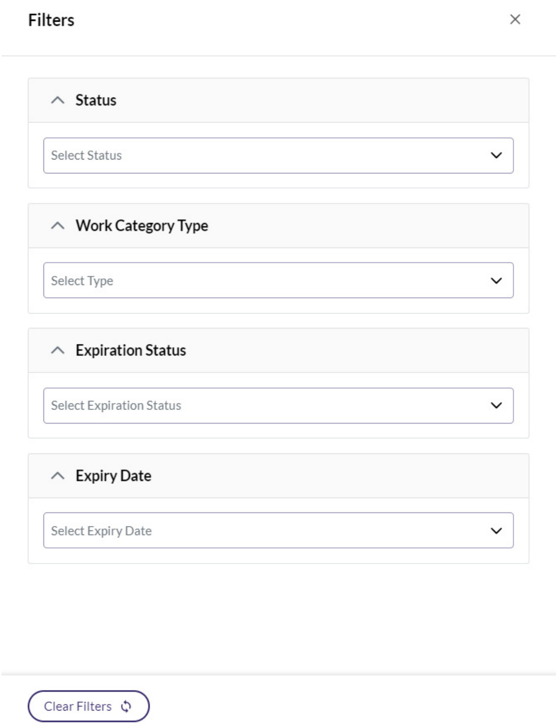
A work category that has issues will either be due to expire within 30 days, has expired, is missing required information (such as Financials or licences) and work categories that have not been completed yet.



Click **View** to see more information about the work category.



Add Filters will allow you to filter the work categories by **Status**, **Type**, **Expiration Status** and **Date**.



Your Connections

Here you can see all **Buyer Connections** that you have with a supplier.

The status refers to whether they meet your **Compliancy Policy**.

The **Connection Name** is the name of the segment the supplier has been placed in.

Click **View** to see the Private Goals within each segment.

	Connection Name	Type	Status	
✓	* Subcontractors and Consultants Constructionline - Unit	Segment	Verified	View
✓	**Demo - PL - Birmingham Constructionline - Unit	Project	Verified	View
✓	**Demo - PL - Brighton & Hove Constructionline - Unit	Project	Verified	View
✓	**Demo - PL - Plymouth Constructionline - Unit	Project	Verified	View
✓	**Demo - PL - Tower Hamlets Constructionline - Unit	Project	Verified	View
✓	MSG 240522 Constructionline - Unit	Project	Verified	View
✓	Subcontractors and Consultants Constructionline - Unit	Segment	Verified	View

You can click **View** again to see the currently verified information for each requirement.

Ltd

Account ID: • Co House No: • VAT No: GB

* Subcontractors and Consultants | Constructionline - Unit
Verified

28 of 28 Requirements Completed

Status	Requirement Name	Issues	Valid From	Expiry Date	
✓	Financials Financials		21/09/2023	30/09/2024	View
✓	Health and Safety Third Party / Exemption certificates Health and safety		08/03/2024	23/03/2025	View
✓	Areas of Operation Identity		21/09/2023	21/09/2024	View
✓	Branch Office Identity		21/09/2023	21/09/2024	View

Documents

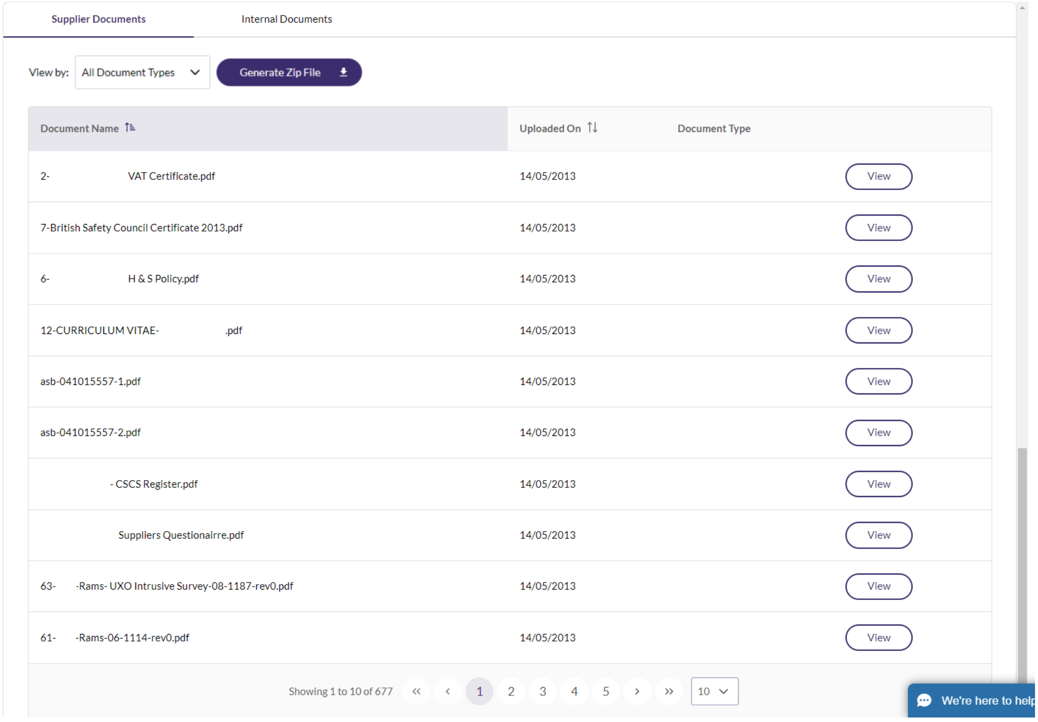
Documents will give you a list of the documents the supplier has uploaded.

Click **View** to open the document.

Select the **View by** drop-down to filter the document types and show only specific types of documents, for example, Insurances.

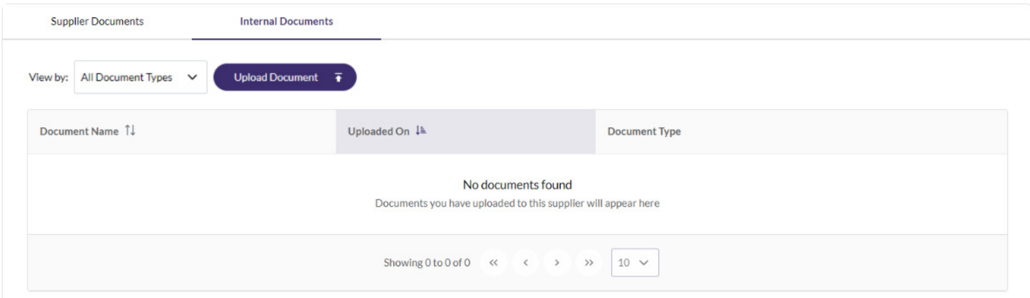
You can generate a zip file will all documents by selecting **Generate Zip File**. The zip file will be available in Download Manager once complete.

*Please note, to add a document type, the **Manage Supplier Document Tags** permission must be applied to your user account.*



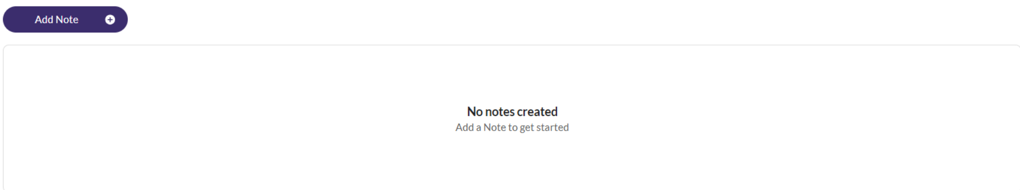
*Please note, to add a note, the **Manage Supplier Profile Notes Add** permission must be applied to your user account.*

You can also upload your own documents to a supplier's profile in **Internal Documents** by selecting **Upload Document**.



Notes

Notes is where users can add internal notes about the supplier, which are viewable to all other users in the organisation.



Select **Add Note** to create a new note on the profile.

*Please note, to add a document, the **Manage Supplier Documents** permission must be applied to your user account.*

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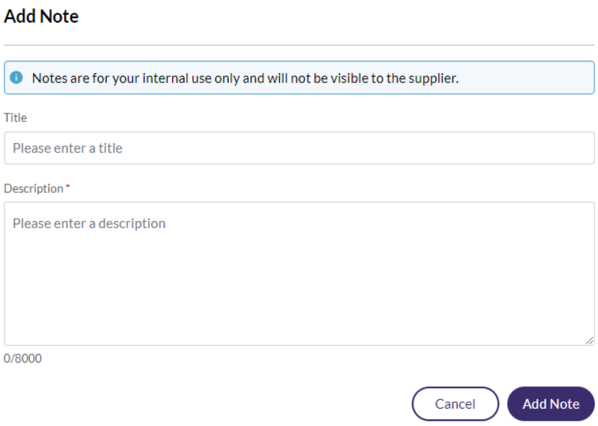
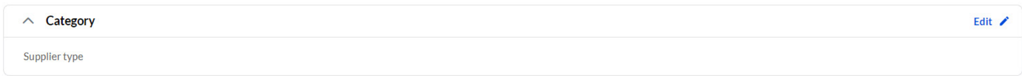
*Please note, to edit a custom field, the **Manage Supplier Custom Fields** permission must be applied to your user account.*

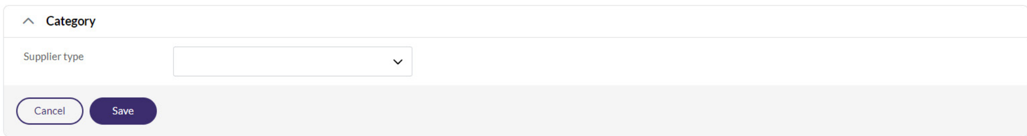


Custom Fields

Custom Fields will allow you to attach a number of internal data points to a supplier – for example, your own review date.



Click **Edit** to amend the information.



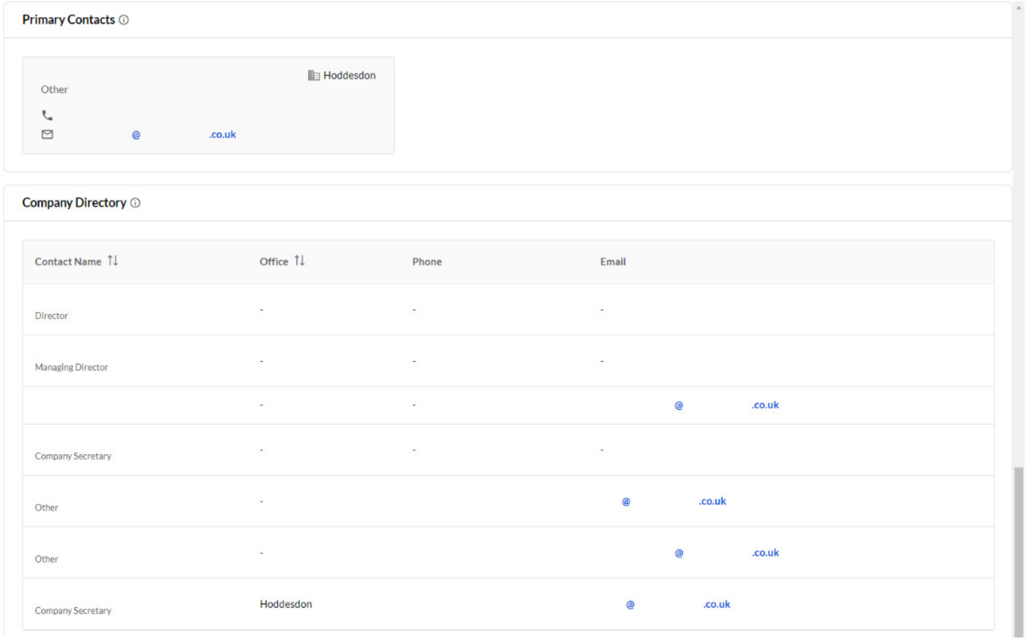
*Please note, to delete a note, the **Manage Supplier Profile Notes Delete** permission must be applied to your user account.*

Please note, **Custom Fields** are currently managed by Once For All. If you require a new custom field, please contact your Buyer Success Manager.

Contacts

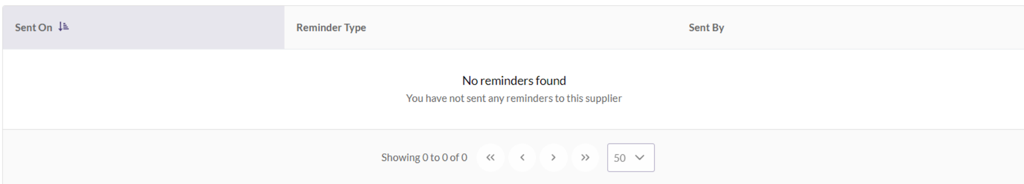
Contacts will display the **Primary** and **Enquiry Contact** for the company.

The **Company Directory** will display the contact information for other important figures within the organisation, such as the Directors, Partners and Owners.



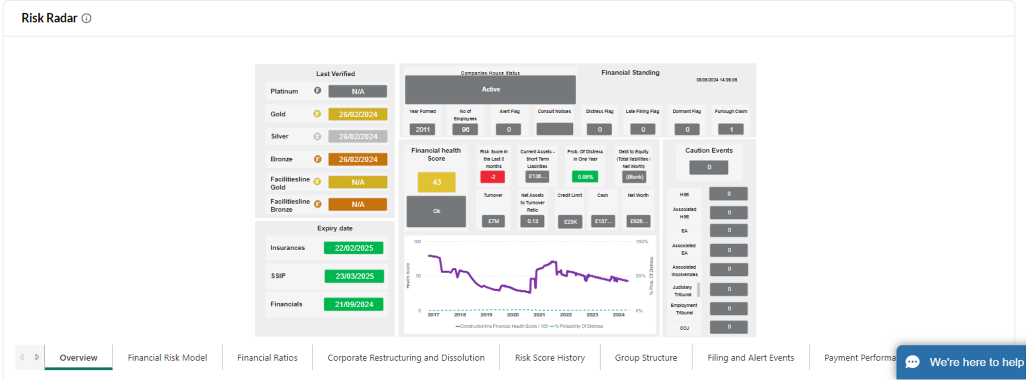
Reminder History

Reminder History will display any reminders you have sent to this organisation. To send a reminder, please navigate to Supply Chain.



Risk Radar

Risk Radar gives you more in-depth information about the supplier, their Financial Health Score, CCJ history, HSE history and Employment Tribunal Data.



Please note, this data will only be viewable if you have **Risk Radar** added to your Success Plan. Please speak to your Buyer Success Manager to find out more.