Explorer Professional
Supplier Locator Guide
Background
Explorer is a sourcing database designed to work the way you do. Track your sourcing projects, find new suppliers, and access the database of 1+ million records from over 300 certifying councils to help you meet your supplier diversity goals.

Account Login
The Explorer supplier locator tool can be accessed at https://explorer.supplier.io. Users can log into Explorer by entering their email address (Username) and then their password provided in an invitation email.

If users are experiencing issues logging in and need to reset their password, they can click on “Forgot Password” on the login page. The system will send an email to the user with a password reset link that will be valid for 48 hours.

If a user enters the incorrect username, they can click on “Sign in with another account” to enter a different username.

Login Pages:
Home Page

Once logged in, users will be taken to the Explorer home page.

1. Clicking on this drop-down menu will present the user with the ability to access their profile and sign-out.

Demo

DemoExplorer@supplier.io

My Profile

Sign Out

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2. This section is a navigation bar that will provide the user with access to other areas of the application.

   Depending on a user’s level of access, the options available on the navigation bar may vary.

3. This section allows the user to filter search results based on specific criteria

   **NOTE:** Filters with numbers next to them signify how many suppliers are available within the specific criteria

4. Type a company name, specific supplier category, DUNS, NAICS number or keyword/s to search for suppliers.

   The **“Entire Database”** option will search supplier.io’s entire database of suppliers.

   The **“My Suppliers”** option will only search suppliers that you currently do business with.
   a. Data enriched suppliers
   b. Registered suppliers
5. Track the status of your suppliers using the dashboard on the home page.

The dashboard highlights suppliers with expiring certifications in the next months and suppliers that will lose their certifications in each category.
User Profile
The user profile will contain three sections: Login Information, Personal Information, and Email Subscriptions.

Login Information:
- Email: This is the email address and username associated with the user logged into the system.
- Change Password: If checked, will present the user with a form where they can update their current password to log in.

Personal Information: A user can update their name and title in this section.

Email Subscriptions (See appendix for examples):
- Monthly Supplier Diversity Dashboard – Emails metrics from the dashboard that is visible on the home screen.
- Updates on my suppliers – Monthly email that includes list of followed suppliers where their last accepted certification has expired.
- Monthly Usage Stats – Monthly report that includes stats such as: searches conducted, suppliers and commodities viewed, reports viewed, evaluations completed.

NOTE: The “Monthly Supplier Diversity Dashboard” and “Updates on my suppliers” will be consolidated into a single email if both subscriptions are selected.
Search Results

Explorer provides different types of auto-complete search results depending on the keyword used:
Search by Supplier Name [1], Products & Services [2], Supplier Commodities [3], and All results [4].

Supplier Name:
- Search through the suppliers in our database strictly based on the supplier’s name containing a portion of the search keyword used.

Products & Services:
- Search through the suppliers registered in our database based on their products & services offered. Only suppliers that have registered through SupplierOne registration will be in the search results given that products & services are only collected through registration.

Supplier Commodities
- Search through suppliers in our database based on their commodities. Commodities are defined by the NAICS classifications associated with the supplier.

All
- Search through the suppliers in our database based on a combination of all search types.

NOTE: Search type results can be changed after the initial search by selecting the search type:
- All [1], Supplier Name [2], Supplier Commodity [3], Products & Services [4]
Supplier Profile

From the search results, users can select a supplier and open their profile.

The supplier’s details will be organized into different tabs:

- Overview – Intended to provide a high-level view of the supplier, the supplier demographics, products offered, contacts in addition to other information.

- Lists & Activities – Displays any lists that the current user has added the supplier to. Allows user to add supplier to a new or an existing list.

- Certifications – Display certification details related to the supplier’s diversity. Includes self-certification form.

- Commodities & Industries – Displays any NAICS and SIC codes associated with the supplier.

- Similar Companies – Contains list of companies that are similar based on commodities and industries.

- Notes – This is an area where a user can add a shared or private note regarding the supplier. Users can also notify other users that a note has been added regarding the supplier.
Supplier Detail Screenshots:

Overview

Lists & Activities

Certifications
Commodities & Industries

QURIUM SOLUTIONS, INC.
Also does business as: CVM, CVM
dhttps://www.commoditiesandindustries.com

Overview | Lists & Activities | Certifications | Commodities & Industries | Similar Companies | Notes

Commodities
NAICS Classifications
- SOFTWARE PUBLISHERS (512190)
- DATA PROCESSING, HOSTING, AND RELATED SERVICES (512210)
- OTHER COMPUTER RELATED SERVICES (517110)
- ADMINISTRATIVE MANAGEMENT AND GENERAL MANAGEMENT CONSULTING SERVICES (541390)

Industries
SIC Classifications
- DATA PROCESSING AND PREPARATION (7374)

Similar Companies

QURIUM SOLUTIONS, INC.
Also does business as: CVM, CVM
dhttps://www.commoditiesandindustries.com

Overview | Lists & Activities | Certifications | Commodities & Industries | Similar Companies | Notes

Similar Companies

Notes

QURIUM SOLUTIONS, INC.
Also does business as: CVM, CVM
dhttps://www.commoditiesandindustries.com

Overview | Lists & Activities | Certifications | Commodities & Industries | Similar Companies | Notes

0 comment(s)  privé Add Comment

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Supplier Actions

When viewing a supplier, action buttons will be available to the current user.

Share

The share option can be used to share a supplier profile through the Explorer tool to another user, or by email.

Follow

Click on the follow button (Heart icon) to receive monthly updates regarding the supplier if their last accepted certification has expired.

**NOTE:** User must be subscribed to “Updates on my suppliers” on user profile.

Additional Actions

Other actions include inviting suppliers to register through Supplier.io’s registration portal or update their existing information, adding notes to the supplier, and refreshing the profile.
Editing

Edit icons (✏️) will appear throughout the supplier details pages. Users can edit information about a supplier wherever these icons are available.

**NOTE:** Any time there is an edit made to a supplier profile, the supplier will return to the approval queue.
Lists

Explorer provides users with the ability to build lists of suppliers. Suppliers can be added manually to lists and saved searches can be created to build a list of suppliers based on search criteria.

Adding Suppliers to Lists

Once presented with search results, users can tick a checkbox [1], next to the supplier, and then click the button “Add to List” [2].

Users can type the name of a new list and click [TAB] to create a new list, or users can click the drop-down to select an existing list to add the selected suppliers to [3].

Once the list has been selected, the user can click the “Add” button [4].

NOTE: Suppliers can be added to multiple lists at the same time.

Creating a Saved Search

When filters are set on a supplier search, a user can save those search filters by clicking “Save Search” [1].

A menu will pop up where a user can type a name of a new list (Saved Search List) or apply the search filters to an existing list [2].

Once the saved search list is selected, the user can click the “Save” button [3].
Viewing Lists

To view existing lists, select “Lists” from the navigation bar.

Lists are broken down into three categories:

- My Lists
- Supplier Lists
- Saved Search

My Lists contains manual lists that Explorer users create and add suppliers to.

Actions:
- View allows users to view the suppliers in Explorer search results.
- Download allows users to download the list of suppliers.
- Share allows users to share the list with other Explorer users.
- Delete allows users to remove a list.

Supplier Lists are system generated lists that are the result of data enrichments.

Actions:
- View allows users to view the suppliers in Explorer search results.
- Download allows users to download the list of suppliers.
- Reports allows the user to view diversity statistics for the suppliers on a dashboard.

NOTE: The downloads and reports of these Supplier Lists will reflect up-to-date data from the database.
Saved Search are lists of suppliers based on saved search filters.

Actions:
- View allows users to view the suppliers in Explorer search results.
- Download allows users to download the list of suppliers.
- Share allows users to share the list with other Explorer users.
- Delete allows users to remove a list.
- Subscribe to Updates – This email is scheduled to be sent out daily and will only consist of new suppliers that have registered that now fall into a saved search filter. (See appendix for example)

Explorer Support
For any technical issues or support that you may need on how to use Explorer, click on the Support button at the bottom of every screen [1].

Type a question or keyword on the search field and the system will give you a list of related articles [2].

If you still require assistance, click on “Contact us” and you will receive a form where you can submit a ticket directly to the Supplier.io Support Team [3].
Appendix – Notification Examples
Monthly Supplier Diversity Dashboard

(Month Name) SUPPLIER DIVERSITY UPDATE

Hi [Contact Name],

Here is the monthly update on your diverse suppliers. This month you have 4 suppliers with expiring certifications. Additionally, 4 have not updated their certifications in more than 12 months, and will no longer be available as diverse suppliers in [Company Name] requirements.

Supplier Expiring:
These suppliers certifications have expired in the past month. Suppliers must renew their certifications within 12 months.

<table>
<thead>
<tr>
<th>MBE</th>
<th>SBE</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>1</td>
</tr>
</tbody>
</table>

No Renewal:
These suppliers have not renewed their certification 12 months after expiration.

<table>
<thead>
<tr>
<th>SBE</th>
<th>VET</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>1</td>
</tr>
</tbody>
</table>

Upcoming Expirations:
These suppliers will lose their certifications in 3 months.

<table>
<thead>
<tr>
<th>MBE</th>
<th>WBE</th>
<th>VET</th>
<th>SMALL</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>

Suppliers at Risk:
These suppliers will be considered diverse if they do not renew their certifications.

<table>
<thead>
<tr>
<th>MBE</th>
<th>MBE</th>
<th>VET</th>
<th>SMALL</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1</td>
<td>7</td>
<td>1</td>
</tr>
</tbody>
</table>

Supplier Updates:
Status changes for suppliers you follow.

There are updates for additional suppliers that you follow. View the complete report for details.

View Complete Report

This report uses metrics from suppliers based on your preferences set in your profile. If you would like to customize the report, change the filters in your account at [Supplier.io].

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Updates on my suppliers