supplier.io

Explorer Professional

Supplier Locator Guide

Contents

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.
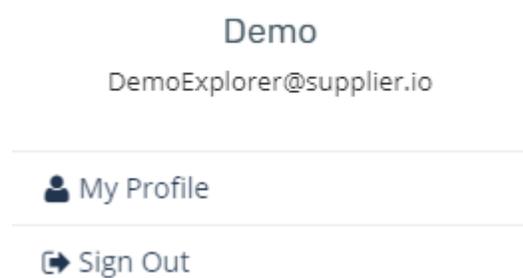
2. This section is a navigation bar that will provide the user with access to other areas of the application.
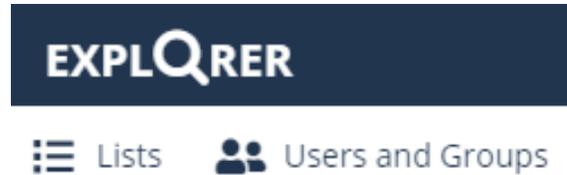
   Depending on a user's level of access, the options available on the navigation bar may vary.

   EXPLQRER

   ≣ Lists   👥 Users and Groups

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

Filter	
👤 ORGANIZATION NAME	⌄
🖻 DESCRIPTION	⌄
👥 EMPLOYEES	⌄
📊 REVENUE	⌄
📍 LOCATION	⌄
🌐 COUNTRY	⌄
🏢 STATE	⌄
≣ INDUSTRIES	⌄
▦ COUNCILS	⌄
💬 DIVERSITY	⌄
👥 RACE / ETHNICITY	⌄
🗁 LISTS	⌄

   ▦ COUNCILS ⌄

   SAM - System for Award Management (122)

   Self Certified (54)

   City of Chicago (35)

   State of Illinois (33)

   Cook County (29)

   Enter Council
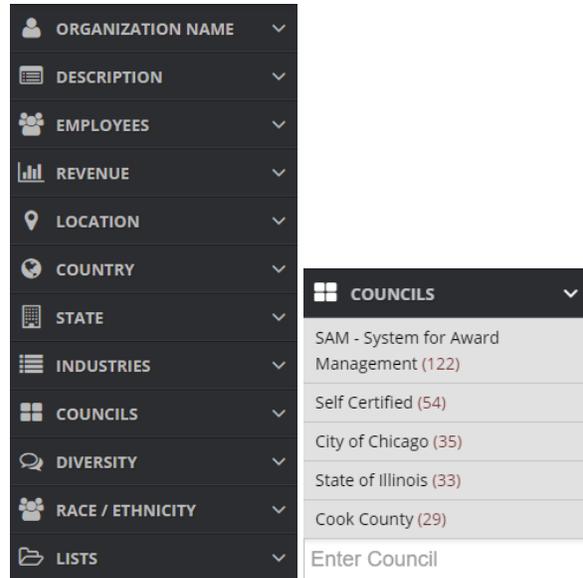
4. Type a company name, specific supplier category, DUNS, NAICS number or keyword/s to search for suppliers.
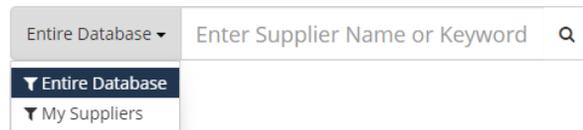
   The "**Entire Database**" option will search supplier.io's entire database of suppliers.

   The "**My Suppliers**" option will only search suppliers that you currently do business with.
   a. Data enriched suppliers
   b. Registered suppliers

   Entire Database ▾   Enter Supplier Name or Keyword   🔍

   ▼ Entire Database
   ▼ My 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.

[This section is intentionally left blank]

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.

[This section is intentionally left blank]

Supplier Detail Screenshots:

Overview

QURIUM SOLUTIONS, INC.
Also does business as: CVM, +05 more

Back to Search Results

Actions ▾

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

Address
4422 N RAVENSWOOD AVE
CHICAGO, ILLINOIS, 60640
UNITED STATES
800-536-6046

Employees	51-200
Revenues	$1M-10M
Established	2011
Organizations Structure	Limited Liability Company
Diversity	MBE, SBE, SC-SDB
Ethnicity	ASIAN AMERICAN

Councils
- Chicago MSDC
- NMSDC
- CPUC - California Public Utilities Commission
- SAM - System for Award Management

SUPPLIER.IO | YOUR ONE SOURCE FOR SUPPLIER DIVERSITY SOLUTIONS

sio

supplier.io - Your one source for supplier diversity solutions and services
supplier.io offers a comprehensive suite of supplier diversity data, software and services to manage and grow a small business and supplier diversity program.

Read this on supplier.io >

Executives

ASHLEE NELSON
Vice President, Sales
ashlee.nelson@supplier.io

NEERAJ SHAH
neeraj.shah@quriumsolutions.com

Description
We provide supplier diversity data and solutions to better manage your supplier diversity program.

Products

Lists & Activities

QURIUM SOLUTIONS, INC.
Also does business as: CVM, +05 more

Back to Search Results

Actions ▾

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

Lists

LISTS

Assign to lists (only visible to you):
Preferred Supplier × | New List ×

Certifications

QURIUM SOLUTIONS, INC.
Also does business as: CVM, +05 more

Back to Search Results

Actions ▾

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

MINORITY-OWNED

SAM - System for Award Management	Valid through Sep, 2021
CPUC - California Public Utilities Commission	View Valid through Jan, 2022
NMSDC	View Valid through Jan, 2022
Chicago MSDC	View Valid through Jan, 2022

SMALL Valid through Apr, 2022

SAM - System for Award Management	Valid through Sep, 2021
Self Certified	Valid through Apr, 2022

SELF CERTIFIED SDB Valid through Sep, 2021

SAM - System for Award Management	Valid through Sep, 2021

⛂ Self-Certification-Form

Proprietary and Confidential

Commodities & Industries

QURIUM SOLUTIONS, INC.
Also does business as: CVM, +05 more

Overview Lists & Activities Certifications Commodities & Industries Similar Companies Notes

Commodities NAICS Classifications ✎

- SOFTWARE PUBLISHERS (511210)
- DATA PROCESSING, HOSTING, AND RELATED SERVICES (518210)
- OTHER COMPUTER RELATED SERVICES (541519)
- ADMINISTRATIVE MANAGEMENT AND GENERAL MANAGEMENT CONSULTING SERVICES (541611)

Industries SIC Classifications ✎

- DATA PROCESSING AND PREPARATION (7374)

Similar Companies

QURIUM SOLUTIONS, INC.
Also does business as: CVM, +05 more

Overview Lists & Activities Certifications Commodities & Industries Similar Companies Notes

Similar Companies

DBE MBE WBE DISABLED SBE

DBE MBE DISABLED SBE SDVET VET

SBE

Notes

QURIUM SOLUTIONS, INC.
Also does business as: CVM, +05 more

Overview Lists & Activities Certifications Commodities & Industries Similar Companies Notes

0 comment(s)   **0** private   + Add Comment

[This section is intentionally left blank]

Supplier Actions

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

QURIUM SOLUTIONS, INC.
Also does business as: CVM, +05 more

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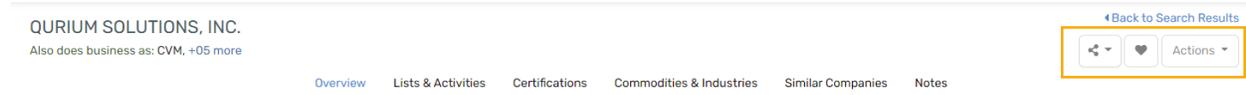
Share

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

☍ Share via SUPPLIER.IO

✉ Share via Email
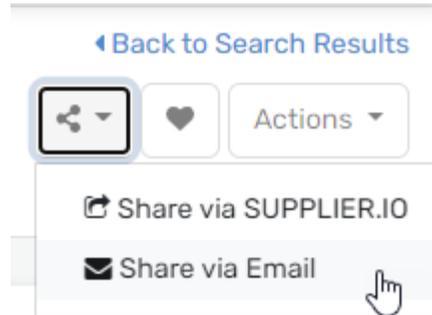
Follow

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.
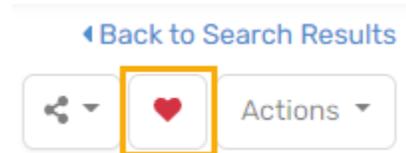
Additional Actions

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.

👤+ Invite

🗒 Add Note

🔄 Refresh Profile
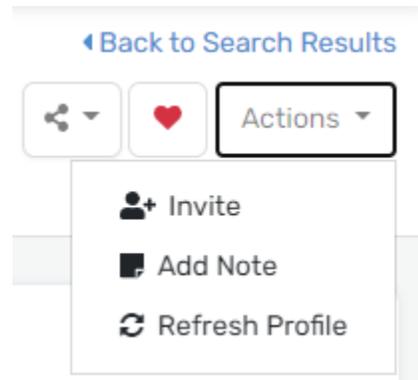
Editing

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.
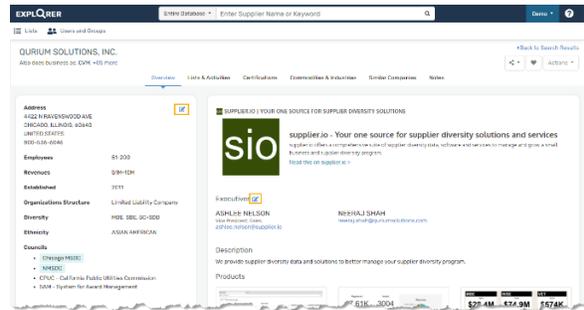
[This section is intentionally left blank]

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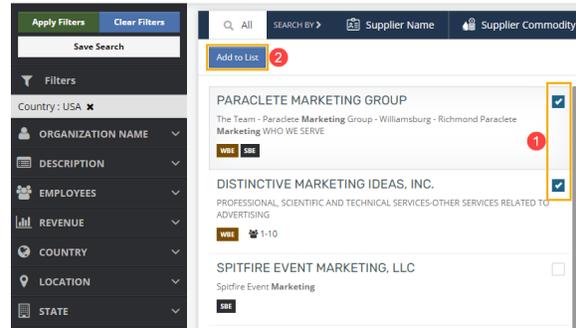
Users can type the name of a new list and click [TAB] to create a new list, or users can click the drop-down to select an existing list to add the selected suppliers to [3].

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].
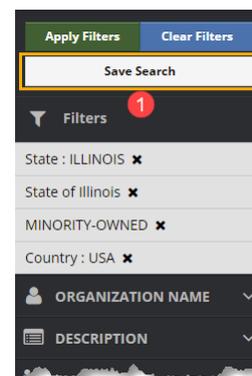
A menu will pop up where a user can type a name of a new list (Saved Search List) or apply the search filters to an existing list [2].
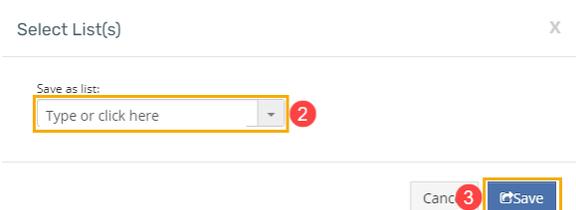
Once the saved search list is selected, the user can click the "Save" button [3].

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 can submit a ticket directly to the Supplier.io Support Team [3].
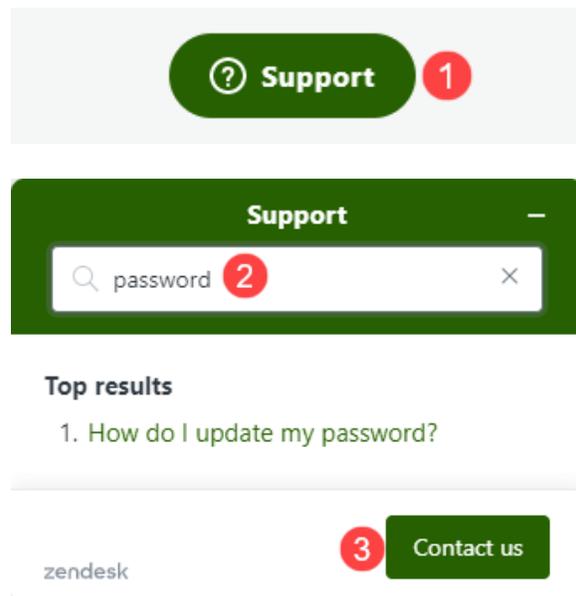
[This section is intentionally left blank]

Appendix – Notification Examples
Monthly Supplier Diversity Dashboard

Updates on my suppliers

supplier.io

{Month Name} SUPPLIER DIVERSITY UPDATE

Hi {Contact Name},

Here is the monthly update on your diverse suppliers. This month you have **46** suppliers with expiring certifications. Additionally, **48** have not updated their certifications in more than 12 months, and will no longer be available as diverse suppliers in Explorer per {Company Name} requirements.

Supplier Expirations
These suppliers' certifications have expired in the past month.
Suppliers must renew their certifications within 12 month.
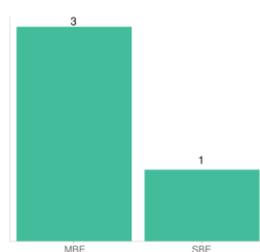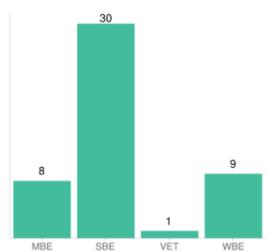
No Renewals
These suppliers have not renewed their certification 12 months after expiration
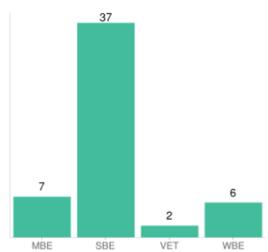
Upcoming Expirations
These suppliers have will lose their certifications in 3 months

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

Suppliers Updates
Status changes for suppliers you follow

{Supplier Name} **DBE Expired.** The company's last accepted certification has expired and the supplier has not renewed their certification.

{Supplier Name} **MBE Expired.** The company's last accepted certification has expired and the supplier has not renewed their certification.

{Supplier Name} **MBE Expired.** The company's last accepted certification has expired and the supplier has not renewed their certification.

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

View Complete Report

This email was sent from supplier.io based on the preferences set in your profile. If you would like to unsubscribe from this email, change the settings for your account on Explorer.

Monthly Usage Stats

Subscribe to Updates (Saved Search)