Working with your Suppliers' Document Requirements

Wholesalers and Retailers can use this quick reference to designate the documents required from their partners, set audit values and expiration days, and set the timing for partner compliance alerts.

Logging in

1. Go to www.repositrak.com and click **Login**.
2. Log in with your **Username** (usually your email address) and **Password**.

About the Tabs

Compliance Center. Your landing page, providing an overview your Supplier statistics, Supplier signups, news feeds and quick links.

My Company. Update your Business Profile and Contacts for report Notifications.

My Partners. Assign Partner IDs and categories, invite additional suppliers to join your ReposiTrak initiative, view Supplier Contacts.

Manage Documents. Set up requirements for your partners, monitor compliance and search for specific content.

Track & Trace. Manage item and production run information, trace batch/lot movement and usage.

Set up your Document Requirements

Use this task to select and define the documents you require to be current and loaded by your partners into ReposiTrak.

The steps use **Document Types** and **Attributes** to determine which partners receive the requirement.

Document Types

Corporate. Documents general to a business relationship.

Facility. Documents for locations, such as manufacturing, processing or shipping facilities and distribution centers.

Product. Documents for specific product types, such as dairy, seafood, or produce.

Business Attributes

During implementation, each supplier sets up attributes that describe their role within the supply chain. For example, Grower, Produce, Domestic.

Because you likely have many partners, assigning document requirements by Attributes eliminates the need to set up each partner individually.

Audit Attributes

Some requirements can include attributes such as minimum and maximum values. For example, you can require liability coverage between $2,000,000 and $4,000,000.

If pre-configured for the Document Type by Support, the steps include entering your required audit values.

Display or Update your Requirements:

1. Under *Manage Documents* > *Setup/Manage*, click **Documents I Require**.
2. To narrow the list, select a **Document** or **Attribute** and click **Find**.
3. To view details or update a requirement, click the document's **Action** menu.

Add a Document Requirement:

1. Click **Add Document Requirements**.
2. Select the **Document Type**.
3. Select the **Attributes** that describe the partners to whom the requirement applies. Only partners matching <u>all</u> attributes selected receive the requirement.
4. Select the **Available Document** from the drop-down. (Default Expiration Days appear in parenthesis.)
5. Select whether the Document **Is Required**. If unchecked, this will appear in the partner's list as optional.
6. Enter the **Nbr. of Expiration Days**. Leave blank if the document does not expire.
7. Click **Select**.
8. Select other **Available Documents** that should apply to the attributes as needed.
9. Click **Save**.

To add Audit Attributes such as minimum liability, **Save** the current requirement and then click the document's **Action** menu to update.

See *Documents I Require* in the Online Help for more information.

Manage Partner Compliance Alerts

ReposiTrak performs weekly compliance reporting, reviewing repositories for missing documents, documents expired or about to expire, and documents that do not meet audit requirements.

If found, e-mail notifications go to the partner's contacts and to the designated contacts on your team. Use this option to set the timing for each document alert.

1. Under *Manage Documents*, click **Documents I Require**.
2. Locate the document and select **Update** from its **Action** menu.
3. Click **Manage Partner Alerts**.
4. Adjust the number of days in the **Value** column for each option as desired. Click **OK**.

   For example, notify the partner about missing documents every 30 days.
5. Use **Manage My Notifications** to set the timing for copies sent to your contacts.

Manage Document Notification Contacts

Each side of a partnership sets up contacts to receive notifications for their business. To be selected, contacts must have ReposiTrak usernames.

The contacts you designate here will receive:

- Alerts about documents you require from your partners.
- Alerts concerning documents your partners may require from you.

1. Under *My Company > Setup/Manage*, click **My Contacts for Notification.**
2. Select the **Contact Type**.

   Referential Document Notification. Receives compliance and other reports.

   New Vendor Enrollment Notification. Receives notice when a new supplier signs up to meet your document requirements.
3. Optionally enter search criteria and click **Find** to display your ReposiTrak users.

   Primary Contact. Receives notifications and, if the document owner, appears in notification reports as the contact for questions.

   Non Primary Contact. Receives notifications, but does not appear as a contact in notification reports.

   Not a Contact. Does not receive notifications and does not appear as a contact in notification reports.
4. Use the drop-downs to adjust your contacts.
5. Click **Save**.

Document Content Search

Use this tool to search for partner documents containing specific text. For example, words specific to products or product ingredients, such as "tomato" or "nitrogen fertilizer," or for location-related details such as "China" or "warehouse."

1. Under *Manage Documents* > *Search*, click **Partner Documents for a Word, Phrase or Value**.
2. Select a specific **Document** type or search in All documents.
3. Enter the **Containing Text** upon which to search, such as *tomato*.

   Use asterisks * as wild cards for partial text searches. For example,**inspec*.*

   Use quotes " " to search for phrases. For example, *"sodium content"*.

   Use capital letters OR to search for documents containing either of two or more words. For example, search for documents containing *health OR inspection*.

   Use capital letters AND to search for documents containing all of two or more words. For example, search for documents containing both *nitrogen AND fertilizer*.
4. Optionally select an **In Effect On** date to only search for documents that were current on a certain date.
5. Leave **Latest Versions Only** selected to search the most recent document versions. Uncheck to search in all versions.
6. Click **Find**. Documents containing the text display.
7. Click the **Document** to open or save.

Review Document Compliance

Use this "compliance check" to ensure your partners are meeting your document requirements. Note that the option name will vary based on your role.

1. Under *Manage Documents > Search*, click **Customer** or **Supplier Document Compliance**.
2. Use the **Customer** or **Supplier** filter to choose which partner's requirements to display.
3. Optionally select a **Document**.
4. Results display onscreen.

Columns

Document. Click the name to view or save a copy.

Partner. Document owner (Supplier or Customer).

Status. Whether the document meets requirements. For example:

> **Compliant** - Document is loaded and compliant.
>
> **Missing** - Document is not loaded.
>
> **Pending Review** - If you require a manual review to be performed by your team, this Status displays until the review is complete. Pending includes the automated results such as Compliant or Specs not met.
>
> **Expired** or **To Expire** - Document has expired or will expire will expire within 7 days.
>
> **Specs not met** - Contents do not meet specifications. For example, below minimum coverage amounts.
>
> **Not in effect** - Document is loaded, but the effective date is in the future. No current "in effect" version is present.
>
> **Access not granted** - Owner revoked requester access to the document.

Effective Period. Date range for which document is valid based on the document's effective date and the number of expiration days set by the document requester.

Actions

View Attributes. Click to view values, such as liability amounts. Values that do not meet requirements highlight pink.

View Document History. View all versions uploaded for a document. Click a Version number to open.

View Note and Reason. View notes added by the Owner about a document and its status.

Why is it Listed? Lists the "traits" selected when setting up the document requirement.

Partner Contact Info. View your partner's notification contacts for questions regarding the document.

Need Assistance or have a Comment?

ReposiTrak Support is available to assist you.

ReposiTrak Support

> **E-mail:** Support@ReposiTrak.com
>
> **Live Chat:** Login to ReposiTrak and chat with an agent. Chat is available during our standard Support hours.
>
> **Telephone:** 1.888.327.6187
>
> **Contact Support:** Login to ReposiTrak and click this link from any screen. Fill out the short form and click Submit. We will respond to your inquiry as soon as possible.

Standard Support hours: 7:30am – 5:30pm CT

Monday through Friday (except major holidays)