felix

Settings and Security

Felix User Guide

TABLE OF CONTENTS

INTRODUCTION

This user guide provides an understanding of the Settings tab. It also explains the functionalities that each option does and the step-by-step process on how to use them in Felix.

SETTINGS TAB

The Settings tab contains multiple options you can do as an administrator. Below are the following options and what each of these options does:

General

- Organisation Details - Information about the organisation such as organisation title, address, suburb/state/postcode, email, phone, website, and locations are found here.
- Terms & Conditions - This section is where the Terms & Conditions document is uploaded.
- Logos - The Site logo as well as the RFQ logo image are uploaded here.
- Panels Rates Open and Close Date - You can send notifications on panels rates and set the duration of the notification in this section.

Organisation Dashboard

This is where you can edit the dashboard title and the content.

User Management

This setting allows you to add new users or delete users. You can see the status of users as well whether they are active or inactive.

Teams Management

This setting allows you to add, edit or delete teams. You can see how many team members a specific team has and add a team member to a specific team.

Panel Management

This setting allows you to add or edit a panel. You can see the panel details here.

Vendor Settings

- Manage Tags - You can add, edit or delete tags.
- Compliance Document Management - The following are the options when managing compliance documents:
  - Automatically suspend vendors which have expired insurances or licenses
  - Send notification to vendors prior to license expiry and set the duration of the notification
  - Send notification to vendors when license expires and set the duration of the notification
  - Notify when a vendor adds, archives or replaces a compliance document

- Notifications - You can send notifications to a specific email address when new application submissions are received, when unlocking request email or when compliance sign-off is complete.
- External ID Types – Use external id types to link your vendors with other external platforms for easy reference.

RFQ Settings

- Manage Document Groups – You can add document groups and have them appear as default or selectable from the dropdown on the Documents page during RFQ creation for better organisation.
- Manage Requested Document Types - You can add requested documents that vendors need to submit and have them appear as default or selectable from the dropdown on the Documents page during RFQ creation for better organisation.
- Other Settings - The following are the options in this section:
  - Vendor matching limit - Set a limited number of vendors that matches your RFQ.
  - Automatically email the creator each time an individual quote response is received
  - Allow users to create their own document groups during RFQ creation
  - Allow users to create their own requested document types during RFQ creation
  - Apply panel category restrictions to RFQ category selector
  - Enable Budget Details section for RFQ
  - RFQ close time - Set the closing time for an RFQ.

Compliance Document Settings

This setting allows you to add panel rules, category rules or questionnaire response rules to ensure your vendors are only prompted to upload relevant compliance documents as they onboard.

Document Settings

This setting allows you to receive notifications when specific document types are expired or nearing expiry.

Security Groups

This setting allows you to control the features and information that users interact with when using Felix. You can manage permissions for each security group to allow them to perform certain actions within the platform.

Single Sign-On

Single Sign-On or SSO allows users to log in to Felix using their single set of corporate credentials when enabled.

Integration

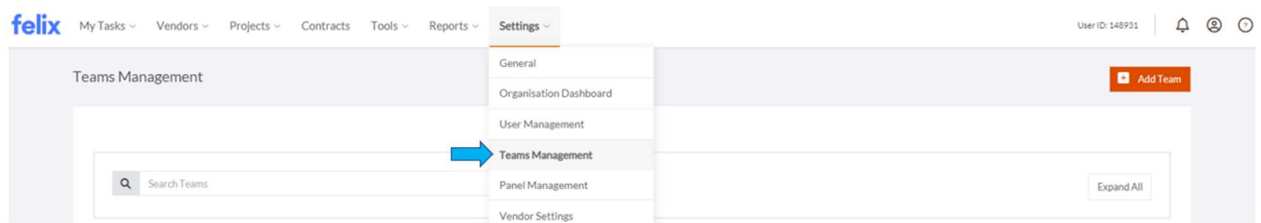This is where you can set up third party integrations and API Tokens.

ADDING USERS TO TEAMS

Adding a user to a team helps you organise your users in Felix.

Adding a user to a team via the Teams Management Setting
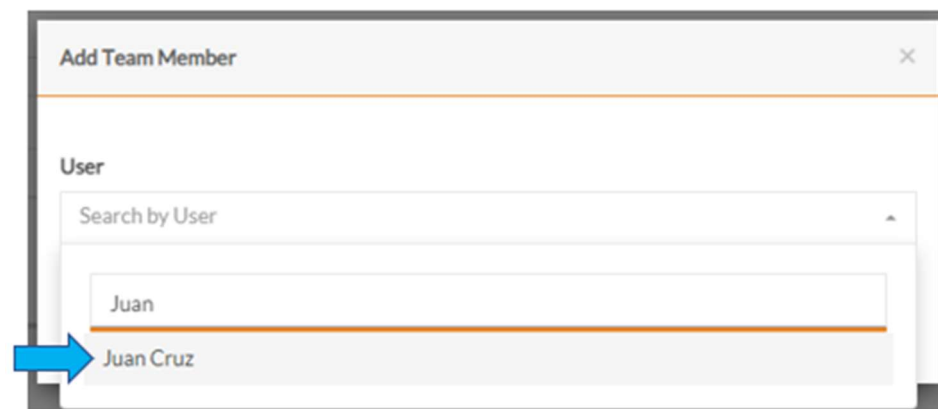
To add a user to a team:

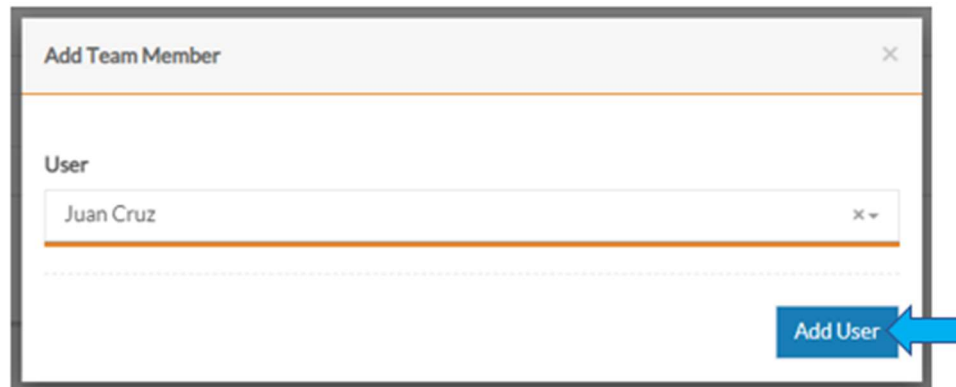1. Navigate to **Settings > Teams Management** from your Felix dashboard.

2. Locate the team you wish to add a user to or enter the team's name in the search bar if it is an existing team.
3. Hover over the **ellipsis icon** beside the relevant team.
4. Select **Add Team Member** from the dropdown menu.

5. Enter the user's name in the field provided.
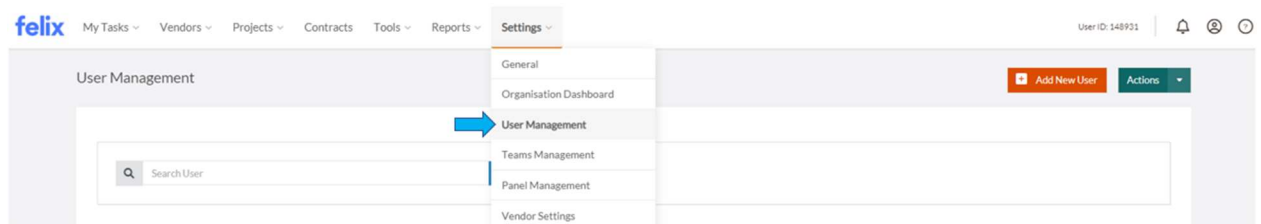6. Select the appropriate user from the dropdown menu.

7. Click the **Add User** button.

Adding a user to a team via the User Management Setting

To add a user to a team:

1. Navigate to **Settings > User Management** from your Felix dashboard.

2. Locate the user you want to add to a team or enter the user's name in the search bar if it is an existing user.
3. Hover over the ellipsis icon right after the Status field and select **View Details**.

Name	Email	Phone	Security Group	Status	
Brad Pitt	bpitt@felix.net	4875944468	Administrator	Active	...
James Flinch	jflinch@felix.net	1147896554	Administrator	Active	✎ View Details
Juan Cruz	jcruz@felix.net	9784563187	Administrator	Active	🗑 Delete
Pepe Smith	psmith@felix.net	4587744959	Administrator	Active	...

4. In the **Teams** field, click the **Select Team** dropdown and select the preferred team.
5. Click the **Assign** button.

6. Click the **Update** button.

Notes:

- If the team is not existing, create one using the Quick Add button.
- A user can be added to multiple teams.

UPDATING THE ORGANISATION DASHBOARD

Your organisation's dashboard is the first page staff users will see when logging in to Felix. You can customise your dashboard to include important messages and links that you wish to be visible to your staff users.

Note: Your organisation dashboard is only visible to staff users and will not be visible to your vendors.

To update the Organisation Dashboard:
1. Navigate to **Settings > Organisation Dashboard**.
2. Enter a title in the field provided.
3. Use the **Dashboard Content** field to enter any text and/or links that you wish to be visible to staff users.
4. Click the **Update** button.

MANAGING DOCUMENT GROUPS

A document group is a way to organise and categorise documents that you may send to your vendors as part of an RFQ. When a vendor receives an RFQ, they will be able to view the grouping of documents and download them as folders or individually.

Adding a new document group

To add a new document group:

1. Navigate to **Settings > RFQ Settings** from the main menu.
2. Go to the **Manage Document Groups** section.
3. Click the **Add Group** button at the top right of the section.

4. Enter a name for the document group in the field provided.
5. Click the **Save** button.

Changing a document group's availability

To change a document group's availability:
1. Navigate to **Settings > RFQ Settings** from the main menu.
2. Go to the **Manage Document Groups** section.
3. **Drag and drop** the document group from the **Unselected** section to the **Default** section or **Selected** section.

Deleting a document group

To delete a document group:
1. Navigate to **Settings > RFQ Settings** from the main menu.
2. Go to the **Manage Document Groups** section.
3. Locate the document group you wish to delete and drag and drop it into the **Unselected** section.
4. Click the **trash bin icon** that appears next to the name of the document group.
5. Click the **Yes** button to confirm the deletion.

Note: System document groups may not be deleted by users. Document groups which are actively in use by live RFQs also cannot be deleted to prevent the loss of data.

Allowing users to create document groups

To allow users to create new document groups during RFQ creation:

1. Navigate to **Settings > RFQ Settings** from the main menu.
2. Go to the **Other Settings** section.
3. Click the **Allow users to create their own document groups during RFQ creation** checkbox.
4. Click the **Update** button.

Tip: When a new document group is created by a user during RFQ creation, it will be classified as an **Unselected** availability type.

MANAGING COMPLIANCE DOCUMENT RULES

To ensure that your vendors are only prompted to upload *relevant* compliance documents as they onboard for specific panels, add specific service categories or provide responses to your questionnaire, your organisation may use the **Compliance Document Rules** feature.

Adding a compliance document panel rule

To add a new compliance document panel rule:

1. Navigate to **Settings > Compliance Document Settings** from the main menu.
2. Click the **Actions** button at the top right corner.
3. Select **Add Panel Rule** from the dropdown menu.
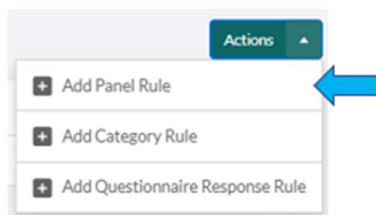
4. Click the dropdown to select the **panel** that the rule will apply to.

5. Update each compliance document type whether the document is **Mandatory, Optional** or **Off** for the panel.

6. Click the **Save Rule** button.

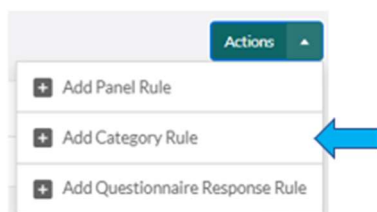|	
ElXXXXXXXXXXXXXXXXXXXXXXXXXce	Mandatory ⌄
HiXXXXXXXXXXXXXXXXXXXXXce	Optional ⌄
PlXXXXXXXXXXXXXXXXXXXXXXce	Off ⌄
PrXXXXXXXXXXXXXXXXXXXXXXXXXXce	Mandatory ⌄
PuXXXXXXXXXXXXXXXXXXXXXce	Optional ⌄
QBXXXXXXXce	Off ⌄
WoXXXXXXXXXXXXXXXXnd	Mandatory ⌄

Save Rule

Tip: If no panels are available for selection, existing rules already apply to each panel.

Adding a compliance document service category rule

To add a new compliance document category rule:

1. Navigate to **Settings > Compliance Document Settings** from the main menu.
2. Click the **Actions** button at the top right corner.
3. Select **Add Category Rule** from the dropdown menu.

Actions ▲
- ➕ Add Panel Rule
- ➕ Add Category Rule ⬅
- ➕ Add Questionnaire Response Rule

4. Enter 3 or more characters in the field to search the relevant category or enter the category name in the field provided.

5. Select the appropriate **category** from the dropdown menu.
6. Update each compliance document type whether the document is **Mandatory, Optional** or **Off**.
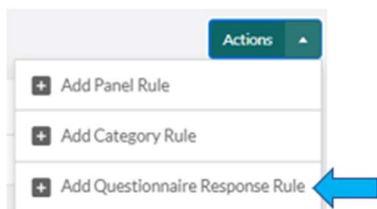7. Click the **Save Rule** button.

Adding a compliance document questionnaire response rule

To add a new compliance document questionnaire response rule:

1. Navigate to **Settings > Compliance Document Settings** from the main menu.
2. Click the **Actions** button at the top right corner.

3. Select **Add Questionnaire Response Rule** from the dropdown menu.

4. Select the appropriate **section** of the questionnaire that the rule will apply to.
5. Select the **question** from the chosen section of the questionnaire that the rule will apply to.
6. Select the **response** that the rule will apply to.
7. Update each compliance document type whether the document is **Mandatory, Optional** or **Off**.
8. Click the **Save Rule** button.

Note: If a vendor matches the parameters of more than one rule, the stronger rule will apply. For example, a *mandatory* rule will override an *optional* rule, and an *optional* rule will override an *off* rule.

ADDING A NEW DOCUMENT TYPE FOR VENDOR DOCUMENTS

The **Documents** tab in the vendor profile allows you to manage internal documents pertaining to the vendor.

Note: The document types that you are able to add to this section are subject to custom configuration. If you would like to add a new type of document, get in touch with the Support team at help@felix.net.

To add a new document type:
1. In **Documents** tab, click the **Add new document** button at the top right corner.
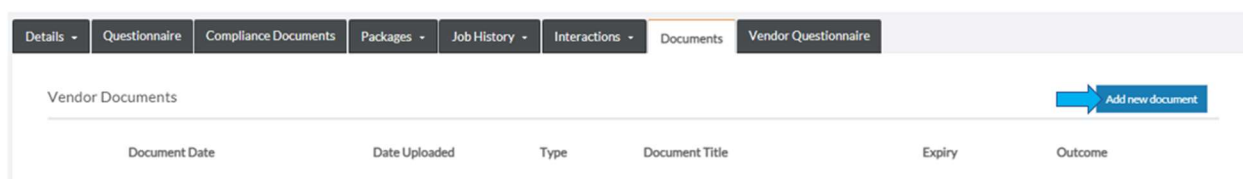
2. Select the **Document Type** that you would like to add from the dropdown.

3. Update the required fields.
4. (Optional) Enter any comments in the text box provided.
5. Click the **Save Document** button.

MANAGING SECURITY GROUPS

Security groups offer a fine level of control over the features and information users interact with when using Felix.

The features available within Felix can be restricted based on the permissions they require. Permissions are granted separately for each security group to allow users to perform certain actions within the platform.

Tip: Staff users can belong to more than one security group simultaneously. This can be useful for granting temporary permissions to a specific user or where users require the intermittent elevation of permissions.

Creating a security group
To create a security group:
1. Navigate to **Settings > Security Groups** from the main menu.

2. Click the **Add New Group** button at the top right corner.
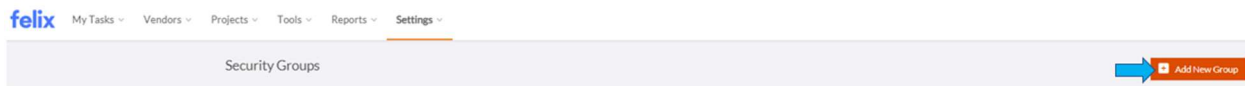
3. Enter a **Title** for the security group in the field provided.
4. In the Permissions section, click the checkboxes that you wish to grant the group.

5. Click the **Save Group** button.

Editing a security group

To edit a security group:
1. Navigate to **Settings > Security Groups** from the main menu.
2. Locate the security group that you would like to edit.

3. Hover over the **ellipsis icon** and select **Edit** from the options.

4. Make the necessary changes.
5. Click the **Save Group** button.

Deleting a security group

To delete an existing security group:
1. Navigate to **Settings > Security Groups** from the main menu.
2. Locate the security group that you would like to delete.
3. Hover over the **ellipsis icon** and select **Delete** from the options.

4. Click the **Delete** button to confirm the deletion.

Global security group permissions

Felix provides three out-of-the-box global security groups available to every organisation using Felix. These roles can't be edited and provide a base permissions structure.

The tables below provide an overview of default user permissions, divided into the different modules and the functions that can be performed using the platform. Your permissions are subject to custom configurations and could therefore differ to the below.

Vendor management permissions

Function	Administrator	Standard User	View Only
Vendors Listing			
Invite a new vendor	●		
Export vendor listing (.csv)	●	●	●
Access vendors profile (Invited - Pending Approval)	●	●	

Function	Administrator	Standard User	View Only
Access vendors profile (Approved - Suspended)	✔	✔	✔
Suspend/Un-suspend a vendor	✔		
Evaluate a vendor (requires the Evaluation feature to be enabled for the account)	✔	✔	
Vendor Profile			
Approve/decline a vendor	✔		
View vendor tags	✔	✔	✔
Assign vendor tags	✔		
View vendor summary	✔	✔	✔
Update vendor summary	✔		
View vendor company details	✔	✔	✔
View additional contacts	✔	✔	✔
View panel memberships	✔	✔	✔
Update panel memberships	✔		
View payment details (requires the Payment Details feature to be enabled for the account)	✔		
Validate payment details (requires the Payment Details feature to be enabled for the account)	✔		
View questionnaire responses	✔	✔	✔
Download attachments to questionnaire responses	✔	✔	✔
Add sign-off assignments (requires the Compliance Sign-Off feature to be enabled for the account)	✔		
Complete sign-off assigned to the user (requires the Compliance Sign-Off feature to be enabled for the account)	✔	✔	
Overwrite sign-off status (requires the Compliance Sign-Off feature to be enabled for the account)	✔		

Function	Administrator	Standard User	View Only
Add comments to sign-off (requires the Compliance Sign-Off feature to be enabled for the account)	✓	**Condition:** Only when a sign-off is assigned to the user.	
View sign-off status (requires the Compliance Sign-Off feature to be enabled for the account)	✓	**Condition:** Only when a sign-off is assigned to the user.	
View compliance documents	✓	✓	✓
Download compliance documents	✓	✓	✓
Validate compliance documents	✓		
View full service listing	✓	✓	✓
Download full service list data	✓	✓	✓
View pending rates (requires the Standard Rates feature to be switched on in settings)	✓	✓	✓
Approve/decline standard rates (requires the Standard Rates feature to be switched on in settings)	✓		
View approved rates (requires the Standard Rates feature to be switched on in settings)	✓	✓	✓
View vendor experience (requires the Vendor Experience feature to be enabled for the account)	✓	✓	✓
View interactions	✓	✓	✓
View internal documents	✓	✓	✓
Add internal documents	✓		
Unlock a vendor	✓		
Download vendor summary report	✓	✓	✓
Download all documents within vendor profile	✓	✓	✓

Sourcing permissions

Function	Administrator	Standard User	View Only
Browse Panel			
Search categories	✓	✓	✓
View vendor contact details	✓	✓	✓

Function	Administrator	Standard User	View Only
Engage [1]	✓	✓	✓
Project Groups and RFQ Listing			
View project groups listing	✓	Subject to Project Group permissions	Subject to Project Group permissions
Add project groups	✓	✓	
View RFQ listing	✓	Subject to Project Group permissions	Subject to Project Group permissions
Add & Send RFQ	✓	Subject to Project Group permissions	Subject to Project Group permissions; can create & save, cannot send
Archive/Unarchive RFQ	✓		
View RFQ details	✓	Subject to Project Group permissions	Subject to Project Group permissions
Delete a saved RFQ	Only self-created RFQ	Only self-created RFQ	Only self-created RFQ
View the list of all engagements [2]	✓	Only self-created	
Live RFQ actions			
Close/re-open an RFQ	✓	Subject to Project Group permissions	
Update job close date/service close date for any RFQ	✓		
Update job close date/service close date for self created RFQ	✓	Subject to Project Group permissions	
Amend job details settings (Quote Update/Notifications)	✓	Subject to Project Group permissions	
View communications	✓	Subject to Project Group permissions	Subject to Project Group permissions
Respond to RFI	✓	Subject to Project Group permissions	
Send new communications (addendum/notice to tenderers)	✓	Subject to Project Group permissions	
View notes	✓	Subject to Project Group permissions	Subject to Project Group permissions
Add notes	✓	Subject to Project Group permissions	

Function	Administrator	Standard User	View Only
Download quotes	✔	Subject to Project Group permissions	Subject to Project Group permissions
Print RFQ details	✔	Subject to Project Group permissions	Subject to Project Group permissions
Add new services	✔	Subject to Project Group permissions	
Invite vendor to an RFQ	✔	Subject to Project Group permissions	
Send reminders on an RFQ	✔	Subject to Project Group permissions	
View result	✔	Subject to Project Group permissions	Subject to Project Group permissions
Enter result	✔	Subject to Project Group permissions	
View engagements [1]	✔	Subject to Project Group permissions	Subject to Project Group permissions
Add and send engagement [1]	✔	Subject to Project Group permissions	
Amend and send a saved RFQ	✔	Subject to Project Group permissions	
Recommend for award [2]	✔	Subject to Project Group permissions	
View recommendations for award [2]	✔	Subject to Project Group permissions	
Award [2]	✔	Subject to Project Group permissions	
Add an award variation [2]	✔	Subject to Project Group permissions	
Prepare approval workflow [3]	✔	Subject to Project Group permissions	
Approval workflow - approve/decline (when self is assigned) [3]	✔	✔	✔
Approval workflow - edit approvers	✔	✔	
Approval workflow - send RFQ [3]	✔	Subject to Project Group permissions	

Function	Administrator	Standard User	View Only
Approval workflow - send RFQ (where self is not the creator) [3]	✔	Subject to Project Group permissions	

- *1 requires Engagement feature to be configured in the account*
- *2 requires Recommendation for Award feature to be configured in the account*
- *3 requires Approval Workflow feature to be configured in the account*

Other system permissions

Function	Administrator	Standard User	View Only
Tools			
View messages	✔		
Add messages	✔		
Add evaluation template [1]	✔		
Edit evaluation template [1]	✔		
View evaluation assignments [1]	✔		
Add evaluation assignment [1]	✔	Only for self	
Export evaluation assignments as CSV [1]	✔	Only assigned to self	
My Tasks			
View approval instances list [4]	Only where approval is assigned to self or self is the creator	Only where approval is assigned to self or self is the creator	Only where assignment is assigned to self or self is the creator
View the list of sign-offs [3]	Only where assignment is assigned to self	Only where assignment is assigned to self	Only where assignment is assigned to self
View evaluation assignments [1]	Only where assignment is assigned to self	Only where assignment is assigned to self	Only where assignment is assigned to self
Reports			
View Compliance Documents report	✔	✔	✔
Download Compliance Documents report CSV	✔	✔	✔
View Vendor Contact Details report	✔	✔	✔
Download vendor contact details report as CSV	✔	✔	✔

Function	Administrator	Standard User	View Only
View the list of all sign-offs [3]	✓		
Download the list of sign-offs as a CSV [3]	✓	Only assigned to self	Only assigned to self
View approval instances list [4]	✓		
Download approval instances report as a CSV [4]	✓	Only assigned to self	Only assigned to self
Settings			
Manage general settings	✓		
Manage organisation dashboard	✓		
Manage staff members (add/delete)	✓		
Add a team	✓		
Add/delete users to the team	✓		
Edit/update user roles of the team members	✓		
Manage panels	✓		
Manage vendor settings	✓		
Manage RFQ settings	✓		
Manage vendor document settings	✓		
Manage security groups	✓		

- *1 requires Evaluation feature to be configured in the account*
- *2 requires Engagements feature to be configured in the account*
- *3 requires Compliance sign-off feature to be configured in the account*
- *4 requires Approval Workflow feature to be configured in the account*

MANAGING VENDORS

Inviting a new vendor

If you have a specific contact email or new company that you want to invite to Felix, you can invite new vendors at any time. This will create a new vendor profile and link it to your organisation.

To invite a new vendor who is not yet part of the Felix marketplace:
1. Navigate to your **Vendors > View all vendors** from the main menu.
2. Click the **Invite Vendor** button at the top right corner.
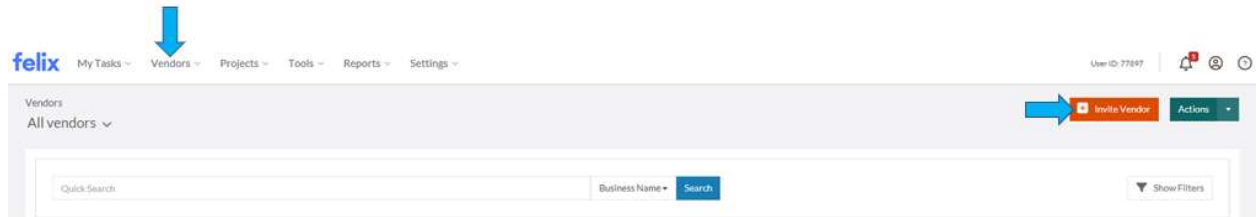
3. Go to **Invite by email** tab.
4. Update the following:
   - **Email -** Enter an email to send the new vendor invite to.
   - **Vendor Business Name** - Enter a suggested vendor business name.
   - **Panel** - Select a panel by clicking the field.
   - **Sign-Off Templates** - Select a template by clicking the field.
   - **Vendor tags**
     - This can be set by the organisation and this field will be visible if the **Add Vendor Tag** is enabled.
     - Select a tag from the dropdown. You can also add a comment by hovering the selected tag and click the **Add Comment** button to enter the comment.
   - **Invite Justification**
     - This can be set as Optional or Required by the organisation. If the **Enforce New Vendor Justification - Comment** is enabled, this field will be required.
     - The Invite Justification text box will be disabled if the **Attach 'New Vendor Justification' file** is enabled.
     - Enter any related vendor invite justification notes or comments.
   - Dropzone link
     - This can be set by the organisation and the dropzone link will be visible if the **Attach 'New Vendor Justification' file** is enabled.
     - The dropzone link will be disabled if the **Enforce New Vendor Justification - Comment** is enabled.
     - Simply click the dropzone link to attach a file.
   - New Vendor Justification Template
     - This can be set by the organisation. A template can be added by the organisation if the **Manage New Vendor Justification Template** is enabled and enabling the **Enforce Justification File** makes the file as mandatory.
     - Navigate to **Settings > Vendor Settings**. Scroll to the bottom and go to **Vendor invite justification template file** section. Click the dropzone link to attach a file and click the **Update** button.
5. Click the **Send Invitation** button.

Notes:

- Zip files are not supported.
- A vendor justification template needs to be added first via the **Vendor Settings**.

Bulk import a list of vendors

If you have an existing list of vendors you'd like to invite into Felix, it can be time consuming to invite them one at a time. Using our bulk import features invite hundreds of vendors at the same time without breaking a sweat.

To bulk import a list of vendors into Felix:

1. Navigate to your **Vendors > View all vendors** from the main menu.
2. Click the **Invite Vendor** button at the top right corner.
3. Go to **Import a list** tab.

4. Download the bulk import template by clicking the **Click here** link.

5. Complete the mandatory **email** and **vendor_title** columns in the template.
6. Click the **Choose File** button to upload the template.
7. Update the following fields:
   - (Required) **Panel** - Click the dropdown to select one or multiple panels.
   - (Optional) **Sign-Off Template** - Click the dropdown to select one or multiple sign-off templates.
8. Review the list of vendors.
9. Click **Send Invitations**.

Note: Each list of vendors imported uses the same panel and sign-off templates. You may need to perform multiple bulk imports depending on your panel & sign-off configuration.

Vendor Tags

To help you manage your vendor base more effectively, each vendor can be assigned with a variety of tags that communicate their unique business attributes. These attributes can include Indigenous Owned, Local Vendors, Social Enterprises, and many others.

Once tags have been applied to a vendor, they will be displayed in the vendor listing and can be used to filter the list by the desired tag. Vendor tags will also be displayed in the Browse Panel, RFQ Quote Details, and in the Approval Forms.

Assigning a vendor tag

To assign a tag to a vendor:
1. Navigate to your **Vendors > View all vendors** from the main menu.
2. Locate the vendor you want to assign a tag by using the quick search or filters.
3. Click on the vendor **Name** or hover over the **ellipsis icon** and select **View Profile** from the options.
4. In **Details** tab, go to **Vendor Tags** section.
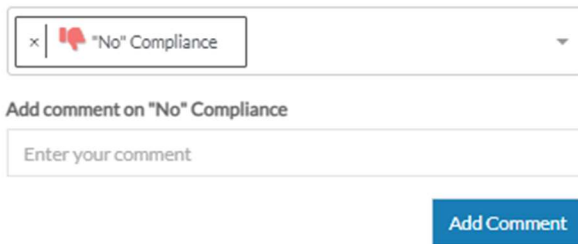5. Click the dropdown to select all tags relevant to the vendor.

Tip: The dropdown menu will display all the tags available for you to use as configured by your Felix Administrator.

Adding comments to a tag

To add a comment to a tag:
1. Navigate to your **Vendors > View all vendors** from the main menu.
2. Locate the vendor you want to add comment to a tag by using the quick search or filters.
3. Click on the vendor **Name** or hover over the **ellipsis icon** and select **View Profile** from the options.
4. In **Details** tab, go to **Vendor Tags** section.
5. Hover over a tag name that has been applied to the vendor until the **Click to add a comment** appears then click on it.
6. Enter a comment in the text box provided.
7. Click the **Add Comment** button.

Vendor Tags

"No" Compliance

Add comment on "No" Compliance

Enter your comment

Add Comment

Tip: When a comment has been added to a tag, it will be displayed when a user hovers over the tag icons for the relevant vendor.

Removing a vendor tag
To remove a tag that has been applied to a vendor:
1. Navigate to your **Vendors > View all vendors** from the main menu.
2. Locate the vendor you want to remove a tag by using the quick search or filters.
3. Click on the vendor **Name** or hover over the **ellipsis icon** and select **View Profile** from the options.
4. In **Details** tab, go to **Vendor Tags** section.
5. Click the **X icon** beside the tag that you would like to remove.

Vendor Tags

"No" Compliance

Vendor Onboarding Overview
When implementing a new vendor management solution, it can be difficult to ensure your vendors are engaged. Creating an effective vendor onboarding game plan will help you to roll out to new vendors efficiently and achieve your goals.

What to expect
It's crucial to establish solid expectations and plan for success when moving to a new system. This often requires dedicated staff resources to provide hands-on management, helping vendors and colleagues through points of friction throughout the process. Planning and establishing internal processes early on will reduce the implementation time and in turn the time it takes to onboard each vendor.

Getting started
Before inviting vendors, it's important to establish the expectations you have of them to onboard. A primer email campaign needs to clearly outline the reasons why the vendor is required to complete their registration and what

they may potentially miss out on if they do not. Staff receiving training and assistance during the initial learning period shows substantial benefit to staff adoption.

- Staff Training
  - o Adopting a new platform can be a daunting experience for new and existing staff. Ensuring your staff has the required knowledge to navigate and use the platform is crucial to early adoption. We have many resources that can be accessed to enhance the knowledge of Felix within your team. If you require any extra dedicated training, do not hesitate to reach out to your Customer Success Manager for further information.

- Primer Email
  - o A primer email campaign directly from the organisation can reduce friction and encourage vendors to onboard. This is most frequently a friendly personalised message outlining why the organisation is using Felix and how it benefits the vendor. We have created a template to help outline the benefits of Felix to the vendor and provide a suggested structure. We suggest including the following:
    - Tailored messaging for your organisation.
    - Explanation of the motivation to use Felix for vendor management.
    - Benefits of vendor onboarding for your organisation using Felix.
    - A date that you would like the vendor to complete the registration.

Inviting vendors

Inviting vendors to the Felix platform is a simple process, however, monitoring the statuses of these invites is important to maximise your onboarding success. The steps below outline our best practises and will help you receive the best results.

- Monitoring Invites
  - o The Vendor screen is your source of truth for managing your vendors. From this screen, you can filter by multiple useful statuses such as:
    - Panel Status (Approved, Declined, Suspended)
    - Vendor Tags
    - Categories
    - Country
    - Progress

- Contact Verification
  - o When inviting a large number of existing vendors to the Felix platform, it is crucial to ensure the contact details you're using are correct. We suggest inviting companies you've recently engaged with or been in touch with. Validating the list of emails you're using will assist in minimizing the number of incorrect invites that are sent. A common challenge that all organisations face is where invitations are not actioned because they are sent to a non-ideal person, **i.e.** an employee of the vendor whose role doesn't concern project work, such as finance, etc. It is very important to identify the correct contact within the business and try to avoid generic emails such as:

- info@xxxx.com.au
- admin@xxxx.com
- remittances@xxxx.com.au
- accounts@xxxx.com.au

Across the finish line

We have seen past success by providing vendors with more incentives to apply. For example, letting vendors know about upcoming projects that will require Felix's approval to apply. Take the "Big Stick" approach, by mandating that POs cannot be raised, contracts signed and/or invoices paid for unregistered vendors. This approach requires planning and caution and is only recommended where extensive engagement is also offered.

- Reviewing vendor submissions
  - o Vendor submissions are best managed from the vendor screen. once a vendor has submitted the application it will lock their account and notify the approvers within the approval workflow if they have been established as default.

- Approving new vendors
  - o Once the vendor has submitted their application you will receive an email notifying you. You can choose to approve or decline the vendor.

    If you would like to customise your email notifications, you can do this by navigating to **Settings > Vendor Settings.**

Measuring success

- What makes a successful onboarding?
  - o Successful onboarding is best measured by the percentage of vendors on-boarded after the initial invite process. It depends on the number of vendors you are inviting and if you have followed the above steps. It is best to discuss your goals with your customer success manager as they will assist you during this process.

Validating Compliance Documents

You can view and validate the **compliance documents** uploaded by vendors as part of their onboarding application. Documents are **pending** until actioned by a member of your organisation.

How to view compliance documents

To view compliance documents:
1. Navigate to your **Vendors > View all vendors** from the main menu.
2. Locate the vendor you want to view the compliance documents by using the quick search or filters.
3. Click on the vendor **Name** or hover over the **ellipsis icon** and select **View Profile** from the options.
4. Go to the **Compliance Documents** tab.
5. Click on an individual document to view further information or hover over the **ellipsis icon** and select **View Details** from the options.

How to validate compliance documents

Notes:

- Once an outcome has been selected, it cannot be changed. Ensure you review **all** details before approving or declining a document.
- Vendors do not see the validation outcome or comments associated with their compliance documents. These are intended for your organisation's reference only.

To approve or decline a compliance document:

1. Navigate to your **Vendors > View all vendors** from the main menu.
2. Locate the vendor you want to validate the compliance documents by using the quick search or filters.
3. Click on the vendor **Name** or hover over the **ellipsis icon** and select **View Profile** from the options.
4. Go to the **Compliance Documents** tab.
5. Click on an individual document that you would like to validate or hover over the **ellipsis icon** and select **View Details** from the options.
6. Click on the appropriate button to **Validate** or **Decline** the document.
7. Enter a comment or reason for the outcome in the **Comments** section.

How to view historical compliance documents

Vendors can update their compliance documents at any time on Felix. When they do so, the existing document and information associated with it are stored in an archive.

To view the historical version of a compliance document:
1. Navigate to your **Vendors > View all vendors** from the main menu.
2. Locate the vendor you want to view the historical compliance documents by using the quick search or filters.
3. Click on the vendor **Name** or hover over the **ellipsis icon** and select **View Profile** from the options.
4. Go to the **Compliance Documents** tab.
5. Locate the relevant document that you would like to view its historical version.
6. Hover over the **ellipsis icon** and select **Show History** from the options.
7. To view the old or replaced version of the document, hover over the **ellipsis icon** and select **Download**.

Tip: Historical versions of a compliance document will show a document status of **Replaced**.

Validating Payment Details

You can view and validate the payment details that have been submitted by a vendor as part of their onboarding application. Payment details are **pending** until actioned by a member of your organisation.

Notes:

- Once an outcome has been selected it cannot be changed. Ensure you review **all** details before approving or declining a vendor's payment details.
- Vendors do not see the validation outcome or comments associated with their payment details. These are intended for your organisation's reference only.

To validate a vendor's payment details:

1. Navigate to your **Vendors > View all vendors** from the main menu.
2. Locate the vendor you want to validate the payment details by using the quick search or filters.
3. Click on the vendor **Name** or hover over the **ellipsis icon** and select **View Profile** from the options.
4. Go to the **Payments** tab and select **Payment Details**.
5. Locate the payment details that you would like to validate.
6. Click on the **Account Name** to view the payment details.
7. Review the payment details.
8. In **Additional Details** section, enter a reason in the **Validation or Decline Reasoning** text box.
9. Click on the appropriate button to **Decline Payment Details** button or **Approve Payment Details** button.

Expiring Vendor Documents Notification

The **Documents** tab within a vendor profile allows you to manage internal documents pertaining to the vendor, such as financial audits or contracts. Felix allows you to receive notifications when specific document types are expired or nearing expiry.

To enable notification of expiring vendor documents:
1. Navigate to **Settings > Document Settings** from your Felix dashboard.
2. Locate the **Document Type** you would like to receive expiry notifications for.
3. Enter a valid **email address** beside the relevant document type.
4. Click the **Update** button.

Document Type	Email within organisation to receive expiry notifications
Worker Induction Form/Certificate	
Pre-employment Medical Form	
Supplier Review Meeting	
Strategic Plan	
Anility FinAssessment Report	

Update

Note: Get in touch with the Support team at help@felix.net if you wish to set up vendor documents for your organisation and/or change configurations for existing documents. This may include changing the notification period, document types, notification recipients and/or document fields.