



Vendor Questionnaires

Felix User Guide

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INTRODUCTION

This user guide provides clarification on the distinctions between Compliance questionnaires and Vendor Questionnaires, and provides instructions on how to send, monitor, and manage these questionnaires.

VENDOR ONBOARDING QUESTIONNAIRES

Felix includes a questionnaire type known as a compliance or vendor onboarding questionnaire; which are mandatory questionnaires that new vendors must complete as part of their onboarding process with Felix. If you require any updates to a vendor onboarding questionnaire, you can contact Felix Support team for assistance.

VENDOR QUESTIONNAIRES

The second type of questionnaire is the vendor questionnaire which may also be referred to as an ad-hoc questionnaire. This is sent out to vendors for any additional information needed at a later date beyond the initial onboarding.

Creating a vendor questionnaire

To create this questionnaire, you must fill out the vendor questionnaire template. You can request the template from the Felix Support team. Once you have completed the template, send the updated version back to Felix Support team. The Project Delivery team will configure the questionnaire and upload it to the **Tools > Questionnaires** tab.

Sending a vendor questionnaire

To send a vendor questionnaire via the Vendor List:

1. Navigate to **Vendors > View all vendors** from the main menu.
2. Select which vendor/s you would like to send the vendor questionnaire to by clicking the checkbox beside the vendor's name.

- 2 Vendors Selected [Send Questionnaire](#) [Suspend](#) [Clear](#) ...

- Send Questionnaire

Select an active Questionnaire

Questionnaire *


Monthly Vendor Report

Sign-off template

4. General Supplier Sign off

Response Deadline *

05/05/2023



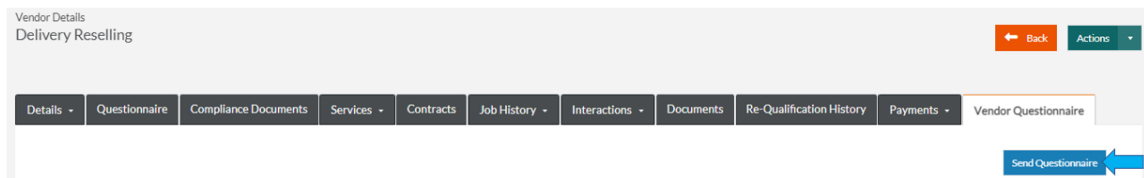
Notes to Vendor

Cancel

Send

To send a vendor questionnaire via the Vendor Profile:

1. Navigate to **Vendors > View all vendors** from the main menu.
2. Locate the vendor you would like to send the vendor questionnaire to 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 **Vendor Questionnaire** tab.
5. Click the **Send Questionnaire** button at the upper right corner.



6. Update the following fields:
 - a. (Required) **Questionnaire** - Select the appropriate questionnaire from the dropdown.
 - b. (Optional) **Sign-off template** - Select a sign-off template from the dropdown if applicable.
 - c. (Required) **Deadline to Respond** - Select a deadline for the vendor to respond to the questionnaire.
 - d. (Optional) **Notes to Vendor** - Enter any notes relevant to the vendor.
7. Click the **Send** button.

Send Questionnaire

Select an active Questionnaire

Questionnaire *

Monthly Vendor Report

Sign-off template

4. General Supplier Sign off

Deadline to Respond *

05/05/2023

Notes to Vendor



Cancel

Send

Tracking the vendor questionnaire

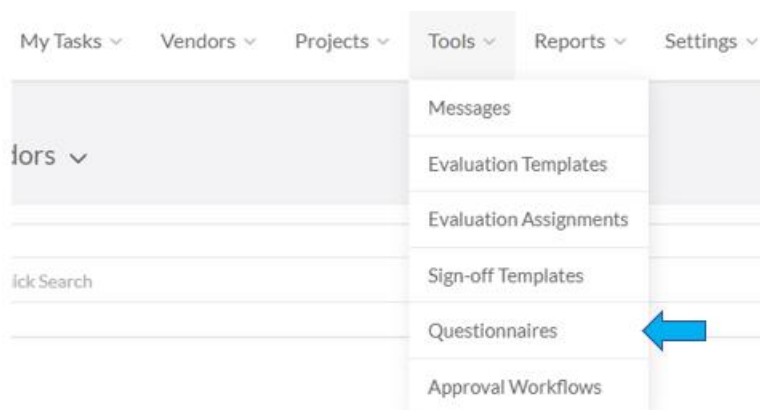
The **Vendor Profile** comprises the business information of a vendor. This includes the data provided by the vendor during onboarding, as well as documents and records you have added to effectively manage the vendor relationship. To access a vendor's profile:

1. Navigate to **Vendors > View all vendors** from the main menu.
2. Locate the vendor you would like to access by using the quick search or filters.
3. Hover over the **ellipsis icon** and select **View Profile** from the options.

	Name	Business Number	Tags	Panels	Status	Next Expiry	
<input type="checkbox"/>	Ok Felix	7180158528	 	<div> <div>CPBX0000000000000000000000000000000000Gre</div> <div>CPBX0000000000000000000000000000000000ter</div> <div>CPBX0000000000000000000000000000000000on</div> </div>	Pending Approval	30/06/2023	<div>...</div> <div>View Profile</div> <div>Evaluate</div> <div>Delete</div>
<input type="checkbox"/>	FELIX SOFTWARE PTY LTD	44600712589		CPBX0000000000000000000000000000000000on	Invited	N/A	

You can monitor the status of vendor questionnaires for a particular vendor through the **Vendor Questionnaire** tab. The statuses include Pending, Cancelled, Responded, Approved, and Declined. This tab contains all questionnaires that have been sent to the vendor.

In addition, the **Tools > Questionnaires** tab allows you to track whether a questionnaire is currently Active or Inactive. This tab contains all questionnaires, as well as their recipients. This can be accessed by navigating to the **Tools** tab and selecting **Questionnaires** from the dropdown from the main menu.



Managing vendor questionnaires

Viewing the recipients

By viewing the recipients, you can keep track of whether all intended recipients have received and responded to the questionnaire. This visibility enables you to take appropriate follow up actions, such as sending reminders to those who have not responded or updating their response deadlines accordingly.

To view the recipients of a questionnaire:

1. Navigate to **Tools > Questionnaires** from the main menu.
2. Locate the questionnaire you would like to view the recipients of by using the search tab or filters.
3. Click on the Questionnaire **Title** or hover over the **ellipsis icon** and select **View Recipients** from the options.

Questionnaires

Search by title

Search

Show filters

Title	Recipients	Responses	Date Created	Created By	Status	
Monthly Vendor Report	7	3	12/04/2019	Super Admin	Active	...
Quarterly ESG Report	-	-	23/03/2022	Super Admin	<div> <div>View Recipients</div> <div>Deactivate</div> <div>Update Response Deadline</div> <div>Remind vendors</div> </div>	
Subcontractors Fuel Consumption Report	4	4	23/03/2022	Super Admin		
Modern Slavery Questionnaire	7	1	23/03/2022	Super Admin		
360 Supplier Assessment - Microsoft North Sydney	2	1	02/12/2022	Super Admin	Active	...

Viewing a questionnaire

If you want to view a particular vendor, you can access it through the Vendor Profile. On the other hand, viewing a questionnaire via Tools enables you to view the questionnaires of multiple vendors simultaneously.

To view a questionnaire via the Vendor Profile:

1. Navigate to **Vendors > View all vendors** from the main menu.
2. Locate the vendor you would like to view the vendor questionnaire for 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.

[illegible]

- Go to **Vendor Questionnaire** tab.
- Locate the questionnaire you would like to view.

- Click on the Questionnaire **Title** or hover over the **ellipsis icon** and select **View Questionnaire** from the options.

Details -	Questionnaire	Compliance Documents	Services -	Contracts	Job History -	Interactions -	Documents	Re-Qualification History	Payments -	Vendor Questionnaire
Send Questionnaire										
Date Created	Title	Date Due	Submitted By	Date Submitted	Status					
23/03/2022	Subcontractors Fuel Consumption Report	06/04/2022	John Smith	23/03/2022	Approved					
11/05/2022	Monthly Vendor Report	01/06/2022	N/A	N/A	Pending					
						View Questionnaire Cancel Questionnaire				

To view a questionnaire via Tools:

- Navigate to **Tools > Questionnaires** from the main menu.
- Locate the questionnaire you would like to view by using the search tab or filters.
- Click on the Questionnaire **Title** or hover over the **ellipsis icon** and select **View Recipients** from the options.

Questionnaires						
Search by title				Search	Show filters	
Title	Recipients	Responses	Date Created	Created By	Status	
Monthly Vendor Report	7	3	12/04/2019	Super Admin	Active	...
Quarterly ESG Report	-	-	23/03/2022	Super Admin	Pending	View Recipients
Subcontractors Fuel Consumption Report	4	4	23/03/2022	Super Admin	Pending	Deactivate
Modern Slavery Questionnaire	7	1	23/03/2022	Super Admin	Pending	Update Response Deadline
360 Supplier Assessment - Microsoft North Sydney	2	1	02/12/2022	Super Admin	Active	Remind vendors

- Locate the vendor you would like to view the questionnaire for by using the search tab or filters.
- Click on the **Recipient** or hover over the **ellipsis icon** and select **View Questionnaire** from the options.

Recipient	Date Sent	Date Opened	Date Responded	Deadline to Respond	Status	
Veil & Support	24/03/2023	24/03/2023	-	30/03/2023	Pending	...
Veil & Support	24/03/2023	24/03/2023	-	28/03/2023	Pending	View Questionnaire
						Update Response Deadline
						Send Reminder
						Cancel Questionnaire

Deactivating a questionnaire

You may want to deactivate a questionnaire to ensure that no further responses can be submitted or to allow for revisions or updates, if necessary. When a questionnaire is deactivated, vendors who have already received it can still respond within the deadline, if applicable. However, you will not be able to create new assignments unless you reactivate the questionnaire for future use.

To deactivate a questionnaire:

1. Navigate to **Tools > Questionnaires** from the main menu.
2. Locate the questionnaire you would like to deactivate by using the search tab or filters.
3. Hover over the **ellipsis icon** and select **Deactivate** from the options.

Questionnaires

Search by title

Title	Recipients	Responses	Date Created	Created By	Status	
Monthly Vendor Report	7	3	12/04/2019	Super Admin	Active	...
Quarterly ESG Report	-	-	23/03/2022	Super Admin	Inactive	...
Subcontractors Fuel Consumption Report	4	4	23/03/2022	Super Admin	Inactive	...
Modern Slavery Questionnaire	7	1	23/03/2022	Super Admin	Inactive	...
360 Supplier Assessment - Microsoft North Sydney	2	1	02/12/2022	Super Admin	Active	...

4. Click the **Deactivate** button to confirm. The status will show as **Inactive**.

Deactivate Questionnaire

If you deactivate this questionnaire, it cannot be used to create new assignments. Vendors that already received this questionnaire can still respond until the deadline (if applicable). You may cancel outstanding assignments if you wish to prevent vendors from submitting responses.

You can reactivate this questionnaire at any time if you want to use it again.

Reactivating a questionnaire

Reactivating a questionnaire allows you to utilise it again in the future and to create new assignments based on its content.

To reactivate a questionnaire:

1. Navigate to **Tools > Questionnaires** from the main menu.
2. Locate the inactive questionnaire you would like to reactivate by using the search tab or filters.

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

Questionnaires

Title	Recipients	Responses	Date Created	Created By	Status	
Monthly Vendor Report	7	3	12/04/2019	Super Admin	Active	...
Quarterly ESG Report	-	-	23/03/2022	Super Admin	Active	...
Subcontractors Fuel Consumption Report	4	4	23/03/2022	Super Admin	Active	...
Modery Slavery Questionnaire	2	1	23/03/2022	Super Admin	Active	...
360 Supplier Assessment - Microsoft North Sydney	2	1	02/12/2022	Super Admin	Inactive	...

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<<
1
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View Recipients
Activate

Updating the response deadline of a questionnaire

This involves adjusting the timeframe within which vendors are expected to submit their responses, catering to the needs, timelines, and objectives of the questionnaire.

To update the questionnaire deadline for a specific vendor:

1. Navigate to **Vendors > View all vendors** from the main menu.
2. Locate the vendor you would like to update the questionnaire deadline for 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.

[illegible]

- Go to **Vendor Questionnaire** tab.
- Locate the questionnaire you would like to update the deadline for.
- Hover over the **ellipsis icon** and select **Update Response Deadline** from the options.

Details -
Questionnaire
Compliance Documents
Services -
Contracts
Job History -
Interactions -
Documents
Re-Qualification History
Payments -
Vendor Questionnaire

Send Questionnaire

Date Created	Title	Date Due	Submitted By	Date Submitted	Status	
23/03/2022	Subcontractors Fuel Consumption Report	06/04/2022	John Smith	23/03/2022	Approved	...
11/05/2022	Monthly Vendor Report	01/06/2022	N/A	N/A	Pending	... <div> View Questionnaire Update Response Deadline Send Reminder Cancel Questionnaire </div>

7. In the **Response Deadline** field, select the latest the vendor can respond to the questionnaire.
8. Click the **Update** button.

Note: The questionnaire must be in **Pending** status to update the response deadline for a vendor.

To update the questionnaire deadline for all vendors:

1. Navigate to **Tools > Questionnaires** from the main menu.
2. Locate the questionnaire you would like to update the response deadline of by using the search tab or filters.
3. Hover over the **ellipsis icon** and select **Update Response Deadline** from the options.

Questionnaires

Title	Recipients	Responses	Date Created	Created By	Status	
Monthly Vendor Report	7	3	12/04/2019	Super Admin	Active	...
Quarterly ESG Report	-	-	23/03/2022	Super Admin		View Recipients
Subcontractors Fuel Consumption Report	4	4	23/03/2022	Super Admin		Deactivate
Modern Slavery Questionnaire	7	1	23/03/2022	Super Admin		Update Response Deadline
360 Supplier Assessment - Microsoft North Sydney	2	1	02/12/2022	Super Admin	Active	Remind vendors

4. In the **Response Deadline** field, select the latest date vendors can respond to the questionnaire.
5. Click the **Update** button.

Update Questionnaire Deadline

Update questionnaire deadline for all recipients

Response Deadline *

Reminding vendors to respond to the questionnaire

The purpose of a reminder is to ensure that vendors are aware of the questionnaire, have not forgotten about it, and to encourage them to provide their responses within the specified timeframe.

To remind a specific vendor to respond to the questionnaire:

[illegible]

- Go to **Vendor Questionnaire** tab.
- Locate the questionnaire for which you would like to send the reminder.
- Hover over the **ellipsis icon** and select **Send Reminder** from the options.

6. Hover over the **ellipsis icon** and select **Send Reminder** from the options.

Details
Questionnaire
Compliance Documents
Services
Contracts
Job History
Interactions
Documents
Re-Qualification History
Payments
Vendor Questionnaire

Send Questionnaire

Date Created	Title	Date Due	Submitted By	Date Submitted	Status	
23/03/2022	Subcontractors Fuel Consumption Report	06/04/2022	John Smith	23/03/2022	Approved	...
11/03/2022	Monthly Vendor Report	01/06/2022	N/A	N/A	Pending	...

View Questionnaire
Update Response Deadline
Send Reminder
Cancel Questionnaire

Note: The questionnaire must be in **Pending** status to send a reminder to a vendor.

2. Locate the questionnaire for which you would like to send the reminder by using the search tab or filters.

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

Questionnaires

Title	Recipients	Responses	Date Created	Created By	Status
Monthly Vendor Report	7	3	12/04/2019	Super Admin	Active
Quarterly ESG Report	-	-	23/03/2022	Super Admin	<div> <div>View Recipients</div> <div>Deactivate</div> <div>Update Response Deadline</div> <div>Remind vendors</div> </div>
Subcontractors Fuel Consumption Report	4	4	23/03/2022	Super Admin	
Modern Slavery Questionnaire	7	1	23/03/2022	Super Admin	
360 Supplier Assessment - Microsoft North Sydney	2	1	02/12/2022	Super Admin	Active

4. Click the **Send Reminder** button to remind the vendors who are yet to respond.

Remind Vendor

Remind all vendors who are yet to respond?

Cancel

Send Reminder

Cancelling a questionnaire

When a questionnaire is cancelled, it is no longer active, and any existing assignments are terminated. As a result, it will prevent vendors from submitting their responses.

You can cancel a questionnaire via the **Vendor Profile** for a particular vendor or via **Tools > Questionnaires** for multiple vendors.

To cancel a questionnaire via the Vendor Profile:

1. Navigate to **Vendors > View all vendors** from the main menu.
2. Locate the vendor for which you would like to cancel the vendor questionnaire 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.

[illegible]

- Go to **Vendor Questionnaire** tab.
- Locate the questionnaire you would like to cancel.

6. Hover the **ellipsis icon** and select **Cancel Questionnaire** from the options.

Details -	Questionnaire	Compliance Documents	Services -	Contracts	Job History -	Interactions -	Documents	Re-Qualification History	Payments -	Vendor Questionnaire
Send Questionnaire										
Date Created	Title	Date Due	Submitted By	Date Submitted	Status					
23/03/2022	Subcontractors Fuel Consumption Report	06/04/2022	John Smith	23/03/2022	Approved					
11/05/2022	Monthly Vendor Report	01/06/2022	N/A	N/A	Pending					
						View Questionnaire Cancel Questionnaire				

7. (Optional) Click the **Notify vendor** checkbox to let the vendor know you cancelled the questionnaire.
8. Click the **Cancel Questionnaire** button.

To cancel a questionnaire via Tools:

1. Navigate to **Tools > Questionnaires** from the main menu.
2. Locate the questionnaire you would like to cancel by using the search tab or filters.
3. Click on the Questionnaire **Title** or hover over the **ellipsis icon** and select **View Recipients** from the options.

Questionnaires						
Search by title <input type="text"/> Search Show filters						
Title	Recipients	Responses	Date Created	Created By	Status	
Monthly Vendor Report	7	3	12/04/2019	Super Admin	Active	...
Quarterly ESG Report	-	-	23/03/2022	Super Admin		View Recipients
Subcontractors Fuel Consumption Report	4	4	23/03/2022	Super Admin		Deactivate
Modern Slavery Questionnaire	7	1	23/03/2022	Super Admin		Update Response Deadline
360 Supplier Assessment - Microsoft North Sydney	2	1	02/12/2022	Super Admin	Active	Remind vendors

4. Locate the vendor you would like to cancel their vendor questionnaire for by using the search tab or filters.
5. Hover over the **ellipsis icon** and select **Cancel Questionnaire** from the options.

Recipient	Date Sent	Date Opened	Date Responded	Deadline to Respond	Status	
Veil & Support	24/03/2023	24/03/2023	-	30/03/2023	Pending	...
Veil & Support	24/03/2023	24/03/2023	-	28/03/2023		View Questionnaire
						Update Response Deadline
						Send Reminder
						Cancel Questionnaire

6. (Optional) Click the **Notify vendor** checkbox to let the vendor know you cancelled the questionnaire.
7. Click the **Cancel Questionnaire** button.

Note: You can cancel the questionnaire of a specific vendor whether the status of the questionnaire is **Pending**, **Responded** or **Approved**.