Supplier Grouping

With a growing list of suppliers, some buyers may choose to group suppliers together for a cleaner UI/API experience.
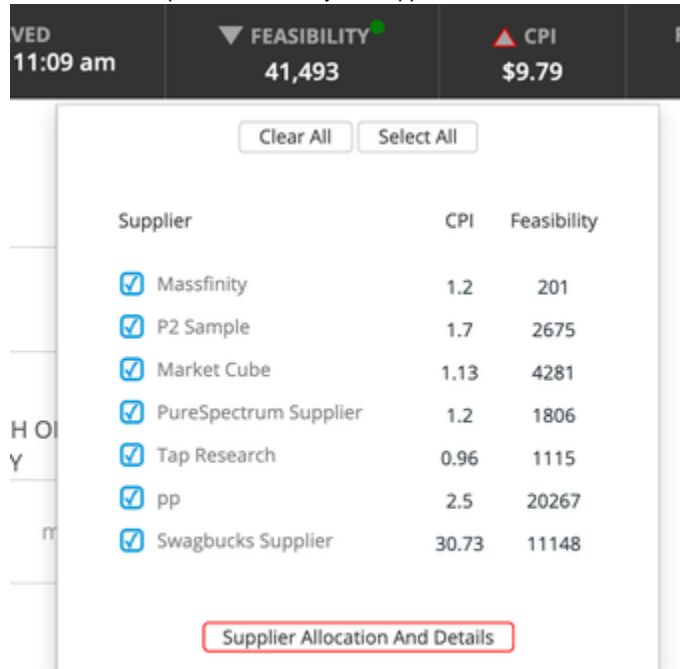
Grouped suppliers appear as a single supplier, combining and controlling the allocations and CPI values of multiple suppliers to make the UI more usable, and easier to manage. The grouped supplier is not a mechanism to hide survey details or buyer details from any party.

Supplier Grouping - New Surveys

To setup Supplier Groups on a new survey you can use the following steps:

Step 1 - Where can I group suppliers?

- Entered the survey details
- Click the CPI dropdown
- Click on "Supplier Allocation and Details" to open the Choose your Suppliers modal.

Step 2 - How do I group suppliers?

- Click on the names of the suppliers to highlight those you would like to group
- Click on the "Group Suppliers" button
- Enter details in Supplier Grouping modal

Step 3 - What details do I need to enter for a Group?

- Enter Group Name
- Group CPI
- Click "Save"
- The new Supplier Group in your list of suppliers where you can manage the grouped suppliers in this single instance

Step 4 - How do I make changes to my Supplier Groups?

Edit the Group Name, the CPI, and/or remove suppliers from the Group

- Click on the Edit icon next to the Group
- In the modal you can

✎ Test Group	$5.5	2,876
Market Cube	$1.13	4,281
PureSpectrum Supplier	$1.2	1,806

Ungroup existing Supplier Groups

- Click on the Supplier Group
- Click the "Ungroup" button

Add suppliers to an existing Supplier Group

- Click on the Group and the supplier you wish to add
- Click the "Group Suppliers" button
- This will open the Supplier Grouping modal that you can make any other adjustments you might need to the Group Name, CPI or other Suppliers in the Group.

Supplier Grouping - Edit Surveys

To setup Supplier Groups on a Live or Paused survey you will only need to change the first step:

Step 1 - Where can I group suppliers?

- Open Live or Paused survey
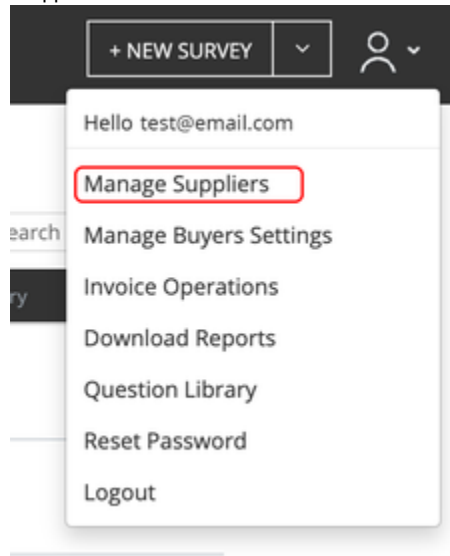- Click on "Add Suppliers" to open the Choose your Suppliers page

Supplier Blends

In order to avoid having to create Supplier Groups manually for every survey, we have also enabled Supplier Blends.

This feature allows you to can create preset Supplier Groups and apply by choosing them from a list.

You are also able to set a Supplier Blend as a default so that new surveys will have this Blend applied automatically.

Step 1 - How can I create my first Supplier Blend?

- In your account dropdown click "Manage Suppliers"

- On Manage Suppliers page click on "Supplier Blends" tab
- Click on "New Supplier Blend"

- Type name of Blend where it says "Enter Name"
- In the list of suppliers click on the names of those you want to group

- Click on "Group" button
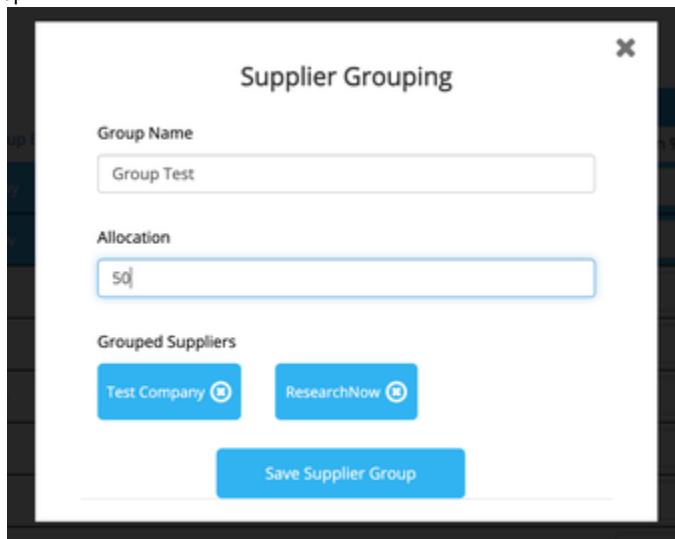
Group

Supplier Group Blends > | Enter Name | Allocation %

Test Company	
ResearchNow	
Massfinity	
P2 Sample	

- In the Supplier Grouping modal enter the Group Name and default Allocation percentage for the group
- Click on "Save Supplier Group"

Supplier Grouping

Group Name

| Group Test |

Allocation

| 50 |

Grouped Suppliers

Test Company ⊗   ResearchNow ⊗

Save Supplier Group

- When you have completed entering the desired groups click the "Save" button at the bottom of the page

ℹ️ You can also set the default Allocation for individual suppliers in the supplier list so that these will be applied when choosing a Supplier Blend for a survey.

Step 2 - How do I set a Default Supplier Blend?

- Click the checkbox next to the name of the Supplier Blend you wish to set as your default for all new surveys

SUPPLIER ACCESS   SUPPLIER BLENDS

New Supplier Blend

Set As Default	Blend Name			
☑	Test Blend	Test Group	Edit | Delete	

ℹ️ This is not required, but is useful for situations where you don't want to have to set a Blend each time you create a survey.

Step 3 - How do I apply a Supplier Blend to a Survey?

- Entered the survey details
- Click the CPI dropdown
- Click on "Supplier Allocation and Details" to open the Choose your Suppliers modal.

- Click on the "Choose Supplier Blend" dropdown menu
- Click on the Supplier Blend you want for this project

The Allocation percentages entered when creating your blend will map to your Supplier Groups and individual suppliers as they were entered.

The CPI values for Groups will populate with the average CPI of the suppliers before grouping.