

Supplier Grouping

With a growing list of suppliers, some buyers may choose to group suppliers together for a cleaner UI/API experience.

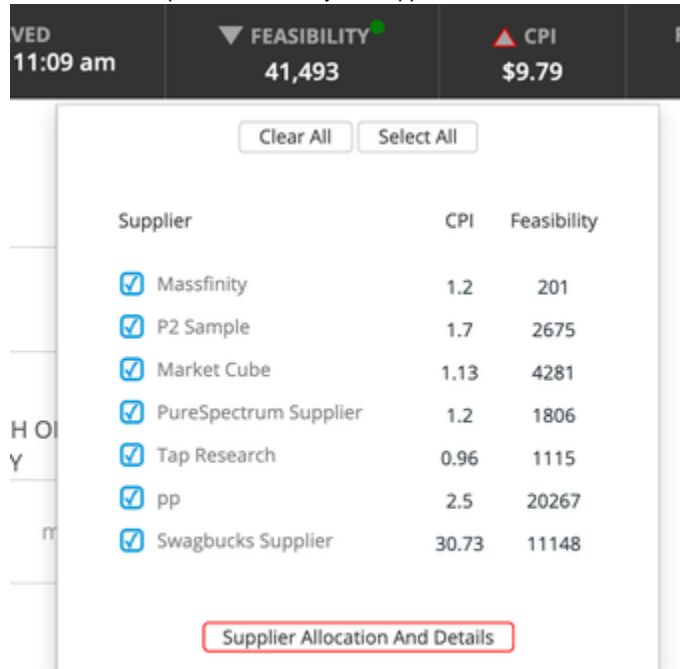
Grouped suppliers appear as a single supplier, combining and controlling the allocations and CPI values of multiple suppliers to make the UI more usable, and easier to manage. The grouped supplier is not a mechanism to hide survey details or buyer details from any party.

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

(877) 865-PURE LAST SAVED Apr 23 2021, 11:09 am FEASIBILITY 41,493 CPI \$9.79 FIELD TIME 4

Choose your Suppliers

We evenly distribute your completes to each supplier. To edit, click in the Allocation fields and change your quantity by numbers or percentages.

Clear All Distribute Select All Group Suppliers

Choose Supplier Blend CPI FEASIBILITY ALLOCATION by 100 % Flexibility

	CPI	FEASIBILITY	Quantity	Percentage	Min	Max
Massfinty	\$1.2	201	8	8	0	100
P2 Sample	\$1.7	2,675	7	7	0	100
Market Cube	\$1.13	4,281	7	7	0	100

Pause Operator Override

Finalize & Launch!

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

Supplier Grouping

Group Name

CPI

Grouped Suppliers

Massfinty P2 Sample

Save group for survey

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

Flexibility by 100%

		Quantity	Percentage	Min	Max
<input checked="" type="checkbox"/> Test Group	\$5.5	15	15	0	100
Market Cube	\$1.13	7	7	0	100

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.

Flexibility by 100%

		Quantity	Percentage	Min	Max	
<input checked="" type="checkbox"/> Test Group	\$5.5	2,876	15	15	0	100
Market Cube	\$1.13	4,281	7	7	0	100
PureSpectrum Supplier	\$1.2	1,806	7	7	0	100

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

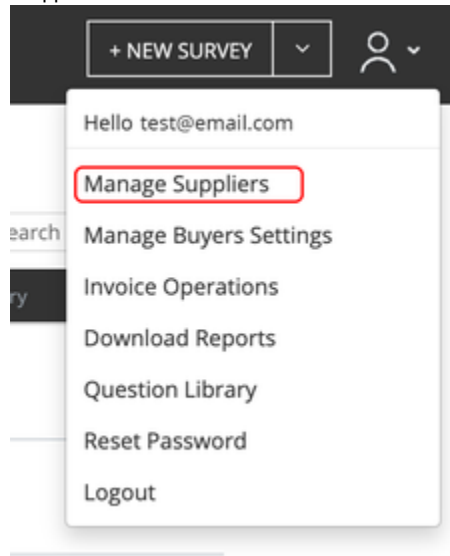
In order to avoid having to create Supplier Groups manually for every survey, we have also enabled Supplier Blends.

This feature allows you to 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"

Manage Suppliers

SUPPLIER ACCESS

SUPPLIER BLENDS

New Supplier Blend

Set As Default

Blend Name

- 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

SUPPLIER ACCESS

SUPPLIER BLENDS

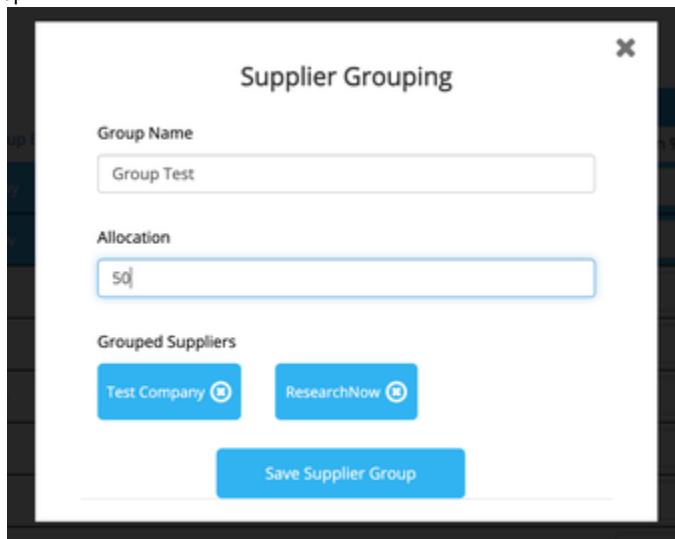
Group

Supplier Group Blends > Enter Name

Allocation %

Test Company	<input type="text"/>
ResearchNow	<input type="text"/>
Massfinty	<input type="text"/>
P2 Sample	<input type="text"/>

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



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

i 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		
<input checked="" type="checkbox"/>	Test Blend	Test Group	Edit Delete

i 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.

Supplier	CPI	Feasibility
<input checked="" type="checkbox"/> Massfinty	1.2	201
<input checked="" type="checkbox"/> P2 Sample	1.7	2675
<input checked="" type="checkbox"/> Market Cube	1.13	4281
<input checked="" type="checkbox"/> PureSpectrum Supplier	1.2	1806
<input checked="" type="checkbox"/> Tap Research	0.96	1115
<input checked="" type="checkbox"/> pp	2.5	20267
<input checked="" type="checkbox"/> Swagbucks Supplier	30.73	11148

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

Choose your Suppliers



We evenly distribute your completes to each supplier. To edit, click in the Allocation fields and change your quantity by numbers or percentages.

	CPI	FEASIBILITY	ALLOCATION		Flexibility	
			Quantity	Percentage	Min	Max
Massfinty	\$1.2	172	12	12	0	100
P2 Sample	\$1.7	2,293	11	11	0	100
Market Cube	\$1.13	3,669	11	11	0	100

i 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.