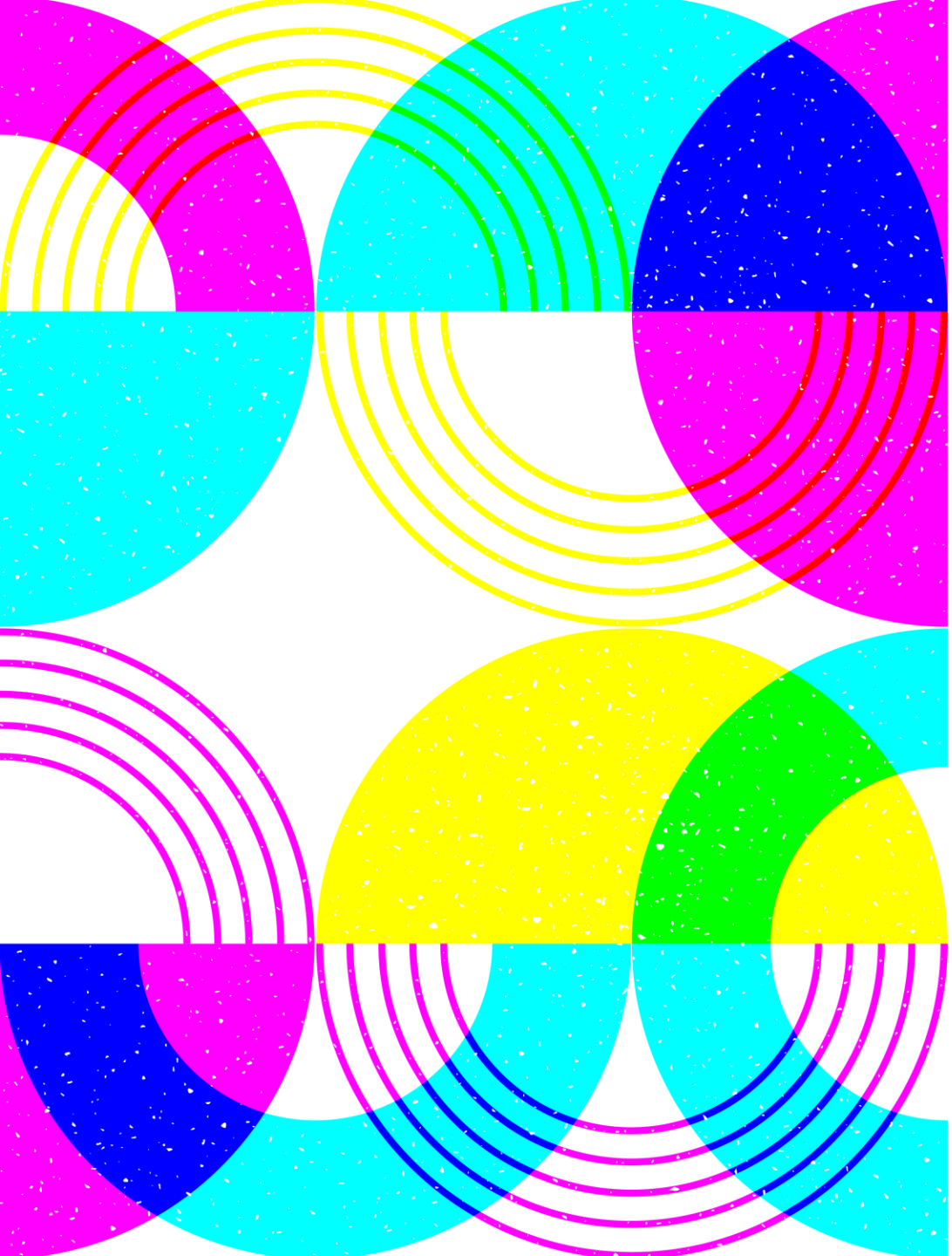


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# From Chaos to Control: Smarter Vendor Management with Qmlativ

*Jordan Steltenpohl*
*Product Manager – Qmlativ Business*

# Session Agenda



Today’s Tools: Vendor Management—What you can do right now



Today’s Upgrade: Brand-new Vendor Approvals



Tomorrow’s Experience: The Vendor Portal is coming

# Software Demo – Current Functionality



# Vendor Approvals – What's the Value?

- Currently a manual process in Qmlativ
  - Handled via paper or electronic forms
  - Still must manually enter vendor records
- A process SMS customers are accustomed to
- A building block for the future



# Vendor Approvals – Included Features

- Submit request to add a new vendor
  - Includes demographic, W9, and ACH info
- Full approval workflow
  - Vendor groups, multiple approval levels, my vendor approvals screen, mass approval
- Approval notifications
- Attachment upload
- Sam.gov verification
- Approve and reroute vendor requests

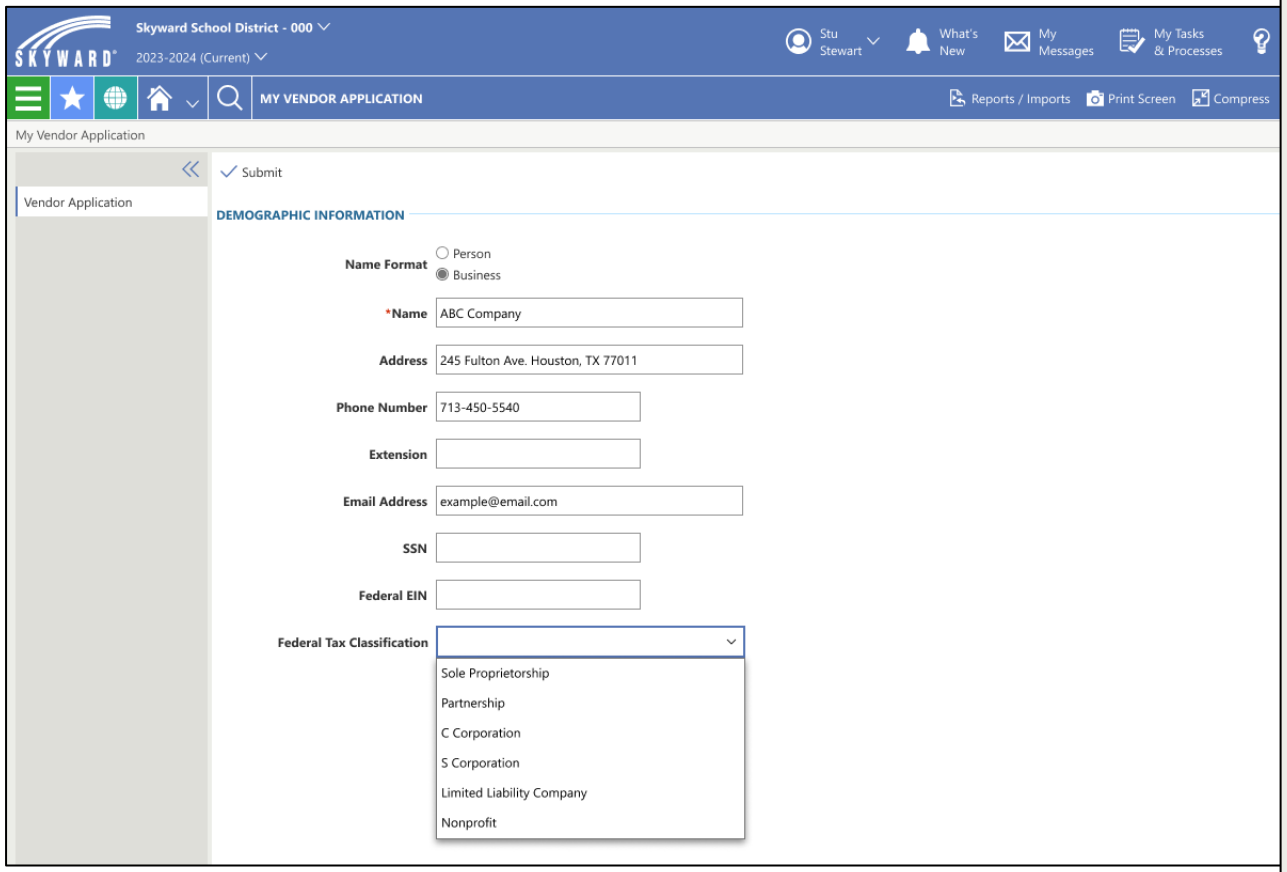
# Software Demo – Vendor Approvals

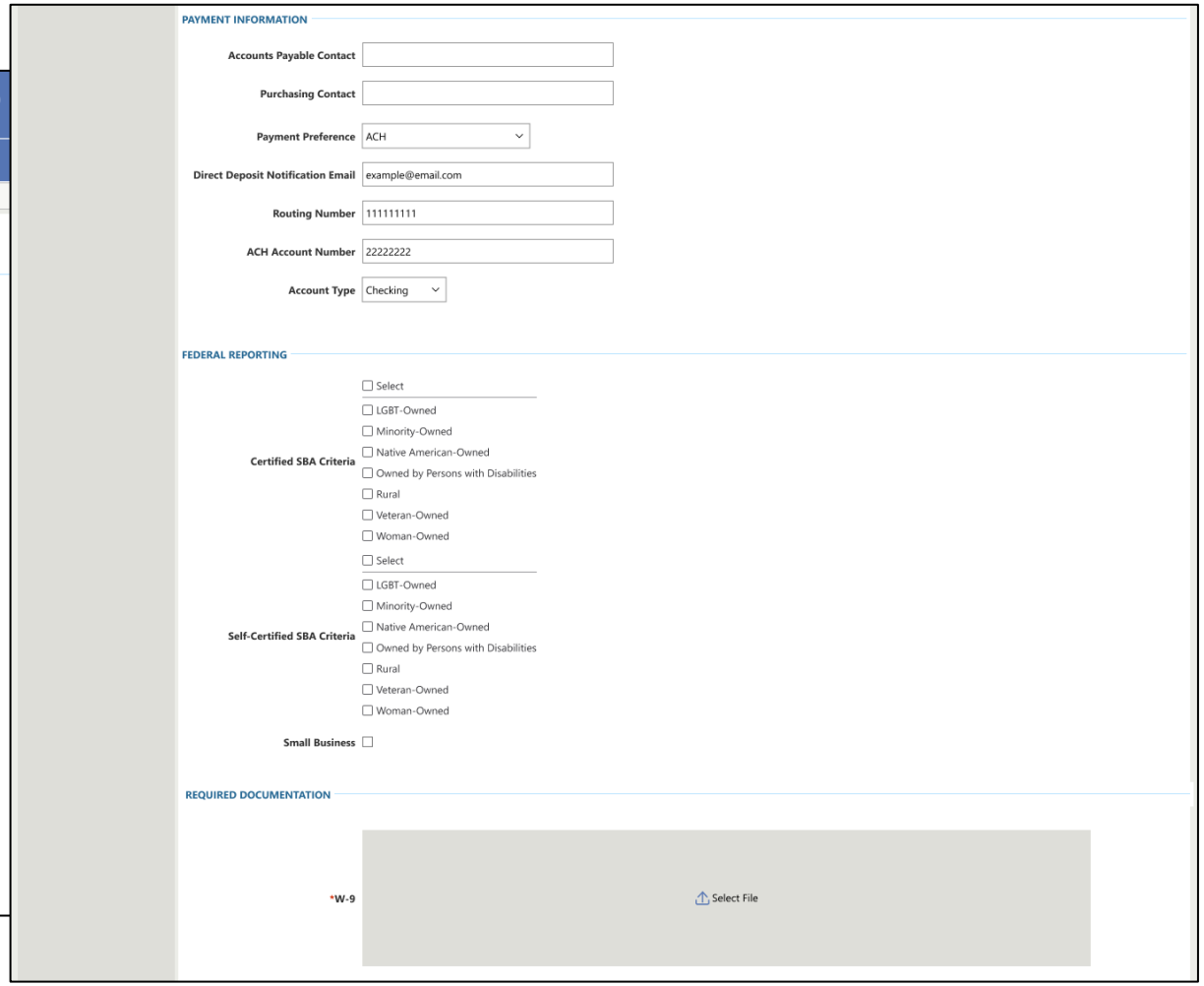


# Vendor Portal – What's the Vision?

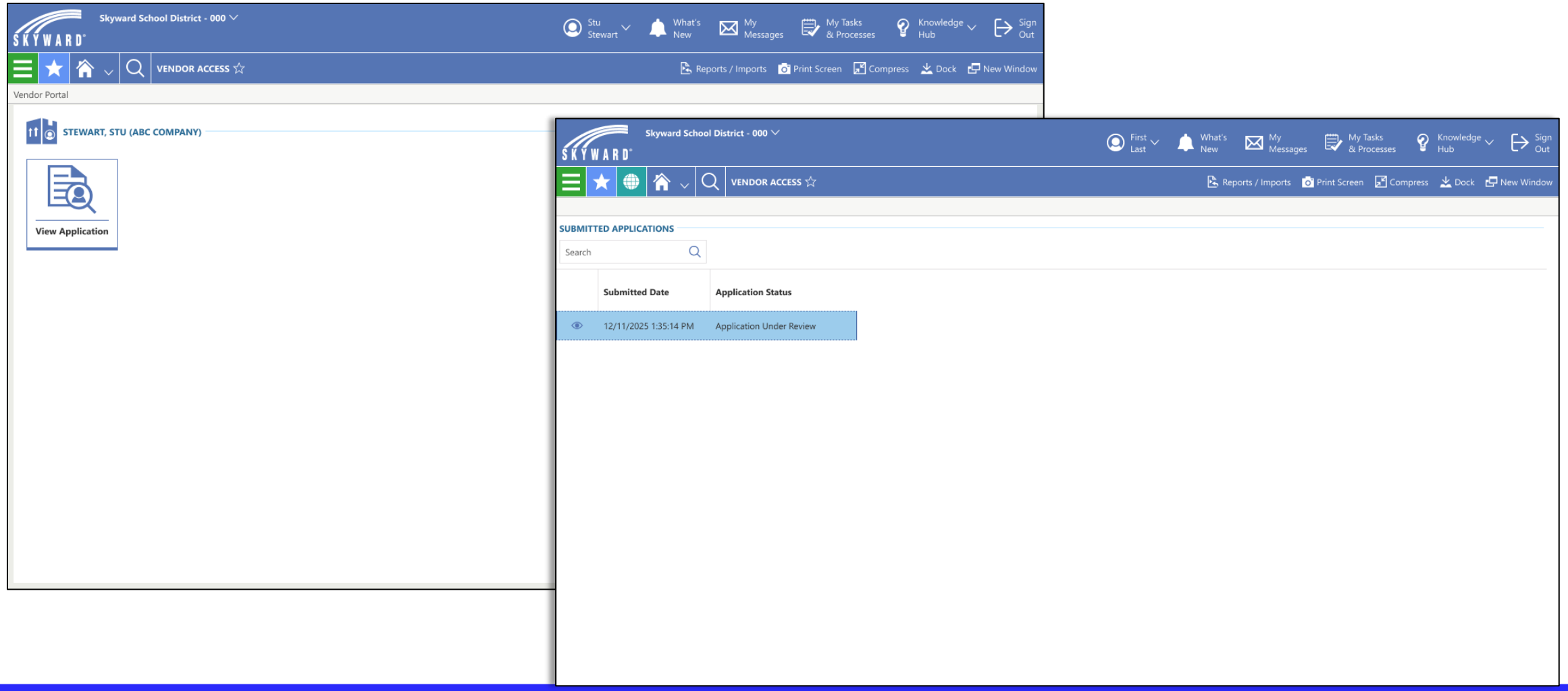
- What is a vendor portal?
- How does a vendor portal help you?
  - Increased efficiency by eliminating data entry
  - Reduced back-and-forth between vendors and districts

# Vendor Portal Mockups - Registration

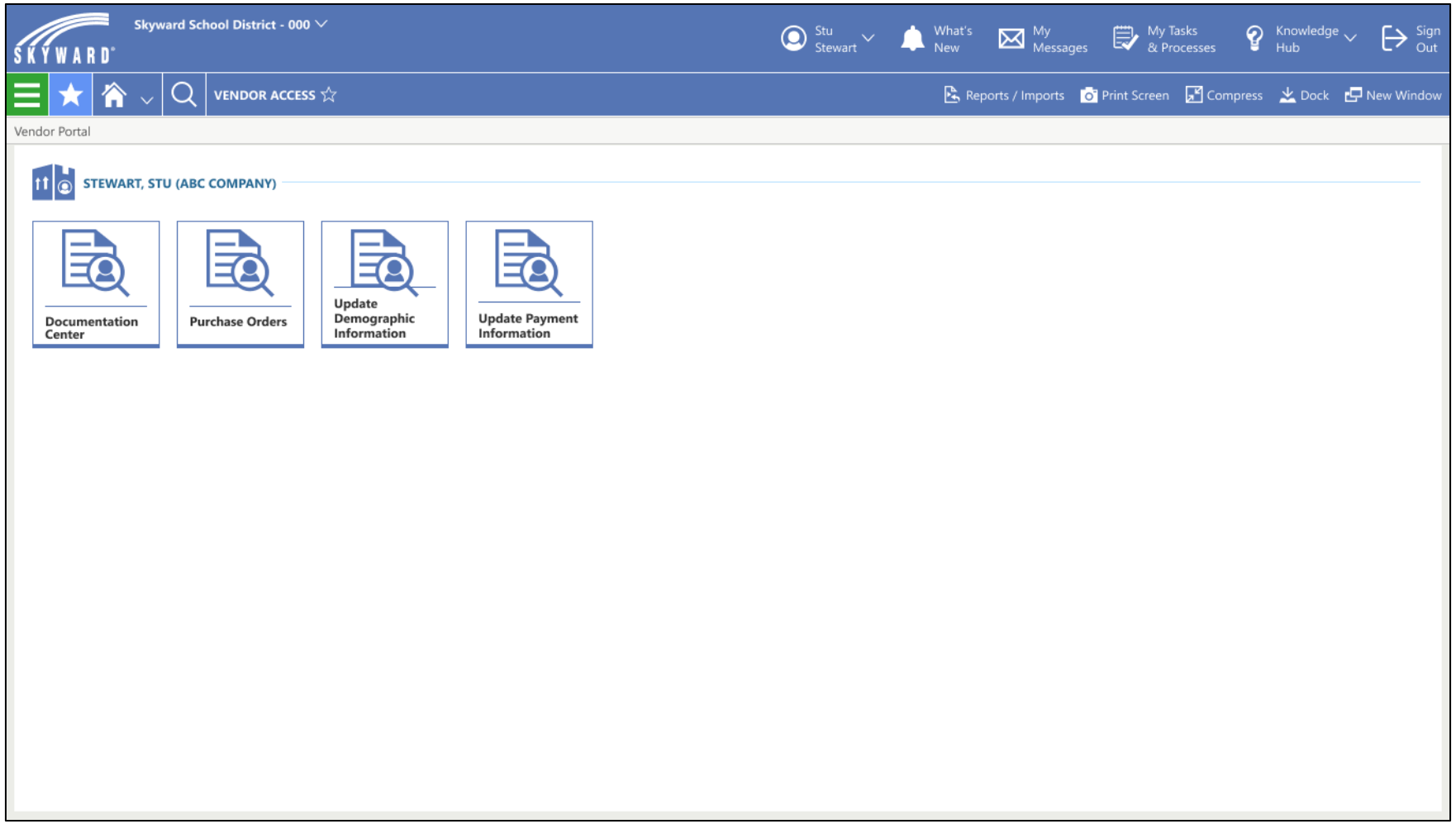


# Vendor Portal Mockups – Application Review

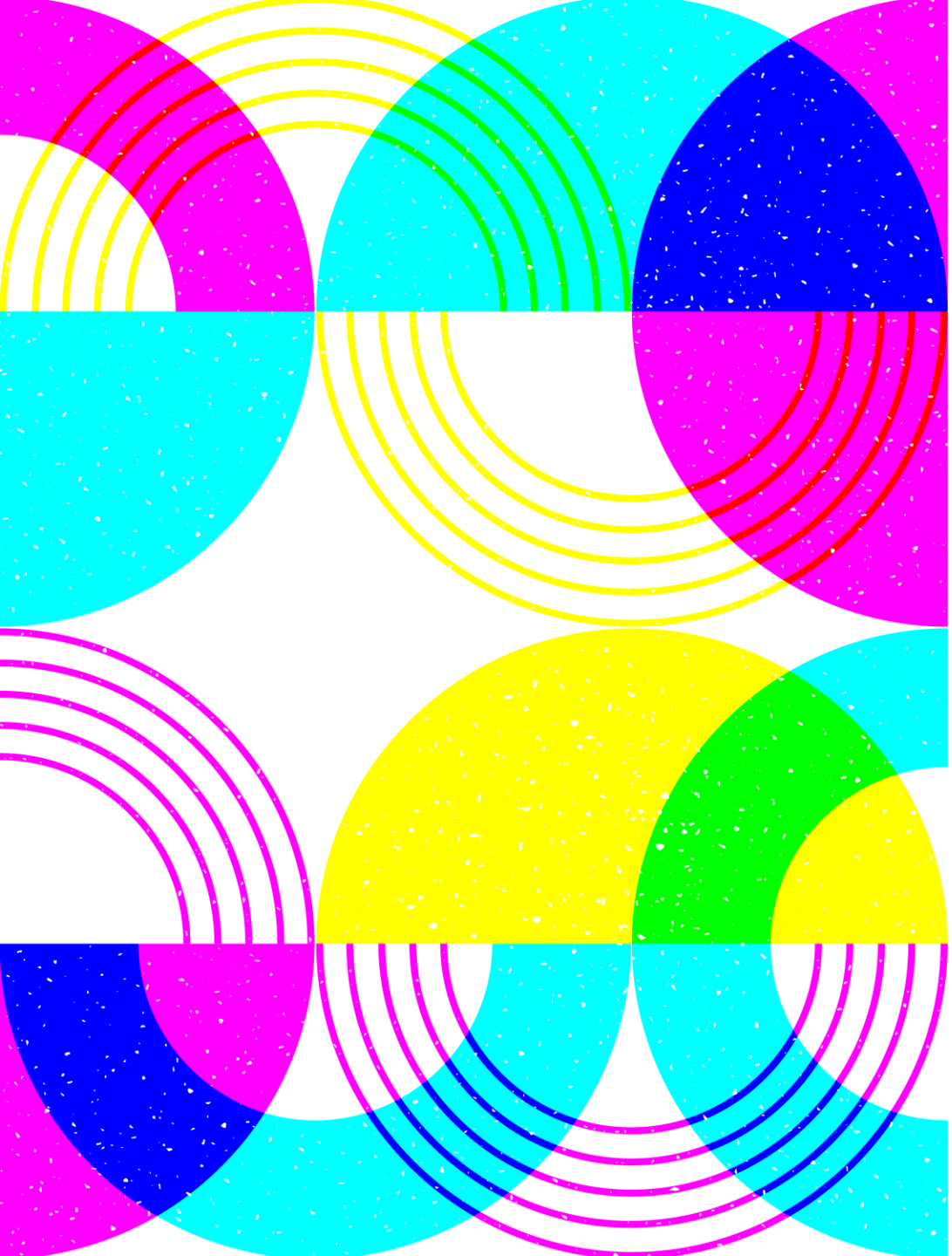


# Vendor Portal Mockups – Approved Vendor



# Portal Recap

- What challenges do you foresee in getting vendors to adopt a self-service portal?
- What controls or safeguards would your district need to feel comfortable with vendor self-service?
  - What concerns do you have about giving vendors access to your system?
  - What kinds of permissions or approval workflows would you want in place?
  - What benefits or risks do you see with opening up this kind of access?



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# thank you!