

Supplier Relationship Management

Feature

Build trust, stay compliant, and keep supplier documentation audit-ready

Build Strategic Partnerships and Trust with your Suppliers.

This feature enables you to effectively manage supplier information—create document checklists, manage documentation validity/expiry dates, and download missing document reports. Managing your supplier documents enables you to keep track of any missing documents, giving you visibility of expiring documents.

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Epic's **Supplier Relationship Management** feature gives organisations a structured, centralised way to manage supplier documentation—ensuring every file is tracked, every expiry is flagged, and every relationship is built on transparency. It replaces manual checklists and email follow-ups with automated reminders, downloadable reports, and a live dashboard that keeps procurement teams in control.



Whether you're onboarding new suppliers or maintaining long-term partnerships, this feature turns paperwork into peace of mind.

Key Functions

- **Custom Document Checklists:** Create tailored document checklists for each supplier, including categories and expiry dates—ideal for contracts, certifications, insurance, and compliance records.
- **Supplier Profiles & Allocation:** Add suppliers and assign relevant checklists. Upload documents directly to each profile, making it easy to track who's submitted what.
- **Expiry Tracking & Reminders:** Set expiry dates for time-sensitive documents. Epic automatically reminds responsible staff when items are missing or out of date—keeping compliance on track.
- **Missing Document Reports:** Generate downloadable reports that show all missing or expired documents per supplier—perfect for audits, reviews, and follow-ups.
- **Support Groups & Staff Assignment:** Create support groups and assign staff to manage specific suppliers—ensuring accountability and shared ownership.
- **Supplier Dashboard Overview:** View a live dashboard showing document status across all suppliers—giving procurement and compliance teams instant visibility.
- **Supplier Evaluation:** Create structured evaluations for each supplier, define criteria with rating scales, capture comments, and track scores over time. Evaluations can be copied, edited, archived, and linked to projects - driving continuous improvement and strengthening supplier relationships.