

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 & download missing document reports.

Managing your Supplier documents enables you to keep track of any missing documents, giving you view of expiring documents.

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 Epic automatically reminds responsible staff when items are missing or out of date—keeping compliance on track.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.