



## Preferred Supplier Admin FAQs

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### **How long should my changes take to display?**

Most changes will have to go through an update process which takes approximately **one hour**. Some examples of changes include:

- Applying a list to ESP Web, an ESP Website, or a Company Store
- Updating an applied list
- Updating the labels or rankings on an applied list
- Exclusions to be made live
- Preferred pricing settings to be effective
- Notes to be seen

If you have made changes to an existing list but you do not see the changes after an hour has elapsed, please contact the ASI Technical Product Support Department.

### **Can multiple lists be applied?**

Sometimes, users of ESP will have a list provided by their company administrator, but users may also have their own preferred list. In these situations, there are a few key things to keep in mind regarding how the information will be displayed.

1. If you are not a preferred supplier admin and have created your own list for preferred vendors, however, your company also has a company administrator which has applied a list, the company list will take precedence over your individual list.
2. If you are a member of a corporate organization, the main corporate list will take priority over the individual company's list.

### **If multiple lists are applied and merged, which list takes precedence?**

In the event that the company admin would like to merge two existing lists, there is an option within the preferred supplier admin to determine which list should be given priority.

For example: If a user has two lists applied and one list has a supplier rank of 2 while the other has the same supplier ranked as a 1, you are also able to specify which ranking you would like to refer to, the higher rank or the lower one.

### **How do I specify ranking options during the merge process?**

To set up this option, go to the Settings in the Preferred Suppliers Admin.



## Create a Preferred Supplier List

[Import List](#)

Click the radio button next to your choice (High to Low or Low to High). You can also select whether you would like to enable individual users the ability to share notes. Shared notes are entered by users (administrators and standard) and available for all users in the company. By checking the "Do not allow any user in my company to add a Shared Note" box, notes for all users in the company will be managed solely by administrators.

### List Conflict Settings

Sometimes, a User is assigned several lists. ESP combines these lists and creates a master or "Merged List" for the User. Let us know which supplier rank to use when the supplier appears in more than one assigned list with different ranks.

- High to Low  
(Use Rank 1 over Rank 2)
- Low to High  
(Use Rank 2 over Rank 1)

### Notes Settings

- Do not allow any User in my company to add a Shared Note.  
Previously Shared Notes will not be deleted.

Click on the Save button when you are finished.

## Merging a Corporate or Company List with an Individual List

If you are a member of a corporation, a Corporate or Company list might be added to your ESP and it can merge with an individual's existing list. When a user with an existing list has a corporate or company list applied to their account, the lists will be automatically merged. The corporate or company list will always take priority over the individual's. This includes preferred labels, rankings, and pricing.

**Note:** This action cannot be undone and individuals cannot edit the corporate list.

After the lists are merged, you will still be able to edit the preferred suppliers that were on your individual list, but will not be able to make changes to vendors on the corporate or company lists.

## Where do the text fields when establishing preferred pricing display?

There are two text fields related to creating preferred pricing:

- **Additional Details or Exceptions:**

Include more detailed information about the preferred pricing agreement or exceptions

- **Preferred Category Note:**

Enter a note about this supplier. These fields will be displayed when hovering on a

product results listing

**If I set preferred pricing (ex. EQP) for a supplier, will my preferred pricing carry through the order process?**

Yes, preferred pricing will be displayed in the master sales order and purchase order(s).