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Global Institutional Solutions

Business Growth & Continuity (BG&C)

## Toolkit Template Supplier List

**Objective:** This template has been developed to record critical basic information related to your business' suppliers and any unique strategies, processes or arrangements related to a supplier.

This specific template helps organize information about your supplier to assist someone taking over the function to have all the information in one place. This template should be completed for each Supplier. This is designed for service or product companies. If the case of service companies some of the fields may be skipped.

- Supplier Name
- Supplier number
- Supplier Address
  - Street
  - State
  - Zip code
  - Phone
- Contacts
  - Name
  - Title
  - Email
  - Telephone
  - Preferred contact method and frequency
  - Repeat this for all contacts at this Supplier
- Contract Terms
  - Pricing
  - Discount Amount
  - Minimum Order Size:
  - Maximum Order Size:
  - Payment Terms:
- Recent Order History
  - Order Date
  - Order Amount
  - Paid on time
- Pricing terms
  - Discount percentage



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- Quantity tiers
  - Product exclusions
  - Specific conditions
- Recent Order History
  - Order Date
  - Order Amount
  - Arrived on time and complete