

Vendor Management Process in the Clarifire® Application

Until now, third party management with solid procedures, performance metrics, contract oversight, periodic reviews, and appropriate vetting of potential vendors, was the missing piece of the business process management puzzle. eMASON has filled the void with its Clarifire application - a web-based business process automation technology hosted in a secure private cloud environment. The software presents process automation and data management in a way that all users can embrace, regardless of technical background. Data, images, contacts and processes are centralized and synchronization of all work activities is enabled. Clarifire delivers an advanced, all-in-one solution to manage large-scale vendor management processes.

The Clarifire Advantage:

- Simplified access and auditability through an easy-to-use, web-based application. (For example, Clarifire can automatically place orders and generate follow up actions if the order is not filled within the vendor SLA in accordance with specific business rules).
- Increased efficiencies via “world view” dashboards and automated (meaning humanless) workflow.
- Complete visibility of data and auditability of the vendors, processes, and work activities.
- Reduced email/phone communication within the vendor network.
- Streamlined integration paths.
- Data, images, and processes are located in one view.
- Reduced costs and required resources.
- Real-time performance metrics on the client’s dashboard.

Managing the Agreement Process in the Clarifire application

Clarifire allows clients to capture and manage processes associated with review and approval of the vendors in the first instance, as well as the subsequent onboarding processes. In addition to configured registration processes, dashboards offer process views for both the vendor and client that make it easy to ascertain whether the registration process is on track. In short, the procurement process is streamlined as is the vendor approval process.

eMASON’s Clarifire technology offers clients the ability to document the entire vendor procurement process, allowing the storage of the application information (actual documents), the terms of contract and other key information in the agreement processes (within the Images tab for these processes). These items can be tracked on the [Agreement Dashboard](#) for easy access. Finally, Clarifire can automatically generate vendor agreements with the [Document Assembly](#) feature.

Key features of the Clarifire application include:

- Dashboards
- Vendor Management Process
- Standardized Processes
- Performance Tracking

1. Using Clarifire Dashboards for visibility and process management:

Driven by client business rules, the Clarifire application provides a one-stop view of all compliance audits in a web-based dashboard. This easy-to-access and monitor Dashboard is an invaluable tool in preventing lost or missed deadlines and completing audits on a timely basis because it provides transparency and visibility into users' deadlines, notes and processes.

Visibility into Vendor information via the Clarifire Dashboard

Clarifire's vendor management feature interacts with cases and processes in the system and links the contacts to the work. Additionally, Clarifire Dashboards can be further configured to pull specific vendor information by state and even zip code. A sample Dashboard is below; this view is easy to change.

The screenshot shows the Clarifire application interface. At the top, there is a navigation bar with the MASON logo and the text 'Simplify. Clarify. Clarifire®'. The main header area includes the 'Clarifire' logo and 'eMASON Clarifire Application'. Below this is a navigation menu with options: Home, Case Manager, Contacts, Dashboard, Image Management, Manage Dashboard, and Reports. There is also a search bar and a 'Search' button. The main content area is titled 'Current Dashboard: Vendor Management'. It features several expandable sections:

- Work Queue:**
 - Overdue Deadlines: 145
 - Deadlines Due Today: 0
 - Deadlines Due Tomorrow: 0
 - Upcoming Deadlines (Next 2 Weeks): 0
- Notes:**
 - Questions from Vendors: 1
 - Responses from Vendors: 3
 - Questions Sent to Vendors Not Reviewed: 27
- Alerts:**
 - Expired Vendor Agreements: 0
 - Vendor Reports Review Overdue: 0
 - Applications Requiring Management Review: 0
- Contract Management:**
 - Agreements Expiring Next 30 Days: 0
 - Fee Schedules Expiring Next 30 Days: 3
 - Awaiting Vendor Execution: 52
- Compliance:**
 - Cycle Time Reports to Review: 0
 - Charge Back Reports to Review: 0
 - Performance Reports to Review: 0
- Onboarding:**
 - New Applications to Review: 0
 - Applications Missing Information: 0
- Images:**
 - Vendor Applications: 1
 - New Contracts to Review: 1
 - Vendor Expansion/Reduction Report: 0
 - New Vendor Territory Agreements: 0
- Issues Reporting:**
 - Open Pricing Issues: 0
 - Open Communications Issues: 0
 - Open Missing Photos Issues: 0
 - Open Coverage Area Issues: 0
- Statistics:**
 - Work Orders MTD: 0
 - Work Orders YTD: 290
 - Bids Received MTD: 52
 - Bids Received YTD: 0
 - Active Work Orders: 583

The footer of the dashboard includes the MASON logo and the text '© eMASON. All rights reserved. Build Ver. 3.5.11.01'.

2. Contact Management in the Clarifire application:

Vendors are set up as both contacts and users in the Clarifire application. The user status gives vendors visibility into the processes and the ability to complete actions, view images, upload images and submit notes. Each user in the application must be set up as a contact. Contacts are managed in the [Contacts](#) tab.

Managing Vendor contacts using Contact Types

The Clarifire application's contact management functionality allows for unlimited creation of contacts and customized grouping of contacts using [Contact Types](#) resulting in easily searchable and accessible contact/client records. Clients can easily pull the list of the vendors with a particular Contact Type at any time.

Clarifire provides the flexibility to export search results to a CSV format (Excel-compatible) or to a designated printer for printing if desired.

Users can easily assign a Contact Type, thereby grouping the contacts/clients together by type (Property Inspections, Property Preservation, REO Property Maintenances, Valuations, etc.).

The [Contact Management](#) functionality (Contacts tab) also allows users to search for vendors/contacts by first name, last name, email address or contact type.

Additional search options allow clients to generate lists based on specific geographical criteria including radius, zip code, and state. The radius search option can be leveraged to manage allocation of resources and resource efficiency.

3. Associated Processes:

Unlike other vendor management systems, the Clarifire application provides a complete view of all types of work that a vendor is handling in the system. The [Associated Processes](#) tab allows visibility into all processes that the vendor is a "share" on. The results can easily be sorted by the case name, process name or the process status. Vendors can also be automatically or manually associated with files/processes for easy searching.

The [Related Flow](#) is a comprehensive view of all processes associated with a particular case that a specific vendor is assigned to.

Related Flow
Case Name : Sullivan CSPI
Case Type : Operations [Edit](#)

▼ **Related Cases**

▼ **Case CDCs**

▼ **Processes**

Process Type	Process Name	Description	Start Date	Status
Vendor Management	Vendor Application Process		6/1/2011 8:14:07 AM	Completed
Vendor Management	Vendor Contract Management	Vendor Contract Management	6/1/2011 8:47:11 AM	Created

Selected Process : Vendor Contract Management [Vendor Contract Manage

Action Add Action **CDC** Compliance Contacts Hold/Issues Images Notes Shares

Due Date	Action Name	Description	Status	Compliance Date	Completed Date	Process Name
6/1/2011	Enter Fee Schedule		Completed		6/1/2011	Vendor Contract Management
6/1/2011	Enter Territories into Table		Completed		6/1/2011	Vendor Contract Management
6/2/2011	Initial Contract Review		Created			Vendor Contract Management
6/2/2011	Vendor Manager Approval		Created			Vendor Contract Management
8/10/2011	Contract Expiration Date	Review Vendor Contract	Completed		6/1/2011	Vendor Contract Management

Configured Processes Complete with Business Rules

Additionally, configured processes can be created and assigned to select vendors to report on milestone information and provide feedback to the client. Questions and data fields can be included in the **Configurable Data Collectors (CDCs)** and can be linked to specific actions or processes to which vendors are assigned.

A CDC (web-form) can be added for each of the vendors so that a variety of information can be captured. Specific examples include: fees and costs, survey/registration information, comments.

In fact, CDCs can include literally any type of information needed by the client, and customized reports (available in the **Reports** tab) can be created per the client’s request and guidelines.

Clarifire processes allow clients to upload images (e.g. contracts) to the contact records (**Contacts** tab).

Utilizing Holds and Issues in Vendor Management

Holds and issues are an inherent part of the Clarifire application’s tracking functionality. These events can be easily monitored via the Clarifire Dashboard. When an action or a process is put on hold for any reason or there is an issue with the process moving forward, the Dashboard will capture this and provide visibility. Holds and issues are critical, real-time indicators of vendor performance.

Timeline Compliance

The Clarifire application similarly affords the mean for clients to measure their own performance, particularly clients' time requirements to complete certain tasks. The **Time Compliance** section/tab of the Clarifire application is reflected on the **Process Builder** for the process template. Estimates are set up in the Process Builder for the process template. The actual completed date can be compared against the estimates in a Related Flow view/action tab.

4. Reporting and visibility:

Clarifire offers customized reports in several places within the application. The Reports tab offers a list of customized reports. These reports can be created per the client's request to include data captured by the Clarifire processes. Information can be sorted and queried based on any case data (action, process, related flow data and elements: CDCs, notes). A file level status report (available in all three levels: action, process and related flow/case detail screens) can also be generated to pull in specific CDC data as needed into a comprehensive status report by case.

Clarifire reports can show data based on client and vendor relationships (servicers by vendor or which vendor is assigned to a case). Historical and real-time data can be presented in a customized report.

Further, Clarifire provides an easy-to-use yet powerful administration console that can store system-wide standards by which to measure vendors. The table is designed to allow for different standards within the same state based on value types. An example might be improved property vs. vacant land.

This table is used to generate *scorecard reporting* for individuals or groups of vendors based on quantifiable events or data elements, like timelines (overall and between groups of actions), fees and costs, holds, re-projections, exceptions and volumes. As market conditions change so can the values the vendors are measured by.

In sum, Clarifire simplifies Vendor Management and maximizes efficiencies. Businesses save time and money with customizable, automated workflows and enjoy one view of processes in real-time. Clarifire puts the "manage" in Vendor Management.

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