



SRM Dojo Configuration Checklist

In order to get the most out of your SRM Dojo account, you will need to complete the below essential steps and we recommend completing the optional steps too:

Essential

- Generated data
- Set up your SRM activities
- Assigned licences

Optional

- Updated the priority options
- Added custom fields
Top tip: although optional, custom fields give you a great opportunity to store key information about your suppliers
- Linked SIM Dojo custom fields
Top tip: for SIM Dojo users, lots of important data is already recorded during the onboarding process. Fields applied within the SIM module can be displayed in SRM Dojo to give you a clear picture of your suppliers
- Linked SIM Dojo questions
Top tip: When onboarding suppliers, there may be some questions that are absolutely critical. To ensure your SRM module is as powerful as possible, link your key questions to show supplier responses on their SRM record
- Added tags
Top tip: tags are searchable in your supplier list and can be used for filtering
- Linked SIM Dojo participant properties
Top tip: participant properties (tags) within SIM Dojo may be useful filters in SRM Dojo