

SVP**Strategic Value Plus**
STANDARD OPERATING PROCEDURE**Document:** SOP-SS-001**Version:** 1.0**Effective:** December 21, 2024

Supplier Search Standard Operating Procedure

This document outlines the standard operating procedure for using the Supplier Search feature in the Strategic Value Plus (SVP) Platform. The Supplier Search integrates with **ThomasNet** for supplier discovery and **Apollo.io** for contact enrichment.

Table of Contents

1. Supplier Discovery (ThomasNet)
2. Contact Enrichment (Apollo.io)
3. Apollo.io Pricing & Credit Costs
4. Best Practices
5. Troubleshooting
6. Appendix: API Endpoints

1. Supplier Discovery (ThomasNet)

1.1 Accessing Supplier Search

- 1 Navigate to **Portal** → **Supplier Search** in the SVP Platform
- 2 You will see multiple search options:
 - **AI Chat** - Natural language search
 - **All Suppliers** - Keyword-based search with region filter
 - **By Name** - Search by company name
 - **By Brand** - Search by brand name
 - **Product Catalogs** - Browse product catalogs

1.2 Performing a Search

- 1 Enter your search query (e.g., "CNC machining suppliers")
- 2 Select a region (optional):
 - All Regions
 - Northeast
 - Southeast
 - Midwest
 - Southwest
 - West
- 3 Click **Search All Suppliers**

1.3 Search Results

- Results are sourced from **ThomasNet.com**
- Each result includes: Company name, Description, Location, Link to ThomasNet profile
- Results can be saved to custom lists for later reference

1.4 Saving Suppliers to Lists

- 1 Click **Save to List** on any supplier card
- 2 Select an existing list or create a new one
- 3 Saved suppliers appear in the **Saved Lists** tab

2. Contact Enrichment (Apollo.io)

2.1 Overview

Apollo.io is used to find and reveal contact information (emails and phone numbers) for decision-makers at supplier companies.

2.2 Searching for Contacts

- 1 Navigate to **Portal** → **Apollo Search**
- 2 Enter search criteria:
 - **Keywords** (e.g., "Purchasing Manager")

- Company name
- Location
- Industry

3 Click **Search**

2.3 Revealing Contact Information

Email Reveal

- 1 Find a contact in search results
- 2 Click the **Email** button (envelope icon)
- 3 The system will:
 - First check Apollo's saved contacts (**FREE** - no credits used)
 - If not found, use `people/enrich` endpoint (**USES CREDITS**)
- 4 Email is displayed and saved to your list

Phone Reveal

- 1 Find a contact in search results
- 2 Click the **Phone** button (phone icon)
- 3 The system will:
 - First check Apollo's saved contacts (**FREE** - no credits used)
 - If not found, use `people/enrich` endpoint (**USES CREDITS**)
- 4 Phone number is displayed and saved to your list

2.4 Credit-Saving Strategy

The SVP Platform is optimized to minimize credit usage:

1. **Saved Contacts Check** - Before spending credits, the system checks if the contact was previously enriched
2. **Firebase Caching** - Revealed data is stored in Firebase, so re-accessing the same contact doesn't use additional credits
3. **Batch Operations** - Plan your enrichment to avoid duplicate lookups

3. Apollo.io Pricing & Credit Costs

3.1 Subscription Plans

Plan	Monthly (per user)	Annual (per user)	Mobile Credits/mo	Export Credits/mo
Free	\$0	\$0	5	10
Basic	\$59	\$49	75	1,000
Professional	\$99	\$79	100	2,000
Organization	\$149	\$119	200	4,000

Note: Email credits are unlimited on all plans (subject to fair use policy)

3.2 Credit Costs Per Action

Action	Credit Cost
View/Reveal Email	1 email credit (unlimited on paid plans)
Reveal Mobile Phone	1 mobile credit
Export to CRM/CSV	1 export credit
API Enrichment	1 credit per field revealed

3.3 Additional Credit Purchases

If you exceed your monthly allocation:

Credit Type	Cost
Per Credit	\$0.20
Minimum Purchase (Monthly)	250 credits (\$50)
Minimum Purchase (Annual)	2,500 credits (\$500)

3.4 Cost Examples

Scenario	Credits Used	Estimated Cost
Reveal 100 emails	0 (unlimited)	\$0
Reveal 100 mobile phones	100 mobile credits	Included in plan or ~\$20
Export 500 contacts to CRM	500 export credits	Included in plan
Reveal 1,000 mobiles (Basic plan)	1,000 - 75 = 925 extra	~\$185

3.5 Fair Use Policy

- **Free accounts (corporate email):** 10,000 email credits/month
- **Free accounts (personal email):** 100 email credits/month
- **Paid accounts:** Lesser of (\$ paid ÷ \$0.025) or 1 million credits/year

3.6 Important Notes

- **⚠ Credits expire** at the end of each billing cycle
- **⚠ No refunds** for unused credits
- **⚠ Seat reductions** not allowed mid-term
- **⚠ Credits are charged** even if data is incorrect or unavailable

4. Best Practices

4.1 Minimize Credit Usage

1. **Check saved contacts first** - The system does this automatically
2. **Use saved lists** - Avoid re-revealing the same contacts
3. **Batch your searches** - Plan enrichment campaigns in advance
4. **Prioritize high-value contacts** - Focus on decision-makers

4.2 Optimize Search Results

1. **Use specific keywords** - "CNC machining" vs just "machining"
2. **Add location filters** - Narrow results by region
3. **Include certifications** - "ISO 9001", "AS9100", etc.

4. **Specify company size** - Filter by employee count

4.3 Data Quality

1. **Verify contact info** - Apollo data may be outdated
 2. **Cross-reference** - Check LinkedIn profiles
 3. **Update regularly** - Re-enrich contacts periodically
 4. **Report errors** - Flag incorrect data in Apollo
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5. Troubleshooting

5.1 "Email/Phone Not Available"

Possible causes:

- Contact not in Apollo's database
- Data not yet enriched
- API key restrictions (some endpoints require higher-tier plans)

Solutions:

1. Try searching by LinkedIn URL
2. Check if contact exists in Apollo directly
3. Verify API key permissions

5.2 "API Inaccessible"

Cause: The `people/enrich` endpoint requires a paid Apollo plan

Solution:

- Upgrade to a paid Apollo plan
- Use the `contacts/search` endpoint for already-saved contacts (free)

5.3 Slow Search Results

Cause: ThomasNet scraping takes time

Solution:

- Wait for results to load (first search may take 5-10 seconds)

- Use more specific search terms to reduce result set

5.4 Missing Supplier Data

Cause: ThomasNet may block automated requests

Solution:

- Retry the search
- Use category-based search instead of keyword search
- Check ThomasNet directly for comparison

Appendix: API Endpoints Used

ThomasNet

- **Search URL:** <https://www.thomasnet.com/suppliers/search?searchterm={query}>
- **Method:** Puppeteer-based web scraping

Apollo.io

Endpoint	Purpose	Credits
<code>contacts/search</code>	Search saved contacts	FREE
<code>people/enrich</code>	Reveal email/phone	1 credit
<code>people/match</code>	Match by name/company	1 credit

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For questions or support, contact the SVP Platform administrator.

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