



## Strategic Value Plus

STANDARD OPERATING PROCEDURE

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# 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.

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## 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

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## 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. **Firestore Caching** - Revealed data is stored in Firestore, 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	<b>FREE</b>
<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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