



Document Request (invite)

Quick Guide

Table of Contents

Terms index.....	2
1 Introduction to Product Document Request (invite)	3
2 How does it work	4
2.1 Send an invite per technical file	4
2.2 Send an invite in Batch	5
3 What if?	5
3.1 My supplier does not see the Request?	5
3.2 My supplier does not accept the Request?	5
3.3 There is a new contact person for this supplier?	6
4 How to set it up.....	7
5 Communicate with your supplier	8
7 What does my supplier see.....	9

Terms index

MRD	= Market release date
WFS	= Workflow status
Doc. request	= Product document request (invite)
TCF	= Technical Construction File = technical file = file
Invite	= Product Document Request

1 Introduction to Product Document Request (invite)

On the Requirement tab you can find the required documents.

Some documents can be requested from your supplier. Using the invite function in the platform, you ask your supplier to upload the documents directly into the file.

Via an Invite, you connect a supplier to a file, not to your account. Your supplier can upload the documents directly into the file.

Your supplier will get an email.

He has to create an account, to follow up on the document request. There is no charge for that.

You can select which documents you want to receive from the supplier. If you do not select, all documents will be requested from those requirements that have not been fulfilled or declared not applicable.

Once a requirement is marked as fulfilled or not applicable, the related document will no longer be requested from the supplier and will not be shown on the requested document list on the supplier's site.

The system looks at the supplier's performance based on the data in the file. If multiple invites are present in a file or invites are removed, it displays incorrect data.

For this it is important to follow up correctly on the supplier's invitation

Function/ Purpose:

Request documents from your supplier in a traceable way.

Benefit:

When you request documents from the supplier through the platform, you can also assess the supplier's performance. You can track how long it took the supplier to upload the first document after receiving the invite and when they added the last document. This provides insight into the turnaround time for creating the file.

Once the documents are received, they become visible to all users on the account. If a document is sent via email, it will not be accessible to everyone; they will need to download and upload the document themselves.

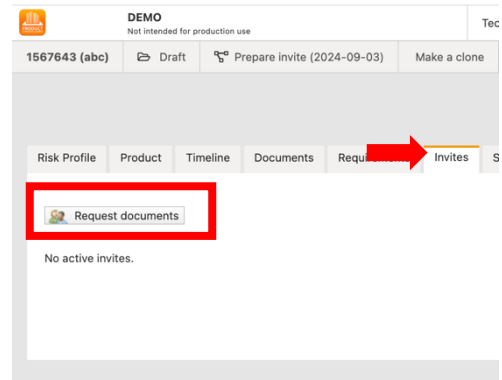
Through the platform, one can communicate with the supplier; this means that this communication is secured in the technical file and visible to everyone in the account.

2 How does it work

You can send an invite per the Technical file or in Batch.

2.1 Send an invite per technical file

- Open the TCF and go the invite tab
- Click on Request documents



When the supplier information is added to the Product Tab the information will be shown here. You can add the email address here.

select a template.

(see 4. How to set this up)

Or you can add here a message for your supplier.

- You can select the requested documents.

It is highly recommend requesting all the necessary documents at once and communicating with your supplier during onboarding that he should upload everything you have, and he will receive feedback on the missing documents.

- You can adjust the deadline of the request

This deadline is visible for the supplier.

The standard is set to 6 weeks from the invite date.

- Workflow status can be set automatically

[More information](#)

- Click on Send document request

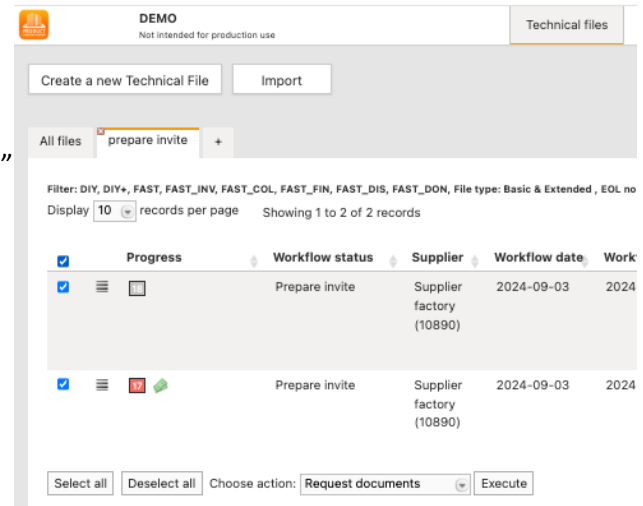
Your supplier will receive an email.

2.2 Send an invite in Batch

This can be done per supplier

- Select the technical files
- Scroll down and choose action “Request documents”
- Click on Execute

When sending out the invite in batch, you cannot
Make a requested document selection.



3 What if?

3.1 My supplier does not see the Request

To make this work, the invite must be sent to the email address your supplier is registered within the account.

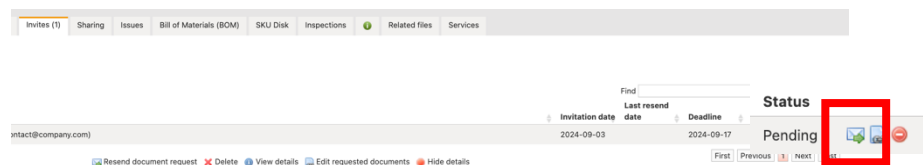
It is possible to register multiple users in one account, and all users will see all invites in the account.

3.2 My supplier does not accept the Request

Step one can be “resent the invite” via the system

This can be done in the file.

- Go to the invite tab
- Click on the envelope end of the line.



The email will be sent again.

If the invite is still not accepted (pending), you should contact the supplier.

- * check with the supplier if the used email address is correct.
- * ask whether they have encountered anything and why the task has not been followed up.

If the wrong email address is used and the invite is still pending, delete it and send a new invite to the correct email address.

When the supplier has problems with operating the system, ProductIP is the Helpdesk.

[Here](#), they can find more information and a guide on how to follow up on the request.

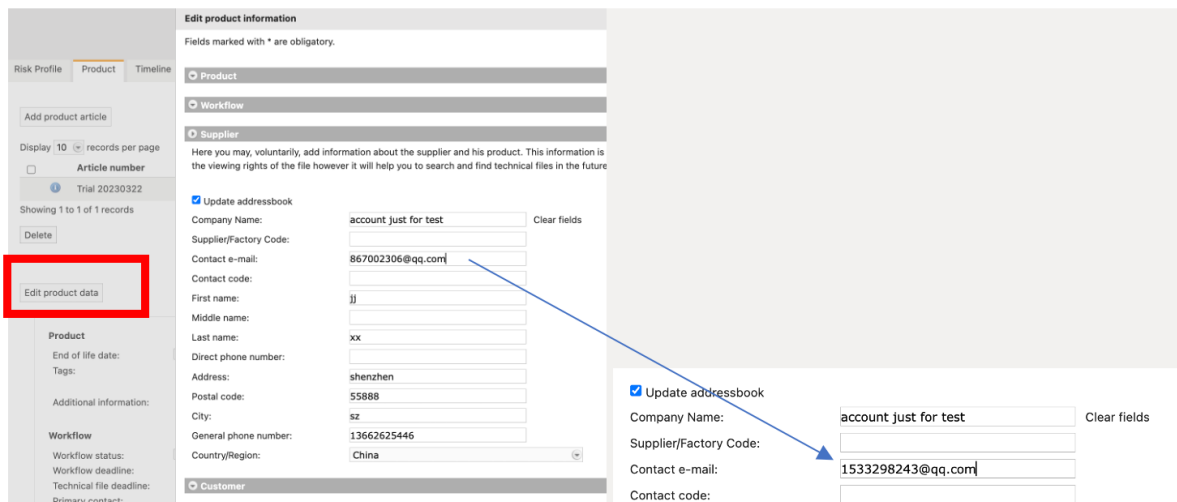
If this does not solve the problem he can send an email to helpdesk@productip.com

3.3 There is a new contact person for this supplier

Are you still working on the file, and there is a new contact person, who has to follow up on the upload of the requested documents?

1. The invite is still pending

- Update the supplier information in the file
- Go to the Product tab
- Click on Edit product data
- Update the information



- Delete the invite and send a new invite

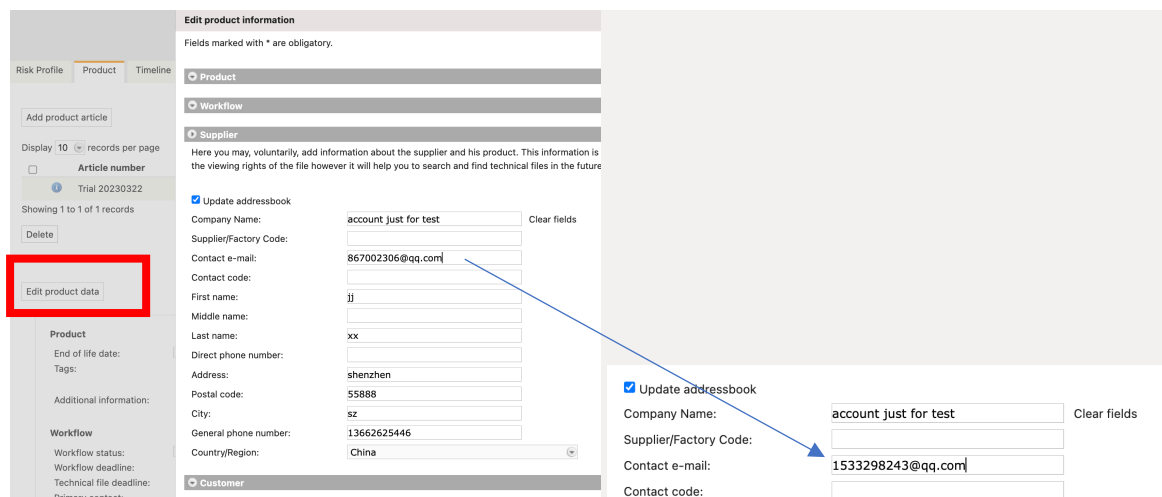
2. Invite is accepted

Don't send a new invitation. Update the email address in the file. This is crucial; otherwise, it will impact the supplier's performance data.

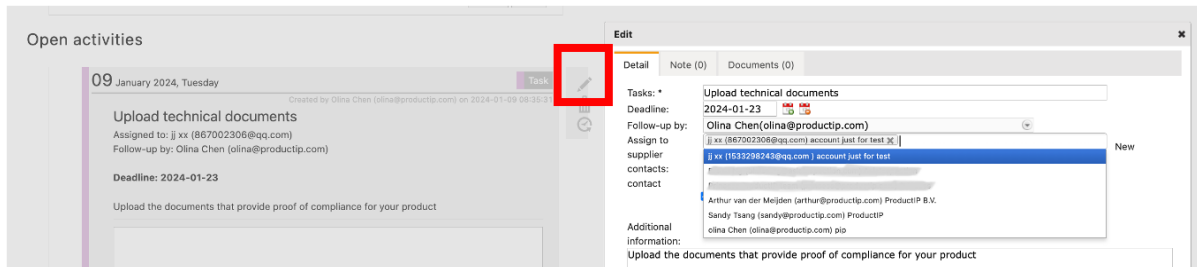
In the supplier's account, it is possible to add multiple users. All users can see all requests and follow up on them.

You must edit the email address in the upload task.

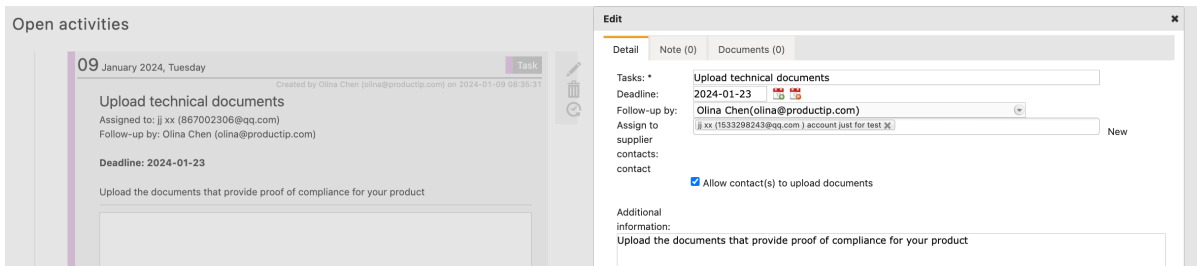
1. Change the contact details and replace the email with a new email address



2. Go the upload task in the Timeline:



3. Replace the old email address with the new one



If you add a new invitation, it will create an additional task in the file. On the supplier's upload page, two separate tasks will be visible.

4 How to set it up

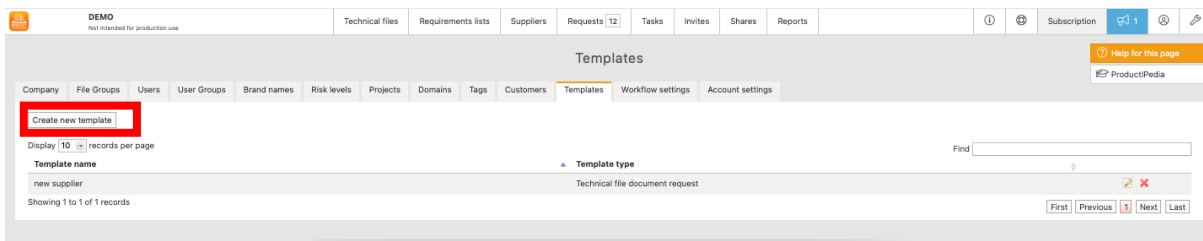
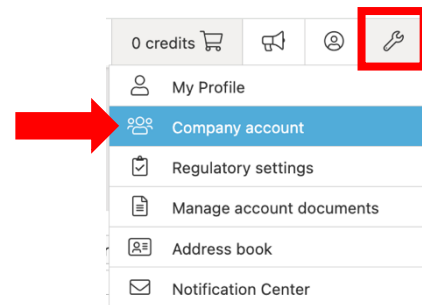
For the invite text you can add default options, so everybody is sending the same message.

You can add different messages for new and existing suppliers.

You can add for example per user a signature.

The admin of the account (or user with admin rights) can add these templates to the account.

- Select Templates
- Click Create new template



5 Communicate with your supplier

Once the supplier has accepted the invite, you can communicate with each other via the platform.

- Go to the Timeline tab
- Add your message, click “add comment”
- Your supplier will receive an email. This will also be visible on the site of the supplier.

The screenshot shows a navigation bar with tabs: Risk Profile, Product, Timeline (highlighted), Documents (24/19), Requirements, Invites (1), Sharing, Reviews, SKU Disk (1), and Assessment. Below the navigation bar is a filter control area with buttons for 'Add task', 'Add note', and 'Log activity'. It includes a filter section with checkboxes for 'Tasks', 'Communication', 'Notes', and 'File updates', all of which are checked. There is also a search input field with 'Search' and 'Reset' buttons.

Open activities

The screenshot shows an activity card for 'Upload technical documents' dated 14 November 2016, Monday. The card is marked as '38 days overdue' and 'Task'. It was created by user ProcutIP (training@productip.com) on 2016-11-14 14:02:41. The assigned user is saskia van orden (saskia@productip.com) and the follow-up user is user ProcutIP (training@productip.com). The deadline is 2016-11-28. The description says 'Upload the documents that provide proof of compliance for your product'. A comment box is highlighted with a red border, containing the text: 'please upload the rest of the documents, you can find the list on the upload page when you have clicked on the request'. Below the comment box is an 'Add comment' button and a note: 'Your comment will be sent to saskia van orden (saskia@productip.com)'. On the right side of the card, there are icons for edit, delete, and refresh.

Please note that if the invitation is not accepted, no email will be sent. Therefore, you cannot include a message here for your supplier to accept the invite. You will have to contact the supplier through a different method.

The screenshot shows an activity card for 'Upload technical documents' dated 11 January 2017, Wednesday. The card is marked as 'Invite pending!' and 'Task'. It was created by user ProcutIP (training@productip.com) on 2017-01-11 11:53:38. The assigned user is saskia van orden (saskia@productip.com) and the follow-up user is user ProcutIP (training@productip.com). The deadline is 2017-01-25. The description says 'Upload the documents that provide proof of compliance for your product'. There is an empty comment box and an 'Add comment' button below it. On the right side of the card, there are icons for edit, delete, and refresh.

6 Ask your supplier for more documents

The supplier has finished the task. However, there are missing documents. To resolve this, kindly reopen the task and leave a comment, and the supplier will be notified to re-upload the requested documents.

22 August 2016, Monday 77 days overdue Task

Created by user ProcutIP (training@productip.com) on 2016-08-22 14:57:34 , last update by Saskia van Orden on 2016-10-31 17:08:49

Upload technical documents (ready)

Assigned to: saskia van orden (saskia@productip.com)
Follow-up by: user ProcutIP (training@productip.com)

Deadline: 2016-09-05
Upload the documents that provide proof of compliance for your product

Please check the new Task not all necessary documents has been uploaded yet - user ProcutIP, 2 months ago

Re-open activity

Your are about to re-open the activity.
Please enter any instructions for the person(s) responsible for this activity:

add your message here, your supplier will receive an email

Re-open Cancel

7 What does my supplier see

[Here](#) you can find the guide for your supplier.

The requested documents will be shown on your requirement tab with a blue background.

Requirement	Status	Category
Product construction - Bill of Materials, Substances (BOM, BOS) of the product (1)	0/1	B3
Product Identification - Declaration of Product Identity (0)	0/1	B3
Product Identification - Declaration of Product Identity of packaging (0)	0/1	B3
Product Identification - Picture, artwork of Packaging (0)	0/1	B3
Product Identification - Pictures, artwork (0)	0/1	B3
Traceability - Production Batch code (0)	0/1	B3
General Product Safety Directive (GPSD) 2001/95/EC (0/2)	0/2	A
ASTM D1292 (0)	0/1	A

On the supplier side, it will look like this: When they put their mouse on a requested document name, a screen pops up with more information. On the right side, they can see that there are templates and more information available for the document.

Requested documents

Upload documents | Select documents from an existing technical file

Requested documents (view the information this list is based on)

Show 7 entries

Document	Status	Classification	Resources
Bill of Materials (BOM)	not received	B3	
Chemical Substances - Declaration	not received	B1	1
Chemical Substances - Test report	not received	B1	1
EU Declaration of Conformity (DoC)	not received	DOC	7
Pollutants (POP) Regulation - Test report	not received	B1	2
- Artwork	not received	B1	4
ent System - Audit report	not received	B3	

Document information: : Pollutants (POP) Regulation - Test report

Available resources:

- Compliance Clip 600 Child appealing products (Download)
- TIE_factsheet_DoC_TSD_en.pdf (Download)
- Toy Safety Directive - Explanatory Guide (Chinese) (Download)
- Toy Safety Directive - Explanatory Guide (English) (Download)
- Toy Safety Directive - Official Journal 2015-11-13 (Download)
- TSD_2009_48_corr_20131231.pdf (Download)
- TSD_2009_48_en.pdf (Download)

Requirements:

DoC - CE - TSD Toy Safety Directive 2009/48/EC
 EU regulation on Toy Safety, TSD, Directive 2009/48/EC.

The supplier can see the status of the document:
 The supplier can only see the documents he has uploaded.
 Once you change the status, it cannot be deleted anymore

Uploaded documents

Show 7 entries

Status	Document	Document category
checked	P1.png	Select
pending	P123.png	
unchecked	02 - tags .png	Select Add details

When reviewing the document in your technical file and adding a status note, it will be visible to the supplier.

Back to documents | Match It!™ to requirements | Edit metadata | Edit status | Add note | Article list | Synchronise | Add issue

BSCI_Golden_1 (1).pdf | page 1 of 13 | Zoom 100% | DPI 150 dpi | Redaction tools

Edit status

BSCI_Golden_1 (1).pdf

Status: Rejected

Do not send a notification e-mail to the uploader

Remark:
 This document is no longer valid; please upload the latest audit report