ProductIP
create · manage · share

Follow up on a technical file request

Quick Guide

A WORLD IN WHICH PRODUCTS CAN BE TRUSTED

Contents

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1 Introduction to File Request

Through the platform, your customer may request you to create and share a file. In order to create the technical file, you must have an account on ProductIP and either a subscription or the option to purchase credits. It is also possible for your customer to cover the cost of creating the technical file. You create the technical file yourself, upload and link the documents, and share the completed file with your customer.

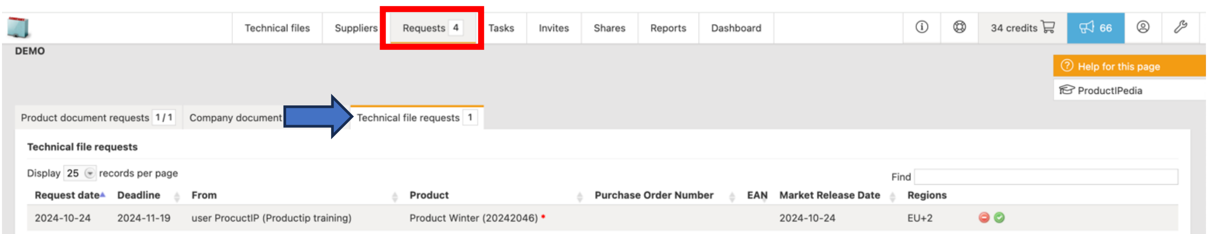
2 How does it work

2.1 You will receive an email

Your customer will send you a file request, and you will receive an email about this.

> **Dear supplier name ,**
>
> I'm requesting you to share a technical file for our product **Product Winter (20242046)** using **ProductIP**.
>
> ProductIP is an internet expert system for creating, managing and sharing technical compliance files.
> If you already have an account you can login at https://secure-demo.productip.com
> If you do not have an account yet you can register at https://secure-demo.productip.com/registration
>
> With kind regards,

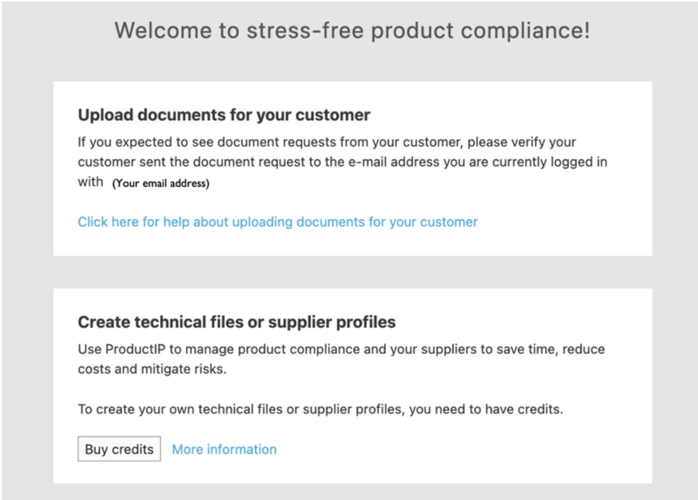
In this email, you find the link to log in or to create your account.
You will find the technical file Request under Request in your account.



2.2 What if you don't see a request in your account

There are three scenarios:

1. When you see this screen, then the email requesting to share the technical file has not been sent to your email address.
   And in your account, there is no previous requests or technical files present



<u>Two options to solve this</u>

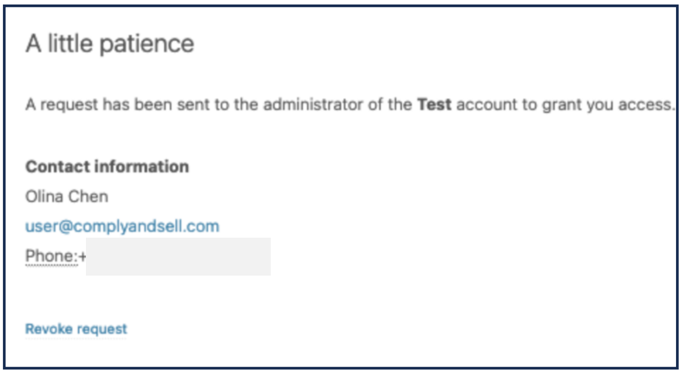
⇨ Ask your customer to use your email address for the technical file request so you can see the requests immediately.

OR:

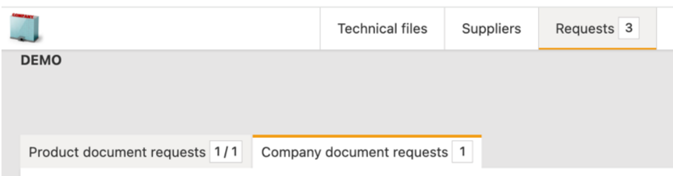
⇨ Add the email address which received the email to the account, the requests will be visible to all users

See <u>here</u> how to add a new user

2. When you see this screen, you have registered, and there is already an account with your domain.
   ⇨ You need to wait until the account admin approves and adds you to the account. The admin receives an email.
   You can contact the admin



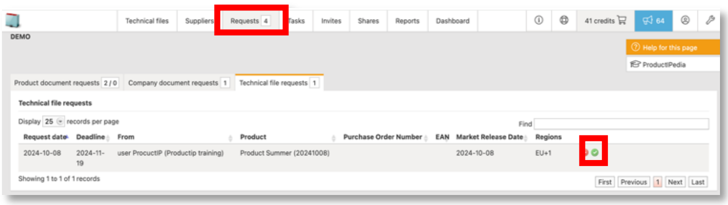
3. You don't see the "technical file request" tab on the request page.
   ⇨ Your customer has used the wrong email address.
   Check with your customer which email address is used to send the request.
   If this is not your email, your customer can change the email address to your address and send the request again, or the account admin can add the user with that email address
   Click <u>here</u> for more information "how to add a user"



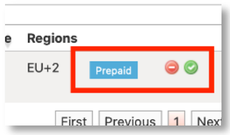
2.3 Accept the request

When you see the red banner, it means you need to upgrade your account to be able to create the technical file. Just click "upgrade to corporate account" (there are no costs involved).

When you can see multiple tabs, select the "Technical File Request" tab.
Review the information of the article, if all is OK you can accept the request.
Click the icon to accept.

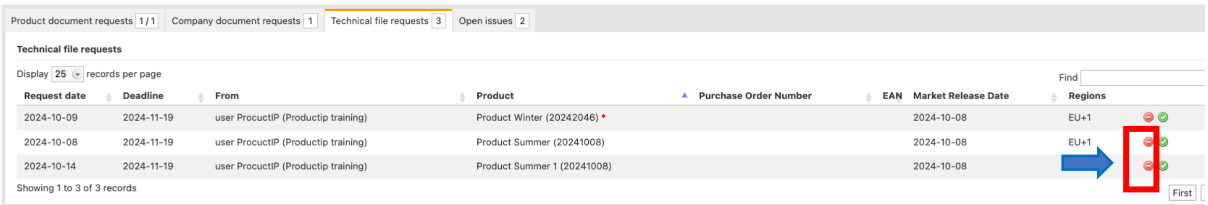


If your customer has paid for the technical file, you will see "prepaid".
Otherwise, you have to buy credits to create the technical file.

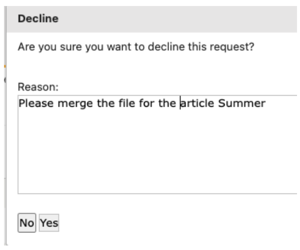


2.4 Decline the technical file request

In the example below, you see two requests for the product “Summer.” You, as the supplier, have all knowledge about the product.
There are some restrictions for this.
- Same supplier
- Same material
- Same list of Requirements (function)
- Same documents



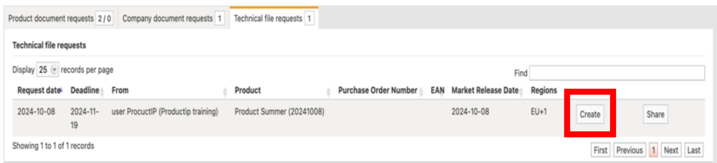
If the articles can be merged, you should decline the request and ask your customer to merge them.
Articles can be merged into one technical file.
Once you have declined the request, you will no longer see the request on your side. Your customer must resent the request.



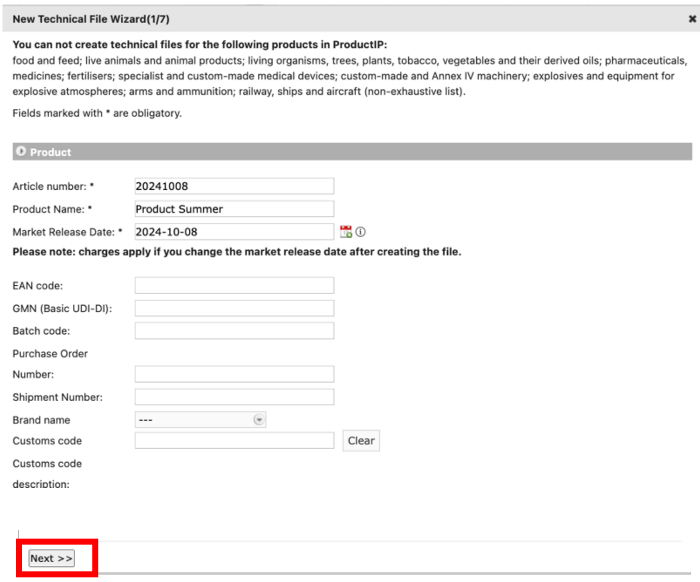
2.5 Create the technical file

- Click “Create”

(If you already have a technical file, you don’t have to create a new technical file. You can share the existing file. See 2.6)



- Please follow the wizard to create a technical file.



Your customer may already have provided some information, which you can supplement using the wizard. If you include the supplier's information, it will not be shared when you send the technical file to your customer.
After completing the wizard, the file will be created, and you must finish it before sharing. You need to upload documents and link them appropriately. For more **information on how to complete a technical file, use this link.**

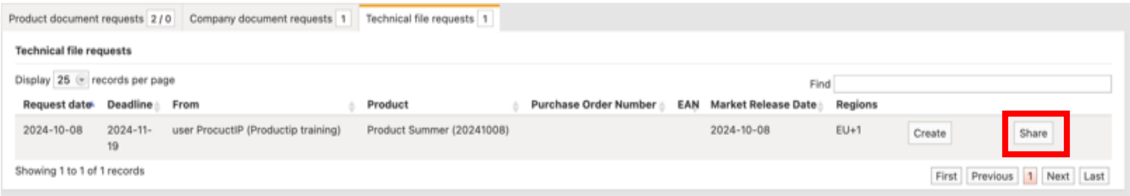
2.6 Share the technical file

!! Don't use the share button on the share tab in the technical file. Follow the steps below to share the technical file requested with a technical file request.

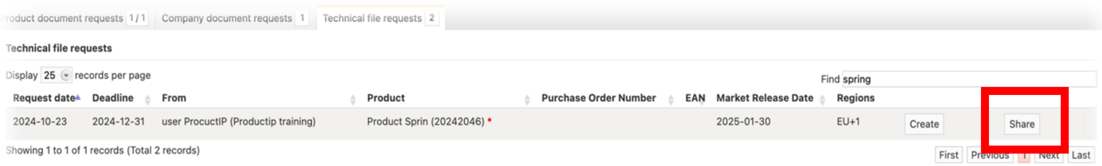
2 options

1. You have created the technical file via the Create button from the technical file request.

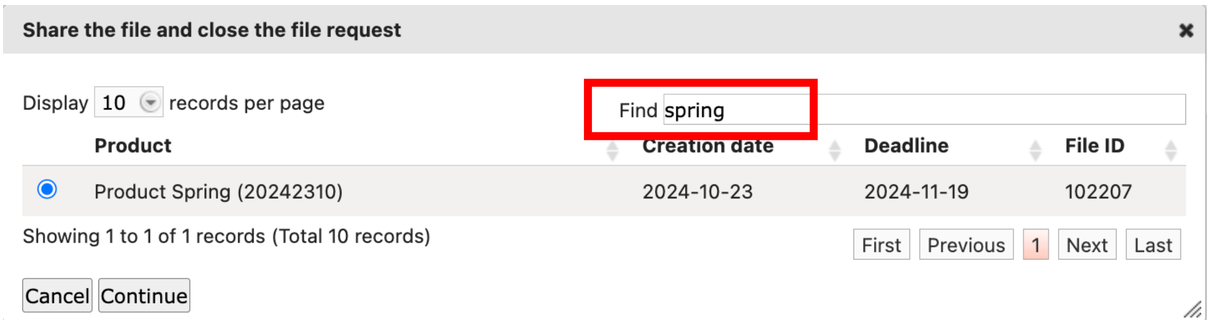
- Click on the Request tab on the "Share" button



2. If you already have a technical file, you don't have to create a new file, you can share the existing file.



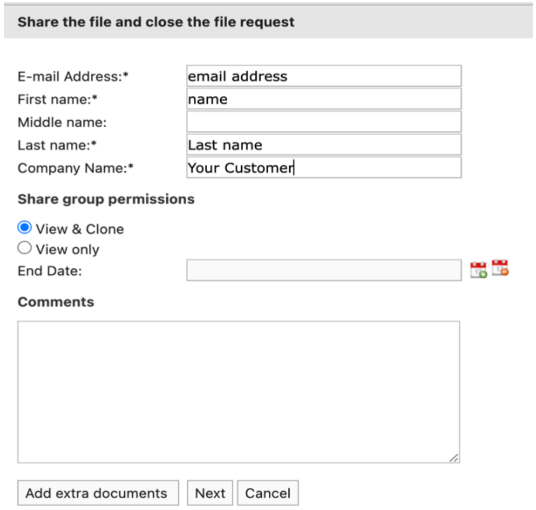
- In Find you can search for the technical file.



The email address will already be filled out.

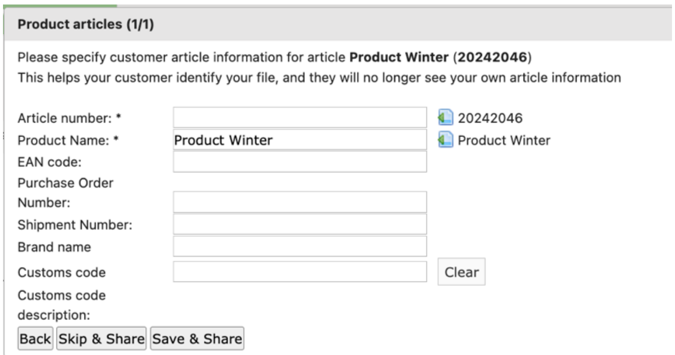
For a file request, you have to set the share permission to "view & clone," which allows your customer to make a copy of the technical file and store it in their own account.

With “view only,” the receiving party can only look at the technical file. They are not allowed to download the shared documents, and after the end, the technical file is no longer accessible.



When you have created the technical file with the product data of your customer, you can click “Skip & Share”. The information in the file will be shared

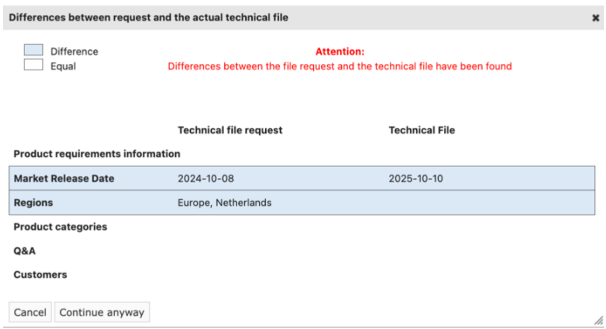
If you have your own article information in the technical file, you must add your customer's article information here. Add the information and click “Save& Share”



The system will show you this when the information in the technical file is not the same.

You can share the technical file anyway or adjust the technical file

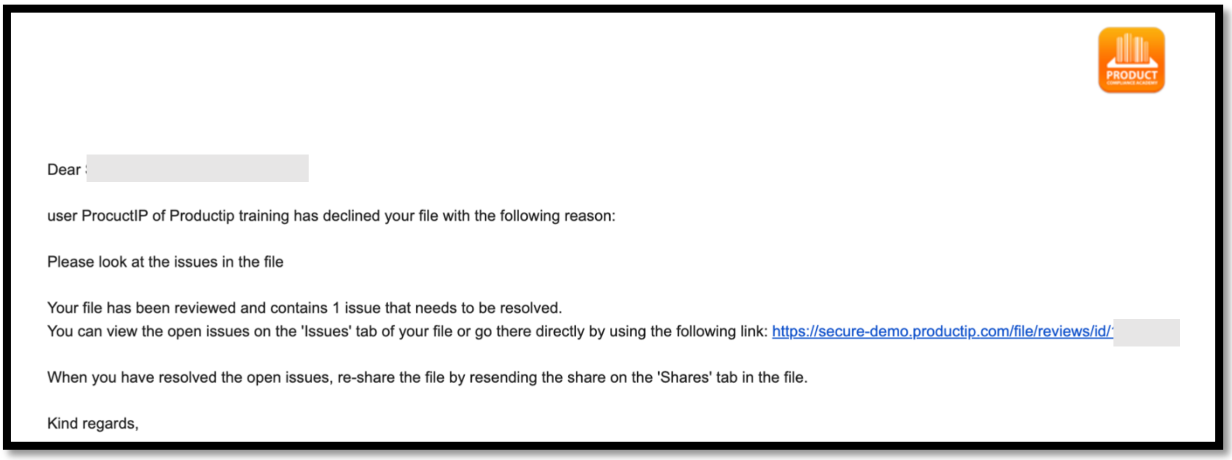
See what if 3.4



Once the technical file is shared, your request will no longer appear in the request tab. Your customer will review the shared technical file and decide whether to accept or decline it.

2.7 The technical file is declined

You will receive an email when your customer doesn't accept the file.



Dear

user ProcuctIP of Productip training has declined your file with the following reason:

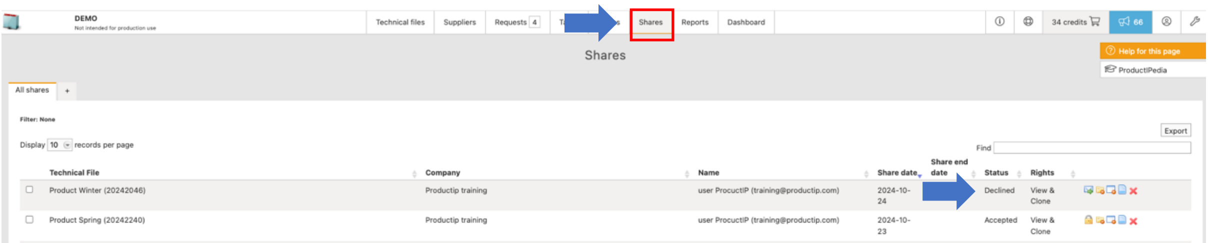
Please look at the issues in the file

Your file has been reviewed and contains 1 issue that needs to be resolved.
You can view the open issues on the 'Issues' tab of your file or go there directly by using the following link: https://secure-demo.productip.com/file/reviews/id/

When you have resolved the open issues, re-share the file by resending the share on the 'Shares' tab in the file.

Kind regards,

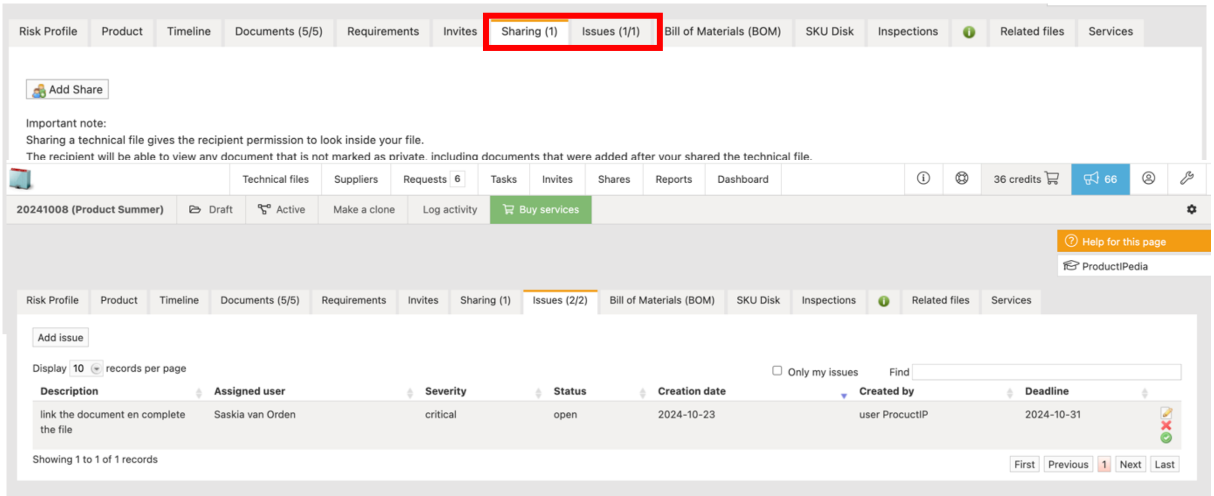
Your customer has rejected your file, and You can find the status of the share in your account on the "Share" tab



Click on the Technical file to open it. The issue our customer has added to the technical file can be found.

You have to share the technical file again when you have solved the issue.

Click on the icon to re-share the technical file.



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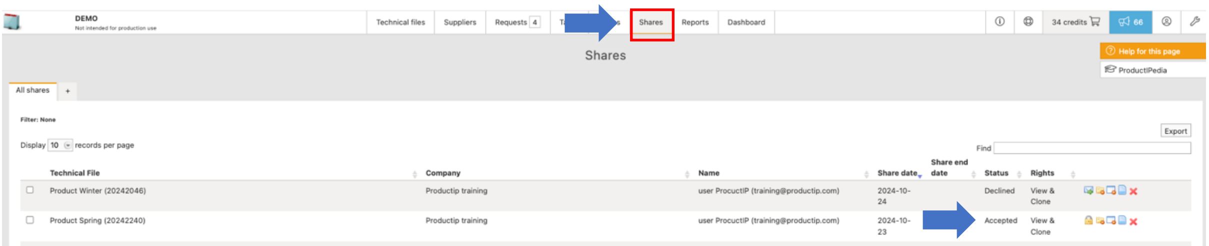
2.8 The technical file is accepted

You will receive an email, and you will find it in the status of the technical file.

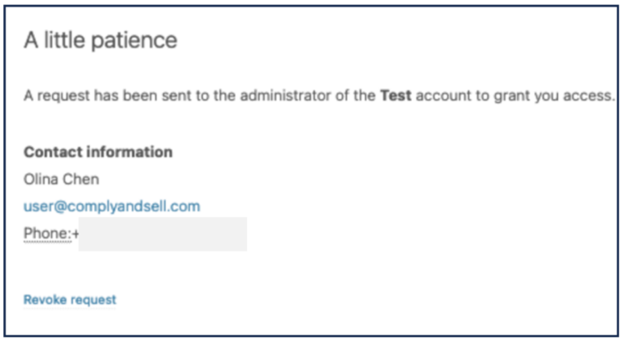


3 What if

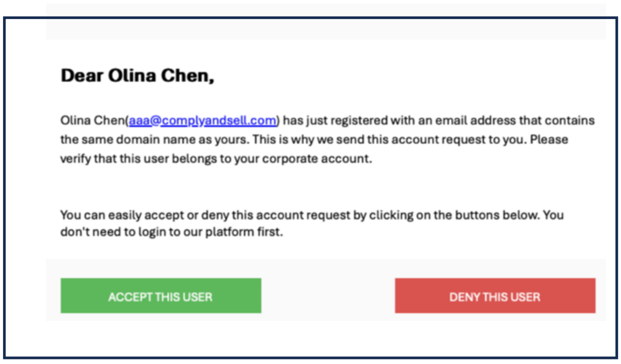
3.1 I don't have an account in ProductIP

To create a company account you can register this with the link in the email.
Or you can use this [link]

When you register yourself, but it seems that there is already an account, you will see this message.
You must wait until the account admin grants you access.



The admin will receive this email.

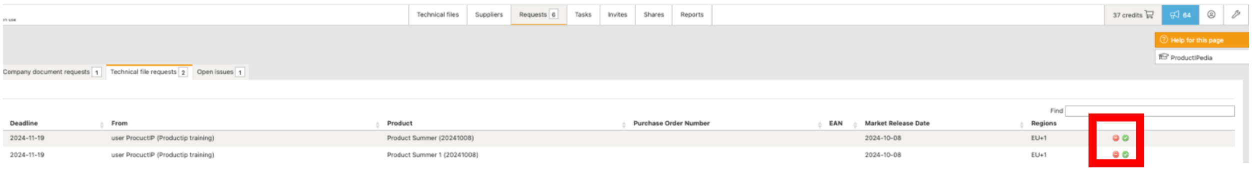


It is important that the email the technical file request is sent to is also registered in the account. The account admin can add multiple users to the account. All Requests will be visible to all users.

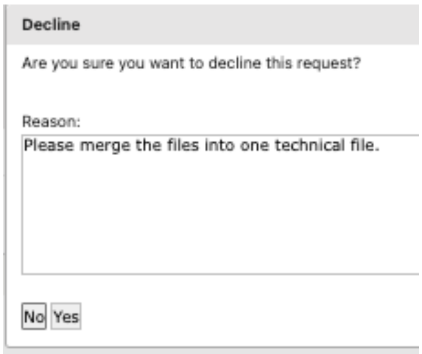
3.2 I receive multiple requests for the same article

It is possible that those articles could have been merged into one file when you receive multiple requests.

Decline the request



And ask your customer to merge the articles.
You cannot merge the articles yourself.
After you have declined the file, your customer has to resent the request.



3.3 I have already a technical file in my account, but I don’t see the Request

Check with your customer which email address is used to send the request.
If this is not your email, your customer can change the email address to your address and send the request again, or the account admin can add the user with that email address
Click here for more information “how to add a user”

3.4 What shows compare

The system will show you this information when the information in the technical file is different from the information in the request.
This is important information because differences can lead to not accepting the shared file.
This information determines which requirements are applicable to the product.

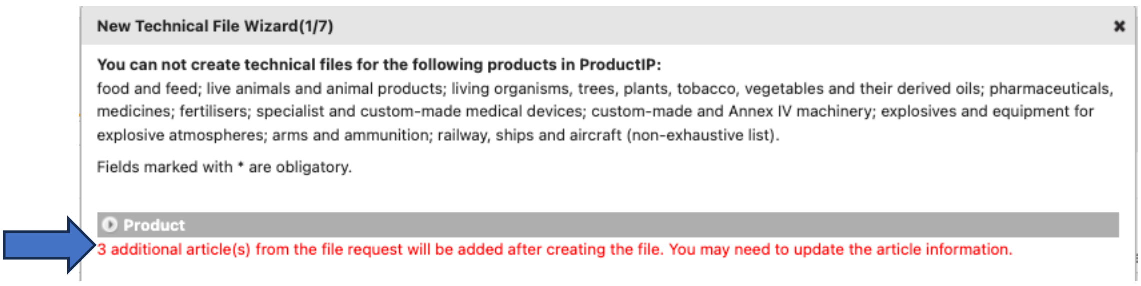
3.5 You want to share a prepaid file request with another company

If it's a prepaid file request, the cost of creating the file is covered by your customer, which means you can only share the file with them. If you want to share the file with other companies, you can create a clone of the technical file and share that with anyone else.

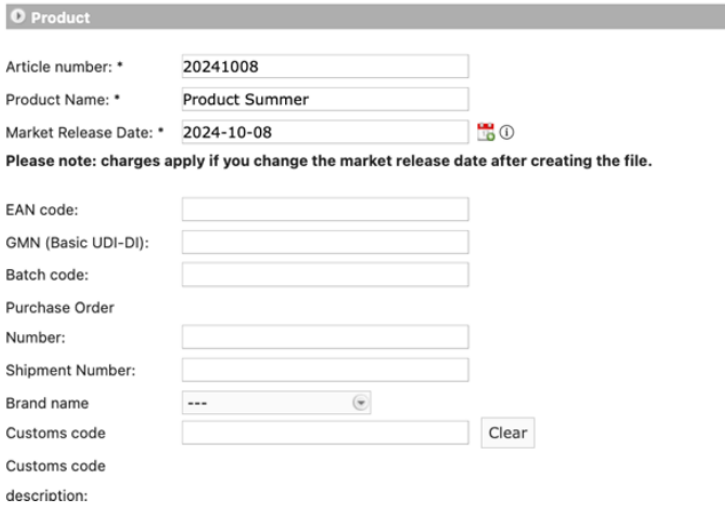
3.6 The information in the the pre-draft is not correct

You can decline requests and add remarks. Your customer can adjust the information and resend the request.

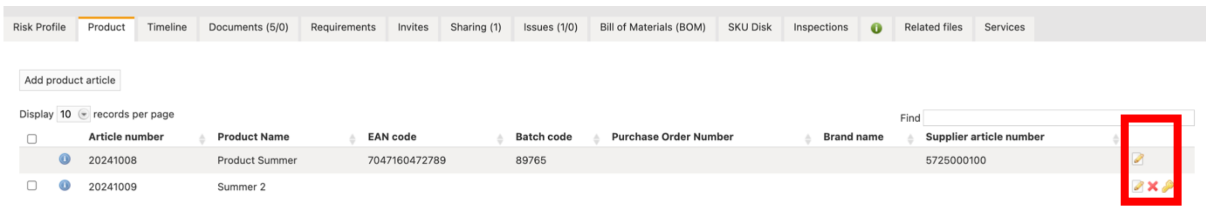
3.7 I see the notification “update article information”



The file is created with the information of the first article, once you have finished the wizard and created the file, the merged articles will be visible in the technical file.
When you create the technical file, you can add information for the first article



With the pencil at the end of the article line you can edit the product data.



3.8 I need help

When you have to contact your customer if you have questions like:

- Why do I have to create and share the file
- The article information is not correct
- Articles are merged but you produce them in separate factories
- Questions about the decline of the file

You can contact ProductIP via helpdesk@productip.com when you need help operating the system.

3.9 Where can I find more information and explanation?

If you need more information about the platform and ProductIP you can find it on ProductIPedia