



Address book

Quick Guide

Contents

1	Introduction	3
	Overriding Import Data when importing technical files:	3
2	How does it work	3
2.1	There are three ways to add a supplier.....	3
3	Cleaning up the address book.....	5
4	Automatic completion of supplier information based on indicating supplier code at the upload ..	7
5	Add default contact person	8
6	Tip	8
6.1	Adding contacts to a technical file (or pre-draft)	8
7	What if	9
7.1	You see white as a choice.....	9

1 Introduction

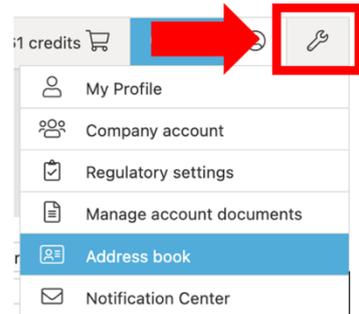
A well-organized address book is crucial for collecting accurate information. It's not uncommon for companies to have different contact persons, so having clarity on who to contact for compliance documents can make the process smoother and more efficient. Whenever you add supplier information to a technical file, it is automatically stored in the address book.

Important: Every supplier entry must have a **unique supplier code**.

Using Excel Imports;

If you import article data using an Excel file, the supplier details included in that file are also added to the address book.

By default, the imported supplier data and the address book are not linked. However, once your address book is complete and accurate, you can choose to activate the link manually.



Once this link is active:

- You only need to provide the supplier code in your import file.
- The system will automatically pull the supplier's address details from the address book.
- You can also assign a default contact person in the address book. Their contact info will be included in each import that uses their supplier code.

Overriding Import Data when importing technical files:

- The system will replace any supplier details in the import file with the ones stored in the address book.
- This only works if there is exactly one matching entry per supplier code in the address book.
- Your import file must contain the correct supplier code for each supplier.

Advantage:

- A quick way of adding supplier data to a technical file
- Data can be used for reporting purposes
- Ensuring the right choice of contact person

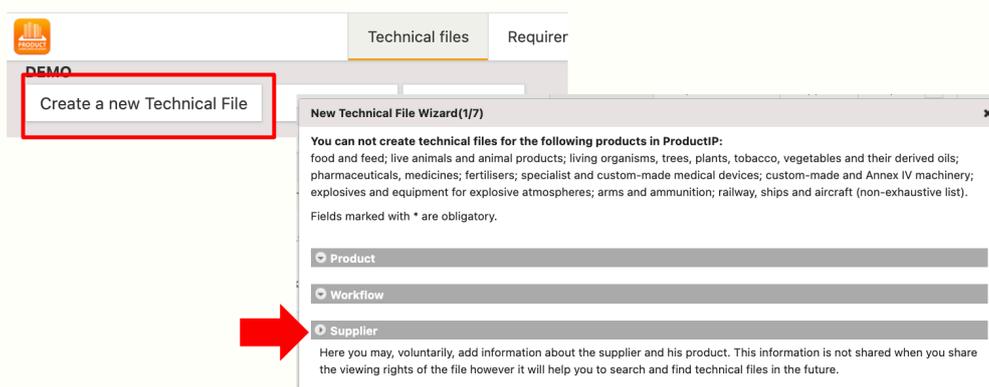
2 How does it work

2.1 There are three ways to add a supplier

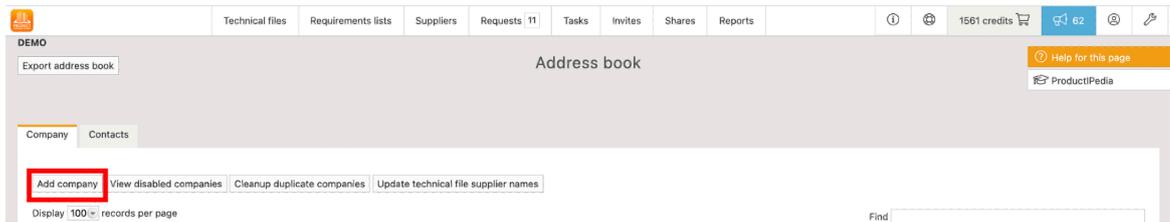
1. When creating a technical file, via the "Create Technical file" button, and the supplier data is entered there, they are added to the address book
2. Add manually to the Address Book
3. Via the import option

More explanation:

1. Enter supplier details when creating the file. These are automatically added to the address book



2. Add in the Address Book:



3. Import via Excel

If you do not have article data and want to import the supplier data, you can also use the Excel import.

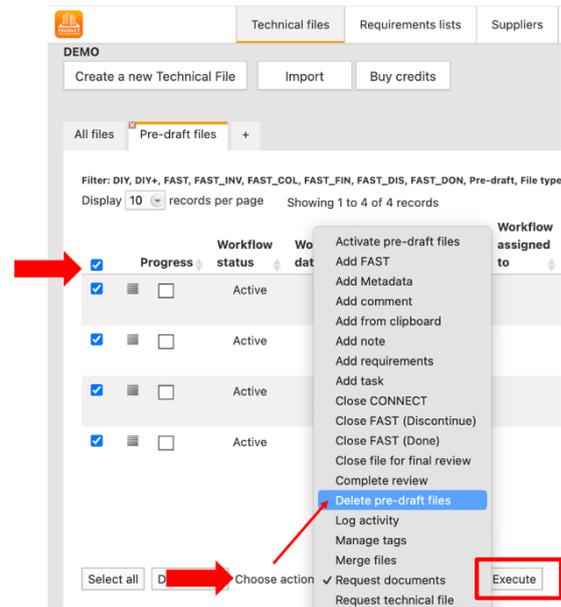
- Click on "import"
- Download the Excel template



- Fill in dummy data in column A and B and then all supplier data.

A	B	AC	AD	AH	AI	
Article number	Article name	Supplier name	Supplier code	Supplier address	Supplier zipcode	Supplier
1	a					
2	a					
3	a					

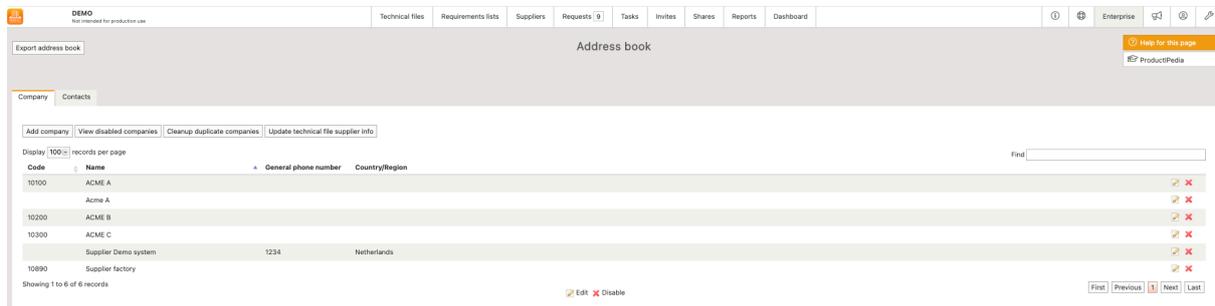
- Remove the newly created pre-drafts from the “dummy” articles.



3 Cleaning up the address book

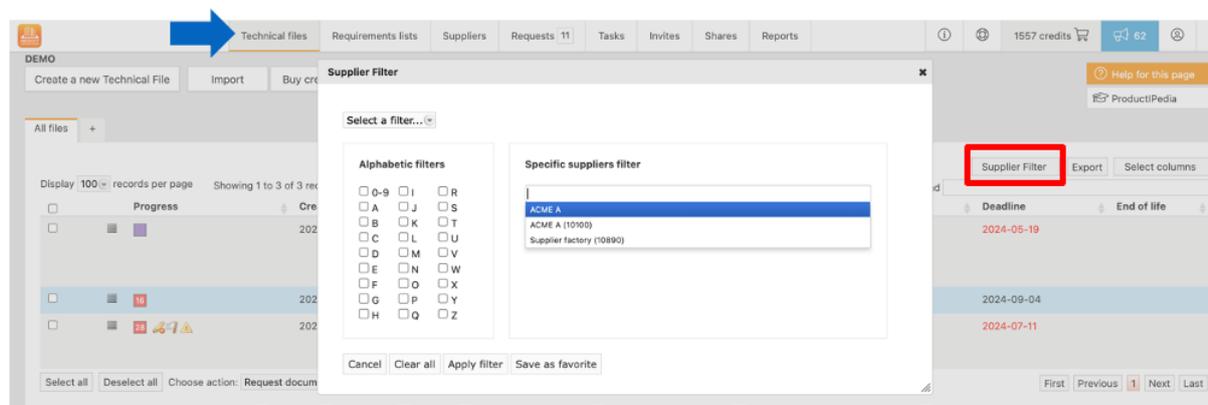
Go through the following steps:

- Step 1:** Check the address book to see if all suppliers have a supplier code. And if it is missing, add it here.
- Click on the pencil on the left to add it

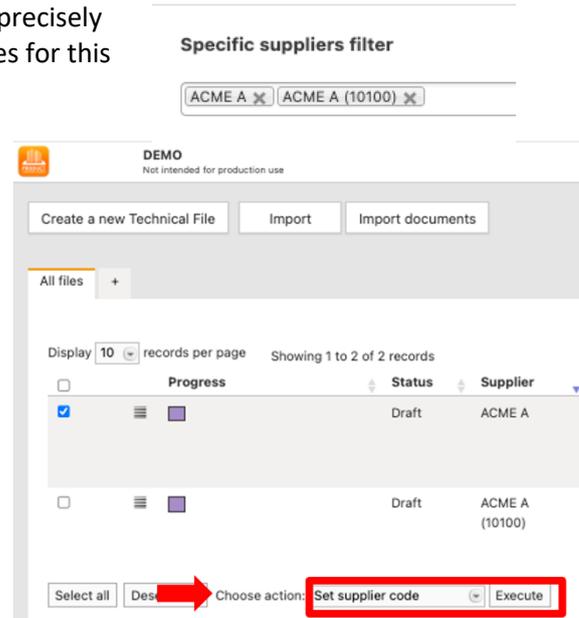


Step 2: Make sure that all suppliers in the file have a supplier code

- Go to Technical file overview
- Filter per supplier without a code

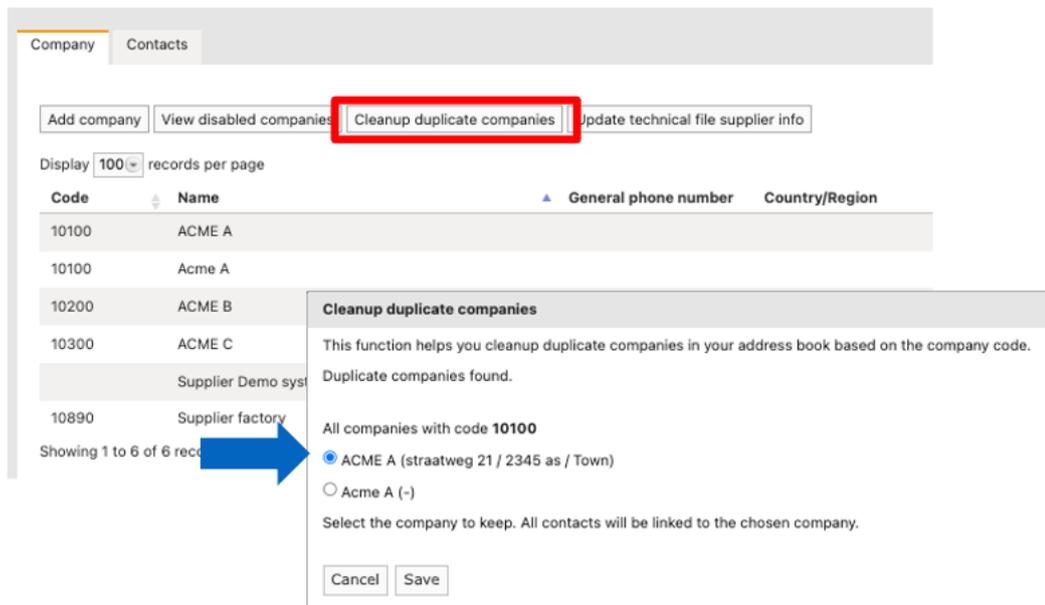


- The system will also add the suppliers with precisely the same name as the code and show all files for this supplier.
- Select the files where you want to add the code
- Choose "Set supplier code"
- Click "Execute"
- Add code



Step 3: Clean up the duplicate info
Go to Address Book

- Click "Cleanup duplicate companies"
- Select the info you want to keep
- Click Save
- Continue till there is nothing to cleanup



Step 4: Update the information in the technical file

- Click "update technical file supplier info"

Company Contacts

Add company View disabled companies Cleanup duplicate companies **Update technical file supplier info**

Display 100 records per page

Code	Name	General phone number	Country/Region
10100	ACME A		
10200	ACME B		
10300	ACME C		
	Supplier Demo system	1234	Netherlands
10890	Supplier factory		

- The system now shows the information where the code is the same, but a different name is displayed

Update technical file supplier info

The address book contains a record for supplier **ACME A** with supplier code **10100**. Some of your technical files for this supplier code contain a different supplier name. Choose the names you want to update.

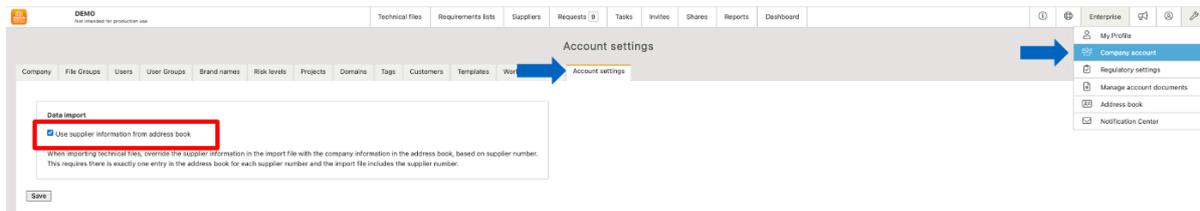
ACME

Close **Update** Skip

- Select this
- Click on Update, all technical files with the same supplier code will now get the same supplier information

4 Automatic completion of supplier information based on supplier code in the import file

After cleaning up, this button can be turned on in the account and the system will override the supplier information in the upload excel with the data in the address book.

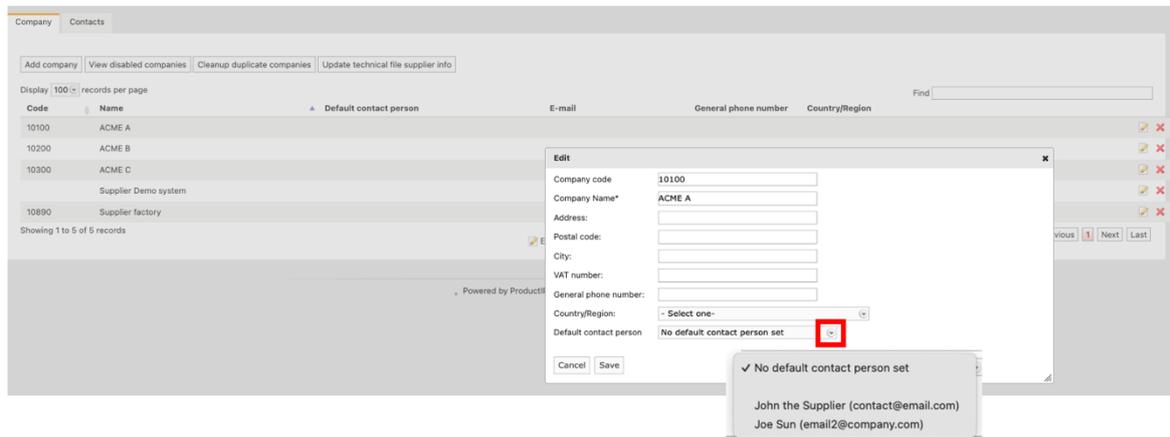


- Go to control panel
- Select Company account
- Choose Account settings
- Tick
- Click Save

5 Add default contact person

When you have added the Default contact person to the company, this information will also be automatically added with the import.

- Click on the pencil to edit the company data
- Add the default contact person
- Click save



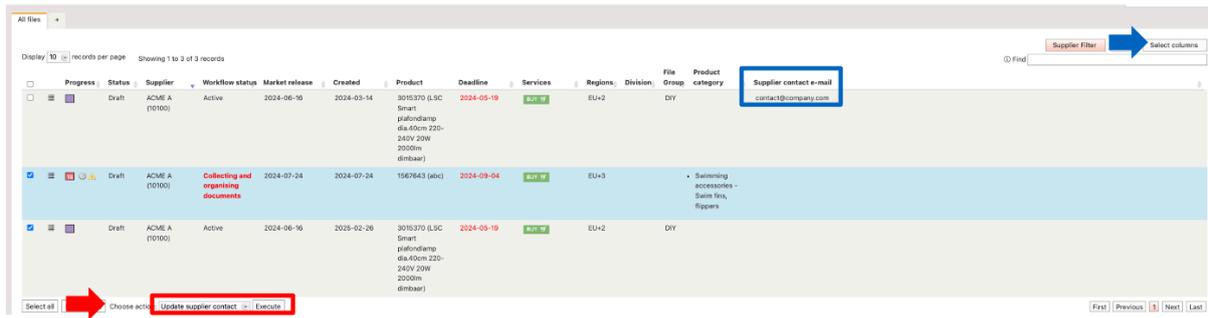
6 Tip

6.1 Adding contacts to a technical file (or pre-draft)

If the default person was not set and there are pre-draft / draft files without the contact details of the supplier, you can add this in batch. Adding the right contact person is important, so that this person will receive the document or technical file request.

1. With the button on the right, "Select columns", you can add the email address. This helps you to see where the supplier email is missing
2. Select the files where you want to add the contact details

(tick the boxes at the front of the files)



- Choose "Update supplier contact"
- Click Execute

7 What if

7.1 You see white as a choice

Update technical file supplier info

The address book contains a record for supplier **ACME A** with supplier code **10100**. Some of your technical files for this supplier code contain a different supplier name. Choose the names you want to update.

<blank>

Close Update Skip

- It turns out that there is a file without supplier information that appears to have a supplier code.
- Check it on the Technical file tab and the system will add the correct supplier details