

Address book

Quick Guide

Contents

1	Int	roduction	.3
	Ov	verriding Import Data when importing technical files:	.3
2	Но	ow does it work	.3
	2.1	There are three ways to add a supplier	.3
3	Cle	eaning up the address book	.5
4	Au	tomatic completion of supplier information based on indicating supplier code at the upload	.7
5	Ad	ld default contact person	.8
6	Tip)	.8
(5.1	Adding contacts to a technical file (or pre-draft)	.8
7	W	hat 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

 \frown



PRODUCT	Technical files Requirer	
DEMO		
Create a new Technical File	echnical File Wizard(1/7)	×
You ca food a pharm explos Fields	In not create technical files for the following products in ProductIP: nd feed; live animals and animal products; living organisms, trees, plants, tobacco, vegetables and their derived oils; aceuticals, medicines; fertilisers; specialist and custom-made medical devices; custom-made and Annex IV machinery; ives and equipment for explosive atmospheres; arms and ammunition; railway, ships and aircraft (non-exhaustive list). marked with * are obligatory.	
© Pro	oduct	L.
O we	rkflow	
O Su	pplier	
Here the v	you may, voluntarily, add information about the supplier and his product. This information is not shared when you share iewing rights of the file however it will help you to search and find technical files in the future.	
Add in the Address Rock:		

2. Add in the Address Book:

	Technical files	Requirements lists	Suppliers	Requests 11	Tasks	Invites	Shares	Reports		(1)	٢	1561 credits 员	∰ 62	0	ß	
DEMO Export address book				Ac	dress	book							Help for the second	Help for this page Product/Pedia		
Company Contacts													io riduciri	2010		
Add company View disabled companies Cleanup duplicate companies Update technical file supplier names Display 100 erecords per page Find																

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

RCOULT	Technical files	Download the Excel template
DEMO Create a new Technical File	Import	Excel file: Choose file No file chosen Data will be imported into the account of Productip training Import

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

A	В		AC	AD		AH	AI	
Article number	Articlename	Mar	Supplier name	Supplier code	Supplie	er address	Supplier zipcode	Supplie
1	а							
2	а							
3	а							



_

Technical files Requirements lists Suppliers Remove the newly created pre-drafts DEMO from the "dummy" articles. Create a new Technical File Import Buy credits All files Pre-draft files + Filter: DIY, DIY+, FAST, FAST_INV, FAST_COL, FAST_FIN, FAST_DIS, FAST_DON, Pro -draft, File type Display 10 💽 records per page Showing 1 to 4 of 4 records Activate pre-draft files Workflow Wo assigned ~ Progress status dat Add FAST to Add Metadata Active Add comment Add from clipboard ~ Active Add note Add requirements Add task

≡ □

Select all D

Active

Active

Close CONNECT Close FAST (Discontinue)

Close FAST (Done) Close file for final review Complete review Delete pre-draft files Log activity Manage tags Merge files

Choose action ✓ Request documents Request technical file Execute

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

111 Anna	DEMO Not intended for production use		Technical files	Requirements lists	Suppliers	Requests 9 Tasks	Invites	Shares	Reports	Dashboard		0	C Ente	prise g	1 @	0 0
Export addres	i book					Address bo	ok							() Help	for this pa	age
														18 Produ	uctiPedia	
Company	Contacts															
Add comp	ny View disabled companies Cleanup duplicate con	update technical file supplier in	nfo													
Display 10	e records per page										Find					
Code	Anne Name	 General phone number Co 	untry/Region													
10100	ACME A														2	×
	Acme A														2	×
10200	ACME B														21	×
10300	ACME C														2	×
	Supplier Demo system	1234 Net	therlands												2	×
10890	Supplier factory														2	×
Showing 1 t	6 of 6 records					🖉 Edit 🔀 Disable							First	revious 1	Next	Last

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

		Technical files	Requirements	s lists Suppliers	Requests 11	Tasks	Invites	Shares	Reports		í	1557 1557	credits 🛱	₽\$ 62	8
DEMO Create a n	ew Technical File	Import Buy cre	Supplier Filte	r						×			0	Help for th	is page
All files	+		Select a f	ilter@									Ê	ProductiPe	dia
Display 1	00 e records per page	Showing 1 to 3 of 3 rec	Alphab	etic filters	Specific sup	pliers filte	r				id	Supplier Filt	er Export	Select o	olumns
0	Progress	Cre 202		□ J □ S □ K □ T □ L □ U □ M □ V □ N □ W	ACME A ACME A (1010 Supplier facto	0) ry (10890)						Deadline 2024-05-19		End of lif	0 \$
		202	□ G □ H									2024-09-04			
Select al	Deselect all Choose	action: Request docum	Cancel	Clear all Apply filte	er Save as favor	ite				h	6	2024-07-11	First Previo	ous 1 Ne	ext Last



 \square

- 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

Specific suppliers filter ACME A 🗶 ACME A (10100) 🗶 DEMO Not intended for production use 1 Create a new Technical File Import Import documents All files + Display 10 💌 records per page Showing 1 to 2 of 2 records Status Progress Supplier Draft ACME A ≡ = Draft ACME A (10100) Select all Dese Set supplier code Execute Choose action:

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

Company	Contacts	
Add compar Display 100	View disabled compar	ies Cleanup duplicate companies Jpdate technical file supplier info
Code	🛓 Name	 General phone number Country/Region
10100	ACME A	
10100	Acme A	
10200	ACME B	Cleanup duplicate companies
10300	ACME C	This function helps you cleanup duplicate companies in your address book based on the company code.
	Supplier Demo syst	Duplicate companies found.
10890	Supplier factory	All companies with code 10100
Showing 1 to	6 of 6 reco	ACME A (straatweg 21 / 2345 as / Town)
		O Acme A (-)
		Select the company to keep. All contacts will be linked to the chosen company.
		Cancel Save



Step 4: Update the information in the technical file

- Click "update technical file supplier info"

Company Con	itacts			
Add company	View disabled companies	Cleanup duplicate compani	Update technical file supp	olier info
Display 100 r	ecords 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.





- 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.



 \frown

	DEMO	Requests 9	Tasks	Invites	Shares	Reports	Dashboard		()	0	Enterprise	63	8 8				
Company	Elle Graune Litere Graune Brand names Bibli konto Projecto Demoine	Tees Custe	nern Terrelates	World	Account	setting	gs					-	♦	은 My Prof	lie ly account	5	
Dat	any ne utuga User user user utuga saran nenes kisi ketes reports uunane tagi Lustanen tempores wun nenen ketinga Data import														account d book tion Center	ocuments	
Wh This Save	Data import Constrained Const																

- 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

Compa	vy Contacts										
Add	v 100 e records per	led companies Cleanup duplicate companies	Update technical file supplier info					Find			
Cod	a Same		Default contact person		E-mail	General pl	hone number Cou	untry/Region			-
1010	0 ACME									2	×
1020	0 ACME E									. 🖉	×
1030	0 ACME 0				Edit				,	د ۷	×
	Supplie	Demo system			Company code	10100				2	×
1089	0 Supplie	factory			Company Name*	ACME A					×
Showi	ng 1 to 5 of 5 records				Postal code:					vious 1 Next Last	đ
				2 E	City:						
					VAT number:						
				Powered by Productil	General phone number:						
					Country/Region:	- Select one-		۲			
					Default contact person	No default contact	t person set	۲			
					Cancel Save		✓ No default co	ontact person set		4	
							John the Sup	oplier (contact@email.co	om)		

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)

r	All files	٠																
l	Displey	10	💌 records p	er page	Showing 1 to 3 of	3 records								File	Product	() Find	Supplier Filter Sele	ct columns
			Progress	Status	Supplier	Workflow status	Market release	Created	Product	Deadline (Services	Regions	Division	Group	category	Supplier contact e-mail		
		=		Draft	ACME A (10100)	Active	2024-06-16	2024-03-14	3015370 (LSC Smart plafondiamp dia.40cm 220- 240V 20W 2000im dimbaar)	2024-05-19	BUY IY	EU+2		DIY		contact@company.com		
l	2	=	II O <u>Å</u>	Draft	ACME A (10100)	Collecting and organising documents	2024-07-24	2024-07-24	1567643 (abc)	2024-09-04	BUY IV	EU+3			Swimming accessories - Swim fins, flippers			
	8	=		Draft	ACME A (10100)	Active	2024-06-16	2028-02-26	3015370 (LSC Smart plafondiemp dia.40cm 220- 240V 20W 2000im dimbaer)	2024-05-19	RJY Y	EU+2		DIY				
	Selec	tall		Choose a	ctio : Update su	ipplier contact 🛞	Execute										First Previous 1	Next Last

- 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.

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

Б П

TRUST

Ш В

