

HOW CAN I INVITE A SUPPLIER - AND WHAT HAPPENS NEXT ?

Via an Invite you connect a supplier to a file, not to your account, so that you can assign a task to them that they can carry out. The prime task is to upload documents. Other tasks will be developed in the future. Your supplier does not have access to information in your file other than the documents that he uploaded himself.

Your supplier has to setup an account if he has not yet done that. There is no charge for that

YOUR SUPPLIER CONTACT DETAILS.

These will be added to your address book automatically. Note that there is no generic ProductIP user address book.

FREE TEXT

Select requirements to filter out what your supplier has to do

PLANNING - DEFAULT 14 DAYS

Add documents relevant for the supplier. These will not appear in the file

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Default we ask your supplier to upload documents that could serve as evidence of compliance with all the requirements in the list.

It is however most likely that some of these requirements have to be fulfilled with evidence that you have to provide / upload yourself.

Some consider the list to be too overwhelming for their suppliers and therefore opt to share the information step by step.

You make this adjustment via this [SELECT REQUIREMENTS] button in the invite.

You can select for example all the requirements in risk category A and B1.

You can even adjust the requirements individually.

Requirements that are already fulfilled or have been set to Not Applicable by you are already filtered out.

Select requirements

Select Requirement Categories

- ☐ Declaration of Conformity (DOC)
- ☐ Type testing - local and final (A)
- ☐ Production - Retail and final (B1)
- ☐ Production - Sales-stop and final (B2)
- ☐ Production - Warning and final (B3)
- ☐ Transport (T)
- ☐ Performance and specification (L)
- ☐ Corporate responsibilities (D)
- ☐ Business critical requirements (E)
- ☐ Company specific requirements (F)
- ☐ Guides and Test methods (G)

Select specific requirements

For requirements that are fulfilled or not applicable no documents are requested from the invitee. If you wish to include them in the invite you need to set the requirements to unfulfilled first.

Find:

Requirements	Category	Expiry Date	Regions
☐ Product Information (0/3)			
☐ 1 Product construction - Bill of Materials, Substances (BOM, BCS) of the product (0)	B3		EU
☐ 1 Product Identification - Declaration of Product Identity (0)	B3		EU
☐ 1 Product Identification - Pictures, artwork (0)	B3		EU
☐ Product Labelling (0/3)			
☐ 1 French Decree 2014-1517 about the Triman recycle sign (0)	B3		FR
☐ 1 Traceability - Production batch code (0)	B3		EU
☐ 1 User Information - Markings, Ratings, Warnings, Pictograms (0)	B1		EU
☐ Packaging information (0/3)			
☐ 1 Product construction - Bill of Materials (BOM) of the packaging (0)	B3		EU
☐ 1 Product Identification - Declaration of Product Identity of packaging (0)	B3		EU
☐ 1 Product Identification - Pictures, artwork of Packaging (0)	B3		EU
☐ General Product Safety Directive (GPSD) 2005/18/EC (0/3)			

Select all Deselect all Save Cancel

[View details](#) [Hide details](#)

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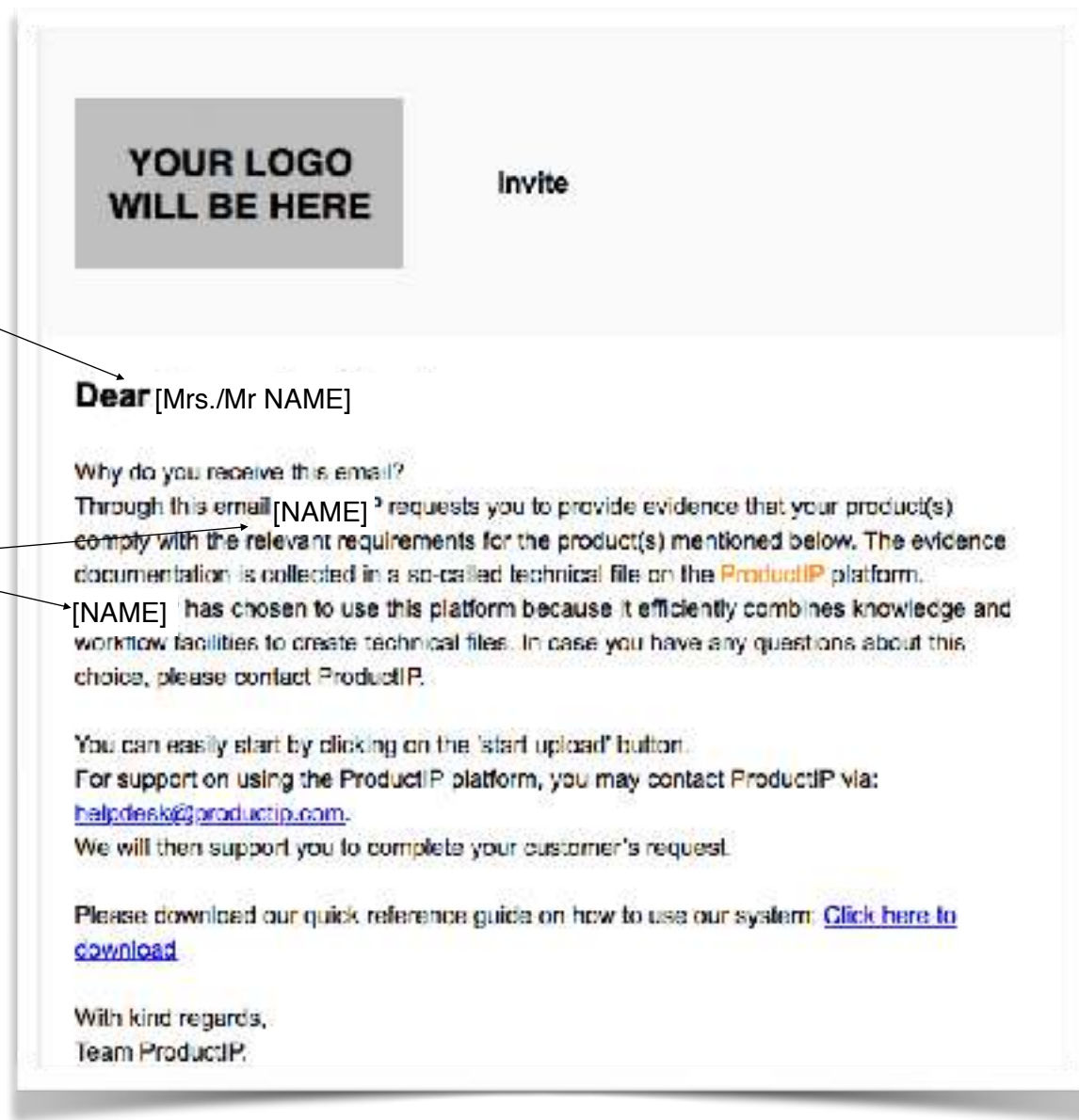
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CONTACT PERSON OF YOUR SUPPLIER

NAME OF YOUR COMPANY



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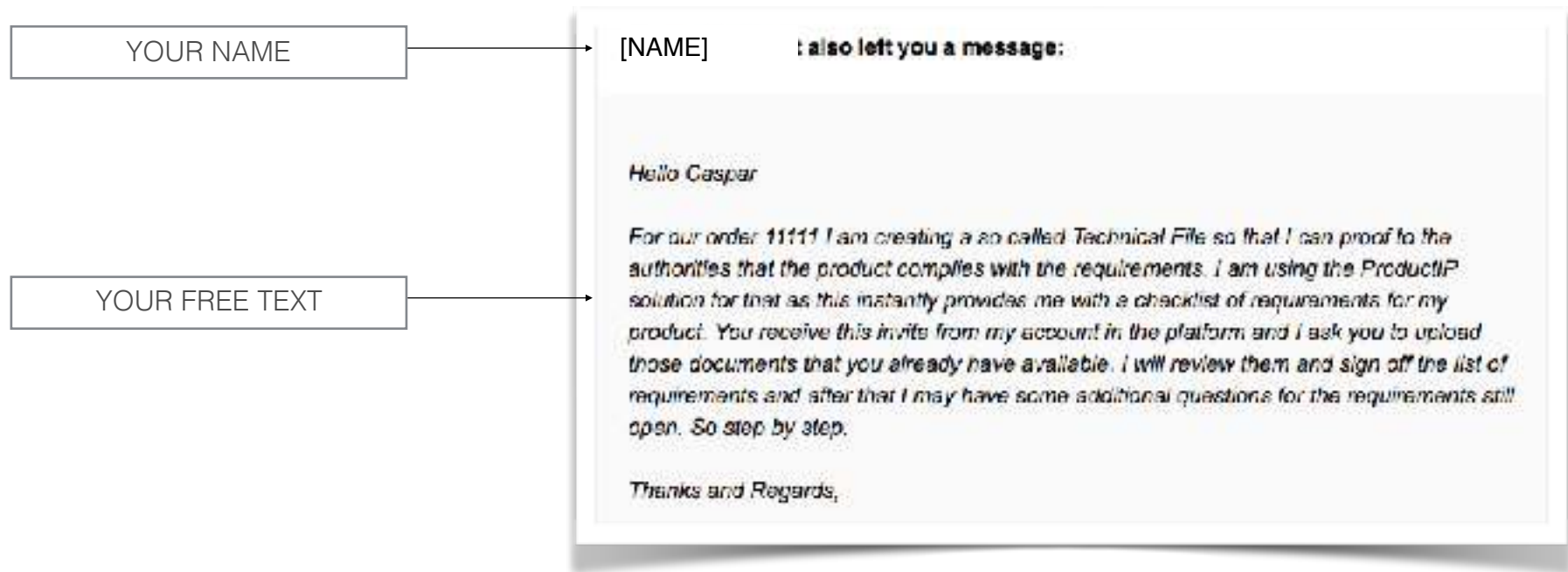
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We don't show your requirement-list to your supplier. We have defined the kind of documents that could be used to sign off on these requirements and we ask only for these. What kind of documents are requested is based on the selected requirements at the moment of the invite.

REQUESTED DOCUMENTS
BASED ON THE
REQUIREMENTS IN YOUR
LIST.

YOUR SUPPLIER NEEDS TO
CREATE AN ACCOUNT IF HE
DOESN'T HAVE AN ACCOUNT
YET. THERE IS NO FEE FOR
CREATING THIS ACCOUNT.

Product name	Requested documents
- Black Box(0000001)	Product Information - Declaration of Product Identity - Product Information Product Labelling - Product Labelling - Artwork Packaging Information - Packaging Information General Product Safety Directive (GPSD) 2001/95/EC - (General Product Safety Directive (GPSD) - Risk assessment report REACH Regulation (EC) 1907/2006 - REACH - Test report Hazardous Substances not covered by REACH - Chemical Substances - Declaration - REACH - Test report Persistent Organic Pollutants (POP) Regulation (EC) 850/2004 - Persistent Organic Pollutants (POP) Regulation - Test report Packaging and Packaging Waste Directive 94/62/EC - Packaging Directive - Test report - Packaging Waste Directive - Declaration - REACH - Test report Quality Control - Quality Management System - Audit report - Quality Management System - Certificate Social Compliance (CSR) - Social Compliance (CSR) - Audit report - Social Compliance (CSR) - Certificate

START UPLOADING

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NAME OF YOUR COMPANY

YOUR NAME

This is what your supplier sees after he has logged into his account. If he doesn't have technical files he will go straight into this screen where he can accept the invite and the task to upload. If he does have files he will see that he has a new request that requires his attention.

YOUR SUPPLIER CLICKS HERE TO CONFIRM AND START

View request

[YOUR NAME] of [YOUR COMPANY NAME]
is requesting your collaboration for the following product:

Our product	Your product
Stark Parc (0057001)	N/A (N/A)

Message from [YOUR NAME]
Hello Caspar:

For our order 11111 I am creating a so called 'technical file' so that I can prove to the authorities that the product complies with the requirements. I am using the ProductIP solution for that as this instantly provides me with a checklist of requirements for my product. You receive this invite from my account in the platform and I ask you to upload those documents that you already have available. I will review them and sign off the list of requirements and when that I may have some additional questions for the requirements still open. So step by step.

Thanks and Regards,
Caspar

You are requested to carry out the following tasks:

Description	Deadline
Upload technical documents	2016-03-10

Please confirm you can carry out the tasks for this product:

YOUR LOGO WILL BE HERE

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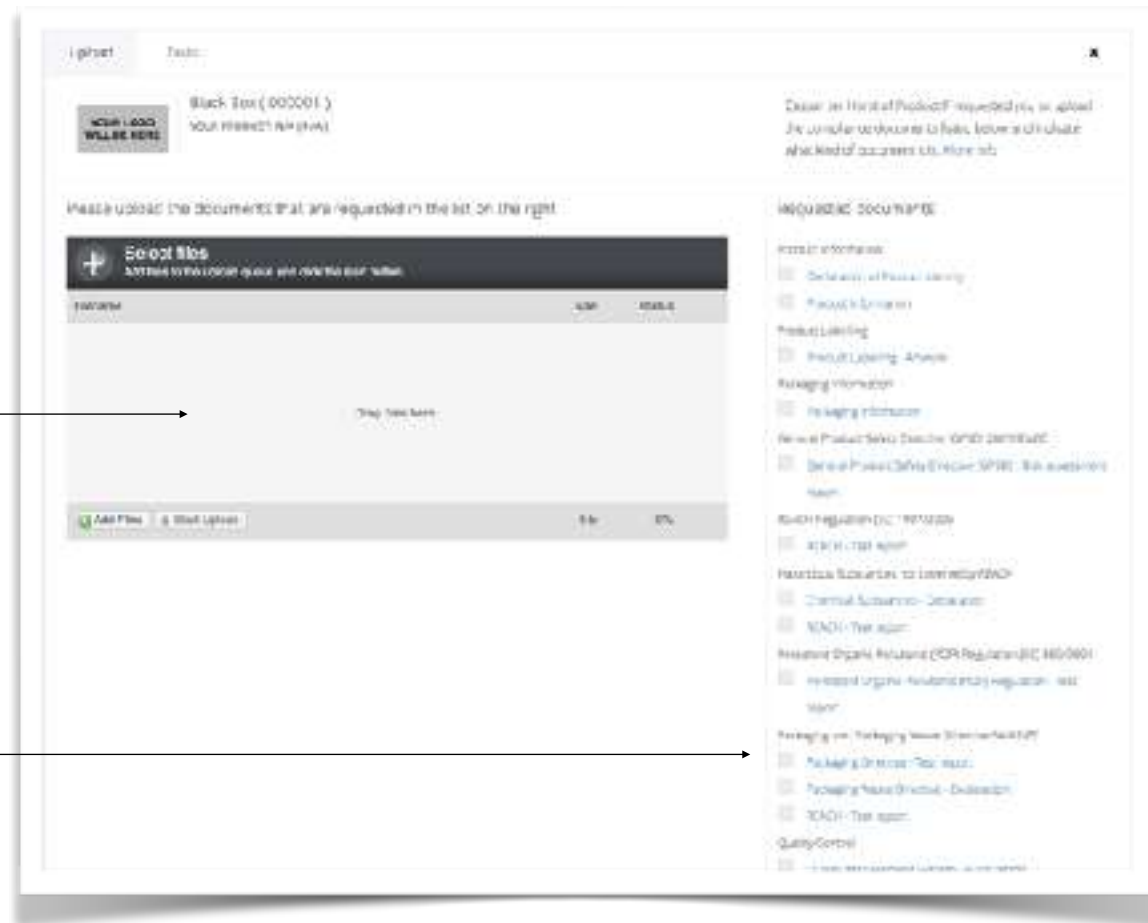
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DRAG & DROP THE DOCUMENTS THAT NEEDED TO BE UPLOADED HERE. ALTERNATE UPLOAD METHODS WILL BE AUTOMATICALLY PROVIDED FOR THOSE THAT CANNOT ACCEPT DRAG & DROP.

PREFERBALIY INDICATE WHICH DOCUMENT IS WHAT TYPE



THIS IS SHOWN AFTER CLICKING ON “WHY?”

Why?

Dear supplier,

The EU has clearly defined the responsibilities regarding product compliance for the different entities in the supply chain. As a consequence Importers, brand-owners / manufacturers, distributors and legal representatives need to structure the process around product compliance.

In order to demonstrate that our products comply with European, national and company specific requirements we are going to create a technical file for each product. Such a file contains all necessary documentation to prove compliance with relevant requirements and can be shared with our clients, market surveillance and customs authorities as well as other stakeholders.

Because of this, we decided to partner up with ProductIP. This company offers a secure Internet based compliance management platform that provides us with a comprehensive product specific requirements list and enables us to create, manage and share technical files in structured way. Additionally, Product IP provides expert advice on compliance related matters and helps us to streamline the product compliance process within our organisation.

To accelerate the process of creating technical files, ProductIP has a local team in China that will help us. Because we need documentation from you as well, they will contact you soon with a request to upload information into our technical files. The costs for ProductIP's

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MORE DETAILED INFORMATION IS SHOWN ON MOUSE OVER

Related requirements

Product construction - Bill of Materials, Substances (BOM, BOS) of the product
 The Bill of Materials gives an overview of the parts required to produce the product. The minimums that should be highlighted here are those parts relevant for compliance with the requirements. There could be parts relevant for EMC, EMI, but also plastic relevant for mechanical strength and so on. It shall be not easy to dismiss parts from the list as being not relevant. The Bill of Substances is relevant for the chemical assessment of the product e.g. for REACH or Carcinogens, etc.

Product identification - Pictures, artwork
 Please include here products of the pictures. These could be generic pictures that you use to identify the product.

Requested documents

Product Information
 Declaration of Product Identity
 Product Information
 Label Labelling
 Product Labelling - Artwork
 Labeling Information
 Packaging Information
 General Product Safety Directive (GPSD) 2001/65/EC
 General Product Safety Directive (GPSD) - Risk assessment report

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THIS IS SHOWN AFTER CLICKING ON "TASKS"

YOUR SUPPLIER CAN SIGN OFF THE TASK HERE

YOUR SUPPLIER CAN ADD A COMMENT HERE

Upload Tasks

YOUR LOGO WILL BE HERE

Black Box (000001)

YOUR PRODUCT: MIA (NUM)

Upload technical documents

February 2014, Thursday

Created by Caspar ter Horst (caspar@productip.com) on 2014-02-25 14:18:54

Assigned to: Caspar ter Horst (terhorst@me.com)

Deadline: 2014-03-10

Upload the documents that provide proof of compliance for your product

Comments

I have completed it. Please share your comments after review and if anything missing assign a new task to me

Add comment

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PROGRESS CONFIRMATION AND COMMENTS STRAIGHT INTO YOUR E-MAIL INBOX

Caspar ter Horst has accepted the invite for your Technical File on ProductIP
Product: Black Box (000001)

You got a note from Caspar ter Horst.
Product: Black Box (000001)
note:

I have completed it. Please share your comments after review and if anything missing assign a new task to me!

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AFTER UPLOAD YOUR SUPPLIER INDICATES WHAT KIND OF DOCUMENT IT IS
THIS HELPS YOU LATER WITH REVIEWING THIS DOCUMENT ! INFORMATION STAYS IN CONTEXT !

The screenshot displays the ProductIP upload interface. At the top, a table lists documents:

Document	Category	File	Metadata
black box packaging artwork.jpg	Product Labeling - Artwork	File	Metadata

Below this, the 'Upload' tab is active, showing a task for 'Black Box (000001)'. The interface includes a 'Select files' button, a file upload area with a 'Drag files here' prompt, and an 'Add Files' button. A progress bar shows 0% completion. On the right, a list of 'Requested documents' is shown, with 'Product Labeling - Artwork' highlighted. The list includes categories like Product information, Product labeling, Packaging information, General Product Safety Directive (GPSD), REACH Regulation, Hazardous Substances, and Persistent Organic Pollutants (POP).

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YOUR SUPPLIER CAN ADD EVEN MORE METADATA

Enter details for document black box packaging artwork.jpg

Name: black box packaging artwork

Description:

Reference Number:

Issued By:

Issue Date: *

Issued To:

Expiry Date: *

RSCI D&ID Number:

RFT Result: select_result

RSD Factory Country: Select country

Remind Date: *

Remind note:

Cancel Save

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YOUR SUPPLIER CAN PAUSE IN BETWEEN OR SAVE & CLOSE THIS TASK

Save & Continue later

Save & Close as finished



AFTER CONFIRMING OF COURSE

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AND AGAIN A CONFIRMATION COMES STRAIGHT INTO YOUR E-MAIL INBOX

The activity was finished by supplier, you can start to review it.
Product: Black Box (000001)

AND YOU CAN FIND IT IN YOUR ACCOUNT UNDER TASKS - TASKS THAT ARE READY (SORT!)

YOUR LOGO WILL BE HERE

DEMO
This environment is not intended for production use

Logged in as: Credits: Subscription: [Yes] Logout

Technical files Requirements files Supplier files Resources **Tasks** Invoices Events

Tasks

This page shows an overview of all tasks sorted per Technical File.

Display: 100 records per page

Name	tasks	Status	Created	Deadline	Assigned to	Follow-up by
Black Box (000001)	Upload technical documents	ready	2015-02-25	2015-02-15	Casper ter Horst	Casper ter Horst

Find:

Find a task Find a supplier

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OR LOOK FOR THE FILE ON THE TAB WITH FILES WITH DOCUMENTS THAT NEED TO BE REVIEWED

YOUR LOGO WILL BE HERE

DEMO
This environment is not intended for production use

Your technical files

Create a new Technical File

All files Documents that need to be reviewed. +

Filters: Pre-draft, Draft, EOL non expired, Document status - (Unchecked, Pending)

Display 10 records per page Showing 1 to 10 of 632 records (Total 1,062 records)

	Status	Created	Deadline	Supplier name	Product
☐		2016-02-25	2016-04-07		000001 (Black Box)

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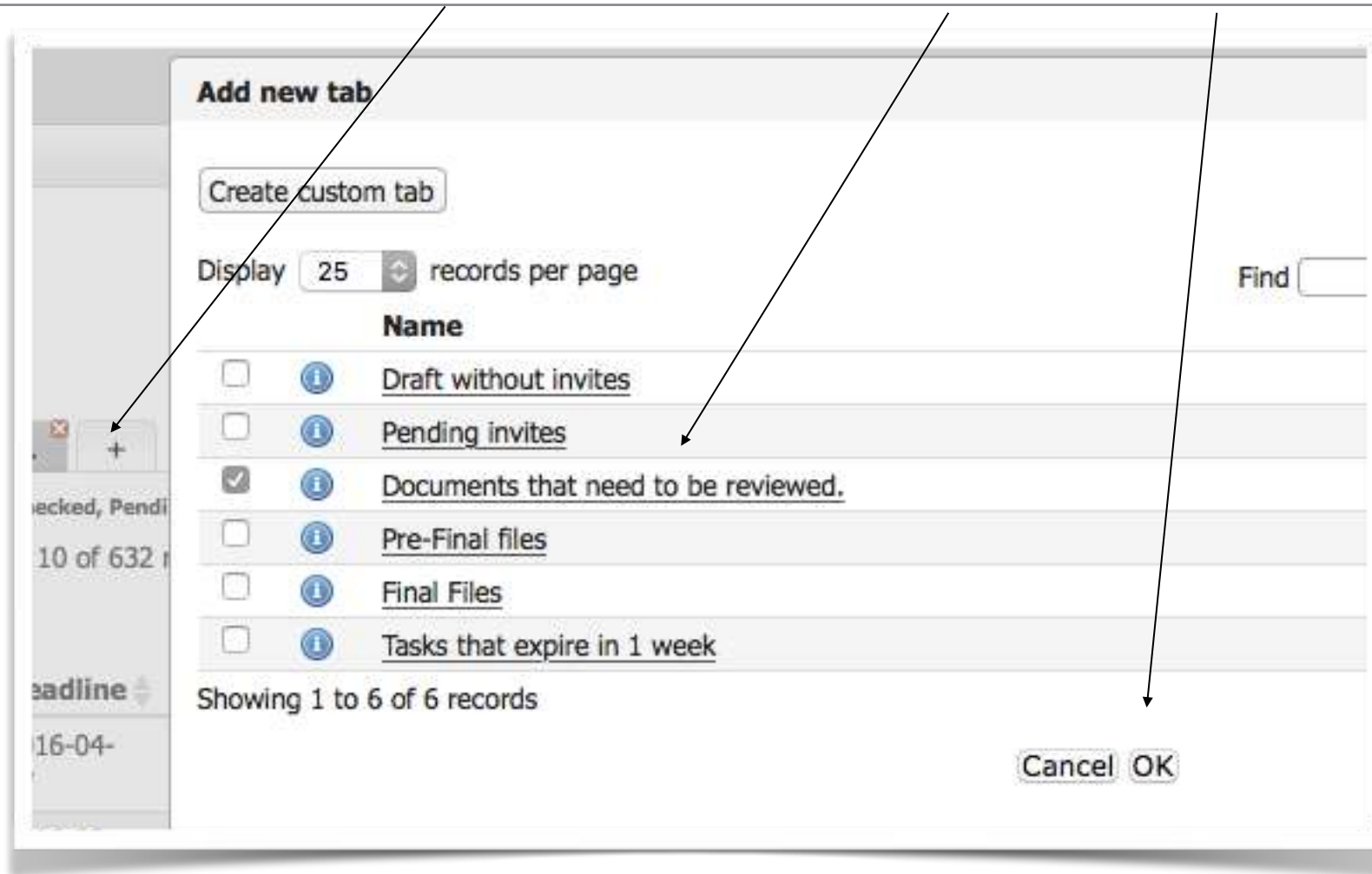
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CLICK ON THE [+] - SELECT THE PRE-SET TAB FILTER IN THE POP-UP AND PRESS OK TO INSTALL THIS TAB



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NEXT STEP IS TO REVIEW DOCUMENTS AND EITHER SIGN OFF THE TASK OR GIVE YOUR USER NEW INSTRUCTIONS

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