PIP – Supplier Onboarding Process

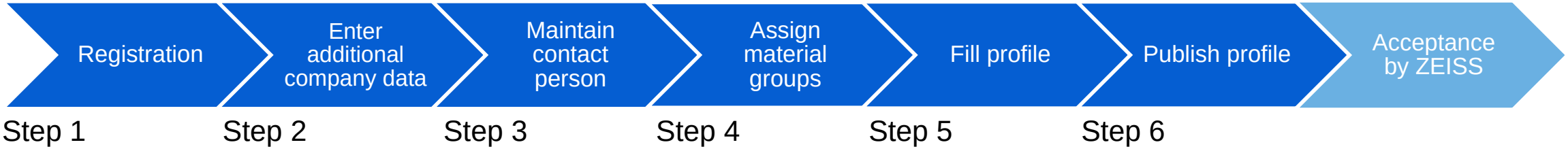
Step-By-Step Supplier Manual

Oberkochen, 18.10.2018

PIP – Procurement Interaction Portal
General Information

Content of this document:
This is a step-by-step manual of the onboarding process for supplier, with the leading ZEISS SRM platform PIP (Procurement Interaction Portal).

Overview of the process steps for the onboarding of ZEISS Suppliers:
Six steps are necessary for a successful onboarding process.



Remark:
Your profile can be evaluated in a more efficient way, if you maintain your data correctly and in detail. It also has a positive impact on the chances, that your business relation to ZEISS gets more established or intensive.

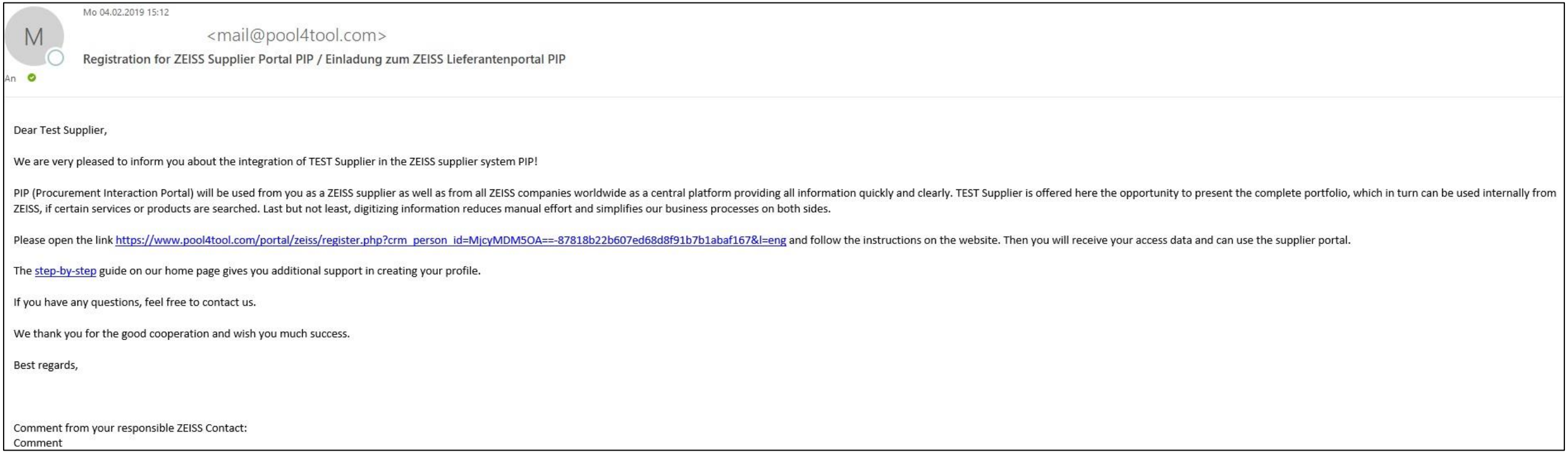
PIP – Procurement Interaction Portal
Benefits for ZEISS Supplier

Which benefits does PIP provide for ZEISS Supplier?

- Through publishing your supplier profile you have the chance to represent your entire performance portfolio to the whole ZEISS Group.
- Your supplier profile is visible for the whole ZEISS Group.
- You only have to maintain your data one time.
- Through the registration in PIP you have new possibilities for communication and cooperation with ZEISS. Processes and the flow of information will be optimized.
- The information of the supplier profile are used to evaluate new suppliers for ZEISS and to approve them for further purchasing actions.

PIP – Procurement Interaction Portal
Step 1 – Registration

- You will receive an invitation via e-mail from mail@pool4tool.com. Klick on the link and you will automatically be forwarded to the registration.
- If you click “Answer” then you will automatically respond to your responsible ZEISS contact.



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Registration for ZEISS Supplier Portal PIP / Einladung zum ZEISS Lieferantenportal PIP

An

Dear Test Supplier,

We are very pleased to inform you about the integration of TEST Supplier in the ZEISS supplier system PIP!

PIP (Procurement Interaction Portal) will be used from you as a ZEISS supplier as well as from all ZEISS companies worldwide as a central platform providing all information quickly and clearly. TEST Supplier is offered here the opportunity to present the complete portfolio, which in turn can be used internally from ZEISS, if certain services or products are searched. Last but not least, digitizing information reduces manual effort and simplifies our business processes on both sides.

Please open the link https://www.pool4tool.com/portal/zeiss/register.php?crm_person_id=MjcyMDM5OA==-87818b22b607ed68d8f91b7b1abaf167&l=eng and follow the instructions on the website. Then you will receive your access data and can use the supplier portal.

The step-by-step guide on our home page gives you additional support in creating your profile.

If you have any questions, feel free to contact us.

We thank you for the good cooperation and wish you much success.

Best regards,

Comment from your responsible ZEISS Contact:
Comment

If you already have access to the ZEISS Supplier Portal you will receive a direct link to your company profile and you can skip the registration (Step1).

PIP – Procurement Interaction Portal
Step 1 – Registration

Registration:

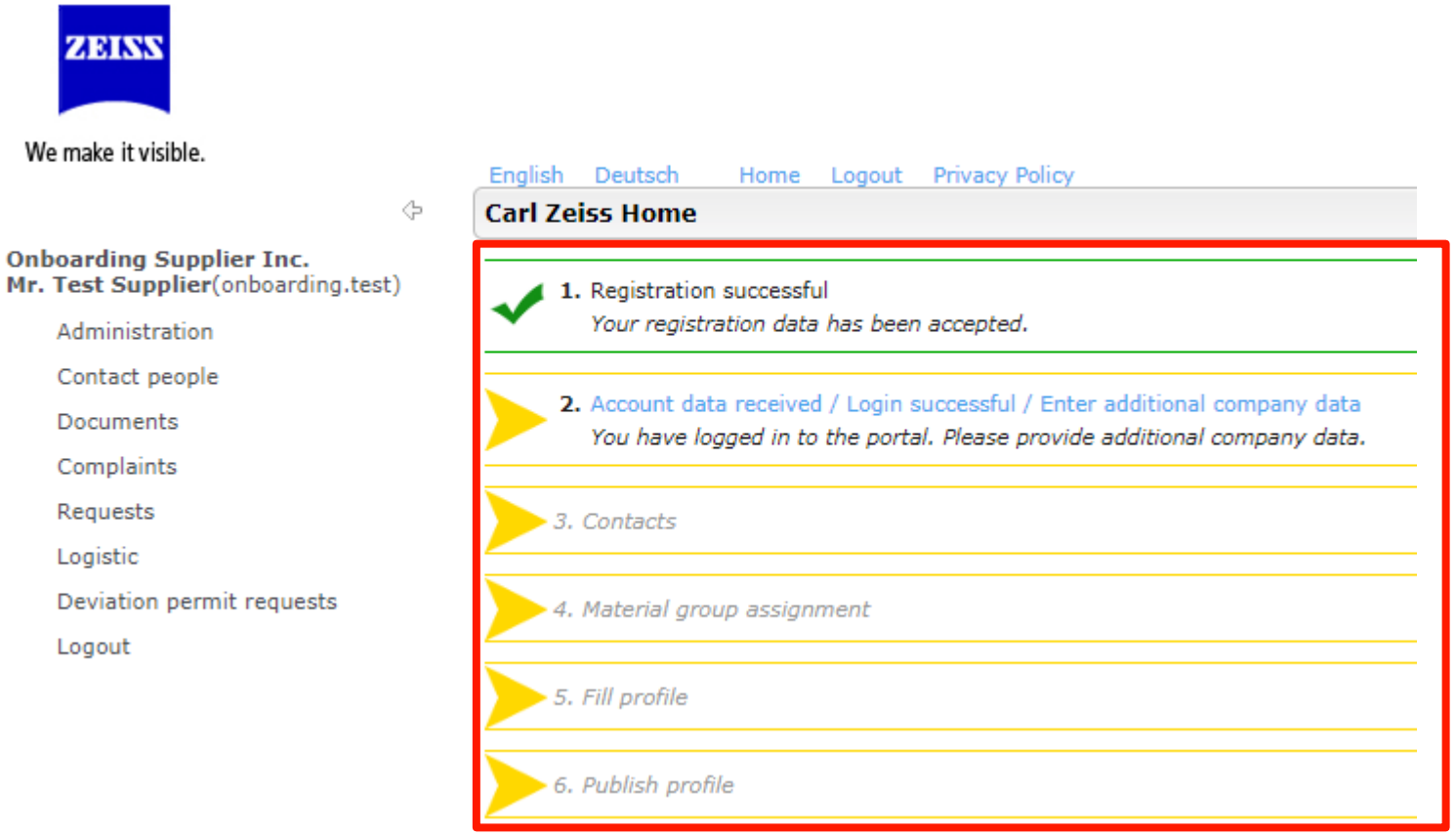
- Please fill in as much information as possible for “general company data” in the registration form. Therefore you have to fill in all mandatory fields, which are marked with “*”.
- Fill in the “*Contact person data“* and klick on the button Check data.
- In the background the system is checking your information regarding correctness and duplicates. If all information are valid than klick on Send to finish the registration.

Password:

- After the successful registration you receive an e-mail with your login information and a link to the PIP portal.
- Klick on the link an login into the PIP portal.
- After your first login you will be asked to change your password regarding the standard password requirements.

PIP – Procurement Interaction Portal
Step 1 – Registration

After the first login you will see the registration-wizzard:

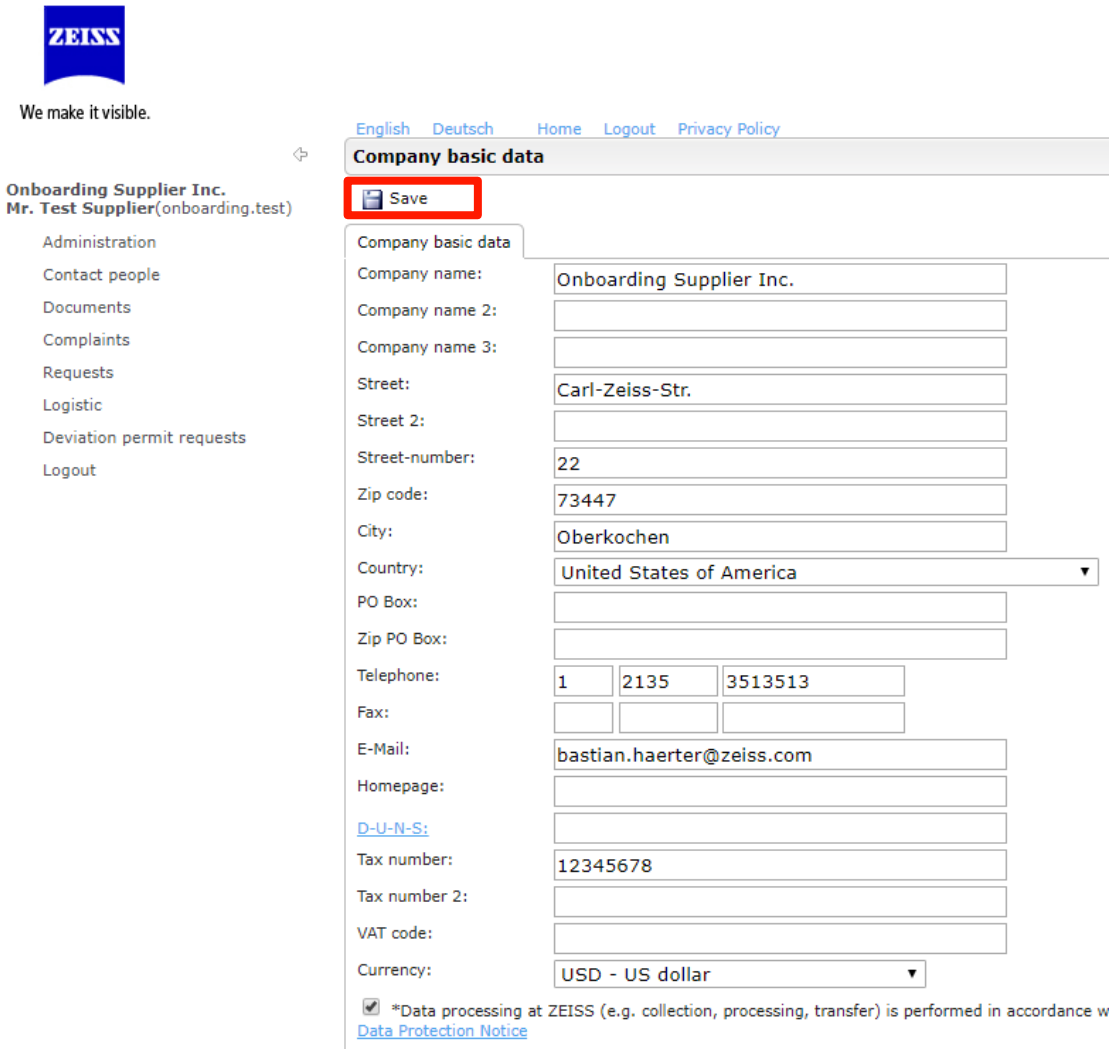


Please follow the registration steps.

PIP – Procurement Interaction Portal
Step 2 – Enter additional company data

2. Account data received / Login successful / Enter additional company data

- Here you have the chance to check and complete your general campany.
- To continue the process klick on Save . After a few seconds you will be forwarded to the registration wizard again.



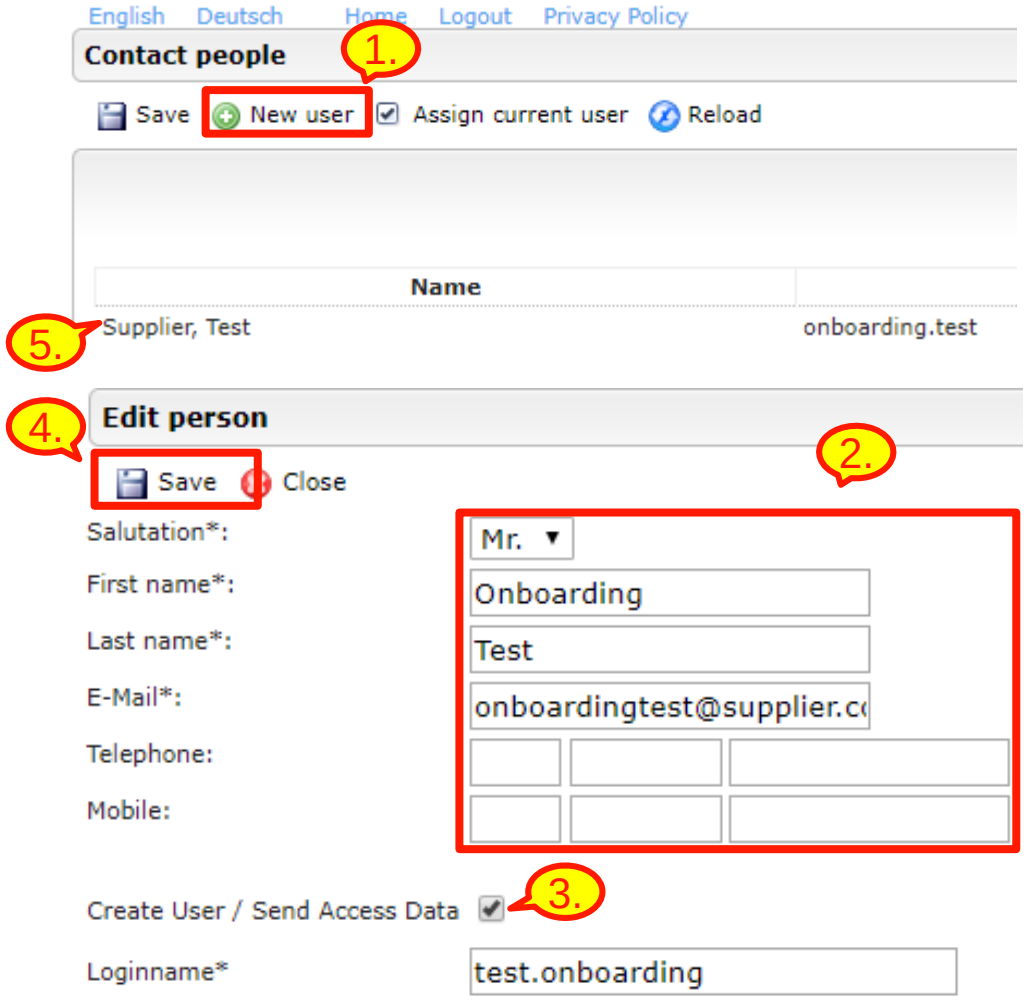
PIP – Procurement Interaction Portal
Step 3 – Contacts

3. Contacts – Create new user

- You have the possibility to create new user accounts for your company. After the creation of an user you have the chance to assign specific roles to the new user.

- Creation of a new user:

1. Click on “new user“.
2. Fill in the contact information for the new user.
3. Through activating the check box “create user” the new user gets an own account and you have to fill in a “loginname”.
4. Confirm the information through clicking on Save .
5. You can see the new user in the user list.



PIP – Procurement Interaction Portal
Step 3 – Contacts

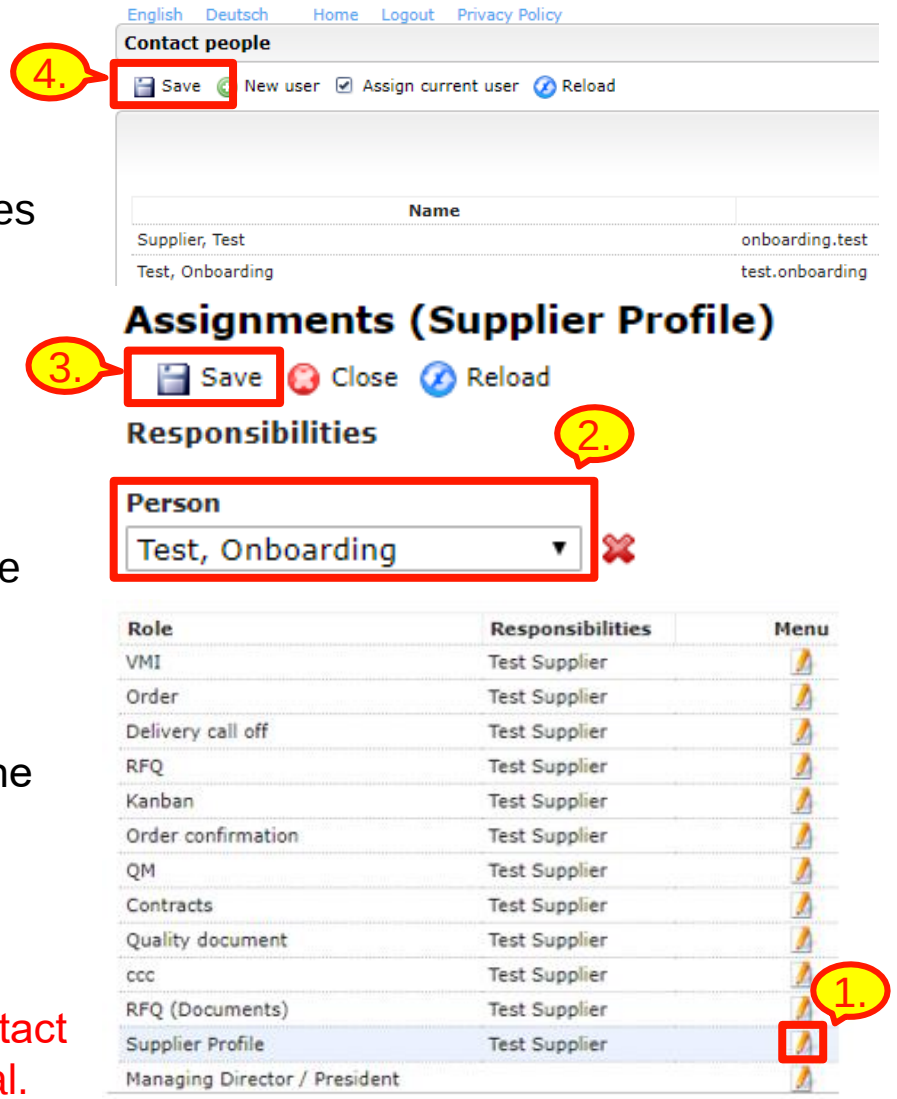
3. Contacts – Assignment of roles

- After the creation you can assign one or more responsibilities of a role to the user:

1. If you want to change the responsibility of a role click on (edit).
2. In the dropdown menu “person” you can choose the responsible user.
   Never choose a purchasing group, if you are able to choose one.
3. Click on Save to save the assignment.
4. After the assignment of all roles, click on the save button (below the heading “Contact people”), to be forwarded to the registration wizard.

Attention:

If you change an existing contact, e.g. for “Order" this new contact will be notified in the future and receive the orders via the portal.



3. Contacts – Additional information to specify contact persons

- The roles control only who gets the notifications for the respective processes in the portal.
- Every user of your company can see and process all processes in the system, regardless of whether this person is the defined contact for a natification.
- You can use the information button “ ” to display which notifications concern the respective role:

Role	Responsibilities	Menu
VMI	Test Supplier	
Order	Test Supplier	
Delivery call off	Test Supplier	

- Please never select a purchasing group or company code. This is maintained by ZEISS.
- There must be a responsible person for almost all roles, even if the respective process is currently not used. This has the function that the notifications are not lost when activating a new process.

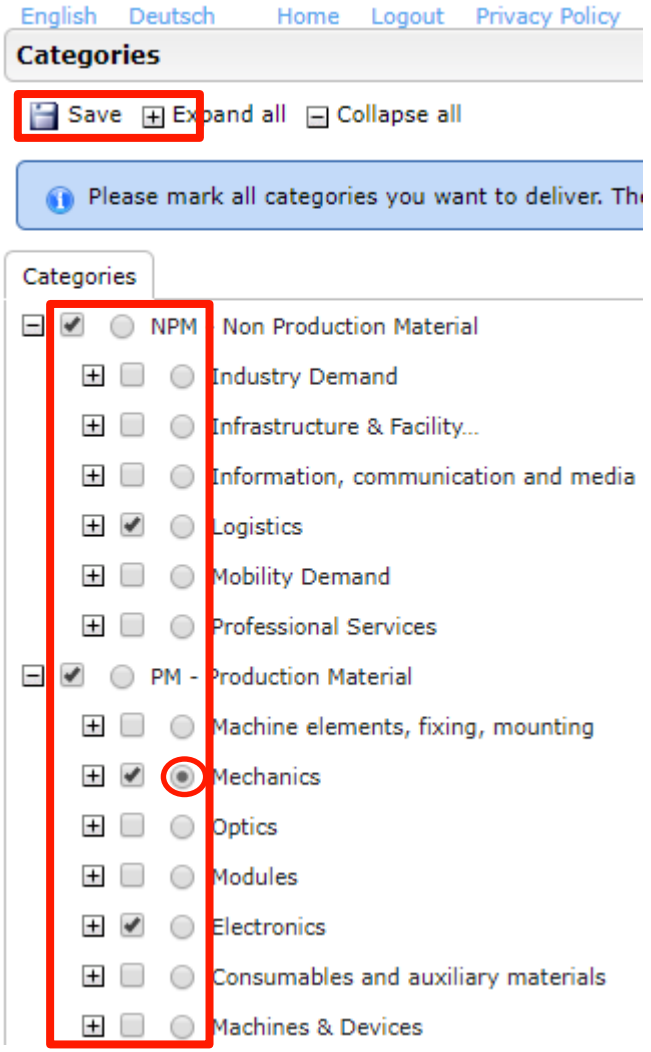
PIP – Procurement Interaction Portal
Step 4 – Material group assignment

4. Material group assignment

- Please choose all categories you are able to deliver to ZEISS.
- Choose one main-category (round Checkbox).
- Click on the save button to confirm your material group assignment and to return to the registration wizard.

Please take your time for the correct assignment of the material groups. Through this assignment PIP controls, which information you are able to fill in your supplier profile.

The selection of the main-category is just for internal purposes and don't influence your business relation with ZEISS.



PIP – Procurement Interaction Portal
Step 5 – Fill profile

5. Fill profile

- Please maintain as much information as possible in your company profile.

- The profile consists of three questionnaires:
  - General
  - Technical
  - Certificates

- Through clicking on Save & Next you automatically will be forwarded to the next questionnaire.

You can caching your profile at any time through clicking on Save .

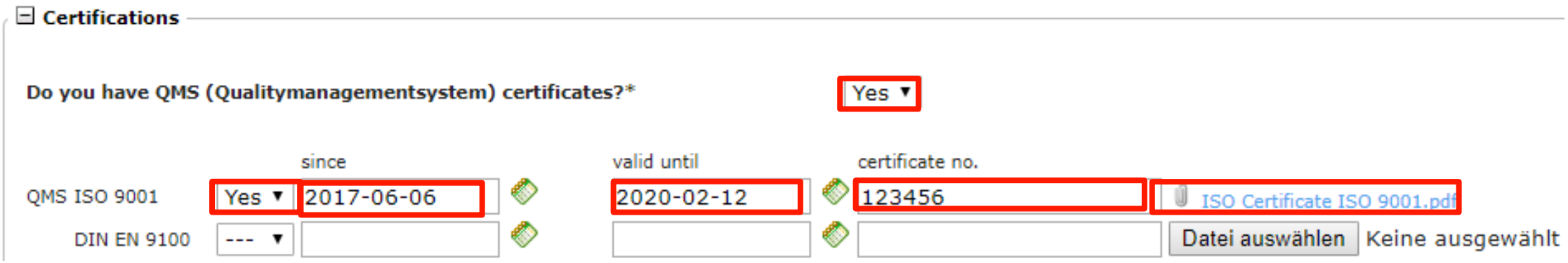
The fields which are marked with a “*” are mandatory fields. In the yellow information box you can see how many mandatory fields are filled in. The mandatory fields only represent the absolute minimum of information that ZEISS requires from suppliers. Most divisions have internally defined additional mandatory fields which are necessary that a profile will be accepted.

Empty mandatory fields will be marked with **red**, when you try to save the profile.

PIP – Procurement Interaction Portal
Step 5 – Fill profile

5. Fill profile - Certificates

- Please give us all information about available certificates and upload the documents.



For some organization units of ZEISS certificates are elementary requirements for a business relation.

Every certificate will be checked by ZEISS before accepting your profile.

PIP – Procurement Interaction Portal
Step 6 – Publish profile

6. Publish profile

- After maintaining your profile you are able to save your information.
- To finish the onboarding process and send your profile to ZEISS, it is necessary to publish your profile to ZEISS.
- To publish your profile click on

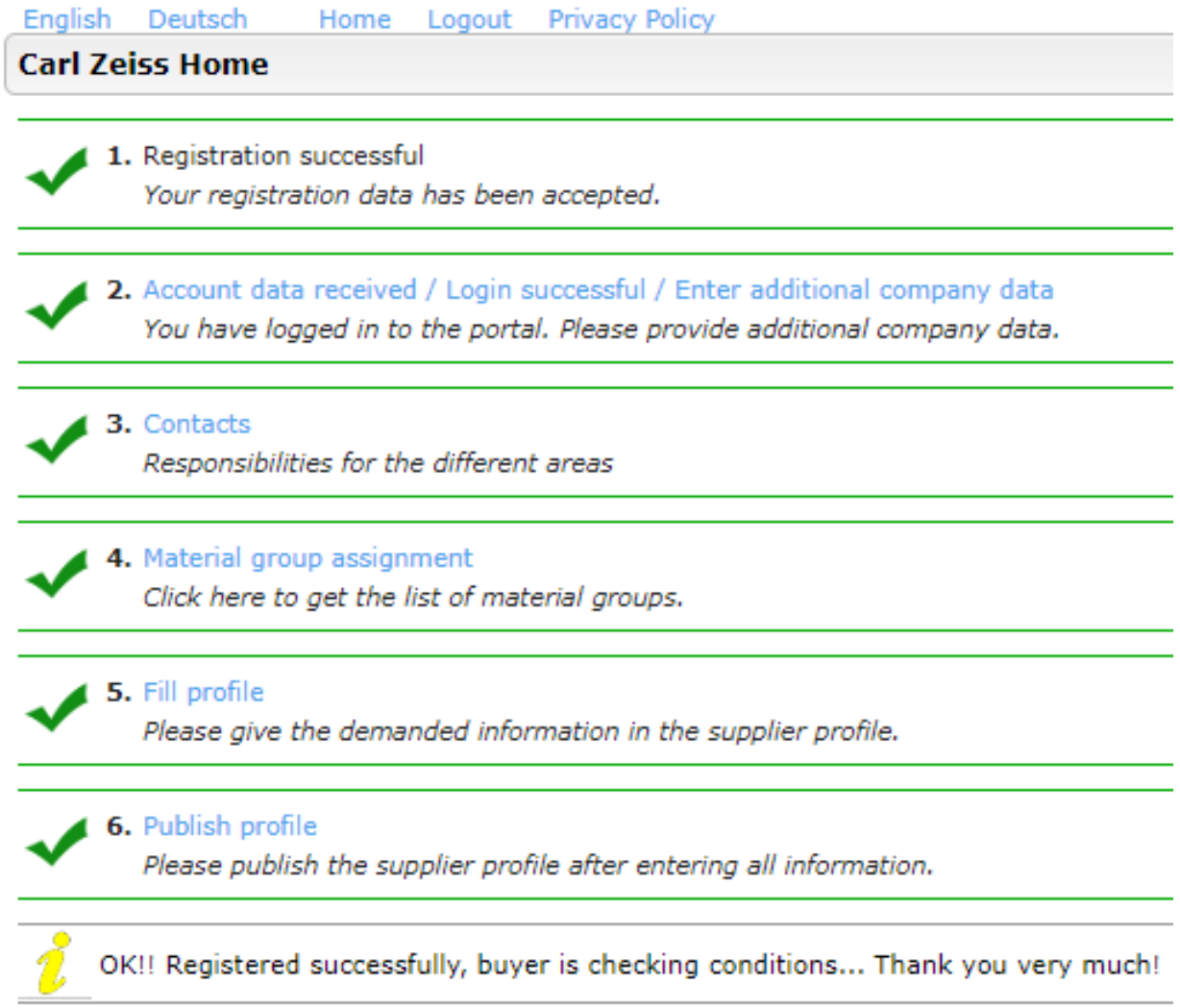
- Afterwards the relevant buyer of ZEISS receive an e-mail. If your information are complete an correct, the buyer will accept your profile.

As long as ZEISS is checking your profile, you are not able to change any information in the profile.

PIP – Procurement Interaction Portal
Acceptance by ZEISS

Existing Suppliers:

- Afterwards your profile will be checked by your responsible ZEISS-buyer.
- This is the last step of the registration process for existing suppliers.
- You will receive an e-mail as soon as the responsible buyer accepted your profile.

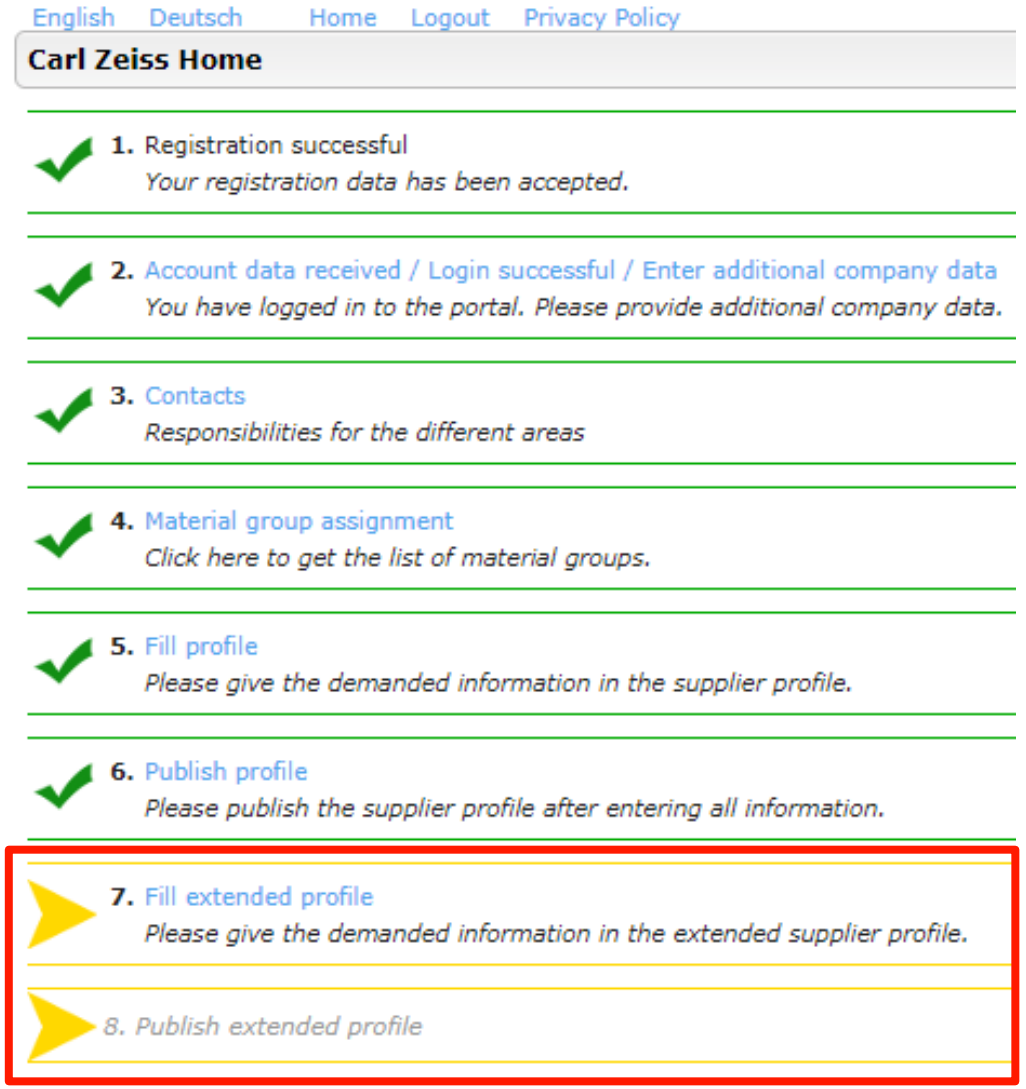


PIP – Procurement Interaction Portal
Acceptance by ZEISS

Potential Suppliers:

- After the first profile acceptance, potential suppliers have to fill the extended profile and publish it again.
- The responsible ZEISS-buyer will check the extended profile again and has the possibility to finally accept it..
- You will receive an e-mail as soon as the buyer decided about the acceptance of the extended profile..

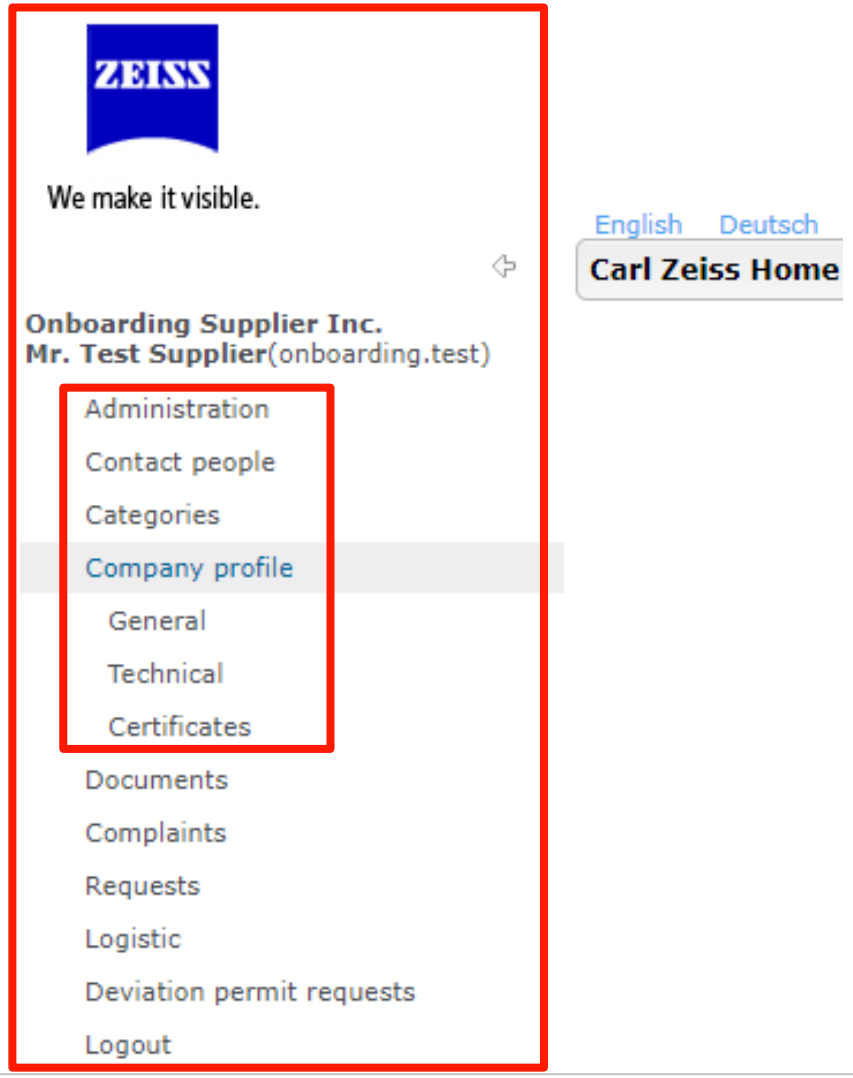
In some cases you don’t have to fill in further information and you can publish your profile again.



PIP – Procurement Interaction Portal
Profile Updates

- After the profile acceptance, it is possible to update your profile information at any time. Therefor you have to login into PIP and navigate to topic you want to update.

Don‘t forget to publish your profile after a update.



ZEISS