PRODUCT MANAGER

Getting Started Guide
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GETTING SUPPORT

Technical support is free to all subscribers for problems and questions you may have for the following type of issues:

- Bugs
- Browser-related issues
- Security
- Advice on migration of your data
- Upgrading, billing and payment

**Free online training is included your subscription.** Please check your plan for the number of included 60-minute training sessions. We recommend that you schedule your training as early as possible after subscribing so that we can assist you in getting started and optimizing cosmetri Product Manager to your requirements.

If you require additional training and support in using cosmetri Product Manager, please click below to purchase support hours prior to scheduling your appointment.

[https://www.cosmetri.com/training-and-custom-support/](https://www.cosmetri.com/training-and-custom-support/)

You can use the following link to schedule a call at a time convenient to you. If you choose a web conferencing option (FreeConferenceCall or Skype), we can share screens and walk you through the software in a live demonstration, customized to your requirements. Use the link below to schedule a call:

[https://www.cosmetri.com/call/](https://www.cosmetri.com/call/)

Alternatively, drop us an email any time at support@cosmetri.com and let us know how we can support you.

SERVICE STATUS UPDATES

To view any current service status updates, including notifications for new releases and scheduled server maintenance, please subscribe to our Twitter feed [@cosmetri](https://twitter.com/cosmetri)

[https://twitter.com/cosmetri](https://twitter.com/cosmetri)
MINIMUM SYSTEM REQUIREMENTS

There's no need to download or install any software on your computer to use cosmetri Product Manager. You'll just navigate to the cosmetri login page in your preferred web browser and log in to your account.

Supported browsers are:

**Chrome**
Download: [https://www.google.com/chrome/](https://www.google.com/chrome/)

**Microsoft Edge**

**Mozilla Firefox**

**Safari** (Mac only)

cosmetri Product Manager is designed for operation using most PCs and tablet devices running on a Mac, Windows or Linux operating system. cosmetri Product Manager is not optimized for use on smartphones.

cosmetri Product Manager does not have a minimum internet requirement, for an optimal performance we do recommend the use of ADSL or broadband and 3G internet speeds or greater for mobile connection. Keep in mind, the performance of cosmetri Product Manager may vary depending on the amount of information you've asked your browser to download. For example, generating a detailed report such as a PIF would take longer to load than viewing a page or tab in the software.

Since you’ll be working in a web browser, there are a few browser-related settings you’ll need to know about.

**Enable cookies**
Make sure cookies are enabled in your browser so all parts of our application work as expected.

**Enable pop-ups and JavaScript**
Pop-ups and JavaScript should be enabled in your browser, so you can view errors, alerts, and preview screens.

**Set your screen resolution**
The minimum screen resolution should ideally be set to 1024px x 768px. If you’re using a netbook or tablet, try setting the resolution to 1200px x 800px if things appear out of place.

**Check your web browser add-ons**
In some cases, browser add-ons, extensions, ad blockers, or plugins can interfere with the functionality of our application. You may want to disable these extras or try a browser without them.

For details of current system requirements see the following:
https://www.cosmetri.com/system-requirements/

**NETWORK CONFIGURATION**

Some networks are configured to automatically switch the IP address being broadcasted. Connecting to a cosmetri application requires maintaining the same IP address during a user session. If the IP address is automatically switched, the user will be logged out of cosmetri. This issue is easily fixed – please contact cosmetri Support (support@cosmetri.com) and we will send you instructions on how to configure your network accordingly. If this is technically not possible, we can remove that restriction for your cosmetri account.
INTRODUCTION

Welcome to cosmetri Product Manager! We want you to get the best possible start in using the software. This guide covers the basic principles of the software, enabling you to add your first product and formula, activate the Compliance Checker and generate a complete product information file (PIF) or dossier.

Once you’ve got the hang of these basic functions you’ll be able to perform advanced tasks that will greatly simplify your business workflow - such as setting up packaging sets, raw material batch and inventory control, projects, quality assurance, manufacturing orders and calculation of formula costs. But let’s focus on the basics first!

IMPORT DEMO DATA

Upon activation of your cosmetri Product Manager account, including the free trial version, you can opt to include demo data. All demo data and documents are intended for training purposes only.

This demo data includes:

- product, formula and its raw materials
- ingredient-level data, including safety calculations for the demo formula
- export PIF, including demo compliance documents
- packaging sets
- manufacturing orders, including retained sample QA
- tests and test groups, including stability test group
- department settings
- demo company records
- advisory lists

To populate your new account with the above data, select the following checkbox during the account setup:

[Include demo data (Product Manager only) [?]]
**USERS AND USER SEATS**

**LOGIN AND USER ACCESS**

For security reasons and to ensure traceability for GMP, multiple login by different people using the same cosmetri account is not permitted. Any attempt to login when an account is already in use, will require using the ‘Force Logout’ function, thus ending any current open user session.

A user session is currently active for this account. Please logout from any other device or browser and try again. To force logout from all open sessions, click the button below:

![Force Logout](image)

Some networks are configured to automatically switch the IP address being broadcasted. For security reasons, connecting to a cosmetri application requires maintaining the same IP address during a user session. If the IP address is automatically switched, the user will be logged out of cosmetri. This issue is easily fixed – please contact cosmetri Support ([support@cosmetri.com](mailto:support@cosmetri.com)) and we will send you instructions on how to configure your network accordingly.

**USERS AND USER SEATS**

A **user** is an account with a username and password, assigned to a person. To access the Product Manager, a **user seat** needs to be available. To ensure traceability, a user account should only be used by **one** person. If that person leaves the company, the Administrator can permanently deactivate that user account, thus releasing a user seat.

If you are subscribed to cosmetri GMP, the same user account may be granted access to both applications, enabling them to login and switch between them seamlessly. This will require **two** available user seats – one in each application.

From April 2019, all **new** Product Manager plans include one restricted-access Administrator account, plus the following user seats:

- **Product Manager Starter** – 1 user seat
- **Product Manager Business** – 2 user seats
- **Product Manager Enterprise** - 3 user seats, with the option to subscribe additional user seats (annual version only).
To permanently deactivate a user account – for example when a member of staff leaves your company - click on the following icon in the Actions column:

Deactivating a user is permanent! All data and user logs for that user will be retained in your cosmetri account, ensuring maintenance of traceability and historical data. Click on ‘Permanently Deactivate User’ to confirm.

Once a user account has been permanently deactivated, the number of available user seats will be increased, enabling you to add one further user.

You can edit a user’s details and reset their password by clicking on the following icon:

This function is useful for example, if you wish to block access to a user or reset their password. Enter an email address that only you as Administrator have access to and click on ‘Update’. You can then use the ‘Reset Password’ button to receive an email at that address with a password reset link.
SUBSCRIBE ADDITIONAL USER SEATS

Product Manager Enterprise (Annual) plan subscribers may subscribe additional user seats on an annual basis. The current cost and subscription options for each additional are displayed in the ‘Product Manager Plan’ page when logged in as the Administrator. If you do not see the option to subscribe additional user seats, please upgrade to Product Manager Enterprise (Annual) first.

Select the number of user seats you wish to subscribe to Product Manager. Each new user seat subscription period is tied to the subscription cycle of your main plan. For example, if your Product Manager Enterprise plan renewal date is on 1 Jan 2021 and you subscribe an additional user seat on 1 Feb 2020, you will be immediately billed 11/12ths of the full annual price with renewal of the annual user seat subscription on 1 Jan 2021 when you will be billed for the full amount.

Confirm your acceptance of the cosmetri terms and conditions and click on ‘Submit’ to confirm the subscription. Payment will be taken using the payment method entered in the ‘Billing’ page and an invoice sent to the registered email address of the Administrator user.
**TERMINOLOGY**

Throughout this Getting Started Guide and full Product Manager user guide, reference will be made to certain key terms which are defined below.

**PROJECT**

A Project enables you collect information before you begin formulation, as the first step of the R&D process. This can be the initial request from a customer, or ideas you have for new products or an entire product line – describing the concept, target customer demographic, properties and benchmarks. If you provide business services (e.g. as a contract manufacturer or formulator), you can even provide a customer with restricted access to your Product Manager account to enter their own project details. An authorized user can approve a project and associate with it one or more products. Clone the project details to a product's 'Requirements' tab and further edit this data as the specification for the formulation stage. Set tasks for a project and custom project statuses.

**PRODUCT**

You create a product before you add your first formula. You can organize your products in product categories and customer groups. Certain regulatory data and documents must be entered at the product level and apply to all formulas associated with the product. A product can be associated with a project.

**FORMULA**

A formula is created by adding your raw materials to the formula composition at the required %w/w (percentage concentration, by weight) amounts. Product Manager then calculates the exact ingredients (INCI)/chemical breakdown of the formula. A formula is always associated with a specific product. You can easily clone a formula to enable you to quickly generate different versions. Certain regulatory data and documents must be entered at the formula level. A formula has two modes – draft and production. A production mode formula is the commercial version you use for compliance, dossier/PIF generation and manufacture. Setting a formula to production mode will activate the Product Manager Compliance Checker – the software will scan the entire product, formula and associated raw materials, reporting on any missing compliance data and documents and providing an overall percentage level of completion. A task will be generated for each action you required to take – for example, so that you can generate a complete product dossier/PIF.
RAW MATERIALS

A raw material consists of one or more ingredients. You can add single ingredients directly to your formula and they will be automatically saved as raw materials in your account. Alternatively, you can locate an ingredient in the database and with a single click add it as a raw material for later use in your formula. Once you're ready to go into production, raw material batches or lots can be created, based on the raw material parent version.

You can enter costs from your raw material supplier in any currency, which will enable you to calculate total raw materials costs for your formulas. If you want to track inventory, you can add your inventory to each raw material batch. This inventory is deducted automatically when you dispense a manufacturing order. Certain regulatory data and documents must be entered at the raw material level. A raw material parent or batch can be cloned with a single click to enable easy and fast creation of new batches. Raw materials can be organized in categories and tagged with any custom properties that you create in the global settings, enabling advanced filtering of your raw materials library.

INGREDIENTS

Product Manager accounts include 30,000+ single ingredients, searchable for example, by INCI, CAS, IUPAC, function, CI, glossary and chemical name. Ingredients are the building-blocks of your raw materials. Depending on your plan and compliance settings, regulatory data for ingredients is displayed. Details of currently available compliance data can be found on the following web page:

https://www.cosmetri.com/cosmetics-compliance-regulatory-software/

With the launch of v4 of Product Manager, approx 10,000 ingredients include detailed chemical properties and several thousand also include safety information such as GHS, safety and risk phrases, toxicity, etc. You can also manage your own notes, CLP, GHS and safety data at the ingredient-level as well as lookup latest REACH data.

PRODUCT INFORMATION FILE (PIF) / DOSSIER

Product dossiers or PIFs are required in certain regions, such as ASEAN and the EU and should include all current data and regulatory documents associated with your product and its raw materials. The Compliance Checker ensures that nothing is missing from your PIF and then generates this as a .zip file, with all the necessary documents included and referenced within a main PIF report.

For businesses in countries where a PIF is not a regulatory requirement, we recommend that you use cosmetri Product Manager to generate PIFs as ‘best practice’, since you will be able to generate comprehensive product reports and download these from the cloud to store locally.
If you use the manufacturing module, a batch protocol can be generated, documenting each batch of your product and ensuring traceability.

**COMPANIES**

Once a formula is ready for production it is important that each raw material in the formula is associated with a supplier and supplier batch. You may also optionally associate each raw material batch with a manufacturer and a customer. Suppliers must provide you with certain raw material data and documents which will be required for your batch protocols and for maintaining batch traceability according to GMP requirements. cosmetri Product Manager greatly simplifies the management of supplier/raw material relationships and associated documents and data.
GETTING STARTED

In every page and tab of the software, you’ll find useful help panels. Once you are familiar with using this aspect of the Product Manager you can click on ‘Hide Help Panel’ to hide the help panel, thus freeing up space on your screen.

For every field where you need to enter information, you’ll also see a tooltip icon [?] which you can rollover with the mouse to view a detailed explanation of the information you must enter.
CONFIGURE GLOBAL SETTINGS

Upon first subscribing or activating your account, you will be required to configure an Administrator user, as well as your first ‘standard’ type user. The Administrator user has access to the global settings, billing and plan pages but cannot function as a normal user.

Only one Administrator user is created for each account. If you are also subscribed to cosmetri GMP, this same user can switch between the settings and options for both applications.

We recommend that a member of staff is appointed as Administrator and has access to this account. Staff should be informed of who to contact in case of any requirement to change any settings, user permissions, etc.

ADMINISTRATOR SETTINGS

Make sure that you complete the ‘Administrator’ details (under ‘Global Settings’) such as your company name and address, as well as uploading a company logo.

This will ensure that you do not need to enter these details again, for example when setting each product’s owner details. Entering default company details for your account also ensures that certain reports generated by cosmetri Product Manager are branded with your company details and logo.
**DEFAULT SETTINGS**

In the Global Settings/Default Settings there are some important settings that you should adjust before starting. These include:

- **Base currency**
- **Inventory control** – for raw materials and packaging items
- **Approval** – configure quality assurance
- **Production** – enable or disable the manufacturing module and product ‘Batches’ tab. Define how your product batch numbers should be generated. Set options for development batches (R&D samples).
- **Custom task statuses**
- **Custom QA statuses**
- **Projects** – set custom statuses and which users can approve projects

**DEPARTMENTS**

You can configure which content and functionality can be accessed by users associated with any department they are assigned to. Click on the ‘Departments’ global settings tab and on ‘Add New’ to create your first department.

Select ‘View/edit’, ‘Hide’ or ‘View only’ to determine which pages and tabs of the software are accessible to a user who is assigned to that department. Click on ‘Save’ to save your changes.

Under ‘Users’, you can assign each user to a department as follows:
If you have set any custom dashboards (see p.14), you can select any dashboard to associate with the department.

Note – we recommend assigning a test user account to the department and testing your department settings by logging in as that user to verify that the permissions are as required.

**DASHBOARD**

You can create customized dashboards and associate any dashboard with a department. For departments settings, see p. 13.

Customized dashboards enables the logged-in user to view dashboard panels most relevant to their role and be able to click on a panel to open the associated page or tab.

**Note:** If the logged in user does not have permission to view any or all of the items associated with a panel, they will be restricted accordingly and see a count of the items they are allowed to view.

If a custom dashboard is not associated with a department, the logged in user will see a default dashboard, which is not editable.
For most panels, the list that is opened will be filtered accordingly to show those items.
Enter a name for the dashboard panel and click 'Add New' to create a new dashboard layout or select an existing layout to edit.

The maximum no. of dashboard panels is 12 (3 rows x 4 panels). The first row of four panels will be displayed. For each panel position, click to select from an available panel.

If a panel has already been selected for a panel position, it will not be available for selection in the list.

Click on ‘Save’ to save the dashboard.

Select any existing department so that any user associated with the department will see that dashboard layout. If a department is already associated with a dashboard, unset the association first by selecting the dashboard. The association can also be changed from the ‘Departments’ tab (see p.13).
**COMPLIANCE SETTINGS**

The ‘Compliance’ tab of the global settings enables you to configure which compliance zones are available for selection for your formulas, as well as the default zones that will be preselected. The availability of regulatory data depends on the plan you are currently subscribed to. Details of available compliance data and options can be found on the following web page:

https://www.cosmetri.com/cosmetics-compliance-regulatory-software/

All plans include EU compliance by default, including ingredient and regulatory data from CosIng and any SCCS Opinions. Subscribers to current Product Manager plans may also select one additional compliance zone.

Additional compliance zones for manual checking of compliance for your formulas can be configured. Click in the ‘Actions’ column to edit an existing compliance zone, or on ‘Add Custom Compliance Zone’ to create a new zone. For example, to configure ‘Australia’ as a custom compliance zone, you could enter the following settings, including a lookup URL to NICNAS:

<table>
<thead>
<tr>
<th>Compliance zone</th>
<th>Status</th>
<th>Custom URL</th>
<th>Title</th>
</tr>
</thead>
</table>

You can enter a maximum of five custom URLs for each compliance zone. To set the zone as default so that it is associated with all formulas, click in the ‘Default’ column once you have saved your compliance zone.


Open any formula at the ‘Specification’ tab and then select ‘Compliance’. The new default zone ‘Australia’ will now be available to select to associate with the formula. If it is not
already set as a default zone, click as follows to select the zone and then click on ‘Update Compliance Zones’.

Select the active compliance zone to manage compliance:

You can switch between available compliance zones, checking the checkboxes in the ‘Compliance Check’ column to confirm that each ingredient for each zone is compliant. Click on ‘Update’ to save these settings. If any checkbox is unchecked, the Compliance Checker will alert you and generate a task in the formula’s ‘Tasks’ tab.

**INGREDIENTS ADVISORY LISTS**

You can build custom advisory lists of ingredients that you will be alerted to when checking compliance for an associated formula. This provides exact control of ingredients according to your own internal policies, beyond any statutory regulations – such as formulas that
should be nano or paraben-free. Another use is to build custom lists of ingredients that are considered ‘borderline’ and are expected to be regulated in the future.

When building your formula, you can filter the list of available raw materials and ingredients by advisory lists.

Advisory lists can be associated with any combination of Customer group and/or compliance zone. For example, products for ‘Customer A’ in China and Taiwan, or for ‘all Customers in the USA’.

To access the advisory lists feature, click on the following menu item:

Click ‘Add New’ to create a new advisory list:

Each advisory list is assigned a unique ID in the sequence BL0001, BL0002, etc. Enter a title for the advisory list and an optional description (for your reference only). Select a color for the alert that will be shown. If possible select a unique color to assist in identifying these alerts when you check in the formula’s ‘Compliance’ tab:

Select which formulas the advisory list should be associated with by setting the Customer groups and compliance zones. By default, both are set to ‘All’, meaning that all formulas for all compliance zones will be associated with the advisory list:
If you wish to apply the advisory list to all formulas, we recommend that you keep both ‘All’ checkboxes checked. If you later add further compliance zones or Customer groups and associate new products/formulas with these, the advisory list will be automatically associated with these without any changes being required.

If you wish to only associate the advisory list with one or more Customer groups and/or compliance zones, uncheck the adjacent checkbox and click in the field to manually select the required associations:

For the associations that you select for Customer groups and compliance zones, the formula must be associated with both the Customer group and compliance zone. If you select ‘Customer A’ as the Customer group and ‘ASEAN’ as the compliance zone, an ingredient in the advisory list will only be displayed in the formula’s ‘Compliance’ tab if the product belongs to the ‘Customer A’ Customer group and the ASEAN compliance zone is currently selected for the formula.

**SELECT INGREDIENTS**

Add the ingredients that should appear in your advisory list. From the approx. 30,000 ingredients, you can enter an INCI, IUPAC, color index or glossary name string, or search by CAS number to locate any ingredient. From the matches found, click on the required ingredient.
Click on ‘Add’ to add the ingredient.

**Click on ‘Save’ to save your advisory list and the ingredients added to it.**

Once added, you’ll see the ingredient listed, with the standard actions available to assist in the management of your ingredients. Click on the following icon to enter notes for the ingredient that will be shown when you check compliance for a formula. These notes are specific to the ingredient as it appears in the advisory list. If you wish to enter general ingredients notes for the ingredient, use the icon to enter the notes.

**CHECKING FORMULA FOR ADVISORY LISTED INGREDIENTS**

If you have created ingredients advisory lists and an ingredient in the formula appears in an associated advisory list, a warning will be shown in the ‘Advisory’ column of the formula’s ‘Compliance’ tab.

<table>
<thead>
<tr>
<th>Ingredients Watch</th>
<th>Advisory</th>
<th>References</th>
<th>Regulations</th>
<th>Approve</th>
<th>Compliance Notes</th>
<th>Function</th>
</tr>
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<td></td>
<td>PERFUMING</td>
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</tr>
<tr>
<td><img src="image" alt="Ingredient black list notes" /></td>
<td><img src="image" alt="Checkmark" /></td>
<td><img src="image" alt="Warning" /></td>
<td><img src="image" alt="Checkmark" /></td>
<td><img src="image" alt="Checkmark" /></td>
<td>+</td>
<td>PERFUMING</td>
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<td><img src="image" alt="Checkmark" /></td>
<td>+</td>
<td>PERFUMING</td>
</tr>
</tbody>
</table>

Click on an alert to view any notes you added to the ingredient in the advisory list:
Once an advisory list has been created, you can easily use the following action to clone the entire advisory list:

This is useful if you have built an advisory list and require slight variations, for example for a specific customer or compliance zone.
ADD PRODUCT

Think of your product as a 'container' that holds certain meta data that apply to all associated formulas.

Adding a new product should take you no more than 30 seconds to complete. Go to 'Products / New'. To begin with you only need to enter the following items in the first tab.

a. Title
b. Customer group (if configured)
c. Product type
d. Type of exposure

TIP If you intend to add several products to Product Manager, it can be helpful to create different product categories to help you organize these. Click on 'edit categories' and create as many categories as you like. Then assign each product to the appropriate category.

If you have already configured Customer groups for your products (see ‘Managing Products by Customer Group’, p.50) you will need to assign every new product to a customer group. If you have not yet configured customer groups, your products will be visible to all users associated with your account!

Click 'Save' to add the product.
**ADD FORMULA**

You can create your first formula by clicking on the 'Add Formula' button. Or go to 'Products/List' and you will see your new product with the same 'Add Formula' button available.

*‘Add Formula’ button accessible from the product list:*

Enter an optional label (max. 15 characters) to help you identify the formula:

You can also enter a main ‘Shade’ for products that include different colors, such as for lip glosses or eye shadows. For detailed information about managing colors and shades, please see the Product Manager guide.

Formula version numbers are automatically assigned by Product Manager in the sequence 1.01, 1.02, 1.03 etc. It's good practice to keep your different versions and clone the current one before making further changes until you set a formula to production mode, which will be used for compliance, generating your product's dossier/PIF and for creating manufacturing orders.

**You must click once on 'Save' to create your formula, before you can open other tabs in the formula view.**
TIP From within a formula (or if you are in the product view), you can switch easily between formula versions as follows:

![Formula Version Selection]

**ENTER FORMULA COMPOSITION**

Now we are ready to build your formula’s composition. **Depending upon how complex your formula is, this part should take anywhere from 2-10 minutes to complete**, if you have the formula data to hand and have any multi-ingredient raw materials already entered or imported.

For each raw material in your formula you’ll need to know either the INCI or CAS no., the function(s) performed and the % concentration by weight (%w/w) or the amounts (in volume, weight and/or drops). If you require support in how to formulate using %w/w values, see ‘Enter formula composition – working with %w/w values’, p.24.

**Important!** In this step, we explain how to add single ingredients or existing raw materials to your formula composition. If you have any multi-ingredient raw materials, you’ll need to create or import these first. Please refer to ‘Creating multi-ingredient raw materials’ (p.48) for instructions.

**ADDITION INGREDIENTS TO COMPOSITION**

**Go to the Formula’s ‘Specification’ tab.** To add each ingredient to your formula composition, let’s first add an ingredient that we have not used before by entering part of an INCI name, color index (CI) or glossary name (for preservatives or UV filters).
TIP: If you enter a color index use the format e.g. ‘CI 10006’ (include the space after ‘CI’). Check if a version is available from the special colorants list as the colors often appear in both the main inventory and the colorants. Select the version with (COSMETIC COLORANT) displayed, e.g. ‘CI 10006 (COSMETIC COLORANT)’ to ensure that the special rules for displaying colorants in your labels are used.

Let’s try adding ‘Benzyl Alcohol’ by typing it in the following field.

There are three matches, because this ingredient appears in the main inventory as well as in the EU perfume allergens and preservatives lists. For EU compliance, if you intend to use the ingredient in your formula as e.g. a preservative, choose the one listed as ‘Benzyl Alcohol (Preservative)’. This will automatically add the function ‘PRESERVATIVE’.

IMPORTANT: We recommend that you do not select grouped ingredients (e.g. ASPERGILLUS/CAMELLIA SINENSIS LEAF FERMENT EXTRACT) in your formulas or raw material compositions. Most of these ingredients are not available for selection. These are listed for advisory reasons only. Select wherever possible the single ingredient version, such as ASPERGILLUS FERMENT, as shown below:
Perfume allergens should normally be added to the raw material’s composition (in the raw material’s ‘Composition’ tab) and not directly to your formula. For a guide on managing perfume allergens, see the Product Manager guide.

You can also add an ingredient by entering a CAS no. e.g. ‘100-51-6’. You can ignore any hyphens and for example, also enter ‘100516’. Click to select the required ingredient from any available matches.

MANAGING MULTIPLE COLORS/SHADES

For products available in different colors or shades, you can enter a main color/shade for the formula and add additional colors/shades.

For detailed information on managing colors/shades, see the Product Manager guide.
FORMULATING BY STAGES

You can optionally associate each raw material with a stage (or phase) in the ‘Stage’ column. This makes it possible for example, to add Aqua @10% at stage 1, @20% at stage 2, etc.

Select the stage you wish to associate with the raw material, as shown below.

After saving the formula composition, the raw materials will then be sorted in ascending order, with the raw materials associated with each stage listed in order of concentration.

The stages you associate with each raw material will be updated in the formula’s ‘Method’ tab – see ‘Entering method of manufacture’ (p. 38). If you prefer, once you have added the raw materials to your formula composition, you can associate them with any stages under ‘Method’, allowing two-way synchronization of the data in these two tabs.

SELECT RAW MATERIAL FUNCTIONS

Select any combination of functions for the raw material added to the formula.

Click in the Functions field and scroll down the list or type any letters to quickly find and select from matches, e.g. typing ‘sk’ will jump to the following ‘Masking’ function available for selection.

Click to select a function from the list:
Repeat the above step to add any further functions.

Enter the %w/w amount for the raw material and click 'Add' to add the raw material to the formula. Product Manager allows an accuracy of seven decimal points i.e. 0.0000001 %w/w, enabling micro-amounts of ingredients such as for color pigments to be calculated. **You do not need to enter your ingredients to this level of accuracy.** Just type the amount e.g. '34.5' and click outside of the field. The amount will then be automatically adjusted to 34.5000000.

Once you click on ‘Add’ the ingredient is saved as a raw material in your account and can now be found in your raw materials list. You’ll later be able to add properties to this raw material such as a trade name, manufacturer and supplier information, as well as any required regulatory data and documents.

**Adding Raw Materials by Trade Name**

Now that the new ingredient has been added to a formula and saved as a raw material, you’ll be able to add that same raw material to other formulas by entering the ‘Trade Name’ to locate it, as shown in the example of ‘Shea Butter’ below:
If you add an ingredient by entering a CAS or INCI, Product Manager will recognize if this raw material already exists in your account and will prompt you to use this. Just click on the 'Use' button to select from any available batch. **Select 'PARENT' if you do not require batches at this stage.**

Repeat the above steps for each raw material and **make sure that the total composition comes to 100%.**

You must click on ‘Save’ to save your formula composition!

---

**WORKING WITH %w/w VALUES IN YOUR FORMULA**

It is important that you understand the principle of entering %w/w concentrations in your formula’s composition. This is the industry standard method for formulation of cosmetic products.

In percentage solutions, the weight of a solute is expressed as a percentage of the total solution in weight. By *solute* we mean, a raw material that is used in your formula, whereas *solution* refers to the total resultant mixture of your product.

The %w/w formula is expressed as follows:

\[
\frac{\text{weight}}{\text{weight}} \times 100 = \frac{\text{weight of solute}}{\text{weight of solution}}
\]

Note that ‘weight’ refers to mass (i.e. as measured on scales).

If a raw material in your formula is a **liquid** and measured by **volume**, you must know the mass of this, which requires a **density value**.

**TIP** We recommend selecting ‘by weight’ as the unit of measurement used for raw materials, since this will not require any density/specific gravity value to be entered.

---

**Raw material ‘Unit of measurement’ value, in ‘Raw Material / Information’ tab:**
Let's take an example:

An oil in your formula has a density of 0.900 g/ml. If the total mass of your solution is 100 g, you first need to know the mass of the oil. If you were making 100 g of your product and add 50 ml of the oil during manufacture, this will be $50 \times 0.9 \text{ g/ml} = 45 \text{ g}$. Therefore, in 100 g of your product's solution, 45 g of this will be your oil, meaning that it has a %w/w of 45.000000.

Using %w/w is the simplest form of entering a formula's composition because by using weights consistently throughout the formulation, the total mass of the solution is always equal to the sum of the mass of each of the solutes. In other words, if you add 45.000 g of a solute dissolved in 55.000 g of solvent, you will have a resulting solute concentration of 45.000000 % and an exact mass of 100.000000 g.

**FORMULATE USING AMOUNTS**

If you do not know the %w/w values, Product Manager can calculate these for you. If any of your raw materials are measured by volume or drops, you will need the density / specific gravity or drops per g of each of these, so that these volumes can be converted to weight.

Firstly, add the raw materials to your composition as explained in the previous step. Instead of entering the %w/w values, click ‘Save’ to save the composition and then click on the following button:

This will open a popup with the raw materials listed, as shown in the example view below:
Depending on whether the raw material is measured by **volume**, or **weight** (as set in the raw material's 'Information' tab), you can select the unit that you wish to enter your amounts, as follows:

**By volume:**
- L
- ml
- US gallon
- US liquid quart
- US liquid pint
- US fluid ounce
- drops

**By weight:**
- kg
- lb.
- oz

---

**TIP** If a raw material is measured by volume, check carefully that the **density** or **drops per g** value is accurate, otherwise the resultant %w/w calculations will be wrong. If the default density of 1.000 is used, you will see the following warning:
Note - If any raw material unit or measurement and density value is locked, this is because the raw material batch is associated with a manufacturing order.

Enter the amount in the ‘Amount’ column for each raw material. As you enter these values, you will see the ‘Total weight’ value automatically increment. If you know the total weight of the composition, use this value to double-check that the weights are consistent with the calculated value.

Once you have entered all amounts and verified that any density and drops per g values are correct, click on ‘Update Formula %w/w’ button to close the popup.

You will now see that your formula in the main composition tab now has the %w/w values entered.

**CONFIRM FORMULA**

As a safeguard, the accuracy of your formula composition must be confirmed, otherwise the Compliance Checker will generate a task requiring this action:
Complete your formula and click save, before you use the ‘Confirm’ function to confirm the accuracy of your formula.

**Note** - If you subsequently click on ‘Save’ you will need to again approve the formula!
CHECK COMPLIANCE

Let’s now check the ingredients breakdown by clicking on the following tab:

Version 4 of Product Manager includes new features and tools for managing the compliance of your formulas, as well as global compliance data options. Please refer to the main Product Manager user guide for full details.


The ‘Compliance’ tab shows the aggregate %w/w concentrations of each ingredient in your formula composition, in order of concentration. Depending on the currently selected compliance country/zone, selected perfume allergens are listed at the top under PERFUME ALLERGENS [+]. For detailed instructions on managing perfume allergens, see the Product Manager guide.

All plans include EU compliance data by default, plus regulatory data for one further selected country/zone. Subscribers to the Product Manager ‘Compliance Pack’ plan receive access to all currently available compliance data. To check the latest plans and prices click below:


To configure compliance countries/ zones please refer to the main Product Manager user guide.

Once configured by your Administrator, select the required compliance country/zone for the formula:
Look in the ‘Regulations’ column for any regulated ingredients and click on the alert icon to open a popup with the regulatory data. You can easily check if any of your ingredients are regulated and if the maximum allowed concentrations or other restrictions are acceptable.

If you have configured other compliance zones for manual compliance checking (see p.16), click on any lookup URLs that you have entered for the selected compliance zone to check the compliance for each ingredient:

If you have created ingredients advisory lists and an ingredient in the formula appears in an associated list, a warning will be shown in the ‘Advisory’ column. Click on the warning symbol to view any notes entered for that ingredient in the advisory list.
For each selected compliance country/zone, you can confirm compliance of each ingredient by checking a checkbox. Click on the ‘Update’ button directly below the checkboxes to save these settings.

The Compliance Checker will warn you if any ingredient is not approved for any compliance country/zone associated with the formula.

In the ‘Compliance Notes’ column you can also maintain compliance notes for the ingredient. This is useful for resolving any issues, especially for achieving harmonized compliance across multiple compliance countries/zones.

Note – these notes are specific to the compliance of the ingredient for the currently selected formula only and apply to all associated compliance countries/zones.

If you wish to manage ingredient notes and data, such as safety/toxicity and GHS information, this information can be managed by clicking on an ingredient link in the ‘Compliance’ or ‘Safety’ tab of the formula’s ‘Specification’:
<table>
<thead>
<tr>
<th>Ingredient</th>
<th>CAS Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>SIMMONDSIA CHINENSIS SEED OIL</td>
<td>90045-98-0</td>
</tr>
<tr>
<td>BENZYL ALCOHOL</td>
<td>100-51-6</td>
</tr>
<tr>
<td>SALICYLIC ACID</td>
<td>69-72-7</td>
</tr>
<tr>
<td>SORBIC ACID</td>
<td>110-44-1</td>
</tr>
</tbody>
</table>

*Ingredient data*
ENTER THE METHOD OF MANUFACTURE

The formula’s ‘Method’ tab you can enter and maintain the instructions used for manufacturing your product. These instructions are required for your product information files (PIFs) / dossiers, batch protocols and batch tickets.

Your method of manufacture is entered as a series of stages or phases, consisting of the following fields:

**Stage ID:**
Select a stage number from the select menu. Clicking on the ‘Sort’ button will then re-order the stages/phases in ascending numerical order.

**Stage Title:**
Enter a short title for ease of identification of the stage/phase.

**Raw Materials:**
Use this field to optionally associate the stage/phase with any raw materials in the formula. Click in the field to select one or more of the raw materials in your formula:
These associations will also be shown in the Formula Composition, enabling two-way synchronization of the data between these tabs. If you wish to associate the same raw material with more than one stage, e.g. Aqua @10% at stage 1, @20% at stage 2, etc. you must **first add each of these raw materials separately** in the Formula Composition at the correct %w/w concentration.

**Details:**

This is where you enter the detailed manufacturing instructions for the associated phase. Drag the bottom right corner of the text field if you require more space:

If you need to refer to a specific raw material in these instructions, you can use the following tool to select a raw material and copy the trade name to the clipboard. Use Ctrl + V (or Command + V for Mac) to paste the text into your text at the point where you have placed the mouse cursor:

**Remember to click on ‘Save’ to save your data!**
ACTIVATE COMPLIANCE CHECKER

Your newly created formula will now be in ‘Draft’ mode. Go to ‘Products / List’ in the main menu and locate the formula. For any draft-mode formula, you can click on the following checkbox to activate the Compliance Checker:

Product Manager will then scan the product, formula and all associated raw materials for missing data and documents required for compliance and generate tasks for each required action.

Click on ‘Edit’ in the ‘Actions’ column to open the formula:

You'll now see a status of the current level of completion.

Click on the status bar to view all open tasks, or go to the ‘Tasks’ tab.
CHECK COMPLIANCE TASKS

Now that we’ve set up your formula and have a compliant composition we need to add in all those bits and pieces of missing information and documents - at raw material, formula and product levels. Product Manager will guide you every step of the way!

In the 'Formula' view of the 'Tasks' tab, you'll then see a complete list of actions you need to take. Each task is clearly described:

In the 'Actions' column, for each task click on the 'Edit' icon and you'll be taken to the page and tab where you need to perform the action.

In many cases, you'll find additional advice by clicking on a '?' for any field. Check with your supplier or safety assessor if you require information or are unsure what to enter.

The Compliance Checker checks for required data and documents for generating complete batch protocols, required for batch traceability once your product is manufactured and commercially available. If you do not require batch-related data and documents, you can de-activate these tasks by clicking the following checkbox:
This will hide all tasks that are associated with raw materials batches – such as for CoA and SDS documents and required supplier data. Your PIFs will not include this data. You Compliance Checker % level of completion will be re-calculated.

**TIP** For any task, you can click on the ‘Notes’ icon in the ‘Actions’ menu to create a note that you use to remind yourself or another team member of anything you want to mention about the task, as well as to set any status and deadline. Each user will see these notes in their dashboard when they login to Product Manager.

Complete a task and then (if in the ‘Product’ or ‘Raw Material’ view) click on the ‘Back to Tasks’ button to return to the task list. If you are still in the formula view, just click back on the ‘Tasks’ tab after you’ve saved the change that you made.

Each task you complete can then be hidden from tasks list and the % completion status bar will increase until you have a 100% complete product and formula.
MANAGING DOCUMENTS

Some of the tasks generated by the Compliance Checker will remind you to upload a document required for compliance.

Documents can be uploaded to the following type of item in cosmetri Product Manager.

- Product
- Formula
- Raw Material
- Packaging Item
- Test

If you use the ‘Tasks’ tab to upload required compliance documents, click in the ‘Actions’ column for the task, to be taken to the document upload tab for that item:

DOCUMENT TYPES

A range of document types (‘Doc Type’) are available, depending on the type of item you are viewing. You must select the appropriate document type before you can upload the document. Using the correct doc type ensures that Product Manager can locate each document and generate the required reports, such as your PIF or batch protocols.
### TIP
You can also upload non-compliance documents, such as your product brochure or meeting memos related to a specific product. For these types of documents, select the doc type ‘CUST’.

#### UPLOAD DOCUMENT

After selecting the appropriate Doc Type, enter an optional document title and comment. To upload a document from your local drive, either drag-and-drop the file from an opened folder to the blue file zone, or click in this zone to use the standard file browser and navigate through your hard drive the file you wish to upload:

Product Manager allows files of a maximum of 5Mb and in most common formats, including .pdf, .jpg, .doc, .docx, .rtf, .jpg, .txt, .png, .gif, .csv, .xls and .xlsx.

Click on ‘Save / Upload’ to upload the file.
**EXPORT PRODUCT INFORMATION FILE (PIF) OR DOSSIER**

In the formula view, click on 'Set to Production Mode' once you have a formula that you will use for manufacturing and/or require a PIF for.

![Set to Production Mode](image)

**TIP** Once you set a formula to production mode, for compliance and traceability reasons you cannot reset it to draft mode. You can however clone your production formula at any time, thus ensuring that you have a copy of the formula in 'draft' status.

Click on the 'Dossier/PIF Export' button to generate the PIF. A dialogue box will warn you of any missing data.

![Dossier/PIF Export](image)

If 'ASEAN' is selected as one of the compliance zones for your formula, you will also see a button enabling you to export an ASEAN version PIF.

Your dossier/PIF will be exported in .zip format – normally within 10-15 seconds. Save this .zip file to a destination on your hard-drive and then double-click this. Most browsers can automatically open a .zip file, once downloaded.

Inside the .zip folder you will find a folder named after your product and formula version. You must copy/paste or drag and drop this to a destination of your choice on your hard drive before opening it.

You'll also require a PDF reader, such as Adobe Acrobat or Foxit to view the PDF files in your PIF.
Inside the folder, you will find the main PIF info file (with _INFO in the filename). The file with _COMP is a file detailing your formula's composition. If you decide to submit an exact percentage concentration formula (for example to the CPNP if you require EU compliance) you'll need this file.

*Example view of the PIF folder:*

Open the main _INFO.pdf file and you'll see a complete, detailed document describing all regulatory data for your product. Where further data is referenced, a link to the document on the server is inserted and a copy of the document will also be found in the PIF folder under the same name.

Note: To open an associated document directly by clicking on a link in the PDF report, you will need to login to Product Manager to view the document in the cloud. You can also browse the PIF folder that you unzipped to open a local version of the file.
**USEFUL TIPS**

**CREATING MULTI-INGREDIENT RAW MATERIALS**

To create a multi-ingredient raw material - go to ‘Raw Materials/New’ in the main menu. In the 'Information' tab enter a 'Trade Name'. Click on 'Save' and then click on the 'Composition' tab.

**Note** – you will usually find the raw material composition in Section 3 of the SDS (or MSDS) document received from your supplier. If this information is not included, please contact the supplier.

Selecting an ingredient in the raw material's composition is almost identical to adding an ingredient to your formula.

For EU compliance, you can also click on one of the following four buttons if you wish to browse or search for one of the ingredients from these lists/annexes.

Ingredients added directly to your raw material from one of these separate lists will automatically assume the following associated function, which cannot be changed. You may however assign further functions.

- **Perfume Allergens** | PERFUMING
- **Preservatives** | PRESERVATIVE
- **Colors** | COSMETIC COLORANT
- **UV Filters** | UV FILTER

When you add the raw material to your formula, the functions set for each ingredient will then be displayed in the formula's 'Compliance' tab.

**IMPORTANT**: We recommend that you do not select grouped ingredients (e.g. ASPERGILLUS/CAMELLIA SINENSIS LEAF FERMENT EXTRACT) in your formulas or raw material compositions. These are listed for advisory reasons only. Select wherever possible the single ingredient version, such as ASPERGILLUS FERMENT, as shown below:
For detailed instructions on managing perfume allergens, see the Product Manager guide: [https://www.cosmetri.com/docs/cosmetri-Product-Manager-guide.pdf](https://www.cosmetri.com/docs/cosmetri-Product-Manager-guide.pdf)

Now enter the **min. %w/w** and **max. %w/w** values for the ingredient in your raw material. If you know the exact percentage enter the same value in both fields.

![Ingredient Details Table]

Once you have entered the ingredient details, click on 'Add New' to add a further ingredient.

**Click 'Save' to complete this step and to save your raw material composition!**

Your multi-ingredient raw material will now be available for selection by Trade Name when adding this to your formula's composition.
MANAGING PRODUCTS BY CUSTOMER GROUP

As well as organizing your products by category, you can also add each project and product to a customer group. This is useful for companies managing products for different customers or for multiple product lines or brands. Configuring customer groups enables you to assign which users can view these products.

To access the customer settings, click on the menu item ‘Customer Groups’.

If you wish to restrict users from accessing the customers page, select ‘Hide’ for that option in the ‘Departments’ global settings.

Click on ‘Add New’ to create your first customer group. Enter a title for the group and then click in ‘Products’ to select which products should belong to that group. You can only add a product to one group, so the list will display only the currently unassigned products.

Note - Once you create your first customer group and wish to use these to control which users can access which products, it is important that ALL products are assigned to a group. Non-assigned products will be visible to all users!

As you add products to groups and save each group you’ll be alerted if any products are currently unassigned.

Now select the users you wish to have access to that group:
Add an optional comment for the group and then click on ‘Save’:

**Note:** If you later add a new user to your account, remember to add them to any customer groups, otherwise they will not be able to access any products. To assist you, the Administrator user can select any user in the ‘Users & Seats’ tab of the global settings and directly assign the required customer groups to that user.

In the main products list, you can now view your products by customer using the following menu:

Once the first Customer group has been created, adding a new product will require that you assign this to a customer group before saving is possible. If you clone a product, you will be prompted to assign the cloned version to a customer group.

---

**CONFIGURE AND USE QUICK LINKS**

Quick links enable you to bookmark the product/formula versions that you require regular access to. You can then select a product/formula and navigate between the following associated resources while keeping the product/formula active.
The quick links you set are specific to your user account, enabling each user in your team to configure their own quick link preferences.

To add a product/formula to your quick links menu, click on the following checkbox in the formula view:
Or from the main product list:

<table>
<thead>
<tr>
<th>Product Title</th>
<th>Product Refer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bath Foam Demo</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Quick Link</th>
<th>Formula Version</th>
<th>Formula Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔</td>
<td>1.01 Neutral (Clear)</td>
<td>123.456</td>
</tr>
<tr>
<td></td>
<td>1.02</td>
<td></td>
</tr>
</tbody>
</table>

You'll then see the product/formula listed in your quick links menu:

Select any of these quick links to open that product/formula. All associated resources will be listed in the five sub-menus displayed in the navigation bar below:
Select any item from one of these menus to open that item.

The selected product/formula quick link will remain active, making it possible to navigate quickly between associated items. For example, you can open one of its raw materials, make a change to this and then open the latest manufacturing order associated with the product/formula.

If a sub-menu list is long, you can use the search function to quickly find a match. For example, in the ‘Raw materials’ sub-menu enter ‘Water’ to display all associated raw materials.

If you need to return to the product or formula level for the selected quick link, click on either of the following icons to the right of the quick links menu:
WORKING WITH SERVICE PROVIDERS

cosmetri Product Manager can be used as a secure collaboration platform, enabling you to work together with your team as well as any service providers, such as a formulator, safety assessor, laboratory or even your suppliers. By using a common set of software tools and shared data standards and workflows, you can collaborate more securely and efficiently.

You can grant a service provider access to your cosmetri Product Manager account, assign them tasks or reminders and even have them log their worked hours in their timesheet.

A service provider has a special type of cosmetri user account which must be approved by cosmetri. This account enables the service provider to securely log in and out of any of their customer accounts they have been granted to, as well as see a status of their tasks, notes and tests assigned to them.

GRANTING ACCESS TO A SERVICE PROVIDER

If you wish to grant your service provider access to your cosmetri Product Manager account and the service provider already uses Product Manager, ask them for their cosmetri Administrator username. In Global Settings under ‘Select user type’, select ‘Service Provider’, then enter the service provider’s username and then click on ‘Verify’:

If the username is an authorized service provider account, the form below will then be populated with the service provider’s details:
Enter a unique username for the account that you will create, which is then linked with the service provider’s account. If you have already setup at least one customer group, select any group(s) that the service provider should have permission to view. Clicking on ‘Add User’ will create the user account. Your service provider will receive an email notifying them that you have granted access to your account and instruct them to authorize the new account and create a password.

**INVITE A SERVICE PROVIDER**

If you wish to use cosmetri Product Manager to securely collaborate with your service provider and they do not yet use Product Manager you can easily invite them to join. Click on ‘Team/Service Providers’ and enter any email addresses of service providers who you would like to invite. Press enter or return on your keyboard to enter multiple email addresses and then on ‘Invite’ to send the email invitations.

Each recipient will receive an email from cosmetri instructing them in how to create a service provider account and link to you.

**SETTING PERMISSIONS AND ACCESS**

Service providers logged in to your account will not be able to access the following:

- Customer menu
- Team / Service Providers
If you wish to restrict which products your service provider can access, see ‘Managing products by Customer Group’, page 50.

To further restrict which content and functions are accessible to the service provider, you can assign them to a Department, details of which can be found under ‘Configure Global Settings’ (p.12).

If you at any time need to revoke access of the service provider to your account, click on the following icon in the ‘Actions’ column of the ‘Users’ tab in your Global Settings:
To find out more and to receive a free software trial and demonstration, visit

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