

## Information: How to create new customer accounts for OPTIME

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Dear Service Partner,

we are happy that you have chosen the Schaeffler OPTIME solution to provide condition monitoring services to your customer and determined to provide a great and ever increasing service experience to you. In order to deliver your service to your customers you might want to create a direct access (log-in) for your customer for OPTIME. Due to export control regulations Schaeffler needs to follow a strict process to ensure that direct access (Log-In) to OPTIME is only provided to companies and individuals which are not banned by the applicable export control regulations. Therefore in order to set-up direct access to OPTIME for your customers, please follow the process described below.

**All information that is provided to Schaeffler is treated strictly confidential and only provided to a minimal group of people which require the information to perform the necessary export control checks or administrate the OPTIME solution.**

We kindly point out that following this process does not free you from performing all steps and checks yourself which are necessary to follow all applicable export control regulations.

Best Regards

Your Schaeffler OPTIME Team

### Schaeffler Technologies AG & Co. KG

Georg-Schäfer-Straße 30, 97421 Schweinfurt, Telefon +49 9721 91 0, Telefax +49 9721 91 3435, [www.schaeffler.com](http://www.schaeffler.com), Sitz: Herzogenaurach, Registergericht: AG Fürth, HRA10129 · **Persönlich haftende Gesellschafterin:** Schaeffler AG, Sitz Gesellschafterin: Herzogenaurach, Registergericht Gesellschafterin: AG Fürth, HRB14738 · **Vorstand:** Klaus Rosenfeld (Vors.), Dr. Klaus Patzak, Andreas Schick, Corinna Schittenhelm, Michael Söding, Dr. Stefan Spindler, Uwe Wagner, Matthias Zink **Bankverbindung:** Commerzbank Nürnberg, BIC: DRESDEFF760, IBAN: DE35 7608 0040 0121 0464 00, USt-IdNr.: DE 291 636 029

# Attachment

## Process to create access to OPTIME for new users:

### Step 1

Ensure that a tenant for the respective customer is already created within OPTIME.

### Step 2

Receive the following information from your customer:

- Company Name
- Company Address (Street, Nr., ZIP Code, City, Country)
- Industry/Sector of the Company

Receive the following information from each individual employee of your customer which would like to get access (a Log-In) to OPTIME:

- Full Name
- E-Mail Address (should be a company e-mail, not a private e-mail)

### Step 3

Fill the information in the provided excel file ("OPTIME\_NEW CUSTOMERS\_Export Control\_Service Provider Template.xlsx) and e-mail the file with the following additional information to [new\\_user\\_optime@schaeffler.com](mailto:new_user_optime@schaeffler.com).

Please include the following information in your e-mail.

- Your own company name
- Tenant Name
- Admin User Name of the Tenant from your Company
- Your contact person name at Schaeffler in case there are internal questions at Schaeffler

You can use the provided template on the next page.

### Step 4

Wait for a confirmation e-mail that the export control check has been performed and user log-ins have been created from Schaeffler. Please be noted that this process can take up to 3 working days since certain steps of export control checks may be performed manually.

**Tipp:** In order to ensure a timely process and swift experience for your customer, please collect ALL users from your customer which would like to get access to OPTIME and provide them at the same time.

# Attachment

## Template for e-mails to new\_user\_optime@schaeffler.com:

Dear OPTIME Team,

We kindly ask you to create user accounts for our customer with the following information:

- Company Name:
- Company Address:
- Sector:

User 1:

- Name:
- E-Mail:

User 2:

- Name:
- E-Mail:

Please create the user accounts for the tenant with the following name:

- Tenant Name:

For further questions please refer to the following contact persons:

- Contact Person on my side (admin user for the tenant):
- Contact Person on Schaeffler side:

Best Regards

**!** Please provide an e-mail signature with your company information