

Third Party Risk Management

Third Party Process – How to add Contacts

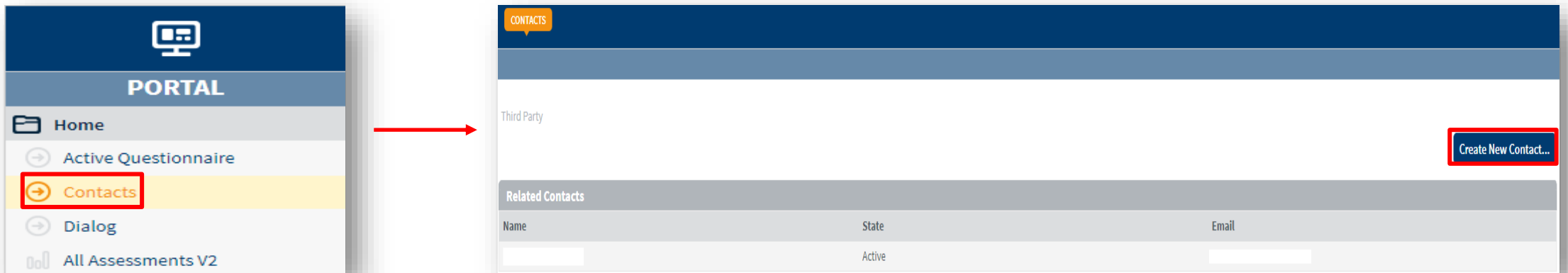
August 2022
Version 2.0

INTERNAL


01

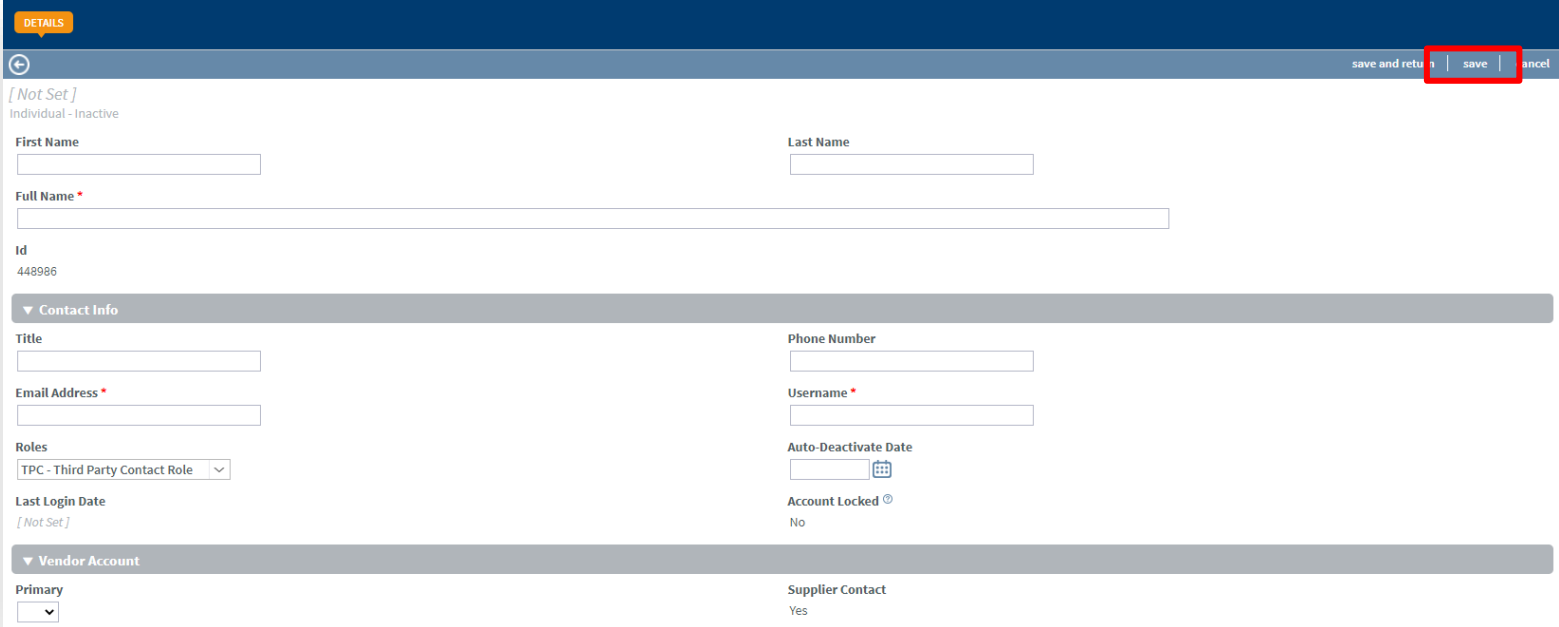
Giving Colleagues Access to the Questionnaires

- ✓ Under “Contacts” in the left menu is an overview of the registered contacts for your organization
- ✓ By clicking the dark blue button on the right, new contacts can be added, which is necessary in order to make the questionnaire accessible for your colleagues



01a Adding new Contacts

- ✓ After clicking “Create New Contact” you will be forwarded to this view
- ✓ Required fields are marked by the * 
- ✓ The username should be identical to the email address
- ✓ After filling out this template, hit the “save” button on the top right

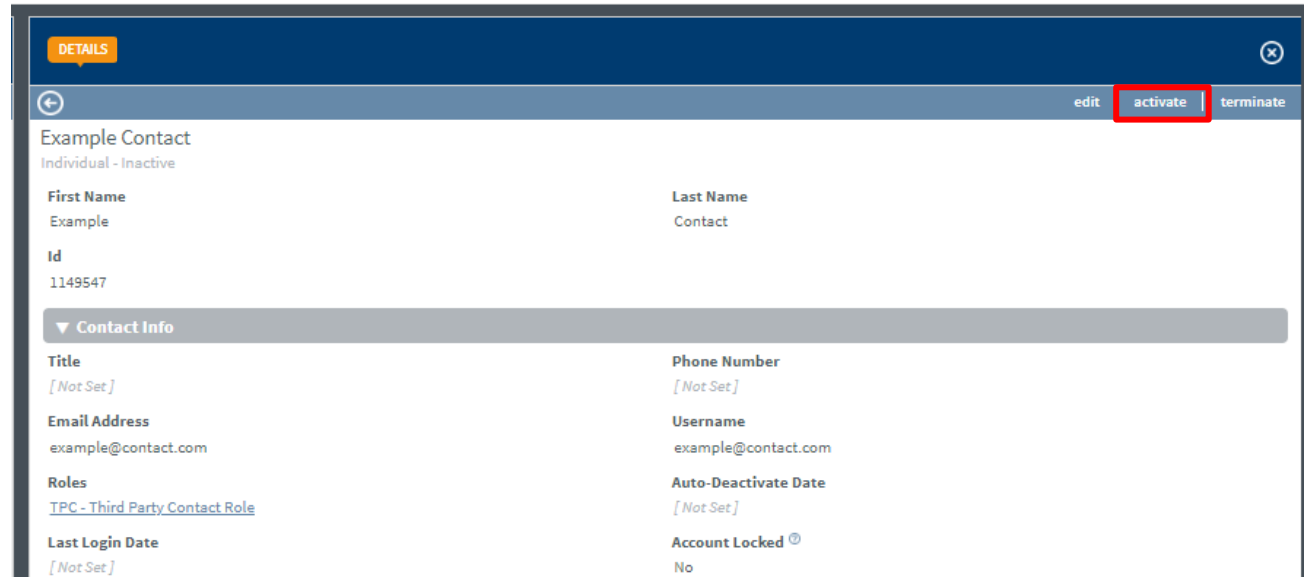


The screenshot shows the SAP 'DETAILS' view for creating a new contact. The form is titled 'DETAILS' and includes a navigation bar with 'save and return', 'save', and 'cancel' buttons. The 'save' button is highlighted with a red box. The form contains the following fields:

- [Not Set]**
Individual - Inactive
- First Name** (text input)
- Last Name** (text input)
- Full Name *** (text input, required)
- Id**
448986
- Contact Info** (collapsible section)
 - Title** (text input)
 - Phone Number** (text input)
 - Email Address *** (text input, required)
 - Username *** (text input, required)
 - Roles**
TPC - Third Party Contact Role (dropdown)
 - Auto-Deactivate Date** (calendar icon)
 - Account Locked**
No
- Vendor Account** (collapsible section)
 - Primary** (checkbox)
 - Supplier Contact**
Yes

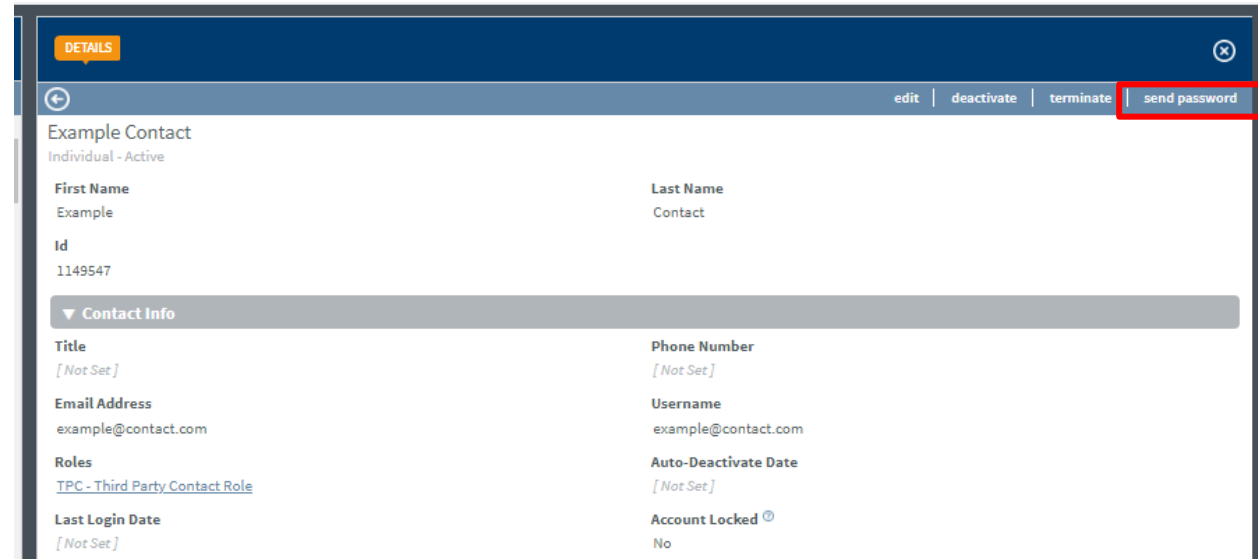
01b Adding new Contacts

- ✓ Click “activate”
- ✓ Click “send password”
- ✓ The new contact now received their login credentials via e-mail



01b Adding new Contacts

- ✓ Click “activate”
- ✓ Click “**send password**”
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01c Adding new Contacts

- ✓ The newly created contact is now shown in the contacts overview
- ✓ Contacts listed here will be able to log in to ProcessUnity and answer every questionnaire necessary



The screenshot shows a web interface for 'CONTACTS'. At the top, there is a dark blue header with a white 'CONTACTS' button. Below the header, the text 'Third Party' is displayed. A table titled 'Related Individuals' is shown with three columns: 'Name', 'Roles', and 'Email Address'. The table contains two rows, each with a red-bordered input box in the 'Name' column and 'TPC - Third Party Contact Role' in the 'Roles' column. The 'Email Address' column is empty for both rows.

Name	Roles	Email Address
<input type="text"/>	TPC - Third Party Contact Role	
<input type="text"/>	TPC - Third Party Contact Role	