Third Party Risk Management
Third Party Process – How to add Contacts

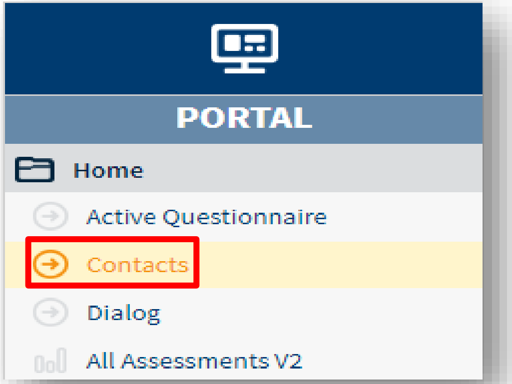
August 2022
Version 2.0

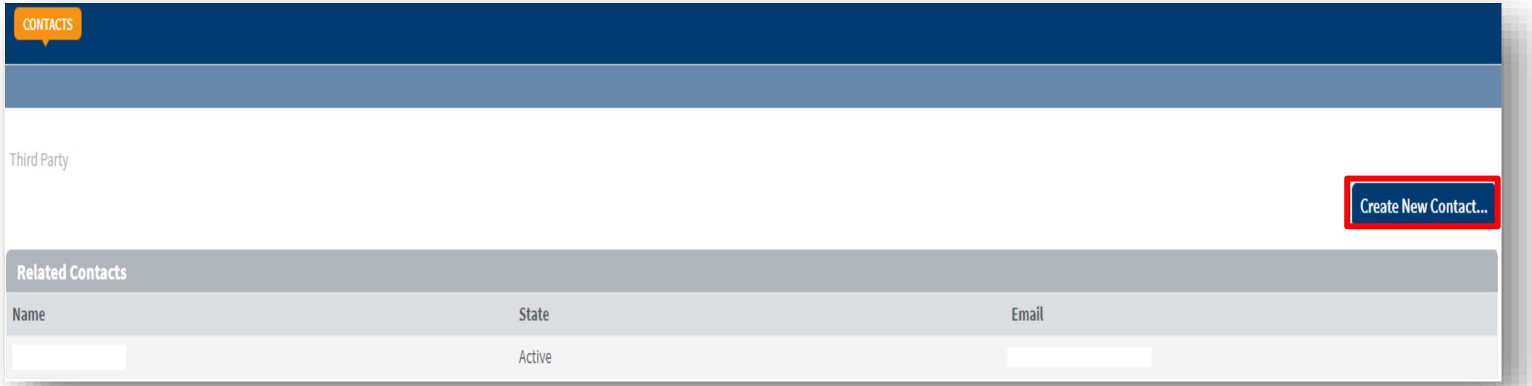
INTERNAL

THE BEST RUN SAP

01 Giving Colleagues Access to the Questionnaires

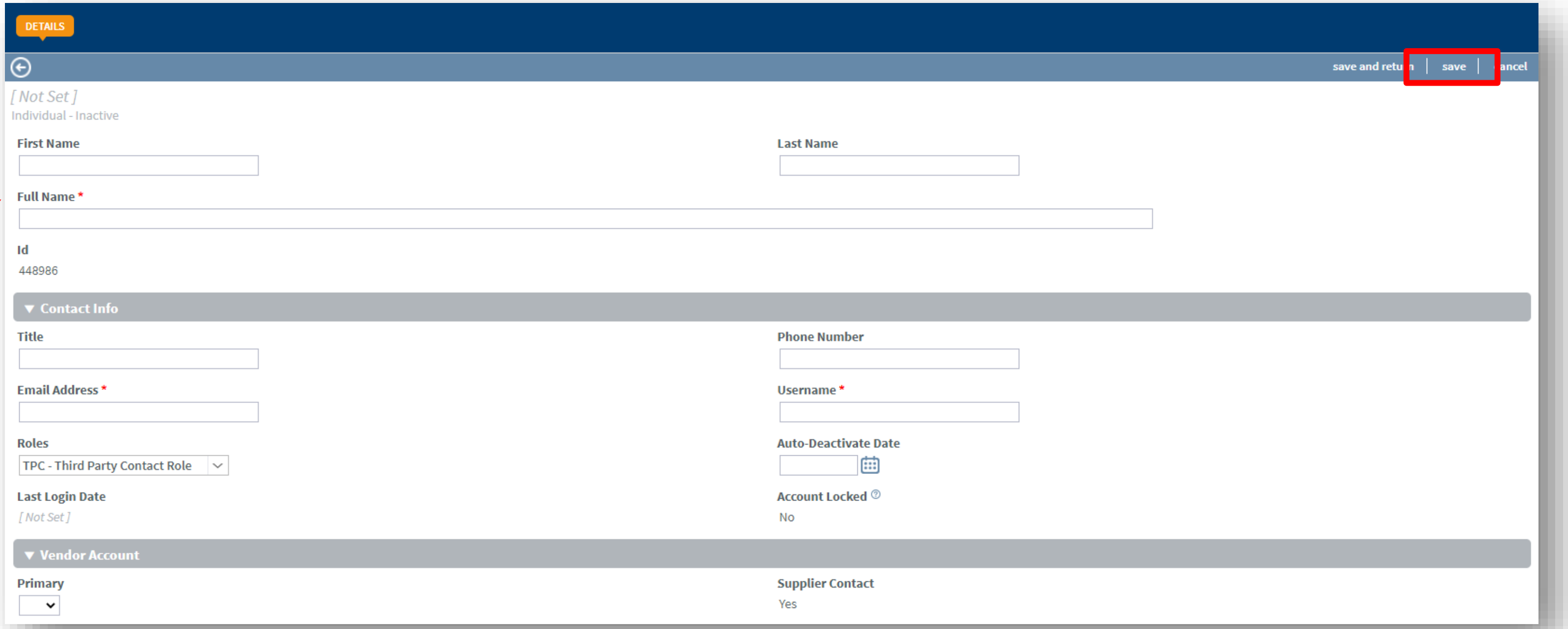
- ✓ Under “Contacts” in the left menu is an overview of the registered contacts for your organization
- ✓ By clicking the dark blue button on the right, new contacts can be added, which is necessary in order to make the questionnaire accessible for your colleagues





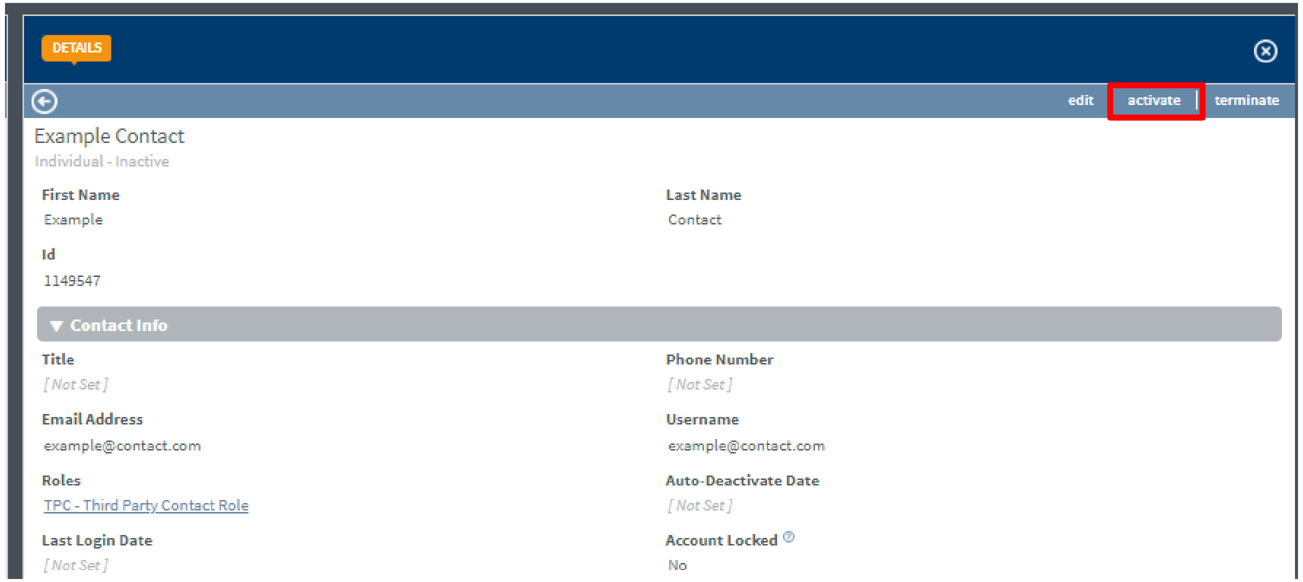
01a Adding new Contacts

- ✓ 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



01b Adding new Contacts

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



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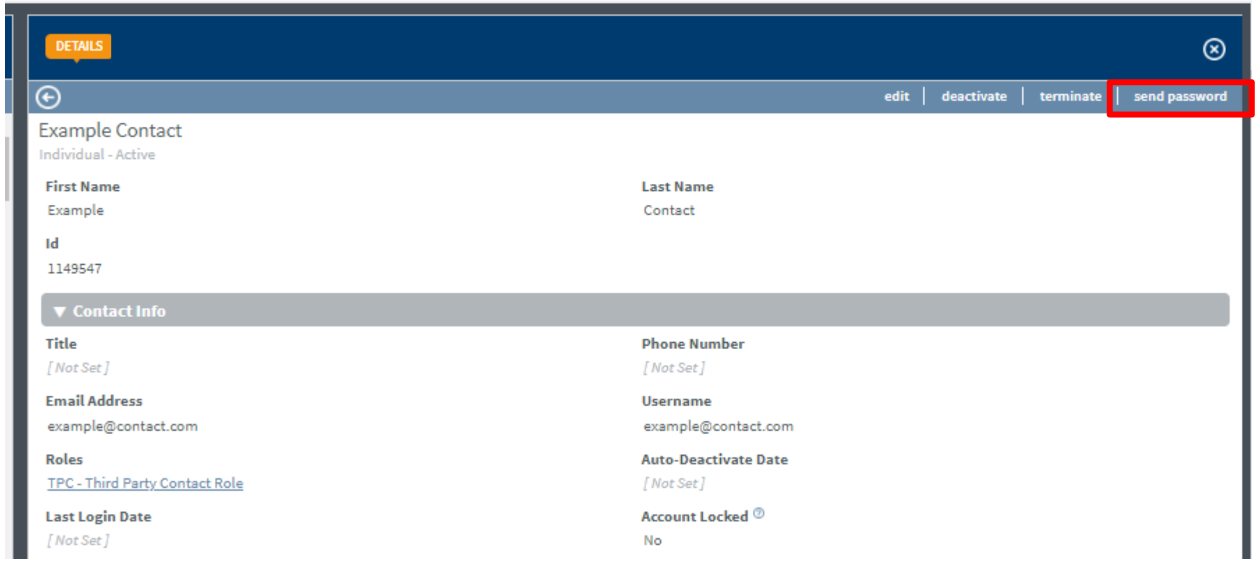

01c Adding new Contacts

- ✓ 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