

How to Add Third Parties?

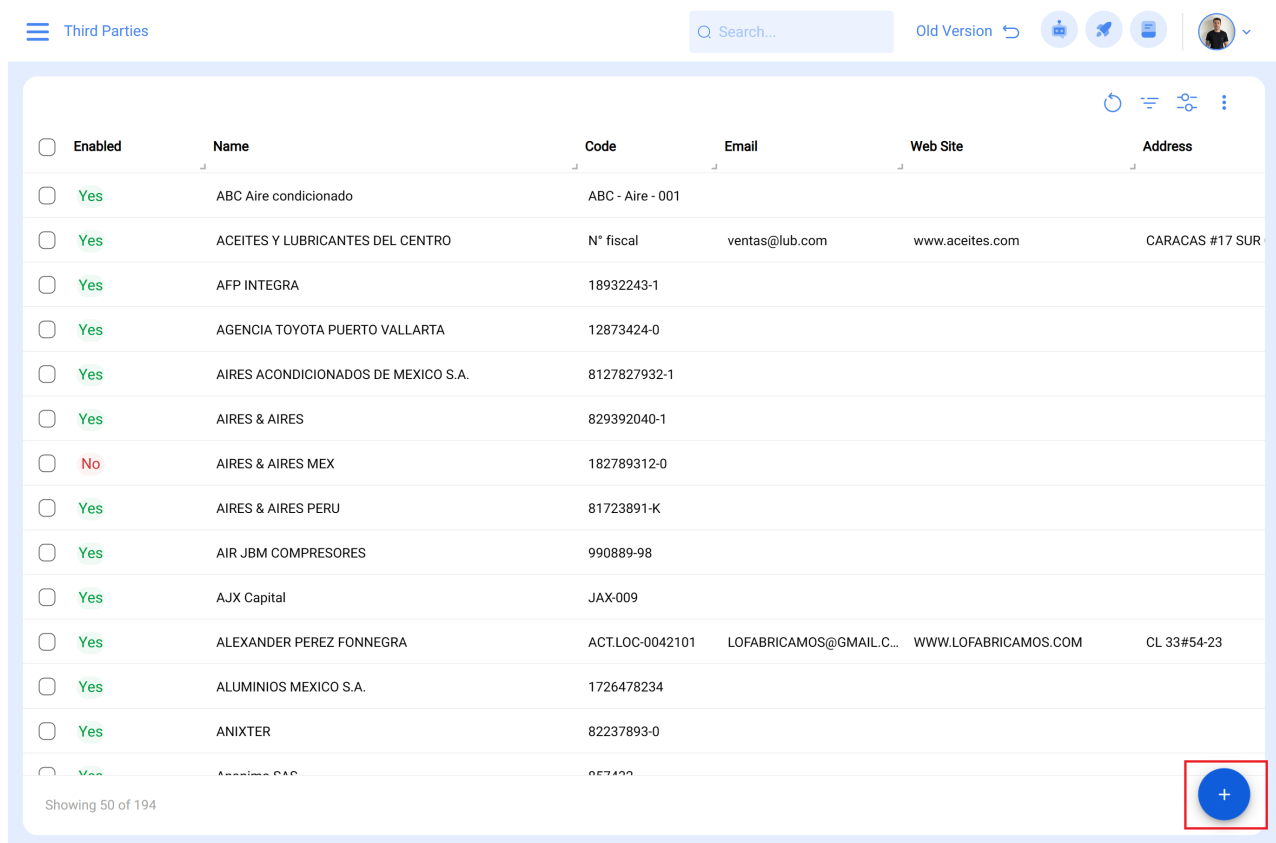
help.fractal.com/hc/en-us/articles/25073655489677-How-to-Add-Third-Parties

There are two ways to add third parties to the platform. The first option is to do it manually (one by one) using the add option, and the second option is to do it in bulk through imports using Excel files. (To add third parties in bulk, see the imports section.)

Manual add option:

To manually add a third-party Contractor, Supplier or Client to the platform, do the following:


1. Click the "Add" button located at the bottom right of the Third Parties window.



The screenshot shows the 'Third Parties' window in the Fractal platform. At the top, there is a search bar and a 'Third Parties' header. Below the header is a table with columns: Enabled, Name, Code, Email, Web Site, and Address. The table contains 14 rows of data, each representing a third party. The 'Enabled' column has checkboxes, some of which are green (Yes) and some are red (No). The 'Add' button, represented by a blue circle with a white plus sign, is located at the bottom right of the table and is highlighted with a red box.

Enabled	Name	Code	Email	Web Site	Address
<input type="checkbox"/>	ABC Aire acondicionado	ABC - Aire - 001			
<input type="checkbox"/>	ACEITES Y LUBRICANTES DEL CENTRO	N° fiscal	ventas@lub.com	www.aceites.com	CARACAS #17 SUR
<input type="checkbox"/>	AFP INTEGRA	18932243-1			
<input type="checkbox"/>	AGENCIA TOYOTA PUERTO VALLARTA	12873424-0			
<input type="checkbox"/>	AIRES ACONDICIONADOS DE MEXICO S.A.	8127827932-1			
<input type="checkbox"/>	AIRES & AIRES	829392040-1			
<input type="checkbox"/>	AIRES & AIRES MEX	182789312-0			
<input type="checkbox"/>	AIRES & AIRES PERU	81723891-K			
<input type="checkbox"/>	AIR JBM COMPRESORES	990889-98			
<input type="checkbox"/>	AJX Capital	JAX-009			
<input type="checkbox"/>	ALEXANDER PEREZ FONNEGRA	ACT.LOC-0042101	LOFABRICAMOS@GMAIL.C...	WWW.LOFABRICAMOS.COM	CL 33#54-23
<input type="checkbox"/>	ALUMINIOS MEXICO S.A.	1726478234			
<input type="checkbox"/>	ANIXTER	82237893-0			
<input type="checkbox"/>	ANIXTER	82237893-0			

2. The Third Parties module will open in a new window. In the "General" tab, complete the information applicable to the contractor or service provider you want to add to the system.

Third Parties Old Version 

Enabled ☒

Required Information

- Code can't be blank
- Name can't be blank

Details

- General
- Custom Form
- Branches
- Contacts
- Services
- Historical
- Attachments
- Document Management

Name Code

Type: ☒ Service Provider ☐ OEM ☐ Supplier ☐ Client ☐

Web Site Group 1 Group 2

Address

City

State

Country

Zip code

Latitude Longitude

-33,4263375 -70,6121675

Search on the map

Fractal | Software de mantenimiento | IoT | AI

Netsolutions Learning

Atalhos do teclado Dados cartográficos ©2024 2 m Termos Informar erro no mapa

Save

Note: the “Name” and “Code” fields cannot remain blank and must be completed in order to create and save your changes.

The required data is the following:

- **Names:** Name of the third party.
- **Code:** Fiscal identifier or identity card of the third party.
- **Type:** In Fractal there are four types of third parties (Service Provider, Manufacturer, Provider, Client), where a third party is allowed to cover more than one option.
- **Website:** Website of the contractor, service provider or third party.
- **Group 1 and Group 2:** Refers to free fields left by the platform to be completed as required.
- **City, Address, Department / State / Region, Country, Area Code:** Information related to the location of the third party.
- **Latitude, longitude:** Fields that are automatically added when utilizing the map search function.
- **Email:** Contractor, Service provider or third-party email
- Fax, SMS Telephone, Primary and Secondary Telephone numbers of the third party.

- **Conditions:** A catalog of conditions.
- **Visible to all:** Allows users to view the third-party information, regardless of the location of the platform access account.
- **Limit Access to This Location:** This refers to the site or location where the third party is located or linked to within the system. Only users with access to the linked site or location will be able to view or select said profile.

3. After completing the information relating to the General tab, click the “Save” button located at the top right part of the window. The third party will now be registered in the system.

The screenshot shows the 'Third Parties' form in a web application. The form is titled 'Third Parties' and has a 'Save' button in the top right corner. The form is divided into sections: 'Enabled' (toggle), 'Information' (with a message 'You have pending changes to save!'), 'Details' (with tabs for General, Custom Form, Branches, Contacts, Services, Historical, Attachments, and Document Management), and a main form area. The main form area contains fields for Name (ABC Aire acondicionado), Code (ABC - Aire - 001), Type (Service Provider, OEM, Supplier, Client), Web Site, Address, City, State, Country (EUA), Zip code, Latitude (-33,4263375), and Longitude (-70,6121675). There is also a map section with a search bar and a red pin marker.

When you do any type of editing, be sure to save the changes so they take effect.

Once you save the information, a series of options will be enabled on the left-hand side:

Custom Form: Here you can create different types of forms useful for characterizing personnel, whether third-party or human resources.

Branches: Here you can add the various geolocations of the third-party, as well as include email and phone numbers.

Contacts: Here you can add the responsible individuals for the activity or the third-party.

Services: Here you can add the name of the service or services provided, associate a price, a service unit, and the type of payment that can be made.

Histories: In this option, you can view the different assignments made with the third-party. For example, if the third-party has been assigned to a work order, it will be reflected in this space.

Attachments: Here you can attach a file, a link, or a note that you consider valuable to the record we are creating.

Document Management: In this space, you can relate documents related to the service that are subject to a date, such as a warranty.

Note: Auxiliary fields have a limit of 50 characters. Exceeding this limit may affect data import, causing errors or data truncation.