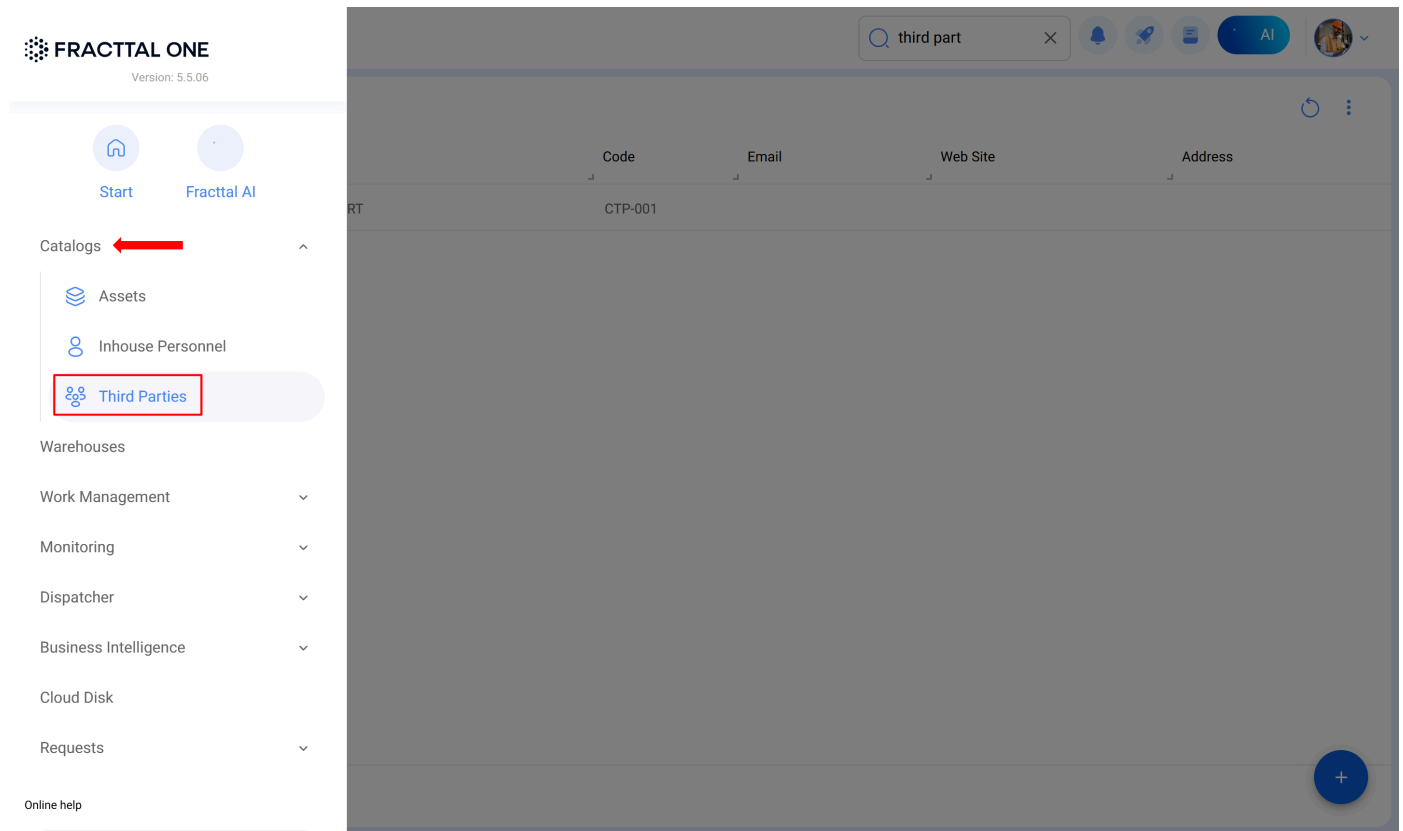


How to add a Third Party?

help.fracttal.com/hc/en-us/articles/25073655489677-How-to-add-a-Third-Party

There are two methods to add third parties to the platform. The first option is to do it manually, one by one, through the add function. The second option allows you to do it in bulk by importing using Excel files. (To add third parties in bulk, see the [imports](#) section)

To add a third party to the platform, simply click on the add icon located in the lower right corner of the platform.



Third Parties

Showing 1 of 1

| Enabled | Name | Code | Email | Web Site | Address |
|-------------------------------------|--------------------|---------|-------|----------|---------|
| <input checked="" type="checkbox"/> | COMPANY THIRD PART | CTP-001 | | | |

+

Then a new window will open belonging to the general tab, where you must complete the information corresponding to the third party you want to add to the system.

Third Parties

Save

Enabled

Required Information
 Code can't be blank
 Code is too short (the minimum is 2 characters)
 Name can't be blank
 Name is too short (the minimum is 3 characters)

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

Search on the map

Mapa Satélite

Global Jiu Jitsu Providencia

Itasca Chile SpA

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The required data are as follows:

- **Names:** Name of the third party.
- **Codes:** Tax identifier or ID number of the third party.
- **Type:** In Fracttal there are four types of third parties (Service Provider, Manufacturer, Supplier, Client), where a third party can cover more than one option.
- **Website:** Third party's website.
- **Classification 1 and 2:** These are free fields that the platform leaves to be completed as required.
- **City, Address, State / Province / Region, Country, Area Code:** Information corresponding to the location of the third party.
- **Latitude, Longitude:** These fields are automatically added when “Search on the map” is used for the address to which the third party belongs.
- **Email:** Email address of the human resource.
- **Fax, SMS Phone:** Phone numbers of the third party.
- **Conditions:** Conditions catalog.
- **Visible to all:** Allows the visualization of this third party to users, regardless of the location of the platform access account.
- **Limit Access to This Location:** Corresponds to the location where the third party is located within the system, taking into account the hierarchy this represents for the visualization of this profile in relation to other users.

After completing the information corresponding to the General tab, simply click the save button located at the top right of the window to record the third party in the system.

Third Parties

Enabled

Information
You have pending changes to save!

General

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

Name: THIRD PART Code: TP0016

Type: Service Provider OEM Supplier Client

Web Site: Group 1: Group 2:

Address: PAULISTA AVENUE

City: SP

State: SÃO PAULO

Country: BRAZIL

Zip code:

Map: Search on the map

Global Jiu Jitsu Providencia Itasca Chile SpA

Mapa Satélite

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Save

After making any type of edit, it is essential to make sure to save the changes for them to take effect. Once the information is saved, a series of options will be enabled on the left side:

- **Custom Form:** Here you can create different types of forms useful for characterizing personnel, whether third parties or human resources.
- **Branches:** Add the various geolocations of the third party, along with emails and phone numbers.
- **Contacts:** Allows adding those responsible for activities or the third party.
- **Services:** Allows adding service names, setting prices and service units, and specifying available payment types.
- **Histories:** Here the different assignments made with the third party are shown. For example, if the third party has been assigned to a work order, this information will be reflected here.
- **Attachments:** Allows attaching files, links, or notes that add value to the record being made.
- **Document Management:** Allows relating documents related to the service that are subject to dates, such as warranties.

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

