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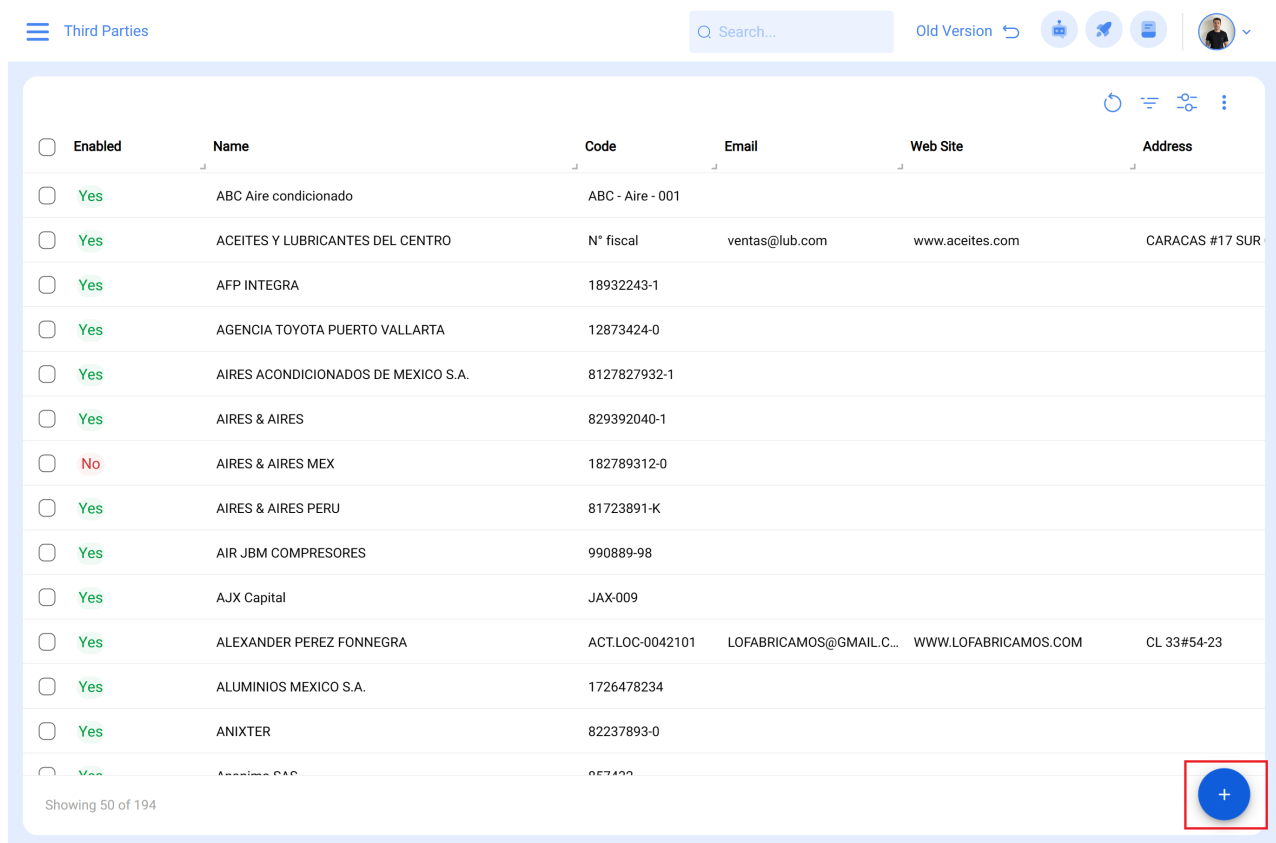
There are two ways to add third parties to the platform. The first option is to do it manually (one by one) using the add option, and the second option is to do it in bulk through imports using Excel files. (To add third parties in bulk, see the imports section.)

## 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.



**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.

**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 Fracttal 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:** Acatalog 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.



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.