

Supplier onboarding

How-to guide

Joining TechPassport for an NDA or POC

1 Create Your Account

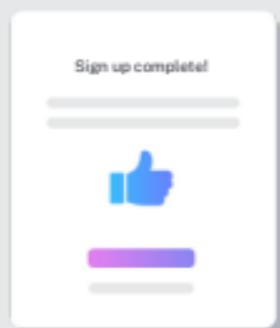
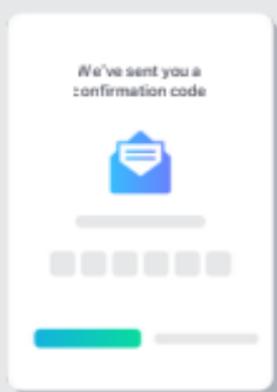
From the TechPassport website, select **Login / Register**, then **'Join us'**. Enter some basic details to sign up as a TechPassport supplier.



The link in your TechPassport invitation email will allow you to skip this step, taking you straight to the account creation page.

Once you've filled in some basic information, we will send you an authentication code via email to register your account.

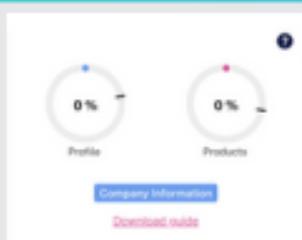
Use the code you receive to verify your account. If you can't find the email, remember to check your junk folder.



2 Onboarding

Dashboard

After creating your account, submit the mandatory company and product information which will allow an NDA or trial agreement to be released. To start click 'company information' from the dashboard.



To make your profile visible to clients and allow them to send NDA or POC requests, you must have submitted the mandatory company and product information.

The Enterprise Ready Questions section of the platform are **not** a requirement for an NDA or POC. However, buyers often ask for this section to be completed immediately following execution of a contract, so we recommend answering them as soon as you can.

Mandatory questions

To see only the mandatory questions required for onboarding in both the company and product sections, switch the 'show mandatory only' switch in the bottom-left of these pages to 'on'.

Show mandatory only

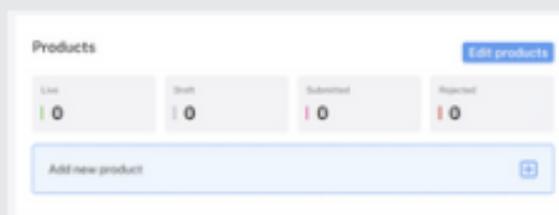
Products

Once you have completed the mandatory profile information, the products tab will become available. Start by setting up a new product and completing the necessary information.

You can save a product as 'draft' to return to it later, or 'submit' for TechPassport approval.

Again, you can use the 'mandatory questions only' switch to reduce the number of questions needed to complete this section.

You can invite new users as part of your company with different permissions levels, who will then receive an email with a personalised invite link to create their own user account.



3 What Happens Next?

After submitting your product, a member of the TechPassport team will accept or reject your submission within 1 working day. If you have been invited to the platform by a financial institution, they will be notified that your profile is live and ready for contract requests. An NDA may be released as soon as your product is approved.

TechPassport will provide you with email notifications when buyers have engaged with your profile, and contracts for you to review can be found in your **connections page** - which you can reach via the airplane icon on the left-hand side of the dashboard.



While waiting for a contract or reviewing one, we recommend completing the **Enterprise Ready Questions (ERQs)**. Created with 16 financial institutions, ERQs set the industry standard for FinTech readiness and help accelerate collaboration by showcasing your enterprise credentials.

Some details on your TechPassport profile, such as company name and address, are entered into the relevant sections of contracts sent in the platform. Please make sure any required changes to these sections are edited in your profile before signing.

If you are not the designated signatory for client contracts at your company, you can add them to TechPassport via the Teams page. Once they have registered their email and password, their name will be listed as the signatory once they move to sign any pending contracts.

Further information

Once you join TechPassport and agree to our Terms of Service, you will gain access to our full onboarding material, including a comprehensive guide to the ERQs and onboarding walk-through videos.

If you need any assistance, you can contact a member of our Supplier Success Team by using the built in help facilities in the platform.