TECHPASSPORT

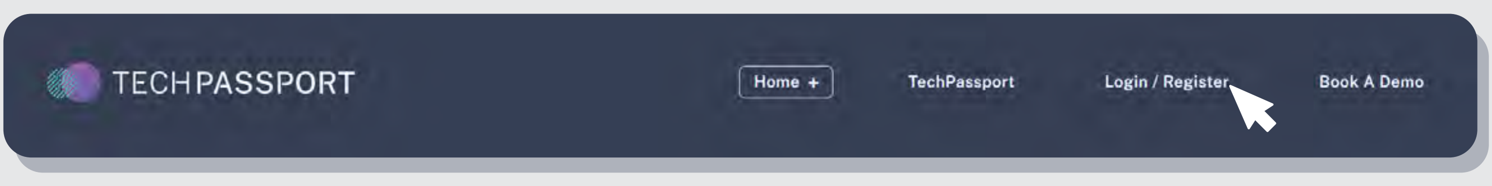
Supplier onboarding

How-to guide

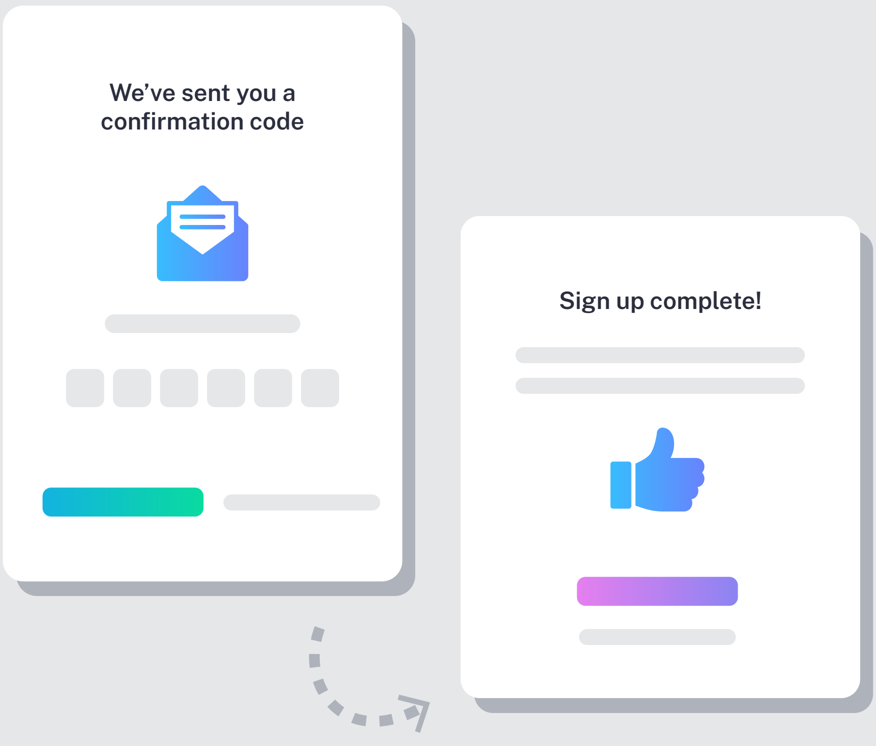
1 Joining TechPassport

From the TechPassport website, select Login / Register, then 'Join us'. Enter some basic details to create your account.

Make sure you read and agree to our Terms of Service. You can also download a copy directly from the create account screen.



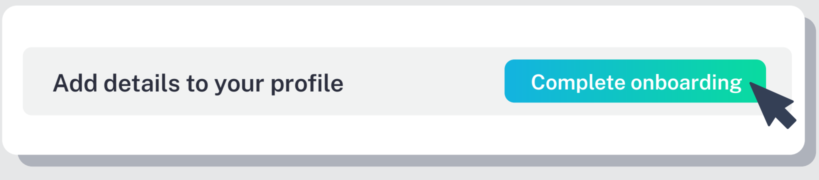
Once you've filled in some basic information, we will send you an authentication code via email to register your account.
Use the code you receive to verify your account. If you can't find the email, remember to check your junk folder.

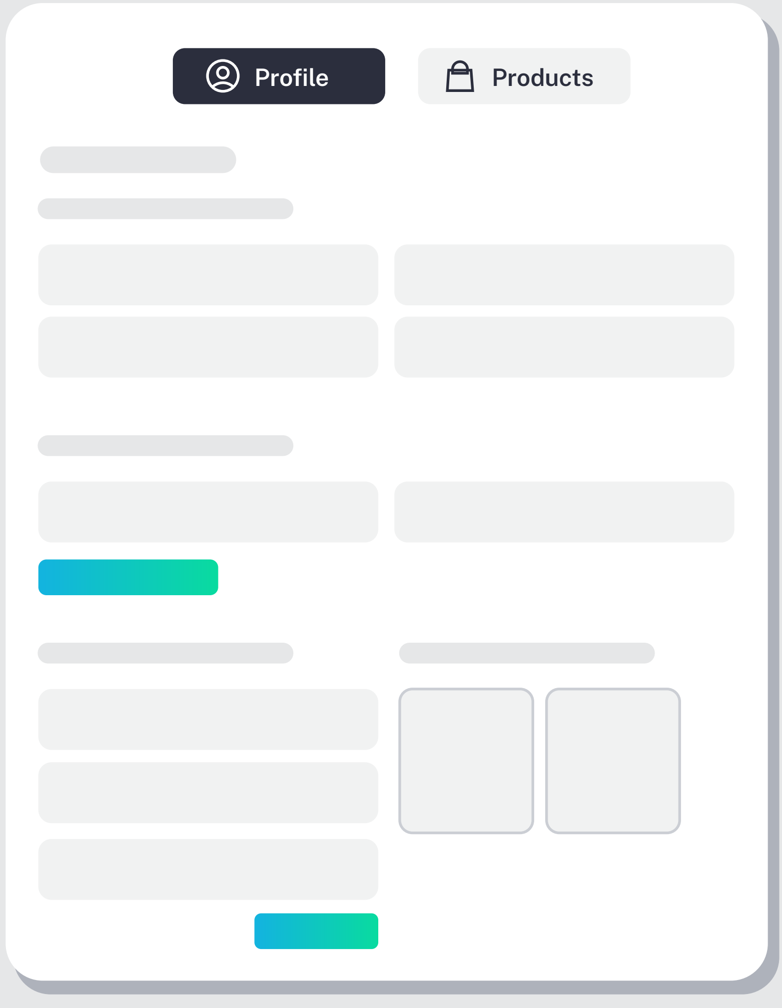


2 Onboarding

Dashboard

Once you log in, you will be directed to the dashboard. From here, you can click 'complete profile' to continue with onboarding, or access the onboarding questions from clicking your name in the top right and selecting 'edit profile'.





Profile

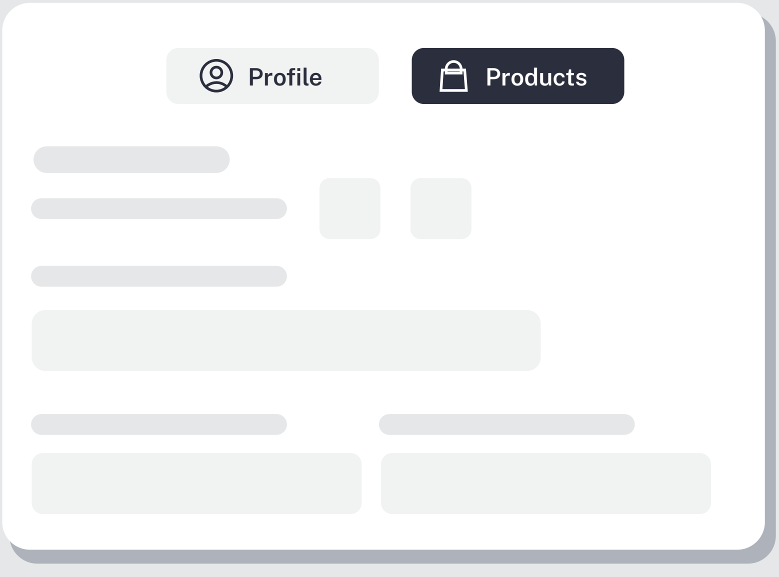
Complete the required 'personal' and 'company' information.
You can invite new users as part of your company with different permissions levels, who will then receive an email with a personalised invite link to create their own user account.
This section includes questions related to the traction of your company within financial services, diversity, ESG and insurance.

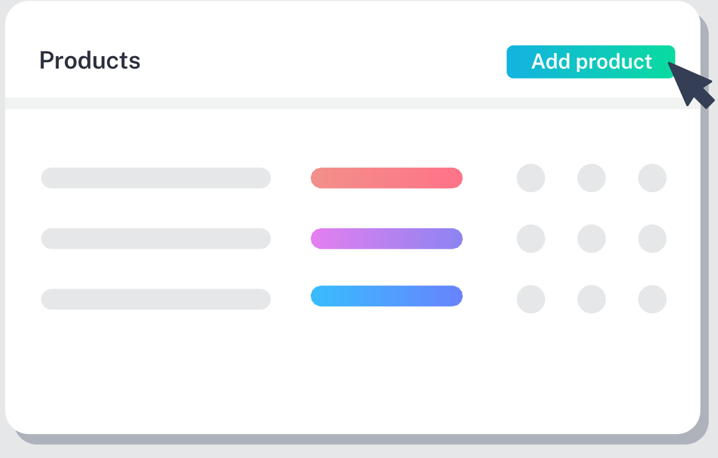
Mandatory questions

To see only the mandatory questions required for onboarding (which will then allow you to add products), switch the 'show mandatory only' toggle to 'on'.

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' for you to return to it later, or 'submit' for TechPassport approval.





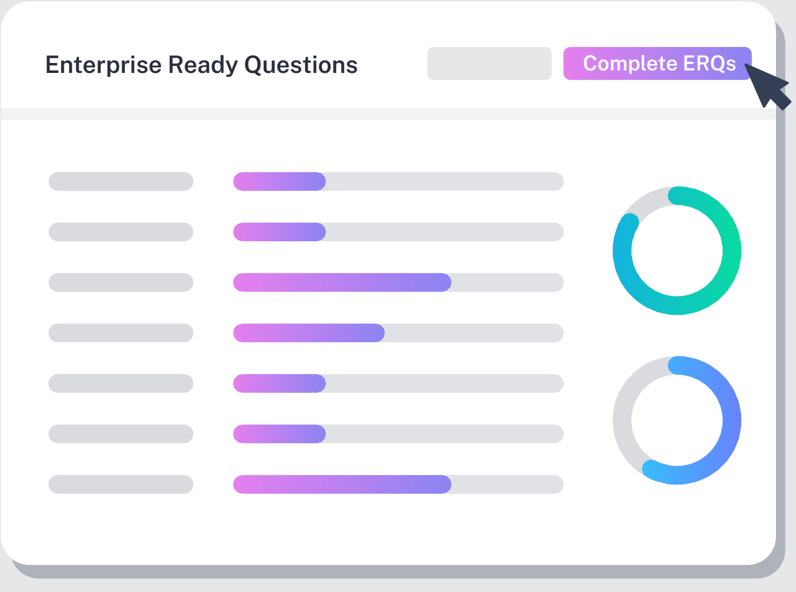
Dashboard widget

You can see all of your company products in the widget on the dashboard including the statuses.
Products can be edited and deleted using the dashboard widget, and you can quickly set up a new product using the button here.

3 Enterprise Ready Questions

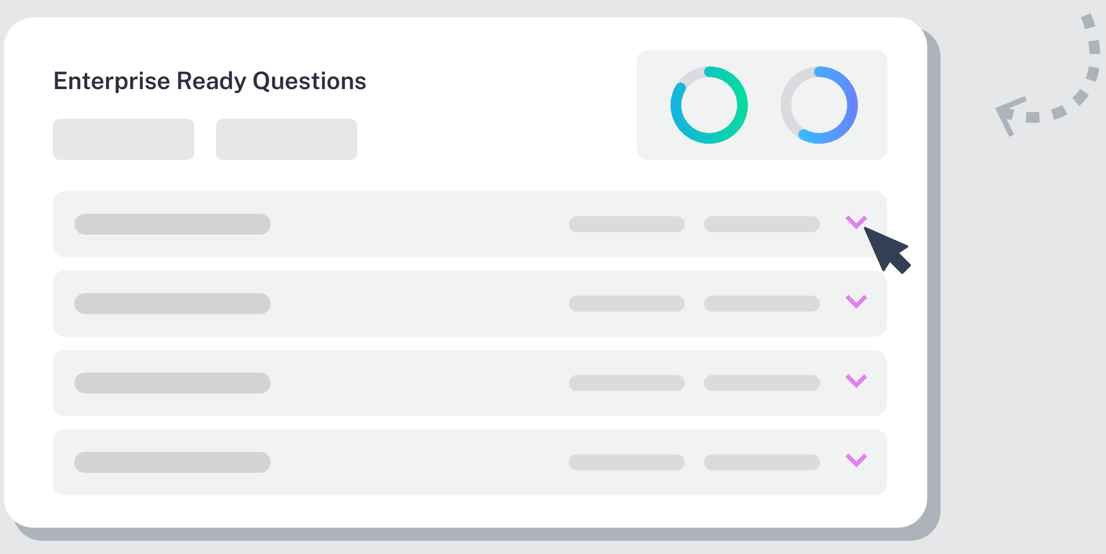
What are Enterprise Ready Questions?

The **Enterprise Ready Questions (ERQs)** on the TechPassport platform have been created in collaboration with 16 FIs. These questions set an industry standard of the "must haves" for Fintechs to work with FIs and can be used to efficiently assess the enterprise readiness and accelerate collaboration.



Access to the ERQs

You can view the ERQ completed and compliant percentages in the dashboard widget. When you first join TechPassport, these percentages will be zero, so click the 'complete ERQs' button to go to the ERQ questionnaire and complete the relevant sections to increase your scores.



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.