



Process Unity Supplier Guide

Supplier onboarding and how to answer the Due Diligence Questionnaire (DDQ)

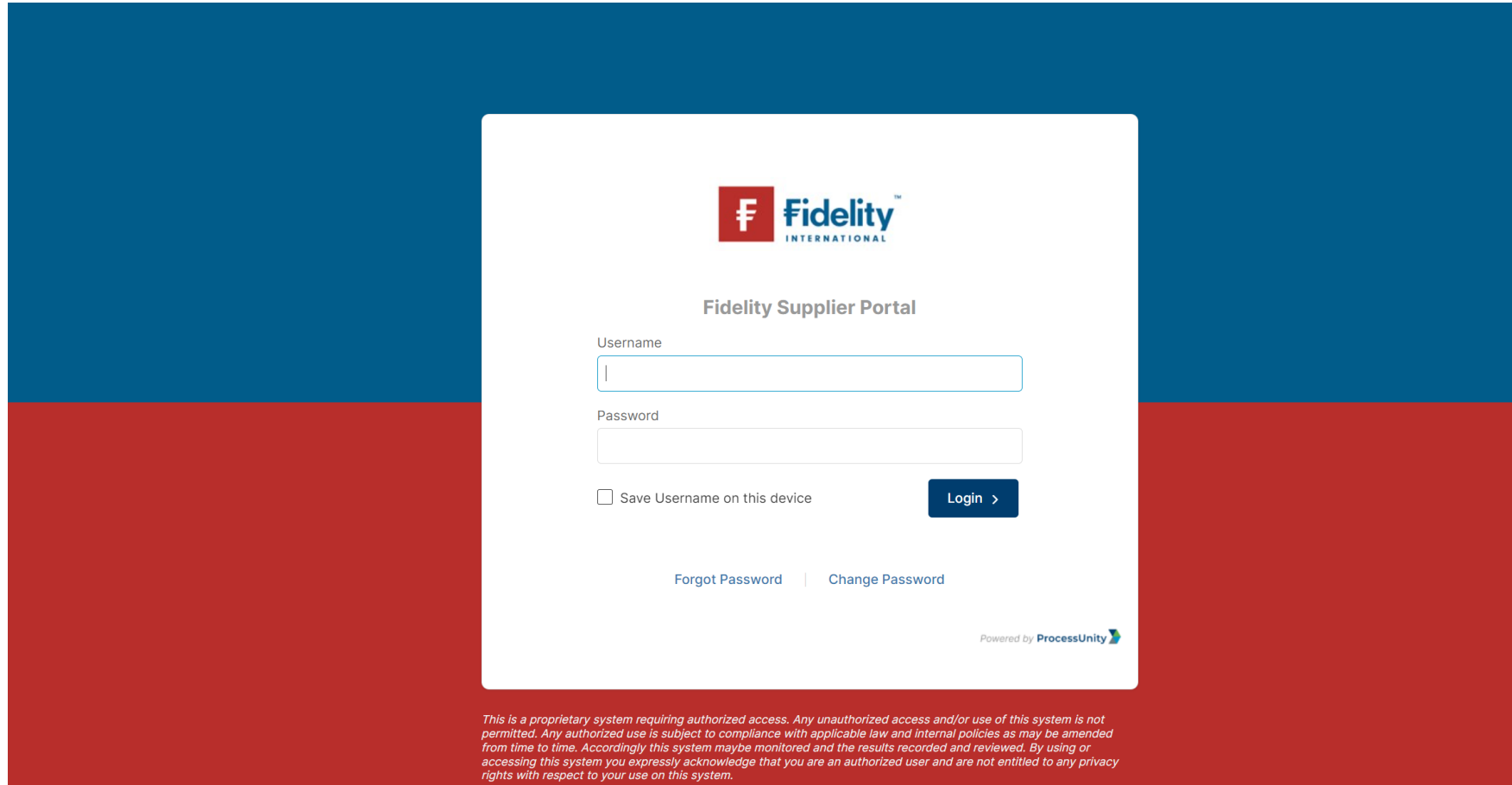
February 24

Logging into Fidelity's Supplier Portal

Log into the Supplier Portal using the account name and password that was provided in 2 separate emails.

On first log in you will be asked to change your password.

Log into supplier portal again using your new password



Fidelity Supplier Portal: Workspace

General Navigation:

The screenshot displays the Fidelity Supplier Portal interface. On the left, a navigation bar (labeled 1) contains the following menu items: Home, Active Questionnaire, Contacts, Assessment Workspace, 001. All Assessments, and 002. Address and Banking de... (highlighted). The main content area (labeled 2) shows the '002. Address and Banking details' workspace for 'Site - Yummy Chocolate'. It includes a table with one row: '01. Submitted to Third-Party' for 'Site - Yummy Chocolate' with 'Yummy Chocolate' as the service. Below the table, there are sections for 'Instructions for completion', 'Key Details' (Legal Business Name: Yummy Chocolate, Status: 01. Submitted to Third-Party, State: Inactive), 'Address Information', 'Banking Details' (with error messages: 'Please select your Bank' and 'Please select your Bank Branch'), and 'Bank Account Details'.

1 Navigation Bar

Active Questionnaires - This will list all active Due Diligence Questionnaires (DDQ) that are still to be completed. [How to Respond to Questions in the Due Diligence Questionnaires \(DDQ\)](#)

Contacts - If there are colleagues in your organisation that you feel would be better to answer some of the questions then this is where you can add their details to [delegate](#)

All Assessments - This will list out all assessments, whether they have been completed or not.

Address and Banking Details – These are the details that Fidelity would need to onboard your organisation to our payments platform and pay any invoices.

2 Workspace

The Workspace – is where either the questionnaires appear or Address and payment fields appear. This can be maximised by dragging the vertical line to the left

How to Respond to Questions in the Due Diligence Questionnaires (DDQ)

- 1 Click the section name to go into each section and respond questions
- 2 You can use the Next button to move to next section and answer questions
- 3 You can use the “Summary” button back to the home page and check questionnaire completion progress.
- 4 All the questions must be answered before it can be submitted. You can use the submit button on top to submit the questionnaire.

The screenshot shows the Fidelity Supplier Portal interface for a DDQ Assessment. The page title is "Supplier ABC Demo - DDQ Assessment - Nov 2023". The left sidebar contains navigation options: Home, Active Questionnaire, Contacts, and Assessment Workspace. The main content area includes a "Questionnaire Summary" section with a "Submit" button (callout 4), a "Reference Materials" section with a document icon, and a table of sections and completion progress (callout 1). The table has columns for "Section", "Questions Answered / Total", and "Percent Complete". The "Next" button (callout 2) is located at the bottom right, and the "Summary" button (callout 3) is at the bottom left.

Section	Questions Answered / Total	Percent Complete
Anti-Bribery & Corruption	0 / 22	0 %
BCM	0 / 10	0 %
Health and Safety	0 / 7	0 %
Operational Resilience	0 / 6	0 %
Subcontractor Management	0 / 1	0 %
Supply Chain Management	0 / 9	0 %
Supplier Code of Conduct	0 / 1	0 %
Confirmation	0 / 1	0 %
Total	0 / 57	0 %

How to Delegate Questions to Someone for Help (Step 1)

- 1 Before delegate a question or a section to someone for help, you need to ensure his contact is created and activated in Process Unity. You can go to "Contacts" on the left side menu to create contact for him.
- 2 Click "Create New Contact" in the pop-up page.
- 3 Please ensure the name and email address is provided for the new contact. And then you can save the contact information.
- 5 Then click "Activate" to make the new contact active.
- 6 Please remember to send password to the new contact point that he can log into the portal and respond questions.

Fidelity Supplier Portal

Supplier ABC Demo - DDQ Assessment - Nov 2023

Related Contacts

Name	State	Email
Linda Duan	Active	linda_duanlinlin@126.com

Linda Test

First Name: Linda, Last Name: Test

Full Name: Linda Test

Contact Info

Title: Anti-Bribery and Corruption Officer, Phone Number: [Not Set]

Email Address: linda_duanlinlin@test.com, Username: linda_duanlinlin@test.com

Linda Test

Deactivate Terminate **Send password** Edit

First Name: Linda, Last Name: Test

Linda Test

First Name: Linda, Last Name: Test

Contact Info

Title: Anti-Bribery and Corruption Officer, Phone Number: [Not Set]

Email Address: linda_duanlinlin@test.com, Username: linda_duanlinlin@test.com

Activate Terminate Edit

How to Delegate Questions to Someone for Help (Step 2)

- 1 Click the "Delegation" Button on the page of Active Questionnaire
- 2 Select the sections that you want to delegate to others
- 3 Select the person that you want to delegate to. The new contact you created in last step should now be available in the dropdown list if I's activated.
- 4 Then click "OK" to confirm your delegation. A pop-up will notice you the delegation is completed.
- 5 After delegation completed, you can check the bottom right corner to understand the questions being delegated or not delegated.
- 6 The delegated person can only answer questions with them but cannot submit questionnaire. It must be the primary contact (the initial owner) submit the questionnaire

Fidelity Supplier Portal

Supplier ABC Demo - DDQ Assessment - Nov 2023

Print Import Export Delegation Submit

Questionnaire Summary

Reference Materials

XXXXXXXXXXXXX.docx

Section	Questions Answered / Total	Percent Complete
Anti-Bribery & Corruption	0 / 22	0%
BCM	0 / 10	0%
Health and Safety	0 / 7	0%
Operational Resilience	0 / 6	0%
Subcontractor Management	0 / 1	0%
Supply Chain Management	0 / 9	0%
Supplier Code of Conduct	0 / 1	0%
Confirmation	0 / 1	0%
Total	0 / 57	0%

Summary Documentation Prev Summary Next

All Questions
Linda Test
Undelegated Questions

Section Delegation

Select Section(s) to Delegate *

Anti-Bribery...

Select Person to Delegate To

Linda Test

Skip Questions that have already been delegated

Cancel OK

Section Delegation

Delegation Complete.

23 questions were delegated.

OK

How to Submit Banking & Address Details (Step 1)

Fidelity Supplier Portal

PORTAL

Home

Active Questionnaire

Contacts

Assessment Workspace

01. All Assessments

002. Address and Banking de...

002. Address and Banking details

Prospect Third Party / Supplier - Prospect third party suppliers are provisional... View More

Status of Request	Name of Address and Banking Details	Service being provided
01. Submitted to Third-Party	Site - Yummy Chocolate	Yummy Chocolate

Site - Yummy Chocolate

Bank Details

Details Attachments Related Items

Instructions for completion

Kindly fill in as many details as possible,... View More

Key Details

Legal Business Name
Yummy Chocolate

Status
01. Submitted to Third-Party

State
Inactive

Address Information

Please confirm that the below billing address is correct, this is the address that will appear on the Invoice and the Purchase Order. If the address is... View More

Billing Address
Yummy Chocolate
Yummy Chocolate
Yummy Chocolate, Yummy Chocolate
123456789
Austria

Please confirm that the correct address which will be shown on an Invoice/Purchase Order is correct
[Not Set]

Banking Details

If the Bank name and/or the Bank Branch number is not available with in the drop down, Please select **Not Found** in each dropdown, additional... View More

The following banking information must be provided :

✘ Please select your Bank.
✘ Please select your Bank Branch.

Country Location of Bank Account
[Not Set]

Bank Name
[Not Set]

Bank Branch
[Not Set]

Banking setup required

Bank Account Details

Bank Account Number
[Not Set]

Beneficiary Name
[Not Set]

1 Address & Banking Details

Click on the Address & Banking menu item on the left hand navigation, you may need to expand the menu by clicking on the small + sign.

2 Access the Site details

A list of Address Sites will be listed if this has been previously submitted, the record will be in read-only mode, unless further information is required. Click on the site name to show the Site record.

3 Open up the record

Click on the Open Button to the start adding information.

How to submit Banking & Address Details (Step 2)

Fidelity Supplier Portal

002. Address and Banking details

Site - Yummy Chocolate

Bank Details

Details Attachments Related Items

Open

Open

This is the country that the organisation is located in:
Austria

Please select the country of bank that the organisation uses:

Austria

Cancel OK

The following banking information must be provided :

- ✘ Please select your Bank.
- ✘ Please select your Bank Branch.

Country Location of Bank Account
[Not Set]

Bank Name
[Not Set]

Bank Branch
[Not Set]

1 Country of Bank

Select using the dropdown the country that the Bank resides in, that your organisation uses, if the country does not appear please select “**Not Found**”

2 Click OK

Once Selected click OK

How to Submit Banking & Address Details (Step 3)

The screenshot shows the Fidelity Supplier Portal interface. The main content area displays the 'Bank Details' for 'Yummy Chocolate'. A modal dialog box titled 'Alert' is open in the center, containing a green checkmark icon and the text: 'Action Completed. You may now proceed with the data capture before returning to the Fidelity Team for review.' The 'OK' button in the dialog is highlighted with a red box and a red circle containing the number '1'. The background form is dimmed and includes sections for 'Key Details', 'Address Information', and 'Banking Details'. The 'Address Information' section shows the billing address for 'Yummy Chocolate' in Austria. The 'Banking Details' section includes fields for 'Country Location of Bank Account' (Austria), 'Bank Name' ([Not Set]), and 'Bank Branch' ([Not Set]).

1 Confirm

2 dialogue boxes confirming that the record is about to be opened and has been. Click **Confirm** on the first Dialogue box and **OK** on the second

How to Submit Banking & Address Details (Step 4)

Fidelity Supplier Portal

Site - Yummy Chocolate
Bank Details

Details Attachments Related Items

Instructions for completion

Kindly fill in as many details as possible,

- 1) Most fields have validation, and the inclusion of special characters such as !"#\$%&*()@-#|>< is not permissible.
- 2) For bank accounts selected from the available list, SWIFT Code / IFSC / Bank Code will get auto populated wherever applicable, when you hit 'Save'
- 3) Documents should be uploaded using the attachment tab. [View Less](#)

Key Details

Legal Business Name
Yummy Chocolate

Status
02. Opened By Third Party

State
Inactive

Address Information

Please confirm that the below billing address is correct, this is the address that will appear on the Invoice and the Purchase Order. If the address is... [View More](#)

Billing Address
Yummy Chocolate
Yummy Chocolate
Yummy Chocolate, Yummy Chocolate
123456789
Austria

Please confirm that the correct address which will be shown on an Invoice/Purchase Order is correct
[Not Set]

Banking Details

If the Bank name and/or the Bank Branch number is not available with in the drop down, Please select ****Not Found**** in each dropdown, additional textboxes will appear that will allow you to enter the correct Bank name and/or Branch number.

The following banking information must be provided :

- ✗ Please select your Bank.
- ✗ Please select your Bank Branch.

Country Location of Bank Account
Austria

1 Edit 4 Submit Back to Fidelity 3

1 Click on Edit
Click on the **Edit** Button to start editing the record

2 Complete Address & Banking
Answer all fields ensuring that all details are correct

3 Changing country
Click on the 3 lined menu if you need to change the country that the bank resides in.

4 Submit Back to Fidelity
Once all fields have been completed and appropriate documentation has been uploaded, Click the Submit Back to Fidelity

! IMPORTANT

Please ensure that all information is correct, any information that does not match may have to be returned which could delay the onboarding process.