

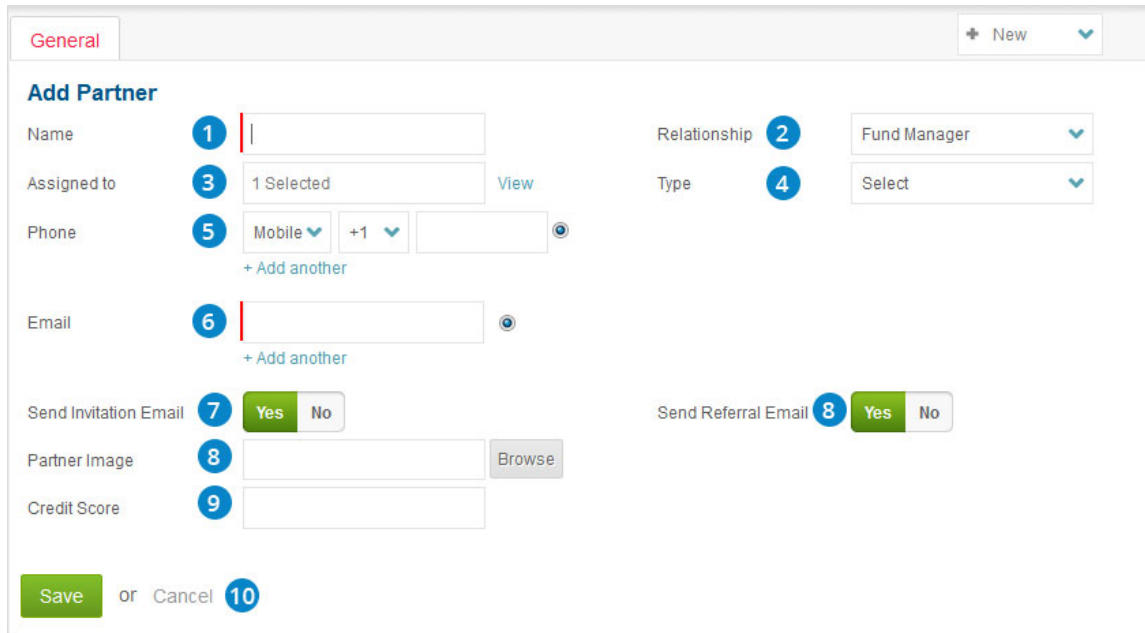


Add Partner

New partner can be added by clicking on  in the left panel or by clicking on  button in the upper right corner of the partner listing page. Detailed information of the partner can be added through two different sub tabs (general and tags) which have their own corresponding fields.



The screenshot shows the 'Add Partner' form with the following fields and callouts:

- 1**: Name input field
- 2**: Relationship dropdown menu (set to 'Fund Manager')
- 3**: Assigned to dropdown menu (set to '1 Selected')
- 4**: Type dropdown menu (set to 'Select')
- 5**: Phone input field with a dropdown for 'Mobile' and a '+1' dropdown
- 6**: Email input field
- 7**: Send Invitation Email toggle (set to 'Yes')
- 8**: Partner Image input field with a 'Browse' button
- 8**: Send Referral Email toggle (set to 'Yes')
- 9**: Credit Score input field
- 10**: Save or Cancel buttons

1 Type in the name of the partner (which is compulsory).

2 Choose the relationship from the drop down.



The close-up shows the 'Relationship' dropdown menu with the following options:

- Fund Manager (selected)
- Fund Manager
- Reseller
- Vendor

3 Choose Assigned type

4 Choose the type from the drop down.

Relationship	Fund Manager
Type	Select Select Company Person

5

Put in the phone number of the partner. You can add multiple phone numbers by clicking on [+ Add another](#) link.

6

Type in the e-mail address (which is compulsory).

7

Click on Yes if would like your partner to receive an 'invitation email'. Or else click on No.

8

Upload the partner image. Click on Yes if would like your partner to receive a 'referral email'. Or else click on No.

9

Type Credit Score

10

Click on [Save](#) to update the information and move to the next tab.