

Adding an Institutional Stakeholder

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To add an institutional stakeholder:

1. Access the Stakeholder page by clicking **Stakeholders** in the menu on the left.
2. Click **Add New Stakeholder**. The Add Stakeholder screen is displayed.
3. Select **Institution** in the **Stakeholder Type** dropdown.

The screenshot shows the 'Add Stakeholder' form. At the top, there's a header 'Add Stakeholder' with a close button. Below it, a tabbed interface shows 'Individual' and 'Institution' tabs, with 'Institution' selected. On the left, a sidebar contains 'Details', 'Address', 'Additional Fields', and 'Documents', with 'Details' highlighted. The main form area contains several input fields: 'Legal Name' (mandatory), 'Primary Contact First Name' (mandatory), 'Primary Contact Last Name' (mandatory), 'Primary Contact Email', and 'NRIC/PAN Number'. A 'Next' button is at the bottom right.

4. Under **Details**, enter the following details:

- a. Enter the **Legal Name**, **Primary Contact First Name**, and **Primary Contact Last Name** of the institution. These are mandatory fields.
- b. Enter the **Email** address, **NRIC**, and **PAN Number** of the primary contact.

5. Under **Address**, enter the **Address Line 1**, **Address Line 2**, and **Address Line 3**, **City**, **State**, **Country** and **Zip**.

6. Use **Additional Fields** to add any extra information from Stakeholder configurations.

7. You can upload any **Documents** relevant to the institutional stakeholder.

- a. To do this, click **Choose File**.
- b. Click **Save** to add the document.

8. Click **Save** to complete the process of adding an institutional stakeholder.