Link Financial Information to a CSO/Partner Profile (UN DATA Tab)

Overview: In this guide, you will be able to manually link a CSO/Partner profile with the financial system internal to your UN agency, to display the amount of cash transfers an organization has received. The partner's financial information will be visible to the partner as well as other UN agencies using the UN Partner Portal.

Please note you can only link financial information for a CSO/partner to your own agency's system.

Steps	Description	Action	Notes
1	Partners Page	On the left navigation bar, click on the *'Partners'* (1) icon to access the partners page	This will direct you to the *Partners* page. You can search for a specific partner using the filters on the page.
2	Partner	Click on the partner that you would like to link to your financial system.	You will be directed to the partner overview page
3	UN Data Page	Click on the *'UN Data'* (1) tab Click on the three vertical bullets (2) Click on the *'+Add Vendor/Partner ID'* icon	
4	Add Partner's vendor number/ partner ID	Enter the vendor number/partner ID (1) Select the implementing business area	The vendor number/partner ID must match with the number in your agency's financial system for the partner. The implementing business area should correlate with the partner's area of operations as registered in your organization's financial system with the organization UNHCR users can click on the UNHCR Partner Portal for more detailed information on financial transactions to specific partners.

Steps	Description	Action	Notes
1	Partners Page	On the left navigation bar, click on the *'Partners'* (1) icon to access the partners page	This will direct you to the *Partners* page. You can search for a specific partner using the filters on the page.
2	Partner	Click on the partner that you would like to link to your financial system.	You will be directed to the partner overview page

Steps	Description	Action	Notes
3	UN Data Page	Click on the *'UN Data'* (1) tab Click on the three vertical bullets (2) Click on the *'+Add Vendor/Partner ID'* icon	You can only link a partner to your own agency's financial system.

Steps	Description	Action	Notes
4	Add Partner's vendor number/ partner ID	Enter the vendor number/partner ID (1) Select the implementing business area	The vendor number/partner ID must match with the number in your agency's financial system for the partner. The implementing business area should correlate with the partner's area of operations as registered in your organization's financial system with the organization UNHCR users can click on the UNHCR Partner Portal for more detailed information on financial transactions to specific partners.

STEP 4