

Adding a Vendor

1. Click [Control Panel > Setup > Vendors](#).



2. In the Vendors section, click **New Vendor**. The Vendor Profile screen is displayed.



3. In the Vendor Information section, click the **Company Name** field and enter the company name.
4. Click the **Address 1** field and enter the company address. Click the **Address 2** field and continue entering the company address if more space is needed.
5. Click the **City** field and enter the city.
6. Click the **State/Province** field and enter the state or province.
7. Click the **Country** field and enter the country.
8. Click the **Zip/Postal Code** field and enter the Zip or postal code.
9. Click the **Main Phone** field and enter the main phone number.
10. Click the **Main Fax** field and enter the main fax number.

A screenshot of a 'VENDOR PROFILE' form. The 'Vendor Information' section is highlighted with a red rectangular box. It contains several fields: 'Active Vendor' (checked), 'Company Name' (A & M Elevator Company Inc.), 'Address 1' (8551 Georgetown Ln.), 'Address 2' (empty), 'City' (Red Bank), 'State/Province' (NJ), 'Country' (USA), 'Zip/Postal Code' (28658), 'Main Phone' (416-555-1234), 'Main Fax' (426-555-2984), and 'Language Preference' (English). The 'Company Name' field is the first field in the highlighted section.

11. If the vendor will receive dispatches for TR or PM, click the appropriate checkboxes in the **Settings and**

Permissions section.

12. Fill in the **Dispatch Devices** section for TR and/or PM.
13. Enter the **Name and Phone number** of the person who receives Work Orders.
14. Select the appropriate **Device type** and enter the e-mail address.
15. To send work orders to additional recipients, enter their address in the **CC:** field. (If there is more than one, separate each address with a semi-colon).

Settings and Permissions

☒ Available on TR Work Orders
☒ Available on PM Work Orders

Dispatch Devices

Tenant Request

Name: Phone:

Device:

Cc:

Preventive Maintenance

Name: Phone:

Device:

After Hours Contact

16. If there is an after-hours contact, enter their contact information in the **After Hours Contact** section.

Device:

After Hours Contact

Name: Phone:

Email:

17. In the Properties section, select the properties that the Vendor should be assigned to. Click the property name in the *Available Properties* list, then click ">" to move this property to the *Assigned Properties* list. To assign all properties to the Vendor, click ">>>".
18. To set a Default Property, which will be automatically displayed on the Home page and on the Tenant Requests and TR Work Orders screens when the vendor logs in, click the property name in the Assigned Properties list and move it over to the Default Vendor Property box using the directional arrows. Click **Set Default Vendor Property**.
19. Click **Save Vendor**.

Properties

Default Vendor Property One Corporate Tower - Sales

Available Properties

One Corporate Tower

Assigned Properties

One Corporate Tower - Sales

> > >
>
<

<<<

SET DEFAULT VENDOR PROPERTY

SAVE VENDOR

BACK TO LIST