





## Adding a Vendor

1. Click *Control Panel > Setup > Vendors*.

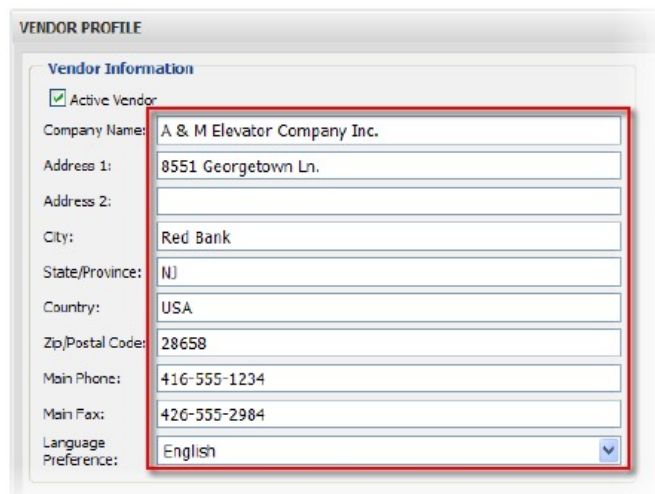


2. In the Vendors section, click **New Vendor**. The Vendor Profile screen is displayed.



VENDORS			New Vendor	Refresh
Company Name ^	Vendor Type	Active		
HVAC Company	HVAC	✓		
John's Landscaping	Landscaping	✓		

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.



**VENDOR PROFILE**

**Vendor Information**

Active Vendor

Company Name: A & M Elevator Company Inc.

Address 1: 8551 Georgetown Ln.

Address 2:

City: Red Bank

State/Province: NJ

Country: USA

Zip/Postal Code: 28658

Main Phone: 416-555-1234

Main Fax: 426-555-2984

Language Preference: English

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

**Permissions** section.

- Fill in the **Dispatch Devices** section for TR and/or PM.
- Enter the **Name and Phone number** of the person who receives Work Orders.
- Select the appropriate **Device type** and enter the e-mail address.
- 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**

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

Device:

**After Hours Contact**

Name:  Phone:

Email:

- 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 ">>>".
- 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**.
- Click **Save Vendor**.

**Properties**

**Default Vendor Property** One  
Corporate Tower - Sales

Available Properties

One Corporate Tower

Assigned Properties

One Corporate Tower - Sales

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