# Adding a Vendor

Adding a Vendor:

Note:

- When adding a vendor, it will not be available in the Certificates of Insurance (COI) module unless the Certificate of Insurance section has been filled in.
- For information on creating a vendor COI, see Adding a Vendor COI and associated topics.

1. Go to **Control Panel** > **Setup** > **Vendors**.

2. In the **Vendors** section, click on **New Vendor**. The **Vendor Profile** screen is now displayed.
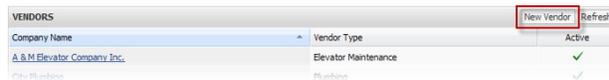
3. In the **Vendor Information** section, enter the following information in the fields provided:
   - Company name
   - Company address (using the **Address 1** and **Address 2** fields, as necessary)
   - City
   - State or Province
   - Country
   - Zip or Postal Code
   - Phone Number
   - Fax Number

4. If your company has additional languages enabled, use the **Language Preference** drop-down to select the preferred language of the vendor.

5. If the vendor will receive dispatches for TR or PM, click on the appropriate check-boxes in the **Settings and Permissions** section.

6. Fill in the **Dispatch Devices** section for TR and/or PM.

7. Enter the name and phone number of the person who receives work orders.

8. Select the appropriate **Device** type and enter the e-mail address, if applicable.

9. 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).

10. If the vendor is required to have a Certificate of Insurance (COI), select a vendor type and enter the contact information (contact name, email and phone number) for an individual who should be contacted about COI-related issues.

Note:

-   If the correct vendor type is not listed in the drop-down list, then an appropriate vendor type will need to be added. See Vendor Types for additional details.

---

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

12. In the **Properties** section, select the properties that the Vendor should be assigned to by clicking on the property name in the **Available Properties** list and then clicking on "**>**" to move this property to the **Assigned Properties** list. To assign all properties to the Vendor, click on "**> > >**".

13. To set a **Default Vendor Property**, which will be automatically displayed on the homepage and on the Tenant Requests and TR Work Orders screens when the vendor logs in, click on the property name in the **Assigned Properties** list and click on **Set Default Vendor Property**.

14. Click on **Save Vendor**.