

Adding a Vendor

[Control Panel > Setup > Vendors](#)

Adding a Vendor:

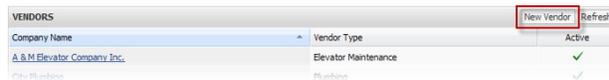
Note:

- 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.



State/Province:	NJ
Country:	USA
Zip/Postal Code:	28658
Main Phone:	416-555-1234
Main Fax:	426-555-2984
Language Preference:	English

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).

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](#)

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.

Preferences:

Certificate of Insurance (COI)

Vendor Type:

Contact Name:

Contact Email:

Phone:

[Properties](#)

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

Device: Email | jddougias@amelevator.com

After Hours Contact

Name: Robert Engels | Phone: 416-555-1253

Email: rengels@amelevator.com

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**.

Properties

Available Properties

One Corporate Tower - Sales

Assigned Properties

One Corporate Tower

Default Vendor Property One Corporate Tower

>>>
>
<
<<<

SET DEFAULT VENDOR PROPERTY

SAVE VENDOR | BACK TO LIST