



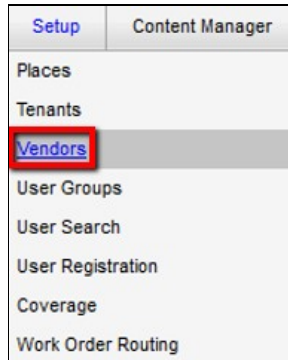


# Editing a Vendor

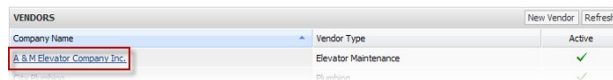
[Control Panel](#) > [Setup](#) > [Vendors](#)

## Editing a Vendor:

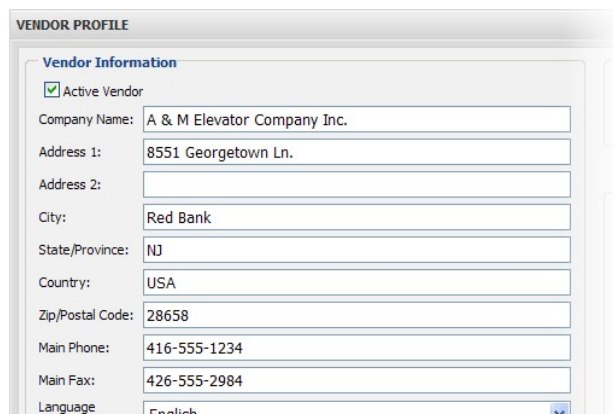
1. Go to **Control Panel > Setup > Vendors**.



2. In the **Vendors** section, click on the vendor name. The **Vendor Profile** screen is now displayed.



3. In the **Vendor Information** section, you can edit any of the following information:
  - 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, you can use the **Language Preference** drop-down to change the preferred language of the vendor.



Preference: [dropdown]

5. If the vendor will receive dispatches for TR or PM, check or uncheck the appropriate boxes in the **Settings and Permissions** section.
6. You can update the **Dispatch Devices** section for TR and/or PM.
7. You can edit the name and phone number of the person who receives work orders.
8. Select the appropriate **Device** type and (if necessary) enter the e-mail address.
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).

The screenshot shows two sections: 'Settings and Permissions' and 'Dispatch Devices'. The 'Settings and Permissions' section has two checked checkboxes: 'Available on TR Work Orders' and 'Available on PM Work Orders'. The 'Dispatch Devices' section is divided into 'Tenant Request' and 'Preventive Maintenance'. Both sections have a 'Name' field with 'William Douglas', a 'Phone' field with '416-555-1212', a 'Device' dropdown menu set to 'Email', and an email address field with 'bdouglas@amelevator.com'. There is also a 'Cc:' field which is currently empty.

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.

The screenshot shows the 'Certificate of Insurance (COI)' section. It includes a 'Vendor Type' dropdown menu set to 'Elevator Maintenance', a 'Contact Name' field with 'John Doe', a 'Contact Email' field with 'jon.doe@amelevator.com', and a 'Phone' field with '416-555-1212'. Below this section is a 'Properties' section which is currently empty.

11. If there is an after-hours contact, you can update the contact information in the **After Hours Contact** section.

The screenshot shows the 'After Hours Contact' section. It includes a 'Name' field with 'Robert Engels' and a 'Phone' field with '416-555-1253'. Above this section, a 'Device' dropdown menu is set to 'Email' and an email address field contains 'bdouglas@amelevator.com'.

- In the **Properties** section, you can update the properties that the Vendor should be assigned to. Click on the property name in the **Available Properties** list, then click on ">" to move this property to the **Assigned Properties** list, or "<" to remove an assigned property. To assign all properties to the Vendor, click on ">>>". To unassign all properties, click on "<<<".
- 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**.
- Click on **Save Vendor**.

The screenshot displays a web interface titled "Properties". It is divided into two main sections: "Available Properties" and "Assigned Properties".

- Available Properties:** A list containing "One Corporate Tower - Sales".
- Assigned Properties:** A list containing "One Corporate Tower".

Between these two lists is a vertical column of five buttons: ">>>", ">", "<", "<<<", and "<<<". These buttons are used to move properties between the available and assigned lists.

Below the "Assigned Properties" list is a button labeled "SET DEFAULT VENDOR PROPERTY".

At the bottom of the interface are two buttons: "SAVE VENDOR" and "BACK TO LIST".

Red boxes in the original image highlight the movement buttons, the "SET DEFAULT VENDOR PROPERTY" button, and the "SAVE VENDOR" button.