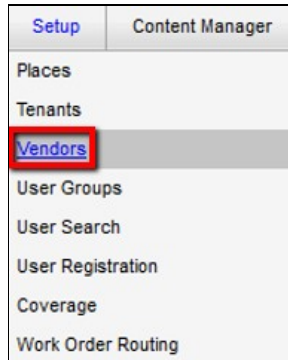


Editing a Vendor

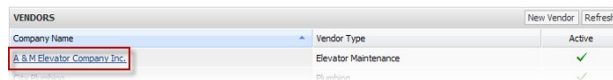
[Control Panel](#) > [Setup](#) > [Vendors](#)

Editing a Vendor:

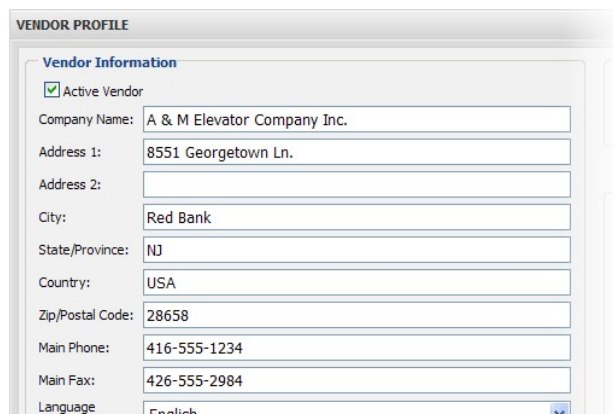
1. Go to **Control Panel > Setup > Vendors**.



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'. 'Settings and Permissions' has two checked checkboxes: 'Available on TR Work Orders' and 'Available on PM Work Orders'. 'Dispatch Devices' is divided into 'Tenant Request' and 'Preventive Maintenance'. Both sections have 'Name' (William Douglas) and 'Phone' (416-555-1212) fields. The 'Device' dropdown is set to 'Email', and the email address 'bdouglas@amelevator.com' is entered. A 'Cc:' field is empty. Below these is the 'After Hours Contact' section.

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'. Below it are text input fields for 'Contact Name' (John Doe), 'Contact Email' (jon.doe@amelevator.com), and 'Phone' (414-555-1212). A 'Properties' section is visible below.

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 has 'Name' (Robert Engels) and 'Phone' (416-555-1253) fields. Above it, a 'Device' dropdown is set to 'Email' with the email address 'bdouglas@amelevator.com' entered.

- 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 the 'Properties' management interface. It features two main sections: 'Available Properties' on the left and 'Assigned Properties' on the right. The 'Available Properties' list contains 'One Corporate Tower - Sales'. The 'Assigned Properties' list contains 'One Corporate Tower'. Above the 'Assigned Properties' list, the 'Default Vendor Property' is set to 'One Corporate Tower'. Between the two lists are five buttons: '>>>', '>', '<', '<<<', and 'SET DEFAULT VENDOR PROPERTY'. At the bottom of the interface, there are two buttons: 'SAVE VENDOR' and 'BACK TO LIST'. Red boxes highlight the '>>>', '>', '<', '<<<', 'SET DEFAULT VENDOR PROPERTY', and 'SAVE VENDOR' buttons.