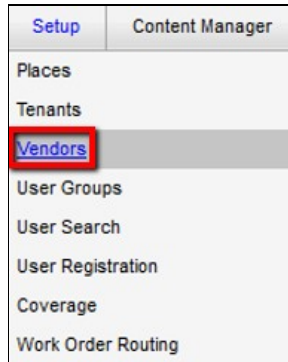


Editing a Vendor

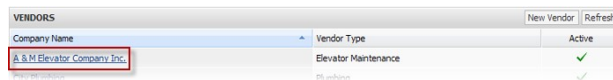
[Control Panel](#) > [Setup](#) > [Vendors](#)

Editing a Vendor:

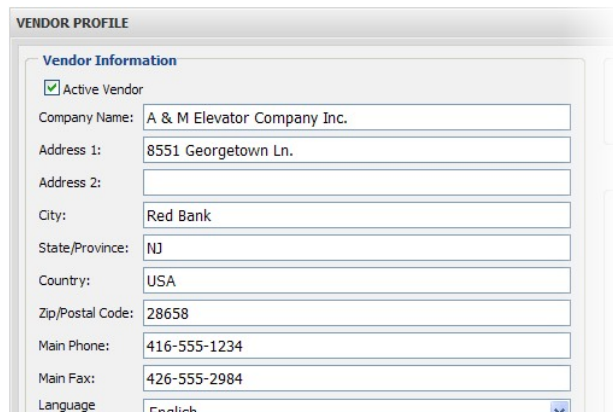
1. Go to **Control Panel** > **Setup** > **Vendors**.



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.

A screenshot of the 'VENDOR PROFILE' form. The form is titled 'Vendor Information' and contains several fields. The 'Active Vendor' checkbox is checked. The fields are: 'Company Name' (A & M Elevator Company Inc.), 'Address 1' (8551 Georgetown Ln.), 'Address 2' (empty), 'City' (Red Bank), 'State/Province' (NJ), 'Country' (USA), 'Zip/Postal Code' (28658), 'Main Phone' (416-555-1234), 'Main Fax' (426-555-2984), and 'Language' (English). The form is displayed in a light gray frame.

Preference:

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).

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, you can update the contact information in the **After Hours Contact** section.

Device:

After Hours Contact

Name: Phone:

Email: |rengels@amelevator.com

12. 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 "< < <".
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**.

The screenshot displays a web interface titled "Properties". It is divided into two main sections: "Available Properties" on the left and "Assigned Properties" on the right. The "Available Properties" list contains one item: "One Corporate Tower - Sales". The "Assigned Properties" list contains one item: "One Corporate Tower". Between these two lists is a vertical column of five buttons: "> > >", ">", "<", "< < <", and "<". A red box highlights these movement buttons. Below the "Assigned Properties" list, there is a button labeled "SET DEFAULT VENDOR PROPERTY", also highlighted with a red box. At the bottom of the interface, there are two buttons: "SAVE VENDOR" and "BACK TO LIST", with "SAVE VENDOR" highlighted by a red box. Above the "Assigned Properties" list, the text "Default Vendor Property One Corporate Tower" is visible.