

Add and Edit Vendors

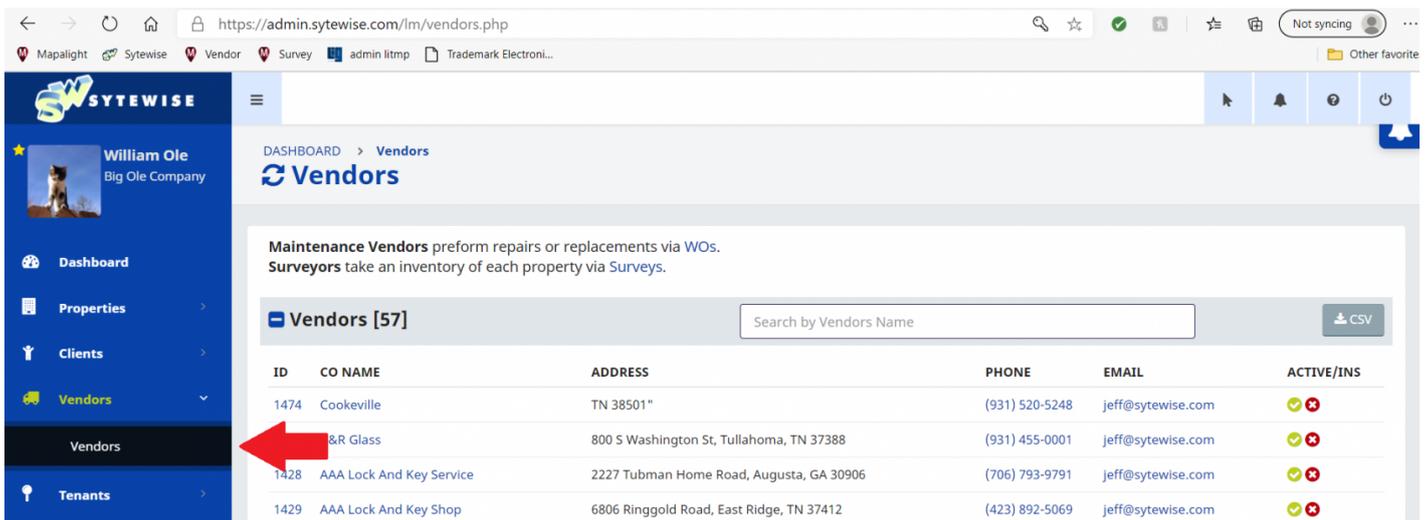
Vendors are the people that work for you on your properties. They can be employees, outside contractors, or even you or your co-workers if you have jobs that you do regularly, or want record of when they were completed.

Listing your vendors in the Vendor section does some great things for you.

- **Keep Track of Vendor Information everywhere, anytime**
- **Quickly Find the Preferred Vendor for any trade at any property**
- **Instant Access to Important information about your vendors including Insurance Documents and Contracts**
- **Store Contracts, Insurance, Proposals and any other form of work history documentation**

Keep Track of Vendor Information everywhere, anytime

Who was it that fixed that **HVAC** unit on the top of **Dollar General Store** last **April**? What is their phone number? Answers to all of those questions about how to get in touch with the vendors that work on your properties are at your fingertips, anywhere you need the information, anytime you want to look it up. You can look up vendors by Property, By Work Order.



The screenshot shows the Sytewise web application interface. The browser address bar displays <https://admin.sytewise.com/lm/vendors.php>. The page title is "Vendors" and the breadcrumb is "DASHBOARD > Vendors". Below the title, there is a section for "Maintenance Vendors" and "Surveyors". A table titled "Vendors [57]" is displayed with a search box and a "CSV" button. The table has the following columns: ID, CO NAME, ADDRESS, PHONE, EMAIL, and ACTIVE/INS. A red arrow points to the "Vendors" menu item in the left sidebar.

ID	CO NAME	ADDRESS	PHONE	EMAIL	ACTIVE/INS
1474	Cookeville	TN 38501"	(931) 520-5248	jeff@sytewise.com	✓✗
1428	&R Glass	800 S Washington St, Tullahoma, TN 37388	(931) 455-0001	jeff@sytewise.com	✓✗
1428	AAA Lock And Key Service	2227 Tubman Home Road, Augusta, GA 30906	(706) 793-9791	jeff@sytewise.com	✓✗
1429	AAA Lock And Key Shop	6806 Ringgold Road, East Ridge, TN 37412	(423) 892-5069	jeff@sytewise.com	✓✗

To open the **Vendor Page**, select **Vendors** in the menu and then click on **Vendors**. Once on the page you can type the vendor name in the search box and hit enter.

Or if you are on a **Work Order**, select the **Vendor Name**. Either of these methods will open the **Vendor's Profile Page**.

Work / Purchase Order #428
"221 Armstrong WO"

Enter a note and hit return

Print
 Create A Bill

Date:	Jul 18, 2019
Completed:	Jul 18, 2019
User:	William Ole
Contract:	221 Armstrong-Lights Contract
Fee:	\$ 123.00

Property
221 Armstrong
 221 Armstrong St
 Auburn
 AL 36830
 USA

From
Big Ole Company
 123 Main Street Nashville TN 37206
 (615) 555-1212
 artdudejoe@mac.com

To
Accurate Air 
 123 Main Street
 Nashville TN 37206
 (615) 319-0316
 artdudejoe@gmail.com
Account# ABC123

Client
Retail Location One
 1233 Sycamore St
 Nashville TN 37215
 (615) 555-4321
 artdudejoe@icloud.com

The vendor profile page includes a lot of details about the Vendor including address and contact information, any Contracts they have, Work Orders they have been assigned, or documents such as Insurance Certificates or copies of written contracts.

Accurate Air

123 Main Street
 Nashville TN 37206

artdudejoe@gmail.com
 (615) 319-0316
 User: William Ole

Created: Apr 01 2019 12:22 PM
 Modified: Sep 02 2019 01:21 PM

Edit

Notes

Enter a note and hit return

WO Pos CSV

NO	DATE	PROPERTY	SUBJECT	VENDOR	DUE/COMP	ACCNO	TOTAL
419	Apr 11, 2019	Homes on Beth WO	Homes on Beth WO	Accurate Air	Oct 28, 2020	123123	+ Bill
12485	Oct 11, 2019	Homes on Beth WO	Homes on Beth WO	Accurate Air	Oct 11, 2019		\$273.50 + Bill
428	Jul 18, 2019	221 Armstrong WO	221 Armstrong WO	Accurate Air	Jul 18, 2019	ABC123	\$123.00 + Bill
429	Jul 18, 2019	The 5 Spot WO	The 5 Spot WO	Accurate Air	Jul 18, 2019		\$250.00 + Bill
426	Jun 16, 2019	221 Armstrong WO	221 Armstrong WO	Accurate Air	Oct 28, 2020	ABC123	\$250.00 + Bill
416	Apr 9, 2019	Homes on Beth WO	Homes on Beth WO	Accurate Air	Mar 31, 2020		\$88.10 + Bill

Contracts CSV

ID	NAME	PROPERTY	CLIENT	VENDOR	BILLING	ENDS	LOA	STATUS
12	221 Armstrong-Lights Contract ACC#ABC123	221 Armstrong	Retail Location One	Accurate Air	🟢	Jun 16 2020	Aug 13 2019	Master Agreement
10	Homes on Beth-HVAC Maintenance contract	Homes on Beth	Retail Location One	Accurate Air	🟢	Apr 26 2020	-	Being negotiated
2	Homes on Beth-HVAC Contract	Homes on Beth	Retail Location One	Accurate Air	🟢	Jun 17 2019	-	Master Agreement

Contacts

Jeff Thornhill
 jeff@syteWISE.com
 (615) 319-8277

Add A Contact

bigolecompany

+

Lists of the Vendor's Work Orders and Contracts are to the right of their contact info.

Below the list of contracts you can add Insurance Documents and any other fields that you would like to keep on hand. File types include .Pdf docs, Excel, and Word documents.

The screenshot displays a software interface with several sections:

- Contacts:** Shows a contact for Jeff Thornhill (Jeff@sytewise.com, (615) 319-8277) and an 'Add A Contact' form with a 'bigolecompany' input field and a '+' button.
- Users:** A section for 'Users login and perform Services' with a 'venter' input field.
- New User:** A form for creating a new user with fields for 'Username' (bigolecompany) and 'Password' (masked with dots), and a 'Create User' button.
- Contracts:** A table with columns: ID, NAME, PROPERTY, CLIENT, VENDOR, BILLING, ENDS, LOA, STATUS.

ID	NAME	PROPERTY	CLIENT	VENDOR	BILLING	ENDS	LOA	STATUS
12	221 Armstrong-Lights Contract ACC#ABC123	221 Armstrong	Retail Location One	Accurate Air	✓	Jun 16 2020	Aug 13 2019	Master Agreement
10	Homes on Beth-HVAC Maintenance contract	Homes on Beth	Retail Location One	Accurate Air	✓	Apr 26 2020	-	Being negotiated
2	Homes on Beth-HVAC Contract	Homes on Beth	Retail Location One	Accurate Air	✓	Jun 17 2019	-	Master Agreement
- Files and Insurance:** A section for adding files and insurance policies. It includes a 'File Description' field (Final Agreement Doc), a file upload area with a 'FinalizedSoftwareAgreement.pdf' file, and an insurance policy section for 'ABC Insurance Company' with policy details and a 'CertificateofInsuranceDoc.pdf' file. A blue button 'Add A File OR Policy' is at the bottom.

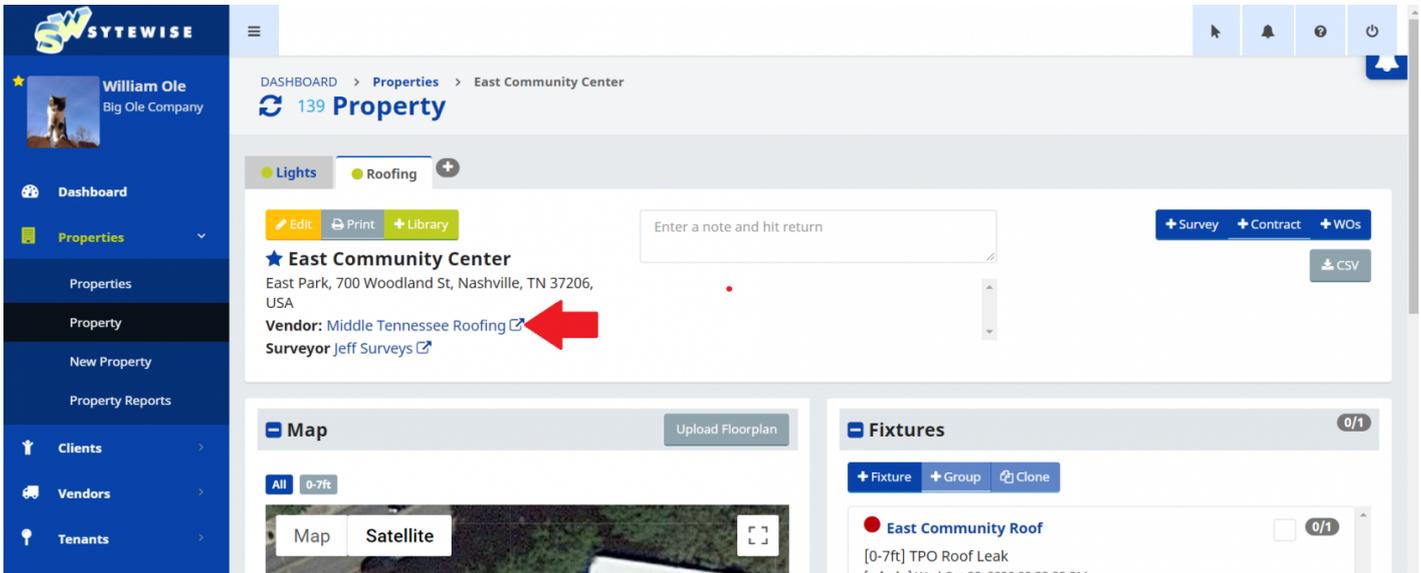
To add a document, just select the Add a File or Policy button, select the file you wish to add and upload.

Most People want to keep a **Certificate of Insurance** (COI) for vendors that work on their properties. To add an Insurance Policy document of any kind, Select the **Add a File or Policy** Button, then Select the **Insurance Policy Tab**. Enter the information about the Insurance Policy and click on **Save**. After the policy info is entered and saved you will see the Insurance Policy listed with a button that says **Choose File**. Select the file for your Insurance Policy and click Save. Your policy information will be listed with a link to the actual Insurance File.

To edit the information about the document, select the pencil next to the file link. All of the information about the document or insurance policy can be edited, or the file can be deleted.

Quickly Find the Preferred Vendor for any trade at any property

You can track down vendors for a specific property by Trade and by Work Orders. Just Go to the Property Page, Select the **Trade Tab** at the top of the window for the type of work your **Vendor** does. Then look at the Preferred Vendor for that trade. You can list your **Preferred Vendor** and up to six alternate vendors you use for that same type of work.



Scroll down to the bottom of the Property page. There is a list of Work Orders performed on that Property under that Trade Tab. All of the Vendors for your Work Orders are listed next to the description of each one. It's easy to track down which Vendor did the work on each Work Order.

Work / Purchase Orders								CSV
NO	DATE	PROPERTY	SUBJECT	VENDORS	DUE/COMP	ACCNO	TOTAL	
423	Jun 4, 2019	East Community Center WO	East Community Center WO	Middle Tennessee Roofing	Jun 18, 2019 498		\$800.00 + Bill	
421	May 13, 2019	East Community Center WO	East Community Center WO	Middle Tennessee Roofing	May 20, 2019 527		\$800.00 + Bill	
425	Jun 6, 2019	East Community Center WO	East Community Center WO	Middle Tennessee Roofing	Jun 6, 2019		\$800.00 + Bill	

Instant Access to Important information about your vendors including Insurance Documents and Contracts

Sytewise has the ability to store specific contract terms for any Vendor contracts. If you have agreed upon terms for your landscaping throughout the year, or a fixed price per lamp on your pole light maintenance you can keep them with you at all times and never wonder if the contractor completed everything agreed upon.

- What is my per bag price for Ice Melt with my vendor for the Madison County Service Center? Any contract information can be listed and available from anywhere. Your staff can check the terms of contracts while they are on properties and communicate with vendors about work accomplished without having to run back to the office.

Sytewise keeps track of which vendors you use on each of your properties for certain types of work. Take HVAC services, for instance. If you have a company that you use on any of your properties to maintain your HVAC equipment, assign them as the default vendor for HVAC for that property. That way every work order you create for HVAC on that property will autofill the name and information of your preferred vendor. You don't have to worry about looking up all that data, and anyone else who needs to complete a Work Order will know who you like to use to work on the HVAC equipment at that location.

Any **Contract** listed on a Property includes the name of the **Vendor** that is a party to the contract. It also includes the **Property** and **Client** contacts. Selecting the Vendor name will take you to the **Vendor Profile Page**.

The screenshot displays the Sytewise software interface. On the left is a blue sidebar with navigation options: Clients, Vendors, Tenants, Users, WOs, Surveys, Contracts, Bills, Library, and Fixtures. The main content area is titled 'Surveyor Joe's Surveys' and shows a '1 Contract' section. A contract entry is visible: '16 The 5 Spot Roofing Contract' with a status of 'Being negotiated'. The contract details include the dates 'Aug 15, 2019 to Aug 30, 2023', a 'LOA: Oct 01, 2020', 'Client: Retail Location One', 'Vendor: Middle Tennessee Roofing', and a 'Flatrate: \$ 150.00'. A 'Create A Bill' button is present. Below the contract is a 'Map' section with an 'Upload Floorplan' button and a 'Fixtures' section with '+ Fixture', '+ Group', and 'Clone' buttons. The fixtures section includes the text 'Add your first fixture to this property'.

Revision #7

Created Fri, Jan 31, 2020 11:55 PM by Joe Smith

Updated Fri, Apr 2, 2021 12:47 AM by Joe Smith