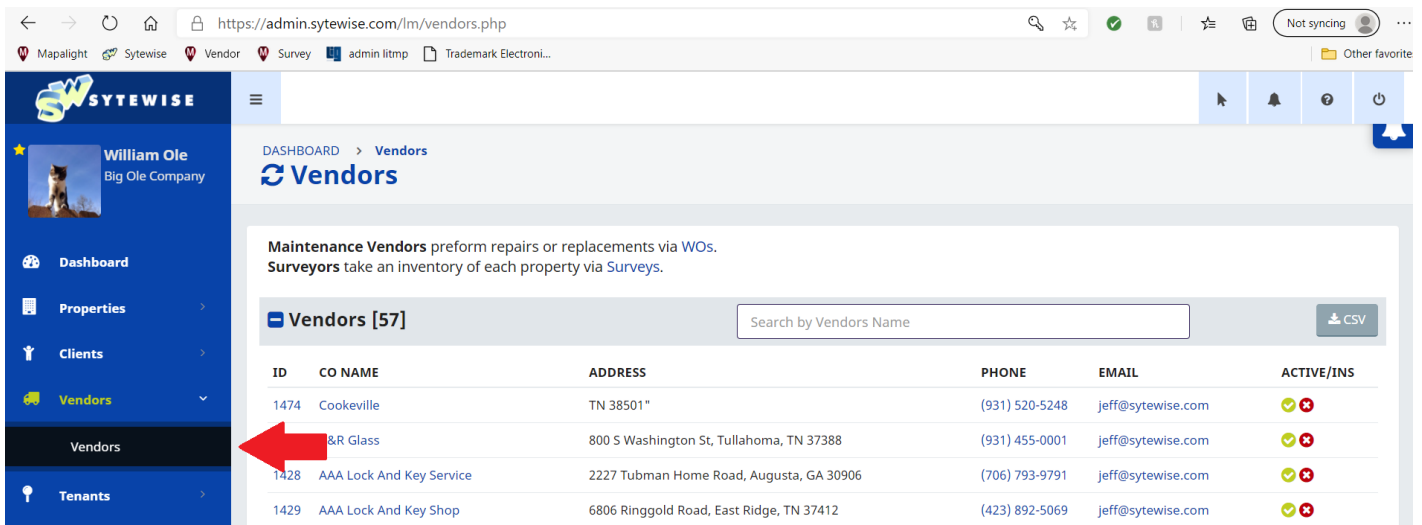


Creating a Vendor

Vendors are the people who work on your properties — outside contractors, service companies, or even employees whose work you want to schedule and document. Before you can create a property or issue a work order, at least one vendor must exist in the system.

To create a new vendor:

1. Go to **Vendors** in the left navigation menu and select **Vendors**.



The screenshot shows the Sytewise Vendors management interface. The left navigation menu is expanded, and the 'Vendors' option is highlighted with a red arrow. The main content area displays a table of vendors with the following data:

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	✓✗

1. Expand the **Create A New Vendor** section at the top of the page.

Create A New Vendor

Vendor Type	Login Username
<input type="text" value="Surveyor"/>	<input type="text" value="Unique Username"/>
Company Name	Password
<input type="text" value="Company Name"/>	<input type="text" value="Password"/>
Phone Number	Physical Address (Optional)
<input type="text" value="Phone including areacode"/>	<input type="text"/>
Company Email	Description (Optional)
<input type="text" value="email address"/>	<input type="text"/>
<input type="button" value="Create Vendor"/>	

1. Fill in the required fields:

- **Company Name** — must be unique in your account
- **Phone Number** — primary contact number
- **Company Email** — the main inbox for this vendor
- **Login Username** — the vendor's credential for the Vendor Portal
- **Password** — minimum 8 characters, one capital letter, and one number
- **Address** — the vendor's physical business address

2. Click **Lookup Geolocation** to validate the address. The Create Vendor button will not appear until this step is completed.

3. Click **Create Vendor**.

Once the vendor is created, you can add contacts, attach insurance certificates, and assign the vendor as the default for specific property trades.

Adding an Insurance Certificate (COI)

Most accounts keep a Certificate of Insurance on file for every vendor. To add one:

1. On the vendor's profile page, scroll to the files section and click **Add a File or Policy**.

Work Orders

No	Date	Property	Subject	Vendor	Due/Comp	Accno	Total
▶ 21885	May 6, 2026	TEST PROPERTY WO / Misc	TEST PROPERTY WO	Jeff Test Vendor	May 13, 2026 18		\$0.00
▶ 21952	May 16, 2026	TEST PROPERTY WO / Misc	Testing Multiple Recipients	Jeff Test Vendor	May 22, 2026 9		\$0.00
▶ 21953	May 17, 2026	TEST PROPERTY WO / Misc	Testing Multiple Recipients	Jeff Test Vendor	May 22, 2026 9		\$0.00
▶ 21956	May 18, 2026	TEST PROPERTY WO / Misc	Testing Multiple Recipients	Jeff Test Vendor	May 25, 2026 6		\$0.00
▶ 21958	May 18, 2026	TEST PROPERTY WO / Misc	Testing Multiple Recipients	Jeff Test Vendor	May 25, 2026 6		\$0.00

Contracts

ID	Name	Property	Client	Vendor	Billing	Ends	LOA	Status

Files Upload A File

Deactivate Jeff Test Vendor

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Upload [Close]

Choose what type of file to upload

Work Orders

No	Date	Property	Subject	Vendor	Due/Comp	Accno	Total
▶ 21885	May 6, 2026	TEST PROPERTY WO / Misc	TEST PROPERTY WO	Jeff Test Vendor	May 13, 2026 18		\$0.00
▶ 21952	May 16, 2026	TEST PROPERTY WO / Misc	Testing Multiple Recipients	Jeff Test Vendor	May 22, 2026 9		\$0.00
▶ 21953	May 17, 2026	TEST PROPERTY WO / Misc	Testing Multiple Recipients	Jeff Test Vendor	May 22, 2026 9		\$0.00
▶ 21956	May 18, 2026	TEST PROPERTY WO / Misc	Testing Multiple Recipients	Jeff Test Vendor	May 25, 2026 6		\$0.00
▶ 21958	May 18, 2026	TEST PROPERTY WO / Misc	Testing Multiple Recipients	Jeff Test Vendor	May 25, 2026 6		\$0.00

Contracts

ID	Name	Property	Client	Vendor	Billing	Ends	LOA	Status

1. Select the **Insurance Policy** tab.

1. Enter the policy details (carrier, policy number, effective and expiration dates) and click **Save**.
2. Once the record is saved, a **Choose File** button appears. Select your COI document and click **Save**.

Your policy information will be listed with a link to the uploaded file. To edit or delete a policy or document, click the **pencil icon** next to the file link.

Vendors can add insurance and location information to their profiles from the vendor portal! Add instructions on how to do this in your invitational email and vendors are more likely to make those entries on their own. Vendors can have multiple COI's in their profile to confirm certificates on multiple properties.

For a complete guide to organizing vendors, assigning them to property trades, setting default vendors, and managing contacts, see **[Setting Up Vendors in Sytewise](#)** →

Revision #5

Created Sun, May 31, 2026 10:46 PM by Jeff Thornhill

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