2. Vendor Portal Documentation

Help with the Sytewise Vendor Portal.

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Logging In

Helpful information for accessing your Vendor Portal Account

Log in Screen Help

Log in help for the Sytewise Vendor Portal

- Use your web browser to go to https://vendor.sytewise.com.
- Enter your user name and password credentials to access your profile.
  - If you don't know your vendor credentials, contact the company that sent you a work order.
- Agree with the terms and conditions and select Enter. Click Here for More Info on Work Orders.

SYTEWISE

Vendor Login

Username

Elemental Air

Password

••••••••••••••••

☐ Agree with the Terms & Conditions

Forgot Password?

LOGIN

Don't have a MapALight account? Signup Now

Work Order Help

How to access Sytewise Work Orders

Open Work Orders Page

Once you log in you will see the Open Work Orders page.

- Any Work Orders listed here have not been completed in the system.
- Each line in the list is an individual Work Order.
- You can see the Work Order Number in [Brackets] listed just before the location.
- Any Work Orders that you have **rejected** will also be listed in <mark>Yellow</mark>.
- The name of the location is listed along with the address.
- The date the of requested completion is listed in the blue bar just below the Work Order Number.
- Click on the arrow to the right to see the work order.

The Navigation bar at the bottom of the image below consists of the following

- The Home or Work Orders Page
- The Gear is your Vendor Portal Profile
- The arrow will allow you to log out.

For this example we are going to use the Work Order 12502 for the Ollies location in Toccoa Georgia. Once you locate the Work Order you are looking for, click the Right Arrow to see the full Work Order.

Click here to see a work order with explanation of all of the features.

Open Workorders

Welcome, Elemental Air

⚠ Rejected   Completed

[12501] 032 Cookeville TN 📍 560 S Jefferson Ave #4, Cookeville, TN 38501, USA →
`Dec 4, 2020 (5 Days from now)`

[12502] Toccoa Georgia Ollies 996 📍 1524 Big A Rd, Toccoa, GA 30577, USA →
`Dec 4, 2020 (5 Days from now)`

🏠   ⚙   ➡

Work Orders

Info you will find on a work order

- Work Order Number
- The Work Order Title
- The work location associated with this Work Order
- The Client Company Name, Address, and Phone Number
- Specific Notes and Instructions regarding this Work Order
- An active map with the GPS coordinates of the property and fixture
- A list of the fixtures that need service along with photographs and documents
- The ability to reject the Work Order
- Work Order Notes and Completion Button.

Here's what you will find at the top of the Work Order:

Workorder #12502

Welcome, Elemental Air

out this work order and touch or

ork order and moves it to your

Ollie's Toccoa Quarterly HVAC Service Units 1,2,7,8

Property: Toccoa Georgia Ollies 996
📍 1524 Big A Rd, Toccoa, GA 30577, USA

Management: Big Ole Company (615) 555-1212
123 Main Street Nashville TN 37206

> Please conduct the quarterly service on HVAC Units 1,2,7, and 8. Clean the coils, Change the filters, Inspect the heat exchangers, and adjust the belts. Estimate the cost before starting repairs. Call me with any questions. Jeff 615-319-8277.

to the work site, just click on the

Here's the Active Map or Drawing of the property:

Confirm completion of Workorder #12502 at *Toccoa Georgia Ollies 996.*

Enter notes here, then click all complete below.

[All Complete]

ton and can be hidden or

Map.

ixture

Below the Fixture map is a list of all of the fixtures that need service

OR: Check all items that are **NOT** complete [Hide Map]
and provide further information as to why.

SERVICE = part requires repair, **REPAIR** = part failed and was repaired.

➕ **Fixture: HVAC 2 (EMS 10) SN 5612E02457** 📍
2 part to repair *2012 Lennox 5 TON GAS PACK RTU*

Next to the Fixture Name is a small blue plus sign (+). Click this to reveal:

- Parts or services that this Fixture requires
- Thumbnail photographs or files related to this fixture
- indicators of which part requires repair

- There may be several parts listed in each fixture.
- Only those with the **Needs Service** button highlighted are meant serviced on this work order.
  - In the example above **HVAC UNIT 2** needs the **Quarterly Cleaning** done and the **Filters** changed.
  - On each of those lines you will notice that the **Needs Service** button is highlighted
- Click on any of the photographs to show a full size image in greater detail.
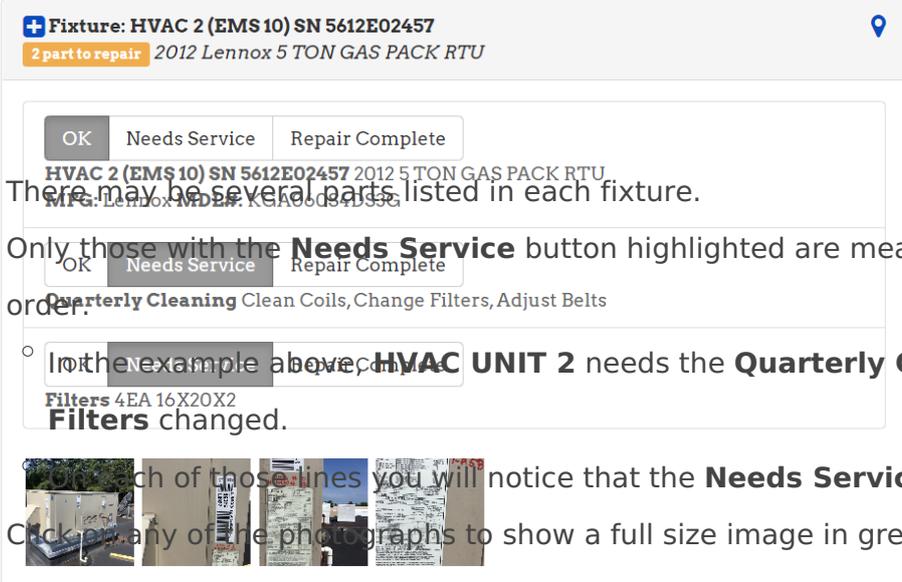
And, If you aren't available to conduct the work as requested:

- Type a note in the field labeled **I reject Workorder...** and click on the reject button.
  - This will notify the sender so the Work Order can be assigned to another vendor.

Any notes you would like to make about this Work Order can be entered in the **Add a Note** section **before** or **after** completion of the Work.

Sample Work Order

Congratulations! You made it! Here is a sample of a Sytewise Work Order.

Click here for a full explanation of all of the features.

Vendor Profile Help

Editing your information in the Vendor Profile.

Vendor Profile Help

On the Vendor Account Setting Page you can:

- Enter and update your Company Name, Address and Contact Information.
- Add a description of the work you are available to do.
- Add a copy of your Certificate of Insurance to keep your record of Insurance up to date.

Account Settings for Elemental Air

Welcome, Elemental Air

Account Settings

Name

Elemental Air

Company Email

jeff@sytewise.com

Company Phone

(615) 319-8277

Company Address

123 Main Street Nashville TN 37206

Description

Sample Vendor Account

Save

Files and Insurance

Add An Insurace Policy

To add an Certificate of Insurance:

- Click the button labeled "Add An Insurance Policy"
- Enter the details of your insurance policy including:
  - Name of your Insurance Provider
  - Insurance Policy Number
  - The Start and End dates of your current policy
  - The contact Agent at your Insurance along with their contact information.
- Click Add

Files and Insurance

Add An Insurace Policy

Add an insurance policy

Company Name *

Insurance Company Name

Policy Number *

The Policy Number

Start Date *

📅 | 2020-11-30

End Date *

📅 | 2021-11-30

Contact Name

Name of insurance contact

Contact Phone

Phone number including areacode

Contact Email

Insurance email address

Close | **Add**

Once you've entered the details:

- You will see your insurance Policy Listed
-

You can upload a copy of your COI

- ○ Click on Choose File
- ○ Navigate to a JPG or PDF of the Certificate of Insurance you want to upload
- ○ Click Upload

After you click Upload, and will appear for that Certificate of Insurance.

- Indicate the name of the project and location when naming the file that you upload.
  - ○ example: bargain hunt cookeville hvac coi
  - ○ don't worry about adding the dates to the file name. They will appear automatically.