

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

Company Email

Company Phone

Company Address

Description

Save

Files and Insurance
Add An Insurance 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 Insurance 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

Files and Insurance

Add An Insurance Policy

Insurance Co.

Policy # Policy ABC123

JEFF THORNHILL (161) 531-9827

jeff.thornhill@comcast.net

Nov 30, 2020 - Nov 30, 2021

Choose File

No file chosen

Upload A PDF or JPG

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.

Files and Insurance

Add An Insurance Policy


Insurance Co.

Policy # Policy ABC123

JEFF THORNHILL (161) 531-9827

jeff.thornhill@comcast.net

Nov 30, 2020 - Nov 30, 2021

sample
COI.pdf



Revision #2

Created Mon, Nov 30, 2020 11:14 PM by Jeff Thornhill

Updated Mon, Nov 30, 2020 11:48 PM by Jeff Thornhill