

CONTRACTORS/VENDORS MASTER LIST

IMPAK helps you keep track of your contractors and vendor activities on work orders, purchase orders, certificates of insurance and property service contracts. You will only need to create one record for each contractor or vendor company in the “Contractors/Vendors Master List”. Then, each contractor/vendor company can be assigned to one or multiple properties that use that same company.

Setup & Master Lists

Work Order Management

Projects / Inspections

Tenant Management

Invoicing

Preventive Maintenance

Materials & Purchasing

Operating Reports

Setup & Master Lists

User Administration

Help & Support

Property Notebook

Log Out

SETUP & MASTER LISTS

ACTIVITY	DESCRIPTION
PROPERTY SETUP	Update property records. Configure job types, maintenance techs, and contractors/vendors for each property.
DEPARTMENT SETUP	Define the departments for your portfolio.
SERVICE LOCATIONS MASTER LIST	Maintain the master list of Service Locations.
JOB TYPES MASTER LIST	Maintain the master list of job types that can be selected on work orders.
TECHNICIANS MASTER LIST	Maintain the master list of company personnel that can be selected for work order assignment.
TECHNICIAN DISPATCHING RULES	Define and sort the technician pick-list to be utilized when dispatching work orders.
TSR ROUTE MASTER LIST	Maintain the master list of email addresses to which notification of online Tenant Service Requests will be sent.
MANAGEMENT ALERT MASTER LIST	Maintain the master list of management email addresses to which designated high-priority work orders will be sent.
PROPERTY INSPECTION SETUP	Create and maintain an unlimited number of property inspection templates.
CONTRACTORS/VENDORS MASTER LIST	Maintain the master list of contractors and vendors that can be selected on work orders and/or purchase orders.
CONFERENCE ROOM SETUP	Create and maintain the list of tenant amenities for each property, such as conference rooms and freight elevators.
PROPERTY PROJECT CATEGORIES	Create and maintain the drop-down list of property project categories

Click "Contractors/Vendors Master List"

Contractors/Vendors Master List

The Contractors/Vendors Master List is located in "Setup & Master Lists". The list is sorted alphabetically with helpful "tabs" at the top of the page that filter the list on the first letter of the company name.

The master list displays:

- ▶ the contractor/vendor company name
- ▶ the city where the contractor/vendor is located
- ▶ the service type each vendor typically performs
- ▶ the number of work orders performed by the contractor/vendor
- ▶ and a link to any attachments (files) related to the contractor/vendor

CONTRACTORS/VENDORS MASTER LIST

Create New Contractor/Vendor
Certificate of Insurance

ALL # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Contractor	Contractor/Vendor	Active	City	Service Type	Work Orders	Properties	Attachments

Filter the list on the first letter of the company name

Add a Contractor/Vendor

Click "Create New Contractor/Vendor" and complete the form.

CONTRACTORS/VENDORS MASTER LIST

Create New Contractor/Vendor
Certificate of Insurance

ALL # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Contractor	Contractor/Vendor	Active	City	Service Type	Work Orders	Properties	Attachments

Click "Create New Contractor/Vendor"

Add a Contractor/Vendor (Continued)

The contractor/vendor **company name** is required.

The contractor/vendor **"Email"** and **"CC"** fields are not required, but please enter at least one primary email address so IMPAK can send the contractor/vendor email notifications when they occur while processing work orders or purchase orders.

The field labeled **"Contractor/Vendor"** allows you to indicate in which IMPAK programs the contractor or vendor should appear. If you select **"Contractor Only"**, that contractor will only appear for selection in work order management, certificates of insurance and property service contracts. If you select **"Vendor Only"**, that vendor will only appear for selection on purchase orders. If you select **"Contractor/Vendor"** (the default), that company will appear for selection in all IMPAK programs.

When finished, click **"Save"** to return to the **"Contractors/Vendors Master List"**, or click the **"Save/Add Properties"** button to save the record and to then assign this vendor to one or more properties.

The screenshot shows a form titled "CREATE NEW CONTRACTOR/VENDOR" with the following fields and callouts:

- Company Name:** Points to the "* Contractor Company Name:" text and the first input field.
- Contractor/Vendor:** Points to the "Contractor/Vendor:" dropdown menu.
- Email, CC:** Points to the "Email:" and "CC Email:" input fields.
- Save:** Points to the "Save" button.
- Save/Add Properties:** Points to the "Save/Add Properties" button.

Below the form are two callout boxes:

- Click "Save" to return to the "Contractors/Vendors Master List"
- Click "Save/Add Properties" to save the record and to then assign this vendor to one or more properties

Assign Properties

Click the "Properties" link corresponding to each contractor/vendor record.

CONTRACTORS/VENDORS MASTER LIST							
Create New Contractor/Vendor						Certificate of Insurance	
ALL # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z							
Contractor	Contractor/Vendor	Active	City	Service Type	Work Orders	Properties	Attachments
Best Painting	Vendor/Contractor	Yes	Bear, DE	Painting	3	Properties ✓	Attachments
Budget Signs	Vendor/Contractor	Yes	Phoenix, AZ	Signs	5	Properties ✓	Attachments
Building Engineer	Vendor/Contractor	Yes	Woodinville, WA	General	1286	Properties ✓	Attachments
Burris Pest Elimination	Vendor/Contractor	Yes	Atlanta, GA	Pest Control	0	Properties ✓	Attachments
BW Control System	Vendor/Contractor	Yes	Cincinnati, OH	Building Controls	1	Properties ✓	Attachments

Click "Properties"

Highlight the properties to assign to this contractor vendor from the properties master list on the left side of the page, then click the "Add Selected" button. You can hold the "Ctrl" button to select specific multiple properties from the list, or you can hold the "Shift" key to select a whole range of properties from the list.

CONTRACTOR/VENDOR SETUP

PROPERTIES MASTER LIST

3200 Salk Dr
4860 Parkway Dr
Anderson Rd 230
Best Place
Centerhill Blvd 260
Cornell Park
Fairfield Place Dr
Fountain Point Plaza
Mason Rd
McAuley Plaza
Midtown Plaza
Mohawk Drive
One Sugar Creek
Orchard Knoll

Add Selected

PROPERTIES USING BUDGET SIGNS

Anderson Rd 230
Centerhill Blvd 260
Fountain Point Plaza

Remove Selected

Back to Contractors/Vendors Master List

Add Selected

Remove Selected

Hold "Ctrl" key to select specific multiple properties.
Hold "Shift" key to select a whole range of properties.

Update Contractor/Vendor Records

Go to the "Contractors/Vendors Master List" and click one of the alphabetical "tabs" at the top of the page.

Find the contractor/vendor company, and then click on the contractor/vendor name.

Update the form and click the "Save" button.

CONTRACTORS/VENDORS MASTER LIST

[Create New Contractor/Vendor](#)
[Certificate of Insurance](#)

ALL # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

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Budget Signs	Vendor/Contractor	Yes	Phoenix, AZ	Signs	5	Properties ✓	Attachments
Building Engineer	Vendor/Contractor	Yes	Woodinville, WA	General	1286	Properties ✓	Attachments
Burriss Pest Elimination	Vendor/Contractor	Yes	Atlanta, GA	Pest Control	0	Properties ✓	Attachments
BW Control System	Vendor/Contractor	Yes	Cincinnati, OH	Building Controls	1	Properties ✓	Attachments

Click on the contractor/vendor name

UPDATE CONTRACTOR/VENDOR

* Contractor Company Name:

Address:

City / State / Zip:

Phone #:

Fax #:

Contact:

Contact Phone #:

Contractor/Vendor: ▼

Active: Yes ▼

Email:

CC Email:

Service Type:

Special Notes:

Click "Save"

De-Activate Contractor/Vendor Records

To accurately preserve older information, IMPAK does **not allow** users to completely “delete” contractors or vendors if that contractor/vendor has been selected on work orders, purchase orders or property service contracts.

You can, however, make a contractor or vendor “Inactive”. Inactive contractors/vendors do not appear for further selection on work orders, purchase orders or property service contracts. Inactive contractors/vendors also do not appear in reports (unless there is specific data related to that company for the time period selected for the report).

To make a contractor or vendor inactive:

Go to the “Contractors/Vendors Master List” and click one of the alphabetical “tabs” at the top of the page.

Find the contractor/vendor company, and then click on the contractor/vendor name.

CONTRACTORS/VENDORS MASTER LIST

ALL # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

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Building Engineer	Vendor/Contractor	Yes	Woodinville, WA	General	1286	Properties ✓	Attachments
Burris Pest Elimination	Vendor/Contractor	Yes	Atlanta, GA	Pest Control	0	Properties ✓	Attachments
BW Control System	Vendor/Contractor	Yes	Cincinnati, OH	Building Controls	1	Properties ✓	Attachments

De-Activate Contractor/Vendor Records (Continued)

Select "No" from the "Active" field, then click the "Save" button.

UPDATE CONTRACTOR/VENDOR

* Contractor Company Name:

Address:

City / State / Zip:

Phone #:

Fax #:

Contact:

Contact Phone #:

Contractor/Vendor: ▼

Active: ▼

Email:

CC Email:

Service Type:

Special Notes:

Select "No"

Click "Save"

Attachments

In the Contractors/Vendors Master List, you can attach files that relate to specific contractors/vendors. The attached files can be of almost any type of digital document, including MS Word, Excel, PDF and photos.

CONTRACTORS/VENDORS MASTER LIST							
Create New Contractor/Vendor							Certificate of Insurance
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Burris Pest Elimination	Vendor/Contractor	Yes	Atlanta, GA	Pest Control	0	Properties ✓	Attachments
BW Control System	Vendor/Contractor	Yes	Cincinnati, OH	Building Controls	1	Properties ✓	Attachments

Click "Attachment"

ATTACHMENTS			
Budget Signs			
Attach New File			
Date	Attachment File Name	Description	Created By
Back to Vendors Master List			

Click "Attach New File"

ATTACH NEW FILE	
Budget Signs	
<p>Note: Attachment Name (not including the path) should be less than 50 characters, and should not include parenthesis, periods, commas, number signs, percent signs, or ampersands. File size cannot exceed 8 MB.</p>	
* Attachment Name:	<input type="text"/> <input type="button" value="Browse..."/>
* Description:	<input type="text"/>
* Created Date:	<input type="text" value="1/8/2014"/>
* Created By:	<input type="text" value="Jennie Wilson"/>
<input type="button" value="Upload"/> <input type="button" value="Cancel"/>	

Click "Upload"