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

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 ameneties 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



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 Contractor/Vendor Active City Service Type Work Orders Properties Attachments



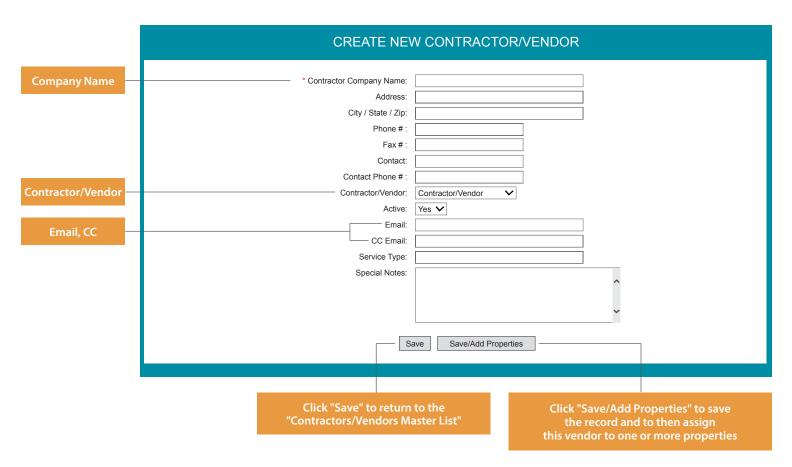
Add a Contractor/Vendor (Continued)

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.



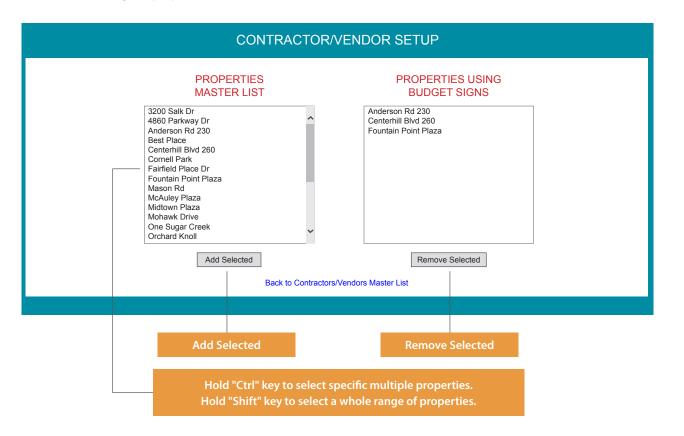


Assign Properties

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

Create New Contractor/Vendor 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 Certificate of Insurance								
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	
			1					

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.



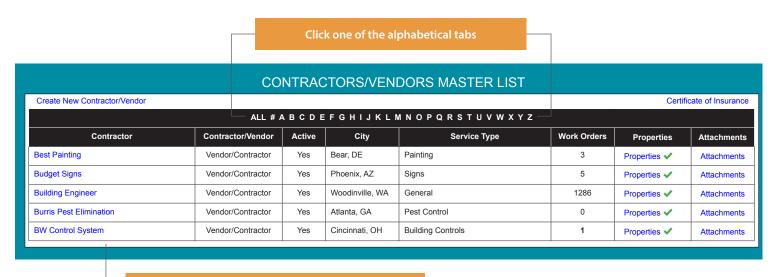


Update Contractor/Vendor Records

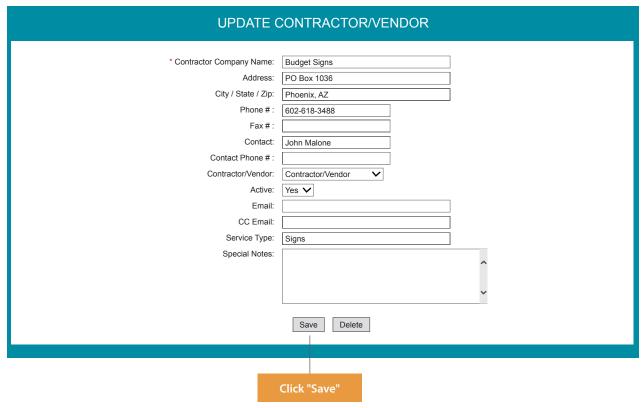
Go to the "Contractors/Vendors Master List" and click one of the alphabetical "tabs" at the top of the page.

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

Update the form and click the "Save" button.



Click on the contractor/vendor name





De-Activate Contractor/Vendor Records

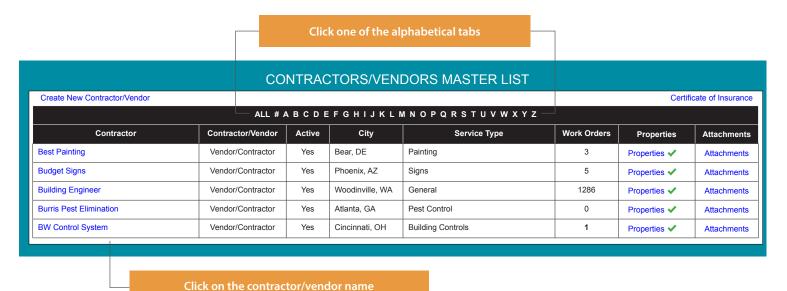
To accurately preserve older information, IMPAK does not allow users to completely "delete" contractors or vendors if that contractor/vendor has been selected on work orders, purchase orders or property service contracts.

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.





De-Activate Contractor/Vendor Records (Continued)

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

	UPDATE CONTRACTOR/VENDOR					
Select "No"	* Contractor Company Name: Address: City / State / Zip: Phone #: Fax #: Contact: Contact Phone #: Contractor/Vendor: Active: Email: CC Email: Service Type: Special Notes:	Budget Signs PO Box 1036 Phoenix, AZ 602-618-3488 John Malone Contractor/Vendor No V Signs				
		Save Delete				
		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									
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 "Attachment"



