

Enable Vendor (Setup)

Last Modified on 07/18/2024 3:44 pm EDT



The following process outlines the setup required to successfully add a vendor and their rates to active services and service proposals. In order for the Vendor fields to display, **both** the selected Reason Code and Service Code must have vendor settings enabled.

The screenshot shows the 'ADD ACTIVE SERVICE' form with the following details:

- REASON CODE:** NEW VENDOR
- START DATE:** 07/18/24 Thursday
- Week:** 29 (B)
- Rate:** 2.45 per cubic yard (new)
- QTY:** 1
- EQUIPMENT:** 8 Yard FL
- SERVICE CODE:** 8 Yard Trash Service
- FREQUENCY:** 1x per week
- PER UNIT:** 85.0000
- SERVICE FEES:** 85.00 month
- VENDOR:** Vendor Direct
- VENDOR RATE:** 65.00
- SERVICE DAYS:** Mon (checked), Tue, Wed, Thu, Fri, Sat, Sun
- REQUESTED BY:** (empty field)
- SERVICE NOTES:** (empty text area)
- FL Delivery:** (checked)
- ROUTE:** (empty dropdown)
- DATE:** 07/18/24 Thursday
- WORK ORDER NOTES:** (empty text area)

A table at the bottom of the form shows service charges:

SERVICE CHARGES	RATE	UOM	NO CHARGE QTY	EST QTY	MINIMUM TYPE	MINIMUM	MAX WEIGHT	OVER MAX WEIGHT RATE	VENDOR RATE	WORK TYPES
Front Load 08Y...	\$ 32.6985	each	0						\$ 20.00	1

Permissions

The following setup permissions are required for successful vendor setup:

Permission ID	Permission Name
23	Setup \ Account
118	Setup \ Services

Reason Code Setup

Pathway: Setup > System > Reason Code

The following setup is required to display vendor fields in the add/edit service screens for active services and proposals based on the reason code if:

- Reason Code **Type** is either 'Add Service' or 'Update Service'
- Enable Vendor is set to 'Yes'

UPDATE SERVICE CODE			
Service Code		Surcharges	
SERVICE CODE	FL08T	ACTIVE	Yes
NAME	8 Yard Trash Service	ENABLE ROUTING	Yes
LINE OF BUSINESS	Commercial	REQUIRE FREQUENCY	Yes
EQUIPMENT TYPE	8 Yard FL	ENABLE DRIVER UPDATE	No
MATERIAL TYPE	MSW	ENABLE ACCOUNT SIGNATURE	No
UOM	month	ENABLE DRIVER SIGNATURE	No
TAXABLE	Yes CLASS	ENABLE WORK ORDER MINIMUM	No
GL ACCOUNT	Service Income:Service/Fee Incom	ENABLE RENTAL FEE	No
TEMPORARY SERVICE GL ACCOUNT		ENABLE DEFAULT DESTINATION	No
PRORATION METHOD	Calendar Days - Start and End	ENABLE NEGATIVE AMOUNT	No
VACATION HOLD PRORATION METHOD	Do Not Prorate	ENABLE ESTIMATES TRACKING	No
BILL WHILE ON CREDIT HOLD	No	ENABLE EQUIPMENT OWNERSHIP	No
IS AP TRANSACTION	No	ENABLE SHARE	No
EST MONTHLY VOL UOM		ENABLE VENDOR	Yes
IS SHELL	No	ENABLE SITE SERVICE CLASS	No
PRICING MODEL	None	ENABLE DISCOUNTS	No

Vendor Account Setup

Pathway: *Setup > Accounts > Account Class*

The following setup applies to creating a vendor account. Once a vendor account is created, it can be searched and applied when adding or updating a service.

1. Create an account class with 'Vendor' assigned to the **Type** field.
 - Review the Customer Portal Homepage setting in the Customer Portal tab consider assigning 'Vendor' as the homepage.
2. Create an account for the vendor with the Vendor account class assigned.

UPDATE ACCOUNT CLASS

Details | Customer Portal | Payment Processing | Status Management | Finance Charges and Other Fees

NAME: VENDOR | CREATE CONTACT DEFAULT: Account

ACTIVE: Yes | DEFAULT CONTACT SERVICE NOTIFICATION: Yes

TYPE: Vendor | GEOCODING TYPE: Roof Top

GL ACCOUNT: | GEOFENCE RADIUS (METERS): 30

GL SEGMENT: 12000 | NEW ACCOUNT NOTIFICATION TEMPLATE: |

DEPOSIT GL ACCOUNT: | REQUIRE GENERATOR TYPE: No

Vendor Direct | 49116001 | **Vendor Direct** | 49116001

123 Vendor St, Los Angeles, CA 90071-3301, US | **Active** | 123 Vendor St, Los Angeles, CA 90071-3301, Los Angeles County Downtown, Los Angeles, US | **Active**

DIVISION: QAWASTE | DIVISION: QAWASTE

ACCOUNT MGR: Aliana Cameros | CLASS: VENDOR

BILL GROUP: QA Billing Cycle | ADVANCE - MONTHLY Billed Thru

TERMS: Net 30 | INVOICE DELIVERY: Printed

CURRENT	1-30	31-60	61-90	91-120	120+	TOTAL
0.00	0.00	0.00	0.00	0.00	0.00	0.00

Auto Pay Not Enabled

HIGHLIGHTS | PENDING

ACTIVE SERVICES (1) | Vendor | TOTAL RECURRING \$ 100.00 | TOTAL VENDOR RECURRING \$ 50.00

QTY	SERVICE CODE	SERVICE ID	FREQUENCY	ACCOUNT N...	ACCOUNT RATE	START DATE	END DATE	VENDOR RATE
1	2 Yard Trash Service	C954	1x per week	Polly Pie 2 17198 No...	\$ 100.00 per month	06/03/24		\$ 50.00 per month

CALENDAR | July, 2024 | EVENTS | Appointment, AR, Cancellation, Complaint, Er

SUN	MON	TUE	WED	THU	FRI
Jun 30	Jul 1	Jul 2 Commercial: 1	Jul 3	Jul 4	Jul 5
Jul 7	Jul 8	Jul 9	Jul 10	Jul 11	Jul 12

Add/Edit Service (Active and Proposal)

When all setup is complete, and both the selected reason code and service code have vendor enabled, Vendor, Vendor Lookup and Vendor Rate fields are displayed on the Add / Edit Service screens.

ADD ACTIVE SERVICE

REASON CODE: NEW VENDOR START DATE: 07/17/24 Wednesday Week 29 (B)

QTY: 1 EQUIPMENT: 10 Yard Roll Off SERVICE CODE: 10 Yard Open Top Service FREQUENCY: PER UNIT: 0.0000 SERVICE FEES: 0.00 month MINIMUM PER MONTH:

VENDOR: VENDOR RATE:

REQUESTED BY:

SERVICE NOTES:

RO Delivery ROUTE: DATE: 07/17/24 Wednesday

WORK ORDER NOTES:

DEFAULT DESTINATION:

Map: A map showing the location of the service area, with a red pin indicating the location. The map includes labels for various locations such as North Branch, Almelund, Athens, Bethel, Martin Lake, Linwood, Stacy, Lindstrom, Shafer, Franconia, Dret, Wyoming, Forest Lake, Scandia, East Farmington, and Osceola. The map also shows the Carlos Avery State Wildlife Management Area.

SERV...	RATE	UOM	NO CHARGE	EST QTY	MINIMUM TYPE	MINIMUM	MAX WEIGHT	OVER MAX WEIGHT RATE	VENDOR RATE	WORK
CHA...			QTY							TYPES

SAVE

Enable 'Vendor Rate' for a Service Charge

Pathway: Setup > Services > Charge Code

In the Service Charges section of the add/edit service screen, a 'Vendor Rate' field is displayed and can be edited if the following setup exists:

1. Reason Code has Vendor enabled
2. Service Code has Vendor enabled
3. Charge Code has Vendor enabled

To add a vendor rate to a service charge, click within the Vendor Rate column and enter the rate that applies.

UPDATE CHARGE CODE

Charge Code | Surcharges | Default for Work Types

CHARGE CODE	FL08XP	ACTIVE	Yes
NAME	Front Load 08YD Extra Pickup	ENABLE NO CHARGE QUANTITY	No
DOT DESCRIPTION		ENABLE NEGATIVE AMOUNT	No
LINE OF BUSINESS	Commercial	ENABLE MAX. WEIGHT CHARGE	No UOM
EQUIPMENT TYPE	8 Yard FL	ESTIMATED AVERAGE WEIGHT	
MATERIAL TYPE		ENABLE MANUAL CHARGE	No
RATE UOM	each	ENABLE MINIMUM	No
TAXABLE	Yes CLASS	ENABLE VENDOR	Yes
GL ACCOUNT	Service Income:Commercial Service Incoi	ENABLE EST. CHARGE QUANTITY	No
TEMPORARY SERVICE GL ACCOUNT		PRICING MODEL	None
TYPE	Service	BILL ZERO AMOUNT CHARGE	No

ADD ACTIVE SERVICE

REASON CODE: NEW VENDOR

QTY: 1 EQUIPMENT: 8 Yard FL

VENDOR: Vendor Direct

SERVICE DAYS: Mon Tue

REQUESTED BY:

SERVICE NOTES:



SERVICE CHARGES	RATE	UOM	NO CHARGE QTY	EST QTY	MINIMUM TYPE	MINIMUM	MAX WEIGHT	OVER MAX WEIGHT RATE	VENDOR RATE	WORK TYPES
Front Loa...	\$ 32.6985	each	0						\$ 20.00	1

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Manual Entry