# 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, <u>both</u> the selected Reason Code and Service Code must have vendor settings enabled.

ADD ACTIVE	SERVICE														6	8
REASON CODE	NEW VENDOR		- 0	START DATE	07/18/24	Thursday	Week 2	9 (B) 2.45	per cubic ya	rd (new)						
QTY	EQUIPMENT		SERVICE CODE			FREQUENCY		PER UNIT	SERVICE I	FEES						
1	8 Yard FL	- 🔍 🛞	8 Yard Trash	Service	- 🛛	1x per week		85.0000	85.00	r	nonth					
0				_							N	orth Branch	DISPLAY A	LL LINES		ека септе
VENDOR		VEN	DOR RATE					N	lap -					Almeluno	a 🗸	(87)
Vendor Direc	t	65	00					10 m / 1	444-44							
SERVICE DAYS	🗸 Mon 📃 Tu	e 🗌 Wed	🗌 Thu 📄 F	ri Sat	Sun			-	Athens				<u>/   </u> }			
REQUESTED BY	,							Be	ethel		Le.	Stacy			S	t Croix Fa
										Marti	n Lake		Lindstron Chisago City	n Sł	afer	nia
SERVICE NOTES	5								- • J	Linwo	od	. <b>55</b>			95	Dresse
								•			-	Nyoming	1 · 48		Osceola	3.0
		ROUTE		DAT	F					Carlos Av	ery life	61	1		/	
V FL Deliver	y			- 🛞 07/	- '18/24 Thurs	day		-	- (s) 🧥 N	Managem Area	ent	Forest Lake		1	-	
	NOTES							H	am Lake		5		Sc	andia	Farming	ton Hc
WORK ORDER I	NOTES							AUSO	ogie	Keybo	ard shortc	ts Map dat	a ©2024 Google	Terms	Report a r	nap error
<b>•</b> •																
SERVICE CHARGE	S R	ATE U	DM NO	O CHARGE QTY	EST QTY	MINIMUM TYP	: N	MINIMUM M	AX WEIGHT		OVER MA	X WEIGHT R	ATE VENDOR	RATE	WORK TYPES	
Front Load 08Y	\$ 32.6	985 ea	ich	0									\$ 3	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'

REASON CODE SETUP							
TYPE All	Ŧ						
TYPE T LINE OF E	BUSINESS REASON CODE 🕇 NAME		EXTERNAL ID	SALES RESULTS REPORT TYPE	IS NEW OWNER	IS OLD OWNER	APPLY 1085 RULE
Add Service	EDIT REASON CODE		?	8	No	No	No
Add Service				aso	No	No	No
Add Service	ТҮРЕ	Add Service	~	N	No	No	No
Add Service	ID	2		N	No	No	No
Add Service				N	No	No	No
Add Service	NAME	test		N	Yes	No	No
Add Service	EXTERNAL ID			N	No	No	No
Add Service		<b>T</b> (0 )		aso	Yes	No	No
Add Service	SALES RESULTS REPORT TYPE	Temp / Seasonal	Ŧ	N	No	No	No
Add Service	IS NEW OWNER	No	~	easo	No	No	No
Add Service		No	_	N	No	No	No
Add Service	IS OLD OWNER	NO	Ť	aso	No	No	No
Add Service	APPLY 1085 RULE	No	~	aso	No	No	No
Update Service	EXCLUDE FROM 1085	No		aso	No	No	No
Update Service				easo	No	No	No
Update Service	EXCLUDE FROM COMMISSION	No	~	easo	No	No	No
Update Service	ENABLE TEMPORARY SERVICE	Yes	~	easo	No	No	No
Update Service				ased	No	No	No
Update Service	ENABLE VENDOR	Yes	-	ase	No	No	No
Update Service	CAPTURE COMPETITOR	No	~	ased	No	No	No
Update Service				ased	No	No	No
Update Service	ACTIVE	Yes	Ŧ	ase	No	No	No
Update Service				ased	No	No	No
Lindata Sanvica		vice Increase		Increase	No	No	No

## Service Code Setup

### Pathway: Setup > Services > Service Code Setup

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

• Enable Vendor is set to 'Yes'

UPDATE SERVICE CODE				?	8
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	Ŧ	
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	Do Not Prorate 👻	ENABLE ESTIMATES TRACKING	No	*	
	No	ENABLE EQUIPMENT OWNERSHIP	No	*	
	No	ENABLE SHARE	No	*	
		ENABLE VENDOR	Yes	*	
	No	ENABLE SITE SERVICE CLASS No			
	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.

Details       Customer Portal       Payment Processing       Status Management       Finance Charges and Other Fees         NAME       VENDOR       CREATE CONTACT DEFAULT       Account	UPDATE AC	COUNT CLASS												? 8	3
NAME       VENDOR       CEATE CONTACT DEFAULT       Account         ACTIVE       Yes       • <td< th=""><th>Details</th><th>Customer P</th><th>ortal</th><th>Pay</th><th>ment Proce</th><th>essing</th><th>Status Ma</th><th>anagement</th><th>Finan</th><th colspan="3">Finance Charges and Other Fees</th><th></th><th></th><th></th></td<>	Details	Customer P	ortal	Pay	ment Proce	essing	Status Ma	anagement	Finan	Finance Charges and Other Fees					
ACTIVE Yes  DEFAULT CONTACT SERVICE NOTFICATION Yes  TYPE Vendor GL ACCOUNT GL ACCOUNT DEFOSIT GL ACCOUNT DEFOSIT GL ACCOUNT DEFOSIT GL SEGMENT DEFAULT ACCOUNT CREDIT LIT DEFAULT ACCOUNT TERM DEFAULT ACCOUNT TERM DEFAULT ACCOUNT TERM DEFAULT ACCOUNT TERM DEFAULT REBATE PAYMENT TY DEFAULT REBATE PAYMENT	NAME				VENDOR			CREATE	CONTACT DEF	AULT	Acco	ount		Ŧ	
TYPE       Vendor       GeocoDING TYPE       Roof Top       Image: Comparison of the comp	ACTIVE				Yes			DEFAUL	T CONTACT SE		ON Yes			~	
GL ACCOUNT GL SEGMENT DEPOSIT GL ACCOUNT DEPOSIT GL SEGMENT DEFOSIT GL ACCOUNT DEFAULT ACCOUNT CREDIT LI DEFAULT ACCOUNT CREDIT LI DEFAULT ACCOUNT TERM DEFAULT REGATE PAYMENT TY DEFAULT REGATE PAYMENT TY DEFAULT BILL BY SITE GENERATE NEW SAP ACCOUN THICHLIGKITS PENDING CURRENT 1-30 31-60 0.00 0	ТҮРЕ				Vendor		•	GEOCO	DING TYPE		Root	Гор		-	
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DEPOSITIGL SEGMENT              49116             Vendor Direct             4911601             Vendor Direct             4911601             Vendor Direct             4911601             Vendor Direct             123 Vendor St             Los Angeles, CA 90071-3301             Us             VENDOR             Us             VENDOR             Us             VENDOR             Vendor Direct             Vendor             Vendor Direct             Vendor             Vendor Direct             Vendor             Vendor Direct             Vendor             Vendor Direct             Vendor Direct             Vendor             Vendor             Vendor Direct             Vendor             Vendor Direct             Vendor Direct             Vendor             Vendor Direct             Vendor             Vendor Direct             Vendor             Vendor Direct             Vendor             Vendor Direct             Vendor	DEPOSIT GL	ACCOUNT					0	PEOLID	CENERATOR	TVDF	No			_	
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DEFAULT REBATE PAYMENT TY	DEFAULT AC	COUNT TERM			TERMAC		Not 30	CLASS	VEND	DR		Los Angele US	15	SERVICE REG	JON
DEFAULT BILL BY SITE       CURRENT       1-30       31-60       61-90       91-120       120+       TOTAL       TOTAL       TAX REGION ( TAX REGION ( Auto Pay Not Enabled         GENERATE NEW SAP ACCOUNT       0.00 <td>DEFAULT REE</td> <td>BATE PAYMENT TY</td> <td>1</td> <td></td> <td>INVOICE I</td> <td>DELIVERY</td> <td>Printed</td> <td>BILL GROUP ADVANCE - M</td> <td>QA Bil ONTHLY Billed</td> <td>ling Cycle Thru</td> <td></td> <td></td> <td></td> <td>SOURCE</td> <td></td>	DEFAULT REE	BATE PAYMENT TY	1		INVOICE I	DELIVERY	Printed	BILL GROUP ADVANCE - M	QA Bil ONTHLY Billed	ling Cycle Thru				SOURCE	
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HIGHLIGHTS       PENDING         A CTIVE SERVICES (1)       Vendor <ul> <li>QTY</li> <li>SERVICE CODE</li> <li>SERVICE ID</li> <li>FREQUENCY</li> <li>ACCOUNT N</li> <li>ACCOUNT RATE</li> <li>START DATE</li> <li>END DATE</li> </ul> VENDOR RATE           I         2 Yard Trash         C954         1x per week         Polly Pie 2         \$100.00 per month         06/03/24         \$50.00 per month         06/03/24         \$50.00 per month         06/03/24         \$50.00 per month         91/13/98 No         Yendor Rate         Yendor	GENERATE N	IEW SAP ACCOUN							Auto Pay N	ot Enabled				TAX EXEMPT	т
A ACTIVE SERVICES (1) Vendor			HIGHLIG	GHTS				PENDIN	5						
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Service     17198 No       CALENDAR     July, 2024     > EVENTS     Appointment, AR, Cancellation, Complaint, Er       SUN     MON     TUE     WED     THU       Jun 30     Jul 1     Jul 2     Jul 3     Jul 4       Jun 30     Jul 1     Jul 2     Jul 3     Jul 4			Ŧ	QTY SI 1 2	Yard Trash	SER	C954	FREQUENCY	ACCOUNT N	ACCOU	NT RATE	06/03/24	END DATE	\$ 50.00 per mor	: co nth
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Jul 7 Jul 8 Jul 9 Jul 10 Jul 11 Jul					Jul 7		Jul 8	3	Jul 9		Jul 10	)	Jul 11	ſ	lul 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	2 😣
REASON CODE         NEW VENDOR         Image: Constraint of the second se	9 (6) PER UNIT SERVICE FEES MINIMUM PER MONTH 0.0000 0.00 month
VENDOR RATE	DispLAY ALL LINES OF BUSINESS North Branch Almelund Athens Chisago City Ve Ve Ve Ve Chisago City Chisago
ROUTE     DATE       Image: Constraint of the second	Carlos Avery State Wildlife Management Area bdover Keyboard shortcuts Map data ©2024 Google Terms Report a map error
SERV RATE UOM NO CHARGE EST QTY MINIMUM TYPE MINIMUM CHA QTY	MAX WEIGHT OVER MAX WEIGHT RATE VENDOR RATE WORK 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						? 8	
		Charge Code	Surcharges	Default for	r Work Types					
ADD ACTIVE	SERVICE	CHARGE CODE		FL08XP			ACTIVE	Yes		? 😣
REASON CODE	NEW VENDOR	NAME		Front Load 08	8YD Extra Pickup		ENABLE NO CHARGE QUANTITY	No	v	
QTY	EQUIPMENT	DOT DESCRIPTIC	N				ENABLE NEGATIVE AMOUNT	No	~	
1	8 Yard FL	LINE OF BUSINES	is	Commercial			ENABLE MAX. WEIGHT CHARGE	No 👻 UOM	~	
0		EQUIPMENT TYP	E	8 Yard FL			ESTIMATED AVERAGE WEIGHT			S OF BUSINESS
VENDOR		MATERIAL TYPE					ENABLE MANUAL CHARGE	No	~	
Vendor Direc	t	RATE UOM		each			ENABLE MINIMUM	No	~	St Croix F
SERVICE DAYS	Mon Tue	TAXABLE		Yes 📼	CLASS	Ŧ	ENABLE VENDOR	Yes	•	Shafer
REQUESTED BY	,	GL ACCOUNT		Service Incom	ne:Commercial Service	Incoi 👻	ENABLE EST. CHARGE QUANTITY	No	~	95 Dress 35
SERVICE NOTES	5	TEMPORARY SEI	VICE GL ACCOUNT			Ŧ	PRICING MODEL	None	v	Osceola
		ТҮРЕ		Service		~	BILL ZERO AMOUNT CHARGE	No	~	
<b>O</b> -							Keyr	poard shortcuts Amap data ©	2024 Google Terms	Report a map error
SERVICE CHARGES	RATE	UOM I	IO CHARGE QTY	EST QTY	MINIMUM TYPE	MINIM	UM MAX WEIGHT	OVER MAX WEIGHT RATE	VENDOR RATE	WORK TYPES
Front Loa	\$ 32.6985	each	0						\$ 20.00	1 🗢
									1	
									manual Ent	ry