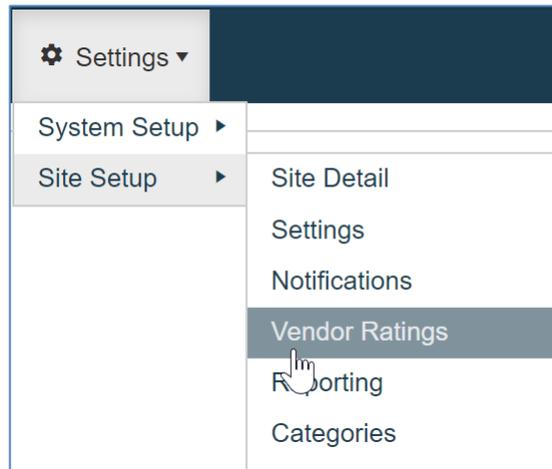


Vendor Ratings Setup

Vendor Ratings can be setup by the Administrator of the application, by going to Settings in the blue toolbar → Site Setup → Vendor Ratings.



Site Detail	Settings	Notifications	Vendor Ratings	Reporting	Categories	Master Documents	Document Templates	Terminology
Job Portal	Email Templates	Text Templates	Task Templates	Equipment				

Use Vendor Ratings?

Number of previous days to consider in rating

Rate based on average of all Items in range? Otherwise it is any 1 Item in range.

Rate based on open date NOT due date

<input type="text" value="1"/>	To	<input type="text" value="3"/>	Days overdue is considered	<input type="text" value="Green"/>
<input type="text" value="4"/>	To	<input type="text" value="7"/>	Days overdue is considered	<input type="text" value="Yellow"/>
<input type="text" value="8"/>	To	<input type="text" value="9999"/>	Days overdue is considered	<input type="text" value="RED"/>

Vendor status report footer:

your Customer Service is currently rated [status].
 We are proud of our Trade Partners rated in GREEN.
 Thank you!!!

(place [status] where you want status displayed)



- ✓ **Use Vendor Ratings? Check the box**
Note: Once this box is checked then the Vendor Status Report will be available to generate from your report profile. Reports → Vendor → Vendor Status.
- ✓ **Number of previous days to consider in rating – Apply the number of days.**
- ✓ **Rate based on average of all Work Orders in range? Otherwise it is any 1 Work Order in range.**
 - a. **If this box is not checked then it looks for the most offending**
Example: If there is one (1) work order that's the last rating such as Green. Two (2) work orders that meet the second rating such as Yellow then the status will appear as Yellow.

Vendor Ratings Setup

- ✓ *Rate based on open date NOT due date – check this box if this is applicable for your ratings.
Important: You don't have to check either of these boxes if they are not applicable to how you would like your ratings to be generated.*
- ✓ *Apply the parameters for the first rating period; X To X Days overdue is considered then add your status description. Such as Green, Yellow, Red, etc.*
- ✓ *Apply the parameters for the second rating period; X To X Days overdue is considered then add your status description. Such as Green, Yellow, Red, etc.*
- ✓ *Apply the parameters for the third rating period; X To X Days overdue is considered then add your status description. Such as Green, Yellow, Red (Needs Improvement), etc.*
- ✓ *Apply your Vendor Status Footer message. Remember to place the [status] where you desire the status to be displayed within your message.*

Sample - Vendor Ratings Footer Message: *(footer appears at the end of the Vendor Status Report)*

Sample 1:

your Customer Service is currently rated [status].

We are proud of our Trade Partners rated in GREEN.

Thank you!!!

However, checks will be in jeopardy for those rated in YELLOW.

All Checks will be held while you are rated in RED.

Please update status of scheduled appointments and completed work orders to Warranty Department before the close of business tomorrow.

GOOD CUSTOMER SERVICE IS ALWAYS GOOD BUSINESS

Sample 2:

your current rating with (BUILDER NAME) is [status].

Sample of the Vendor Status Report:

Oceanside Homes and Remodeling 7991 Shaffer Parkway, Suite 300 Ponte Vedra Beach, FL 80127 Office: (904) 555-2121 Fax: (303) 694-0527 www.punchlistmanager.net										
Vendor Status						11/02/2016				
For All Dates, sorted by Address										
Billys Plumbing						Phone: (303) 555-1212				
Turtle Shores						Fax: (866) 413-0928				
Incomplete Work Orders:										
Address	Lot #	Job ID	Homeowner Information	Phone 1:	Phone 2:					
7007 Turtle Bay Cove, Ponte Vedra Beach, FL 32082		TS16-7007	Emma Rose Lawrence	904-555-1212 - Home	904-232-5588 - Cell					
Work Order	List Type	Status	Area	Category/Sub Category	Submit	WO Open	WORepair	Due	Completed	Age
1003-002	Warranty	Scheduled with Vendor	Kitchen	Plumbing - Sink	10/28/2016	10/28/2016	10/31/2016	10/31/2016		5+
Service Requested: Replace the pipe under the sink										
Action Taken:										
Subtotal: 1	Average Response Time: 5	Aging	0-7 Days: 1	8-14 Days: 0	15-30 Days: 0	31+ Days: 0				
Billys Plumbing Your Customer Service is currently rated GOLD. We are proud of our Trade Partners rated in GOLD. Thank you!!! However, checks will be in jeopardy for those rated in Silver. All Checks will be held if you have a rating of Bronze. Please fax scheduled appointments and completed work orders to our Warranty Department at (FAX #) before the close of business today. GOOD CUSTOMER SERVICE IS ALWAYS GOOD BUSINESS!										