

Vendor Portal Setup

The Vendor portal is a secure portal that allows Vendors to log in with a unique username and password. This allows them to manage work orders, add notes (action taken), and view documents and FAQs.

To set the portal up, please select Settings>System Setup>Vendor Portal.

Step 1:

Within the Vendor Portal Screen, please setup the Welcome Message, Warranty Message, Contact Message, and FAQs once completed select save. **See Samples Below**

Note: These fields are optional not required.

Vendor Portal Welcome Message – Samples

Sample 1:

Welcome to (BUILDER NAME) - Warranty Management Systems. Please use this system to review and update work order requests. Please contact our customer support team at (PHONE #) if you have additional questions. We value your business and look forward to working with you.

Sample 2:

Welcome to the (BUILDER NAME) Vendor Portal!

Please access this portal regularly to review and update your service requests from (BUILDER NAME), and close all service requests within 24 hours of completion.

If you have any questions or concerns that cannot be answered in the FAQs tab, please contact (CONTACT PERSON). (See Contact us tab for further information).

Thank You!

Sample 3:

Welcome to (BUILDER NAME) - Warranty Management System. This system allows our Vendors to access information online 24/7. You have the capability to review work order requests, submit new scheduled changes, and submit action taken progression of work, to close work orders because they were completed and to review online reports. Please use this system to respond to inspection and/or work requests and print inspection/work orders. Please contact our warranty department at (BUILDER EMAIL) if you have additional questions. We value working with you and look forward to future success.

Vendor Portal Warranty Message – Samples

Sample 1:

Welcome to (BUILDER NAME) - Warranty Management System. Please use this system to respond to inspection and/or work requests and print inspection/work orders. Please call the homeowners within 24 hours of receipt of this notice to arrange to have the warranty claim totally resolved within 10 business days. At the time you remedy the issue, please ask our homeowners to sign off on the inspection/work order. Please fax the signed inspection/work order to (FAX #) or e-mail copy to (BUILDER EMAIL) within 24 hours of the sign-off. Please contact our warranty department at (BUILDER EMAIL) if you have additional questions. We value working with you and look forward to future success.

Sample 2:

When reviewing and adding action taken notes, please update the action taken with exactly what was done and completed. We appreciate you taking the time to be current.

Vendor Portal Contact Message – Samples

Sample 1:

You may contact the (BUILDER NAME) Customer care team at (PHONE #) or by email at (EMAIL ADDRESS)

Sample 2:

Add who you would like them to contact and their contact information.



Vendor Portal Setup

Vendor Portal FAQs – Samples

FREQUENTLY ASKED QUESTIONS:

1. What is the expected response time for a repair to be completed?

- If a trade day has been scheduled with the homeowner, it is expected that the repair will be completed at that appointment. If you feel more information or an inspection of the repair is required, this must be obtained before the trade day so that you arrive prepared to complete the work. Trade days will be scheduled with a minimum of 1 week's notice.
- If a trade day has not been scheduled, you have 14 calendar days (2 weeks) to complete the work.

2. How quickly am I expected to contact the homeowner if there is no scheduled trade day?

- You are expected to contact the customer within 24 hours of the generation of the service request or work order.
- If you are unable to contact the homeowner, we ask that you try a minimum of 3 times within the first week, and inform (BUILDER NAME) of this failure.

3. What if I am unable to attend a scheduled trade day?

- With the exception of long lead items, you will be expected to attend any trade day that has been scheduled with one week's notice.
- If a part is on back order, or an emergency arises and you cannot attend, please contact the Main Contact (usually the Warranty Tech) immediately.
- Be advised that unexcused absences from trade days can result in fines.

4. I am receiving frequent errors on the portal, who should I contact?

You're local Punchlist Administrator:

- (CONTACT PERSON), (TITLE for Company) i.e. Construction/Warranty Administrator
(EMAIL ADDRESS) (PHONE #)

5. Who do I contact if I have forgotten my password or wish to change it?

You're local Punchlist Administrator:

- (CONTACT PERSON), (TITLE for Company) i.e. Construction/Warranty Administrator
(EMAIL ADDRESS) (PHONE #)

6. How do I inform (BUILDER NAME) that a repair has been completed?

- Open the work order
 - click on the Work Orders tab and double click on desired work order
 - or enter the work order number in "Item Number" and click Find
- Select View / Add Changes
- Enter date work was fully completed by selecting calendar icon beside Completed box.
- Record any notes you may want us to know regarding the repair in Action Taken.
- Select Submit Changes
- A pop-up window will inform you that item information has been updated – select OK

Vendor Portal Setup

7. Why does a work order that I have completed still show up in my portal as incomplete?

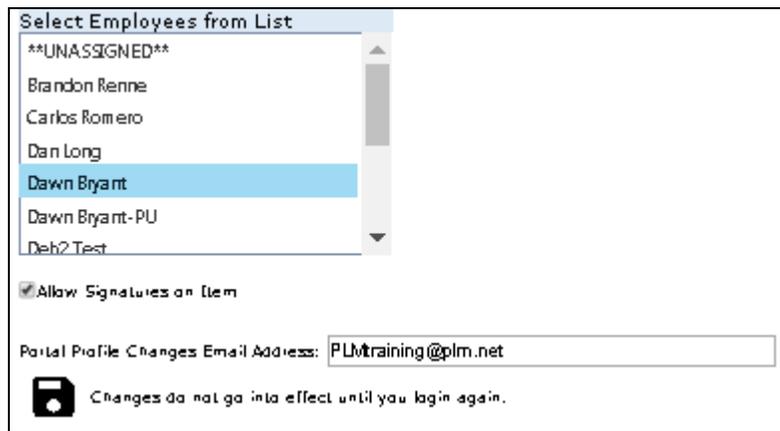
- Have you informed (BUILDER NAME) that the work is completed? See instructions in #6.
- If you have done this, but the work order is still in your list, it is possible (BUILDER NAME) has not yet reviewed and accepted the closure.
 - If you open the work order, you should be presented with a pop up that states “This item has changes not yet viewed or approved by the builder!”
 - If a pop up does not show up, you may have made an error when notifying (BUILDER NAME) or (BUILDER NAME) may have **declined the request to close**.
 - Try notifying (BUILDER NAME) one more time – if the work order persistently remains open, contact your local Punchlist Administrator (see #5).

8. Why can't I see a work order that I know exists?

- Once a work order is closed, it is no longer available to edit on the portal, and cannot be viewed on the Work Order tab.
- To view completed work orders select the Vendor Summary Report on the Reports tab:
 - Status – select closed
 - You may choose other parameters as desired
 - Run Report

Step 2:

- A. Select the employees you would like to display in the portal on the 'Contact Us' page
- B. Checkmark 'Allow Signatures on Item' if you would like the Vendors to be able to capture the homeowner signature on their Item
- C. Assign an email address for the portal profile so that if the company has a name change they can email this person.



The screenshot shows a web interface for selecting employees. At the top, it says "Select Employees from List". Below this is a scrollable list of names: **UNASSIGNED**, Brandon Renne, Carlos Romero, Dan Long, Dawn Bryant (highlighted in blue), Dawn Bryant-PU, and Deb? Test. Below the list is a checkbox labeled "Allow Signatures on Item" which is checked. Underneath is a text field for "Portal Profile Changes Email Address:" with the value "PLMtraining@plm.net". At the bottom left is a floppy disk icon, and next to it is the text "Changes do not go into effect until you login again."

Vendor Portal Setup

Step 3:

Option to setup Notifications, Settings>Site Setup>Notifications

Notifications can be sent to the Supervisor or Staff via email or text message when the Vendor submits a change through the Portal. If your company has more than one Site this can be applied to all Sites. See email below.

Notification Type:									
<input checked="" type="radio"/> Email <input type="radio"/> Text Message									
Notify When...	Threshold	Staff	Supervisor	Primary Owner	Secondary Owner	Email Template	Merge Fields Available	Apply to All Sites	
Vendor submits an update?		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<Use Default Template>	Item, List, Job, Project, Business, Site	<input type="checkbox"/>	
Project / Owner submits a request?		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<Use Default Template>	Job, Project, Business, Site	<input type="checkbox"/>	

Sample of email received using the Default Template.



To create a custom email template that can be assigned within the Notification screen and emailed to whom you would like to Notify (Supervisor or Staff) select Settings>Site Setup>Email Templates or Text Templates.

Step 4:

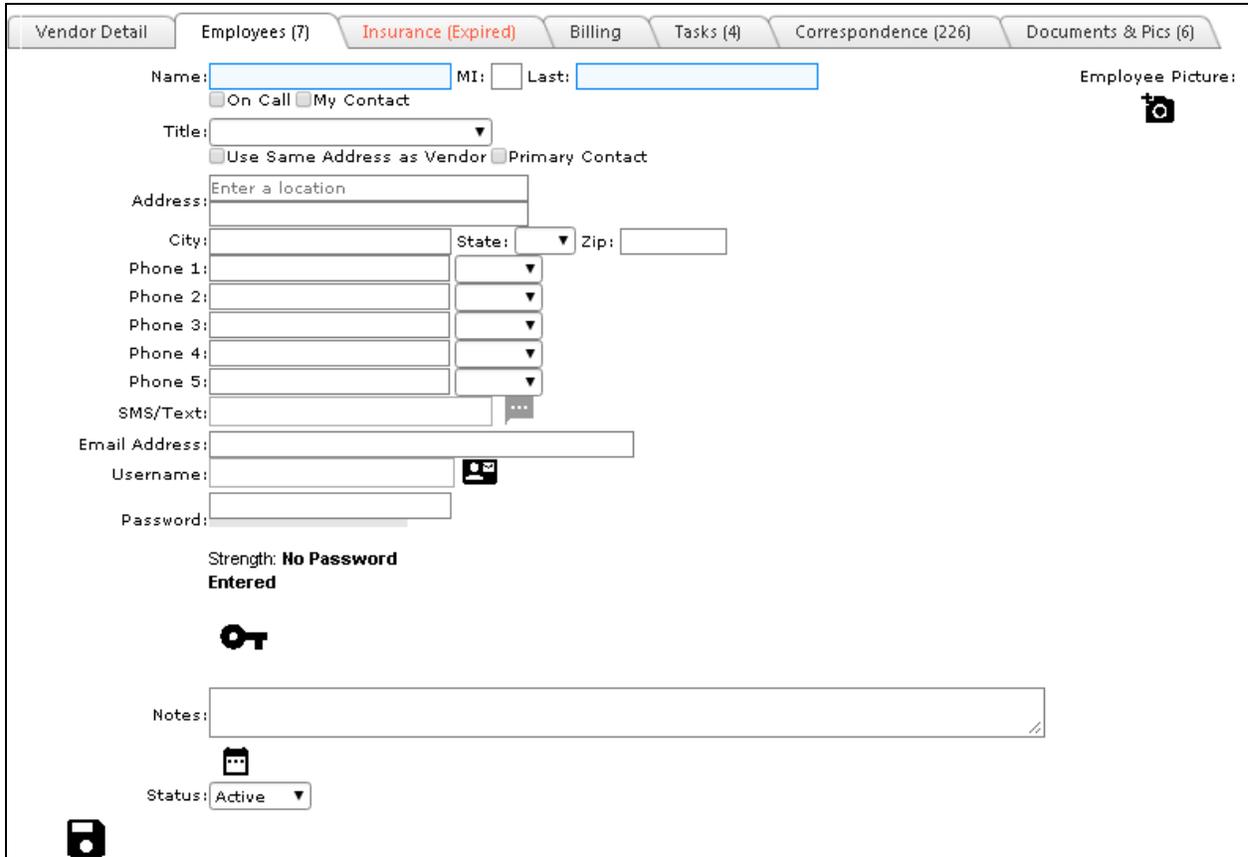
For security purposes, the username and password for the portal are setup at the Vendor Employee level. (See Screen Shot)

Note: Vendor Employee record(s) are required.

The reason it is setup this way is if the employee for that Vendor is no longer with the Company we strongly recommend that the username and password be removed and the record inactivated for security purposes. The username **MUST** be unique however since everyone has the ability to update their password and the password does not need to be unique we recommend a generic password for your company. Example: PLM_Warranty!. You will need to test the password on a Vendor Employee record to ensure it meets the minimum strength requirements for security purposes.

Once a password has been chosen we recommend the password be pasted into the Vendor Portal email template that will be used for each Vendor.

Vendor Portal Setup



Vendor Detail | Employees (7) | Insurance (Expired) | Billing | Tasks (4) | Correspondence (226) | Documents & Pics (6)

Name: MI: Last: Employee Picture: 

On Call My Contact

Title:

Use Same Address as Vendor Primary Contact

Address:

City: State: Zip:

Phone 1:

Phone 2:

Phone 3:

Phone 4:

Phone 5:

SMS/Text: 

Email Address:

Username: 

Password:

Strength: **No Password Entered**



Notes:



Status:



Step 5:

Sending the Vendor their Username, Password and 'How to Use' reference document.

Create a custom email template (Welcome to the Vendor Portal letter) this can be completed by selecting Setup>Site/Site Setup>Email Templates. Once the template is created this can be sent from the Vendor record through Correspondence>Email Contact.

NOTE: We furnish a sample email template that can be used and customized for your company.