

siterra | Knowledge Base Article

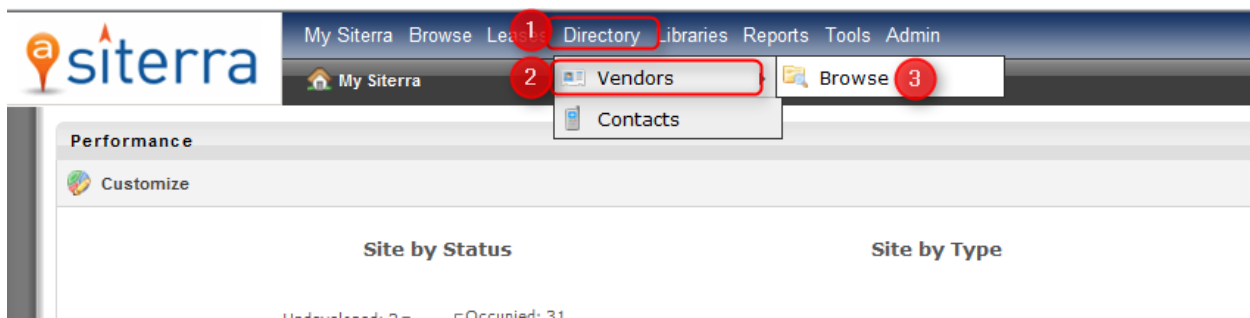
Leases – Create a New Vendor

Question:

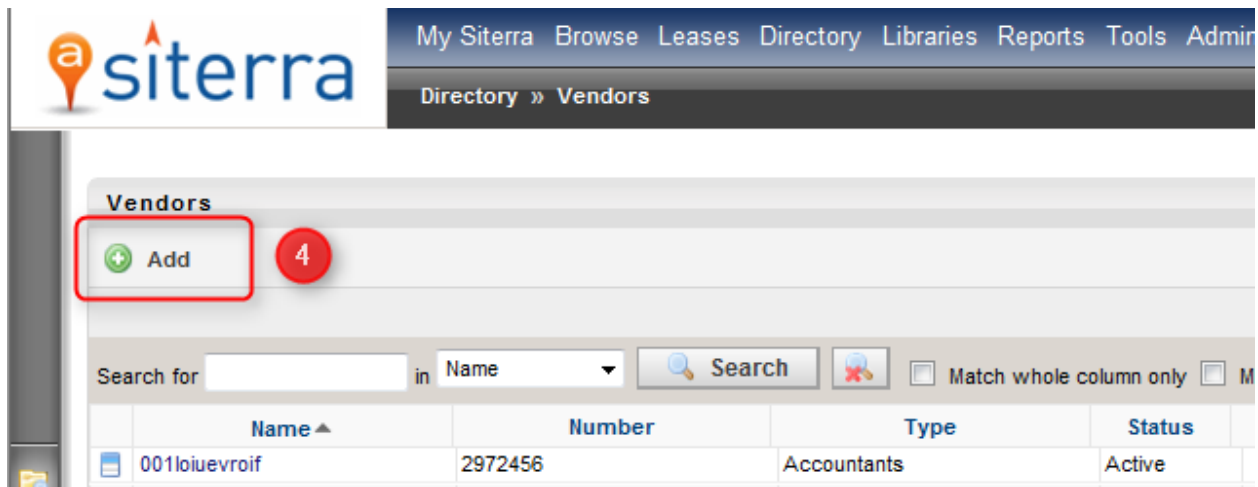
How can a new Vendor be created and added to a lease?

Answer:

To create a new Vendor, navigate to Directory (1) > Vendors (2) > Browse (3) as pictured below.



On the Vendors page a list of all of the existing Vendors will be visible. To add a new Vendor, select the "Add" button (4) in the top left corner.



A new screen will pop up. On the new screen, add the name of the new Vendor, Type, Status, Address, and even using the Rating function to help keep a simple record of the vendor's performance. Fill in any information regarding the new vendor then select 'Save and Close'.

Rating Details

Rating: ☒ None ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Vendor Details

Number:

* Name:

* Type:

* Status:

Attention To:

Vendor Code:

Federal Tax ID:

Web Page:

Description:

Primary Phone:

Phone Description:

Fax:

Primary Address

Street:

Done Internet | Protected Mode: Off 105%

Siterra will go back to the Vendor homepage, and from there the newly created Vendor can be selected from the list. Below is an example of what the new Vendor's page will look like. Any additional edits can be made here.

Vendors » Test Lawyer (2972862)

Details

Edit Delete Log

Number: 2972862
Name: Test Lawyer
Type: Lawyers
Status: Active
Attention To:
Vendor Code: 123456
Federal Tax ID: 152-5539
Web Page:
Primary Contact:
Description: Assist with litigations with tenants/landlords

Primary Phone: 555-555-5555
Phone Description: Office line, extension 5

Fax:
Rating: ★★★★★

Company Logo

Upload Clear

Primary Address

Street: 123 Mockingbird lane
Street2:
PO Box: P.O.13
City: Austin
County: Travis
State: Texas
Zip: 78758
Country: United States
Attention:
Care of:

Mailing Address

Analytics

Total Purchase Order: 0.00 USD
Total Invoice Outstanding: 0.00 USD
Total Invoice Outstanding Due: 0.00 USD
Total Invoice Paid: 0.00 USD

Projects

Project Name	Status	Start Date
No Records Found		

Contracts

Add

Name	Number	Status Name	Invoice Start Date	Current Commencement Date	Current Expiration Date	Vendor Number	Vendor Name
No Records Found							

Users

Users can only be associated to a Vendor from the User page.

Display Name	First Name	Last Name	Address	Company
No Records Found				

Contacts

Add

Display Name	First Name	Last Name	Address	Company	Primary E-Mail	Is User
No Records Found						

Where Used

Name	Number	Type Name	Status Name	Responsibility	Street	City	State
No Records Found							