Vendor On-Boarding

Connecting with Service Vendors on the Work Order Network

This document describes adding a vendor to the system and connecting with them via the Work Order Network. This is just one step in the larger Vendor On-Boarding process; please consult your company's Standard Operating Procedures for specific policies around vendor on-boarding. However, the typically this involves:

1. Identifying a prospective vendor
2. Qualifying that vendor
3. Collecting basic contact information (including the email address to connect with them)
4. Inviting the vendor and connecting with them (THIS DOCUMENT)
5. Collecting vendor compliance documentation, which may include:
    a. Signed Contract
    b. W-9
    c. Certificate(s) of Insurance
6. Assigning the Vendor to Work Orders/Schedules

Once you have found a qualified Service Vendor you wish to assign work, connect with them.

To Connect:

(1) Go to the "My Vendors" section found under the "WO Network" tab.

(2) This section lists all of the Vendors currently in your network. To add a Vendor to the Work Order Network press the "Add New" button on the bottom left of the screen.

NOTE: Before adding a new vendor make sure to search and confirm that the vendor is not already in your network.
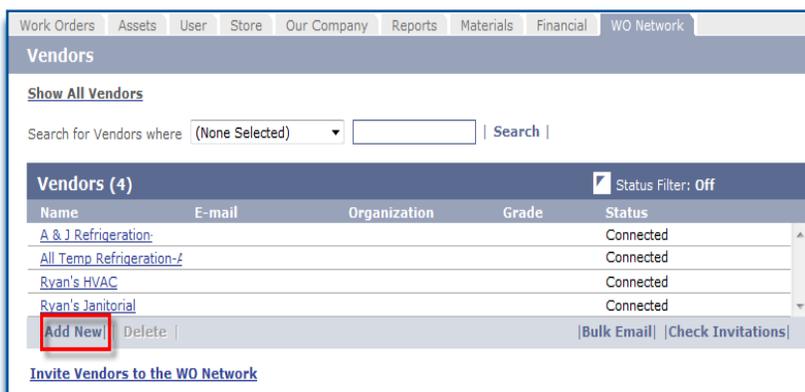

Figure 1: "My Vendors" page listing Service Vendors in Your Network

If you do not see the "Add New" button it means your User Role does not have the necessary access and you will have to get help from your system administrator.

(3) After pressing "Add New" a pop-up window will appear (Figure 2). At minimum, add the vendor's Name and Email address.

Be sure to have a valid email address entered in for the Vendor as this email address is where the invitation to connect to your network will be sent. The rest of the information in the dialog is only important if the vendor is NOT going to connect to the network.
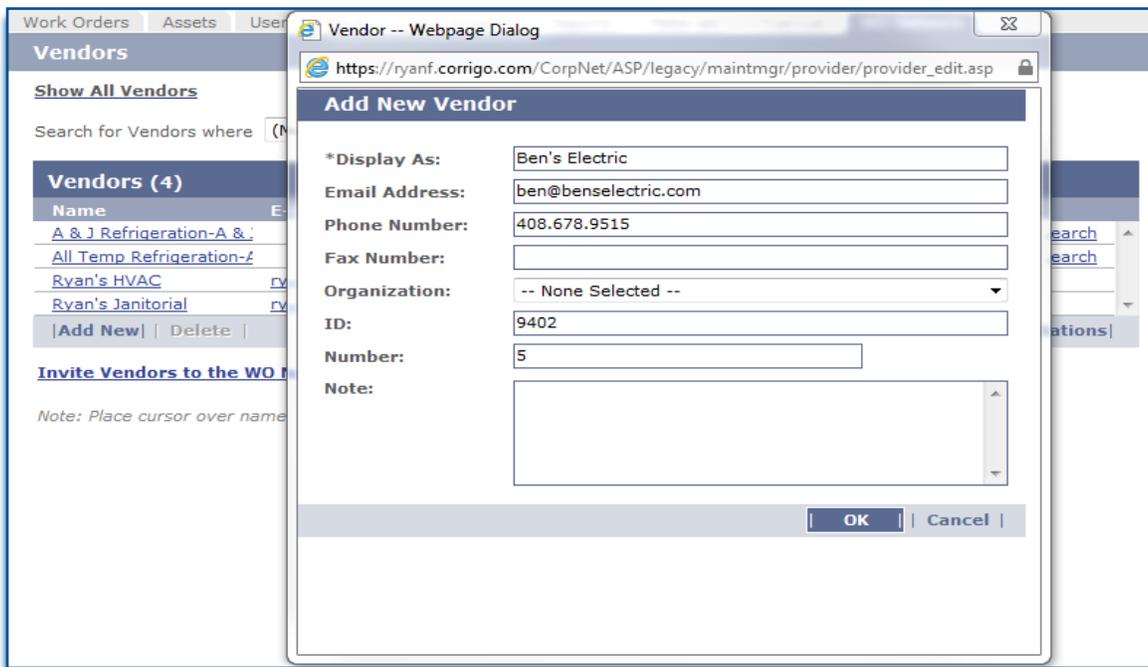

Figure 2: Add a New Vendor Pop-Up

(4) After pressing 'OK" on the Add New Vendor pop-up, you will be taken to the Vendor's information page (Figure 3). If you believe the vendor may already be a member of the Work Order Network, press the "Search" button. Otherwise, press the "Invite to Join the Work Order Network" link and confirm your intention in the dialog.

Figure 3: Service Vendor Details Pages

On your "My Vendors" page you will see the new Vendor listed as "Invited". This means that the Vendor has yet to activate their account through the email invitation sent in step 4. Once this status is changed from "Invited" to "Connected", you may send them work.

What the Vendor Does

The invitation is sent to the vendor as an email inviting them to join the Work Order Network.

If the Vendor has not previously joined the Work Order Network they will need to click on a link in the email and follow the instructions to complete a registration form and create a Work Order Network account to gain access to their WorkTrack system where they will receive and respond to work orders you send them.

Next Steps

If you wish to continue setting up your vendor, please go to: Vendor Advanced On-Boarding Topics