

# Quadpro Help Desk

## **Adding a New Supplier or Contractor:**

## Adding a new Supplier or Contractor to the service provider menu:

From the Contacts and Users menu , these two boxes will allow you to add a new contractor or supplier.

The screenshot displays two side-by-side list boxes for managing service providers. The left box, titled 'Service Provider Type', contains a list with four items: 'Job Request Originator' (JRC), 'Dundie School' (ODS), 'Scotts Academy' (SA), and 'Suppliers & Contractors' (SAC). Each item has a small orange circle with the number '0' next to it. The right box, titled 'Service Provider Name', contains a list with one item: 'Maintenance Team', which has a small orange circle with the number '389' next to it. Below each list box are buttons for 'Add' and 'Delete'. The right box also has a 'Show All' button.

Service Provider Type	Count
Job Request Originator	JRC 0
Dundie School	ODS 0
Scotts Academy	SA 0
Suppliers & Contractors	SAC 0

Service Provider Name	Count
Maintenance Team	389

In the service provider type column, you will have details listed by what they type of service they provide.

For example, your staff will be listed under Scotts Academy and within that heading, you will be able to create a sub category called 'Maintenance Team'.

To add a list of staff to a provider window to then view a list of details about that list.

[illegible]

From here, a new dialog box will open where you can enter the information about that certain contact.

[illegible]

To view a contact, double click on their name.

If you would like to amend the approvals that this category have, select '**Approvals**' from the bottom tab.

## Service Provider

Name	<input type="text" value="Maintenance Team"/>	<b>Permitted Services</b> <div><div></div><div></div><div></div><div></div></div> <div><input type="button" value="Add"/> <input type="button" value="Delete"/></div>
Type	<input type="text" value="Scotts Academy"/>	
Approved Contractor	<input type="checkbox"/>	
Approval Review Date	<input type="text" value="00/00/00"/>	
<b>Approvals</b>		
	<b>Required</b>	<b>Next Review Date</b>
Insurance	<input type="checkbox"/>	<input type="text" value="00/00/00"/>
Financial	<input type="checkbox"/>	<input type="text" value="00/00/00"/>
Health & Safety	<input type="checkbox"/>	<input type="text" value="00/00/00"/>
Child Protection	<input type="checkbox"/>	<input type="text" value="00/00/00"/>
ISO 9001	<input type="checkbox"/>	<input type="text" value="00/00/00"/>
ISO 14001	<input type="checkbox"/>	<input type="text" value="00/00/00"/>
Annual Spend Limit	<input type="text" value="£0"/>	Current Spend <input type="text" value="£0"/>
Maximum Contract Value	<input type="text" value="£0"/>	

Details

**Approvals**

From this tab you can select whether this provider is approved, when you would like to review that approval.

Depending on what that provider specialises in they will be required to have a certain document or qualification approved, which is what the following boxes are for.

You can also specifically allocate financial limits to each provider to ensure a more accurate measure of your budgets.