

## Managing Vendor and Contract Master Lists

A Contract Master List of equipment, personnel and supervisors is required for you to report this information on a Daily Work Report. A generic Vendor Master List is available for assignment to your contract

### Loading the Vendor List to a Contract

From the SiteManager Main panel click [Daily Work Reports](#) > [Reference Tables \(DWR+\)](#) > [Contract Master List](#).

Select your contract and the vendor you wish to work with.

A row of buttons for each type of master list is at the top and the [Vendor Master List](#) window will be displayed on the left. Equipment is the default list shown.

To add all records to the [Contract Vendor List](#) on the right: click the [Add All](#) button.

To select specific records: hold the SHIFT button down to select a range or hold the CTRL button down to independently select records. Once selected, press [Add](#).

All records moved will have the [Active](#) box checked. If you have some that are not going to be used for this contract, just uncheck the [Active](#) box on the item(s) that will not be used.

Press [Save](#).

Repeat for personnel and supervisors. It is not necessary to load staff.

The **Vendor Master Resource Load Utility** provides a method to load contractor specific equipment resources for each vendor in SiteManager. The process uses the built-in function in SiteManager called "Attachments".

From the [SiteManager Main Menu](#) click [Accessories](#) > [System Attachments](#).

Click on the row labeled [VendMast](#) then click on the Run icon.

You may select the method for searching the vendor list by clicking on either [Vendor Name](#) or [Vendor Number](#). The Vendor Number method works best.

In the area underneath "[Select Vendor Number](#)", type a portion of the number to go to that area of the list.

Click on the desired vendor number and the vendor name window will be populated. Be sure it is correct.

Under "[Load File Location](#)" select the drive, directory and the appropriate file name to be loaded.

Press **OK** to continue.

On the **Vendor and Load File Confirmation** window confirm the information shown in the **Current Master Items** and the **Master Items to be Loaded** windows

If correction is needed, press the “**Back**” button. **Exit** will take you out of the program completely.

If OK press the “**Load**” button.

Press the “**Load**” button, you will be advised how many items were loaded and if any of the items already existed. This will ensure that no duplicated Id’s are loaded.

### **Modifying the Vendor Equipment Master List**

NOTE: Please do not delete existing records from the list.

From the **SiteManager Main menu** double click **Daily Work Reports > Reference Tables(DWR+) < Vendor Master List**.

Select the vendor name or number desired and press **OK**.

Be sure that the equipment button at the top of the screen is selected.

Click in the lower portion of the screen and click the **NEW** button to add a record.

Type in the new equipment description with the equipment ID as the first characters in the field.

Tab over and enter the equipment ID.

Click **Save**.

To load the new equipment to the contract, follow the instructions for loading the Contract Master List.