Tracking Vendors and Contracted Work in MaintenanceDirect

MAINTENANCE MANAGEMENT

You can track contracted vendor work with transactions on work orders in MaintenanceDirect.

Tracking Vendor and Contracted Work

- Search for or pull up the work order that you would like to add contraced or vendor work to.
- On the work order page, scroll down to the **Transactions** section of the work order. *Note: You can also hover over the Shortcuts menu at the top of the page and click the Transactions link.*
- Click on the **New Purchase Transaction** link.
- The **Transaction Date** will default to the current date, but you may change it if necessary.
- Select **Contract Services** in the Type drop down box.
- Select the **Supplier** (vendor/contractor) from the drop down box. If the name does not appear in the list, you can add it by typing it into the open field. *Note: Always check the Supplier drop down list carefully to avoid creating duplicate Suppliers.*
- Enter an explanation of the service provided in the **Description** field.
- You can enter the cost as an hourly rate or as a grand total:
  - If hourly, enter the number of hours charged in the **Quantity** field and enter the hourly rate in the **Cost Each** field.
  - If entering a grand total, type the number 1 in the **Quantity** field and enter the total charge in the **Cost Each** field.
- Enter any additional sales tax, shipping/freight, or other charges as needed.
- You can mark this work order complete by checking the box at the bottom of the form.
- Click **Submit** to save the transaction.

☑ Trns Date	2/20/2015
☑ Type	Contract Services ▾
Select Supplier or type new one below.	Orkin ▾
Supplier	Orkin
Invoice/PO #	
Budget Code	-- Select Budget Account -- ▾
Purchased by	Admin,Karen
☑ Description	Yearly Pest Control Treatment
☑ Quantity	4
☑ Cost Each	100.00 % Markup 0 % Discount 0
	(Note: If no discount or markup, please leave blank. When used, t...
Sales Tax	20.00
Shipping/Freight	0.00
Other Charges	0.00
Amount	420.0000
	☐ Complete Work Order
	Submit

The Dude Says:

Once you are tracking vendors and contractors in your MaintenanceDirect account, you will be able to create meaningful reports showing the number of work orders and costs related to your Vendor/Contractor work. For more information on MaintenanceDirect transactions and reporting, see our webinar MD Transactions Working For You.