

# STANDARD OPERATING PROCEDURE

## Vendor Management

### Standard Operating Procedure

Vendor Management			
Owner		Current version	
Created by		Date of creation	
Approved by		Last updated date	

Document Version Management				
Date of update	Updated by	Approved by	Version	Description

## Objective:

The objective of this SOP is intended for “Order to Call” to build a vendor database where we can find out the best vendor for the maintenance/renovation works based on their credibility.

## Overview:

Whenever the maintenance department receives calls from the tenants for any issue to be fixed, they have to find the best vendor in terms of “pricing and quality” and send them to the tenant’s location to fix the problem. To find one, we need to have a database where we can find them quickly.

Hence, this SOP is designed to help the “Order to Call” team to build a vendor database where they gather all the necessary parameters of the vendor to decide their credibility. Credibility of the vendor is decided based on the following:

- Availability
- Number of reviews
- Ratings
- Number of years in business
- Affordable pricing
- Communicative
- Reliability
- Honesty

We consider the Average Rating of 4 and above with more reviews as “Good” and below as “Not good”.

Once we have a database, if we receive any maintenance call, we will check our vendor database and will choose the best vendor based on their credibility quickly.

## Procedure:

1. Go to “[Vendors Module](#)”. You will see a list of vendors and their available details.

*Note: Make sure that “missing info all including availability vendor” is filtered out.*

CRM | All Tabs | Home | Contacts | Leads | Quick Links Main | Properties | Property Details | Vendors | Services

missing info all including av...

Create Vendor | Actions

Total Records 728 | 100 Records Per Page | 1 - 100

**Filter Vendors by**

Search

**System Defined Filters**

- ☐ Touched Records
- ☐ Untouched Records
- ☐ Record Action
- ☐ Related Records Action

**Filter By Fields**

- ☐ Accounts
- ☐ Added in Order to Call
- ☐ areas they service
- ☐ Availability
- ☐ bank vendor uses
- ☐ Call this vendor 1st, 2nd, 3rd
- ☐ Categories Google scrape/notes
- ☐ Check here if Maryellen/team asked

<input type="checkbox"/> Vendor Name	who entered Vendor to z...	Do we have all required in...	Availability	Vendor Notes For Team	Phon
<input type="checkbox"/> Michael Kusy Evermark Property	Created from Rental Applicant Realtor			Please confirm and fill complete details as this is created from Rental Applicant Realtor <a href="https://crm.zoho.com/crm/org635091059/tab/CustomModule17/2135217000198873156">https://crm.zoho.com/crm/org635091059/tab/CustomModule17/2135217000198873156</a>	(860) 40
<input type="checkbox"/> Charlie Seifert Chesapeake Fi	Created from Rental Applicant Realtor			Please confirm and fill complete details as this is created from Rental Applicant Realtor <a href="https://crm.zoho.com/crm/org635091059/tab/CustomModule17/2135217000198551073">https://crm.zoho.com/crm/org635091059/tab/CustomModule17/2135217000198551073</a>	(301) 60
<input type="checkbox"/> Logan Marsh	Referred Handyman from Rental Applicant			Please fill complete details of this Referred Handyman from Rental Applicant <a href="https://crm.zoho.com/crm/org635091059/tab/CustomModule17/2135217000198551073">https://crm.zoho.com/crm/org635091059/tab/CustomModule17/2135217000198551073</a>	
<input type="checkbox"/> Hector Mayorga Long & Foster	Created from Rental Applicant Realtor	No		Please confirm and fill complete details as this is created from	+12407

Unread Chats | Channels | Contacts | Here is your Smart Chat (Ctrl+Space)

Ask Zia

- Click on vendor name. Then, all the details pertaining to that vendor will be displayed under the “Overview” tab.

CRM | All Tabs | Home | Contacts | Leads | Quick Links Main | Properties | Property Details | Vendors | Services

Michael Kusy Evermark Property

Edit | Add in Order to Call | ...

Related List

- Notes
- Vendor for Mainten...
- How Did we find ve... 1
- Referred Vendors
- Vendors Order to C...
- Products
- Attachments
- Purchase Orders
- Contacts
- Open Activities
- Closed Activities 1
- Work Done By Ven...
- Warranty Company...
- Vendor Technician

**Overview** | Timeline

Last Update : 01:16 PM

Email [michael.kusy@evermarkre.com](mailto:michael.kusy@evermarkre.com)

Phone [\(860\) 402-5872](tel:(860)402-5872)

Website —

Description —

**Hide Details**

**Vendor Key Info**

Vendor Name Michael Kusy Evermark Property Phone (860) 402-5872

Name of Person Spoke to — Quick Add ✓

Vendor Notes For Team Please confirm and fill complete details as this is created from Rental Applicant Realtor <https://crm.zoho.com/crm/org635091059/tab/CustomModule17/2135217000198873156> Date-Time Vendor Notes for team is Modified

Unread Chats | Channels | Contacts | Here is your Smart Chat (Ctrl+Space)

Ask Zia

- Under Vendor Key Info section: “Vendor Notes for Team” - Enter all the information that you acquired in this field.

**Vendor Key info**

Vendor Name

Name of Person Spoke to

Vendor Notes For Team 

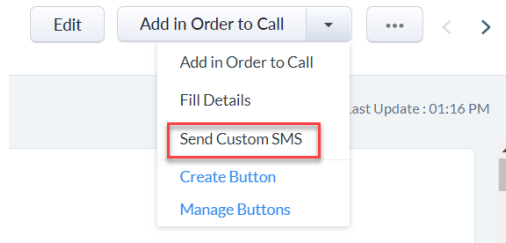
Please confirm and fill complete details as this is created from Rental Applicant Realtor <https://crm.zoho.com/crm/org635091059/tab/CustomModule17/2135217000198873156>

4. To acquire all the required information, follow the below three step process in sequence:

- [Send Custom SMS](#)
- [Scraping](#)
- [Contact vendor](#)

### Sending a Custom SMS:

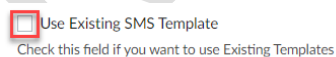
1. Select the drop down next to Add in Order to Call. Then, from the list, select Send Custom SMS button.



Send Email & SMS window appears.

A screenshot of a 'Send Email & SMS' form. At the top, there is a checkbox labeled 'Use Existing SMS Template' with the instruction 'Check this field if you want to use Existing Templates'. Below this, the form has several fields: 'Sender Email Address' (with a dropdown menu showing 'vendor@ssgrealestate.com'), 'Cc Email Address' (with an empty input field and an envelope icon), 'Sender Number' (with a dropdown menu showing '17036434598'), 'Email Subject' (with an empty input field), 'SMS Title' (with an empty input field), and 'Body Content' (with a large text area). To the right of the 'Body Content' field, there are two checkboxes: 'Add Name' and 'Add Address'. At the bottom left, there is a checkbox labeled 'Save SMS Template'. At the bottom right, there is a green button labeled 'Sent Message'.

2. Select the checkbox next to "Use Existing SMS Template".



Once you select the above checkbox, select SMS Title field will be auto-populated.

3. Select SMS Title – Select the required title from the drop down list based on the situation.

Select SMS Title	-Select-
Sender Email Address	
Sender Number	
Email Subject	
SMS Title	
Body Content	

\*\*\* Notice We have Rented \${RECORD\_ADDRESS}

Application Link Zumper rental home you called SSG Real Estate About

Business Enquiry

Business Enquiry

Business Inquiry

Business Inquiry

Once you select the SMS title, all the fields will be auto-populated as per the in-built existing template.

Select SMS Title	Application Link Zumper rental home you called SS...x	
Sender Email Address	vendor@ssgrealestate.com	Cc Email Address
Sender Number	17036434598	
Email Subject	Application Link Zumper rental home you called SSG Real Estat	
SMS Title	Application Link Zumper rental home you called SSG Real Estat	
Body Content	Hi we just spoke here is the link for the application for zumper we spoke about. Thanks The rental team. <a href="https://www.zumper.com/apply?agentId=271503">https://www.zumper.com/apply?agentId=271503</a> Rentals@ssgrealestate.com \${RECORD_ADDRESS} \${RECORD_NAME}	

☐ Add Name  
☐ Add Address

☒ Modify Selected Template

4. Click on Send Message button.

Sent Message

You will receive all the communication to [vendor@ssgrealestate.com](mailto:vendor@ssgrealestate.com).

5. Write all the received information in “Vendor Notes for Team” field.

### Scraping:

1. Search using vendor name on “Google” (example: search “Nelson Contracting Roofing Springfield VA”). All the results of vendor available in Angi, Facebook, and Yelp will be displayed. Google ratings and reviews will be found on the right side.

Google Nelson Contracting Roofing Springfield VA

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About 13,60,000 results (0.71 seconds)

<https://www.angi.com> > Springfield Roofers > **Nelson Contracting Reviews - Springfield, VA | Angi**  
 302,282 · 1,624 · 0  
 See reviews for Nelson Contracting in Springfield, VA at 5208 Dalton Rd from Angi members or join ... Category gutter repair, roofing, siding, skylights.  
 ★★★★★ Rating: 4.2 · 6 reviews

<https://www.facebook.com> · NelsonContractingVA > **Nelson Contracting Roofing Springfield VA - Facebook**  
 304,588,346 · 0 · 0 · [TITLE CHANGED]  
 Leaky Roof Repair; New roofs & Re-roofs; Flat roof specialist; gutter installation cleaning, Carpent. Page · Roofing Service. 5208 Dalton Rd, Springfield, ...

<https://www.yelp.com> > ... > Home Services > Roofing > **NELSON CONTRACTING WINDOW INSTALLATION - 10 Photos**  
 8,322,061 · 387 · 0 · [TITLE CHANGED]  
 5208 Dalton Rd. Springfield, VA 22151 ; (571) 946-2966 ; Visit Website.  
<http://www.nelsoncontractingservices.com> ; More info. Services for Nelson Contracting ...  
 ★★★★★ Rating: 3 · 2 reviews

**Nelson Contracting Window Installation**

Website Directions Save Call

5.0 ★★★★★ 20 Google reviews

Contractor in Springfield, Virginia

**Service options:** Online estimates · On-site services

**Address:** 5208 Dalton Rd, Springfield, VA 22151, United States

**Hours:** Closed · Opens 9AM Sat

**Phone:** +1 571-946-2966

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2. Make a note of the (number of reviews and ratings on Google, Anji, Yelp, and Facebook, Likes and Followers on Facebook).

Angi

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Angi / Local Reviews / Roofers / VA / Springfield / Springfield Roofers

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Enter a zip code and get matched to businesses near you.

Enter Zip Code

**Start matching**

## Nelson Contracting

Founded 1990 • With Angi since January 2013

★★★★★ 4.2 (6) Verified Reviews

### Business Details

#### Phone Number

Show phone number

#### Address

5208 Dalton Rd  
Springfield, VA 22151



View larger map

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## Nelson Contracting Window Installation

2 reviews

Claimed

Roofing, Painters, Carpenters

Edit

Closed

9:00 AM - 7:00 PM

See hours

Write a review

Add photo

Share

Save

### Photos & videos

Add photo

See all 10 photos →

<http://www.nelsoncontractingse...>

(571) 946-2966

[Get Directions](#)

5208 Dalton Rd Springfield, VA 22151

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## Nelson Contracting Roofing Springfield VA

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### Intro

Leaky Roof Repair; New roofs & Re-roofs,  
Flat roof specialist,  
gutter installation cleaning,  
Carpent

Page · Roofing Service

5208 Dalton Rd, Springfield, VA, United States, Virginia

+1 571-437-6656

Price Range · \$

Not yet rated (0 Reviews)

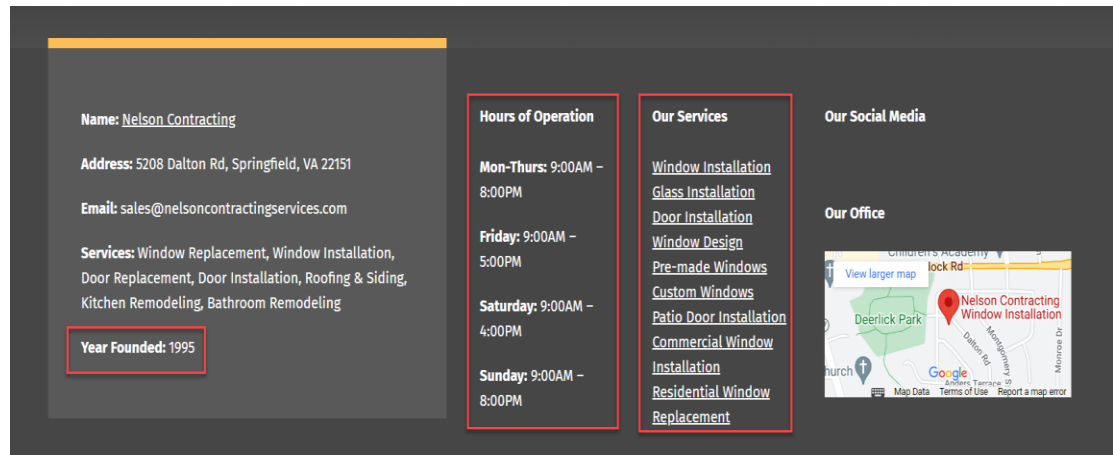
### Posts

Nelson Contracting Roofing Springfield VA

June 26, 2021 ·

[https://www.youtube.com/watch?v=\\_YDpOnxBWzY](https://www.youtube.com/watch?v=_YDpOnxBWzY)

- Find out “Areas they serve, services they offer, working hours, number of years they are in business, etc.” on their website-> About page. (Example: [nelsoncontractingservices.com](http://nelsoncontractingservices.com)).



4. Document all the collected data in “Vendor Notes for Team” field.
5. If you are unable to find any information using the above steps, try to find out using “Contact vendor” method.

### Contact vendor:

1. Click on “Call” button to call the vendor



2. During the call, gather information such as speaking person name, availability, Service call rate/hourly rate, Vendor service call pricing and info, what’s included in service call pricing, type of vendor, etc.

#### Note:

- If the vendor is unable to answer your call, try calling them again after sometime or the next day. Document all the collected data in “Vendor Notes for Team” field. (Example: Called 5 times and there is no response).
- If still there is no response, leave a voice message and gather information. If there is a response, write the gathered information in “Vendor Notes for Team”. Otherwise, write that vendor is not communicating.

### Ask Vendor Type questions

5. After acquiring all the sufficient data, judge whether the vendor is a preferred vendor or not considering all the credibility parameters:
  - Availability
  - Number of reviews
  - Average rating of 4 and above
  - Number of years in business
  - Affordable pricing
  - Communicative



- Reliability
  - Honesty
6. Fill all the gathered information in their respective fields.

*Note: Select "IS A PREFERRED VENDOR" checkbox only after carefully examining the vendor.*

Kannnam R