Vendor Details

Department Leader Documentation · https://docs.dacapoinventory.com/doc/vendor-details/

The **Vendor Details** page allows district users to manage vendors that have already been enabled for use in the district. This includes selecting a **default repair vendor** for teacher-submitted repairs, configuring **how repair notifications are emailed to vendors**, and maintaining **district-only notes** about each vendor.

This page does not create new vendors; it modifies vendor settings and district usage.

Purpose of This Page

From here, you can:

- Select a vendor currently in use by your district
- Set (or change) the **Default Repair Vendor for Teachers**
- Control whether repair emails are sent **immediately** or as a **weekly digest**
- Disable a vendor from being used in your district (without deleting the vendor record)
- Maintain **district-only notes** for internal reference
- Review repairs currently assigned to the selected vendor

Choose a Vendor to Modify

At the top of the page is a list of vendors that are marked as “in use” for your district.

Modify Vendor column

- Click a vendor name to open that vendor’s details page.
- The currently selected vendor is highlighted.

Default Repair Vendor for Teachers column

- Select the radio button to designate the vendor as the **default** repair vendor.
- This setting is used when teachers create repair requests and a vendor needs to be assigned automatically.

Best practice: Only one vendor should be set as the default repair vendor.

Modify Vendor

Once a vendor is selected, the **Modify Vendor** section becomes available.

1) Use this vendor in your School District?

This setting controls whether the vendor is available to your district.

- **Yes**: Vendor remains enabled and selectable for repairs and district workflows.
- **No**: Vendor is disabled for your district (it will not be available for selection).

This does not remove the vendor from the system; it only disables district usage.

Repair Email Delivery Settings

These settings control how (and whether) teachers' repair submissions generate emails to the vendor.

2) Send repair messages immediately or weekly?

Options include:

- **Send Emails Immediately**
  Repair emails are sent as soon as a teacher creates a repair request.
- **Weekly digest (Sunday–Saturday)**
  Repair emails are grouped and sent once per week on the selected day.

- **Do Not Send Emails To Vendor**
  No repair emails are sent to the vendor. Repair information must be communicated outside the automated email workflow.

3) What time would you like your repair messages to be sent?

- Required when a weekly digest day is selected.
- Not required for “Send Emails Immediately” or “Do Not Send Emails To Vendor.”

Note: If you choose a weekly digest day, you should select a time to ensure consistent vendor communication.

Vendor Contact Information

Vendor contact fields are displayed for reference and are read-only on this page:

- Vendor name
- Address, city, state, zip
- Phone 1 / Phone 2
- Email (and optional Email 2)

If changes are needed to the vendor’s contact information, they must be updated through your vendor management process (depending on your district’s permissions/workflow).

District Notes

District Notes are editable and visible **only to your district**.

Use this field to record information such as:

- Preferred contact methods
- Account numbers or internal references
- Pickup/drop-off expectations
- Historical issues or service notes

- Billing/PO reminders

These notes do not appear to teachers or other districts.

Update Vendor

Click **Update Vendor** to save:

- District vendor usage (Yes/No)
- Repair email schedule settings
- District notes
- Any applicable district-level settings shown on the form

Current Repairs At Vendor

The **Current Repairs At Vendor** section lists active repairs assigned to the selected vendor, including:

- Instrument and case number
- Building and teacher
- Serial number
- Date sent
- Current repair status
- **Manage Repair** action link

Use **Manage Repair** to open the repair record and update status, details, and communication as needed.

Common Workflows

Set the default repair vendor

1. Find the vendor in the list.
2. Select the radio button under **Default Repair Vendor for Teachers**.
3. The setting saves via the form submission.

Switch from immediate emails to a weekly digest

1. Select the vendor.
2. Choose a weekly day under the repair message schedule.
3. Select a time.
4. Click **Update Vendor**.

Disable a vendor (stop using in district)

1. Select the vendor.
2. Set “Use this vendor in your School District?” to **No**.
3. Click **Update Vendor**.
