

Accessing and Maintaining Conference Vendors Procedure

Vendor Categories

There are now 2 vendor categories for housing vendors. **Housing** and **Housing – Conference**. Housing has not changed; continue to use it the way you are currently using it. Housing – Conference (newly added) represents the vendors your Treasurer or Conference administrator has add for your specific conference and is located in the Vendor Category drop down box when you are requesting a check or pledge.

Accessing Conference Vendors

Case Workers:

- Select Housing-Conference from the Vendor Category
- Click the Conference Vendor drop-down
 - If the vendor is listed, click the vendor name then click Next
 - If the vendor is not listed in the pull-down, check the Other Vendor box and add the address and click Next

Maintaining Conference Vendors

Treasurer/Officers/Conference Administrator:

You have access to 2 new tabs on the conference page: **New Vendors** and **Vendors**. Caseworkers will still have the ability to enter a vendor (name, address, etc.), not listed in the Housing – Conference drop down list. By doing so, the request will be added to the New Vendor list, the New Vendor list should be review by the treasurer, a conference officer, or conference administrator at least monthly

- From My Conference, click the “New Vendor” tab and review the members in the temporary list
 - If the vendor(s) should be kept, click the vendor and then the “Add” button, vendor will be added to the Vendors list for your conference
 - If just a temporary address, for example, one-time private landlord, click the “Dismiss” button

The “New Vendors” tab list is a temporary holding of all the housing vendors used by our conference. The “Vendor” Tab contains the vendors you have added. New vendors not Dismissed within 30 days, will be deleted from the New Vendors list.

- Vendors may be added directly by clicking the “**Add**” button on the “Vendor” tab
- Vendors may be deleted by clicking the vendor then the “**Delete**” button
- Vendors information may be changed by clicking the vendor, making the change and clicking the “**Save**” button