Vendor Portal Quick Reference

The purpose of this document is to serve as a reference for how to register & utilize some of the basic functions of the USM Vendor Portal. For Vendor Portal tasks not described in this document, please direct all questions to your account representative at 1-800-355-4000 or a USM Vendor Portal representative at vendorportalhelpdesk@usmservices.com.

Registration and Login

1. **Registration**

   Prior to logging onto the Vendor Portal for the first time, a USM representative will create your user profile in the USM internal operations system. Once your user profile has been created, you will need to "register" yourself on the Vendor Portal using the email address to which the notification was sent.

   To "register" yourself follow the steps below:

   Option 1 – Registering utilizing auto-generated email

   1. After procurement creates your user profile, you will receive an auto-generated email from info@usmservices.com
   2. This email will be titled "USM Web Portal – Thank you for registering" and include a link to login "Login now:"
   3. Email will also include your User ID and Initial Password
   4. Select "Login now:" link and you will be directed via web browser to Vendor Web Portal Change Password
   5. Enter your Initial Password contained in registration email in "Password" field
   6. Choose a new password and enter in "New Password" field
   7. Reenter new password in "Confirm New Password" field.
   8. Select "Change Password".
   9. You will have completed registration and be logged into the vendor portal.

USM
An EMCOR Company

USM Vendor Web Portal - Thank you for registering

info@usmservices.com
To███████████
Retention Policy 18 Month Delete Inbox (1 year, 6 months)   Expires 10/10/2026

Welcome to the Vendor Portal!

Hello ███████████

You are receiving this email because you recently registered as a new user. Your User ID and initial password are listed below. Yo[u] before you can start using the web portal. To set your password and access your account, please click the link below:

Login now:
https://vendorqa.usmservices.com/Pilot/Verify.aspx?ID=29112&Digest=dDHtvLUtokg6YJcecHJyhg

Please note that the link listed below is only valid for initial verification.

User ID: ███████████
Initial Password: ████████

Thank you!

USM Procurement

If you have any problems verifying your account, please send an email to: vendorportalhelpdesk@emcor.net, to get assistance.

Vendor Web Portal Change Password

Please change your password...

Since this is your first login attempt you are required to change your password.

Please choose a password that is easy to remember but complex enough to remain secure. We recommend a password which includes a mix of alpha, numeric and special characters with a length of at least 6.

Note that passwords are case-sensitive, so if you use a mix of upper-case and Lower-case characters they must always be entered this way.

User ID: ███████████
Password: [   ]
New Password: [   ]
Confirm New Password: [   ]

[Change Password]   [Cancel]

Option 2 – Registering utilizing Vendor Portal

1. After procurement creates your user profile, you can choose to register utilizing the Vendor Portal – go to https://vendor.usmservices.com
2. Select "First time logging in? Click Here".
3. Enter your email address, then select the "I agree to the Terms of Use below" checkbox. Click "Register Now".
4. You will receive an email from notify@usmservices.com
5. Email will also include your user ID and initial Password
6. Select "Login now:" link and you will be directed via web browser to Vendor Web Portal Change Password
7. Enter your Initial Password contained in registration email in "Password" field
8. Choose a new password in "Confirm New Password" field.
9. Reenter new password in "Confirm New Password" field.
10. Select "Change Password".
11. You will have completed registration and be logged into the vendor portal.

Vendor Portal Login

Please enter your login information...

Email Address: [_____] *
Password: [_____] *

☐ I agree to the Terms of Use below.
[Submit] [Reset]

If you have difficulty logging on to the Vendor Portal, please contact USM at vendorportalhelpdesk@emcor.net or 800.355.4000.

First time logging in? Click here

Forgot your password? Click here

For Help (English & Spanish) Click here

Privacy Policy

TERMS OF USE

Client Login Registration

Please enter the following information:

Email Address: [   ] *

☑ I agree to the Terms of Use below.

For Help Click here

[Register Now]   [Cancel]

TERMS OF USE

Client Login Registration

You have successfully registered. Your initial password was sent to the email address you used to register.

To complete the registration process you must first open the email and click on the verification link provided.

TERMS OF USE

Login

You will only need to "register" once. After you've registered, you will be able to log on to the Vendor Portal at any time.

To "login" to the Vendor Portal, follow the steps below:

1. Go to https://vendor.usmservices.com
2. Enter your email address and password, then select the "*I agree to the terms of use below*" checkbox
3. Once you click the "*Submit*" button, you'll be logged onto the portal.

Vendor Portal Login

Please enter your login information...

Email Address: [_____] *

Password: [_____] *

☐ I agree to the Terms of Use below.

[Submit] [Reset]

If you have difficulty logging on to the Vendor Portal, please contact USM at vendorportalhelpdesk@emcor.net or 800.355.4000.

First time logging in? Click here

Forgot your password? Click here

For Help (English & Spanish) Click here
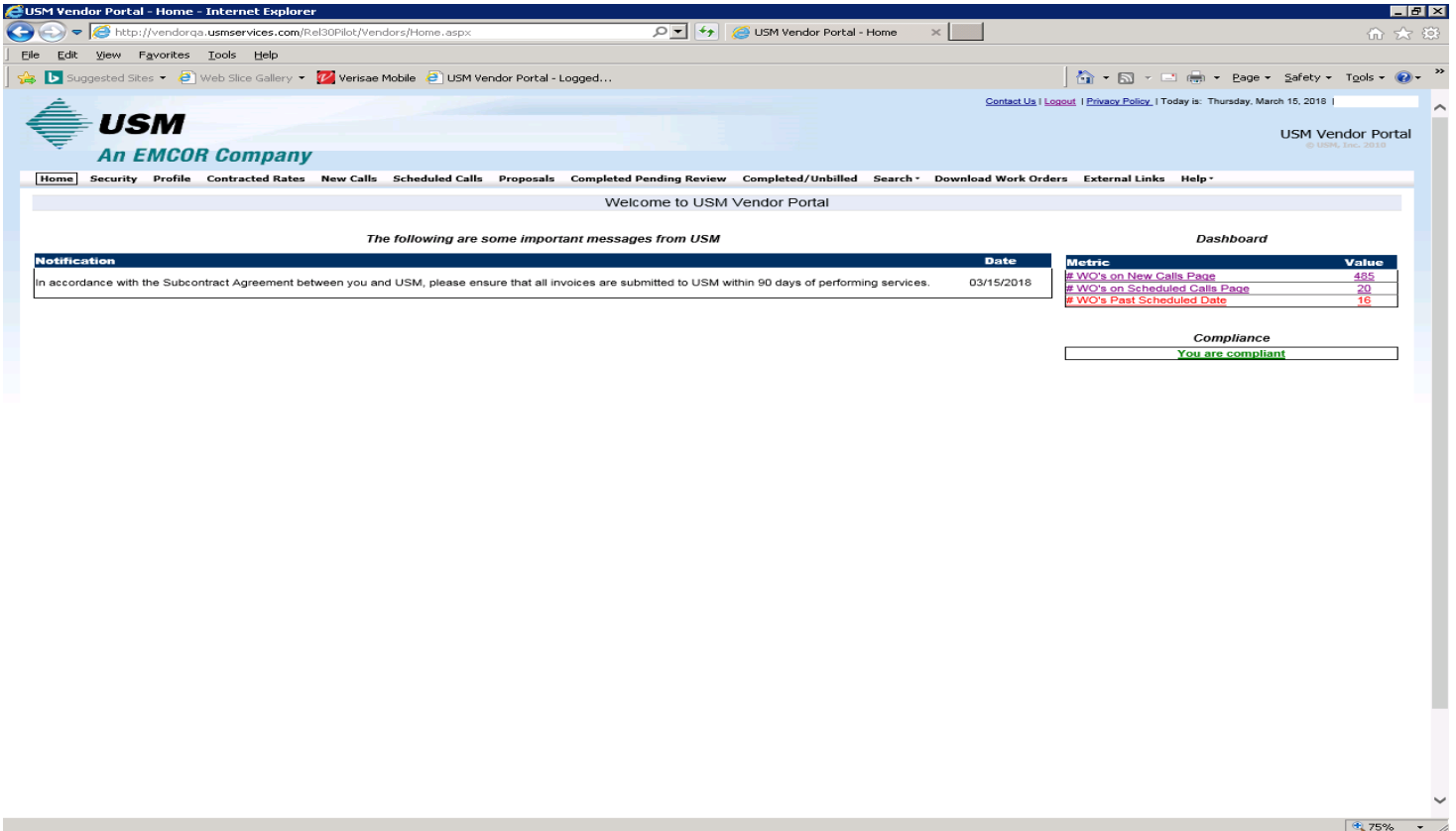
Privacy Policy

TERMS OF USE

Home Screen

This is the initial screen you will see after you log in. It contains a dashboard with links to your various call pages, your overall compliance status, and a notification section displaying important messages from USM. Click on the links to navigate to the desired areas.

The navigation menu runs across the top of the Vendor Portal pages. The navigation menu contains several links which will allow you to perform work order functions and review work order data association with your company.
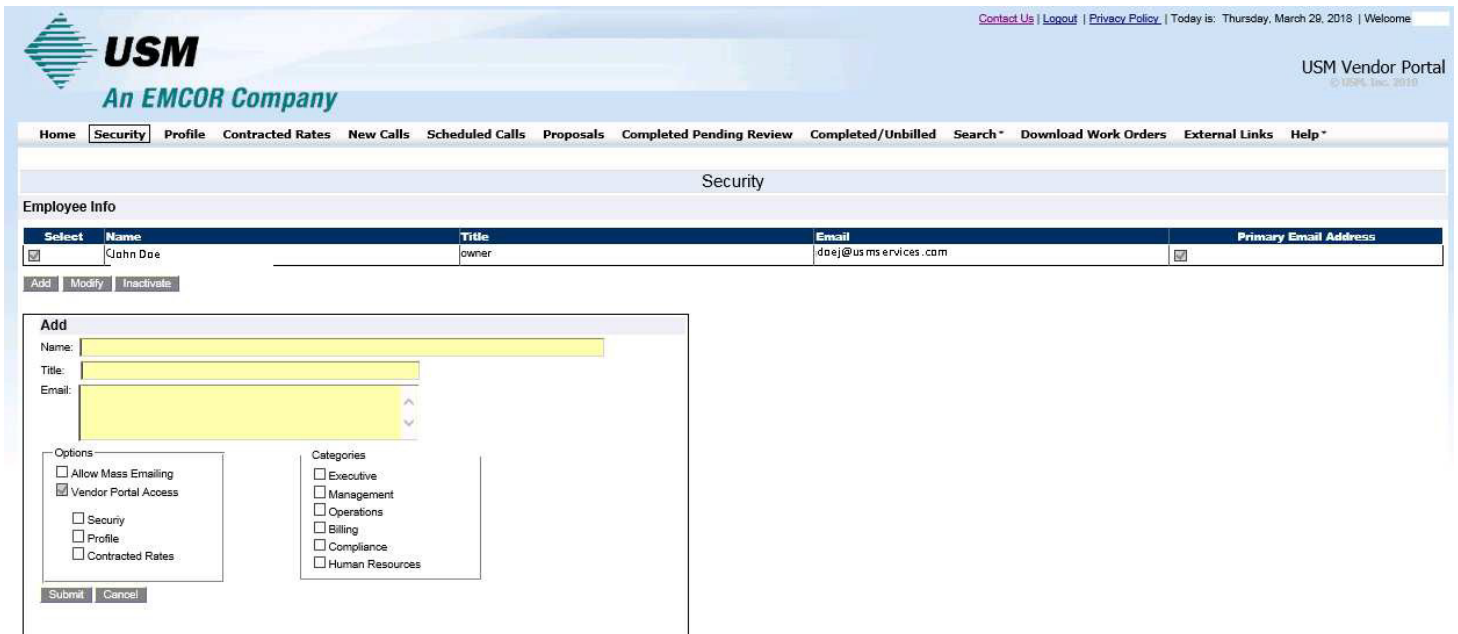
Security

You can manage (add, remove or modify) users to your portal. This functionality is available on the "Security" page of the Vendor Portal**.** This feature provides the primary email holder the ability to manage the access of their users. You can make certain information available to each user or alternatively hide certain information from each user for certain pages such as the Security, Profile and the Contracted Rates Page.

To add a user to your profile, click on the "Security" page and select "Add". Enter the name of the user, their title and email address. Under "Options" select the security access you would like to grant the user. Under "Categories" select their department type and select "Submit". You can also "modify" and 'inactivate' a user and their security access on this page.

Profile

The Profile page displays your company contact and compliance information. Any insurance, employee, or license (if applicable) information that is set to expire within 30 days will be highlighted in purple. Expired information will appear in red. Click on one of the available links applicable to the respective document for more detailed information regarding their status. If any information is listed incorrectly, please contact the USM Compliance department to update your information.

You can also manage your employee information through the "Profile" page.

To change employee information, click on the link labeled "Employee List".
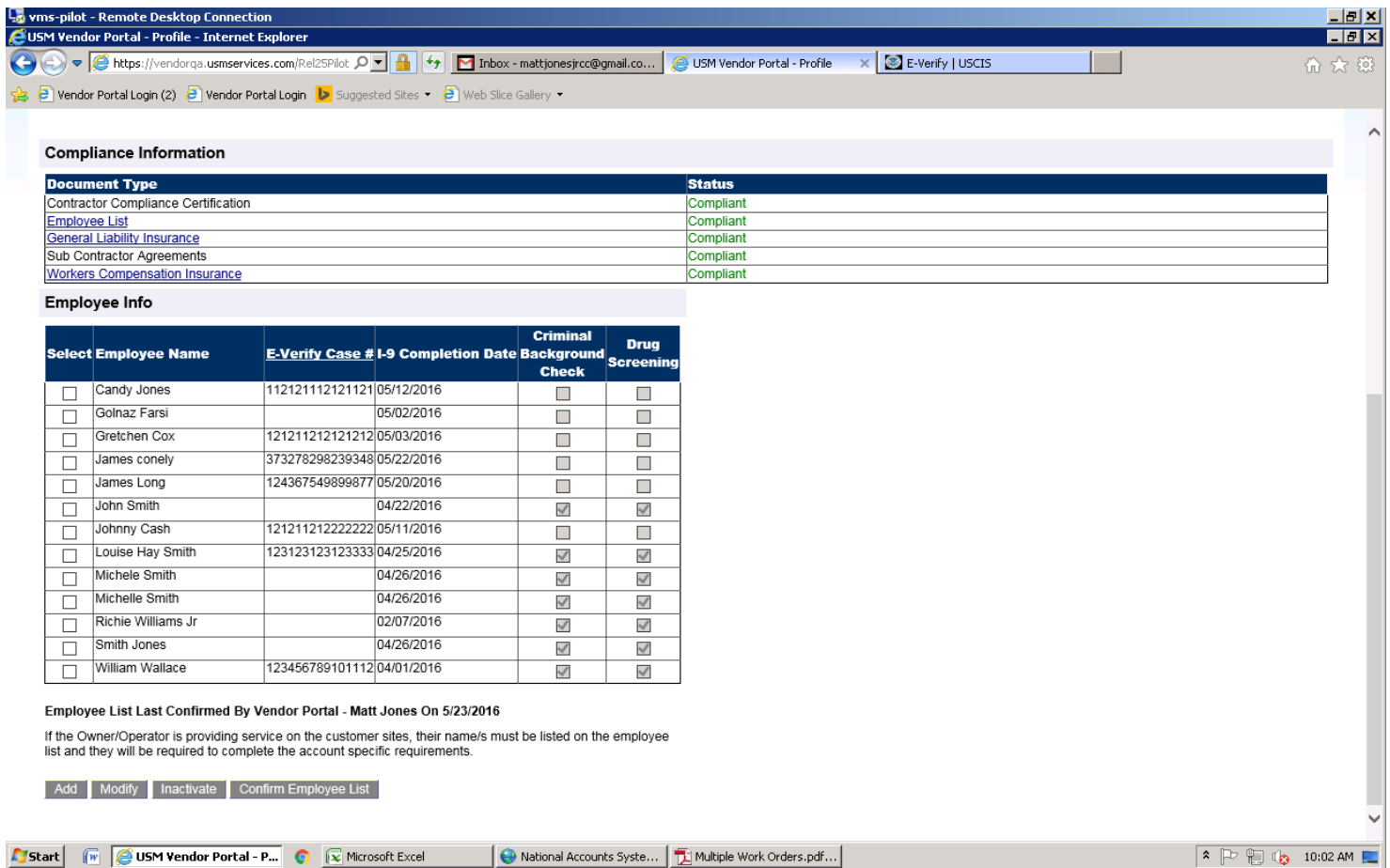
Your employee information will populate below under "Employee Info". To add an employee, click on "Add" and enter the required information (First Name, Last Name, and I9 Completion Date). The E-Verify Case # is required for any newly hired employees. You must register for E-Verify at https://www.uscis.gov/e-verify and obtain the E-Verify Case # for the new employee within 3 days of hire.

To "Modify" the name of an existing employee, select the employee and click on "Modify". Change their name and select "Submit".

To inactivate an existing employee, select the employee and click on "Inactivate". The system will prompt you to confirm that you would like to inactivate the selected employee. Select "OK".

To confirm all changes to your employee list or to submit the current employee list select "Confirm Employee List".

Please make sure that you "Confirm Employee List" anytime that a change is made in order for the portal to update and track the changes.

Contracted Rates

The Contracted Rates page displays all current payment rates associated with your company that USM has on file. If any information is listed incorrectly, please contact the USM Procurement department to update your information.
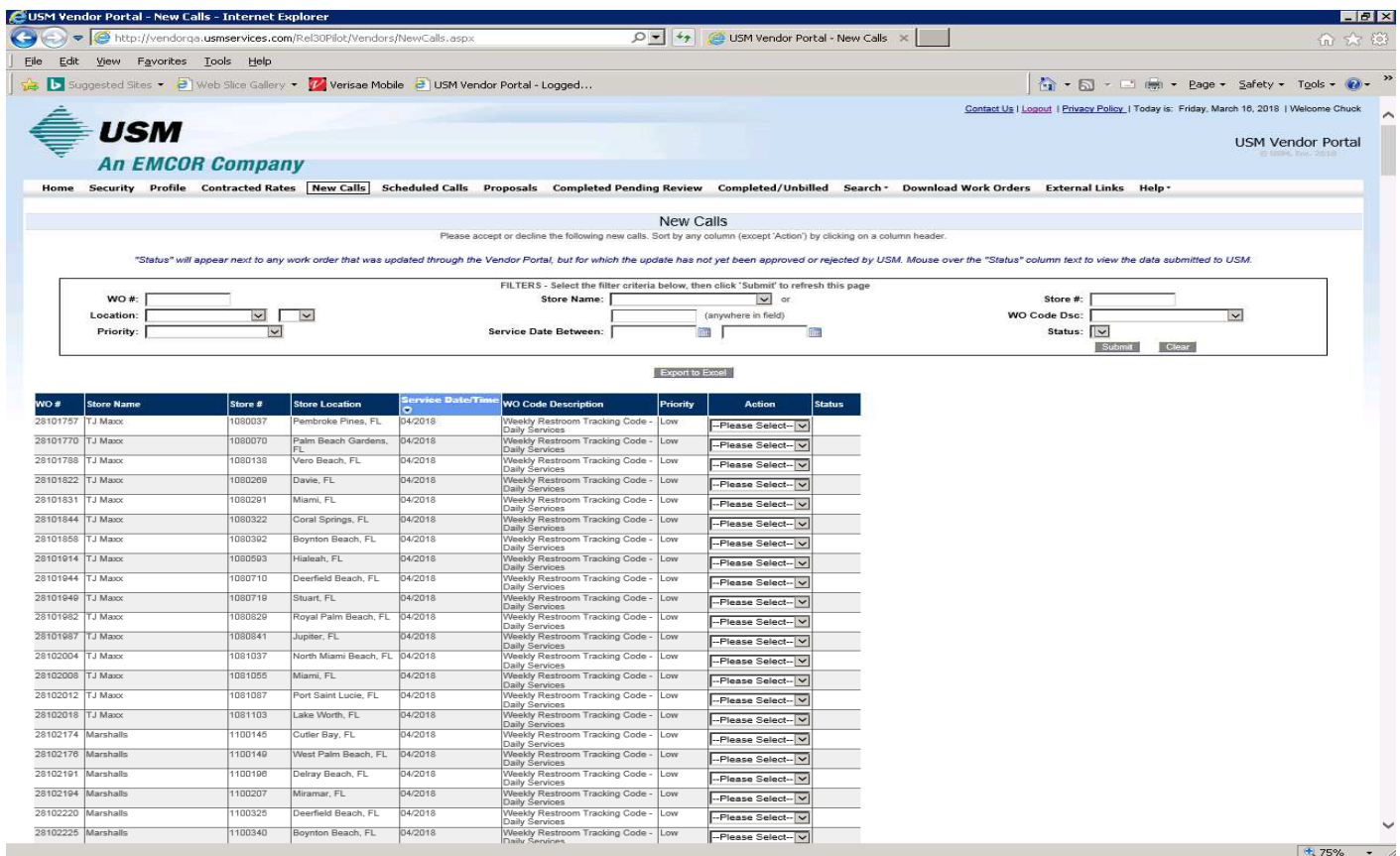
New Calls

The New Calls page lists any work order that has been assigned to your company but you have not yet "Accepted" (i.e. you have not yet provided a date that you can perform the service). You will receive an automated email notifying you that you have been assigned a new service call to acccept.

To accept a call, use the drop down list on the right side of the page and select the "Accept" option. Once selected, you will be navigated to a page where you can provide a service date and time.

After you provide a service date, the work order will go into a "pending" state and will remain on the New Calls page with a note describing the action you have taken. The work order will remain in this pending state until a USM service representative "approves" your update in the USM internal operating system.

Once your update is approved, the work order will move to the "Scheduled Calls" page of the Vendor Portal.

Scheduled Calls

The Scheduled Calls page lists any work order that has been assigned to your company but has not yet been "Completed" (i.e. you have not yet provided completion details). This screen is used to check-in to calls, reschedule calls, or complete calls. This will allow your company to manage the work orders through USM.

Completing a Call

To complete a call, use the drop down list on the right side of the page and select the "Complete" option. Once selected, you will be navigated to a page where you can provide completion details. While providing completion details, you MUST include information related to the member of store management who signed off on completion of the work.

As part of the completion process you will be required to validate the asset that has been associated with the work for which you have completed. If the incorrect asset is assigned to the work order, you are required to select the correct asset to ensure accuracy of the asset data being collected. Once you have confirmed the asset you MUST complete the Failure Code section of the completion page. You are required to select from the predefined drop down menu any problems, the cause and remedy types that align to the issues you have found and the action you have taken. These selections should be supported with additional comments in the completion details section of the completion page.
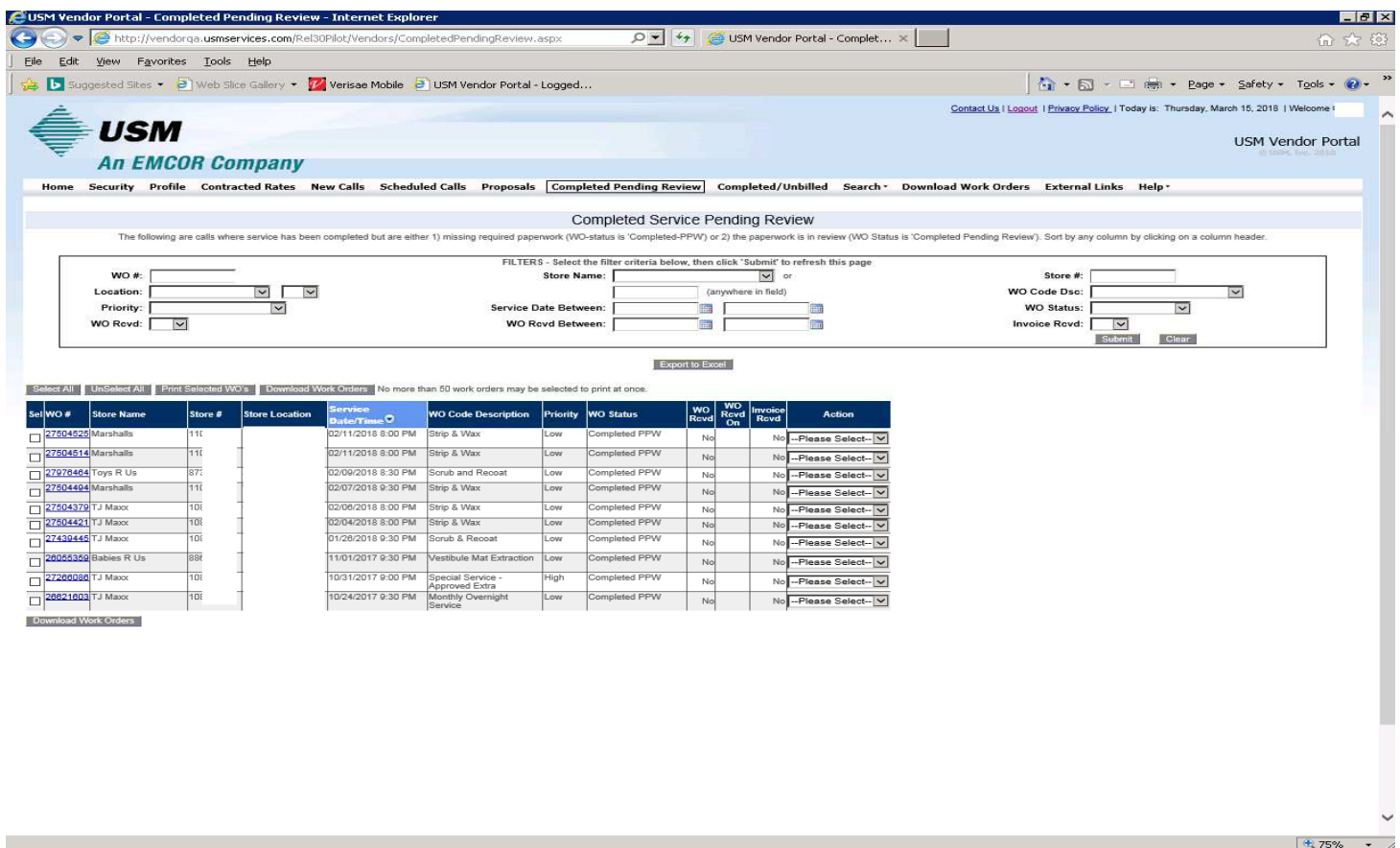
After you provide completion details, the work order will go into a "pending" state and will remain on the Scheduled Calls page with a note describing the action you have taken.
The work order will remain in this pending state until a USM service representative approves your update in the USM internal operating system.

Once your update is approved, the work order will move to the "Completed Pending Review" page of the Vendor Portal.

Completed Pending Review

The Completed Pending Review page lists any work order that has been assigned to your company which has been completed and USM has received, but not yet validated, the paperwork. You can view details of each individual work order by clicking on the Work Order number or select View/Print under the Action column.

Completed/Unbilled

The Completed/Unbilled page lists work orders assigned to your company where service has been completed and validation requirements have been met but payment has not been processed.
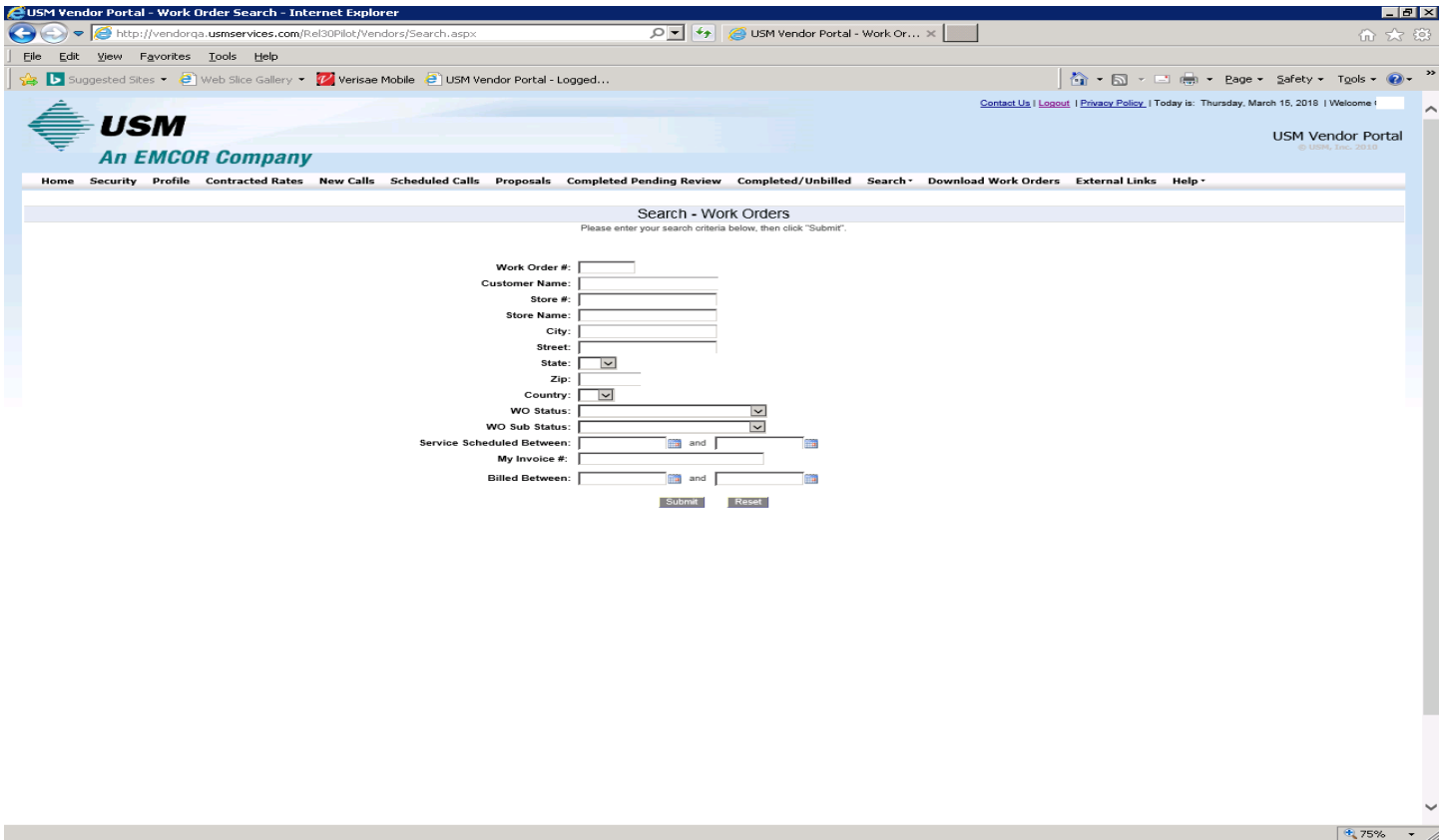

Printing Work Orders

On the Scheduled Calls or the Completed Pending Review page, select "Print" from the drop down menu under the Action column to print a work order. You also have the option to print multiple work orders simultaneously by selecting the desired documents and clicking the "Print Selected WO's" button. *Note that the "Print" option is only available once work has been accepted & scheduled or completed.*

Once you select "Print", you will receive a message saying that the Work Order has been submitted for printing. In order to see the work order, you must click on the "Download Printed Work Orders" link at the top or bottom of the grid on Scheduled Calls or Completed Pending Review pages.

Once you click on the "Download Printed Work Orders" link, you will be navigated to the Download Printed Item screen. Here you can click on a Work Order Number to open the printed work order in PDF format and print it as necessary.

Search

The search page can be used to locate specific work orders through a number of fields of search criteria. You can enter a single value or multiple values to the search fields to refine your search.