[Give vendors access](#) to the Vendor portal so they can view work order details, upload invoices, add notes/photos, and mark their work as done directly on the work order. All of the actions a vendor completes on the work order through the Vendor Portal are reflected directly on the work order.

Tip

[Share this overview](#) with your vendors so they can learn how to use the Vendor Portal. This is also available to them when they click their **name** at the top right of the Vendor Portal.

Use Case: You recently added a new vendor to your database and need to enable their portal to communicate about the work order.

In This Article:

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- [Adding Invoices](#)
- [Scheduling with Tenant's Preferred Times](#)
- [Vendor Rescheduling](#)
- [Vendor/Tenant Text Communications](#)

Navigating the Vendor Portal

- Work orders are sorted by **Status**. Vendors can click the tabs at the top of the page to view all work orders assigned to them from any AppFolio database:

  - **Estimates** - On a work order, a vendor can click **Estimated** and select to move the work order to the **Estimated** tab.

  - **In Progress** - Work orders populate on this tab by default. A vendor can move a work order from the **Estimated** tab to the **In Progress** tab

  - **Completed** - Work orders that you have marked as **Work Done** on your end will appear on this tab. Vendors can see a **Payment Pending** flag when a work order bill has been created in your database and **Payment Sent** when the bill has been marked as paid.
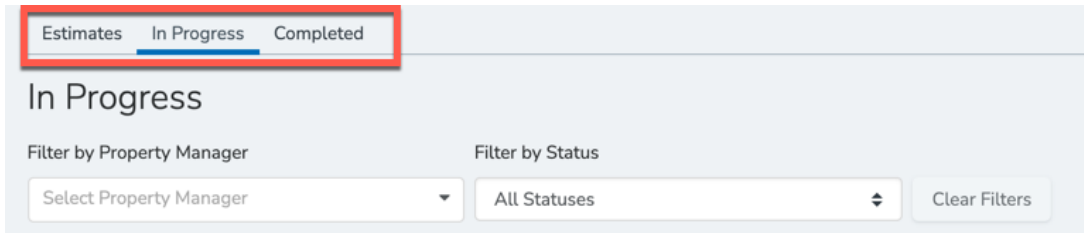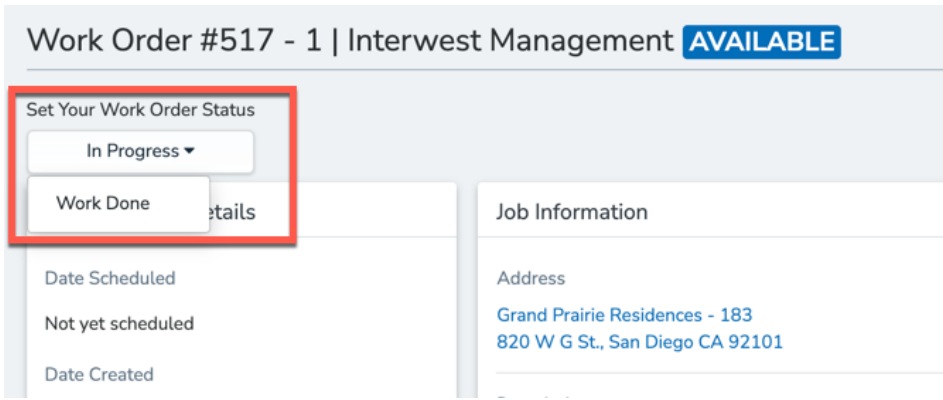

- Vendors can search for a work order by typing either the **address** or **work order number** into the search bar.
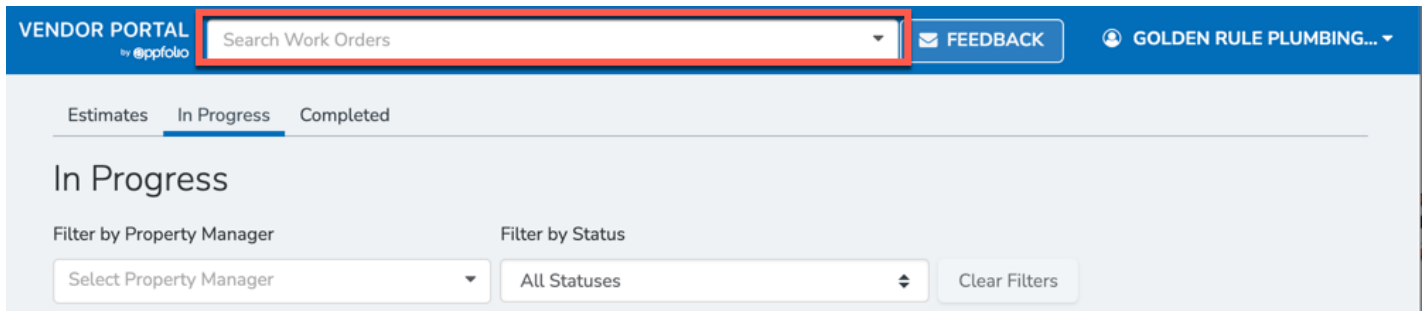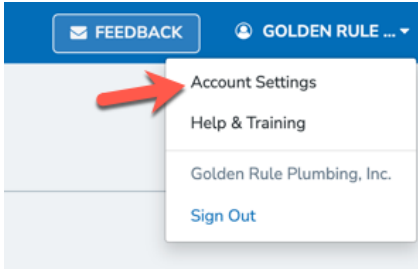

- On the work order, a vendor can add notes & photos, upload invoices, and mark the work as done.
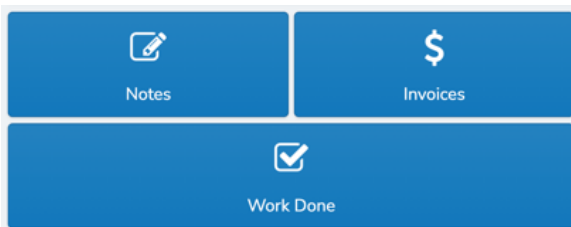
- At the top of the work order, vendors can toggle the work order status between **In Progress** and **Work Done**.

- On the **Account Settings** page, vendors can update their contact information and view their insurance expiration information on file.
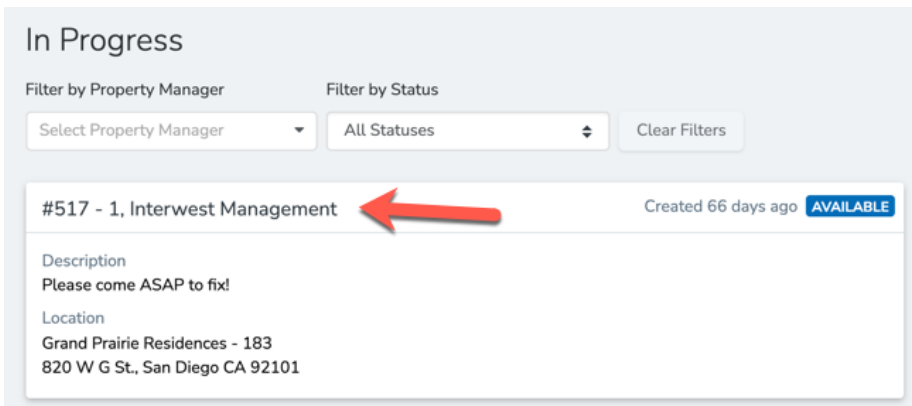

Adding Notes & Photos

Vendors can add notes and upload multiple photos at once in the Vendor Portal. You will be notified via email when a vendor uploads photos.
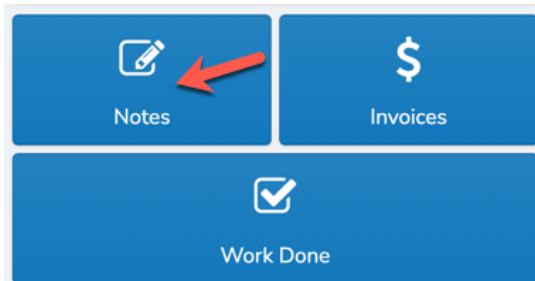
Note

Vendors can edit their notes until they mark the work order as **Work Done** or until the you mark the work order **Job Done**.
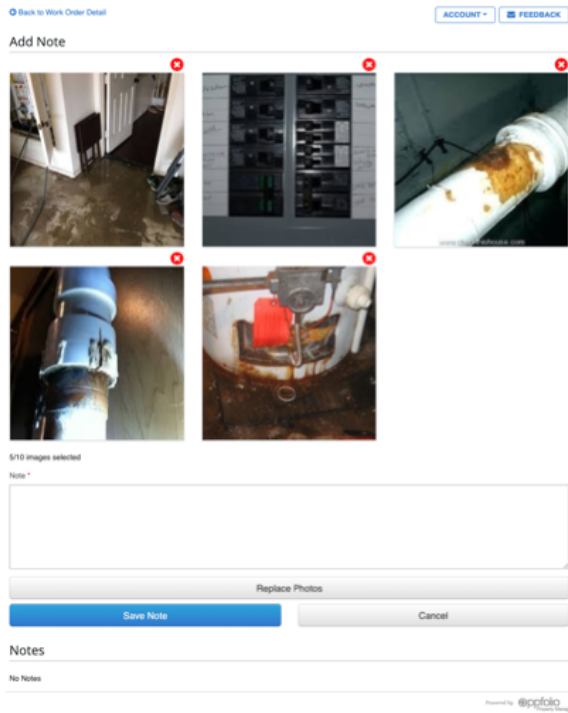
1. Once logged in, the vendor can click into the work order in question.

2. At the bottom of the work order details, the vendor can click **Notes**.

3. The vendor can add any text notes to the work order, and/or click **Add Photos to this Note**.

4. When done, the vendor can click **Save Note**.

Adding Invoices

Vendors can upload invoices or they can provide details to generate an invoice. The invoice details will be saved as a PDF on your work order and included in the Attachments section at bottom of the work order in AppFolio. If you have enabled the notification setting for your profile and are tracking the work order, you will be notified via email and/or mobile push when a vendor adds invoice details.
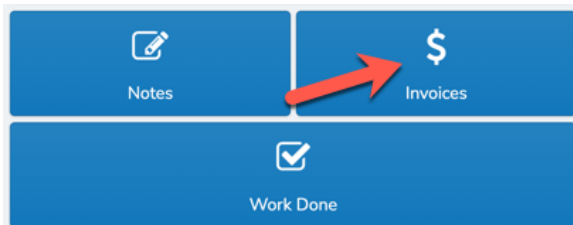
Note

Vendors can edit their invoices until they mark the work order as **Work Done**.

1. Once logged in, the vendor can click into the work order in question.
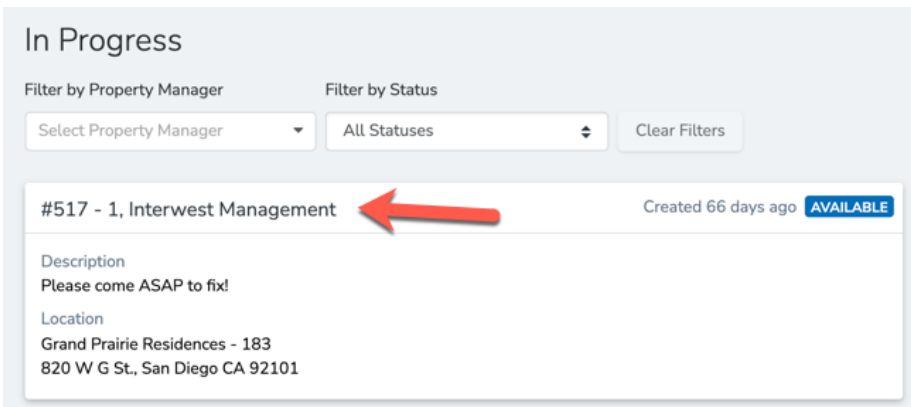
2. At the bottom of the work order details, the vendor can click **Invoices**.

3. If the vendor clicks the **Create Invoice** button, they can provide the following invoice details:
   - **Description** - This is an optional statement description of the work done.

- **Quantity** - If the invoice line item has a quantity associated with is (such as parts ordered) the vendor can note that here.

- **Rate** (required) - The billable rate from the vendor. If a quantity is entered, the rate will be multiplied by the quantity for the total.

4. Alternatively, the vendor can click **Upload Invoices** to upload a copy of an already existing invoice for the work.

5. When done, the vendor can click **Submit Invoice.** The invoice details will be saved as a PDF in the **Attachments** section of the work order and you will be notified via email.

Scheduling with Tenant's Preferred Times

If a tenant submits preferred times for their work order in the Online Portal, these options will be available for the vendor to review after they have accepted the work order.

1. Once the vendor accepts the work order, they can view the **Tenant Preferred Schedule**.
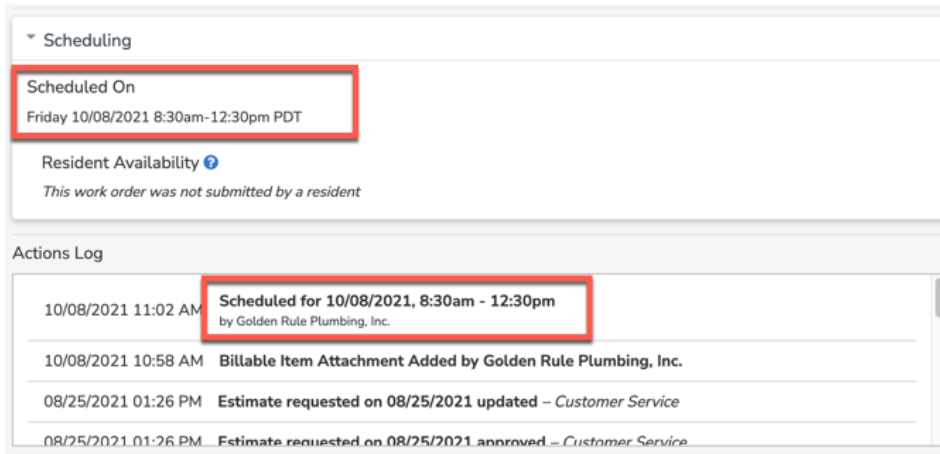

2. The vendor can select the time that works best for them or work with the tenant for alternative times:

- **Vendor Schedules Job** - Once scheduled, the tenant will receive an email notification, the work order will update to scheduled, the **Scheduling** block will update with the selected time, and the audit log of the work order will be updated with the scheduled time.


- **No Times Work** - If no times work, the vendor can select **No Times Work** and reach out to the tenant directly to schedule or reach out to you.

Vendor Rescheduling

If a scheduled work order needs to be rescheduled, the vendor can make this change from within their Vendor Portal.

Vendor Portal View

1. On the dashboard of Vendor Portal, the vendor will select **Reschedule** from the Schedule block.
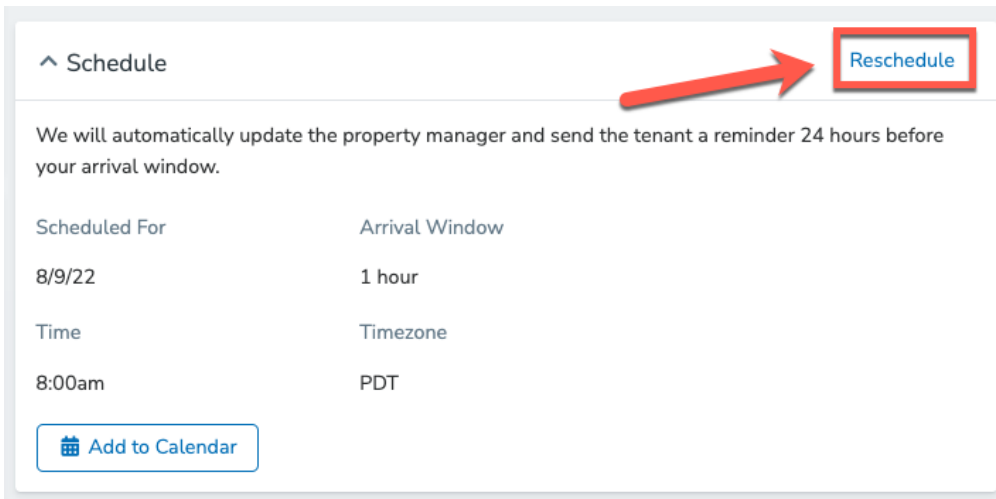
2. Fields will appear that will allow the vendor to enter a new time, date, arrival window, and reasons for rescheduling

3. After the vendor clicks **Reschedule Job**, you and the tenant will receive a confirmation email notifying you that the vendor has rescheduled the work order.


Vendor/Tenant Text Communications

The Vendor Portal allows vendors to opt in to receive a temporary SMS number to contact tenants regarding current work orders.

Caution

Vendors can **only** text tenants through the Vendor Portal if they are logged into their portal on a device that supports SMS texting. For example, vendors who use Apple products (iPhone, iPad, iMac) that have SMS texting integrated can use this feature. While, non-Apple products that do not support SMS texting cannot text tenants.

1. Once logged in, vendors can click into the desired work order.
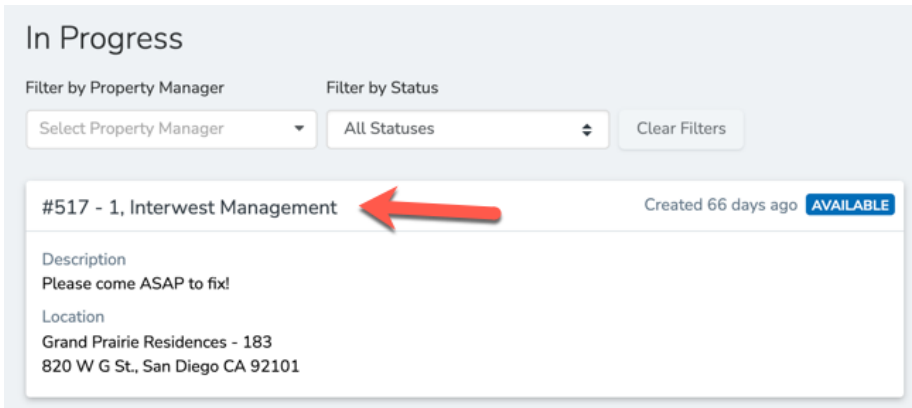
2. Vendors will then locate the **Tenant** section on the work order and enter their personal phone number in the **Verify Your Number** field. Finalize by clicking the blue **Verify** button.
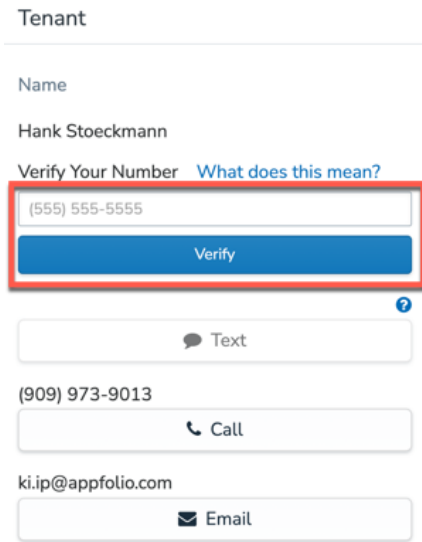
3. Once verified, the vendor will be given a temporary SMS number. The benefits of generating a temporary SMS number for work orders are as follows:

   - They expire after 30 days

   - They protect both vendor and tenant privacy

   - The texts between tenant and vendor can be seen on the work order page

4. When the vendor sends a text to the tenant, AppFolio also sends a disclaimer stating that the text conversation is being recorded.
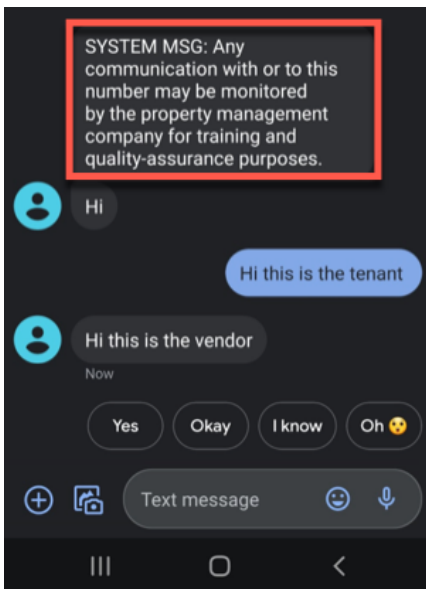
5. AppFolio users can view all text messages sent between the vendor and the tenant in the **Texts** section of the **Work Order** page on their database.