#### 9/20/23, 9:14 AM

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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:

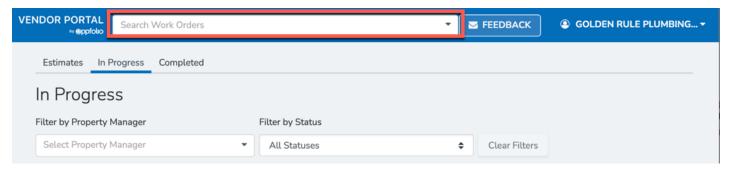
- <u>Navigating the Vendor Portal</u>
- <u>Adding Notes & Photos</u>
- <u>Adding Invoices</u>
- <u>Scheduling with Tenant's Preferred Times</u>
- Vendor Rescheduling
- <u>Vendor/Tenant Text Communications</u>

### 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.

Estimates In Progress	Completed		
Progress			
Filter by Property Manager		Filter by Status	
Select Property Manager		<ul> <li>All Statuses</li> </ul>	÷

• 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.

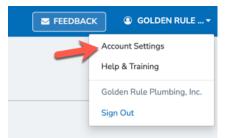


• At the top of the work order, vendors can toggle the work order status between In Progress and Work Done.

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Work Order #517 - 1   Interwes	t Management AVAILABLE
Set Your Work Order Status	
Work Done stails	Job Information
Date Scheduled Not yet scheduled	Address Grand Prairie Residences - 183
Date Created	820 W G St., San Diego CA 92101

• 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.

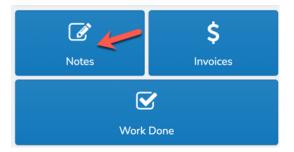
#### Note

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.

In Progress		
Filter by Property Manager	Filter by Status	
Select Property Manager	All Statuses	\$ Clear Filters
#517 - 1, Interwest Manageme	ent 🔶	Created 66 days ago <b>AVAILABLE</b>
Description Please come ASAP to fix!		
Location Grand Prairie Residences - 183 820 W G St., San Diego CA 92101		

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.

O Back to Work Order Detai

Add Note					
				17	
/10 images selected					
		Replace P	holos		
	Save Note			Cancel	
Notes					
io Notes					//w @ppfolo

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.

In Progress		
Filter by Property Manager	Filter by Status	
Select Property Manager	<ul> <li>All Statuses</li> </ul>	♦ Clear Filters
#517 - 1, Interwest Manage	ement	Created 66 days ago <b>AVAILABLE</b>
Please come ASAP to fix! Location		
Grand Prairie Residences - 183 820 W G St., San Diego CA 9210	1	

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

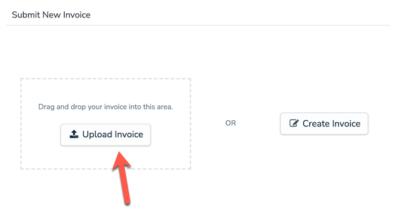


- 3. If the vendor clicks the **Create Invoice** button, they can provide the following invoice details:
  - Description This is an optional statement description of the work done.

- 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.

Description Restroom is flooding. Toilet leak that is uncontainable. Unable to shut off water.	Tenant Hank Stoeckmann		d Prairie Residences W G St., San Diego (	
Submit New Invoice				
An and a blance	O	Rate *	Amount	
Jescription	Quantity	Rate	Amount	
Materials/Hours	Quantity 1	\$ 0.00	\$0.00	•
Description Materials/Hours	1			•

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.

▼Tenant Preferred S	chedule
The tenant submitted preferred times for available for any of these times? If not, text or call the tenant to schedule.	
<ul> <li>Wednesday 8/4/21: 10:00am - 3</li> <li>Thursday 8/5/21: 8:00am - 12:0</li> <li>Friday 8/6/21: 10:00am - 2:00pt</li> </ul>	00pm PDT
Schedule Job	No Times Work

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

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• 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.

* Scheduling	
Scheduled On Friday 10/08/2021 8:30am-	-12:30pm PDT
Resident Availability	
Actions Log	
10/08/2021 11:02 AM	Scheduled for 10/08/2021, 8:30am - 12:30pm by Golden Rule Plumbing. Inc.
10/08/2021 10:58 AM	Billable Item Attachment Added by Golden Rule Plumbing, Inc.
08/25/2021 01:26 PM	Estimate requested on 08/25/2021 updated – Customer Service
08/25/2021 01·26 PM	Estimate requested on 08/25/2021 approved - Customer Service

• 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.

^ Schedule	Reschedule
We will automatically update the your arrival window.	property manager and send the tenant a reminder 24 hours before
Scheduled For	Arrival Window
8/9/22	1 hour
Time	Timezone
8:00am	PDT
Add to Calendar	

2. Fields will appear that will allow the vendor to enter a new time, date, arrival window, and reasons for rescheduling

∧ Schedule	F	Reschedule
, ,	the tenant, please enter the date and time below. When e perty manager and send the tenant a reminder 24 hours b 8:00am - 9:00am.	
Scheduled For *	Arrival Window *	
8/17/2022	1 hour 🗸	
Time *	Timezone	
8:00 AM × (1)	PDT	
Reason for Reschedule This response will be visible to both the second s	the property manager and the resident. PM has requested additional work then	
	37 / 80	
Reschedule Jo	b Cancel	

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.

	A vendor rescheduled WO #4-1 Inbox ×			•	Ø
A	Southwest Property Management to joshua.figueroa+1 👻	9:52 AM (4 minutes ago)	☆	¢	:
	appfolio Property Manager				

B & W Roofing and Gutters has rescheduled work order #4-1 in Vendor Portal. Scheduling conflict; "PM has requested additional work then"

### Details

Vendor: B & W Roofing and Gutters Property: Demo Property Tenants: Baron Adams, Luciano Punk

## 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.

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er by Property Manager	Filter by Status	
Select Property Manager	✓ All Statuses	♦ Clear Filters
#517 - 1, Interwest Manag	gement	Created 66 days ago
Description Please come ASAP to fix!		

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.

Tenant
Name
Hank Stoeckmann
Verify Your Number What does this mean?
(555) 555-5555
Verify
P Text
🗩 Text
(909) 973-9013

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.

	SYSTEM MSG: Any communication with or to this number may be monitored by the property management company for training and quality-assurance purposes.	
8	н	
	Hi this is the tenant	)
8	Hi this is the vendor Now	
	Yes Okay I know Oh 😔	
$\oplus$	🌈 Text message 😳 🌵	
	III O <	

# 9/20/23, 9:14 AM

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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.

