

Vendor Portal Guide

AppFolio Vendor Portal helps you view all of your work orders, communicate easily with your clients, and track your payments.

Table of Contents

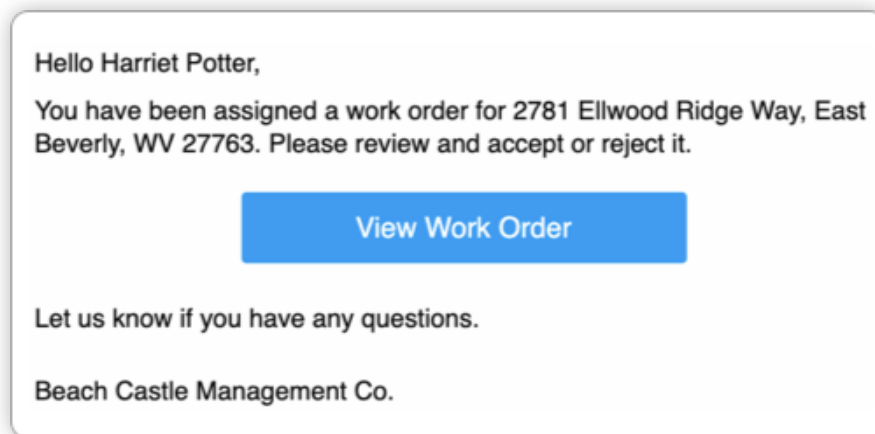
1. [Getting Started](#)
2. [How do I sign in?](#)
3. [Receiving Work](#)
4. [How do I find Work Orders?](#)
5. [I've been assigned, now what?](#)
6. [Estimates](#)
7. [Account Settings](#)

Getting Started

When you are assigned new work from an AppFolio property manager, you will receive an email giving you access to the details of the job.

Note: You will not be able to access the Vendor Portal until a property manager sends you a work order link.

1. **Click the button** in the email and your account will be created and you will be automatically signed in.



How do I sign in?

Vendor Portal offers three ways of signing in to your account.

1. **View the Work Order Email:** When you are assigned new work, you receive an email notification about the job. Click the button to sign into your account.
2. **Request an Access Link:** At vendor.appfolio.com, you can enter in your email address if you have an existing Vendor Portal account. You will then be sent an email with a button that you can click to sign into your account.
3. **Use a Password:** At vendor.appfolio.com, you can sign in with a password if you have created an account before October 2019 or have set a new password. Click `More Sign In Options` then sign in with your email and password.

Using an Access Link

1. Go to vendor.appfolio.com.
2. Type in the email address of your Vendor Portal Account. (Contact your property manager customers if you do not know what email to use)
3. **Click the “Send Access Link” button.**
4. Check your email inbox for an email called “Request to Access Account - Vendor Portal by AppFolio”
5. **Click the first link** and you will be signed in.

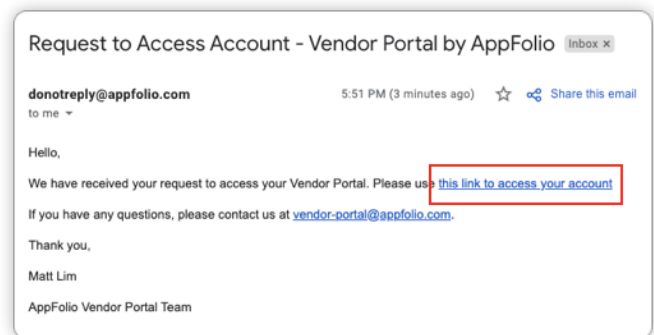
Send an Access Link

Access Links are sent securely to your email. They give you access to your account without using a password.

Email

[Send Access Link](#)

[More Sign In Options](#)



Receiving Work

Once you have a Vendor Portal account, newly assigned work from AppFolio property managers will automatically appear in your Vendor Portal. You will also receive an email notification.

Accept or Decline Work

When you receive a new job in Vendor Portal, you may need to **Accept** or **Decline** the job.

Work Order #33 - 1 | Beach Castle Management Co. **ACCEPT/REJECT** [Download PDF](#)

Work Order Details

Date Scheduled
Not yet scheduled

Date Created
5/29/20

Priority
Normal

Maintenance Limit
Not specified

Job Information

Address
Deen Cottage - C
255 Salerno Avenue, Old Danielport AZ 37109

Permission to Enter
Yes

Description
Fix the closet door which has chipped

Vendor Instructions
see above

Management Company Contact
Name: Mattuser Lim
Email: matthew.lim+user1@ppfolio.com

Decline **Accept**

- **Accept:** Accepting tells your customer that you will take this job. As a result, you will be able to view the work order on Vendor Portal.
- **Decline:** Declining tells your customer that you are not able to take this job. As a result, the work order will not be visible on Vendor Portal and your customer will receive an email notifying them that you have declined.

How do I find work orders?

Search Bar

At any time, you can use the search bar and type in the work order number (e.g. #250-1) or the property address. Clicking any of the results will take you to the Details Page of that job.

VENDOR PORTAL [Search Work Orders](#) [FEEDBACK](#) [MAGICAL PLUM...](#)

Estimates In Progress Completed

Estimates

Filter by Property Manager: Select Property Manager

Filter by Status: All Statuses [Clear Filters](#)

Work Orders (Index) Page

The Work Orders (Index) page is where you will see all jobs that you have been assigned to by AppFolio management companies.

The screenshot shows the 'Vendor Portal' interface for 'MAGICAL PLUM...'. The 'Completed' tab is selected. The page displays a list of work orders with filters for 'Property Manager' and 'Status'. The 'Property Manager' filter is set to 'Select Property Manager' and the 'Status' filter is set to 'All Statuses'. The work orders listed are:

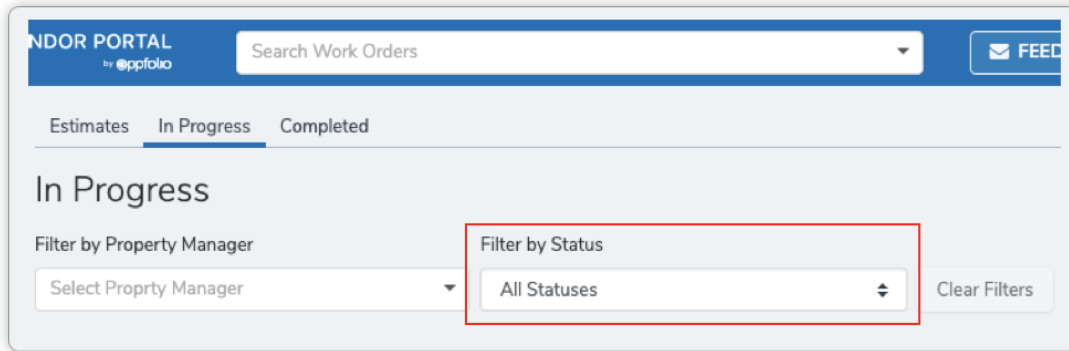
- #7 - 1, Grand Owl Trust (Status: UNDER REVIEW)
Description: Tenant says "My toilet is overflowing AGAIN! It is seeping into the floor and the ceiling below is beginning to cave in. I can't even locate a drip spot so I can't put a bucket underneath." [] ...
Location: Flores Apartments - 5006
2781 Ellwood Ridge Way - 5006, East Beverly WV 27763
- #11 - 1, Beach Castle Management Co. (Status: UNDER REVIEW)
Description: Sink not drain well today
Location: McAlister Manor - 3
09540 Adams Road, New Lydia NE 59338
- #12 - 1, You Can Trust Us Property Management Company (Status: NEEDS INVOICE)
Description: "After flushing toilet, toilet doesn't refill? This is in the downstairs bathroom by the garage" [] Repair the tenant's toilet
Location: Serpent Place
80444 El Capitan Terrace Street, West Bob IN 14600
- #25 - 1, Beach Castle Management Co. (Status: UNDER REVIEW)
Description: My washing machine is not filling with as much water. My clothes come out only slightly damp.
Location: McAlister Manor - 3
09540 Adams Road, New Lydia NE 59338
- #30 - 1, Beach Castle Management Co. (Status: UNDER REVIEW)
Description: []

You can also use filters to help you narrow down the work orders that are visible.

- **Filter by Property Manager:** If you want to view work from a specific management company, click the "Property Manager" field and select the desired customer.

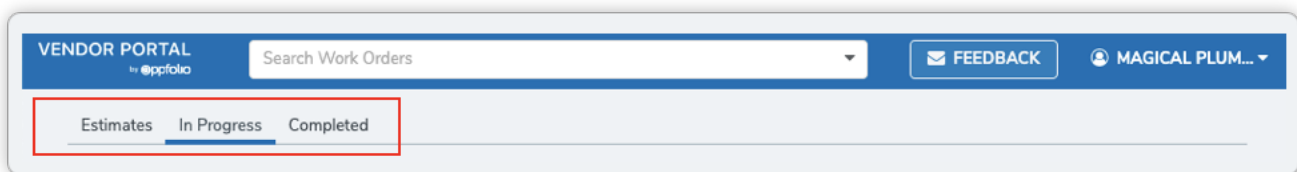
The screenshot shows the 'Vendor Portal' interface for 'MAGICAL PLUM...'. The 'In Progress' tab is selected. The 'Filter by Property Manager' dropdown menu is highlighted with a red box, and the 'Filter by Status' dropdown menu is also visible. The 'Property Manager' filter is set to 'Select Property Manager' and the 'Status' filter is set to 'All Statuses'. The 'Clear Filters' button is also visible.

- **Filter by Status:** If you want to view work with a specific status, click the “Status” field and select the desired status. Each tab will contain different statuses.



Work Order Groups

On the Work Orders page, work orders are separated into three different groups based on the stage of the job.



Groups:

- **Estimates:** When a customer requests an estimate for a job, it will appear in the “Estimates” tab. Navigate here to view work orders that need an estimate.
- **In Progress:** This is for assigned work orders that you have not completed work for. Navigate here to see what jobs you can work on.
- **Completed:** This is for assigned work orders that you have marked as completed and need to be paid for. Navigate here to submit an invoice and to track your payments.

Work Order Statuses

A status is a quick summary that tells you what stage the job is in. On the Work Orders page, statuses are indicated by color coded badges on each work order.

VENDOR PORTAL by @pp1010 Search Work Orders FEEDBACK MAGICAL PLUM...

Estimates In Progress **Completed**

Completed

Filter by Property Manager: Select Property Manager Filter by Status: All Statuses Clear Filters

#7 - 1, Grand Owl Trust	UNDER REVIEW
Description: Tenant says "My toilet is overflowing AGAIN! It is seeping into the floor and the ceiling below is beginning to cave in. I can't even locate a drop spot so I can't put a bucket underneath." [] ...	
Location: Flores Apartments - 5006 2781 Ellwood Ridge Way - 5006, East Beverly WV 27763	
#11 - 1, Beach Castle Management Co.	UNDER REVIEW
Description: Sink not drain well today	
Location: McAlister Manor - 3 09540 Adams Road, New Lydia NE 59338	
#12 - 1, You Can Trust Us Property Management Company	NEEDS INVOICE
Description: "After flushing toilet, toilet doesn't refill? This is in the downstairs bathroom by the garage" [] Repair the tenant's toilet	
Location: Serpent Place 80444 El Capitan Terrace Street, West Bob IN 14600	
#25 - 1, Beach Castle Management Co.	UNDER REVIEW
Description: My washing machine is not filling with as much water. My clothes come out only slightly damp.	
Location: McAlister Manor - 3 09540 Adams Road, New Lydia NE 59338	
#30 - 1, Beach Castle Management Co.	UNDER REVIEW
Description:	

Note: Statuses differ per Work Order group.

Statuses in the "Estimates" Group

NEEDS ESTIMATE

You need to submit an estimate of this job

ESTIMATED

The customer needs to review your estimate

Statuses in the "In Progress" Group

ON HOLD

You should ask the customer if this job is available

ACCEPT/REJECT

You need to accept or reject the job

AVAILABLE

You are able to do the job

SCHEDULED

The job has been scheduled and you are able to do the job

Statuses in the “Completed” Group

NEEDS INVOICE

You need to submit an invoice for this job

UNDER REVIEW

The customer is reviewing your invoice

PAYMENT PENDING

The customer has approved your invoice

PAYMENT SENT

The customer has sent your payment

CLOSED

The job was completed without a payment

I've been assigned, now what?

Details Page

Navigate to the details page by clicking a work order on the Work Orders page. This is where you will see all the details relating to the job.

VENDOR PORTAL by ppfola Search Work Orders FEEDBACK MAGICAL PLUM...

[Back to My Work Orders](#)

Work Order #26 - 1 | Grand Owl Trust SCHEDULED Download PDF

Work Order Details

Date Scheduled
5/29/20, 12:00am - 12:30am

Date Created
3/1/20

Priority
Normal

Maintenance Limit
Not specified

Job Information

Address
Flores Apartments - 5000
2781 Ellwood Ridge Way - 5000, East Beverly WV
27763

Permission to Enter
N/A

Description
Toilet water has leaked through the floor and water is dripping from the ceiling of the first floor

Vendor Instructions

Tenant

Name
Joshua Farr
(558) 379-7253


Call Text

Joshua.Farr@example.net
Email


Schedule FEEDBACK

We will automatically update the property manager and send the tenant a reminder 24 hours before your arrival window.


Scheduled For	Arrival Window
5/29/20	0.5 hours
Time	Timezone
12:00am	PDT



Notes



Invoices



Work Done

Download or Print Work Order

You can download a PDF containing the details of the work order by clicking the "Download PDF" button at the top of the Details Page.

VENDOR PORTAL by @ppfolio Search Work Orders FEEDBACK MAGICAL PLUM...

Back to My Work Orders

Work Order #26 - 1 | Grand Owl Trust **SCHEDULED** [Download PDF](#)

Set Your Work Order Status
In Progress

Work Order Details	Job Information
Date Scheduled 5/29/20, 12:00am - 12:30am	Address Flores Apartments - 5000 2781 Ellwood Ridge Way - 5000, East Beverly WV 27763
Date Created 3/1/20	Permission to Enter N/A
Priority Normal	Description Toilet water has leaked through the floor and water is dripping from the ceiling of the first floor
Maintenance Limit	Vendor Instructions

Scheduling

For maintenance requests submitted by tenants, they may provide their availability. If this is the case, you are able to schedule a time matching their availability.

▼ Tenant Preferred Schedule FEEDBACK

The tenant submitted preferred times for you to complete this job. Are you available for any of these times? If not, select "No Times Work" and send a text or call the tenant to schedule.

Friday 3/13/20: 8:00am - 10:00am
 Monday 3/16/20: 8:00am - 10:00am
 Tuesday 3/17/20: 8:00am - 10:00am




Schedule Job No Times Work

- Select any time and click "Schedule Job" to schedule the job. Your customer and the tenant will be notified..
- We will send the tenant a reminder 24 hours before the scheduled time.

If tenants have not provided their availability, you can also reach out to the tenant directly and schedule a time. After doing so, you can enter in the information in the "Schedule" block.

▼ Schedule FEEDBACK

After you scheduled the job with the tenant, please enter the date and time below. When entered, we will automatically update the property manager and send the tenant a reminder 24 hours before your arrival window.

Scheduled For *	Arrival Window
<input type="text"/> 	2 hours 
Time *	Timezone
<input type="text" value="Enter a time"/> 	PDT

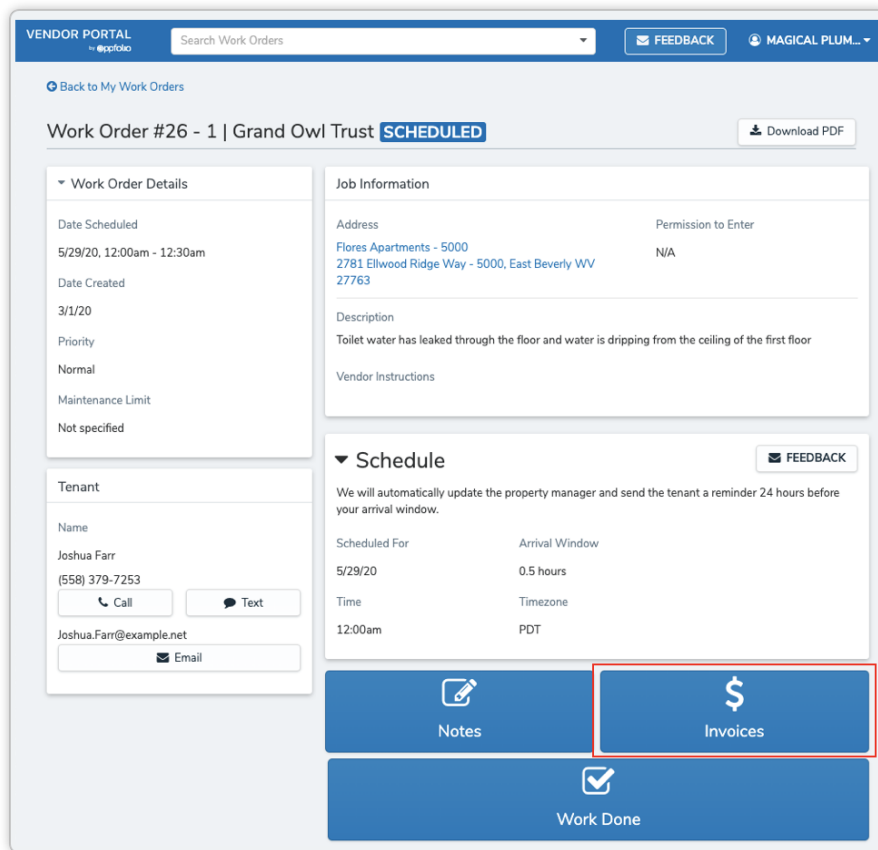
[Schedule Job](#)

- Enter in the date and time that the job has been scheduled. Then click “Schedule Job”.
- The property manager will be updated that the job has been scheduled and the tenant will be sent a reminder 24 hours before the scheduled time.

Sending an Invoice

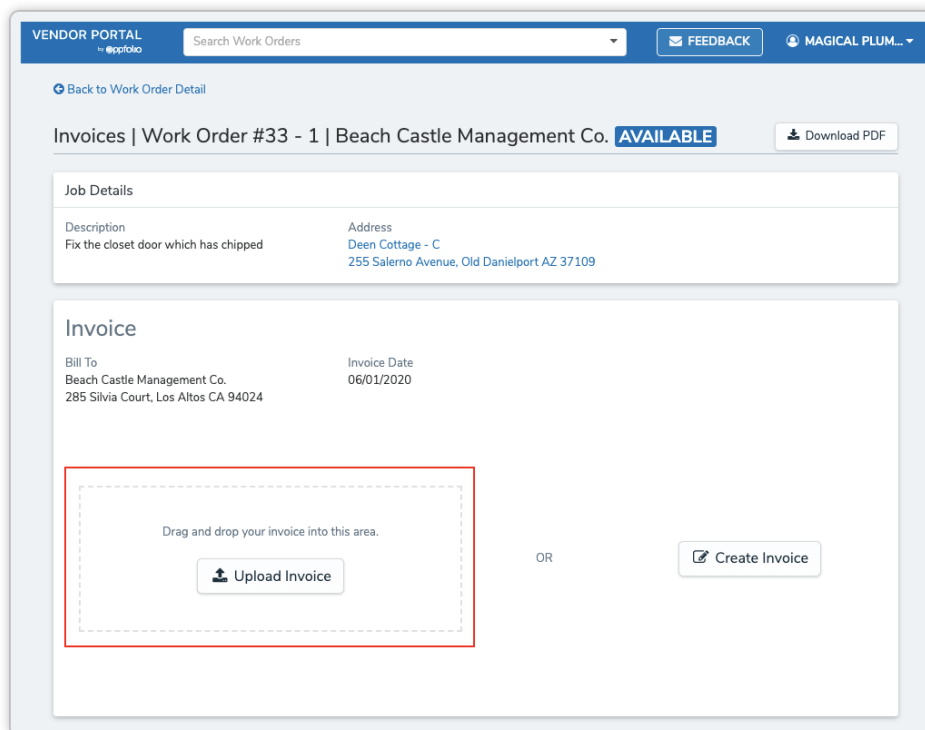
Invoices allow you to tell your customer how much you expect to be paid for your work.

- To send an invoice to your customer, click the “Invoices” button at the bottom of a Work Order



Note: There are two ways you can send an invoice to your customer

Upload an Invoice: If you have another tool you use to create your invoice, you can upload it into Vendor Portal and your customer will receive it.



1. Download a PDF of your invoice from your invoicing tool

2. Upload the PDF into Vendor Portal by dragging it into the dashed box or by clicking the "Upload Invoice" button.
3. Click "Submit Invoice" to finish sending the invoice.

The screenshot shows the 'Invoice' submission interface. At the top, it displays 'Bill To' information for 'Ronnie's Communities' and the 'Invoice Date' as '06/01/2020'. Below this, a PDF icon is shown with the filename 'work_order_33_1.pdf'. A red 'x' icon is visible above the PDF. Underneath, it indicates '1/10 attachments selected' and provides a 'Description' text area with the placeholder 'Write a message about the invoice'. At the bottom, the 'Submit Invoice' button is highlighted with a red rectangular box, and a 'Cancel' button is positioned to its right.

Create an Invoice: You can create a new invoice from scratch by creating billable items.

- **Description:** Enter the item to be paid for such as materials or labor.
- **Quantity:** Enter in the amount of the materials or hours of labor.
- **Rate:** Enter in the cost of individual cost of each material or hourly rate.

The screenshot shows the 'Invoice' creation interface. It displays the same 'Bill To' and 'Invoice Date' information. Below, there is a table for line items with columns for 'Description', 'Quantity', 'Rate', and 'Amount'. The first row contains 'Materials/Hours', '1', '\$ 0.00', and '\$0.00'. A red box highlights a '+' icon in the right margin of the table. Below the table is a green 'Add Line Item' button. At the bottom right, a 'Total' field shows '\$0.00'. At the bottom left, the 'Submit Invoice' and 'Cancel' buttons are visible.

Description	Quantity	Rate *	Amount
Materials/Hours	1	\$ 0.00	\$0.00

[+ Add Line Item](#)

Total: \$0.00

1. Click the "Create Invoice" button on the Vendor Portal Invoice
2. Fill out the Description, Quantity, and Rate for each billable line item
3. If needed, you can add more line items by clicking "Add Line Item"
4. Click "Submit Invoice" to finish sending the invoice.

Invoice

Bill To: Ronnie's Communities
5254 Santa Babby Rd, Santa Barbara CA
93101

Invoice Date: 06/01/2020

Description	Quantity	Rate *	Amount
Materials/Hours	1	\$ 0.00	\$0.00
+ Add Line Item			
			Total
			\$0.00

[Submit Invoice](#) [Cancel](#)

Note: Adding invoices, editing existing invoices, and uploading attachments to invoices will send an email notification to your customer

Editing an Invoice

You can make changes to the invoice by clicking “edit” and by clicking the 3 dots (Kebab) icon

Description	Quantity	Rate	Amount
Hours	3	\$60.00	\$180.00
5 feet, 1/4 inch dia. Copper Pipes	5	\$5.75	\$28.75
Total			\$208.75

Adding a Note

Notes allow you to provide messages and photos about the job to your customer.

- To add notes to your work order, click the “Notes” button at the bottom of a Work Order

VENDOR PORTAL by appfolio Search Work Orders FEEDBACK MAGICAL PLUM...

[Back to My Work Orders](#)

Work Order #26 - 1 | Grand Owl Trust **SCHEDULED** Download PDF

Work Order Details

Date Scheduled: 5/29/20, 12:00am - 12:30am

Date Created: 3/1/20

Priority: Normal

Maintenance Limit: Not specified

Job Information

Address: Flores Apartments - 5000
2781 Ellwood Ridge Way - 5000, East Beverly WV 27763

Permission to Enter: N/A

Description: Toilet water has leaked through the floor and water is dripping from the ceiling of the first floor

Vendor Instructions:

Tenant

Name: Joshua Farr
(558) 379-7253

[Call](#) [Text](#)

Joshua.Farr@example.net

[Email](#)

Schedule FEEDBACK

We will automatically update the property manager and send the tenant a reminder 24 hours before your arrival window.

Scheduled For	Arrival Window
5/29/20	0.5 hours
Time	Timezone
12:00am	PDT

[Notes](#) [Invoices](#)

[Work Done](#)

Add Note *

Completed the sink repair at 2pm on January 24th 2020. I've attached the photos below

[Add Photos to this Note](#)

[Save Note](#) [Cancel](#)

1. Type in your message in the "Add Note" field
2. If you need to add a photo, click the "Add Photos to this Note" button to upload up to 10 photos per note
3. Click the "Save Note" button
4. After saving, you can edit a note by clicking "edit" in the top right corner of a note. Edited messages will receive an "Edited Tag"

EDITED

Last edited on Thu, January 30, 2020 at 10:55 AM PST

Note: Adding notes, editing existing notes, and uploading images to notes will send an email notification to your customer

Work Done

After completing the job, you can tell your customer that you have finished by clicking “Work Done”. This will change the status to Under Review or Needs Invoice if you have not added an invoice.

VENDOR PORTAL by appfolio Search Work Orders FEEDBACK MAGICAL PLUM...

[Back to My Work Orders](#)

Work Order #26 - 1 | Grand Owl Trust **SCHEDULED** Download PDF

Work Order Details	Job Information
Date Scheduled 5/29/20, 12:00am - 12:30am	Address Flores Apartments - 5000 2781 Ellwood Ridge Way - 5000, East Beverly WV 27763
Date Created 3/1/20	Permission to Enter N/A
Priority Normal	Description Toilet water has leaked through the floor and water is dripping from the ceiling of the first floor
Maintenance Limit Not specified	Vendor Instructions

Tenant

Name
Joshua Farr
(558) 379-7253
Call Text
Joshua.Farr@example.net
Email

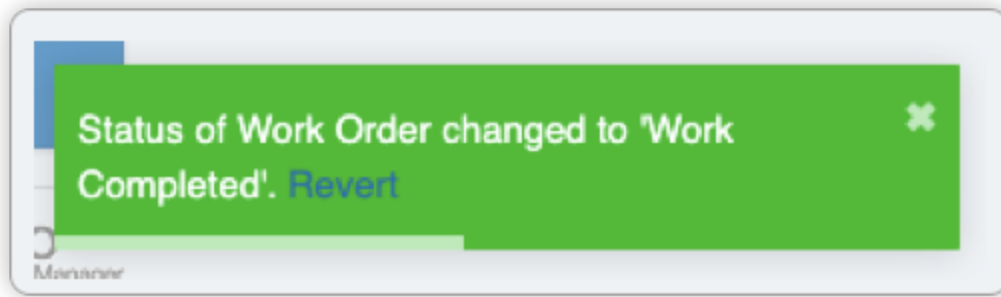
Schedule FEEDBACK

We will automatically update the property manager and send the tenant a reminder 24 hours before your arrival window.

Scheduled For	Arrival Window
5/29/20	0.5 hours
Time	Timezone
12:00am	PDT

Notes Invoices **Work Done**

Note: After moving a work order to the “Work Done” group, you have 10 seconds to undo this action. Do this by clicking “Revert” on the green popup at the bottom of your screen.



Estimates

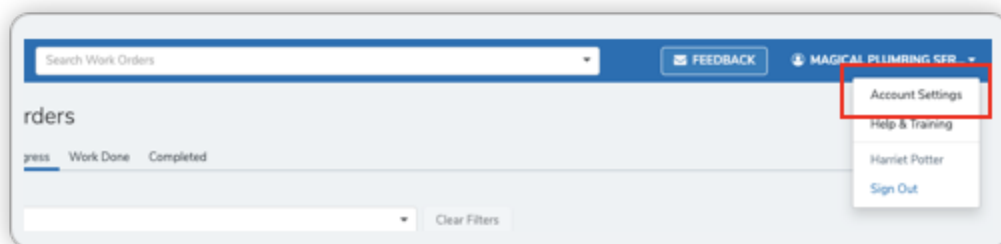
Sending an Estimate

Property Managers have the option to request estimates from multiple vendors for each job. If you are selected, you will receive the job details in the "Estimates" Work Order Group in Vendor Portal.

You will be able to submit an estimated cost which will be submitted back to the Property Manager. If you are approved, this will move to the "In Progress" Work Order Group in Vendor Portal and you will be notified via email.

Account Settings

You can access your settings by clicking on your company's name at the top right corner of your screen.



Contact Information

You can view and edit contact information in the "Contact Information" block.

Contact Information

Name
Harriet Potter

Company Name
Magical Plumbing Service

Address
21814 36th Street
West Corriehaven, AR 34551

Phone
+1 (123) 456-7890

Email
harriet.potter@email.com

[Edit](#)

Insurance Expiration Dates

You can view your insurance information and expiration dates in the “Expiration Dates” block.

Expiration Dates

That Freshness Management Co.

- Liability Insurance**
Expires Soon 03/28/2020
- Workers Comp.**
Expires Soon 03/28/2020
- State License**
Expires Soon 03/28/2020
- EPA Certification**
Expires Soon 03/28/2020

Bookmarking Vendor Portal

There are a few ways you can bookmark Vendor Portal to make it easier for you to access. Follow the instructions for the device you use for Vendor Portal.

Computer

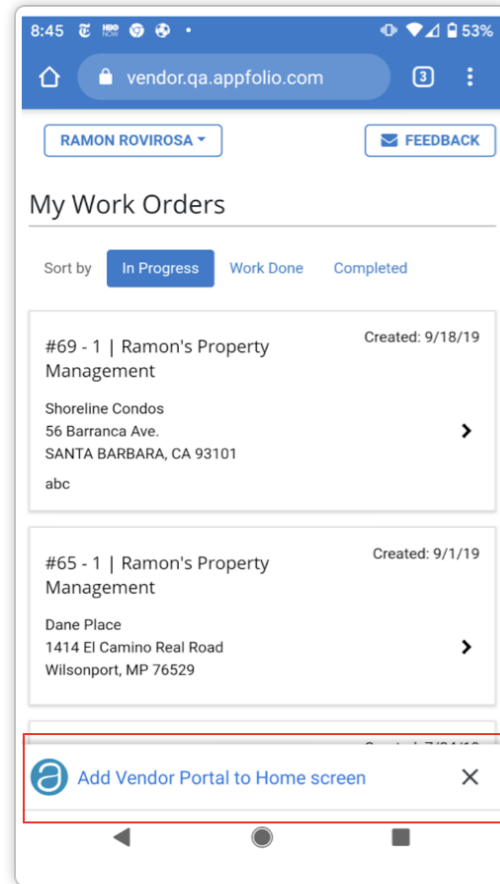
1. Sign in to Vendor Portal through any of the sign in options.
2. Bookmark vendor.appfolio.com.

If you have accessed your account within the last 14 days, you will automatically be signed in. If you have not, you will need to sign in again.

Android Phone

On Android devices, you are able to create an app for Vendor Portal that you can click to go directly to your account.

1. Go to vendor.appfolio.com.
2. Click the “Add Vendor Portal to Home screen” banner.



Apple iPhone

On Apple devices, you are able to create an app for Vendor Portal that you can click to go directly to your account.

1. Go to vendor.appfolio.com.
2. Click the “Share” icon in the bottom toolbar
3. Click “Add to Home Screen”

