Vendor Portal Guide

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

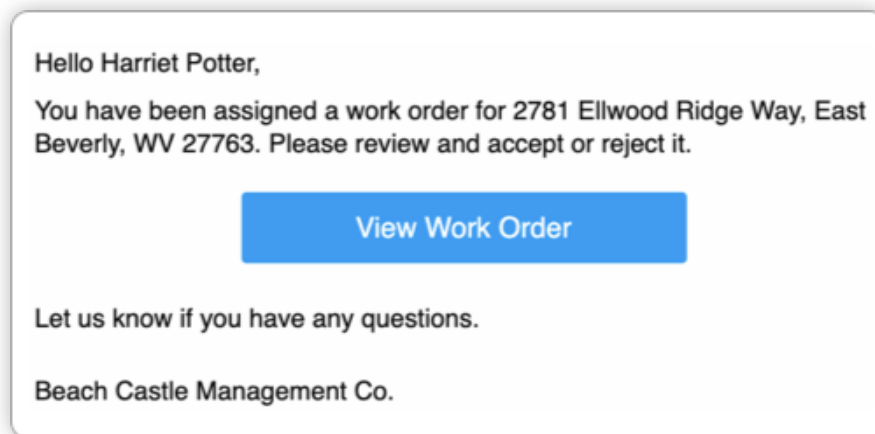## Table of Contents

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.

Hello Harriet Potter,

You have been assigned a work order for 2781 Ellwood Ridge Way, East Beverly, WV 27763. Please review and accept or reject it.

View Work Order

Let us know if you have any questions.

Beach Castle Management Co.

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"

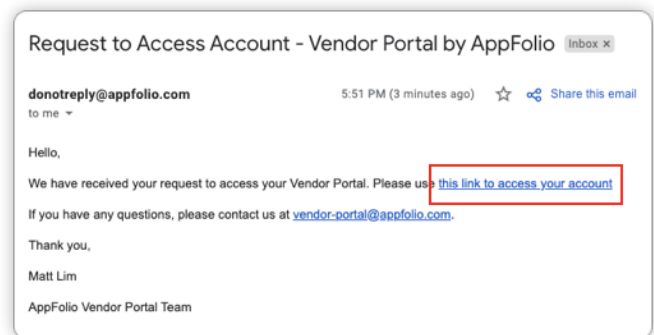5. **Click the first link** and you will be signed in.

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.

- **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.

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.

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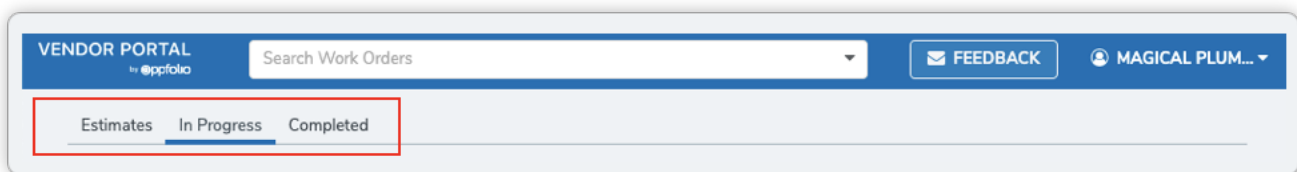
- **Filter by Status**: If you want to view work with a specific status, click the "Status" field and select the desired status. Each tab will contain different statuses.
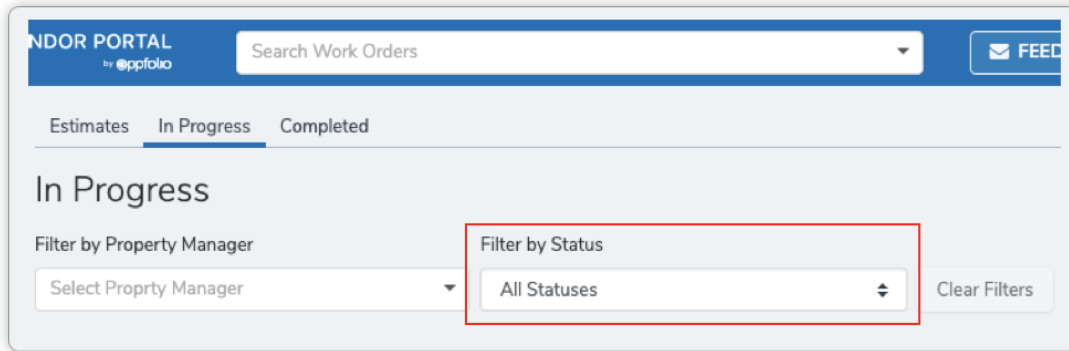
Work Order Groups

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.

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.

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.

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.


- 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.

- 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.
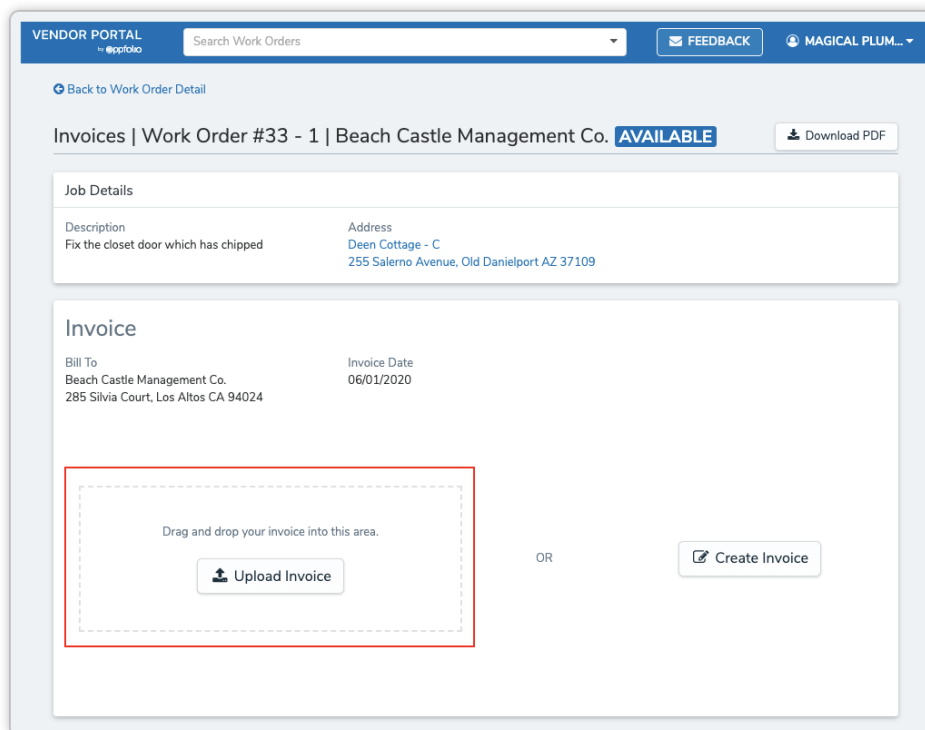
Sending an Invoice

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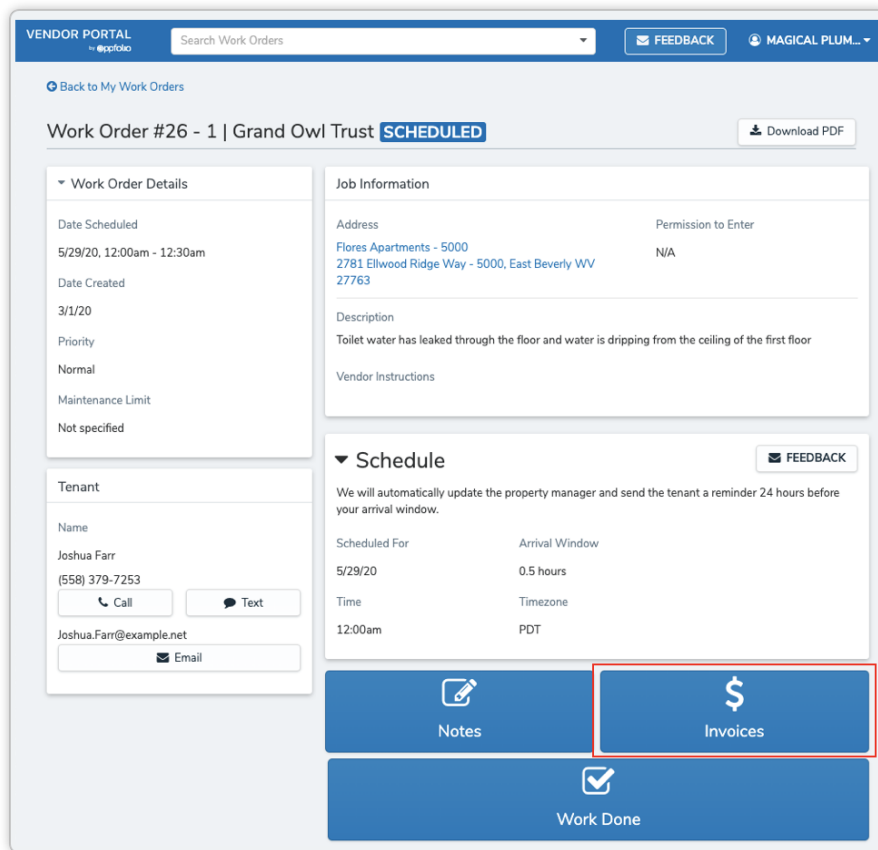
Note: There are two ways you can send an invoice to your customer

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.

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.

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.

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

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

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"

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.

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.
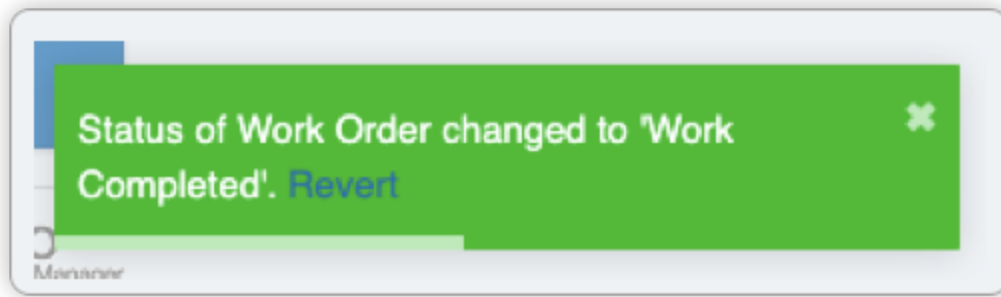
Estimates

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.
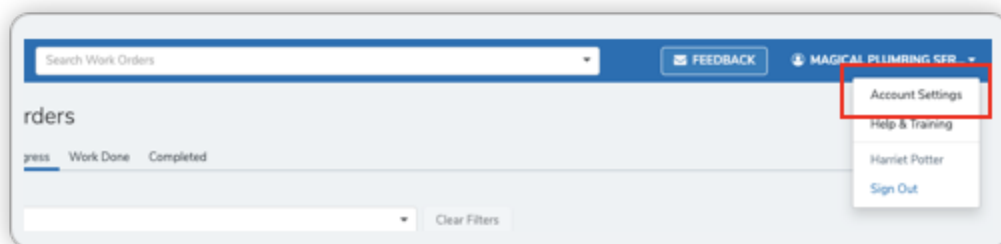
Account Settings

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.

Insurance Expiration Dates

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

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.
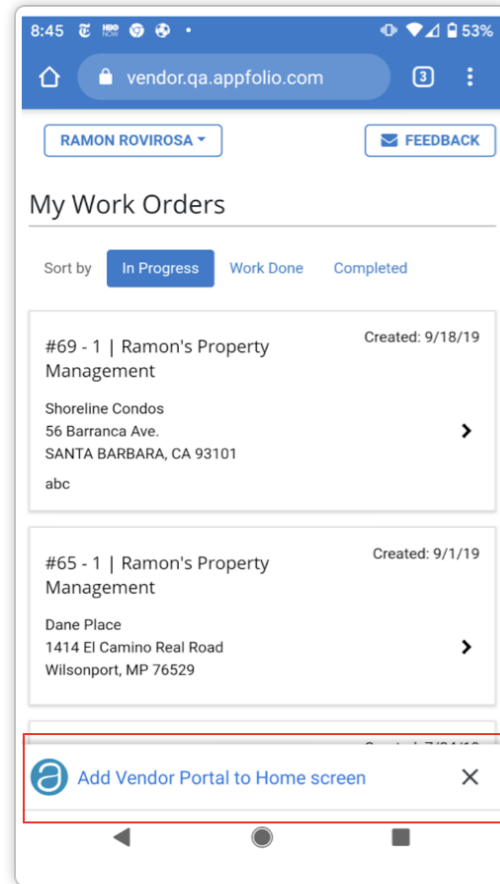
Apple iPhone

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"