

Vendor Portal Guide

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

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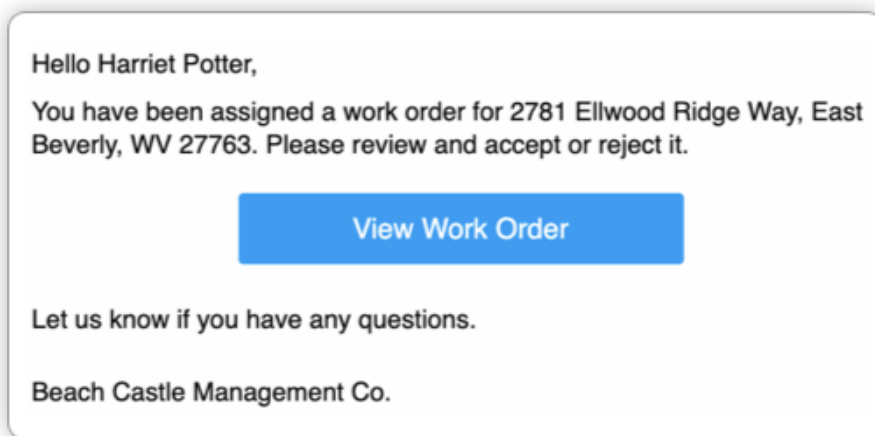
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Getting Started

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

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.



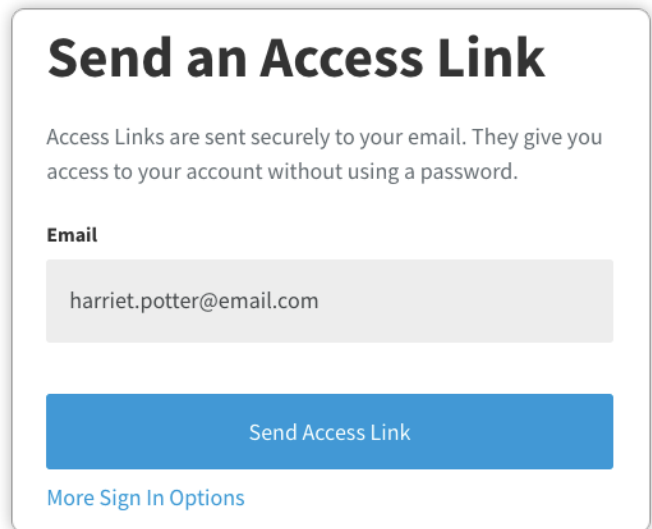
How do I sign in?

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.**



Send an Access Link

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

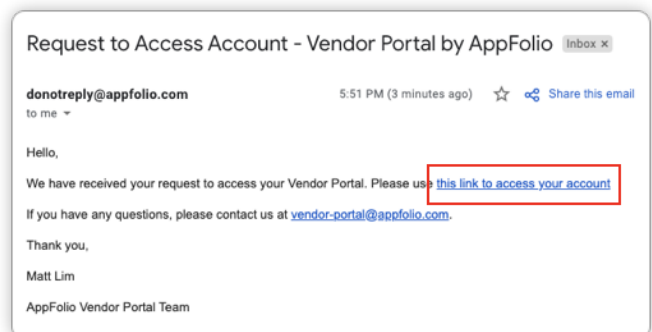
Email

harriet.potter@email.com

Send Access Link

[More Sign In Options](#)

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.



Request to Access Account - Vendor Portal by AppFolio Inbox x

donotreply@appfolio.com 5:51 PM (3 minutes ago) ☆ [Share this email](#)

to me ▾

Hello,

We have received your request to access your Vendor Portal. Please use [this link to access your account](#)

If you have any questions, please contact us at vendor-portal@appfolio.com.

Thank you,

Matt Lim

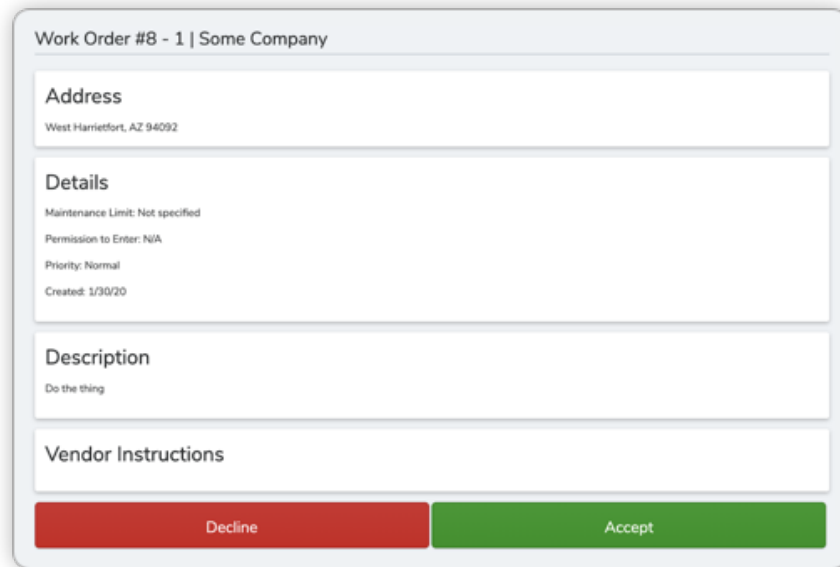
AppFolio Vendor Portal Team

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.



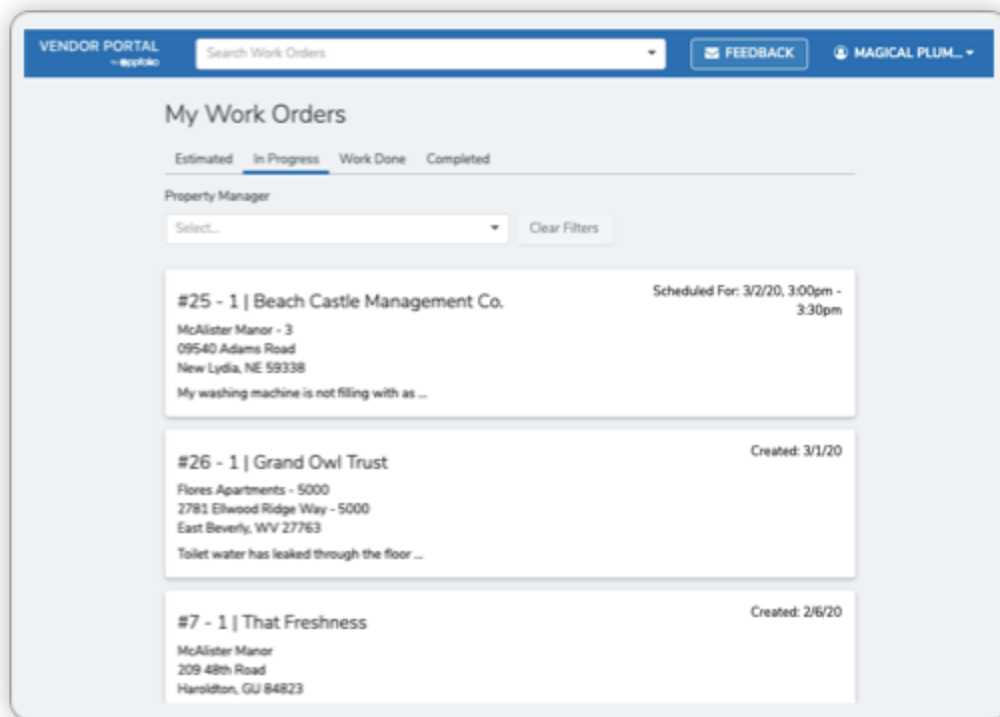
The screenshot shows a 'Work Order #8 - 1 | Some Company' form. It has four main sections: 'Address' with the value 'West Hartford, AZ 94092'; 'Details' with 'Maintenance Limit: Not specified', 'Permission to Enter: N/A', 'Priority: Normal', and 'Created: 1/30/20'; 'Description' with the value 'Do the thing'; and 'Vendor Instructions' which is empty. At the bottom are two buttons: a red 'Decline' button and a green 'Accept' button.

- **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.

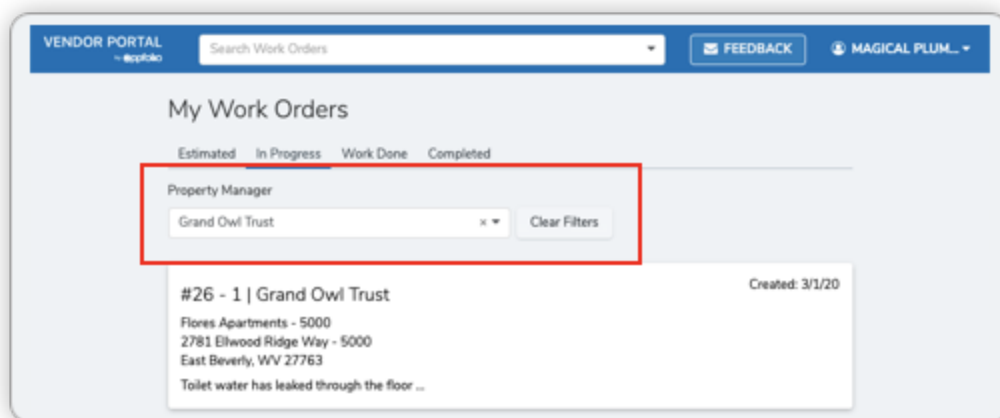
How do I use Vendor Portal?

My Work Orders Page

The My Work Orders page is where you will see all the jobs that you have been assigned from any of your AppFolio property management customers.



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



Work Order Statuses

Work Orders have different Statuses that give you insight into what stage the job is in and what action you need to do next.

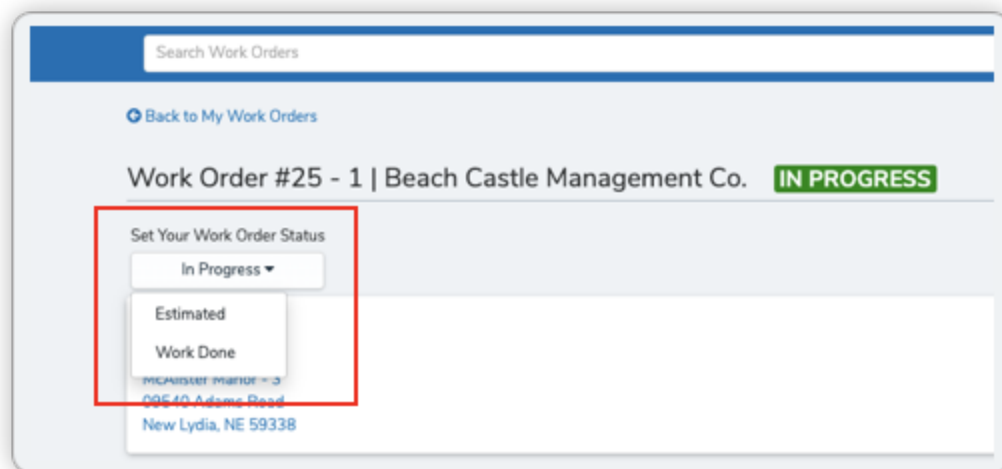
These are the different Statuses:

- **In Progress:** This is for your newly assigned work orders that you have not completed work for.

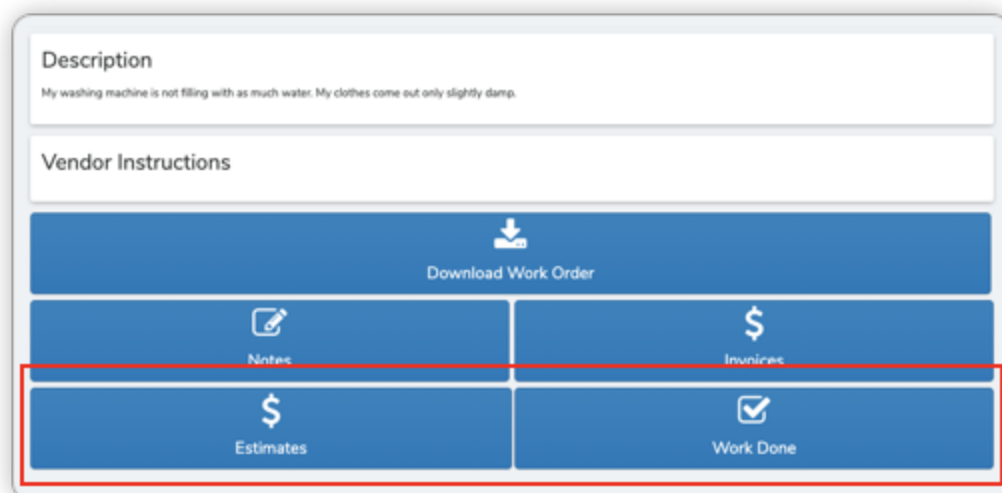
- **Estimated:** If you send an estimate to your customer, you can move your work order to the “Estimated” group while you wait for a response.
- **Work Done:** After you have finished a job, you can move your work order to the “Work Done” group while you wait for your customer to review your work.
- **Completed:** After your customer has approved your work, your work order will automatically be moved to the “Completed” group.

Change Work Order Status

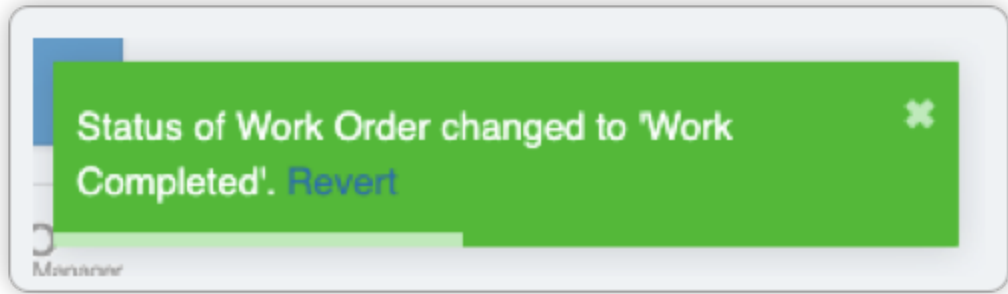
1. You can change the Work Order status by clicking the dropdown field at the top of your Work Order page.



2. You can also change the status by using the “Estimates” and “Work Done” buttons at the bottom of the Work Order page



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.



Scheduling

For maintenance requests submitted by the tenants of property managers, they may provide their availability. If this is the case, you are able to schedule the job.

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

Download Work Order PDF

You can download a PDF copy of the work order to print or save. To do this, click the “Download Work Order” button at the bottom of a Work Order.

Description

My washing machine is not filling with as much water. My clothes come out only slightly damp.

Vendor Instructions

Download Work Order

Notes
Invoices

Estimates
Work Done

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

Description

My washing machine is not filling with as much water. My clothes come out only slightly damp.

Vendor Instructions

Download Work Order

Notes
Invoices

Estimates
Work Done

When sending an invoice, add items to indicate what you need to be paid for

- **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.

Invoices | Work Order #25 - 1 | Beach Castle Management Co.

Description

Quantity

Rate

[Add Another Item](#)

[Add Attachments to this Invoice](#)

[Save Invoice](#) [Cancel](#)

1. Fill in the description, quantity, and rate fields of your first item
2. If you have more items, click the “Add Another Item” button and repeat step 1
3. If you need to add any attachments, click the “Add Attachments to this Invoice” button
4. Click the “Save Invoice” button
5. After saving, you can edit an invoice item by clicking the “3 dot” icon in the table below

[Add Another Item](#)

[Add Attachments to this Invoice](#)

[Save Invoice](#) [Cancel](#)

Invoice

Description	Total
5 feet, 1/4in dia. Copper Pipes	\$28.75
Total Due: \$28.75	

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Powered by **ppfolio** Property Manager

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

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

Description
My washing machine is not filling with as much water. My clothes come out only slightly damp.

Vendor Instructions

Download Work Order

Notes

Invoices

Estimates

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

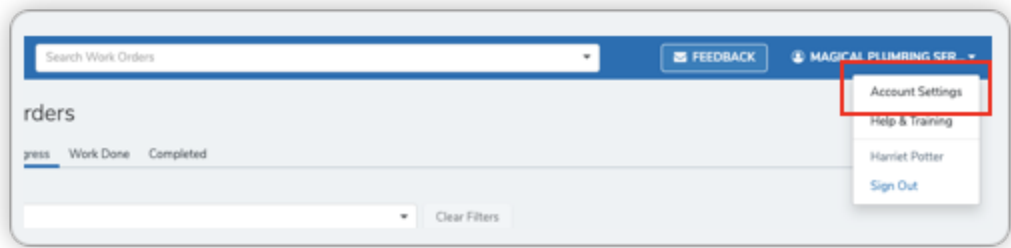
1. Type in your message in the “Add Note” field
2. If you need to add a photo, click the “Add Photos to this Note” button to upload up to 10 photos per note
3. Click the “Save Note” button
4. After saving, you can edit a note by clicking “edit” in the top right corner of a note. Edited messages will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

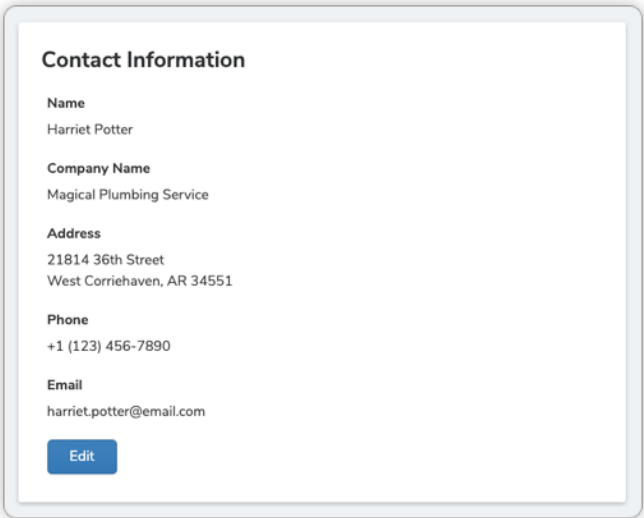
Account Settings

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



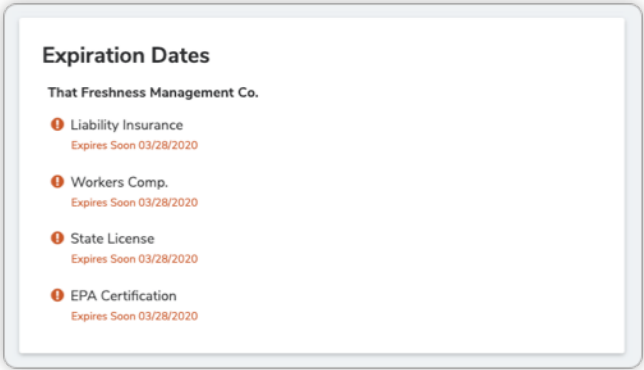
Contact Information

You can view your 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

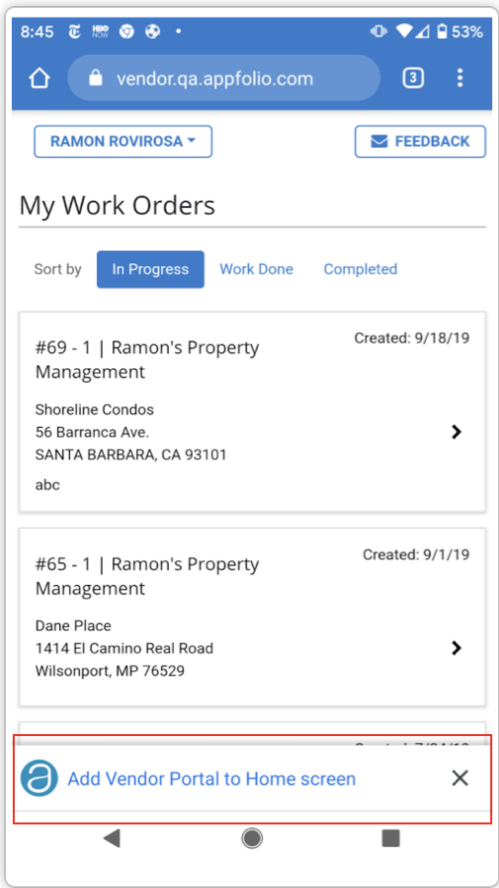
1. Sign in to Vendor Portal through any of the sign in options.
2. Bookmark vendor.appfolio.com.

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"

