



**Blue Horizon Management Company
Vendor Onboarding & Payment Selection Form**

INSTRUCTIONS

- New Vendors with Blue Horizon Management Company:
 - Complete this form & attach the following documents:
 - W-9 Form.
 - Insurance Certificate, with **Blue Horizon Management Company** as **BOTH (1) a certificate holder and (2) named as additionally insured. See attached Certificate example.**
- Current Vendors with Blue Horizon Management Company:
 - Complete this form to change your payment options.
- **Send Form to:** accounting@bluehorizonmanagement.com.
 - General Accounting Support: accounting@bluehorizonmanagement.com. We will get back to you ASAP!
 - Invoices: Send PDF invoice attachments to ap@bluehorizonmanagement.com. This is an automated mailbox that cannot reply.

VENDOR INFORMATION

Vendor Name:	
Vendor Address:	
Vendor Contact Name:	
Vendor Phone #:	
Vendor E-Mail:	

PAYMENT OPTIONS

Select One:	Payment Delivery Method
<input type="checkbox"/>	Check (may take a week to arrive from payment date). <ul style="list-style-type: none">• Payment Address, if different than the company address:
<input type="checkbox"/>	Direct Deposit (2-Day Delivery from payment date). <i>Fill out the below bank information.</i> As a representative and/or owner of the above-stated business, I authorize and request to deposit all funds due for services rendered, automatically to the account identified below. I understand that it is my responsibility to ensure the below account information is correct and I confirm that I am authorized to accept funds into this account. This authorization will remain in effect until I have cancelled it in writing. <ul style="list-style-type: none">• Bank Name:• Routing #:• Account #:

SIGNATURE

I attest that I am the owner or representative of the above referenced company and that the above information provided is accurate.

Name:

Title:

Date:

Signature:

Office Instructions

1. Verify form is complete and requested documents are provided.
2. Call vendor to verify the form entries are valid
 - a. Don't use the given phone number on this form. Use the phone number on the vendor's website or a reputable directory.





CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

07/11/2022


THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER  GALIT FULLER INS AGENCY INC 4858 VAN NUYS BLVD STE B SHERMAN OAKS, CA 91403 (818)387-6998	CONTACT NAME: GALIT FULLER PHONE (A/C No. Ext): 818- 387- 6998 E-MAIL ADDRESS: G@myagentgalit.com FAX (A/C No): 818- 387- 6958
INSURER(S) AFFORDING COVERAGE	
INSURER A: State Farm Fire and Casualty Company	
NAIC # 25143	
INSURED 	INSURER B: INSURER C: INSURER D: INSURER E: INSURER F:

COVERAGES**CERTIFICATE NUMBER:****REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
<input checked="" type="checkbox"/>	COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input checked="" type="checkbox"/> LOC OTHER:		X		06/01/2022	06/01/2023	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 100,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000 Business Property \$ 1,000
<input type="checkbox"/>	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
<input type="checkbox"/>	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$
<input type="checkbox"/>	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y / N <input type="checkbox"/>	N / A				PER STATUTE <input type="checkbox"/> OTH-ER <input type="checkbox"/> E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)


BLUE HORIZON MANAGEMENT COMPANY is an Additional Insured on the General Liability pursuant to the terms and conditions by form

CERTIFICATE HOLDER**CANCELLATION**

BLUE HORIZON MANAGEMENT COMPANY
2020 Alameda Padre Serra, Ste 220
SANTA BARBARA, CA 93103

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE



© 1988-2015 ACORD CORPORATION. All rights reserved.

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

CMP-4786.1 ADDITIONAL INSURED — OWNERS, LESSEES, OR CONTRACTORS (Scheduled)

This endorsement modifies insurance provided under the following:
BUSINESSOWNERS COVERAGE FORM

SCHEDULE

Policy Number: [REDACTED]

Named Insured:
[REDACTED]

Name And Address Of Additional Insured Person Or Organization:

BLUE HORIZON MANAGEMENT COMPANY
2020 ALAMEDA PADRE SERRA STE 220
SANTA BARBARA, CA
93103

1. **SECTION II — WHO IS AN INSURED** of **SECTION II — LIABILITY** is amended to include, as an additional insured, any person or organization shown in the Schedule, but only with respect to liability for “bodily injury”, “property damage”, or “personal and advertising injury” caused, in whole or in part, by:

a. Ongoing Operations

- (1) Your acts or omissions; or
- (2) The acts or omissions of those acting on your behalf;

in the performance of your ongoing operations for that additional insured; or

b. Products – Completed Operations

“Your work” performed for that additional insured and included in the “products-completed operations hazard”.

However, Paragraph 1. above is subject to the following:

- a. The insurance afforded to the additional insured only applies to the extent permitted by law;

- b. If coverage provided to the additional insured is required by a contract or agreement, the insurance provided to the additional insured will not be broader than that which you are required by the contract or agreement to provide for such additional insured; and

- c. If the contract or agreement between you and the additional insured is governed by California Civil Code Section 2782 or 2782.05, the insurance provided to the additional insured is the lesser of that which:

- (1) Is allowed for the satisfaction of a defense or indemnity obligation by California Civil Code Section 2782 or 2782.05 for your sole liability; or

- (2) You are required by contract or agreement to provide for such additional insured.

We have no duty to defend or indemnify the additional insured under this endorsement until a claim or “suit” is tendered to us.

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

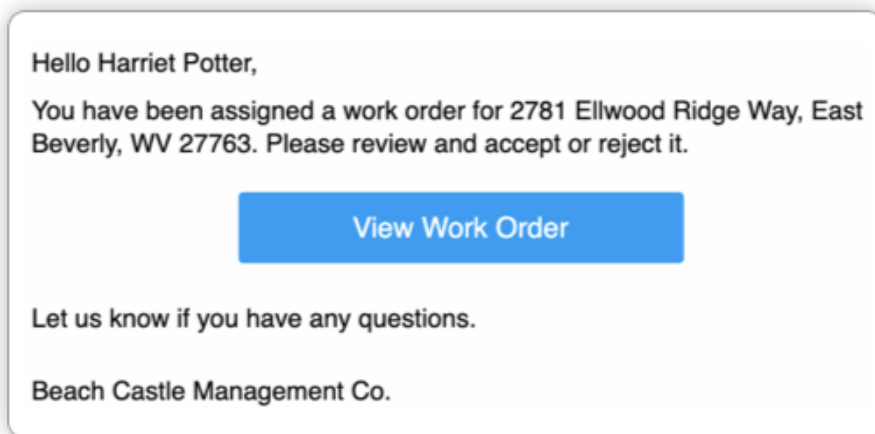
1. [Getting Started](#)
2. [How do I sign in?](#)
3. [Receiving Work](#)
4. [How do I find Work Orders?](#)
5. [I've been assigned, now what?](#)
6. [Estimates](#)
7. [Account Settings](#)

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.



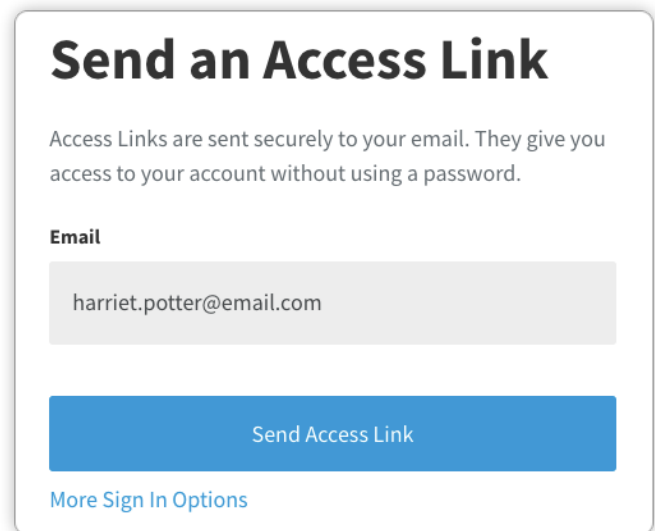
How do I sign in?

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.**



Send an Access Link

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

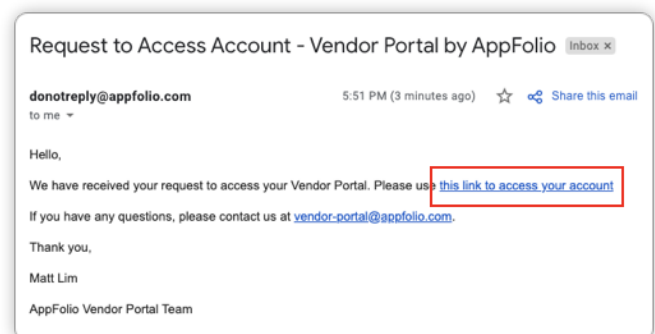
Email

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.

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@appfolio.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 AppFolio. The top navigation bar includes 'VENDOR PORTAL by appfolio', a search bar labeled 'Search Work Orders', a 'FEEDBACK' button, and a user profile for 'MAGICAL PLUM...'. Below the navigation bar are tabs for 'Estimates', 'In Progress', and 'Completed', with 'Completed' being the active tab. The main section is titled 'Completed' and features two filter dropdowns: 'Filter by Property Manager' (set to 'Select Property Manager') and 'Filter by Status' (set to 'All Statuses'), along with a 'Clear Filters' button. A list of five work orders is displayed, each with a title, description, location, and a status tag. The first four work orders are tagged 'UNDER REVIEW', and the fifth is tagged 'NEEDS INVOICE'.

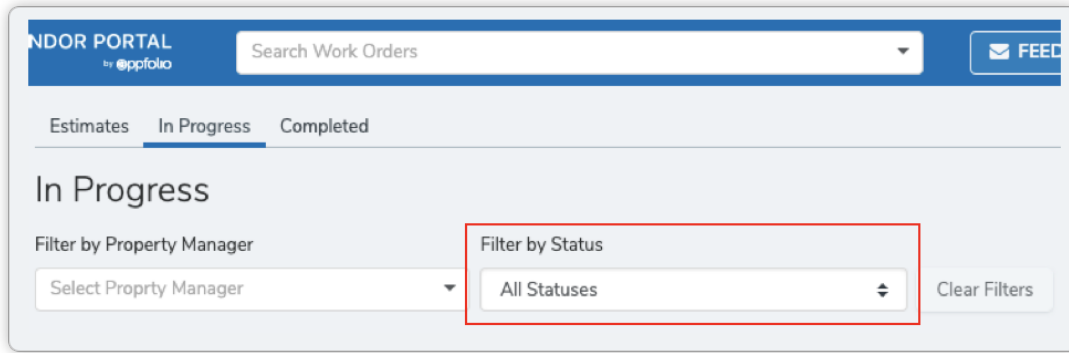
Property Manager	Status	Description	Location
#7 - 1, Grand Owl Trust	UNDER REVIEW	Tenant says "My toilet is overflowing AGAIN! It is seeping into the floor and the ceiling below is beginning to cave in. I can't even locate a drip spot so I can't put a bucket underneath." [] ...	Flores Apartments - 5006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

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.

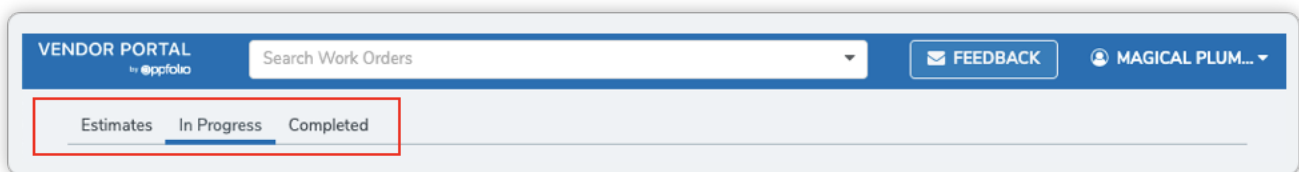
This screenshot shows the 'In Progress' tab selected in the Vendor Portal. The 'Filter by Property Manager' dropdown menu is highlighted with a red rectangle, showing the 'Select Property Manager' option. The 'Filter by Status' dropdown is set to 'All Statuses'. The 'Clear Filters' button is also visible.

- **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 @sploio 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 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

Tenant

Name

Joshua Farr

(558) 379-7253

Call

Text

Joshua.Farr@example.net

Email

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

Schedule

FEEDBACK

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

Scheduled For

5/29/20

Arrival Window

0.5 hours

Time

12:00am

Timezone

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

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

Date Created
3/1/20

Priority
Normal

Maintenance Limit

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

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

2 hours

Time *

Timezone

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

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

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.

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

[Back to Work Order Detail](#)

Invoices | Work Order #33 - 1 | Beach Castle Management Co. AVAILABLE Download PDF

Job Details

Description
Fix the closet door which has chipped

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

Invoice

Bill To
Beach Castle Management Co.
285 Silvia Court, Los Altos CA 94024

Invoice Date
06/01/2020

Drag and drop your invoice into this area.

Upload Invoice

OR

Create Invoice

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.

Invoice

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

Invoice Date
06/01/2020

work_order_33_1.pdf

1/10 attachments selected

Description
Write a message about the invoice

Submit Invoice Cancel

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.

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

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
<div> Add Line Item </div>			
			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 [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 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**

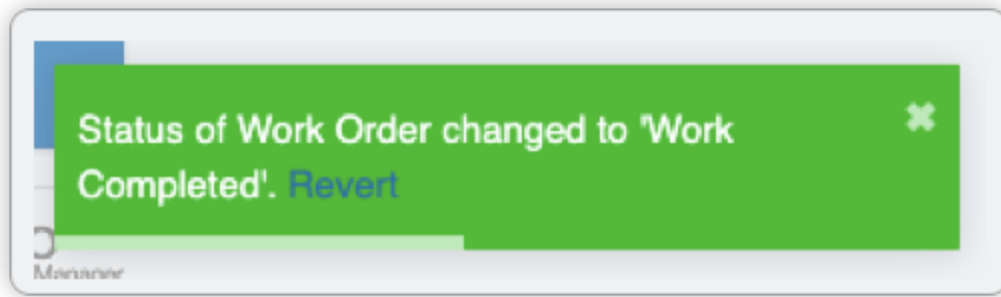
We will automatically update the property manager and send the tenant a reminder 24 hours before your arrival window.

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

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

[Work Done](#)

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

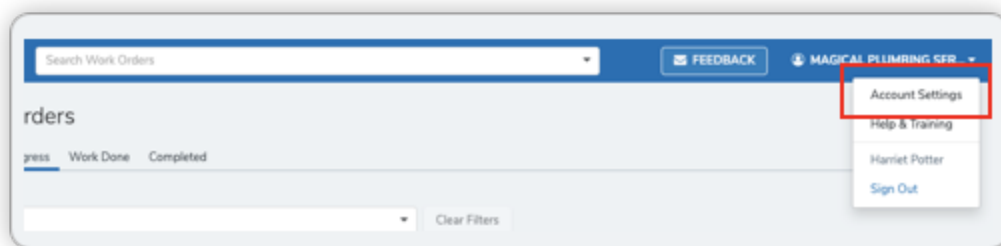
Sending an Estimate

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

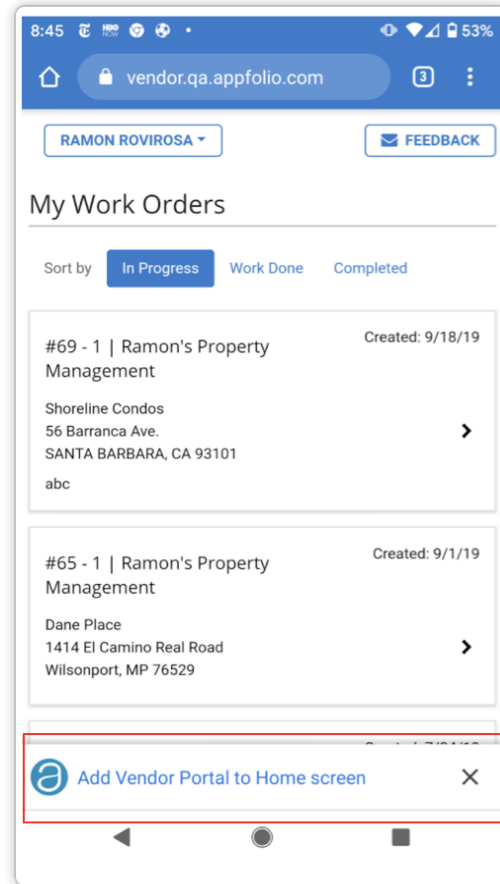
1. Sign in to Vendor Portal through any of the sign in options.
2. Bookmark vendor.appfolio.com.

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”

