

## Vendor Portal – How to Process

### Step 1:

When a Vendor completes a change via the portal i.e. scheduling the work, adding action taken notes, uploading pictures/documents or completing the work. This is managed through the Dashboard within Tasks and Actions. [Vendor Changes To Review](#) will be blue with how many changes need to be processed. Single click on the number to process which will take you to the List Management screen



Single click the Item to expand.

**Enter in your search criteria:**

Project:  Vendor:   By Vendor

Address:  Saved: Has Vendor Changes

Select By:  Begins With

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**Email Options:**

**Print Options:**

1 items in 1 lists found.  
Select the List or Lists that you would like to take action on and click a button above. You can double click a Job to add a new List. You can double click a List to modify it and its Item(s).

|                                     |                   |                |                                    |                      |               |                   |
|-------------------------------------|-------------------|----------------|------------------------------------|----------------------|---------------|-------------------|
| <input checked="" type="checkbox"/> | Eton Hill Estates | Lot #: 9999    | 123 Main Street, Madison, WI 53700 | 1 Yr Exp: 06/12/2020 | Trevor Cooper | 608-347-5555 Cell |
| <input checked="" type="checkbox"/> | List#: MW1009     | Portal Request | Open: 09/20/2016                   | Closed:              | Open          |                   |

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**MW1009 | Portal Request | Open: 09/20/2016 12:00 AM**

**Lot #: 9999 | 123 Main Street, Madison, WI 53700**

**Under 1 Yr Warranty**

WO Title (Items): No Change To Item WO

Progress (Items): No Change To Item Progi

Staff:

Owner:

Review Date:   End:

By: Choose an Employee





Repair Date:   End:

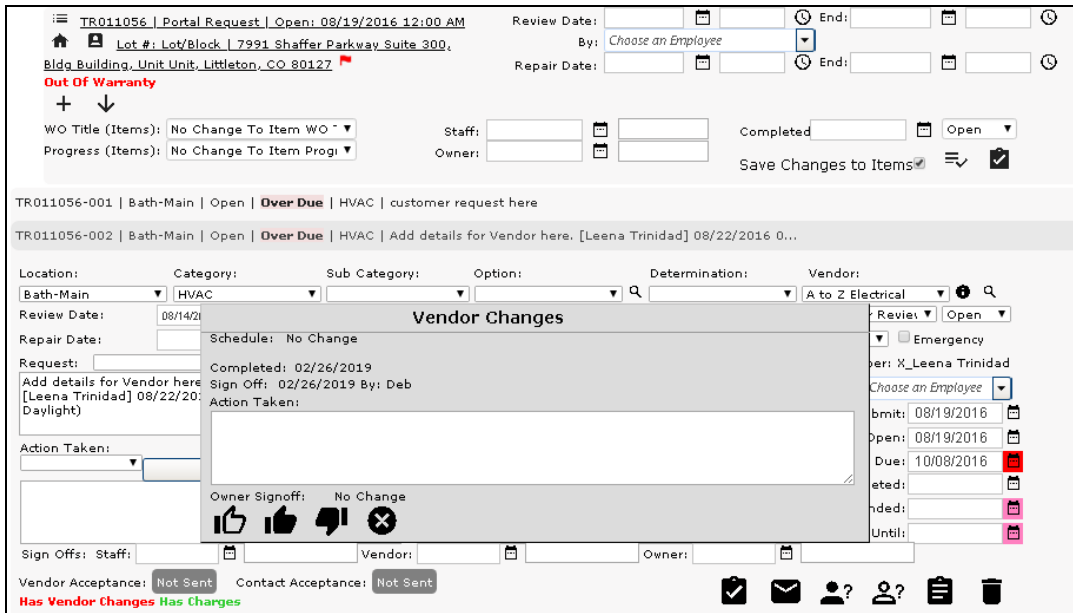
Completed   Open

Save Changes to Items

MW1009-001 | Kitchen | Open | **Over Due** | Appliances | Stove | stove not level

## Vendor Portal – How to Process

Select 'Accept Changes & Close' , 'Accept Changes' , 'Decline Changes' , or 'Cancel'  in the screen shot below we can see the Vendor completed the work. If accepted this information is added within the Item. If declined nothing is added, we recommend an email or some form of communication provided to the Vendor so they are aware the changes were declined. If cancel is selected nothing is processed.



TR011056 | Portal Request | Open: 08/19/2016 12:00 AM




Lot #: Lot/Block | 7991 Shaffer Parkway Suite 300, Bldg Building, Unit Unit, Littleton, CO 80127

**Out Of Warranty**

WO Title (Items): No Change To Item WO ~  
Progress (Items): No Change To Item Progi ~

Staff: [ ] [ ] [ ] [ ]  
Owner: [ ] [ ] [ ] [ ]

Completed [ ] [ ] [ ] [ ] Open [ ] [ ] [ ] [ ]

Save Changes to Items    

TR011056-001 | Bath-Main | Open | **Over Due** | HVAC | customer request here

TR011056-002 | Bath-Main | Open | **Over Due** | HVAC | Add details for Vendor here. [Leena Trinidad] 08/22/2016 0...

Location: Bath-Main | Category: HVAC | Sub Category: | Option: | Determination: | Vendor: A to Z Electrical

Review Date: 08/14/2016

Repair Date: [ ] [ ] [ ] [ ] Schedule: No Change

Request: [ ]

Add details for Vendor here [Leena Trinidad] 08/22/2016 Daylight

Action Taken: [ ]

Completed: 02/26/2019  
Sign Off: 02/26/2019 By: Deb  
Action Taken:

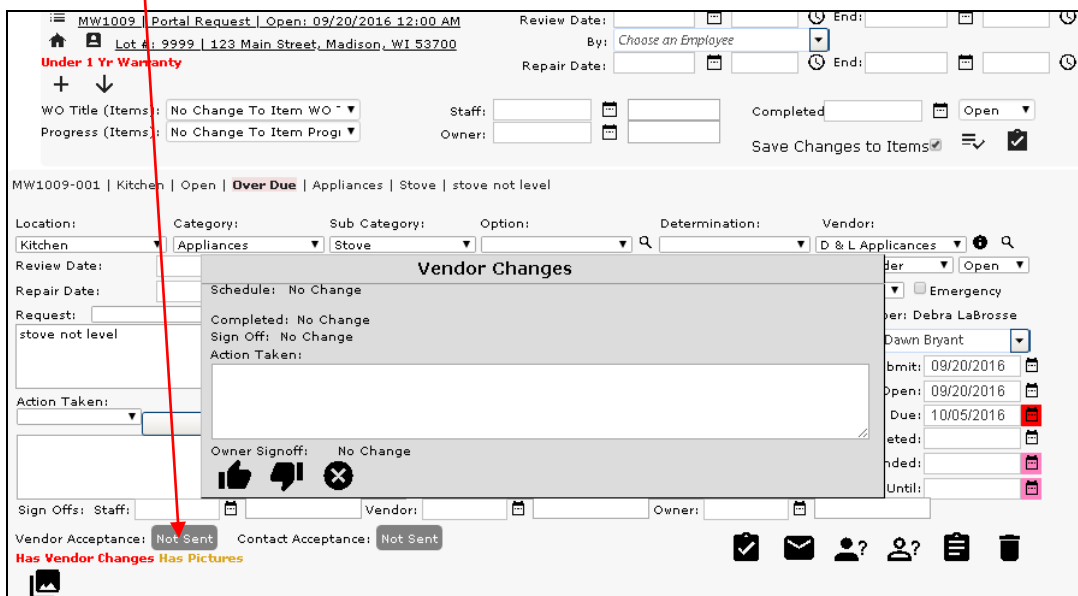
Owner Signoff: No Change

Sign Offs: Staff: [ ] [ ] [ ] [ ] Vendor: [ ] [ ] [ ] [ ] Owner: [ ] [ ] [ ] [ ]

Vendor Acceptance: **Not Sent** Contact Acceptance: **Not Sent**

**Has Vendor Changes Has Changes**

NOTE: this example 'Has Pictures' which is the only change submitted.



MW1009 | Portal Request | Open: 09/20/2016 12:00 AM




Lot #: 9999 | 123 Main Street, Madison, WI 53700

**Under 1 Yr Warranty**

WO Title (Items): No Change To Item WO ~  
Progress (Items): No Change To Item Progi ~

Staff: [ ] [ ] [ ] [ ]  
Owner: [ ] [ ] [ ] [ ]

Completed [ ] [ ] [ ] [ ] Open [ ] [ ] [ ] [ ]

Save Changes to Items    

MW1009-001 | Kitchen | Open | **Over Due** | Appliances | Stove | stove not level

Location: Kitchen | Category: Appliances | Sub Category: Stove | Option: | Determination: | Vendor: D & L Appliances

Review Date: [ ] [ ] [ ] [ ]

Repair Date: [ ] [ ] [ ] [ ] Schedule: No Change

Request: stove not level

Action Taken: [ ]

Completed: No Change  
Sign Off: No Change  
Action Taken:

Owner Signoff: No Change

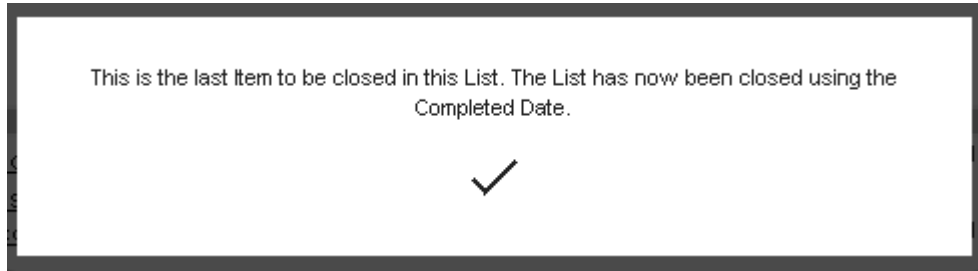
Sign Offs: Staff: [ ] [ ] [ ] [ ] Vendor: [ ] [ ] [ ] [ ] Owner: [ ] [ ] [ ] [ ]

Vendor Acceptance: **Not Sent** Contact Acceptance: **Not Sent**

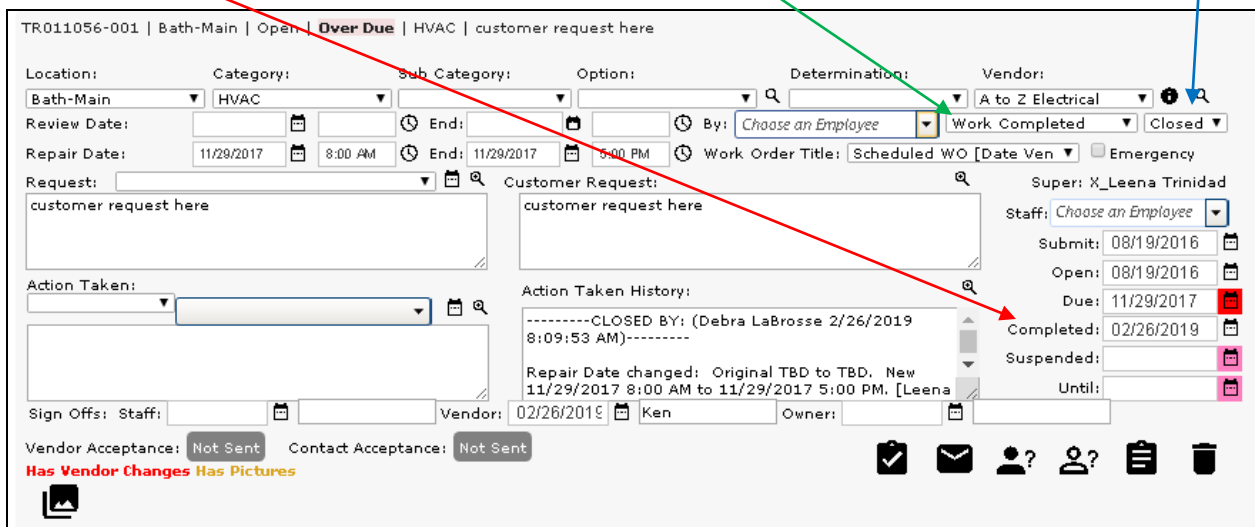
**Has Vendor Changes Has Pictures**

## Vendor Portal – How to Process

In the first example where the Item is completed and the last Item that was open a pop-up appears stating 'This is the last Item to be closed in the this List. The List has now been closed using the Completed Date.



The Completed Date populates, the Progress updates to Work Completed, and the Status updates to Closed; select Save.



TR011056-001 | Bath-Main | Open | **Over Due** | HVAC | customer request here

Location: Bath-Main | Category: HVAC | Sub Category: | Option: | Determination: | Vendor: A to Z Electrical

Review Date: | End: | By: Choose an Employee | Work Completed | Closed

Repair Date: 11/29/2017 8:00 AM | End: 11/29/2017 5:00 PM | Work Order Title: Scheduled WO [Date Ven] | Emergency

Request: customer request here | Customer Request: customer request here | Super: X\_Leena Trinidad

Action Taken: | Action Taken History: -----CLOSED BY: (Debra LaBrosse 2/26/2019 8:09:53 AM)-----

Repair Date changed: Original TBD to TBD. New 11/29/2017 8:00 AM to 11/29/2017 5:00 PM. [Leena

Sign Offs: Staff: | Vendor: 02/26/2019 | Ken | Owner: |

Submit: 08/19/2016 | Open: 08/19/2016 | Due: 11/29/2017 | Completed: 02/26/2019 | Suspended: | Until: |

Vendor Acceptance: Not Sent | Contact Acceptance: Not Sent

Has Vendor Changes Has Pictures