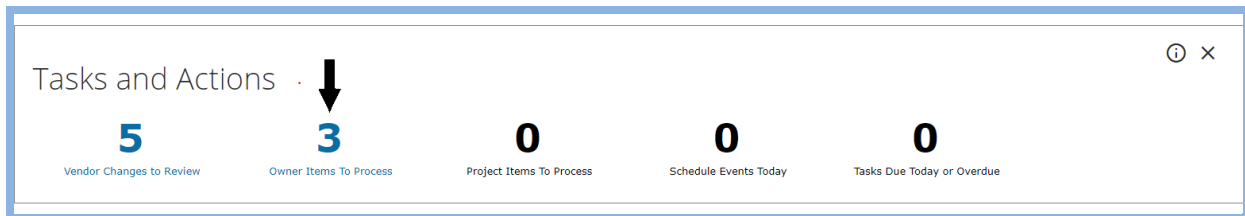


Job (Owner) Portal - How to Process Submissions

Processing Job (Owner) Portal Submissions

Step 1:

When a Homeowner adds a request this is managed on the Dashboard within Builder (Site) Tasks and Actions. [Owner Items To Process](#) will be blue with how many requests need to be processed.



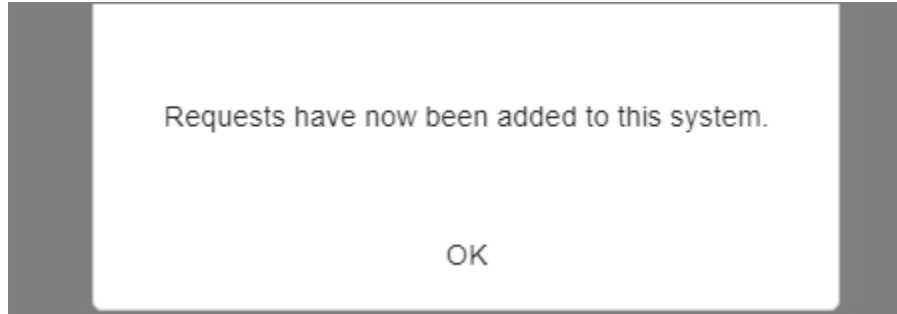
Next a popup window populates where you can select only the items you wish to process. These can be sorted by Staff or Supervisor if desired. After making your selection, select the checkmark in the upper right corner (highlighted below) to process your selected owner items.

Process Requests						
Drag a column header and drop it here to group by that column						
<input type="checkbox"/>	Address	Area	catDesc	Customer Request	staffFullName	superFullName
<input type="checkbox"/>	3250 Turtle Shores Lane, Ponte Vedra Beach, FL 32082	Kitchen	Drywall	Nail Pops [Blake Anderson]	Debra LaBrosse	Dawn Bryant
<input checked="" type="checkbox"/>	4554 Washington Rd, Evans, GA 30809	Exterior	Concrete	Driveway is cracked [Lucy Lu] [Lucy Lu]	Rhonda Herndon	Rhonda Herndon
<input checked="" type="checkbox"/>	4554 Washington Rd, Evans, GA 30809	Kitchen Pantry	Cabinets	Missing shelves [Lucy Lu]	Rhonda Herndon	Rhonda Herndon

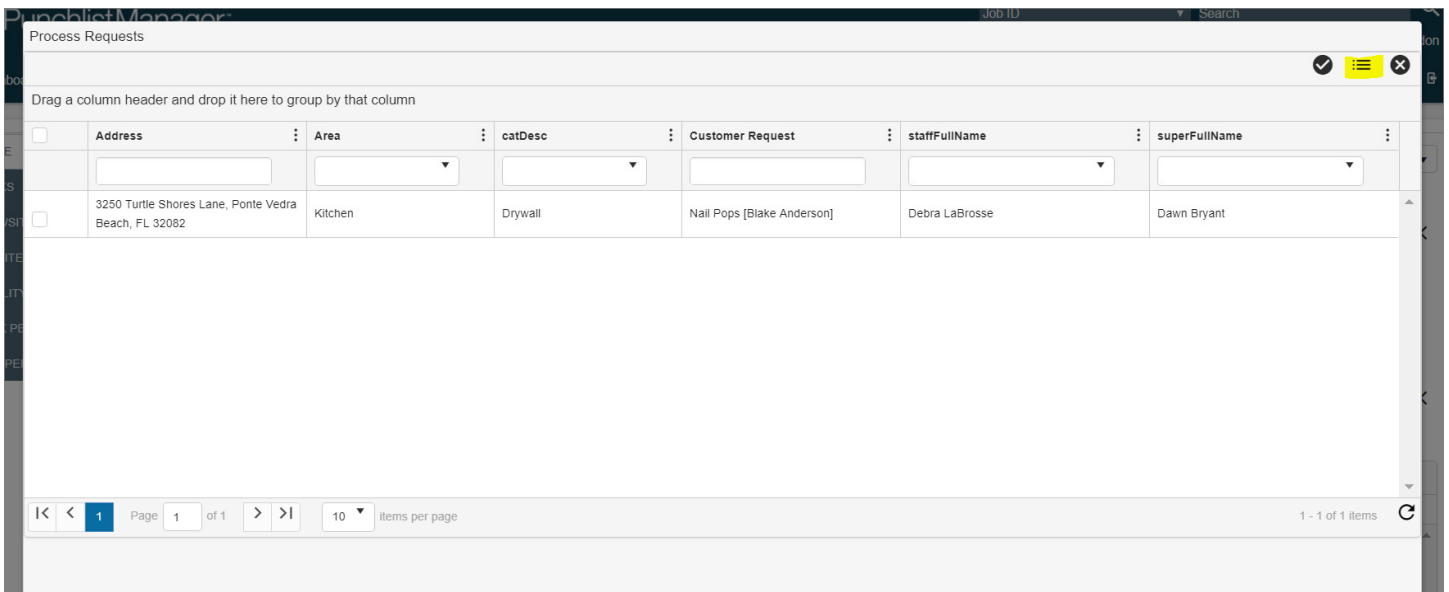
1 - 3 of 3 Items

Job (Owner) Portal - How to Process Submissions

Within the next popup window select 'OK'



Within the next popup window select the List icon (highlighted below) to move to the List Management screen to view the submissions.

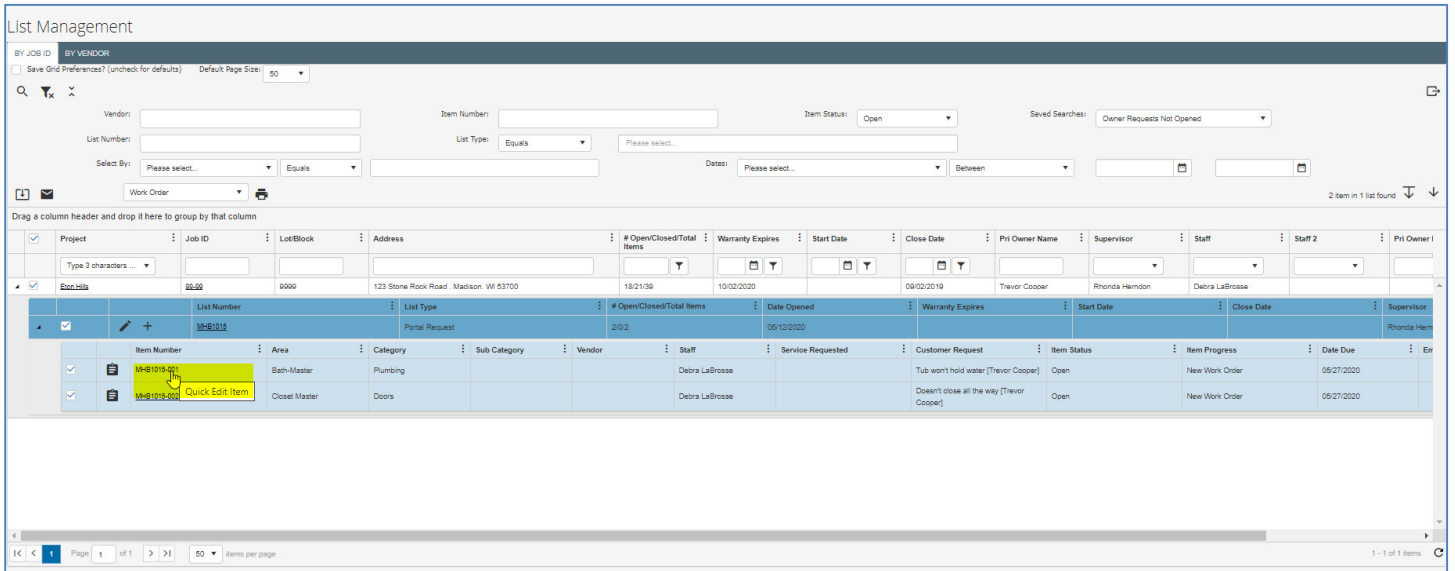


A screenshot of the PunchlistManager web application interface. The title bar shows "Process Requests" and "JOB ID" with a search icon. The main content area displays a table with columns: Address, Area, catDesc, Customer Request, staffFullName, and superFullName. A single row of data is visible. At the bottom, there is a pagination control showing "Page 1 of 1" and "10 items per page". A yellow list icon is highlighted in the top right corner of the interface.

	Address	Area	catDesc	Customer Request	staffFullName	superFullName
<input type="checkbox"/>	3250 Turtle Shores Lane, Ponte Vedra Beach, FL 32082	Kitchen	Drywall	Nail Pops [Blake Anderson]	Debra LaBrosse	Dawn Bryant

Job (Owner) Portal - How to Process Submissions

Within the List Management screen select Item number to enable Quick Edit to enable updating and review of the Item.



The screenshot shows the 'List Management' interface. At the top, there are search filters for Vendor, Item Number, Item Status (set to 'Open'), and Saved Searches (set to 'Owner Requests Not Opened'). Below these are filters for List Number, List Type (set to 'Equals'), and Dates. A table of items is displayed with the following columns: Project, Job ID, Lot/Block, Address, # Open/Closed/Total Items, Warranty Expires, Start Date, Close Date, Pri Owner Name, Supervisor, Staff, and Staff 2. Two items are listed:

Project	Job ID	Lot/Block	Address	# Open/Closed/Total Items	Warranty Expires	Start Date	Close Date	Pri Owner Name	Supervisor	Staff	Staff 2
	0000	9999	123 Stone Rock Road Madison, WI 53700	18/21/30	10/02/2020		09/02/2010	Trevor Cooper	Rhonda Hemdon	Debra LaBrosse	
				2/0/2		05/12/2020					

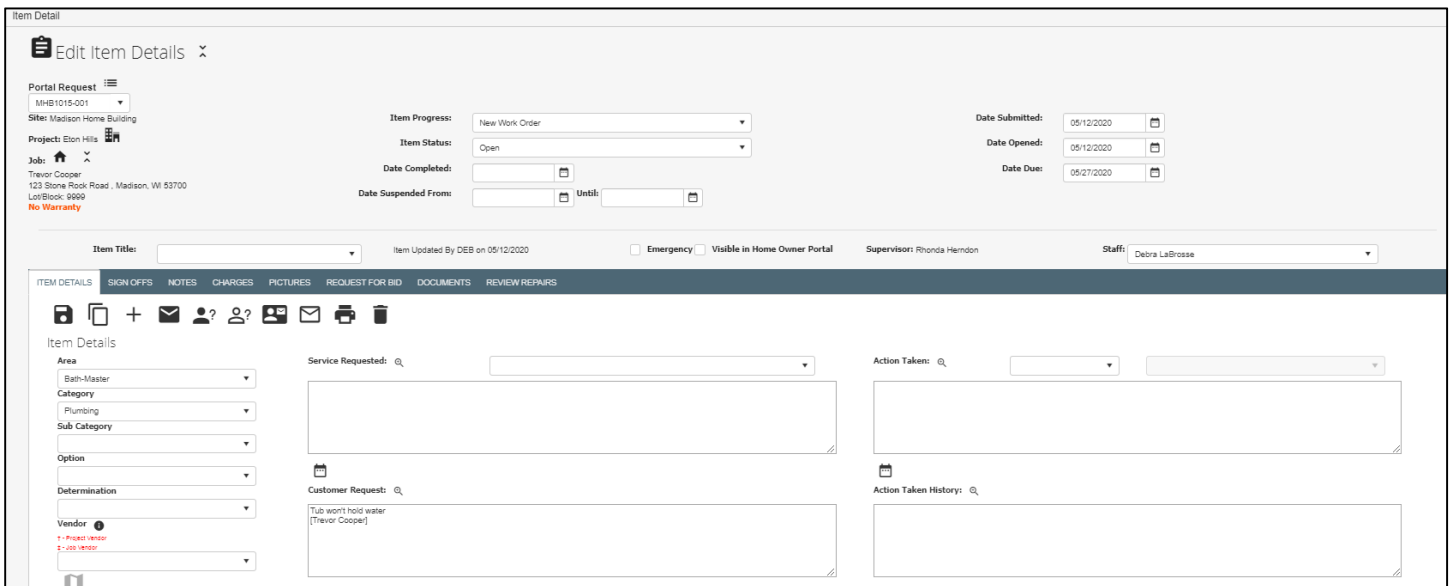
Below the table, a detailed view of an item is shown with columns: Item Number, Area, Category, Sub Category, Vendor, Staff, Service Requested, Customer Request, Item Status, Item Progress, and Date Due. Two items are listed:

Item Number	Area	Category	Sub Category	Vendor	Staff	Service Requested	Customer Request	Item Status	Item Progress	Date Due
MHB1015-001	Bath-Master	Plumbing			Debra LaBrosse		Tub won't hold water [Trevor Cooper]	Open	New Work Order	05/27/2020
MHB1015-002	Closet Master	Doors			Debra LaBrosse		Doesn't close all the way [Trevor Cooper]	Open	New Work Order	05/27/2020

A yellow highlight is over the 'Quick Edit Item' button next to the second item. The bottom of the screen shows pagination: Page 1 of 1, 50 items per page, and 1 of 1 items.

The Item Detail will open so the appropriate fields and selecting more information can be added (if applicable such as Subcategory, Vendor, etc); then Save.

NOTE: Save clears the Item from the Requests Not Opened on the List Management screen



The screenshot shows the 'Item Detail' screen. At the top, there is a tab for 'Edit Item Details'. Below this, there are several sections for editing item information:

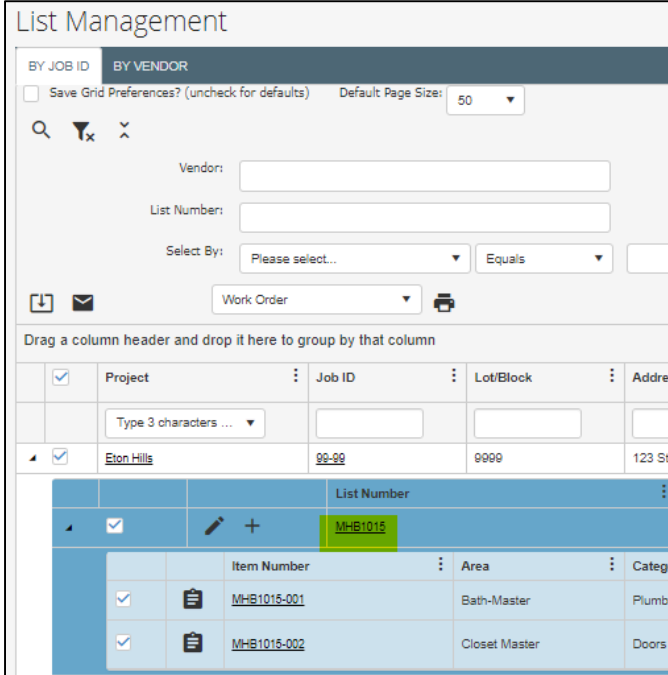
- Portal Request:** MHB1015-001
- Site:** Madison Home Building
- Project:** Eton Hills
- Job:** Trevor Cooper, 123 Stone Rock Road | Madison, WI 53700, Lot/Block: 9999, No Warranty
- Item Progress:** New Work Order
- Item Status:** Open
- Date Submitted:** 05/12/2020
- Date Opened:** 05/12/2020
- Date Completed:** [Empty]
- Date Due:** 05/27/2020
- Date Suspended From:** [Empty] **Until:** [Empty]
- Item Title:** MHB1015-001
- Item Updated By:** DEB on 05/12/2020
- Emergency:** [Unchecked] **Visible in Home Owner Portal:** [Unchecked]
- Supervisor:** Rhonda Hemdon
- Staff:** Debra LaBrosse

Below these fields, there is a section for 'Item Details' with tabs for SIGN OFFS, NOTES, CHARGES, PICTURES, REQUEST FOR BID, DOCUMENTS, and REVIEW REPAIRS. The 'Item Details' section includes:

- Area:** Bath-Master
- Category:** Plumbing
- Sub Category:** [Empty]
- Option:** [Empty]
- Determination:** [Empty]
- Vendor:** Trevor Cooper (Primary Vendor, Job Vendor)
- Service Requested:** [Empty]
- Action Taken:** [Empty]
- Customer Request:** Tub won't hold water [Trevor Cooper]
- Action Taken History:** [Empty]

Job (Owner) Portal - How to Process Submissions

To change/update the List Type (if applicable) select the List Number.



List Management

BY JOB ID | BY VENDOR

Save Grid Preferences? (uncheck for defaults) Default Page Size: 50

Vendor:

List Number:

Select By: Equals

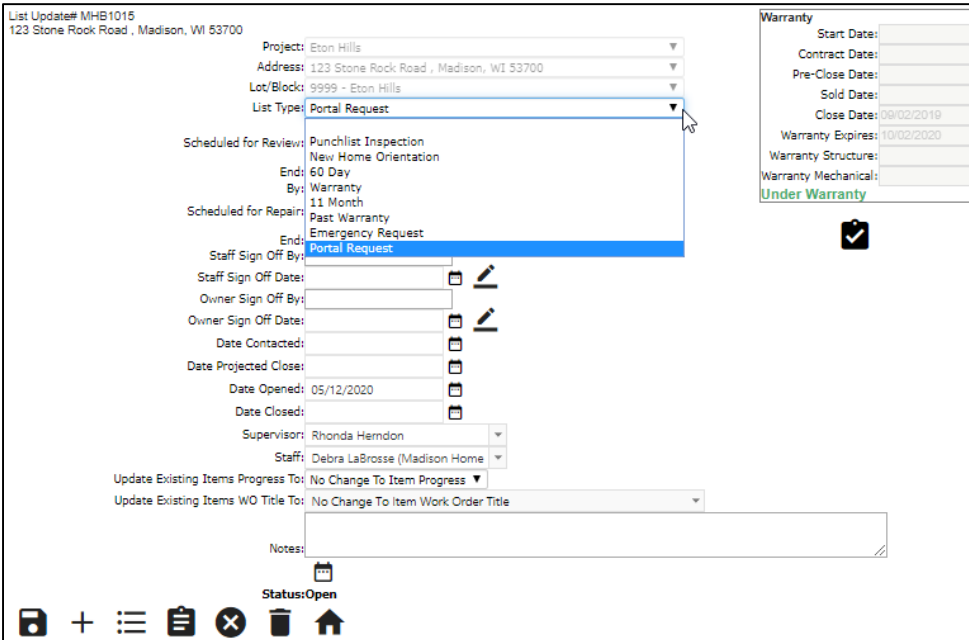
Work Order:

Drag a column header and drop it here to group by that column

<input checked="" type="checkbox"/>	Project	Job ID	Lot/Block	Address
<input checked="" type="checkbox"/>	Eton Hills	99-99	9999	123 Sto

<input checked="" type="checkbox"/>	List Number	Item Number	Area	Category
<input checked="" type="checkbox"/>	MHB1015	MHB1015-001	Bath-Master	Plumbin
<input checked="" type="checkbox"/>		MHB1015-002	Closet Master	Doors

Next within the List Detail screen select the List Type that applies, select Save, then View WO's to take you back into the List Management screen to continue processing the Item(s)/Work order(s).



List Update# MHB1015
123 Stone Rock Road, Madison, WI 53700

Project: Eton Hills

Address: 123 Stone Rock Road, Madison, WI 53700

Lot/Block: 9999 - Eton Hills

List Type: **Portal Request**

Scheduled for Review: Punchlist Inspection
New Home Orientation
End: 60 Day
By: Warranty

Scheduled for Repair: Past Warranty
Emergency Request
End: **Portal Request**

Staff Sign Off By:

Staff Sign Off Date:

Owner Sign Off By:

Owner Sign Off Date:

Date Contacted:

Date Projected Close:

Date Opened: 05/12/2020

Date Closed:

Supervisor: Rhonda Herndon

Staff: Debra LaBrosse (Madison Home)

Update Existing Items Progress To: No Change To Item Progress

Update Existing Items WO Title To: No Change To Item Work Order Title

Notes:

Status: Open

Warranty

Start Date:

Contract Date:

Pre-Close Date:

Sold Date:

Close Date: 09/02/2019

Warranty Expires: 10/02/2020

Warranty Structure:

Warranty Mechanical:

Under Warranty