

## Vendor & Primary Job Contact Acceptance/Rejection

The user has the ability to send an Item/Work order with acceptance button options in the body of the email. This acceptance can be sent to the Vendor assigned to the Item or to the Primary Contact for the Job. The body of the email can be customized. The acceptance can be sent and will display at the Item level in .NET ONLY.

An Administrator user will need to enable the feature in the System Settings and create the body of the email message (Settings>System Setup>Settings>).

Primary Job Contact Acceptance: <input checked="" type="checkbox"/>	Vendor Acceptance: <input checked="" type="checkbox"/>
Vendor Acceptance - Email Body (a copy of the work order always gets sent out):	
Please acknowledge receipt of this request by clicking the respond button, a web page will open in a new window within the web page click the Accept or Reject button in reference to the attached work order. Thank you!	
Job Contact Acceptance - Email Body (a copy of the work order always gets sent out):	
We understand the attached work order has been completed. Please CLICK ACCEPT in this email which will serve as your electronic signature that the work was indeed completed to your satisfaction so we may close the work order.	

There are also Item report settings that need to be adjusted to ensure the Item has the correct fields displaying for the intended receiver. Example: You may not want the homeowner to see the action taken section or you may not want the vendor to see the Owner Submission (see Site Setup>Reporting>Customize Fields).

### WORK FLOW:

- Create Item
- Send to Vendor for Acceptance
- Receive Confirmation
- Send Homeowner Acceptance
- Receive Confirmation

### EXAMPLES:

- Notification Emails
  - Sent
  - Received
- Reference Stamps
  - Sent
  - Acceptance
  - Rejection
- Notification Buttons
  - Not Sent
  - Sent
  - Acceptance
  - Rejection

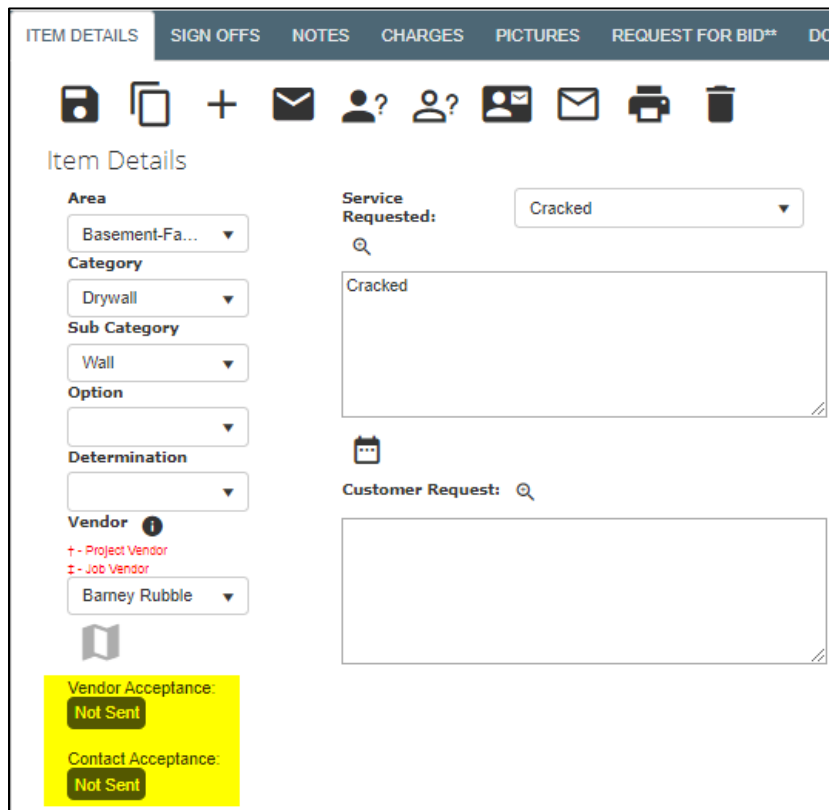
## Vendor & Primary Job Contact Acceptance/Rejection

After an Item is Created & Saved

Click on either REQUEST buttons to send the acceptance email.



### Example of Item Detail screen

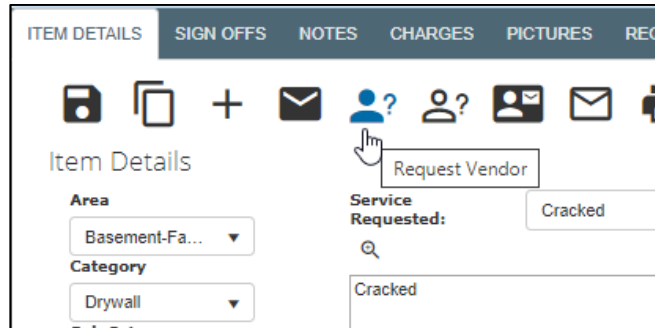


Send to Vendor for  
Acceptance Receive  
Confirmation

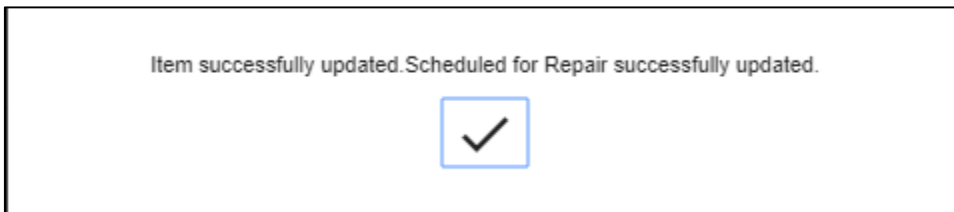
Send Homeowner  
Acceptance Receive  
Confirmation

## Vendor & Primary Job Contact Acceptance/Rejection

Send Acceptance to Vendor  
Click REQUEST  
VENDOR



Confirmation message will pop  
up Click Checkmark

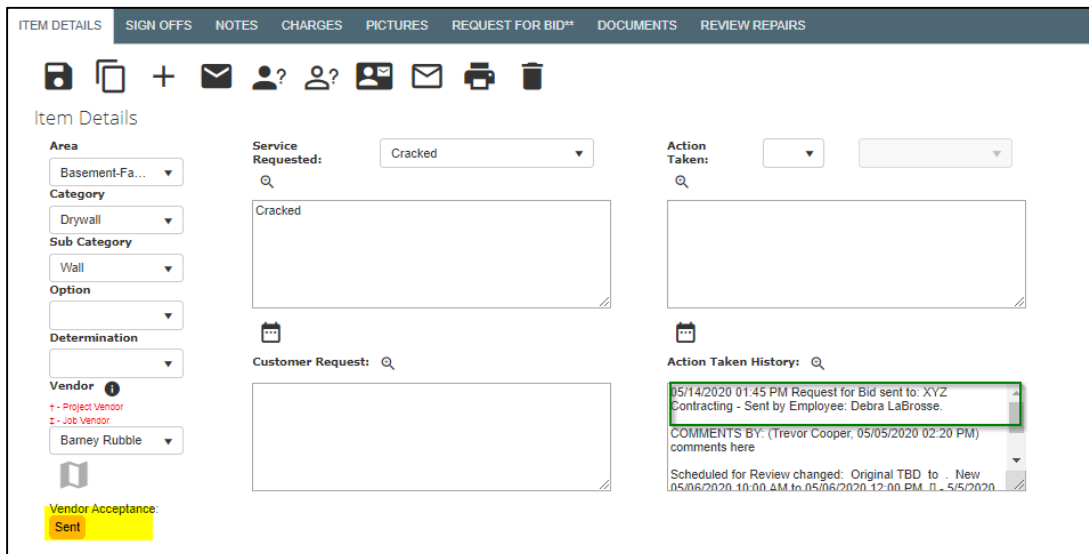


After the user Clicks REQUEST VENDOR:

the NOT SENT icon will change to **SENT**

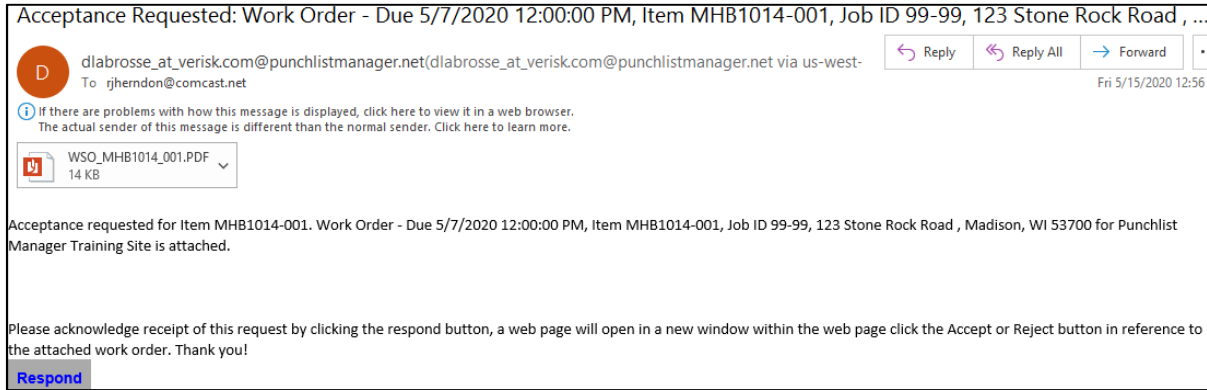
the Action Taken section of the WO will stamp with "Acceptance Request Sent"

an email will be sent to the Vendor that includes the WO as an attached PDF and the body of the email will have the Accept/Reject buttons and customized message that was entered by the Administrator in Setup>System Setup>Settings.

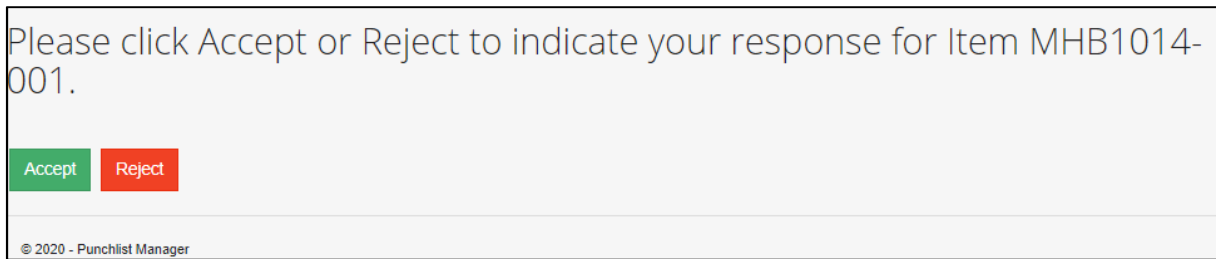


## Vendor & Primary Job Contact Acceptance/Rejection

### Sample email Vendor receives, selecting Respond

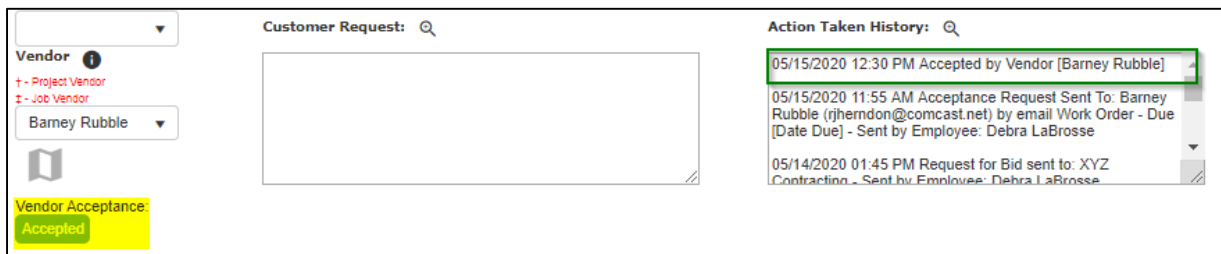


### Vendor then can Accept or Reject



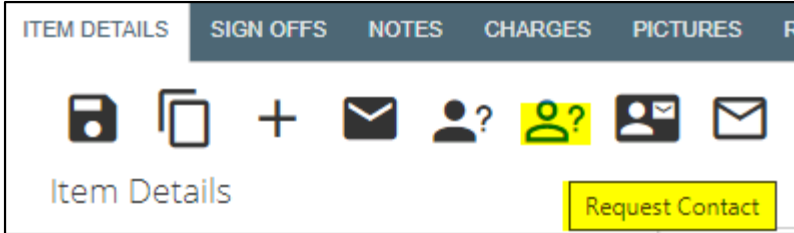
After the Vendor clicks ACCEPT button in the email: the SENT icon will change to **ACCEPTED**  
the Action Taken field will stamp with "Accepted by Vendor"

### Example of Work Order Detail Screen after Vendor Accepts.



## Vendor & Primary Job Contact Acceptance/Rejection

If using the Job/Homeowner Acceptance, the same steps are followed except select Request Contact.



### This example will demonstrate a Rejection by a Homeowner

After the Job Contact clicks the **REJECT** button in the email:

A new browser window will open to select Reject.

Another window will open for a Name and Reason for the owner to select **Submit**

Your rejection has been recorded for Item MHB1014-001.

Please enter your name and a reason for the rejection:

**Name:**

**Reason:**

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### Example of Item Detail Screen with Rejected stamp

