2016

Vendor Manual

MANAGEMENT ONE LICENSED OPERATING SYSTEMS

KNOWLEDGE BASED MANUAL

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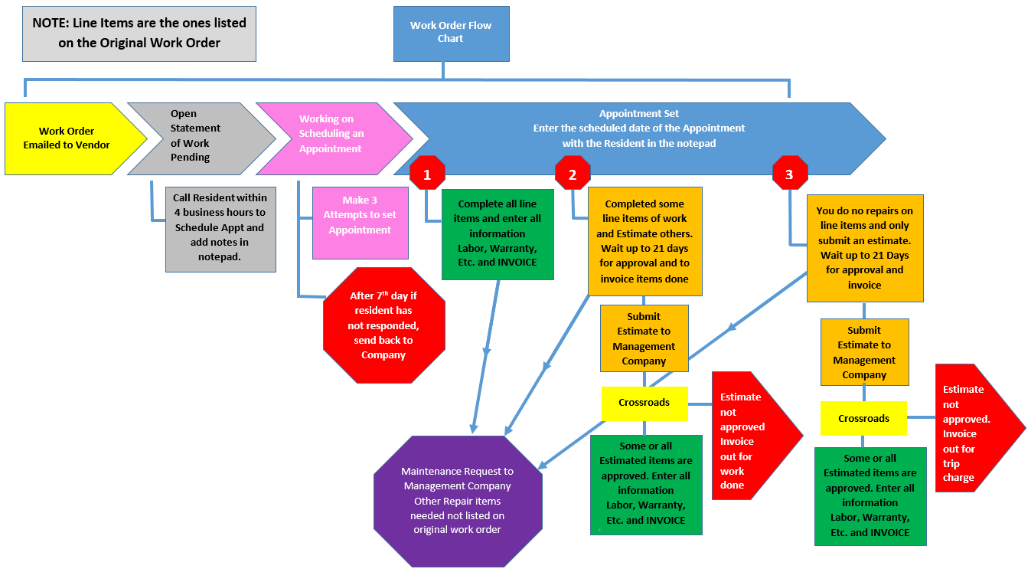
Work Order Flow Chart



How To Find Local Vendors

1. Use Angie's List, Yelp, Google, Yellowpages.com or local telephone directory and search for the category you are looking for (i.e.- plumbers, handyman, etc.)
2. Once you have found a list, print it out and start calling. Do not call the "sponsor" section as they will most likely not be interested.
3. Introduce yourself and the company and give a brief explanation as to why you are calling. Ask them the questions on the interview sheet and use the script when calling. (See script in M1 Doc Drop)
4. If they are interested and their prices are in line with your company's pricing then set up an interview. Remember time is money for them, so try to be flexible when scheduling.
5. Schedule a follow-up with them for a few days out so they have time to review the information and to answer any questions they may have.
6. Once it is established that they want to be in partnership with your company, bring them in for a face-to-face interview. If you both decide to move forward, then they must fill out all the paperwork and provide proof of license and insurance.

Script For Calling Vendors

Click here to download and customize your script.

1. Hi, this is _______________, from 'your' Management Company. We are a property management company based out of ____________. We hire vendors to do the general maintenance in our homes.
2. Tell them a little about your office.
3. Do you have a license?
4. Do you carry 1 million dollars in general liability insurance?
5. If not, would you be willing to get insured for up to 1 million?
6. Do you have worker’s comp? Are you willing to get it?
7. How long have you been in business?
8. What locations do you service?
9. What is your labor rate? We pay around $49 an hour plus a trip charge.
10. What do you charge to install a garbage disposal, water heater?
11. Do you purchase, install and haul away?

**If all things are in line with what you are looking for then proceed with setting up an appointment.
If the vendor is not interested, or their prices are out of line with ours, thank them for their time and move on to the next call.

Vendor Interview Sheet

Click here to download a copy of the interview questions.

1. Do you have a license in your trade? (Not just a business license)
2. Are you insured up to 1 million dollars?
3. If you are not insured up to 1 million dollars, are you willing to get insured for that amount?
4. How long have you been in business?
5. What is your labor rate per hour?
6. What is your service call rate or trip charge?
7. What do you charge for a garbage disposal install? water-heater? (whatever is appropriate for their trade)
8. Do you buy, install and haul away?
9. What areas do you service?
10. Is your service inclusive?
11. Do you have email?
12. Are you equipped with smart phones?

Reference Check On Vendors

Click here to download and customize your reference check form.

Questions:

Does this vendor have any recalls? If so how many?

Do residents complain about workmanship or lack of follow up?

How is the vendor's workmanship?

Does the vendor bill according to your requirements?

Are the invoices turned in timely?

Comments:

Getting Started With General Vendors

1. When they come into the office to meet with you go over the information packet. Show them examples of how the invoicing should be done; prices need to be broken down. Explain to them how they receive work orders via email and what the guidelines are. Give them the packet to review because it explains the advertising program and what is required of them. (*Note there are two different packets, one for Rehab Vendors and one for General Vendors.**)
2. Once it is established that they want to be in partnership with your company, have them sign and return the packet of information.
3. Enter the vendor in the M1 system so that work orders can be issued. (See how to enter a vendor)
4. Email the vendor the excel section of the pricelist that applies to their trade.
5. Start by issuing approx. 5-8 work orders to test them out. An **Email Account** is a requirement. Once the initial work orders have been issued, hold off continuing with new work orders until they have been completed and through the process. They can get a free email account with Yahoo, Google, or MSN.
6. For vendors that are doing General Maintenance, call the residents to do a quick Quality Control (QC) survey to see how the vendor worked out. If the vendor is up to the company's standards then bring them in or call them and give them some feedback. You can let them know if it will work out or not, or if there is anything that needs to be improved on.
7. Create trust and open communication between the maintenance department and the vendor as they are the eyes and ears into these homes, you want them to report back if there is anything wrong and you also want them to know that you are checking to make sure the work is being completed and according to price. This should ensure a great relationship between vendor and your company.
8. With new vendors they need to be brought in once a month for the first 3 months. (See the Vendor Tracking Form in M1 Doc Drop). You can utilize a laptop and fill out the form while doing the meeting. Send a copy of the notes to the vendor, have them sign it and send it back. This will be a time to review invoices, etc. with

the vendor to make sure that both parties are on the same page. Once fully on the company's system vendors will be brought in twice a year, unless you find it necessary bring them in sooner, to ensure communication remains key.

Checklist Of Items For A General Vendor

1. Vendor agreement
2. Vendor info
3. Marketing Agreement **
4. Price List Agreement
5. Example work order
6. Example Estimate
7. Example Invoice
8. Workers Comp. insurance
9. Proof of liability insurance
10. Enter into M1 system and scan in all documents to their file cabinet-(see how to enter a vendor)

** How you sell this makes all of the difference in having your vendor participate in this.
Go over how to use the Vendor Portal (if applicable)

Getting Started With Rehab Vendors

1. When they come into the office to meet with the manager to go over the information packet. Show them examples of how the invoicing should be done; prices need to be broken down. Explain to them how they receive work orders via email and what the guidelines are. Give them the packet to review because it explains the advertising program and what is required of them. *Note there are two different packets, one for Rehab Vendors and one for General Vendors.**
2. Once it is established that they want to be in partnership with your company, have them sign and return the packet of information.
3. Enter the vendor in the M1 system so that work orders can be issued. (See how to enter a vendor)
4. Vendors that are for rehabs must first walk a property with the property inspector. This will allow them see firsthand what the company is looking for. They will also walk a READY property with your property inspector so they can see what the company expects of a completed house. We are not making the house brand new!
5. Once they have walked the property with the Property inspector then issue them one or two properties to get started. This will allow you to see how well they complete the tasks and if they can follow the deadlines. Start them on a house that has some time and is not a rented this way if something does go wrong you have time to fix the problem.
6. Give them the "Rehab Walk Through" and the "Final Is Ready" paperwork or send them the excel version. They should use this with the first job instead of waiting for a house or two this way it is easier for all to follow. **Send **them the excel file so they have** it ahead of time*
7. If all is working out and it is decided by both parties to continue the partnership then a pricelist should be given to the vendor as well as the agreement to sign pertaining to the pricelist. It is important they understand that the prices are set prices and the list is property of the MOLOS.
8. With new vendors they need to be brought in once a month for the first 3 months. Use the attached meeting form during each meeting. You can utilize a laptop and fill out the form while doing the meeting. Send a copy of the notes to the vendor, have them

sign it and send it back. This will be a time to review invoices, etc. with the vendor to ensure both parties are moving forward on the same page. Once fully on the company's system vendors will be brought in twice a year, unless you find it necessary bring them in sooner, to ensure that communication remains key.

9. Companies often use the phrase "licensed andbonded" to show their legitimacy and trustworthiness. When hiring someone to provide a service, it is important that the company ensures the service provider(vendor) is licensed and bonded to safeguard against poor workmanship, theft, and illegal practices. You should also check for documented proof of bonds and licensure.
10. Being licensed ensures that the service provider has been trained in the proper practices and regulations concerning his service. This means the licensee is competent and capable of doing the work at hand. It also means the worker is familiar with the laws and standards of his field in that particular area of governance and can be held accountable if the regulations are not followed. The vendor or general may lose its license to operate in that municipality, state, or the country if rules are not followed. You can also use the company's vendor license number to research through the Better Business Bureau.
11. In many cases, a company may just be licensed, but it is important they are bonded as well. If a company is bonded, it means that a bonding company has set aside money that is controlled by the state and not the company to pay in the event that the company, an owner or a resident files a claim against the vendor. For example, if the company hires a plumbing company and a household good was broken or stolen in the course of the plumber's work, we might file a claim against the company depending on the circumstances. If the ensuing investigation found the plumbing company responsible, the client would be paid out of the bond. A vendor can also get bonds for specific employees who are working with very valuable property, which usually involves a thorough background check.
12. Surety bonds are three party contracts between the principal (vendor), who performs the service, the oblige, (the Company), and the surety, who financially ensures that the principal will fulfill its contractual obligation. The principle pays a premium fee to the

surety, who in turn pays the oblige if the principle defaults on its contract. An example of this might be if a client hired a licensed and bonded lawnmower and the lawnmower only mowed half the lawn. The surety will then reimburse the client for the original fee charged as well as any legal fees from the investigation. Bond companies sell bonds to general and other vendors at competitive prices based on the risk of the service provided.

Checklist Of Items For A Rehab Vendor

(A vendor who only works on properties in between residents)

1. Vendor agreement
2. Vendor info
3. Network Marketing agreement
4. Price List agreement
5. Job estimate example prepared by Company
6. Rehab walk through form by vendor
7. Final Is Ready form
8. Example work order
9. Example Invoice
10. Workers Comp Insurance
11. Proof of General Liability Insurance
    1. Company to be named “Additional Insured”
12. Business License
13. Validate Vendor's license (if necessary)
14. Proof of Vendor's Surety Bond (if required by law)
15. Enter into M1 system and scan in all documents into vendor file cabinet-See “How to enter a vendor” below

How to Add a New Vendor

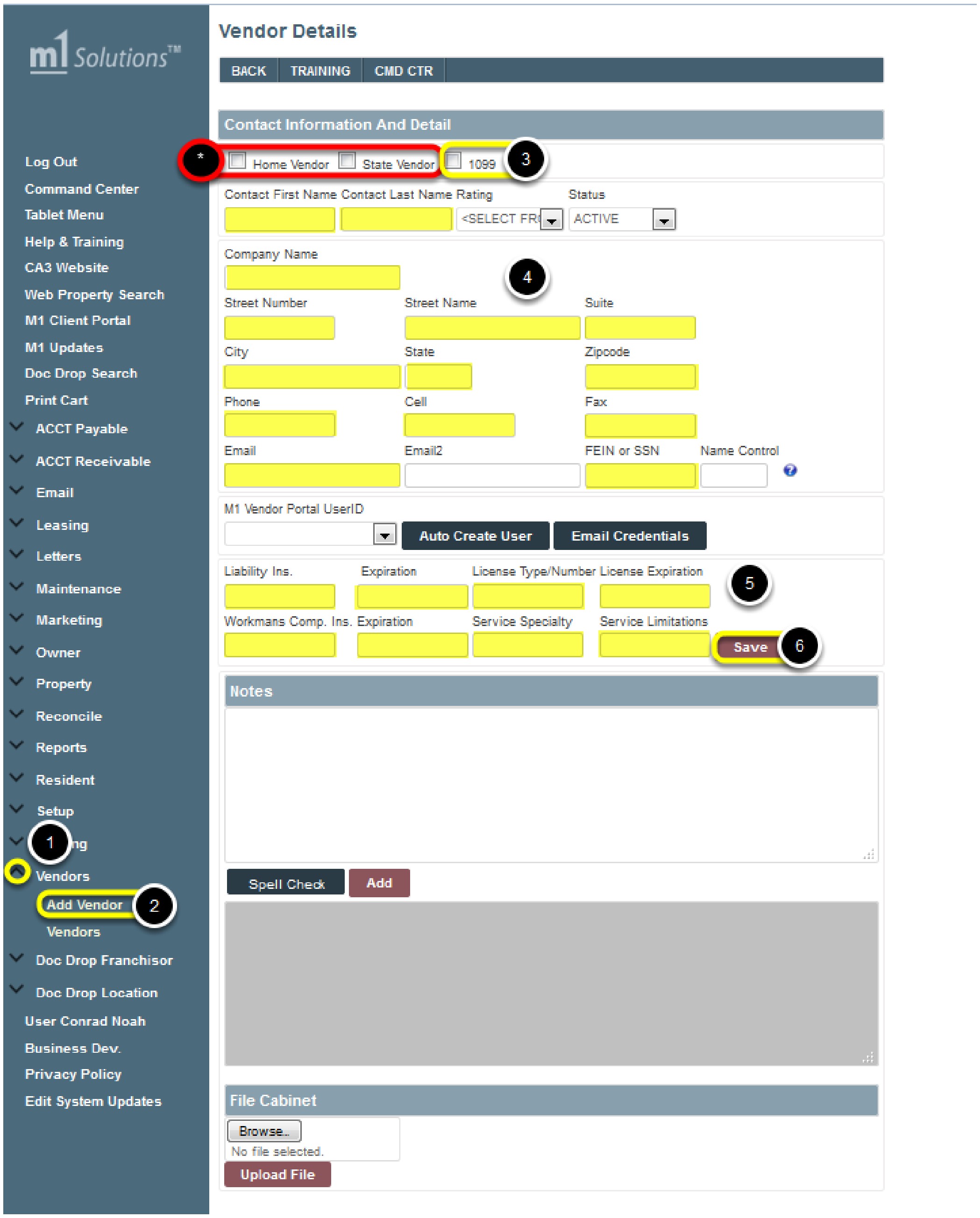
Click here to Watch Video Tutorial
From the Tree View:

1. Expand **Vendor**
2. Select **Add Vendor**
3. Check the **1099** Box (you must have the tax id in order to Save)
4. Enter the **Contact Information and Detail**
5. Make sure to enter their **Insurance** & **License** Information
6. Then click **SAVE**

* Note:

- The **Home Vendor** Box is only to be check for the company's Operating Account
- The **State Vendor** Box is only to be checked if there are State withholding deducted from rents (may or may not apply in your area)

Precision Business Technology, Inc. - Mozilla Firefox



Invoicing

1. If utilizing the Vendor Portal within the location, all invoices must be submitted through the portal. (If not on the portal, when submitting invoices, vendors must submit three copies, one that goes back to them, one that is scanned into the system and one that goes to the owner. DON'T make copies for them.)
2. The bills must be broken down into labor and parts not all lumped together. The exception would be the invoices for rehabs. These must be line itemed but do not have to be broken down.
3. Explain that bills are paid on a net 30, but they may be paid weekly if the funds are available. Bills are usually paid weekly so all invoices should be turned in by Monday's end of business day of that week.
4. Before bills are paid on your designated date, they should be proofed to make sure the vendor did not overcharge and the invoicing is done correctly. If there is an error, then let the vendor know what the error is and to revise the bill before paying it. This reduces the chances that the property owner may call in later to complain about the error.

Work Orders

1. Show the vendor an example of a work order. Explain to them that there is a limit as to the dollar amount that they can spend, depending on the owner's contract with the company. This is always noted on the work order, so they will know prior to going to the job.
2. Vendors can do work on a property whenever a work order is issued if it's below the maximum threshold amount. They can go over the limit by 15% per the owner's contract. ($250 is the standard limit but may vary per office). If the job is going to be over the amount, the vendor must submit an estimate. No work orders should be paid for invoices over the limit, unless prior approval is given, in writing.
3. Once an estimate is submitted, it goes to the owner for approval. If the owner approves and the work is completed within 30 days of the estimate on trip charges is billed. If for some reason the owner delays or declines the estimate the vendor at that time may bill for a trip charge.
4. If an owner approves the estimate, then send confirmation to the vendor using the original work order, noting "approval" under the original request.
5. Invoices must be submitted within 60 days of the work being completed, invoices submitted after 60 days will not be paid.

Insurance Tracking

A vendor report should be ran monthly on any upcoming licenses and/or insurances that be coming up to expire. The M1 System will auto send an email to the designated manager and vendor 30 days prior to the upcoming expiration.
The M1 System will not allow you to issue work orders if these items are not kept current.

Price List

The price list has been created over the last 30 years. In the past, countless hours are spent shopping the isles of Home Depot and Lowes searching for the prices on over 600 most commonly repaired items in homes.
The entire list should not be given out to a vendor unless they are a general vendor and will be covering all types of repairs. Otherwise, only give the vendor the price list that pertains to their specialty. For example, a vendor that is doing rehab will need the entire price list on the other hand a plumber only needs the plumbing portion of the price list.
To ensure that vendors don't sell or duplicate the list they are required to sign and return the price list letter. Without this letter returned signed the vendor is not be given the price list. **This is VERY IMPORTANT as this is a proprietary maintenance price list.**

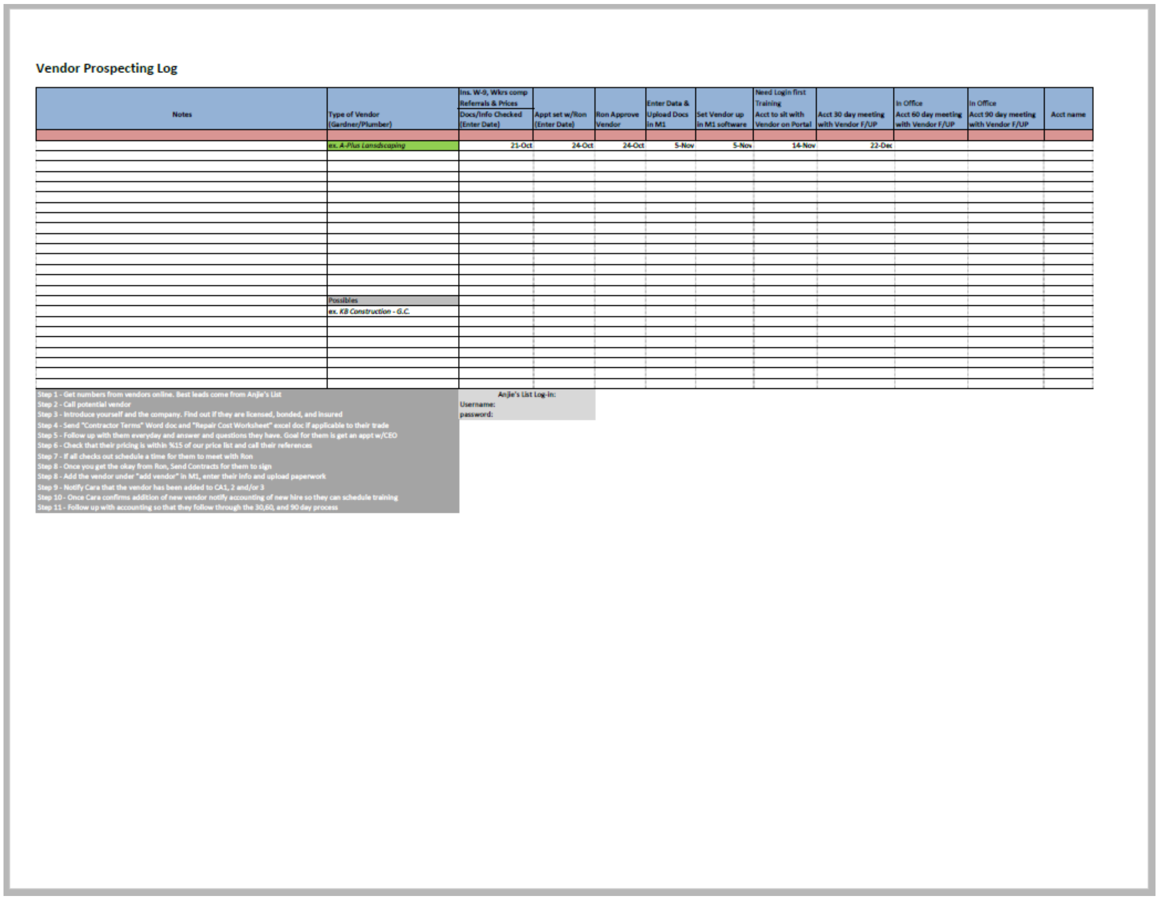
Checks & Balances

We recommend that you purge your work orders so your staff and vendors stay in compliance, the guidelines to follow are as follows:
Open Work Orders: All work orders over 60 days should be paid and closed
Open Estimates: All estimates should be completed within 30 days of receipt
Scheduling: All vendors should have scheduled an appointment with your resident within 7 days of receipt, otherwise they should notify you if unable to schedule with the resident.
Vendors Opening Statement of Work and Contacting Resident: All statement of work should be open within 24 business hours (Monday Through Friday).

Vendor Log

This is an Excel Spreadsheet that you can use to keep track of the vendors you have as well as any potential vendors you are looking at using

Vendor Log



Vendor Prospecting Log

Notes	Type of Vendor (Gardner/Plumber)	Ins. W-9, Wkrs comp Referrals & Prices Docs/Info Checked (Enter Date)	Appt set w/Ron (Enter Date)	Ron Approve Vendor	Enter Data & Upload Docs in M1	Set Vendor up in M1 software	Need Login first Training Acct to sit with Vendor on Portal	Acct 30 day meeting with Vendor F/UP	In Office Acct 60 day meeting with Vendor F/UP	In Office Acct 90 day meeting with Vendor F/UP	Acct name
	ex. A-Plus Lansdscaping	21-Oct	24-Oct	24-Oct	5-Nov	5-Nov	14-Nov	22-Dec			
	Possibles										
	ex. KB Construction - G.C.										

Step 1 - Get numbers from vendors online. Best leads come from Anjie's List
Step 2 - Call potential vendor
Step 3 - Introduce yourself and the company. Find out if they are licensed, bonded, and insured
Step 4 - Send "Contractor Terms" Word doc and "Repair Cost Worksheet" excel doc if applicable to their trade
Step 5 - Follow up with them everyday and answer and questions they have. Goal for them is get an appt w/CEO
Step 6 - Check that their pricing is within %15 of our price list and call their references
Step 7 - If all checks out schedule a time for them to meet with Ron
Step 8 - Once you get the okay from Ron, Send Contracts for them to sign
Step 8 - Add the vendor under "add vendor" in M1, enter their info and upload paperwork
Step 9 - Notify Cara that the vendor has been added to CA1, 2 and/or 3
Step 10 - Once Cara confirms addition of new vendor notify accounting of new hire so they can schedule training
Step 11 - Follow up with accounting so that they follow through the 30,60, and 90 day process

Anjie's List Log-in:
Username:
password:

[Click Here to Download MS Excel .xlsx file]

Step 1 - Get numbers from vendors online

Step 2 - Call potential vendor

Step 3 - Introduce yourself and the company. Find out if they are licensed, bonded, and insured

Step 4 - Send "Contractor Terms" and "Repair Cost Worksheet" (In M1 doc drop - vendor set up) if applicable to their trade

Step 5 - Follow up with them everyday and answer and questions they have

Step 6 - Check that their pricing is within 15% of our price list and call their references

Step 7 - If all checks out schedule a time for them to meet with them in office

Step 8 - Provide/Send vendor set up docs for them to sign

Step 9 - Add the vendor in M1, enter their info and upload paperwork

Step 10 - Follow the recommended 30,60 and 90 day process of worksheet

W9 Form

It is necessary to have a W9 Form filled out by every Vendor in order to issue a 1099 to them at the end of the year. This is required to properly report to the IRS and your State Tax Board, how much you paid to them throughout the year.

W9 Tax Form

Form **W-9**
(Rev. November 2005)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

Give form to the requester. Do not send to the IRS.

Print or type
See Specific Instructions on page 2.

Name (as shown on your income tax return)

Business name, if different from above

Check appropriate box: ☐ Individual/Sole proprietor ☐ Corporation ☐ Partnership ☐ Other ▶ ☐ Exempt from backup withholding

Address (number, street, and apt. or suite no.)

Requester's name and address (optional)

City, state, and ZIP code

List account number(s) here (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on Line 1 to avoid backup withholding. For individuals, this is your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

Note. If the account is in more than one name, see the chart on page 4 for guidelines on whose number to enter.

Social security number

or

Employer identification number

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
3. I am a U.S. person (including a U.S. resident alien).

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the Certification, but you must provide your correct TIN. (See the instructions on page 4.)

Sign Here Signature of U.S. person ▶ Date ▶

Purpose of Form

A person who is required to file an information return with the IRS, must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.

U.S. person. Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN to the person requesting it (the requester) and, when applicable, to:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
2. Certify that you are not subject to backup withholding, or
3. Claim exemption from backup withholding if you are a U.S. exempt payee.

In 3 above, if applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income.

Note. If a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

For federal tax purposes, you are considered a person if you are:

- An individual who is a citizen or resident of the United States,
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States, or
- Any estate (other than a foreign estate) or trust. See Regulations sections 301.7701-6(a) and 7(a) for additional information.

Special rules for partnerships. Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax on any foreign partners' share of income from such business. Further, in certain cases where a Form W-9 has not been received, a partnership is required to presume that a partner is a foreign person, and pay the withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid withholding on your share of partnership income.

The person who gives Form W-9 to the partnership for purposes of establishing its U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States is in the following cases:

- The U.S. owner of a disregarded entity and not the entity,

Cat. No. 10231X Form **W-9** (Rev. 11-2005)

Repair Cost Worksheets

These Repair Cost Worksheets are made available to you and suggested for each trade, in order to keep track of the property expenses that are specific to their specialty.

General Maintenance- Repair Cost Worksheet

GENERAL MAINTENANCE

Service Call Charge		(Includes 20 min to fix minor situations)
Labor Rate		

****PLEASE FILL IN HIGHLIGHTED YELLOW AREAS AND NOTE REQUIRED WARRANTIES ON ITEMS**

Description	Category	Brand	Quality	Labor Hrs	Labor Cost	FILL IN YOUR MATERIAL PRICE HERE	Total Cost Including Service Call	Wrty Mat	Wrty On Labor
A/C COND LINE PLUG	Air Cond/Heating		Deluxe	2 Hrs				120 Day	120 Day
BATHTUB/SHOWER ENCLOSURE	Plumbing	EL MUSTEE	ECONOMY	2 Hrs				1 Year	1 Year
24" or 36" STANDARD MINI BLINDS	Blinds	HOME DEPOT	ECONOMY	20 min				120 Day	120 Day
DISHWASHER (INC. SUPPLY LINES & HAUL OFF)	Appliances	may tag	ECONOMY	1 1/2Hrs				1 Year	1 Year
36" SOLID DOOR	Doors	Contractor	ECONOMY	1 Hr 15min				120 Day	120 Day
DOOR KNOB (ENTRY LOCK)	Locks	DEFIANT	ECONOMY	30 min				120 Day	120 Day
GATE (NEW) 36" - Wood	Fencing		ECONOMY	1 Hr				120 Day	120 Day
GARBAGE DISPOSAL HP 3/4	Plumbing	Badger	DELUXE	1 Hr				1 Year	1 Year
SMALL HALL OFF (Oil/refr/extra)	Trash			Incl				N/A	N/A
LIGHT FIXTURES - Ceiling mount	Lights		ECONOMY	15 min				1 Year	1 Year
FAN/BATHROOM	Plumbing	NUTONE	DELUXE	45 min				120 Day	120 Day
STOVE/ELECTRIC	Appliances	GE	ECONOMY	2 hrs				1 Year	1 Year
TOILET TANK	Plumbing	KOHLER	ECONOMY	1 Hr				1 Year	1 Year
6' VERT BLINDS w/valence cover	Blinds	GRANDWOOD	ECONOMY	1 Hr				120 Day	120 Day
WATER HEATER 40 GAL - 6 Year	Plumbing	A.C. Smith	Deluxe	2 Hrs				120 Day	120 Day

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Plumbing- Repair Cost Worksheet

Plumber Service Call Charge (Includes 20 min to fix minor situations)

Labor Rate

**PLEASE FILL IN HIGHLIGHTED YELLOW AREAS AND NOTE REQUIRED WARRANTIES ON ITEMS

Description	Category	Brand	Quality	Labor Hrs	Labor Cost	FILL IN YOUR MATERIAL PRICE HERE	Total Cost Including Service Call	Wrty Mat	Wrty On Labor
BATHTUB/SHOWER ENCLOSURE	Plumbing	EL MUSTEE	ECONOMY	2 Hrs				1 Year	1 Year
GARBAGE DISPOSAL HP 3/4	Plumbing	Badger	DELUXE	1 Hr				1 Year	1 Year
FAN/BATHROOM	Plumbing	NUTONE	DELUXE	45 min				120 Day	120 Day
TOILET TANK	Plumbing	KOHLER	ECONOMY	1 Hr				1 Year	1 Year
WATER HEATER 40 GAL - 6 Year	Plumbing	A.C. Smith	Deluxe	2 Hrs				120 Day	120 Day
SINK/KITCHEN	Plumbing	KOHLER	DELUXE	2 1/2 Hrs				1 Year	1 Year

Management One Licensed Operating System is providing you with the licensing rights to use this price list. You are not permitted to sell or share this list with anyone outside of our company. As the owner of your company, you are held legally responsible for any unauthorized use of the maintenance price list by your staff.

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Appliances- Repair Cost Worksheet

Plumber	Service Call Charge		(Includes 20 min to fix minor situations)
	Labor Rate		

**PLEASE FILL IN HIGHLIGHTED YELLOW AREAS AND NOTE REQUIRED WARRANTIES ON ITEMS

Description	Category	Brand	Quality	Labor Hrs	Labor Cost	FILL IN YOUR MATERIAL PRICE HERE	Total Cost Including Service Call	Wrty Mat	Wrty On Labor
Appliances									
DISHWASHER - incl Sup lines -haul away	Appliances	Maytag	ECONOMY	1hr 45 min				1 Year	1 Year
DISHWASHER - Supplies lines	Appliances		ECONOMY	1hr				1 Year	1 Year
DUCTED STOVE HOOD (30")	Appliances	NUTONE	ECONOMY	1hr				120 Day	120 Day
DUCTED STOVE HOOD (36")	Appliances	Maytag	ECONOMY	1hr				120 Day	120 Day
STOVE/ELECTRIC	Appliances	GE	ECONOMY	2 hrs 15min				1 Year	1 Year
STOVE/GAS (basic) both incl haul off	Appliances	GE	ECONOMY	2 hrs 15min				1 Year	1 Year
STOVE/GAS(incl wind/light/clock/h-off)	Appliances		DELUXE	2 hrs 15min				1 Year	1 Year
STOVE HOOD CORD	Appliances	WOODS	ECONOMY	20 min				N/A	N/A

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Roofing- Repair Cost Worksheet

Roofing

Service Call Charge		(Includes 20 min to fix minor situations)
Labor Rate		

**PLEASE FILL IN HIGHLIGHTED YELLOW AREAS AND NOTE REQUIRED WARRANTIES ON ITEMS

Description	Category	Brand	Quality	Labor Hrs	Labor Cost	FILL IN YOUR MATERIAL PRICE HERE	Total Cost Including Service Call	Wrty Mat	Wrty On Labor
ROOF									
Roof Repairs 10x4 or 40 sq. ft repair									
Roof Repairs 15x20 or 300 sq. ft repair									
New Roofs- Depends on type and pitch of roof complete shingle minor pitches									
New Roofs- Depends on type and pitch of roof complete shingle major pitches									
Emergency Calls to stop leak includes labor and material									

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[Click Here to Download MS Excel .xlsx file]

Landscaper- Repair Cost Worksheet

Landscaper Service Call Charge (Includes 20 min to fix minor situations)

Labor Rate

**PLEASE FILL IN HIGHLIGHTED YELLOW AREAS AND NOTE REQUIRED WARRANTIES ON ITEMS

Description	Category	Brand	Quality	Labor Hrs	Labor Cost	FILL IN YOUR MATERIAL PRICE HERE	Total Cost Including Service Call	Wrty Mat	Wrty On Labor
SPRINKLERS SYSTEM - RESET TIMERS	Sprinklers Sys			15 min				N/A	N/A
HEADS:									
SMALL/ REGULAR	Sprinklers Sys	ORBIT	ECONOMY	15 min				120 Day	120 Day
POP-UPS RAINBIRD	Sprinklers Sys		DELUXE	15 min				120 Day	120 Day
HOSE BIB:									
SWEATED -C	Sprinklers Sys	NIBCO	ECONOMY	45 min				120 Day	120 Day
TIMERS:									
4 STATION- COMPUTER -	Sprinklers Sys	TORO	ECONOMY	45 min				120 Day	120 Day
4 STATION- MANUAL	Sprinklers Sys	LAWN GENIE	ECONOMY	45 min				1 Year	1 Year
6 STATION-MANUAL	Sprinklers Sys	LAWN GENIE	ECONOMY	45 min				1 Year	1 Year
Landscape Rock w/weed barrier (Per Sq. Foot)	Landscaping			15min				N/A	N/A

Management One Licensed Operating System is providing you with the licensing rights to use this price list. You are not permitted to sell or share this list with anyone outside of our company. As the owner of your company, you are held legally responsible for any unauthorized use of the maintenance price list by your staff.

[Click Here to Download MS Excel .xlsx]

Contractor Sign-up Paperwork

Contractor Terms

Contractor Agreement Terms

What [COMPANY NAME] Offers:

- Guaranteed payment whether the owner pays or not.
- A majority of the time we pay out weekly.
- Consistent Work Orders.
- We offer fast and convenient on-line invoicing through our system. Virtually no time spent invoicing for you
- [COMPANY NAME] does not mark up prices.

What [COMPANY NAME] Requires of All Contractors Hired:

- Prior to hiring you will need to agree go off our price list if item is listed.
- 5% monthly contribution to marketing fund ([COMPANY NAME] contributes 5% as well – Questions can be thoroughly answered during meeting with CEO)
- Use M1 vendor portal for all work orders, estimates, and invoicing
- Contractor must attempt contact of a resident within 4 hours of receiving a work order
- Submit before and after photos for each repair. (Does not apply to property rehabs)

If you are interested in interviewing with [COMPANY NAME] for possible hire, you must submit the forms/information listed below prior to us scheduling an interview. Once we have received all documentation and it is approved we will contact you to set up an interview at our office.

SUBMIT ALL COPIES TO **[COMPANY EMAIL]**

1. W-9 Form
2. Business License
3. Contractor License and/or Workers Compensation Insurance (If applicable)
4. Fill out in detail your repair costs on attached worksheet and return unless disregarded by [COMPANY CONTACT] in e-mail
   (E-mail [COMPANY CONTACT] at [COMPANY EMAIL] for the worksheet or if you have any questions on it – Worksheet does not apply to Roofers, Locksmiths, Pest control, or Pool maintenance)
5. 3 references we can contact (Relatives are not references)
   a. ______________________________
   b. ______________________________
   c. ______________________________
6. Email Address:______________________________
7. Liability Insurance with Management added as Certificate Holder (The information below must be on the certificate by the time you begin receiving work orders from [COMPANY] but not prior to meeting with CEO)

[COMPANY NAME]
[COMPANY ADDRESS]

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Subcontractor Agreement

Subcontractor Agreement

I ____agree to the following conditions and terms in being a subcontractor for [COMPANY NAME]:

1. I will call in for approval on any repair exceeding $250.00.
2. If approval is not given, I will not complete the work and bill over $250.00. If I do the work then I understand I will only be paid up to $250.00.
3. I agree to respond to [COMPANY NAME] if called or paged within 30 minutes.
4. I agree to submit my billing through [COMPANY NAME]'s Vendor Portal. (Additional training will be given)
5. I agree to give an itemized breakdown on my billing to include the labor, material and warranties on each repair completed.
6. I agree to submit al invoices within 60 days from the date I receive the work order. If not received, I understand that I "**will not**" be paid on these invoices. (If extenuating circumstances, [COMPANY NAME] to approve all extensions)
7. I agree to submit all estimates within 72 hours of going out on the job through the Vendor Portal.
8. I agree to fixed pricing for one year and make changes on the 1st of each year and to give [COMPANY NAME] any revisions I may have to add to [COMPANY NAME]'s price list. [COMPANY NAME]'s price list is to be used. However, we understand there may be some variables.
9. I agree to have bills in for weekly payment in [COMPANY NAME]'s office each Monday by noon and by the 26th of each month. This is to ensure payment each week and the 1st of each month.
10. I agree to call the tenant within 4 business hours of receiving the emailed work order to set an appointment and show up on time for that appointment or call the tenant if running late.
11. It is agreed that [COMPANY NAME] will make good on any invoice that has not been paid within 60 days of receipt due to lack of funds in an owner's account.
12. It is agreed that in the event services are ended by either party that [COMPANY NAME] will hold 5% of the gross earned from the previous year and/or 5% from year to date (whichever is greater) for a period of 6 months to ensure all warranty items are covered.
13. I agree to have company identification on all shirts, uniforms, etc. when arriving at any [COMPANY NAME] property, whether occupied or vacant.

______________________________ ____________________
Contractor Date

______________________________ ____________________
[COMPANY NAME] Date

[COMPANY NAME]
Subcontractor Manual

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Price List Agreement

Proprietary Price List Agreement

_____________________________, is confirming receipt of a copy of the price list from [COMPANY NAME]. It is agreed that this list is property of [COMPANY NAME] and may not be duplicated, copied or sold by your or anyone you know or who works for you or does subcontracting work for you. It's take decades to put this list together with thousands of hours and dollars to create it. Such actions would be considered breach of contract and would be considered grounds for terminating the relationship and grounds to recoup any losses [COMPANY NAME] would have.

X _____________________________ X ________________
Contractor Date

X _____________________________ X ________________
[COMPANY NAME] Date

[COMPANY NAME]
Subcontractor Manual

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Network Marketing Agreement

[COMPANY NAME] and Contractor Network Marketing Agreement

This agreement is entered into between [COMPANY NAME] and______________________, (Herein called "Contractor") for the purpose of Network Marketing. The Contractor agrees to pay 5% of the prior months gross work orders to the Network marketing Fund set up and managed by [COMPANY NAME]. These funds are to be paid by the 15th and received no later than the 20th for the prior month's business. This is calculated from RPM accounting report that will be sent to you on the 5th of each month. Your checks will be made payable to [COMPANY NAME] Network Marketing Fund.

[COMPANY NAME] also agrees to contribute 5% of their gross monthly management fees under the same terms and conditions as stated above.

It is agreed by all parties that [COMPANY NAME] will implement and manage the Network Marketing Plan. Input from contractors on how the funds are invested is welcomed. The purpose behind this Network Marketing program is to increase business for all parties. By increasing the number of properties at [COMPANY NAME], this will automatically increase each contractor's business opportunity, however it does not guarantee that it will create more business.

It is agreed that this method is fair and equitable way to calculate what each contractor contributes. Contractor agrees not inflate prices to cover this cost but may increase prices as they would normally to cover increase in materials and labor cost in a normal course of business. Price increases are to be submitted in writing to [COMPANY NAME] for approval.

If a contractor is terminated or quits doing business with [COMPANY NAME], contractor releases [COMPANY NAME] from any and all obligations for past contributions to the marketing fund and for any refunds or prior contributions.

It is understood that this fund was created so all parties may take advantage of a marketing plan utilizing several different mediums that would not have been financially feasible individually by [COMPANY NAME] or any single contractor.

______________________________ ______________
Contractor Date

______________________________ ______________
[COMPANY NAME] Date

[COMPANY NAME]
Subcontractor Manual

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Vendor Portal Training

Vendor Portal Overview

We recommend you review each Article and watch each of the Training Videos so you are well versed on how to set up and train your vendors.

The vendors also have the training on their portal to review before they start and to assist them with questions they may have while learning the portal.
Vendor Portal Overview Click here to Watch Video Tutorial

Helpful Articles & Videos explaining the Vendor Portal

Article & Video Links

Work Order Management
Click here to Watch Video Tutorial

Filling Out the Statement of Work Details
Click here to Watch Video Tutorial

Adding a Before or After Photo/File
Click here to Watch Video Tutorial

To Review an Item
Click here to Watch Video Tutorial

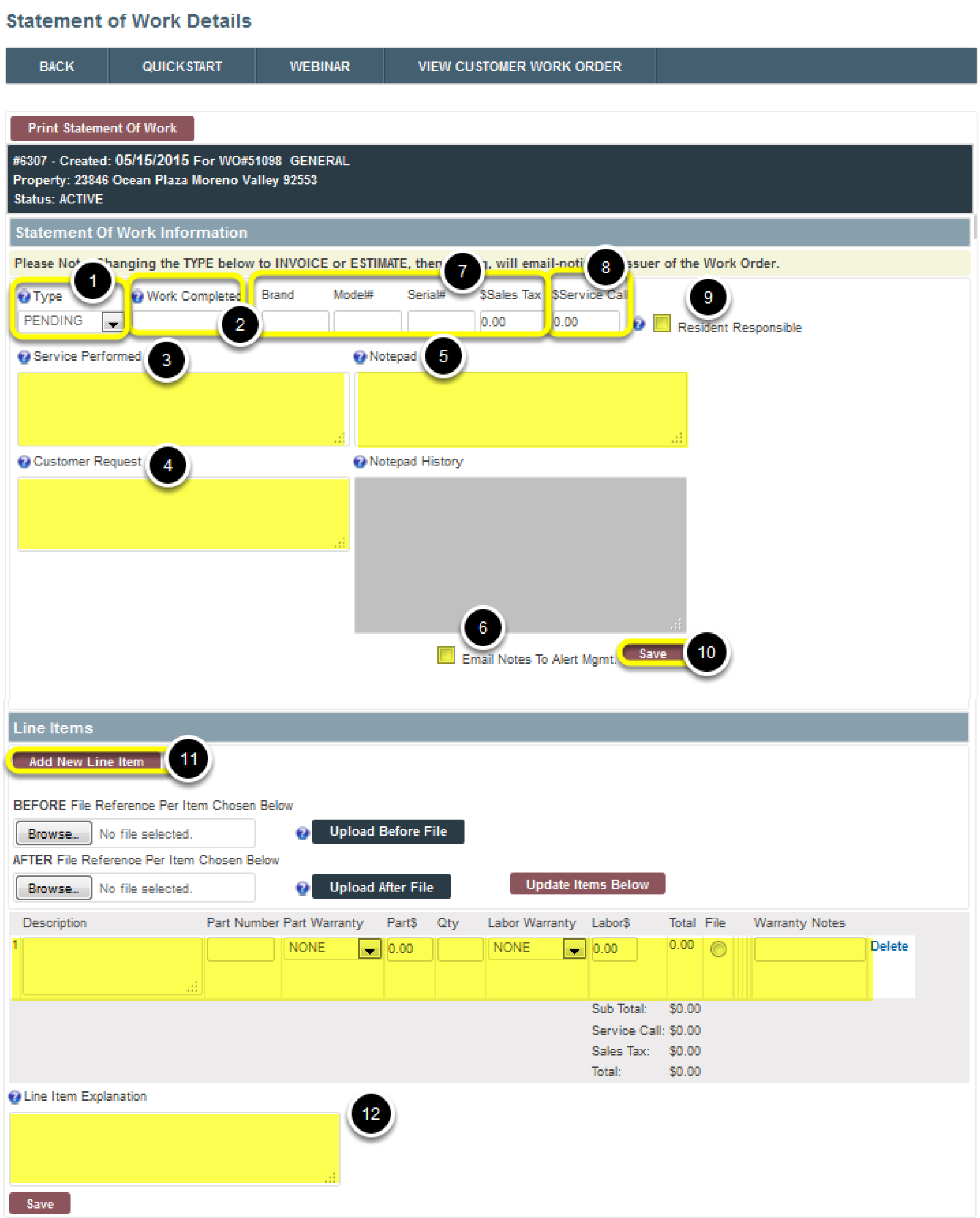
Estimate Process
Click here to Watch Video Tutorial

Recurring Work Orders
Click here to Watch Video Tutorial

VP- Statement of Work Details

[Click here to Watch Video Tutorial]

Filling out the Statement of Work Details



From **Statement of Work Details** Screen:

Statement of Work Information

1. Type:

- The statement will auto change to a status of **Pending**

Note: (Do not change the status to Estimate/Invoice until you are ready to submit to the office)

2. Work Completed

- Enter the date the work was completed

3. Service Performed:

- Enter a brief description or line item of the work performed (either is acceptable). If there is too much to list, type a notation to "see the line items below"

4. Customer Request:

- Enter an abbreviated account of what was requested or you can cut and paste each item from the line items section below.

5. Notepad:

- Used to store Notes as needed, to track the work order status.

6. Email notes to Alert Mgmt:

- Checkmark. if needed, and an email will be sent to the person who issued the work order

7. Brand, Model and Serial #, Sales Tax are available if needed

8. Service call to be entered separately from line item charges if applicable

9. If a Resident charge, click on the **Resident Responsible** box

10. Click **SAVE** before moving on.

Line items:

11. Click on **Add a New Line Item** (a new Row will appear)

- Enter the item “replaced/work performed” in the description box
- Select a Part Warranty from the drop down (if applicable)
- Enter the total price of the part
- Enter the quantity of the parts
- Enter the Labor Warranty from the drop down (if applicable)
- Enter the total labor cost

(if the item being charged is a flat price, enter the total cost of the item in the Labor cost box)

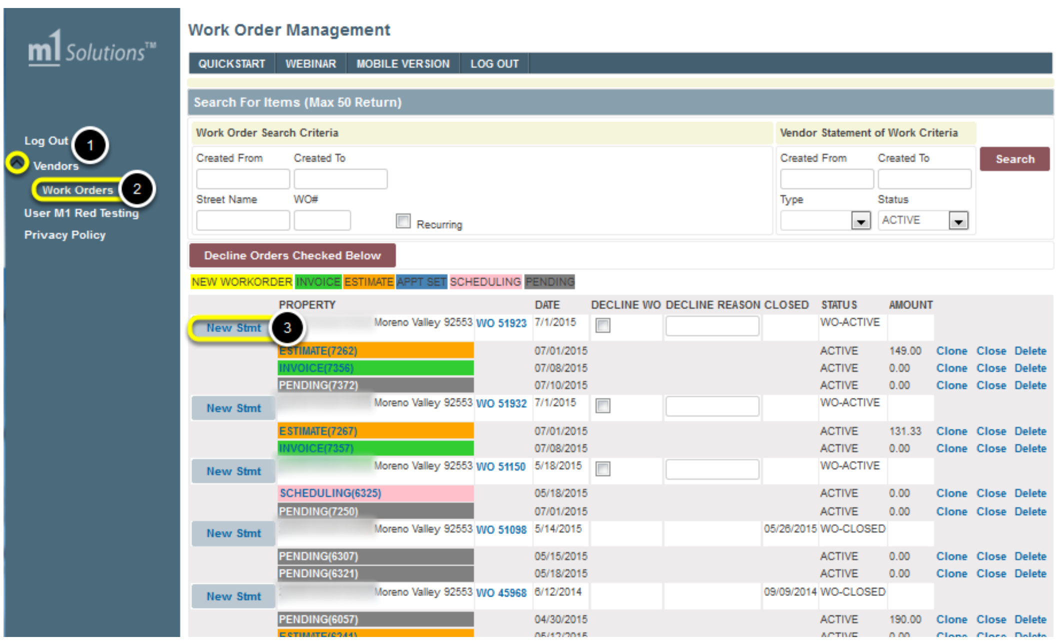
12. Line item Explanation available if you need explain more detail of particular line item(s)

VP-Work Order Management

[Click here to Watch Video Tutorial]
After Logging into your Vendor Portal
From the Tree View:

1. Expand **Vendors**
2. Select **Work Orders** (*New items will appear in yellow*)
3. Select **New Stmt** to create a new Statement of Work (The statement will auto change to a status of **Pending**)

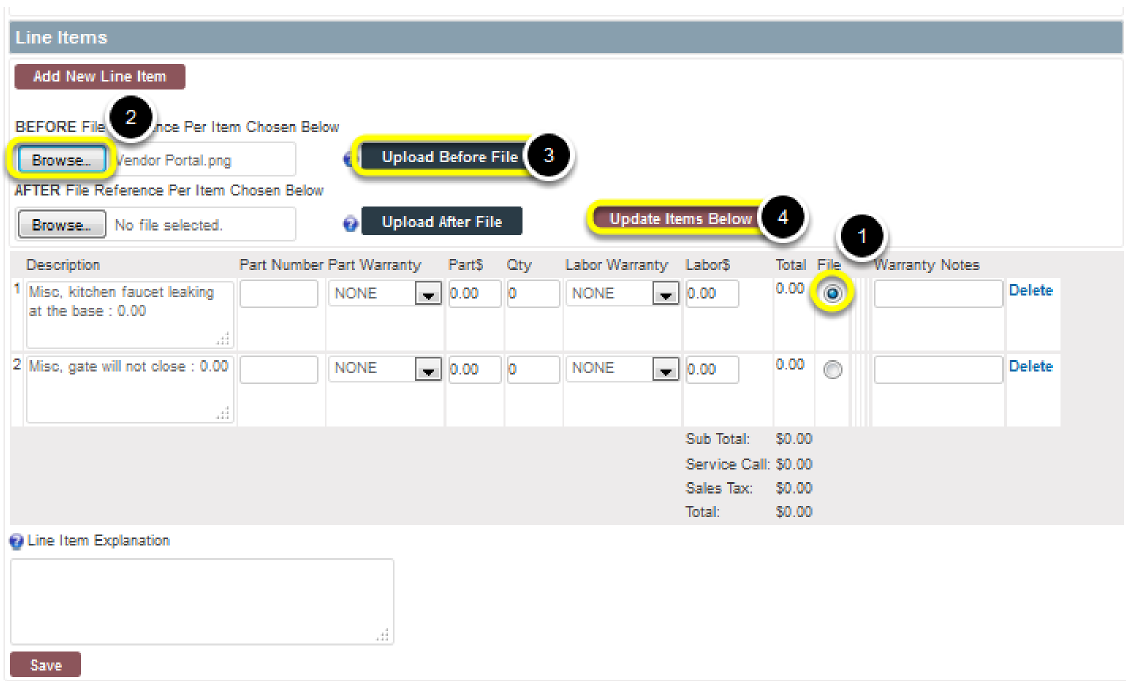
Vendor Portal / Work Order Management



VP-Adding a Before or After photo/file

[Click here to Watch Video Tutorial]
From **Statement of Work Details** Screen:
1. Click on the **File** checkbox for the **Line Item** that you wish to load the photo on
2. Then browse the appropriate **BEFORE** or **AFTER** box above
3. Then click the **UPLOAD** button.
4. Click **Update Items Below** to save all work

Adding a Before or After photo/file to a Work Detail



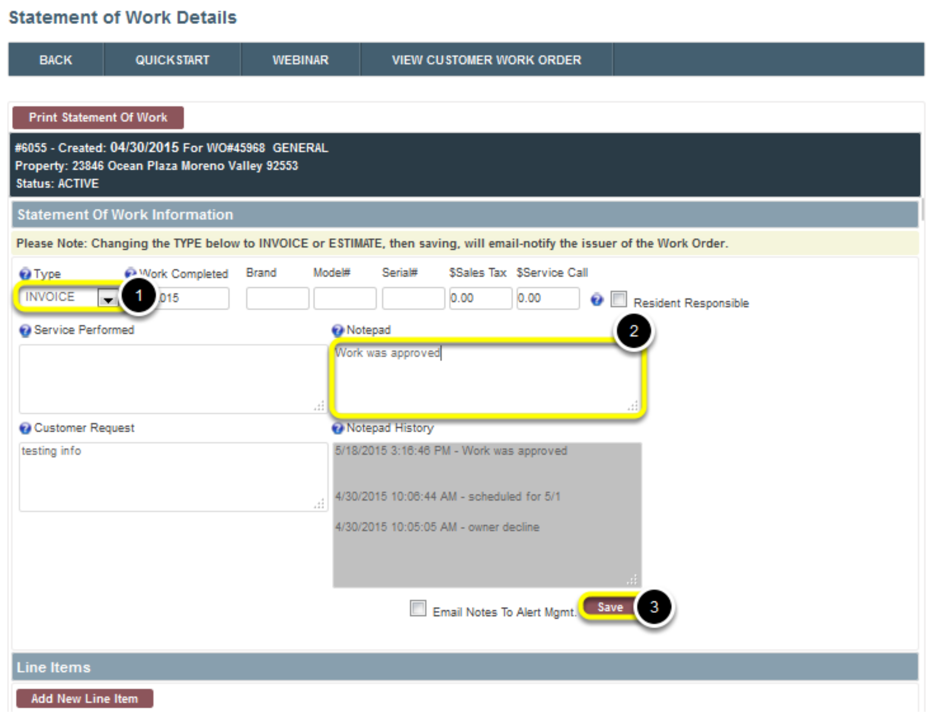
VP-Estimate Process

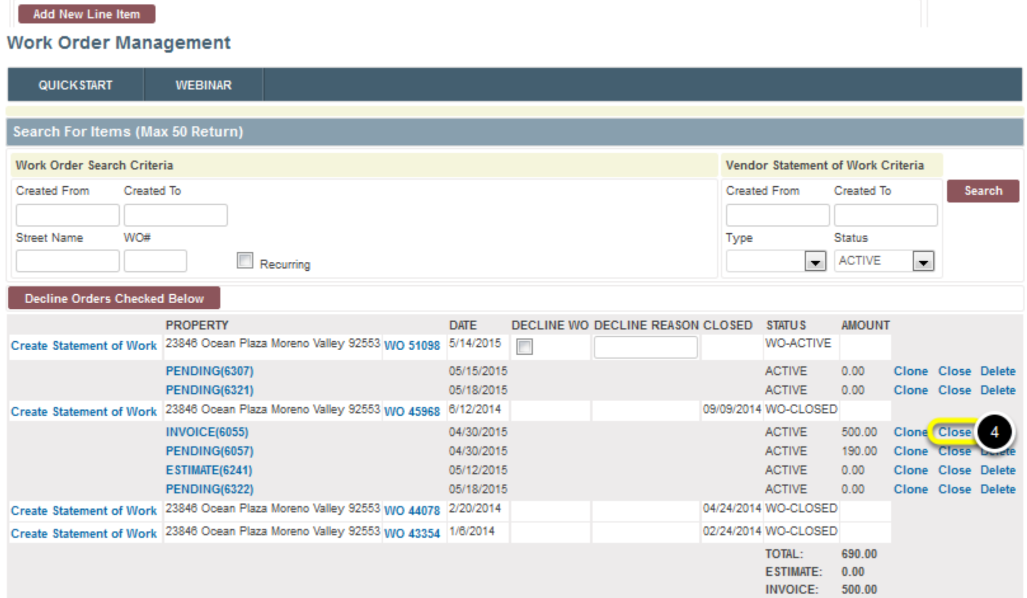
Click here to Watch Video Tutorial
From **Statement of Work Details** Screen:
If approval is given on the estimate, you may do the following:
1. Convert the **Estimate** to an **Invoice** to avoid having to type again

If you do not convert the Estimate to an Invoice,
2. Update the **Notepad History** by typing "work was approved" in the **Notepad**
3. Then click **SAVE** so it shows in **Notepad History**
4. Close out the estimate by clicking **CLOSE** from the main screen. (This will keep track of the estimate, but will not show as an outstanding estimate.)

If the estimate is declined by the owner
2. Update the **Notepad History** by typing Notes in the **Notepad**
3. Then click **SAVE** so it shows in **Notepad History**
4. Then click **CLOSE** from the main screen.

Estimate Process





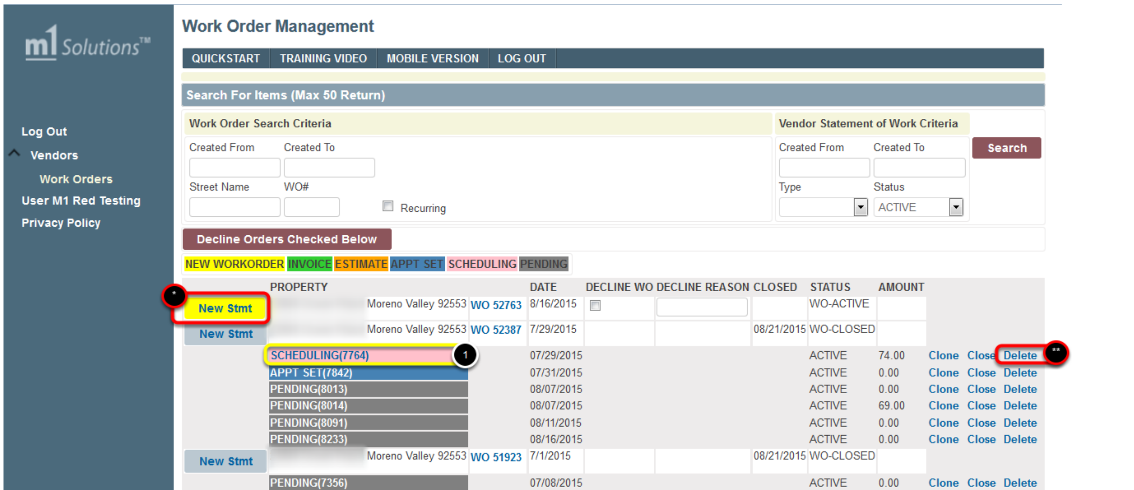
VP-To Review an Item

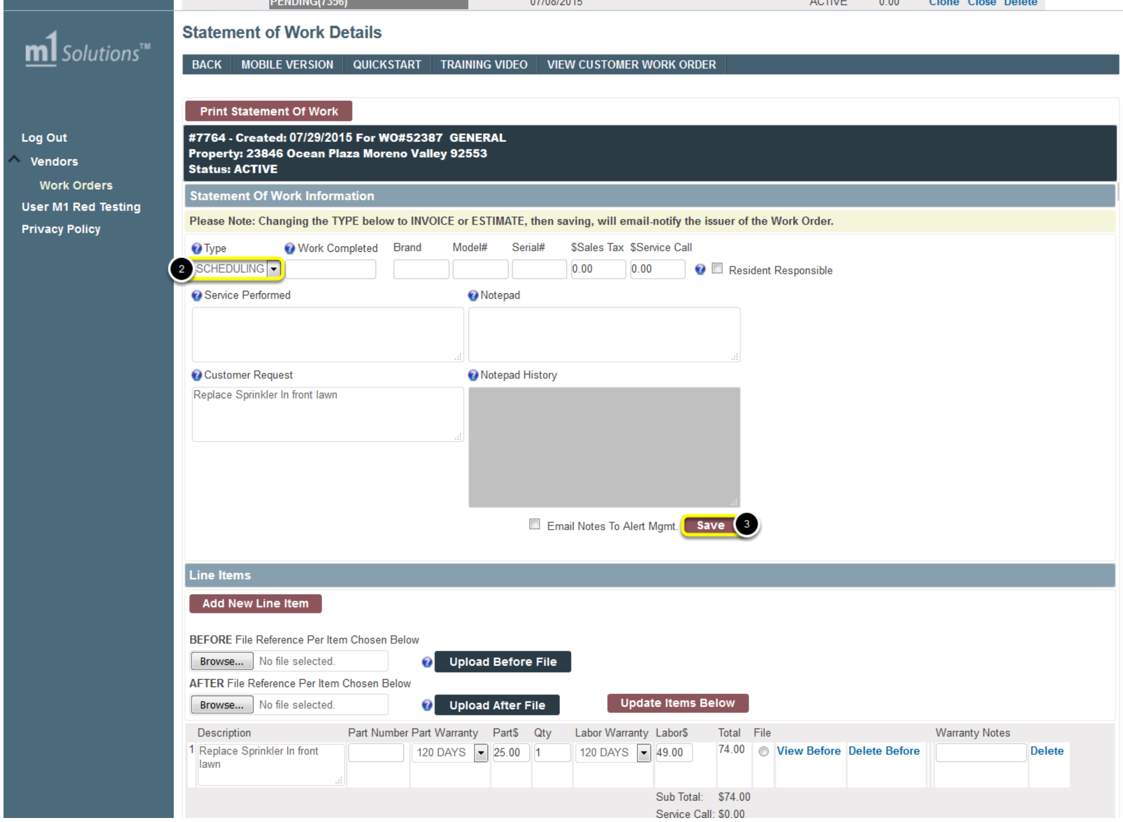
Click here to Watch Video Tutorial
From the **Work Order Management** view:
If an item has already been started,

1. Click on the **Statement Status Link** below the property address (ex. **Pending**, **Scheduling, Appt Set, Estimate**, or **Invoice**,)
2. Once the **Statement of Work** is updated, change the statement **Type** from the Drop Down menu.
3. Then click **SAVE**.

Note:
*If you click on **New Stmt**, a new statement will be created and you will find duplicate statements.
Should this occur, you may click **DELETE, to the right to remove any unwanted statements.

Review an Item in Work Order Management





VP-Recurring Work Orders

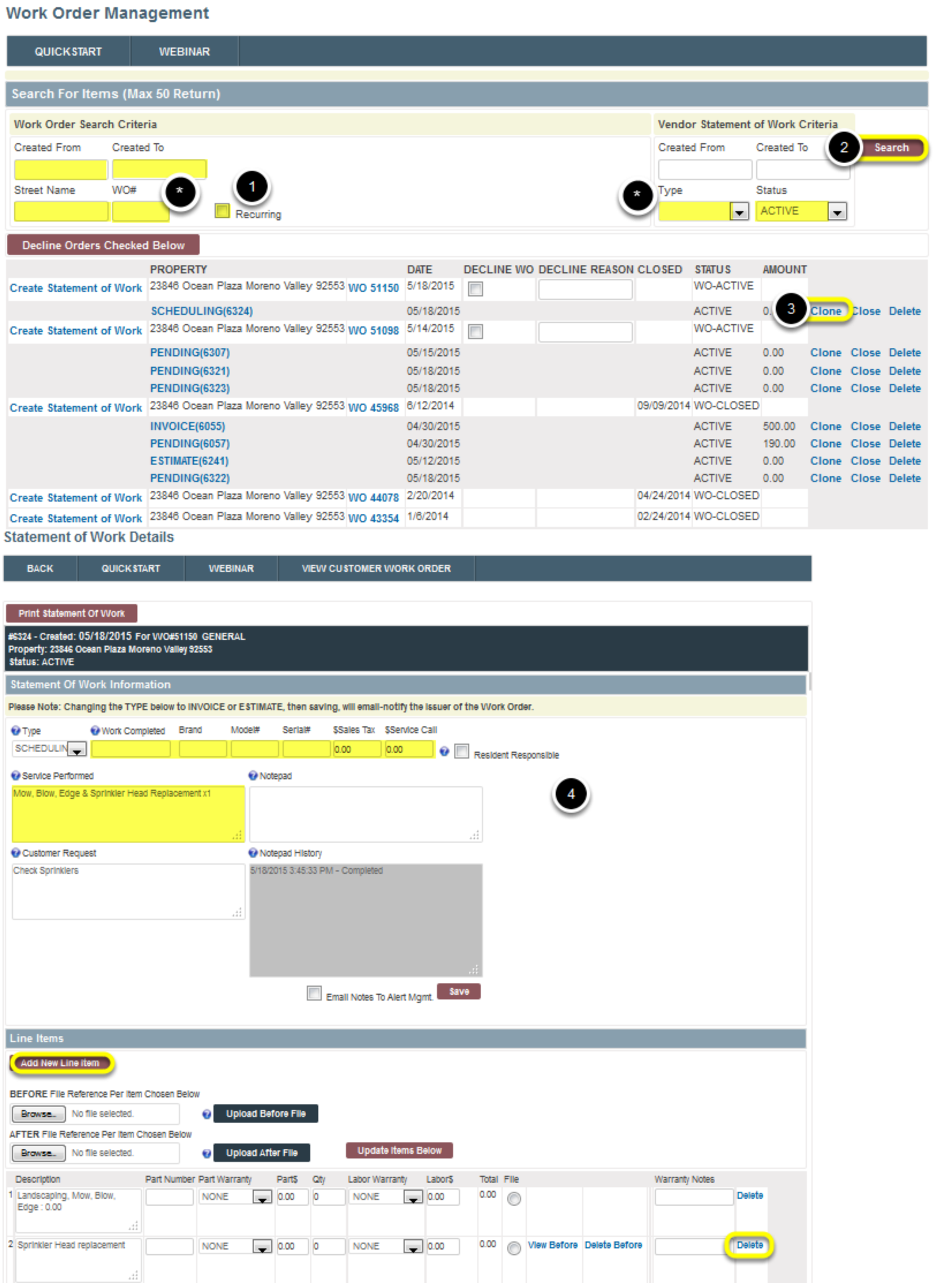
Click here to Watch Video Tutorial
This is mainly used for monthly recurring services such as lawn and pool services.
From the **Work Order Management** view:

1. Click the box **Recurring**
2. Then click **SEARCH**
3. To auto-duplicate to submit for the new month's billing, click the **Clone** link to the right
4. **Edit** and **add/delete** any items that apply for that current month.

Note:
All recurring work orders will appear along with the last invoice that was submitted.
***Search Criteria**
If you need to search for a particular work order you may do so by...

- *Date Range
- *Street Name
- *WO#
- or by the *Statement of Work Type.

Recurring Work Orders



Training Process Videos

Vendor Portal Overview

[Click Here to View a Step-by-Step Tutorial Article]

Video - Vendor Portal Overview

[Click Here to Watch a Step-by-Step Tutorial Video]

Vendor Portal Touchpoints

Vendor Portal Touchpoints - Video

[Click Here to Watch a Step-by-Step Tutorial Video]

How to Add a New Vendor

How to Add a New Vendor and Issue Portal Access in the M1 Solutions Software
Click Here to View a Step-by-Step Tutorial Article

How to Add a New Vendor - Video

Click Here to Watch a Step-by-Step Tutorial Video

VP-Work Order Management

Work Order Management in the Vendor Portal of the M1 Solutions Software
[Click Here to View a Step-by-Step Tutorial Article]

VP Work Order Management -video

[Click Here to Watch a Step-by-Step Tutorial Video]

VP-Adding Photo Files

Learn How to Add a Before or After Photo File to a Work Order in the Vendor Portal of the M1 Solutions Software
[Click Here to View a Step-by-Step Tutorial Article]

VP- Adding Photo Files - video

[Click Here to Watch a Step-by-Step Tutorial Video]

VP- How to Review an Item

How to Review an Item for a Work Order in the Vendor Portal of the M1 Solutions Software
[Click Here to View a Step-by-Step Tutorial Article]

VP How to Review an Item - Video

[Click Here to Watch a Step-by-Step Tutorial Video]

VP- Recurring Work Orders

How to Manage Recurring Work Orders in the Vendor Portal of the M1 Solutions Software
[Click Here to View a Step-by-Step Tutorial Article]

VP Recurring Work Orders - Video

[Click Here to Watch a Step-by-Step Tutorial Video]

VP- Estimate Process

How to Update a Work Order as an Estimate Statement in the Vendor Portal of the M1 Solutions Software
[Click Here to View a Step-by-Step Tutorial Article]

VP-Estimate Process - Video

[Click Here to Watch a Step-by-Step Tutorial Video]

VP- Filling Out the Statement of Work Detail

How to fill out the Statement of Work Detail Page for a Work Order in the Vendor Portal of the M1 Solutions Software
Click Here to View a Step-by-Step Tutorial Article

VP How to Fill Out the Statement of Work Details - Video

Click Here to Watch a Step-by-Step Tutorial Video