



Facilgo Training Guide for Suppliers

Created by FirstKey Homes

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Introduction

Thank you for being a part of the Facilgo Supplier Network. You play a key role in servicing FirstKey Homes (FKH). The Facilgo platform helps FKH centralize and streamline service operations and maintain outstanding service to residents. Facilgo provides operational efficiencies to suppliers in the following areas:

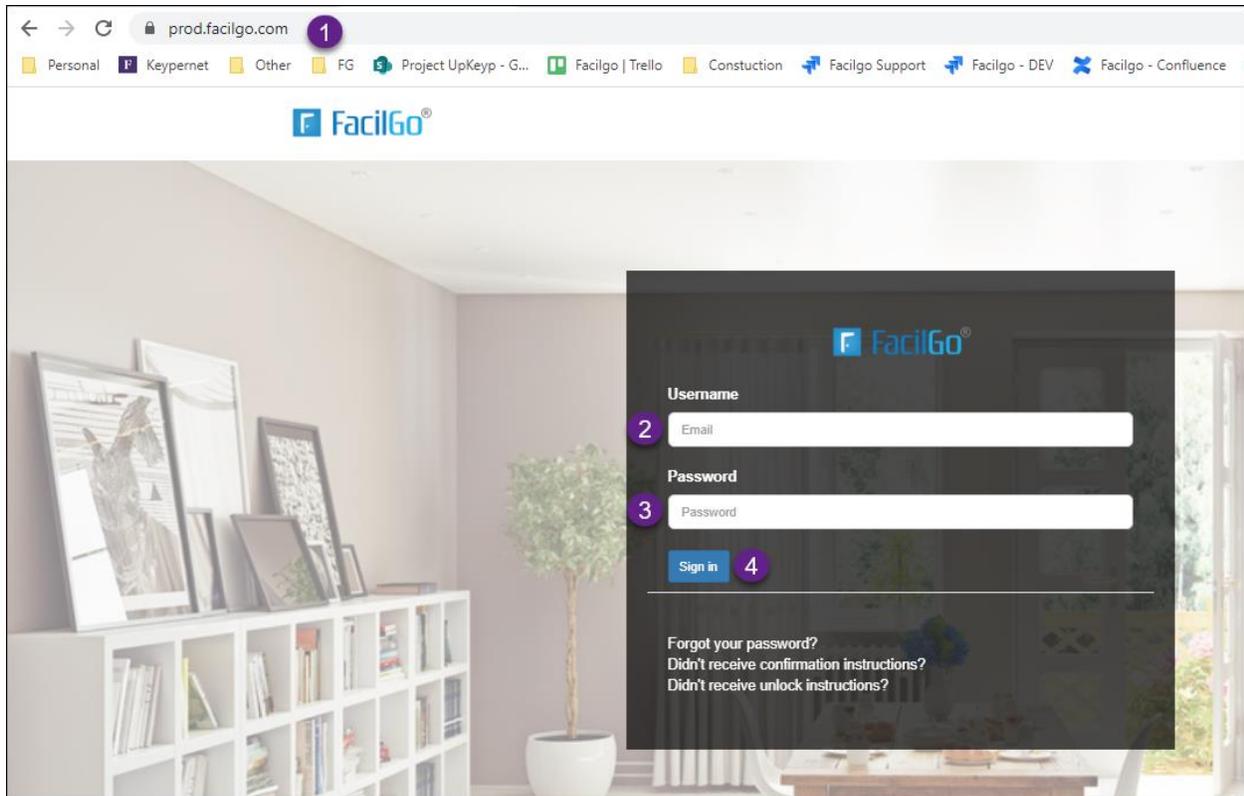
- Single channel to
 - receive client work orders as well as quote requests for new business opportunities.
 - communicate through Customer Messaging
 - track resident contact
 - submit Quotes
- Mobile application to view work orders and orders with the ability to take pictures and add comments.
- Efficient and easy online invoicing eliminating late or lost invoices.

Key Words

- **SLA** - Service Level Agreement - A service-level agreement (SLA) sets the expectations between the service provider and the customer and describes the products or services to be delivered, the single point of contact for end user problems, and the metrics by which the effectiveness of the process is monitored and approved.
- **Work Order** - Work Orders are meant to describe what the issue is and what has/needs to be done. It is not a financial transaction.
- **Order** – written approval to engage in a commercial transaction for specific products or services.
- **Quote Request** – FKH does not know the price and is requesting the supplier to provide a quote. Supplier is required to provide a Scope of Work
- **Quote** - a proposal that explains the price and scope of work to resolve the work order.
- **Invoice** - an itemized list that records the products or services you provided to FKH; the total amount due.
- **Expected Useful Life or "EUL"** - is the average amount of time in years that an item, component, or system (in a building or property improvement) is estimated to function when installed new and assuming routine maintenance is practiced.
- **Total** – The Total Approved Order amount equals the Not to Exceed (NTE) which is the max allowance of spend up for specific work Scope of Work / order. The supplier commitments and expenditures for this Scope of Work are limited to this value.
- **Diagnostic fee** - fee for figuring out the “why” behind a problem. A comprehensive Diagnostic Report (Pictures and Root cause) must be provided to FKH to be considered for fee payment.
- **Trip Charge** – sometimes called service call fees, this charge is the initial rate for showing up to a property. FKH does not pay for this.
- **Stabilization** – The Act of stabilizing an asset impacted by fire, active flood, interior uncontained sewage, gas leak, security issue and immediate life/safety events or bare minimum living conditions.
- **First Contact Resolution (FCR)** - resident service requests that are resolved during the first interaction.
- **FKH** – FirstKey Homes
- **Scope of Work of Work (SOW)** - is the work to be performed. The SOW should contain any milestones, reports, deliverables, and end products that are expected to be provided by the supplier. The SOW should also contain a timeline for all deliverables.
- **Completion Notes** – Comprehensive notes detailing (findings, Scope of Work, root cause, and solution).

1.0 FacilGo Supplier Login

1. Visit <https://prod.facilgo.com/>
2. Enter Username
3. Enter Password
4. Click the **Sign In** button



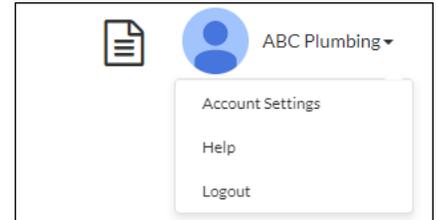
Please ensure you use Google Chrome as your Web browser. The FacilGo application works best in Google Chrome.

2.0: Navigation

Inside FacilGo Web, you will arrive at a home “dashboard” page. In this section, we will go over some basic navigation inside Facilgo.

2.1: Account Settings

In the upper righthand part of the navigation bar, you can click on the username to access a dropdown menu with the options to access your account settings (update company settings & set up email notifications) & logout of Facilgo.

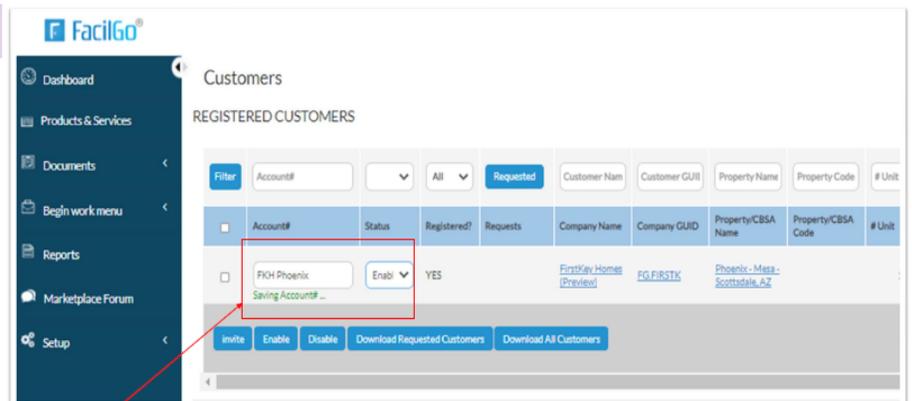
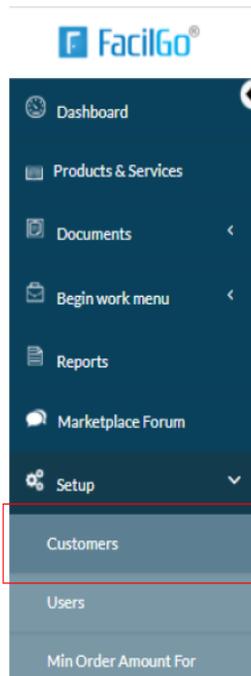


2.2: Accepting Service Areas

After you register your company with Facilgo, FirstKey Homes will assign the areas we believe you to service. You must accept these service areas for FirstKey Homes to assign you work within that area.

Enable Service Area (Market level)

On the left-hand menu, click the *Setup* link to expand the setup menu options and click *Customers*



Once FirstKey Homes adds you to a market it will appear as a line item on this page

Enter an Account Number/Name for the market. You can set this value to anything you like, such as a unique identifier from your accounting system

From the *Status* drop-down menu next to *Account#*, select “Enabled”. This will pop up a list of zip codes associated with the service areas within the market you have been assigned

Confirm Service Area Zip Codes



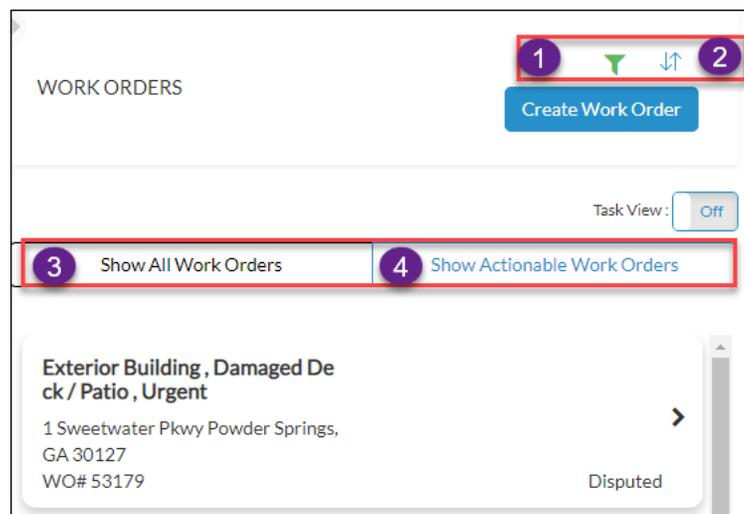
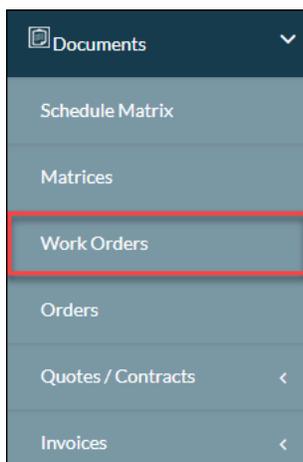
A list of zip codes contained in the assigned service area is auto-populated

If there are any zip codes that you know you do not service, you may remove them from this list by clicking the 'X' next to the zip code

When you are comfortable with the zip codes included, click the Save button

2.3: Search for a work order (& other document)

Use the sidebar menu under **Documents** to access work orders, orders, quotes, quote request and invoices. Once you click on a document type, for example **Work Orders**, you will be directed to the work order list view.



On the work order list view screen, you can do the following actions:

1. Click on the filter icon which allows you to search by property, WO #, WO status, created date, ect.
2. Click on the arrows to modify the sort of how the work orders appear (last modified date / created date)
3. Click on **Show All Work Orders** to show all work orders in the WO list view (including canceled and completed)
4. Click on the **Show Actionable Work Orders** to show only work orders that are open and requiring supplier action

**Quick Tip to quickly navigate to a work order using the work order number**

While you are on the work order screen, you can copy and paste the work order number at the end of the URL search bar



3.0: Work Order Information

At FirstKey Homes, you will receive one work order for every issue at a property. When reviewing the work order, you will notice that the work order is broken out into several sections. We will look at each section of the work order below.

3.1: Work Order Header Fields

The upper part of the work order is known as the work order header. Although it contains several fields, we will focus on the most important ones.

1. **Work Order Title** (formatted as: *Work Order Category, Subcategory, Priority*)
2. **Property Address**
3. **Same Location Work Orders** (View work order history at the property)
4. **Work Order Status** (Refer to [3.8: Work Order Status Definitions](#))
5. **Work Order #**
6. **Resident** (Click on the resident's name to view contact information)
7. **Priority** of the Work Order (Refer to [4.0 Service Level Agreement](#))
8. **Scheduled Start Date/Time** (Date supplier will be onsite)



1 HVAC , Thermostat , Urgent

[Same Location Work Order](#)

3

ABC Plumbing - 100 Howard Ave Cartersville, GA 30121

100 Howard Ave
Cartersville, GA, 30121
● Completed

2

4

WO DATE: 01/12/2023

CATEGORY: HVAC

WOSERVICE: Y

WO#: **5** 51930

UNIT#: [91009103](#)

RESIDENT: **6** [McDonald Knights](#)

ENTRY NOTES:

REASON:

REQUIRE PHOTO: N

COMPLETED AT: 01/18/2023 08:47 am

SCHEDULED START DATE/TIME: 01/17/2023 08:00 am **8**

DUE DATE: 01/17/2023

SUBCATEGORY: Thermostat

SUPPLIER: ABC Plumbing(Registered)

MTCREQID:

ASSOCIATED FIXED ASSET:

PRIORITY: **7** Urgent

RESOLUTION:

PROJECT:

SCHEDULED END DATE/TIME: 01/17/2023 12:00 pm

[▼ more](#)

3.2: Line-Item Fields

The line-item fields have additional information on the issue reported by the resident.

1. **Line-item name** (formatted as: *Work Order Category, Subcategory, Priority*)
2. **Instructions:** This is the problem description of this issue, usually provided by the resident
3. **Comments:** This field is for completion notes by the supplier and is required before completing the work order. Scope of Work Summary is required here

Show By Grouped Room Names Yes Show More Line Item Info No

DETAILS TIME & \$\$

IMAGES	DOCUMENTS	ITEM	UNIT	INSTRUCTIONS	COMMENTS	CB AMOUNT
1. Undefined Room						
5		HVAC, Thermostat, Urgent	#91009103	AC is not cooling	Issue: Thermostat stopped working and had Change battery icon. Scope of Work: Diagnose issue remove and replace damaged blower motor and capacitor, remove and replace burnt electrical wires	0.0

3.3: Related Documents

The related documents section shows a high-level view of the work orders associated documents. There may be additional information from the market team on the scope of work notated in the item field.

Related Documents

ORDER

SKU	ITEM	QTY	PRICE	EXT. PRICE	UOM	INVC'D	ISSUE EXIST
	Check condition of AC	1	\$350.00	\$350.00	EA		N
GRAND TOTAL:			\$350.00				

3.4: Next Step Table

The Next Step Table section provides an overview of all the reference documents linked to a work order (e.g., quote requests, quotes, orders, and invoices). If there are child work orders related, it will be shown on the table.

1. The rows highlighted in blue on the table represent the document you are currently reviewing.
2. **Total:** The total represents the Not to Exceed (NTE) total. The NTE is the max allowance of spend for the specific work order /scope of work. The supplier's scope of work is limited to this value. If the cost exceeds this amount, additional approval is required (see section [6.0 Request Additional Funds](#))
3. **Action:** Available next actions for the supplier are located here so that all actions can be performed on the work order rather than in the specific document

PARENT WO	CHILD WO	NEXT STEP DOCS	CUSTOMER	DATE	TOTAL	ACTION
52825 (Cancelled)		1000957 (QR) (CCancelled)	FirstKey Homes (Training)	04/12/2023 (QR Due Date)		
		1001235 (Quote) (Closed)	FirstKey Homes (Training)	03/08/2023 (QU Expired Date)	\$250.00	
1	52827 (PendReview)	1003300 (Order) (SCompleted)	FirstKey Homes (Training)	03/01/2023	\$250.00 2	3 Create Invoice
		1001676 (Inv) (PendReview)	FirstKey Homes (Training)	03/22/2023	\$250.00	

3.5: Customer Messaging & Internal Notes

In the Conversation History section, you can review and log internal notes and message FirstKey Homes.

1. Click on the **Customer** tab to message FirstKey Homes
2. Click on the **Internal Notes** tab to enter an internal note for supplier internal company communications
(FirstKey Homes cannot see internal notes)



Approved ways to communicate with FKH are:

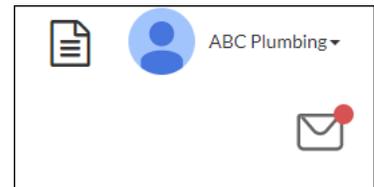
1. Phone Call to Local Service Team
2. Message to Local team via Customer Messages in Facilgo

Email should not be used for work order related communication, all communication should be documented in the work order

3.6: Notifications

As a supplier, you can view messages from FKH from the dashboard screen by clicking on the message envelope. A red dot indicates you have 1+ unread messages.

Click on **Mark as Read** once you have responded to the message to remove the message from the inbox.



3.7: Contact History

Suppliers should log the conversations they have with FirstKey Homes (calls) and residents (via phone or email) by summarizing them in the Contact History section of the work order.

1. Call- document all call attempts to the resident
2. Email- document all email attempts to the resident

Contact History

CALL EMAIL

No data.

Save Call Record

Detail

Date/Time: 04/10/2023 05:39 pm

Note: Called and left resident voicemail for scheduling

Cancel Submit

3.8: Work Order Status Definitions

Work Order Status	Status Definition	Supplier Next Steps
SentToSupplier	A quote request has been sent to a supplier. The supplier has not viewed the QR yet.	Review the new QR within 1 business day .
SvcOrdered	A work order service order (PO) has been sent to a supplier. The work has not been scheduled yet.	Confirm or decline the order within 1 business day .
SReviewed	When a supplier opens a QR or order , there is an automatic status change to SReviewed status indicating the supplier has reviewed the QR or order.	Supplier opened the QR or order . Supplier should: Create a Quote or Reject the QR . Confirm or Reject the order within 1 business day .
QuoteProvided	A supplier has sent a quote but the quote is still open. FirstKey Homes has not acted on the quote after receiving it.	Await a response from FirstKey Homes.
Confirmed	A supplier has confirmed that they will work on the WO.	Schedule work with the resident and input the scheduled start/end date on the WO within 3 days SLA dependent see section 4.0 .
SvcSched	A supplier has scheduled a WO service . There is an automatic status change to SvcSched when the supplier enters scheduled start/end dates.	<ul style="list-style-type: none"> • Perform the work. • Take pictures. • Add comments. • Complete the WO within 3 days of Scheduled date. • Complete the invoice.
SCheckedIn	A supplier has checked into a WO in the supplier application.	<ul style="list-style-type: none"> • Perform the work. • Take pictures. • Add comments. • Complete the WO. • Complete the invoice.
SIncomplete	A supplier has checked out of a WO without completing the WO.	<ul style="list-style-type: none"> • Perform the work. • Take pictures. • Add comments. • Complete the WO. • Complete the invoice.
PendReview	The supplier completed the WO and is awaiting review by FKH.	Wait for FKH to review the completed WO.
Disputed	FKH disputes a WO completed by a supplier.	Respond to the dispute via messaging on the WO within 5 business days .
<p>Initialisms WO = work order PO = purchase order QR = quote request FKH = FirstKey Homes PMC (Property Management Company) = property management company (FKH)</p>		

Clarifications The prefix letter, **S** or **C**, in the work order status (e.g., **S**Reviewed, **C**Declined) refers to either **Supplier** or **Customer** (FKH).

4.0: Service Level Agreement

Vendor understands and agrees that FKH will assign a priority to each Work Order assigned to Vendor as follows:

- (a) Emergency
- (b) Urgent
- (c) Violation
- (d) Next Available (with Emergency Work Orders being the highest priority).

In the event of an Emergency Work Order, Vendor must provide FKH with notice if it is unavailable at least four (4) hours prior to the scheduled service call.

- Emergency Work Order requests:
 - shall be completed within twenty-four (24) hours of Vendor's receipt of the Work Order (or, if earlier, Vendor's receipt of email notification or other notification of the applicable request);
- Urgent Work Order requests are to be completed within three (3) days of Vendor's receipt of the Work Order;
- Violation Work Order must be completed within three to five (3-5) business days of Vendor's receipt of the Order.
- Next Available Work Order requests must be completed within three to five (3-5) business days of Vendor's receipt of the Order.
 - Exceptions will be made if required parts or materials that are ordered that take more than three (3) business days to receive, in which case work must be completed:
 - (a) with respect to any Emergency Work Order, within twenty-four (24) hours of receipt of said parts or materials, and
 - (b) with respect to any other Work Order, within three (3) business days of receipt of said parts or materials.
 - If Vendor does not have the required part(s) for any Work Order, Vendor must provide immediate notice to FKH; FKH, in its sole and absolute discretion, may either: extend the time for Vendor to complete the relevant Work Order, but such Work Order may be cancelled at that point if the part(s) are not available in a reasonable amount of time.
- Vendor agrees to send or upload the invoice within five **(5) days** of work completion. Without limiting the foregoing, FKH shall have no obligation to pay for any Services, or any related materials, if the invoice is received by FKH more than **90 days (about 3 months)** after the completion of the corresponding Work Order.
- Under no circumstances will FKH be responsible for any work that has not been approved in writing prior to the work being commenced by the Vendor.

- Costs to perform any work necessary to correct defective workmanship or construction defects or to perform work required under this Agreement shall be Vendor's responsibility ("Warranty").

5.0: Facilgo Supplier Dashboard

Once the supplier logs in to Facilgo, they can access the Supplier Next Step Dashboard. This dashboard provides the supplier with an overview of all the pending work orders and the subsequent action they need to take.

Supplier Next Step Dashboard				
Customer: All				
Work Order Priority: Emergency , Urgent , Next Available				
Action Items	Emergency	Urgent	Next Available	Total
Pending Cancellation	2	2	0	4
Confirm WO	1	15	1	17
Schedule WO	0	3	2	5
Unanswered Quote Request	0	2	0	2
Future Scheduled WO's	0	0	0	0
Complete WO & Invoice (Scheduled Date Past)	0	1	2	3
Complete WO (Already Invoiced)	0	1	1	2
Disputed WO	0	0	0	0
Disputed Invoice				5

Below is a quick glance of each dashboard row and the action required for the supplier for the work orders reflected in the number hyperlinks. We will go into more detail on how to take action in Facilgo.

Supplier Next Step Dashboard Definitions	
Pending Cancellation 5.1 Pending Cancellation	FKH has requested the Supplier cancel the order. Supplier to review and confirm cancelation with 2 days.
Confirm WO 5.2 Confirm a WO (with NTE Value)	Supplier to confirm or reject the WO with 3 days priority dependent.
Schedule WO 5.3 Schedule WO	Supplier to reach out to resident to schedule appt and edit the WO with the scheduled date/time within 3 business days.
Unanswered Quote Request 5.4 Unanswered Quote Request (Provide a Quote)	Supplier to provide quote (by the Quote Expiration date) or decline within 3 business days.
Future Scheduled WO's 5.5 Future Scheduled WO's	WO is scheduled with the resident for a future date
Complete WO & Invoice 5.6 Complete WO 5.7 Submit an Invoice	It's past the WO scheduled date, Supplier to complete the WO within 3 days of scheduled start date and invoice within 5 days of completion
Complete WO (Already Invoiced) 5.6 Complete WO	An invoice was submitted but the WO has not been completed. FKH cannot approve the invoice until the WO is completed
Disputed WO 5.8 Disputed WO (Respond to a Disputed Work Order)	FKH has disputed the work order. Review and respond to the dispute within 5 days.
Disputed Invoice 5.9 Disputed Invoice (Respond to a Disputed Invoice)	FKH has disputed the invoice. Review and respond to the dispute within 5 days.

5.1 Pending Cancellation

If FirstKey Homes requests to cancel a work order, it will appear in the "Pending Cancellation" section of the dashboard. Some of the common reasons for FKH to cancel a work order are if it is a duplicate work order, no response from the vendor, or if the work is no longer needed. As a supplier, you have the option to decline the request within 48 hours (about 2 days). However, if you fail to respond within 48 hours (about 2 days), the system will automatically cancel the order.

When a supplier can reject cancellation:

- If work has commenced onsite with documented approval
- Incurred Fees (Eagle views, Diagnostic Fees)

To respond to the cancellation request in Facilgo, complete the following steps:

Supplier Next Step Dashboard						
Customer: All						
Work Order Priority: Emergency , Urgent , Violation , Next Available						
Action Items	Emergency	Urgent	Violation	Next Available	Total	
1 Pending Cancellation	0	1	0	0	1	
Confirm WO	0	2	0	1	3	

1. Select the WO count hyperlink to review the work order under "Pending Cancellation" on the Supplier Next Step Dashboard
2. Select the WO from the list on the left side menu and review the WO
3. Accept or Reject the Cancellation Request

The screenshot shows the 'ORDERS' section of the FacilGo interface. A work order for 'FirstKey Homes (Training)' is highlighted with a red box and a '2' icon. The order details show a total of \$350.00 and a 'PendCancellation' status. The 'Accept Cancellation' and 'Reject Cancellation' buttons are visible at the bottom.



After 48hrs the system will auto cancel the order if the supplier does not reject the request to cancel. Suppliers are urged to monitor their dashboard and emails for these notifications.

5.2 Confirm a WO (with NTE Value)

There are two ways that FirstKey Homes sends work to suppliers.

1. Sending a quote request (See section [5.4 Provide a Quote](#))
2. Sending a work order with an order for a Not to Exceed (NTE) value (See section [5.2 Confirm a WO \(with NTE Value\)](#))

When a new work order is dispatched to a supplier, it will appear on the Supplier Next Step Dashboard under “Confirm WO.”

Confirm WO	0	3	0	1	4
------------	---	---	---	---	---

To respond to the work order in Facilgo, complete the following steps:

1. Select the WO count hyperlink to review the work orders under “Confirm WO” on the Supplier Next Step Dashboard
2. Select the WO from the list on the left side menu and review the WO
3. Scroll to the Next Step Table and review the Actions (Action buttons are also on the bottom of the WO):
 - a. If you can complete the order within the SLA select **Confirm** within 24 hours of receipt
 - b. If you are unable to accept the work
 1. Send FKH (Customer) message on the work order with the reason you are rejecting
 2. Select **Reject** to reject work order

PARENT WO	CHILD WO	NEXT STEP DOCS	CUSTOMER	DATE	TOTAL	ACTION
51930 (SvcOrdered)		1003221 (Order) (SNewOrder)	FirstKey Homes (Training)	01/12/2023	\$350.00	<div style="border: 1px solid purple; padding: 2px;"> Confirm Reject </div> <div style="margin-top: 5px;"> Create Invoice </div>

Related Documents

Confirm
Edit
Complete
Reject



The NTE value is shown under total on the work order's line item. Confirming the work order means you can complete the scope of work within this dollar amount. If additional funds are required, additional approval is required (see section [6.0 Request Additional Funds](#))

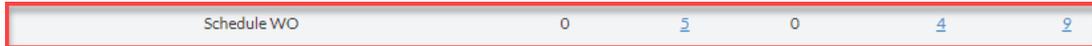
PARENT WO	CHILD WO	NEXT STEP DOCS	CUSTOMER	DATE	TOTAL	ACTION
53175 (Confirmed)		1003356 (Order) (SConfirmed)	FirstKey Homes (Training)	04/10/2023	\$350.00	<div style="border: 1px solid purple; padding: 2px;"> VerCompleted </div> <div style="margin-top: 5px;"> Create Invoice </div>

If the supplier confirms the work order, the work order status will reflect “Confirmed” so FKH knows that the supplier accepted the work. **(This should be done within 24 hours of receipt of request)**

5.3 Schedule WO

After the work order is confirmed, the next step is for the supplier to reach out to the resident to schedule and document each resident's interaction in the Contact History Tab.

Until the work order is scheduled, it will appear on the Supplier Next Step Dashboard under “Schedule WO”.



A scheduled date must be entered by the supplier to keep FKH and the resident updated on the status of the work order.

To schedule a work order in Facilgo, complete the following steps:

1. Click on the resident's name to review resident contact information * *Reach out to the local service team if there are any challenges with Resident contact information (disconnected number or blank fields). Feel free to Reach out to Roommates to schedule the appointment.*
2. Click on **Edit** on the work order

AP

Plumbing, Faucet / Spigot, Next Available

[Same Location Work Order](#) 1

ABC Plumbing - 1 Flamingo Ct Amelia, OH 45102

1 Flamingo Ct
Amelia, OH, 45102
● Confirmed

<p>WO DATE: 04/10/2023</p> <p>CATEGORY: Plumbing</p> <p>WO SERVICE: Y</p> <p>WO#: 53175</p> <p>UNIT#: 90017901</p> <p>RESIDENT: CASEY EDENFIELD 1</p> <p>ENTRY NOTES:</p> <p>REASON:</p> <p>REQUIRE PHOTO: N</p> <p>PROJECT:</p> <p>SCHEDULED START DATE/TIME:</p>	<p>DUE DATE:</p> <p>SUBCATEGORY: Faucet / Spigot</p> <p>SUPPLIER: ABC Plumbing(Registered)</p> <p>MTCREQID:</p> <p>ASSOCIATED FIXED ASSET:</p> <p>PRIORITY: Next Available</p> <p>RESOLUTION:</p> <p>SCHEDULED END DATE/TIME:</p>
---	---

[▼ more](#)

2 Show By Grouped Room Names Yes

Show More Line Item Info No

DETAILS

TIME & \$

Edit
Complete

3. Populate the **Scheduled Start & End Date/Time**

4. Click **Save**

5. Click **Go to Summary** to return to the work order

After the supplier enters the scheduled dates on the work order, the work order status is updated to “SvcSched” and sends the resident a status email. This work order will remain in the Supplier Next Step Dashboard under “Future Scheduled WO’s” until the scheduled date.

Future Scheduled WO's	0	0	0	0	0
-----------------------	---	---	---	---	---

5.4 Unanswered Quote Request (Provide a Quote)

When FKH's sends a supplier a Quote Request (QR), it will appear on the Supplier Next Step Dashboard under "Unanswered Quote Request." This quote request will NOT have a Not to Exceed (NTE) Value associated as we are requesting the supplier send us a quote. Notice, the work order status for a quote request is "SentToSupplier".

Unanswered Quote Request	0	3	0	0	3
--------------------------	---	---	---	---	---

To create a quote in Facilgo, complete the following steps:

1. Select the WO count hyperlink to review the work orders under "Unanswered Quote Request" on the Supplier Next Step Dashboard
2. Select the WO from the list on the left side menu and review the WO
3. Scroll to the Next Step Table and review the Actions (Action buttons are also on the bottom of the WO):
 - a. If you are not able to provide a quote, select the **Reject** button on the bottom of the work order (or the **Void** button on the Next Step Table under Actions). Send FKH a customer message on the quote request with the reason you are rejecting
 - b. If you can quote the work, select **Create Quote** to enter the details
 - c. If you need to visit the property before submitting the bid, click on the resident's name on the work order to get contact information to set up an appointment. Make sure to update the Scheduled Start & End Time on the work order

PARENT WO	CHILD WO	NEXT STEP DOCS	CUSTOMER	DATE	TOTAL	ACTION
52009 (SReviewed)		1000938 (QR) (SNotRead)	FirstKey Homes (Training)	04/12/2023 (QR Due Date)		<div style="text-align: right;"> Create Quote Void </div>
	52011 (SDeclined)	1000939 (QR) (SCancelled)	FirstKey Homes (Training)	05/08/2023 (QR Due Date)		

[Edit](#) [Reject](#)

When populating the quote in Facilgo, the fields highlighted in yellow indicate required fields.

The screenshot shows the FacilGo quote creation interface. The top section contains form fields for: QUOTE TITLE (1), QUOTE EXPIRES (2), QR#, CUSTOMER, REG / PROP COVERAGE, QUOTE TYPE (4), and SUPPLIER QUOTE# (3). Below these are links for Attach Image(s) (5), Attach File(s) (6), and Attach Service Level Agreement. A table below lists items with columns: No., SKU, Item, Qty, Price, UOM, Ext. Price, Property, Category, Tax, Units, Notes. The first row (7) is highlighted in yellow. Below the table are input fields for Qty (8), Unit Price (9), EA (Each) (10), and a dropdown for property (10). A 'Save' button (11) and 'Remove' button are present. A 'Tax?' checkbox (11) is also visible. Below the table, a 'Sub Total' (0.00) and 'Grand Total' (0.00) are shown. A 'Tax' field (12) is highlighted in yellow. At the bottom, there are buttons for 'Add Line Item' (13), 'Add Items from List', 'Remove All Items', 'Set Unit To All Item', 'Send' (14), 'Save', 'Add All', and 'Cancel'.

- | | | |
|---------------------|---------------------|---|
| 1. Quote Title | 6. Attach File(s) | 11. Select Save |
| 2. Quote Expires | 7. Line-Item Title | 12. Tax |
| 3. Supplier Quote # | 8. Quantity | 13. Click on Add Line Item to add more line items, if applicable |
| 4. Quote Type | 9. Unit Price | 14. Click Send to submit the quote |
| 5. Attach Image(s) | 10. Unit of Measure | |

After a supplier submits a quote, the work order status is updated to “Quote Provided” and the FKH (FirstKey Homes) market team will review the quote. If the quote is accepted by FKH, the market team will convert the quote to an order (See section [5.2 Confirm a WO \(with NTE Value\)](#)).

5.5 Future Scheduled WO's

After the supplier enters the scheduled dates on the work order, the work order status is updated to “SvcSched” and sends the resident a status email. This work order will remain in the Supplier Next Step Dashboard under Future Scheduled WO's until the scheduled date.

Future Scheduled WO's	0	0	0	0	0
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5.6 Complete WO (Scheduled Date Past)

After the work is completed at a property (within the approved NTE), the supplier must complete the work order with the required details including:

- Before and after pictures of the work completed **FacilGo accepted picture format is JPEG file type*
- Comprehensive notes detailing (findings, scope of work, root cause, and solution)

To complete the work order in Facilgo, complete the following steps:

1. Select the WO count hyperlink to review the work order under “Complete WO (Scheduled Date Past)” or search for the WO number
2. Click **Edit** on the work order

The screenshot displays the 'WORK ORDERS' section of the FacilGo interface. On the left, a list of work orders is shown, including 'Eremina QR Roof, Replacement Roof, Urgent' with a 'SvcSched' status. A purple arrow labeled '1' points to the 'Show Action' button next to this entry. On the right, the detailed view of the selected work order is shown, including fields for 'WO DATE', 'DUE DATE', 'CATEGORY', 'SUBCATEGORY', 'WO SERVICE', 'SUPPLIER', 'UNIT', 'RESIDENT', 'PRIORITY', 'REASON', 'SCHEDULED START DATE/TIME', and 'SCHEDULED END DATE/TIME'. A purple arrow labeled '2' points to the 'Edit' button at the bottom of the detailed view.

3. Scroll down to the line item
4. Upload before and after pictures in the **Attach Image(s)**
5. Enter completion **Notes** detailing findings, scope of work, root cause and solution
6. Click **Save**
7. Click **Complete**

3 Undefined Room

1.1 HVAC, Thermostat, Urgent #91009103 \$0.00

4 Attach Image(s)

5 AC is not cooling

Issue: Thermostat stopped working and had Change battery icon. Scope of Work: Diagnose issue remove and replace damaged blower motor and capacitor, remove and replace burnt electrical wires.

Check In

6 Save 7 Complete Goto Summary

After the supplier completes the work order, the work order status will update to “PendReview” and triggers the FKH market office to review the work order for quality. Once FKH reviews and signs off on the work order, the work order status will then be updated to “Completed”. The work order will be disputed if there are issues with the images / completion notes (See section [5.8 Disputed WO \(Respond to a Disputed Work Order\)](#)).

5.7 Submit an Invoice

After suppliers' complete property maintenance work for FKH, they are obligated to submit invoices for their services within the SLA's or else they risk foregoing payment. The FKH Vendor Service Agreement (VSA) communicates the following information about SLA's to vendors:

- 7.7 Vendor agrees to send or upload the invoice within five (5) days of work completion. Without limiting the foregoing, FKH shall have no obligation to pay for any services, or any related materials, if the invoice is received by FKH more than 90 days after the work is completed.

Work orders should be completed by the supplier prior to invoicing (Work Order status = Pend Review or Completed). Supplier's are allowed to invoice prior to completion, however the system will automatically dispute the invoice until the work order is completed. FKH cannot process a payment until the work order is completed.

To create an invoice in Facilgo, complete the following steps:

1. From the Next Step Table on the work order, click on **Create Invoice**

PARENT WO	CHILD WO	NEXT STEP DOCS	CUSTOMER	DATE	TOTAL	ACTION
51840 (PendReview)		1000900 (QR) (Closed)	FirstKey Homes (Training)	12/30/2022 (QR Due Date)		
		1001187 (Quote) (Closed)	FirstKey Homes (Training)	12/29/2022 (QU Expired Date)	\$1,000.00	
		1003150 (Order) (SConfirmed)	FirstKey Homes (Training)	12/19/2022	\$1,000.00	<div style="display: flex; gap: 5px;"> <div style="border: 1px solid black; padding: 2px;">VerCompleted</div> <div style="border: 1px solid black; padding: 2px;">1</div> <div style="border: 1px solid black; padding: 2px;">Create Invoice</div> </div>

The fields in yellow indicate a required field. Populate the following fields on the invoice.

1. Invoice Date
2. Supplier Invoice # (cannot be a duplicate of any other invoice number used by your organization)
3. Attach File(s)
4. Item
5. Quantity
6. Price
7. UOM (Unit of Measure)
8. Select **Save**
9. **Add New Item** (if applicable)
10. Tax
11. Select **Submit**

CREATE INVOICE

FacilGo™

INVOICE DATE: DUE DATE:

SUPPLIER INVOICE#: FIN INVOICE#:

CUSTOMER NAME: FirstKey Homes (Training) REGISTERED: Y

PROPERTY NAME: 10 Brookcliff Ct Temple, GA 30179 COMPLETION DATE:

REFERENCED PO/CONTRACT#: 1003150 (Order) CUSTOMER ACCOUNT: FKH

SHIP TO ADDRESS: Use Property Ship To Address

BILL TO ADDRESS: 10 Brookcliff Ct

PAYMENT DATE: PAYMENT AMOUNT: 0.0

5	SKU	Item	Qty	Price	UOM	Ext. Price	Unit	Tax	Ref Order Item Id
		Eremina QR,Arizona Plumbing, Environmental, Water Quality Testing, Urgent							
1	6	Price	7		Item SKU				<input type="checkbox"/> Tax?
		EA (Each)	8		Unit#				

Subtotal: \$0.00
 Total Tax: \$ 0.00 0.00 %
 Shipping Amount: \$ 0.00
 Discount Amount: \$ 0.00
 Grand Total: \$0.00



If an external vendor attaches a PDF copy of the invoice to the Facilgo invoice, the FKH accounts payable team requires an **exact** match between all required fields including:

- Vendor's name/title
- Purchase order number (PO#) (must match the corresponding order)
- Property address for the corresponding maintenance issue
- Invoice number
- Invoice date
- Itemized list of products/services (must match the corresponding order)

After the invoice is submitted, the invoice status will be updated to "PendReview" for FKH to review and approve the invoice before it is approved for payment. The invoice will be disputed if the invoice exceeds the NTE order amount or documented approval on the work order (See section [5.9 Disputed Invoice](#)).

5.8 Disputed WO (Respond to a Disputed Work Order)

When FKH's disputes a WO it will appear on the Supplier Next Step Dashboard under Disputed WO. The Supplier will Reference the customer messages to address the dispute.

Disputed WO	0	<u>1</u>	0	0	<u>1</u>
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To respond to the disputed work order in Facilgo, complete the following steps:

1. Select the WO and review the request
2. Scroll to the Customer Tab to review the reason for the dispute
3. Reply to the Customer (FKH) when the dispute has been resolved

Conversation History

CUSTOMER INTERNAL NOTES

ABC Plumbing
less than a minute ago
Please see the updated completion notes. Thanks!

Lisa (Training) Sasik (Training)
3 minutes ago
Please update completion notes to include the scope of work completed and route cause.

[Mark as Read](#)

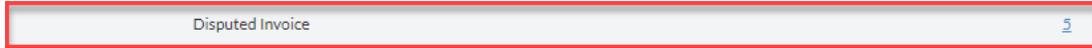
[Select Message Template](#)

Type here...

[Save Comment as Template](#) [Send Message](#)

5.9 Disputed Invoice (Respond to a Disputed Invoice)

When FKH's disputes a supplier an invoice it will appear on the Supplier Next Step Dashboard under "Disputed Invoice".



Common reasons for disputed invoices:

- The attached pdf invoice does not match what's entered on the Facilgo invoice (Vendor name, PO#, property address, invoice #, date, amount)
- The amount invoiced was not approved prior to the work being completed
- The associated work order is not completed (WO status = PendReview or Completed)

To respond to the disputed invoice in Facilgo, complete the following steps:

1. Select the Invoice
2. Scroll to the Customer Tab to see the reason for the disputed invoice
3. To edit the invoice, select **edit** on the invoice



4. To edit the invoice amount, click on the line item (select anywhere in the grey line to open the fields to editing)

NA	Exterior Building, Replacement Driveway, Urgent	1	\$550.00	EA	\$550.00	90109101	N
----	---	---	----------	----	----------	----------	---

5. Update the invoice amount and select the green **Save** button to save the line item
6. Select **Save** to save the invoice details

SKU	Item	Qty	Price	UOM	Ext. Price	Unit	Tax
	Exterior Building, Replacement Driveway, Urgent						
1		475.00	NA				<input type="checkbox"/> Tax?
	EA (Each)			Unit#			
				Save	Remove		
					Subtotal:	\$0.00	
					Total Tax:	\$ 0.00	0.00 %
					Shipping Amount:	\$ 0.00	
Save		Cancel					

7. Reply to the Customer (FKH) when the dispute has been resolved

CUSTOMER
RELATED DOCUMENT MESSAGES

ABC Plumbing
less than a minute ago
The invoice amount was updated, please review.

Lisa (Training) Sasik (Training) Mark as Unread
less than a minute ago
This invoice amount is above the NTE and was not approved prior to the work being completed. Please adjust the invoice amount for approval.

ABC Plumbing
01/05/2023
Dear 10 Briarcliff Place Stockbridge, GA 30281,

An invoice has been sent to you by ABC Plumbing through FacilGo®.
Please pay this invoice at your earliest convenience.

Regards, ABC Plumbing ABC Plumbing

[Select Message Template](#)

Type here...

Save Comment as Template
Save As Internal Note
Send Message



If a supplier submits an invoice before the work order is completed in Facilgo, the system will automatically dispute the invoice. As the supplier, you will see “WO Not Complete” when reviewing the invoice.

<p>FirstKey Homes (Training) 10 Briarcliff Place Stockbridge, GA 30281 Invoice# 00001</p>	<p>11/30/2022 \$250.0 Disputed</p>	>
● WO Not Complete		

6.0 Request Additional Funds

When a supplier requires funds above an order’s NTE amount to resolve a maintenance issue, the supplier should contact the relevant service manager (SM) before working on the maintenance issue.

How suppliers can request additional funds:

- Facilgo Messaging
- Uploading quote to original WO
- Phone (email and text are not FKH approved lines of communication for work order approval)

The supplier should use the Conversation History section of the work order to communicate with the FKH SM. In the Conversation History section, the supplier should

- a) Click on the **Customer** messaging tab
- b) Click inside the text message box and type a message explaining what funds are required and the reason the cost is above the order’s NTE amount. The Supplier is required to provide a Scope of Work
- c) Click the Send Message button to submit the message to the SM

The supplier should follow up with the service manager to ensure the manager receives the request. To do so, the supplier should call the SM (Service Manger) to discuss the issue.

The supplier should not proceed with work until a new order with an updated NTE is sent or documented written approval is on the work order for the additional amount.

 <p><i>What is required from suppliers when requesting additional funds</i></p>			
<p>Pictures to support the recommended Scope of Work of work. Supplier Pictures need to tell the story (JPEG).</p>	<p>Scope of Work Details</p> <ul style="list-style-type: none"> - Why are you recommending Replace vs. Repair - Permitting Information - Detail Breakdown of Root Cause and Proposed Solution - What was the cause of the issue - Damage Caused by Resident Neglect or Actions 	<p>Line-Item Pricing</p> <ul style="list-style-type: none"> - Labor (man hours / cost per hour) - Material (item description / unit of measure) 	<p>Special Line-Items</p> <ul style="list-style-type: none"> - Special equipment (remediation equipment, dumpsters, generators, ect) - Overhead (GC Fees) -Fees (permits, engineering)

7.0 Supplier FAQ's

What if residents do not respond to scheduling attempts?

When attempting to fulfill service requests, suppliers should attempt to contact residents about scheduling service requests according to the following schedule:

- Contact residents once during the a.m. time window each day for three consecutive days (72 hours)
- Contact residents once during the p.m. time window each day for three consecutive days (72 hours)

If suppliers follow this resident-contact schedule and fail to connect with a resident after three full days, they should communicate as such with FKH through customer messaging. They should use the relevant work order's Conversation History section to document and communicate about their failed resident-contact attempts.

To process work orders with unfulfilled service requests of this kind, service managers will cancel the applicable work orders (the work orders move into SDeclined status) and then process such work orders according to normal workflows.

How do I add a user to my supplier account in Facilgo?

To add a new user: On the left navigation bar -> Go to Setup -> Users -> "New User."

Do I get email notifications in Facilgo?

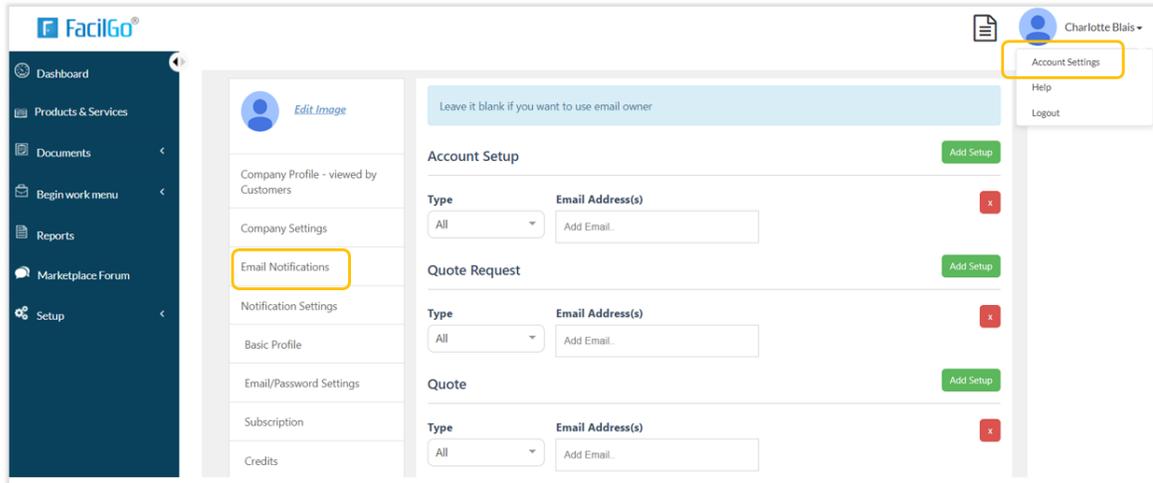
An email will be sent to the "specific email id" populated in the fields given when the following documents are created" Quote request, Quote, Contract, Price List, Discussion, Order, Invoice."

If it is blank, by default, the email will be sent to the Owner (Company Admin) / the person who initially set up the company in FacilGo.

How do I customize email notifications in Facilgo?

Setting up Email Notifications on FacilGo

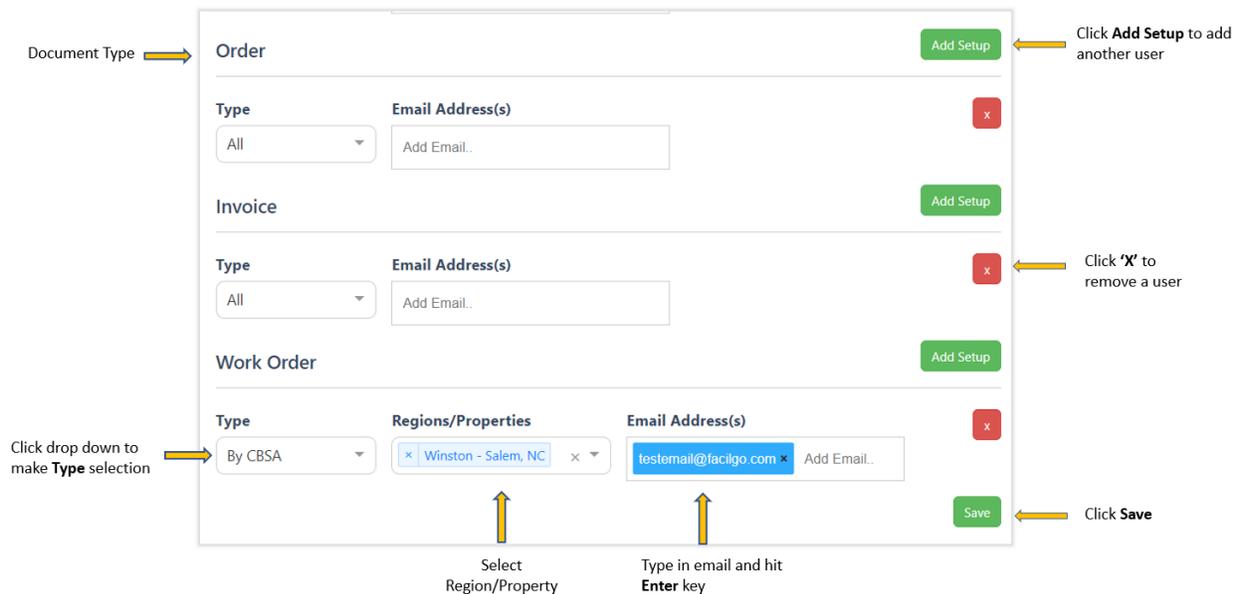
- Navigate to **Account Settings**
- Click on **Email Notifications**



On the Email Notifications page, you can set the platform up so different users can receive email notifications specific to their CBSA, Category, Customer, or a combination of these attributes. These selections can be unique per document type.

1. To set a user up, go to the document section you want to set up.
2. Click the dropdown arrow under Type, and select the criteria
3. Type in the user's email address and hit the Enter key
4. To save the information, scroll to the bottom of the page and click Save

If you would like to set up a second user under a document type, click the Add Setup button
You can select multiple CBSA's, Categories, and Companies



Type Definitions

PMC – Property Management Company

CBSA – Core Based Statistical Area/Regions

Category – FacilGo Catalog Taxonomy Categories (*Applies to catalog vendors only*)

Who do I contact for questions?

Local service team for WO and invoice related questions

Are there any fees to use Facilgo as a supplier?

Effective February 1st, 2023, the fee structure below for all suppliers supporting FirstKey Homes on FacilGo will go into effect. The fee is applied to the invoice subtotal and will be billed monthly in arrears. Invoice payments will be due in 30 days, and suppliers that are past due will have their accounts suspended. This will remove your ability to receive new work from FirstKey Homes and other companies through FacilGo, so please make sure that your account payments are current.

Date	Fee
February 1, 2023 – January 31, 2024	1%
February 1, 2024 - ongoing	2%

For any questions regarding the Facilgo fees, please contact support@facilgo.com.

I am on a document (Invoice, Quote, Quote Request, Order), how do I get back to the Work Order in Facilgo?

If you are trying to navigate back to the work order, select “more” on the document and there will be a field **Reference WO Title** that has a hyperlink that will get you back to the work order in Facilgo.

 FirstKey Homes (Training) Marietta, GA, 30067		Ere Natural Disaster 0004 Flooring , Replacement Vinyl Plank , Urgent 01/13/2023 ● CNotRead	
QU#:	1001204	EXPIRES:	01/20/2023
SUPPLIER QUOTE#:		EFFECTIVE DATE:	
REQUESTER:	Test SM1	REQ START DATE:	04/26/2023
QUOTE TYPE:	Order	SCHED START DATE:	
PERMISSION TO ENTER:	Yes	REFERENCE CONTRACT TITLE:	
REG / PROP COVERAGE:	10 Brookcliff Ct Temple, GA 30179	REFERENCE WO TITLE:	Ere Natural Disaster 0004 Flooring , Replacement Vinyl Plank , Urgent
REFERENCE QR TITLE:	Ere Natural Disaster 0004 Flooring , Replacement Vinyl Plank , Urgent	REFERENCE INVOICE#:	
REFERENCE INSPECTION TITLE:			
REFERENCE PO#:			

[^ less](#)