

How to Create a Work Order in Buildium

This guide walks you through how to create a work order in Buildium, from setting up vendor categories and adding vendors to filling out the work order form, recording a bill, and confirming the financial impact on the property. It also covers the Property Inspections module, which integrates with your maintenance workflow. Each section below reflects what you see on screen as you move through Buildium's Maintenance tools.

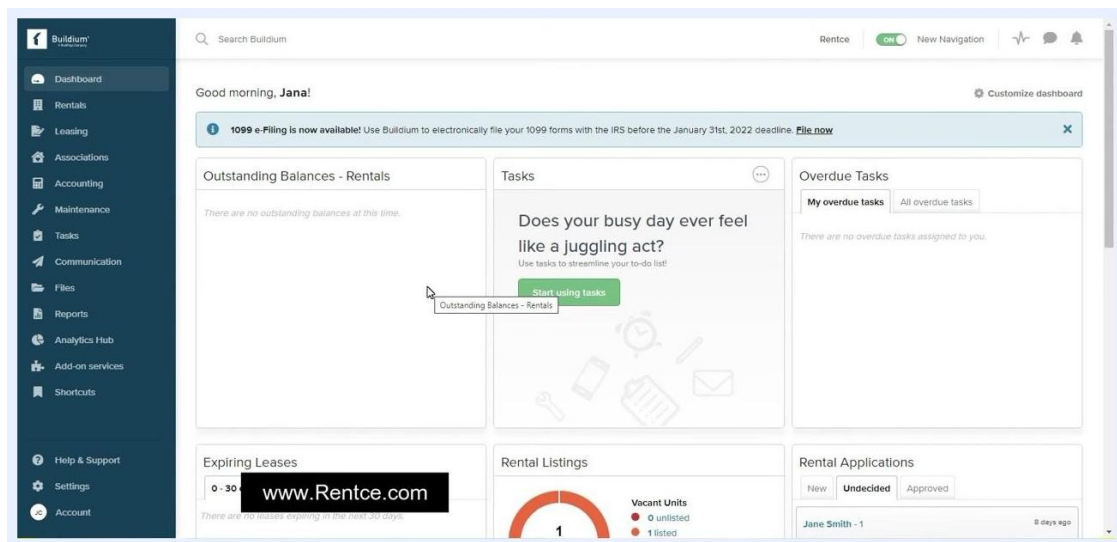
Prerequisites

- An active Buildium account with access to the **Maintenance** tab.
- At least one property set up under **Rentals**.
- Vendor information (tax ID, insurance details) ready to enter, if you plan to add a new vendor.

Accessing the Buildium dashboard

Step 1: Log in and review the dashboard

Log in to your Buildium account to land on the main dashboard. Here you see panels for Outstanding Balances – Rentals, Tasks, Overdue Tasks, Expiring Leases, Rental Listings, and Rental Applications. The left navigation menu gives you access to Dashboard, Rentals, Leasing, Associations, Accounting, Maintenance, Tasks, Communication, Files, Reports, Analytics Hub, Add-on services, Shortcuts, Help & Support, Settings, and Account.

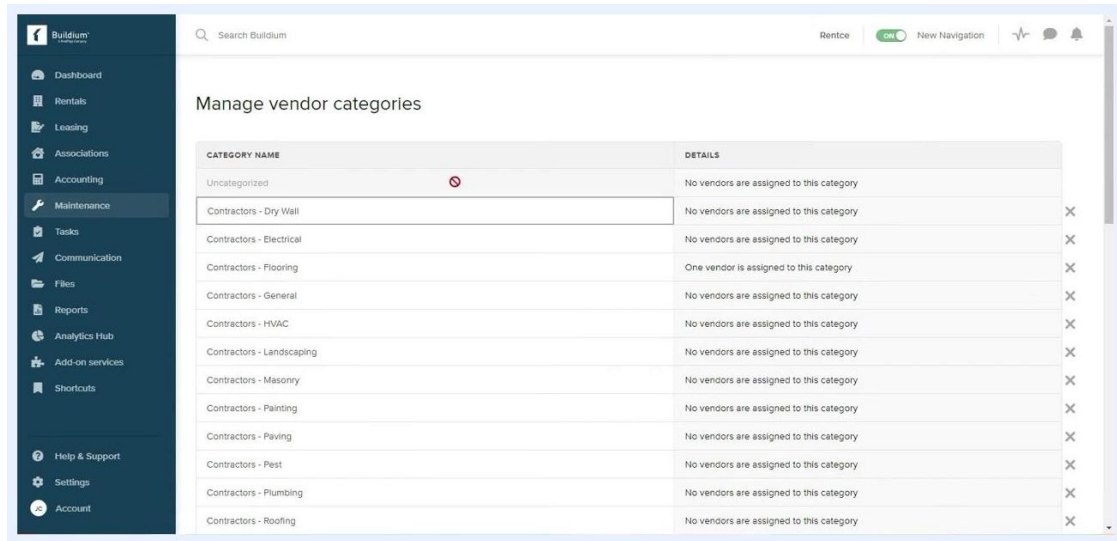


Buildium dashboard with navigation menu, panels for balances, tasks, leases, listings, and applications. The user is greeted with "Good morning, Jana!"

Setting up vendor categories

Step 2: Open the Maintenance tab

All maintenance-related features live under the **Maintenance** tab in the left navigation menu. Hover over or click **Maintenance** to reveal three options: **Vendors**, **Work orders**, and **Property inspections**.

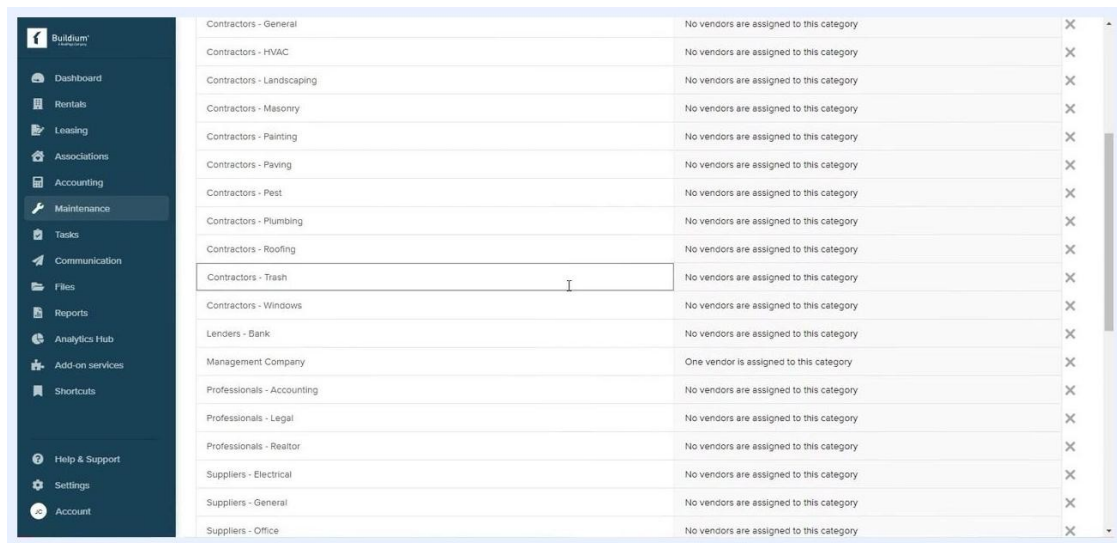


Mouse hovering over the **Maintenance** tab in the left navigation, showing dropdown options: **Vendors**, **Work orders**, **Property inspections**

Click **Vendors** under the **Maintenance** tab, then select **Manage categories** in the top right corner of the **Vendors** page.

Step 3: Review and manage vendor categories

The **Manage vendor categories** screen lists every existing category. Each row shows the category name (for example, Contractors – Dry Wall, Contractors – Electrical) along with details such as "No vendors are assigned to this category" or "One vendor is assigned to this category." Most common categories are already pre-entered for you.



Contractors - General	No vendors are assigned to this category	X
Contractors - HVAC	No vendors are assigned to this category	X
Contractors - Landscaping	No vendors are assigned to this category	X
Contractors - Masonry	No vendors are assigned to this category	X
Contractors - Painting	No vendors are assigned to this category	X
Contractors - Paving	No vendors are assigned to this category	X
Contractors - Pest	No vendors are assigned to this category	X
Contractors - Plumbing	No vendors are assigned to this category	X
Contractors - Roofing	No vendors are assigned to this category	X
Contractors - Trash	No vendors are assigned to this category	X
Contractors - Windows	No vendors are assigned to this category	X
Lenders - Bank	No vendors are assigned to this category	X
Management Company	One vendor is assigned to this category	X
Professionals - Accounting	No vendors are assigned to this category	X
Professionals - Legal	No vendors are assigned to this category	X
Professionals - Realtor	No vendors are assigned to this category	X
Suppliers - Electrical	No vendors are assigned to this category	X
Suppliers - General	No vendors are assigned to this category	X
Suppliers - Office	No vendors are assigned to this category	X

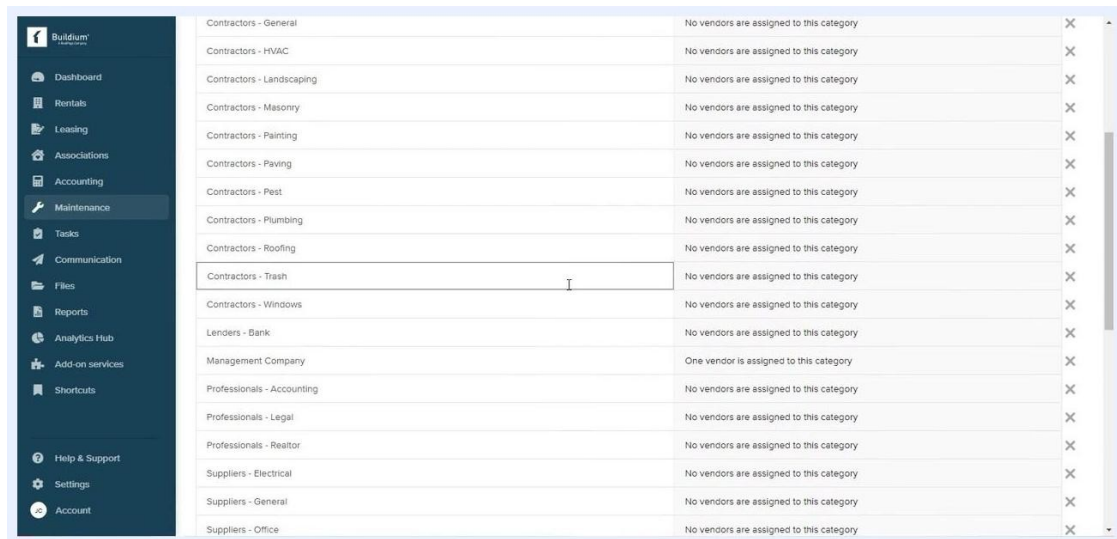
Manage vendor categories screen showing a list of categories such as Contractors – Dry Wall, Contractors – Electrical, and details about vendor assignments

You can add a new category using the option provided at the top of the list, or delete an existing one by clicking the **X** icon on the right of its row. Note that you can only delete categories that have no vendors assigned to them.

Adding and managing vendors

Step 4: Open the Vendors page

Return to the **Vendors** page under the Maintenance tab. This screen lists all vendors with columns for First Name, Last Name, Phone, Email, Insurance Provider, Expires, and Website. From here you can click **Add vendor** in the top right to create a new vendor, use **Manage categories** to return to category management, or use **Compose email** to contact vendors directly.



Contractors - General	No vendors are assigned to this category	X
Contractors - HVAC	No vendors are assigned to this category	X
Contractors - Landscaping	No vendors are assigned to this category	X
Contractors - Masonry	No vendors are assigned to this category	X
Contractors - Painting	No vendors are assigned to this category	X
Contractors - Paving	No vendors are assigned to this category	X
Contractors - Pest	No vendors are assigned to this category	X
Contractors - Plumbing	No vendors are assigned to this category	X
Contractors - Roofing	No vendors are assigned to this category	X
Contractors - Trash	No vendors are assigned to this category	X
Contractors - Windows	No vendors are assigned to this category	X
Lenders - Bank	No vendors are assigned to this category	X
Management Company	One vendor is assigned to this category	X
Professionals - Accounting	No vendors are assigned to this category	X
Professionals - Legal	No vendors are assigned to this category	X
Professionals - Realtor	No vendors are assigned to this category	X
Suppliers - Electrical	No vendors are assigned to this category	X
Suppliers - General	No vendors are assigned to this category	X
Suppliers - Office	No vendors are assigned to this category	X

Vendors management screen showing vendor list, Add vendor button, Manage categories, and Compose email options

Step 5: Enter vendor tax and insurance information

On the **Add vendor** screen, scroll to the **1099-NEC tax filing information** and **Insurance** sections. Under tax filing information, select the Tax Identity Type from the dropdown, enter the Taxpayer ID (SSN or EIN), and optionally check **Use a different name** or **Use a different address** if applicable. Under Insurance, enter the Provider name, Policy Number, and Expiration Date in m/d/yyyy format.

Keeping this information current matters: Buildium automatically reminds you when a vendor's insurance is about to expire.

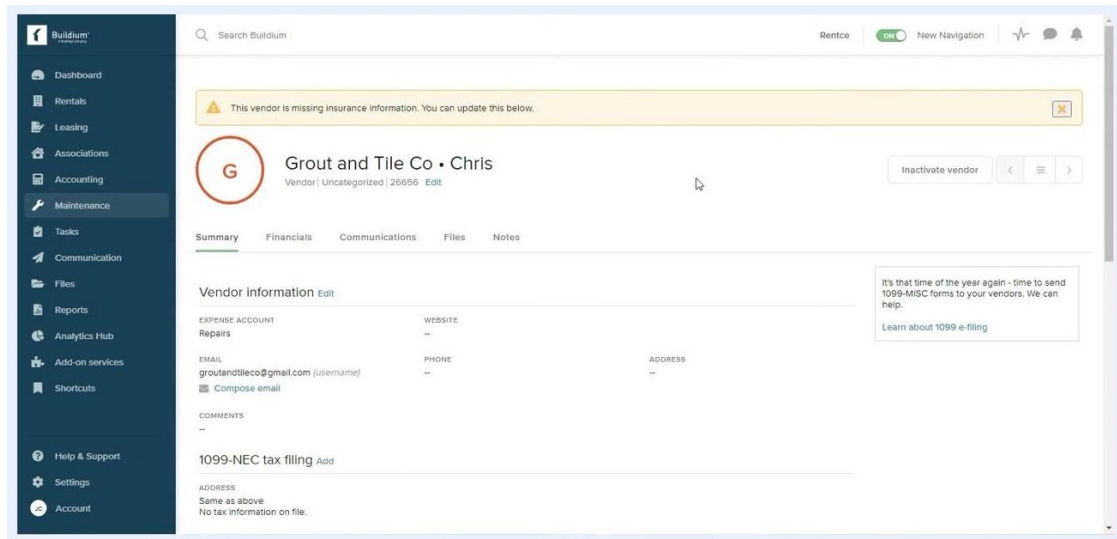
The screenshot shows the Buildium 'Add vendor' form. The 'Maintenance' menu item in the sidebar is circled in red. The form includes fields for Name (First, Last), Work orders, Property inspections, Category (Uncategorized), Expense account (No default expense account), Account number, Contact information (Primary email, Alternate email, Phone), and a checkbox for Company. The URL at the bottom is https://janah1.managebuilding.com/Manager/app/maintenance/vendors.

Add vendor screen showing tax filing and insurance fields: Tax Identity Type, Taxpayer ID, Provider, Policy Number, Expiration Date

After entering all required information, click the green **Create vendor** button at the bottom of the form. Click **Cancel** if you need to discard the entry.

Step 6: View or edit an existing vendor

Navigate to the **Vendors** list under the Maintenance tab and click on the vendor you want to view or edit. The vendor summary page displays the vendor name, category, Vendor ID, an **Edit** link, a warning if insurance information is missing, vendor information (Expense Account, Email, Website, Phone, Address, Comments), 1099-NEC tax filing and insurance status, and account status and portal options.



Vendor summary page for "Grout and Tile Co • Chris" showing a missing insurance warning, vendor information, tax filing, and insurance sections

Step 7: Inactivate a vendor when needed

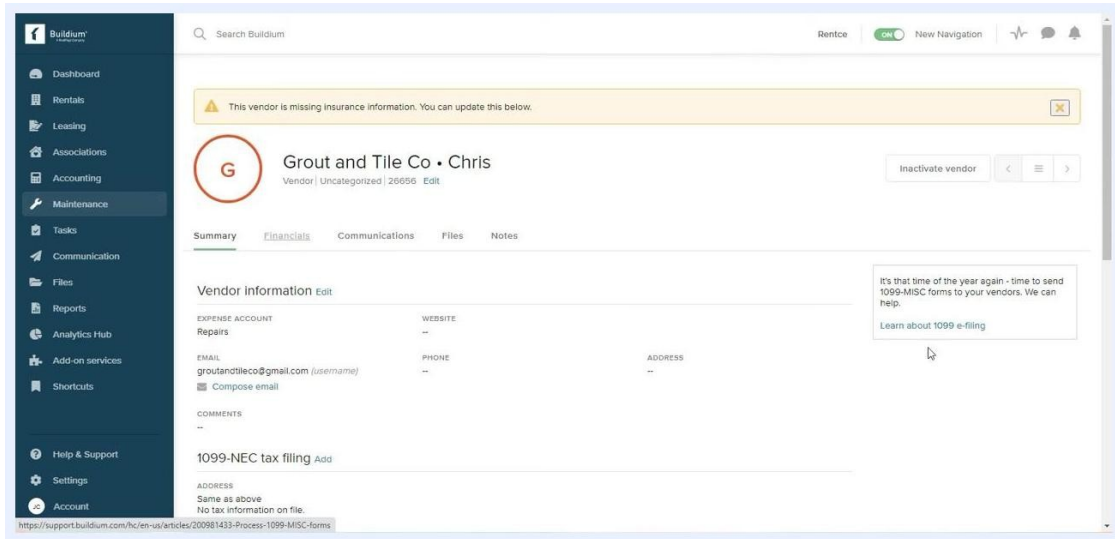
On the vendor summary page, click **Inactivate vendor** in the top right to remove the vendor from your active list. Inactivating a vendor does not delete their record from the system.

Step 8: Edit vendor details or add insurance

Click the **Edit** link next to the vendor name, or in the **Vendor information** section, to update details. Click **Add** in the **Vendor insurance** section to enter or update insurance information.

Step 9: Set up and manage vendor payments

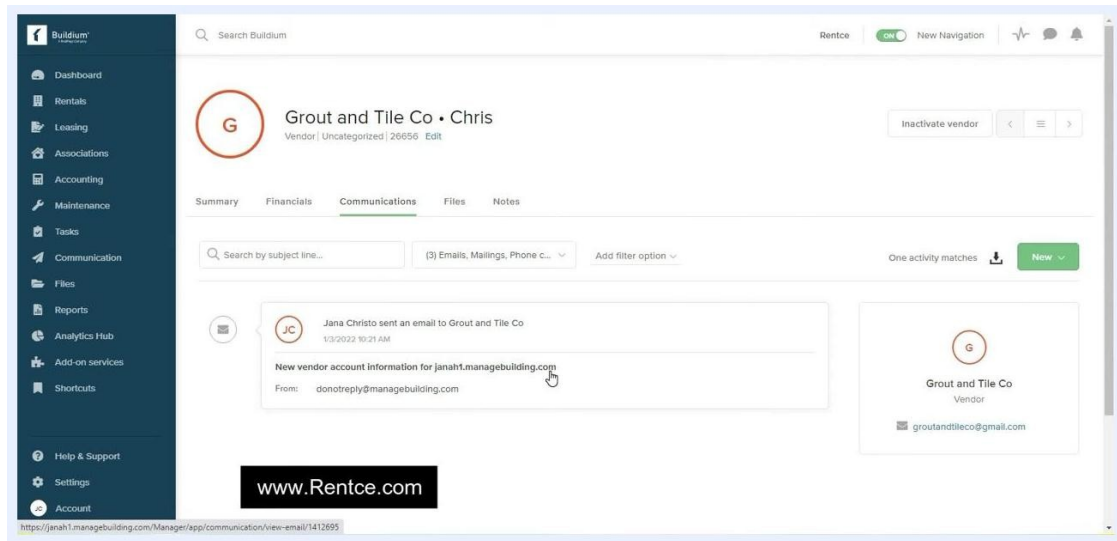
From the vendor summary page, you can set up electronic payment (EFT), pay the vendor by check, record a bill once a repair is completed, and record credits and refunds as needed. Access these options from the **Financials** tab within the vendor profile.



Vendor summary page for "Grout and Tile Co • Chris" with tabs for Summary, Financials, Communications, Files, and Notes. A warning for missing insurance information is visible.

Step 10: Track all vendor communications

Click the **Communications** tab in the vendor profile to view a complete log of emails, phone calls, and other interactions with the vendor. Each entry shows sender and recipient details (for example, "Jana Christo sent an email to Grout and Tile Co"), the subject line and timestamp, and the source email address. Use the search and filter options to locate specific communications.

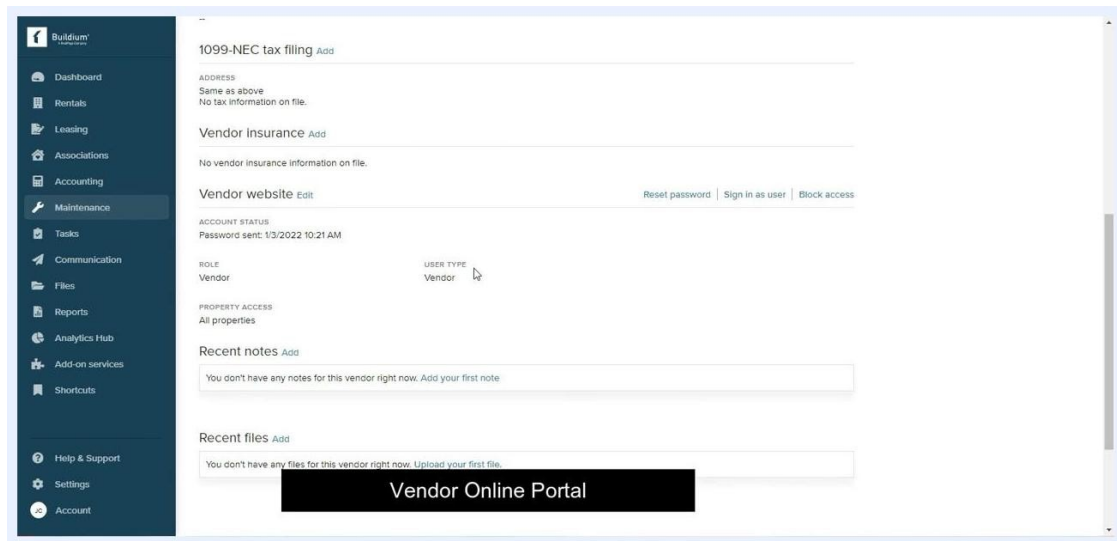


Communications tab showing an email log with sender, subject, and recipient details for Grout and Tile Co • Chris

Managing vendor portal access

Step 11: Send and manage vendor portal access

Confirm that a welcome email and password have been sent to the vendor for portal access. On the vendor summary page, under **Vendor website**, check **Account status** to see when the password was sent (for example, "Password sent: 1/3/2022 10:21 AM"). Use **Reset password** if the vendor needs a new one, click **Sign in as user** to preview the vendor portal as the vendor would see it, or use **Block access** to revoke portal access.



Vendor website section showing account status, role, user type, and options to reset password, sign in as user, and block access

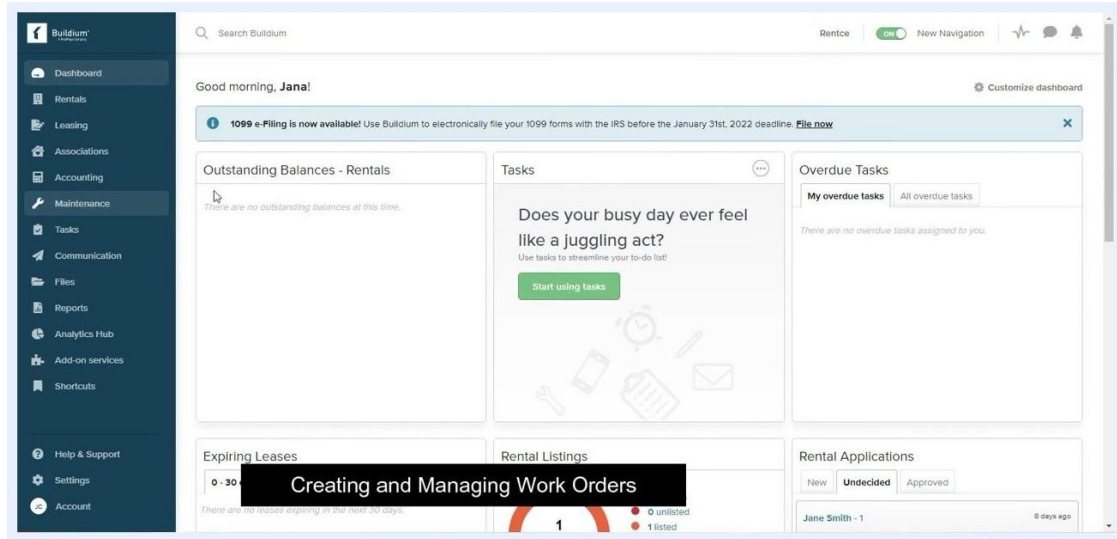
Step 12: Preview the vendor's online portal

When you sign in as the vendor, the first page you see is the **Vendor ledger**, which shows all financial transactions related to the vendor, including bills entered, credits issued, EFTs completed, and checks sent. If there are no transactions, a message indicates this. Vendors can filter transactions by type (Check, Bill, Vendor credit, EFT, Reverse EFT) using the dropdown menu.

Reviewing the vendor ledger

Step 13: Filter transactions by type

At the top of the ledger, locate the **All transaction types** dropdown and click it to reveal filter options: Check, Bill, Vendor credit, EFT, Reverse EFT.



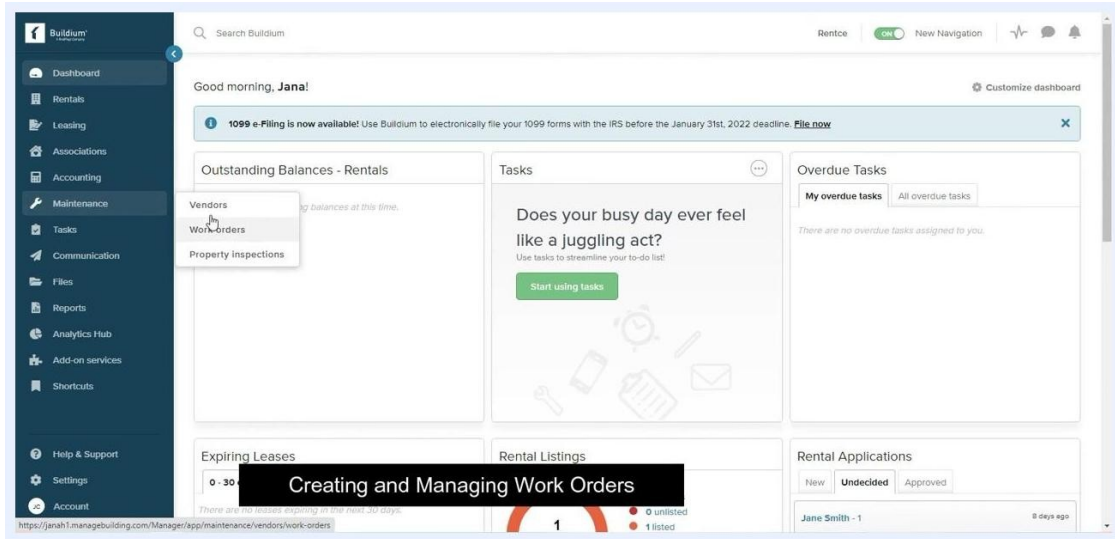
Vendor ledger screen with the transaction type dropdown open, showing options: All transaction types, Check, Bill, Vendor credit, EFT, Reverse EFT. No transactions are currently listed.

Select the transaction type you want to filter the ledger by. If no transactions are displayed, a message appears: "Maybe you don't have any or maybe you need to clear your filters." Click the **clear your filters** link to reset.

Creating a work order in Buildium

Step 14: Open the Work orders page

From the left sidebar, click **Maintenance** to expand its menu, then select **Work orders** from the dropdown list.



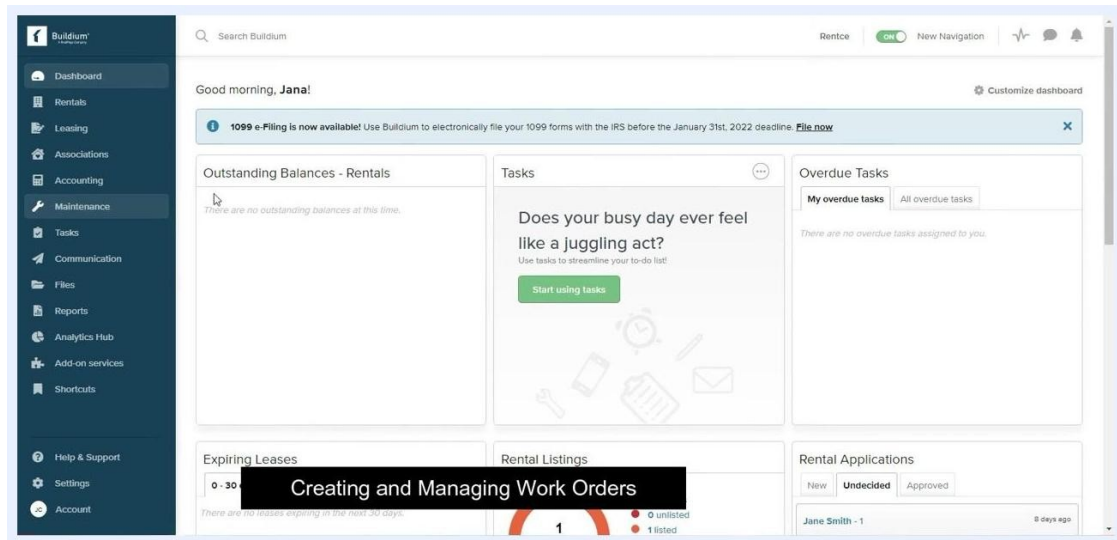
Dashboard screen with the Maintenance menu expanded and the cursor hovering over Work orders. Other options shown: Vendors, Property inspections.

Step 15: Filter work orders by property

On the Work orders page, use the property filter dropdown to select **All properties** or a specific property.

Step 16: Filter work orders by status

Use the status filter dropdown to choose which work order statuses to display. Options include New, In progress, Completed, Deferred, and Closed. By default, "New" and "In progress" are selected.



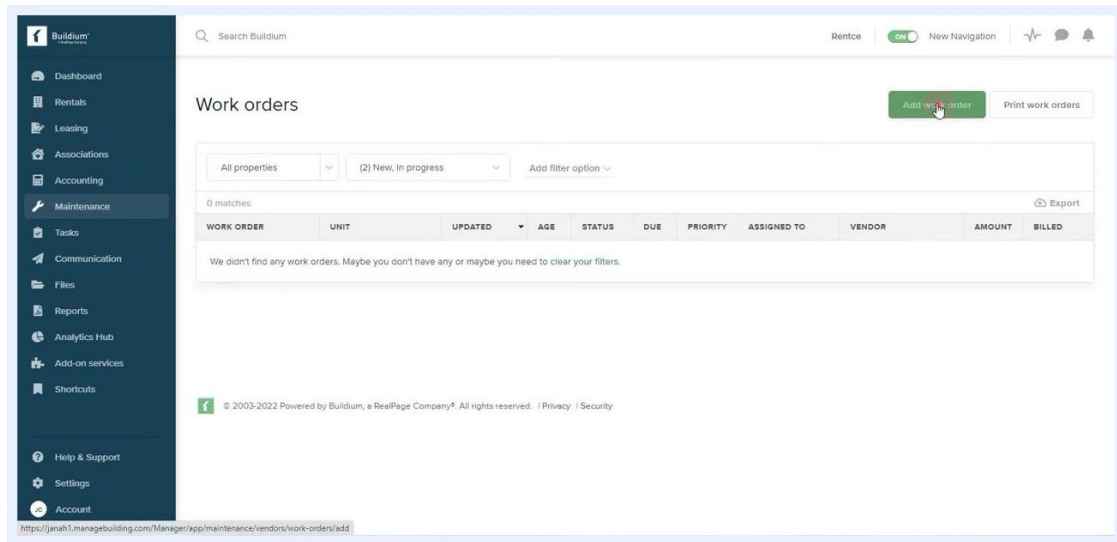
Work orders screen with the status filter dropdown open, showing options: New, In progress, Completed, Deferred, Closed. "New" and "In progress" are checked.

Step 17: Add additional filters

Use the **Add filter option** dropdown to add further filters as needed. If no work orders match your criteria, a message displays: "We didn't find any work orders. Maybe you don't have any or maybe you need to clear your filters."

Step 18: Start a new work order

Click the green **Add work order** button in the upper right corner of the Work orders page to begin creating a new work order.



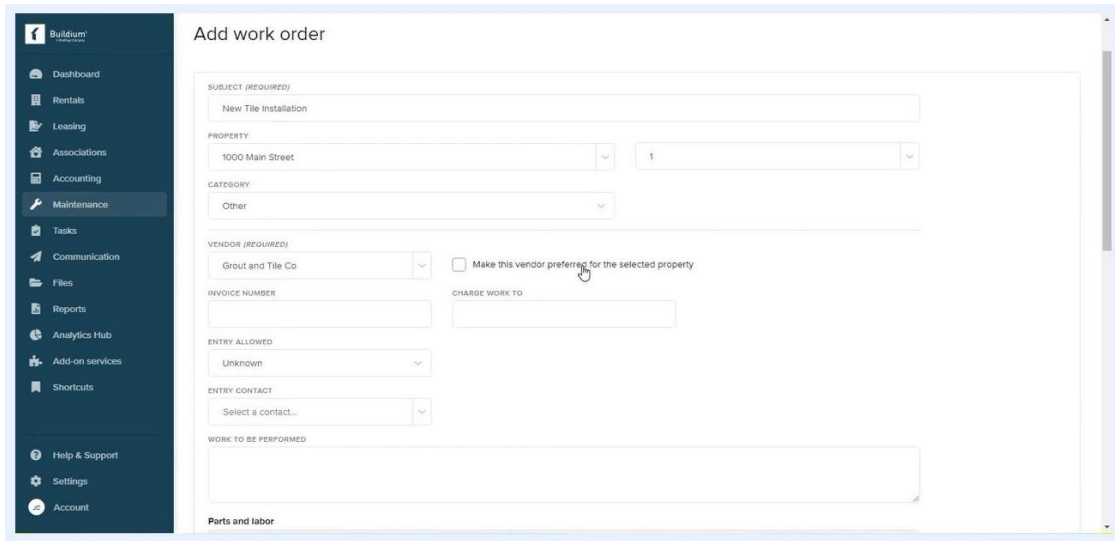
Work orders screen with the cursor clicking the **Add work order** button. No work orders are currently listed.

Step 19: Fill in the core work order details

On the **Add work order** form, enter the following:

- **Subject (Required):** Enter the subject of the work order, for example, "New Tile Installation."
- **Property:** Select the relevant property from the dropdown, for example, "1000 Main Street."
- **Category:** Select the appropriate category, for example, "Other."
- **Vendor (Required):** Select an existing vendor or add a new one, for example, "Grout and Tile Co."
- Optionally check **Make this vendor preferred for the selected property.**
- **Invoice Number:** Enter the invoice number if available.
- **Charge Work To:** Specify the account or entity to be charged.
- **Entry Allowed:** Select the entry permission, for example, "Unknown."
- **Entry Contact:** Select a contact for entry if applicable.

- **Work to be Performed:** Enter a description of the work.



The screenshot shows the 'Add work order' form in the Buildium software. The form is filled with the following information:

- SUBJECT (REQUIRED):** New Tile Installation
- PROPERTY:** 1000 Main Street
- CATEGORY:** Other
- VENDOR (REQUIRED):** Grout and Tile Co. ☐ Make this vendor preferred for the selected property
- INVOICE NUMBER:** (empty)
- CHARGE WORK TO:** (empty)
- ENTRY ALLOWED:** UNKNOWN
- ENTRY CONTACT:** Select a contact...
- WORK TO BE PERFORMED:** (empty)
- Parts and labor:** (empty)

Add work order form filled with: Subject: New Tile Installation, Property: 1000 Main Street, Category: Other, Vendor: Grout and Tile Co. The preferred-vendor checkbox is visible.

Step 20: Enter invoice and charge details

Enter the **Invoice Number** (for example, "125") and specify the **Charge Work To** field if applicable.

Step 21: Set entry permissions

In the **Entry Allowed** dropdown, select the appropriate option — Unknown, Yes, or No — to indicate whether the vendor is permitted to enter the property.

1000 Main Street

CATEGORY
Other

VENDOR (REQUIRED)
Grout and Tile Co

☒ Make this vendor preferred for the selected property

INVOICE NUMBER
125

CHARGE WORK TO

ENTRY ALLOWED
Unknown

Unknown
Yes
No

Parts and labor

QTY	ACCOUNT	DESCRIPTION	PRICE	TOTAL
1	Type or select an account		\$0.00	\$0.00
1	Type or select an account		\$0.00	\$0.00
1	Type or select an account		\$0.00	\$0.00
Total				\$0.00

Entry Allowed dropdown expanded, showing options: Unknown, Yes, No. Other fields filled: Invoice Number 125, vendor preference checked.

Step 22: Assign an entry contact

In the **Entry Contact** dropdown, select the person who will serve as the point of contact for entry, for example, "Stan Smith." The associated email address displays below the contact name once selected.

The screenshot shows the Buildium software interface. On the left is a dark blue sidebar with navigation icons and labels: Dashboard, Rentals, Leasing, Associations, Accounting, Maintenance (highlighted), Tasks, Communication, Files, Reports, Analytics Hub, Add-on services, Shortcuts, Help & Support, Settings, and Account. The main content area is white and contains a form for a property at '1000 Main Street'. The form includes fields for CATEGORY (Other), VENDOR (REQUIRED) (Grout and Tile Co), INVOICE NUMBER (125), ENTRY ALLOWED (Unknown), ENTRY CONTACT (Stan Smith), and a checkbox for 'Make this vendor preferred for the selected property' (checked). Below the contact name, the email address 'chrisivanchev@gmail.com' is displayed. The 'WORK TO BE PERFORMED' field is empty. At the bottom, there is a table for 'Parts and labor' with columns: QTY, ACCOUNT, DESCRIPTION, PRICE, and TOTAL. The table has three rows, each with a quantity of 1, a placeholder 'Type or select an account', a price of \$0.00, and a total of \$0.00. Each row has a small 'X' icon in the right margin.

Entry Contact dropdown with Stan Smith selected, email displayed below. All other fields filled.

Step 23: Describe the work to be performed

In the **Work to be Performed** field, enter a detailed description of the requested work, for example, "Tile Installation quote."

The screenshot shows the same Buildium software interface as before, but the 'WORK TO BE PERFORMED' field is now filled with the text 'Tile Installation quote'. The email address 'chrisivanchev@gmail.com' remains displayed below the contact name. The 'Parts and labor' table at the bottom is also visible, showing three rows with quantities of 1, placeholder account names, prices of \$0.00, and totals of \$0.00.

Work to be Performed field filled with "Tile Installation quote." All other fields completed.

Step 24: Add parts and labor details (optional)

In the **Parts and labor** section, enter line items for quantity, account, description, price, and total as needed. Three blank rows are provided by default for entry.

Step 25: Review all information

Double-check every field for accuracy, including property, vendor, invoice number, entry permissions, contact, and work description, before moving forward.

Step 26: Enter vendor notes

In the **Vendor Notes** field, add any additional instructions or context for the vendor, for example, "The owner requests a quote on tile installation. Call them directly." This note is visible to the vendor and helps clarify the request.

The screenshot displays the Buildium software interface. On the left is a dark blue sidebar with a menu including Dashboard, Rentals, Leasing, Associations, Accounting, Maintenance (highlighted), Tasks, Communication, Files, Reports, Analytics Hub, Add-on services, and Shortcuts. At the bottom of the sidebar are links for Help & Support, Settings, and Account. The main content area is white and shows a form for a work order. At the top, it says 'chrisvanchev@gmail.com' and 'WORK TO BE PERFORMED' with a text box containing 'Tile installation quote'. Below this is the 'Parts and labor' section, which contains a table with columns: QTY, ACCOUNT, DESCRIPTION, PRICE, and TOTAL. The table has three rows, each with '1' in the QTY column and '\$0.00' in the PRICE and TOTAL columns. The ACCOUNT column contains the placeholder text 'Type or select an account'. A 'Total' row at the bottom shows '\$0.00'. Below the table is an 'Add row' button. The 'VENDOR NOTES' section has a text box containing the note: 'The owner requests a quote on tile installation. Call them directly.' Below the notes are fields for 'ASSIGNED TO (REQUIRED)' (set to 'Jana Christo'), 'STATUS' (set to 'New'), 'DUE' (set to 'm/d/yyyy'), and 'PRIORITY' (set to 'Normal'). At the bottom left of the main area is a 'Files' section.

QTY	ACCOUNT	DESCRIPTION	PRICE	TOTAL
1	Type or select an account		\$0.00	\$0.00
1	Type or select an account		\$0.00	\$0.00
1	Type or select an account		\$0.00	\$0.00
Total				\$0.00

Vendor Notes field filled with "The owner requests a quote on tile installation. Call them directly." All other fields completed.

Step 27: Set assignment, due date, and priority

In the **Assigned To (Required)** dropdown, select the responsible staff member, for example, "Jana Christo." In the **Due** field, select a due date using the calendar picker, for example, "1/3/2022." In the **Priority** dropdown, choose the urgency level, for example, "Normal."

The screenshot shows the Buildium software interface. On the left is a dark blue sidebar with navigation links: Dashboard, Rentals, Leasing, Associations, Accounting, Maintenance (selected), Tasks, Communication, Files, Reports, Analytics Hub, Add-on services, Shortcuts, Help & Support, Settings, and Account. The main content area is a form for creating a work order. At the top, there's a table with columns for account type and amount. Below that is a 'Vendor Notes' section with a text area containing 'The owner requests a quote on tile installation. Call them directly.' The 'Assigned To (Required)' dropdown is set to 'Jana Christo'. The 'Status' dropdown is set to 'New'. The 'Due' field has a calendar picker open, showing the date '1/3/2022' selected. The 'Priority' dropdown is set to 'Normal'. At the bottom, there's a 'Files' section with an option to 'Email vendor: groutandtileco@gmail.com'. A green 'Create work order' button and a 'Cancel' button are at the bottom right.

Due date calendar open, Assigned To set to Jana Christo, Priority set to Normal.

Step 28: Attach files (optional)

Click **+ Add attachments** to upload any relevant documents or photos to the work order. Attachments are included in the email to the vendor if you select that option.

Step 29: Select email recipients

Under **Files**, check the box to **Email vendor: groutandtileco@gmail.com** to notify the vendor. Optionally, check **Email rental owner(s): chrislvanchev@gmail.com** to notify the property owner. You can check both boxes to notify both parties.

The screenshot shows the 'New Tile Installation' work order form in the Buildium system. The 'Email vendor' and 'Email rental owner(s)' checkboxes are both checked. The form includes fields for invoice number, entry allowed, work to be performed, parts and labor, and a contacts section with vendor and entry contact information.

QTY	ACCOUNT	DESCRIPTION	PRICE	AMOUNT
Total				\$0.00

Both vendor and rental owner email options checked, ready to send.

Step 30: Create and email the work order

Click the green **Create and email work order** button to submit the work order and send notifications to the selected recipients. If you don't want to notify the owner, uncheck their box before submitting.

The screenshot shows the 'New Tile Installation' work order form in the Buildium system. The 'Email vendor' and 'Email rental owner(s)' checkboxes are both checked. The cursor is clicking the 'Create and email work order' button.

QTY	ACCOUNT	DESCRIPTION	PRICE	AMOUNT
Total				\$0.00

Cursor clicking the "Create and email work order" button, both email options checked.

After submission, a confirmation message appears: "Work order created and emailed to vendor." The system then displays the work order summary, including Subject, Invoice No., Entry Allowed, Work to be Performed, Vendor Notes, Assigned To, Due Date, Priority, and Contacts (Vendor and Entry Contact). From this summary, you can use the available buttons to **Edit details**, **Enter bill**, **Email work order**, **Delete work order**, or **Print task**.

Recording a bill for a work order

Step 31: Open the work order and start a bill

Navigate to the **Tasks** section in the Buildium dashboard. The main panel shows **Work order details**, including Invoice No., Entry Allowed, Work to be Performed, Vendor, Entry Contact, and Location. At the top right, you'll find **Edit details**, **Enter bill**, **Email work order**, and **Delete work order** buttons.

Work order details

[Edit details](#) [Enter bill](#) [Email work order](#) [Delete work order](#)

Details

INVOICE NO. 125 CHARGE WORK TO —

ENTRY ALLOWED? Unknown

WORK TO BE PERFORMED Tile installation quote

Parts and Labor

QTY	ACCOUNT	DESCRIPTION	PRICE	AMOUNT
Total				\$0.00

Vendor notes

The owner requests a quote on tile installation. Call them directly.

Contacts

VENDOR: Grout and Tile Co. Vendor

ENTRY CONTACT: Stan Smith Tenant

Location

1000 Main Street
1615 Hearthview Lane
Seffner, FL 33584

[View on map](#)

Work order details screen with the 'Enter bill' button highlighted, showing invoice, vendor, and property details

Click **Enter bill** to begin recording a bill for the work order.

Step 32: Fill in the bill details

On the **Record bill** screen, enter the Date, Due date, Pay To (vendor name selected from a dropdown), Reference Number, and Memo. You can also upload and view an attachment by dragging and dropping a file or clicking "browse." At the bottom, your options are Save, Save & View, Save & add another, and Cancel.

The screenshot shows the 'Record bill' interface. On the left is a large area for uploading an attachment, with a placeholder image of a document and the text 'Upload and view your attachment here! Drag & drop file here or [browse](#)'. On the right is a form with the following fields:

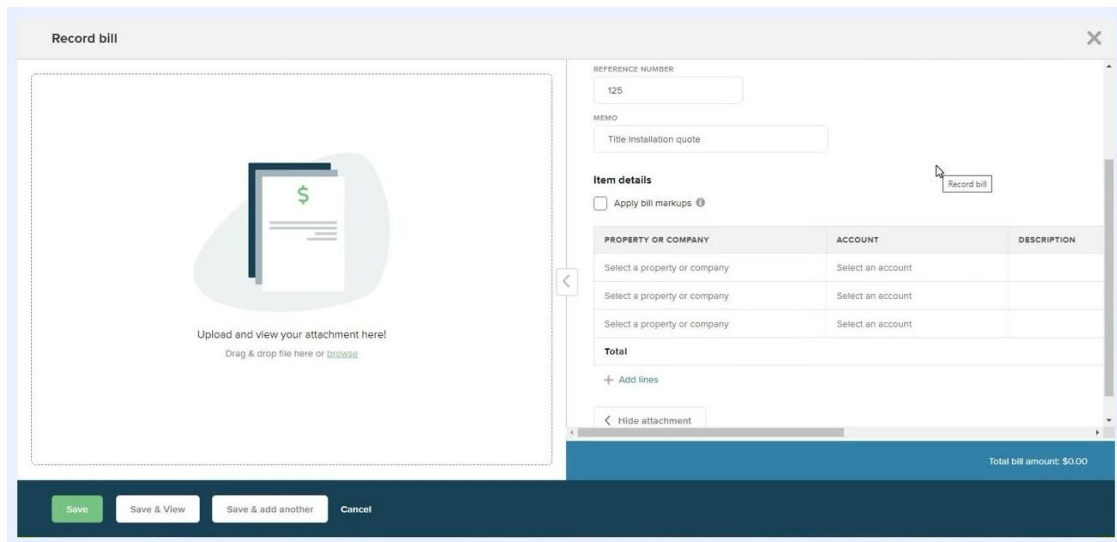
- DATE***: A date picker showing 1/3/2022.
- DUE***: A date picker showing 1/3/2022.
- PAY TO***: A dropdown menu showing 'Grout and Tile Co'.
- + Add vendor**: A button to add a new vendor.
- REFERENCE NUMBER**: A text input field containing '125'.
- MEMO**: A text input field containing 'Tile Installation quote'.
- Item details**: A section with a checkbox 'Apply bill markups' and a table with three columns: 'PROPERTY OR COMPANY', 'ACCOUNT', and 'DESCRIPTION'. The first two columns have dropdown menus for selection.
- Total bill amount**: A blue bar at the bottom right showing '\$0.00'.

At the bottom of the screen are four buttons: 'Save', 'Save & View', 'Save & add another', and 'Cancel'.

Record bill screen with fields for date, due date, pay to, reference number, memo, and attachment upload

Step 33: Apply bill markups if needed

If you need to apply a markup — useful for property managers overseeing vendor work — check the **Apply bill markups** box under Item details.

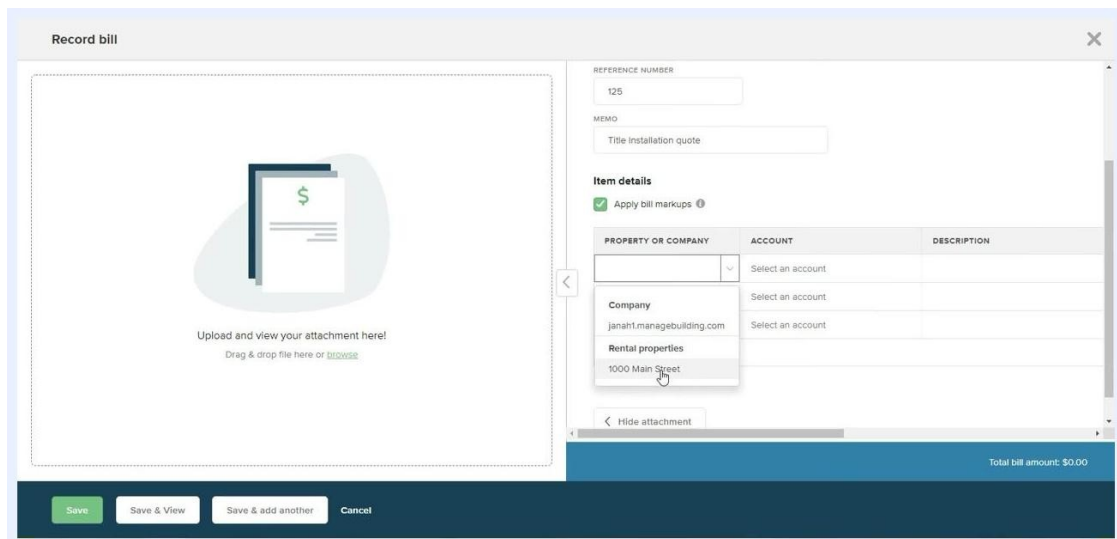


The screenshot shows the 'Record bill' interface. On the left is a large area for uploading attachments, with a placeholder image of a document and the text 'Upload and view your attachment here! Drag & drop file here or [browse](#)'. On the right, the 'REFERENCE NUMBER' is 125 and the 'MEMO' is 'Title Installation quote'. Under 'Item details', the checkbox 'Apply bill markups' is checked. Below this is a table with three columns: 'PROPERTY OR COMPANY', 'ACCOUNT', and 'DESCRIPTION'. The table has three rows, each with a dropdown for 'PROPERTY OR COMPANY' and a text input for 'ACCOUNT'. At the bottom right, the 'Total bill amount' is \$0.00. The bottom bar contains buttons for 'Save', 'Save & View', 'Save & add another', and 'Cancel'.

Record bill screen with 'Apply bill markups' checked and property/company selection visible

Step 34: Select the property or company

Click the dropdown under **Property or Company** and choose **Rental properties** > "1000 Main Street."



This screenshot shows the same 'Record bill' interface as the previous one, but with the 'PROPERTY OR COMPANY' dropdown menu open. The dropdown menu is positioned over the first row of the table and shows two categories: 'Company' and 'Rental properties'. Under 'Company', there is one option: 'janah.managebuilding.com'. Under 'Rental properties', there is one option: '1000 Main Street', which is highlighted by the mouse cursor. The 'Apply bill markups' checkbox remains checked. The 'Total bill amount' is still \$0.00.

Dropdown open under 'Property or Company' with '1000 Main Street' highlighted

Step 35: Select the account and enter a description

Click the dropdown under **Account** and choose the relevant account, such as "Repairs." In the **Description** field, enter a description, for example, "Title Installation."

The screenshot shows the 'Record bill' interface. On the left, there is a large area for uploading an attachment, indicated by a document icon with a dollar sign and the text 'Upload and view your attachment here! Drag & drop file here or [browse](#)'. On the right, there are fields for 'REFERENCE NUMBER' (125) and 'MEMO' (Title Installation quote). Below these is the 'Item details' section, which includes a checkbox for 'Apply bill markups' (checked). A table with three columns: 'PROPERTY OR COMPANY', 'ACCOUNT', and 'DESCRIPTION' is shown. The 'ACCOUNT' dropdown is open, displaying a list of options: 'Depreciation Expense', 'Insurance', 'Landscaping', 'Legal and Professional Fees', 'Licenses and Permits', and 'Management Fees'. The 'DESCRIPTION' field is currently empty. At the bottom right, it says 'Total bill amount: \$0.00'. The bottom navigation bar contains buttons for 'Save', 'Save & View', 'Save & add another', and 'Cancel'.

PROPERTY OR COMPANY	ACCOUNT	DESCRIPTION
1000 Main Street		
Select a property or company		
Select a property or company		
Total		
+ Add lines		
< Hide attachment		

Account dropdown open with options like 'Depreciation Expense', 'Insurance', 'Repairs', and the description field filled

Step 36: Enter the bill amount and markup

In the **Amount** field, enter the bill amount, for example, \$2,000.00. In the **Markup Type** dropdown, select "Percent" or "Amount." If you select "Percent," enter the markup percentage, for example, 10%.

The screenshot shows the 'Record bill' form. On the left is a large area for uploading attachments with a placeholder image of a document with a dollar sign and the text 'Upload and view your attachment here! Drag & drop file here or [browse](#)'. On the right, the 'REFERENCE NUMBER' is 125 and the 'MEMO' is 'Title Installation quote'. Below this is the 'Item details' section with a checked 'Apply bill markups' option. A table lists items with columns 'PROPERTY OR COMPANY', 'ACCOUNT', and 'DESCRIPTION'. The first row shows '1000 Main Street', 'Repairs', and 'Title Installation'. Below the table are '+ Add lines' and '< Hide attachment' buttons. At the bottom right, a blue bar displays 'Total bill amount: \$0.00'. At the bottom are 'Save', 'Save & View', 'Save & add another', and 'Cancel' buttons.

PROPERTY OR COMPANY	ACCOUNT	DESCRIPTION
1000 Main Street	Repairs	Title Installation
Select a property or company	Select an account	
Select a property or company	Select an account	

Markup type dropdown open with options 'None', 'Percent', 'Amount', and \$2,000.00 entered as the amount

Review the calculated markup — for example, \$200.00 for a 10% markup — along with the total bill amount and total markup shown at the bottom right.

This screenshot is identical to the previous one, but the blue bar at the bottom right now displays 'Total bill amount: \$2,000.00 | Total markup: \$200.00', indicating that the bill amount and markup have been entered and calculated.

Record bill screen showing \$2,000.00 amount, 10% markup, and a calculated \$200.00 markup

Step 37: Confirm and save the bill

Before saving, confirm that **Apply bill markups** is checked, the Property or company is set to "1000 Main Street," the Account is set to "Repairs," the Description reads "Title Installation," and the amount and markup are accurate.

The screenshot shows the 'Record bill' interface. On the left, there is a large area for uploading an attachment, with a placeholder image of a document with a dollar sign and the text 'Upload and view your attachment here! Drag & drop file here or [browse](#)'. On the right, there is a form with the following fields:

- REFERENCE NUMBER: 125
- MEMO: Title Installation quote
- Item details: ☒ Apply bill markups ⓘ
- Table with 3 columns: PROPERTY OR COMPANY, ACCOUNT, and DESCRIPTION.

PROPERTY OR COMPANY	ACCOUNT	DESCRIPTION
1000 Main Street	Repairs	Title Installation
Select a property or company	Select an account	
Select a property or company	Select an account	
Total		
+ Add lines		
< Hide attachment		

At the bottom right, the totals are displayed: Total bill amount: \$2,000.00 | Total markup: \$200.00. At the bottom left, there are four buttons: Save, Save & View, Save & add another, and Cancel.

Final review of the bill entry with all fields filled, markup applied, and totals displayed

Click **Save** or **Save & View** to record the bill.

Step 38: Verify the saved bill

After saving, the **Record bill** screen displays the entered details: Reference Number, Memo, the checked "Apply bill markups" box, Property or Company, Account, Description, Total bill amount, and Total markup. You can add additional lines if needed, and attachment options remain available. The bottom bar shows the total bill and markup amounts.

The screenshot shows the 'Record bill' interface. On the left, there's a large area for uploading attachments with a placeholder image of a document with a dollar sign and the text 'Upload and view your attachment here! Drag & drop file here or [browse](#)'. On the right, the 'REFERENCE NUMBER' is 125 and the 'MEMO' is 'Title installation quote'. Below this, the 'Item details' section has a checked box for 'Apply bill markups'. A table shows the bill details:

PROPERTY OR COMPANY	ACCOUNT	DESCRIPTION
1000 Main Street	Repairs	Title installation
Select a property or company	Select an account	
Select a property or company	Select an account	
Total		

Below the table are buttons for '+ Add lines' and '< Hide attachment'. At the bottom right, the totals are displayed: 'Total bill amount: \$2,000.00 | Total markup: \$200.00'. The bottom bar contains buttons for 'Save', 'Save & View', 'Save & add another', and 'Cancel'.

Record bill screen showing saved details, applied markup, and totals at the bottom

Step 39: Return to work order details

Navigate back to the **Work order details** screen for the task. It now displays the Title, Invoice No., Entry Allowed, Work to be Performed, Vendor, Entry Contact, and Location. The **Parts and Labor** section shows \$0.00 since the bill is now recorded separately. Action buttons available include **Edit details**, **View bill**, **Email work order**, and **Delete work order**.

The screenshot shows a 'Record bill' window with a file upload area on the left and a form on the right. The file upload area contains a placeholder image of a document with a dollar sign and the text 'Upload and view your attachment here! Drag & drop file here or [browse](#)'. The form on the right includes a 'REFERENCE NUMBER' field with the value '125', a 'MEMO' field with the value 'Tile installation quote', and an 'Item details' section. The 'Item details' section has a checkbox 'Apply bill markups' which is checked. Below this is a table with three columns: 'PROPERTY OR COMPANY', 'ACCOUNT', and 'DESCRIPTION'. The table contains one row with the values '1000 Main Street', 'Repairs', and 'Tile installation'. Below the table are two rows with the text 'Select a property or company' and 'Select an account'. At the bottom of the table is a 'Total' row. Below the table are two buttons: '+ Add lines' and '< Hide attachment'. At the bottom of the window, there is a blue bar with the text 'Total bill amount: \$2,000.00 | Total markup: \$200.00' and four buttons: 'Save', 'Save & View', 'Save & add another', and 'Cancel'.

PROPERTY OR COMPANY	ACCOUNT	DESCRIPTION
1000 Main Street	Repairs	Tile installation
Select a property or company	Select an account	
Select a property or company	Select an account	
Total		

Work order details screen for 'New Tile Installation' showing invoice, vendor, and contact information

Confirming the financial impact

Step 40: Confirm the bill in the vendor ledger

Navigate to the vendor's section and access the **Vendor ledger** to review transactions. The ledger displays the Date, Number, Ref. No., Type (Bill), Property, Account (Accounts payable), Memo, and Amount — confirming the bill is posted to the vendor's account.

The screenshot shows the Buildium interface for property '1000 Main Street'. The 'Vendors' tab is selected, displaying a table of vendor transactions. The table includes columns for Date, Number, Ref. No., Type (Bill), Property, Account (Accounts payable), Memo, and Amount. A single transaction is visible for Grout and Tile Co. with a date of 1/1/2024, amount of \$2,200.00, and account of 2200.00. The table also shows a summary of income and expenses for the period from January 1 to the current date.

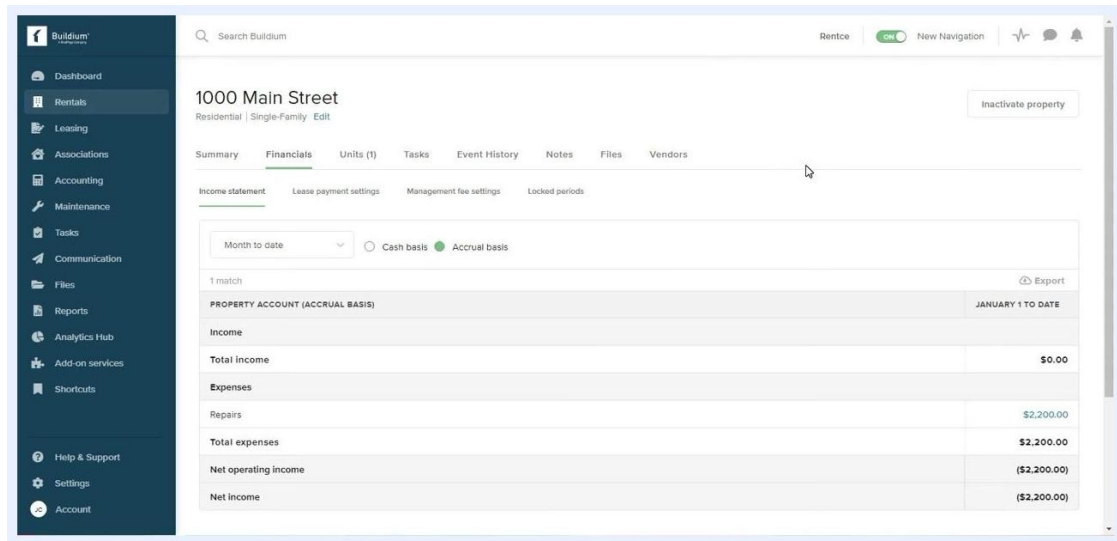
Date	Number	Ref. No.	Type (Bill)	Property	Account (Accounts payable)	Memo	Amount
1/1/2024			Bill	1000 Main Street	2200.00	Grout and Tile Co.	\$2,200.00

PROPERTY ACCOUNT (ACCRUAL BASIS)		JANUARY 1 TO DATE
Income		
Total income		\$0.00
Expenses		
Repairs		\$2,200.00
Total expenses		\$2,200.00
Net operating income		(\$2,200.00)
Net income		(\$2,200.00)

Vendor ledger showing a bill entry for Grout and Tile Co, with all transaction details

Step 41: Review the property's financials

Navigate to **Rentals** > "1000 Main Street" and select the **Financials** tab. Make sure **Accrual basis** is selected rather than "Cash basis." The income statement shows Income, Total income, Expenses (Repairs), Total expenses, Net operating income, and Net income. In this example, the \$2,200.00 expense reflects the \$2,000.00 bill plus the \$200.00 markup.



1000 Main Street
Residential | Single-Family | Edit

Summary **Financials** Units (1) Tasks Event History Notes Files Vendors

Income statement Lease payment settings Management fee settings Locked periods

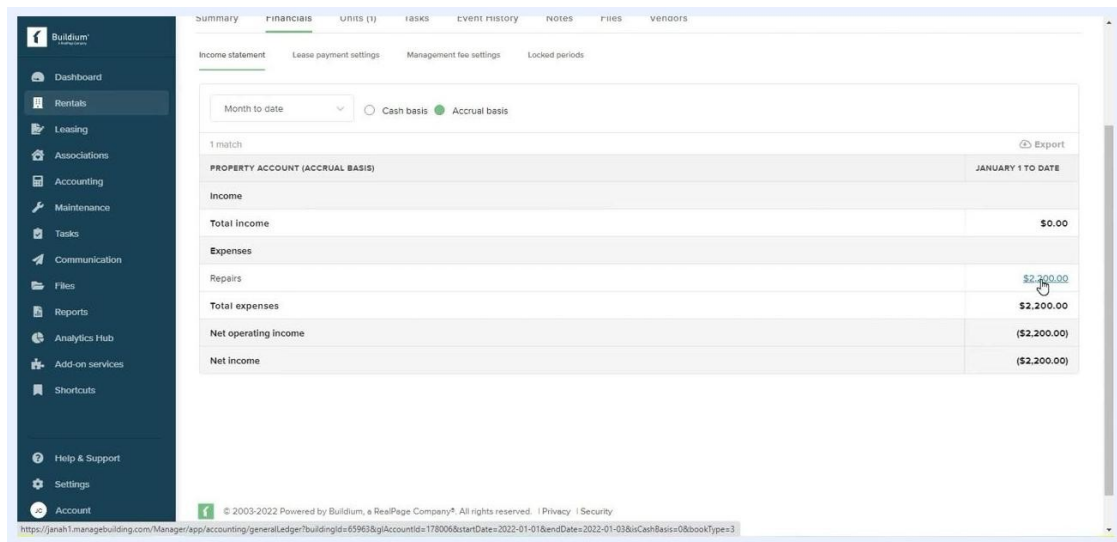
Month to date ☐ Cash basis ☒ Accrual basis

1 match [Export](#)

PROPERTY ACCOUNT (ACCRUAL BASIS)		JANUARY 1 TO DATE
Income		
Total income		\$0.00
Expenses		
Repairs		\$2,200.00
Total expenses		\$2,200.00
Net operating income		(\$2,200.00)
Net Income		(\$2,200.00)

Financials tab for 1000 Main Street showing \$2,200.00 in repairs and total expenses

The owner sees a total expense of \$2,200.00 for the repair: \$2,000.00 goes to the vendor, Grout and Tile Co, while \$200.00 (the 10% markup) is retained by the property manager for overseeing the work. The financials clearly separate the vendor payment from the management fee markup. The owner pays the total amount, and the vendor receives their portion once payment is processed.



The screenshot shows the Buildium Financials tab with the following data:

PROPERTY ACCOUNT (ACCRUAL BASIS)		JANUARY 1 TO DATE
Income		
Total income		\$0.00
Expenses		
Repairs		\$2,000.00
Total expenses		\$2,200.00
Net operating income		(\$2,200.00)
Net income		(\$2,200.00)

Financials tab highlighting the breakdown of expenses and markup for the owner

Step 42: Finalize records and communicate

Once the owner pays the total amount, the vendor receives their payment and the property manager retains the markup. Use **Email work order** or **View bill** to send documentation as needed, and ensure all records are updated and attachments are uploaded for future reference.

The screenshot displays the Buildium Financials interface. The left sidebar contains navigation options: Dashboard, Rentals, Leasing, Associations, Accounting, Maintenance, Tasks, Communication, Files, Reports, Analytics Hub, Add-on services, Shortcuts, Help & Support, Settings, and Account. The main content area shows the 'Financials' tab with sub-tabs for Income statement, Lease payment settings, Management fee settings, and Locked periods. The 'Income statement' sub-tab is active, showing a 'Month to date' filter and radio buttons for 'Cash basis' and 'Accrual basis' (selected). A table titled 'PROPERTY ACCOUNT (ACCRUAL BASIS) JANUARY 1 TO DATE' displays the following data:

PROPERTY ACCOUNT (ACCRUAL BASIS) JANUARY 1 TO DATE	
Income	
Total Income	\$0.00
Expenses	
Repairs	\$2,200.00
Total expenses	\$2,200.00
Net operating income	(\$2,200.00)
Net Income	(\$2,200.00)

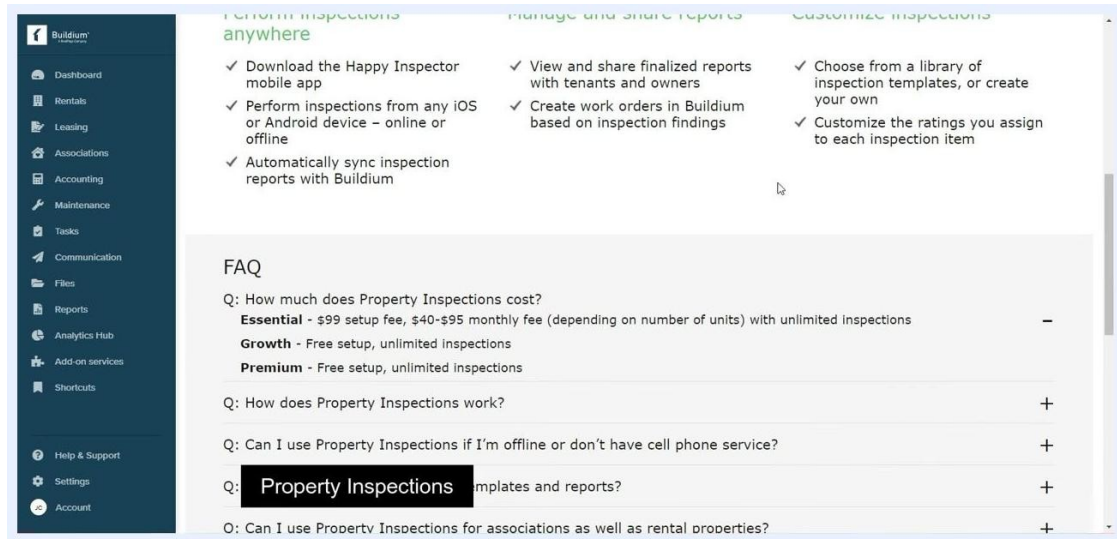
At the bottom of the screen, a copyright notice reads: © 2003-2022 Powered by Buildium, a RealPage Company®. All rights reserved. | Privacy | Security. A URL is also visible: https://jash1.managebuilding.com/Manager/app/accounting/generalLedger/buildingId=65963&glAccountid=178006&startDate=2022-01-01&endDate=2022-01-03&isCashBasis=0&bookType=3.

Financials tab showing the finalized expense and income statement for the property

Using property inspections

Step 43: Open Property Inspections

From the property details screen, hover over or select **Maintenance** in the left sidebar, then click **Property inspections** in the dropdown to access the module. Confirm you're in the correct property context — the financials for 1000 Main Street should still be visible.



Dropdown menu under Maintenance with Property inspections highlighted, financials still visible

Step 44: Review Property Inspections features and pricing

The Property Inspections overview page highlights key features: downloading the Happy Inspector mobile app, performing inspections from any iOS or Android device online or offline, automatically syncing inspection reports with Buildium, viewing and sharing finalized reports with tenants and owners, creating work orders in Buildium based on inspection findings, choosing from a library of inspection templates or building your own, and customizing the ratings assigned to each inspection item.

The FAQ section outlines pricing:

- **Essential Plan:** \$99 setup fee, \$40–\$95 monthly fee depending on number of units, unlimited inspections.
- **Growth Plan:** Free setup, unlimited inspections.

- **Premium Plan:** Free setup, unlimited inspections.

Perform inspections anywhere

- ✓ Download the Happy Inspector mobile app
- ✓ Perform inspections from any iOS or Android device – online or offline
- ✓ Automatically sync inspection reports with Buildium

Manage and share reports

- ✓ View and share finalized reports with tenants and owners
- ✓ Create work orders in Buildium based on inspection findings

Customize inspections

- ✓ Choose from a library of inspection templates, or create your own
- ✓ Customize the ratings you assign to each inspection item

FAQ

Q: How much does Property Inspections cost?

Essential - \$99 setup fee, \$40-\$95 monthly fee (depending on number of units) with unlimited inspections

Growth - Free setup, unlimited inspections

Premium - Free setup, unlimited inspections

Q: How does Property Inspections work?

Q: Can I use Property Inspections if I'm offline or don't have cell phone service?

Q: **Property Inspections** templates and reports?

Q: Can I use Property Inspections for associations as well as rental properties?

Property Inspections FAQ showing Essential, Growth, and Premium plan pricing and features

The FAQ also addresses how Property Inspections work, whether inspections can be performed offline or without cell service, customization options for templates and reports, and how inspections apply to both associations and rental properties. For Growth and Premium plans, setup and inspections are completely free.

Perform inspections anywhere

- ✓ Download the Happy Inspector mobile app
- ✓ Perform inspections from any iOS or Android device – online or offline
- ✓ Automatically sync inspection reports with Buildium

Manage and share reports

- ✓ View and share finalized reports with tenants and owners
- ✓ Create work orders in Buildium based on inspection findings

Customize inspections

- ✓ Choose from a library of inspection templates, or create your own
- ✓ Customize the ratings you assign to each inspection item

FAQ

Q: How much does Property Inspections cost?

Essential - \$99 setup fee, \$40-\$95 monthly fee (depending on number of units) with unlimited inspections

Growth - Free setup, unlimited inspections

Premium - Free setup, unlimited inspections

Q: How does Property Inspections work?

Q: Can I use Property Inspections if I'm offline or don't have cell phone service?

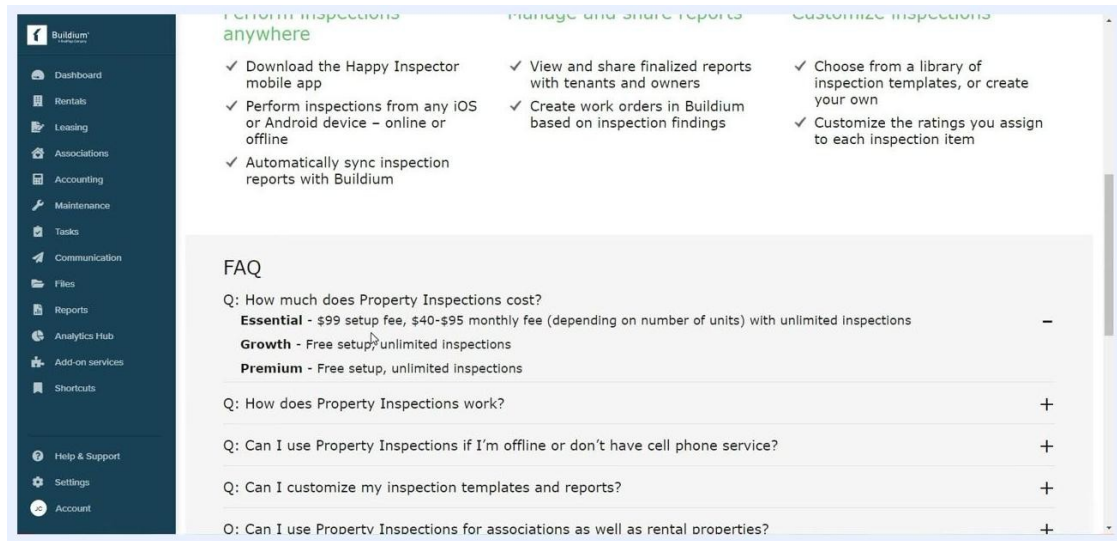
Q: Can I customize my inspection templates and reports?

Q: Can I use Property Inspections for associations as well as rental properties?

FAQ section expanded, highlighting free setup and unlimited inspections for Growth and Premium plans

Step 45: Get started with the Property Inspections dashboard

The main Property Inspections dashboard displays a banner noting that Buildium has teamed up with Happy Inspector to offer mobile property inspections for all your properties and associations. A prominent **Get Started** button appears alongside quick links to Perform inspections anywhere, Manage and share reports, and Customize inspections. Click **Get Started** to begin setting up property inspections.



Property Inspections dashboard with a Get Started button and workspace visuals

What's next

By following these steps, you now know how to create a work order in Buildium, assign it to a vendor, record an associated bill with markup, and confirm how that bill is reflected in both the vendor ledger and the property's financials. From here, you can explore setting up Property Inspections to generate work orders directly from inspection findings, or continue managing vendor communications and payments through the vendor profile's Financials and Communications tabs.