User's Guide

Motili's Contractor Platform

Version 7.14
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motili

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Welcome

Welcome to Motili's Contractor Network. This User Guide provides instructions on how to find and accept a Motili job, upload photos, document the work that you perform, and order additional equipment and parts.

Contact Motili Tech Support

Call 1-800-935-5620 or email Motili Support at customer.support@motili.com.

Quick Start

After you log in to the Motili Platform with your contractor credentials, you'll follow this work-flow.

Review and Accept the Job

- Review your texts and emails to learn about available jobs in your area.
- If you can do the work in the specified time frame, accept the job.

Do the Work

- Arrive at the job site and check in with the Mobile App.
- Take required photos and upload them, along with important comments, using the Mobile App. You can also do this when you return to the office by using your desktop to access the Contractor Platform.
- Repair or replace the equipment.
- If additional equipment or parts are required, add line items to the work order. You can do this in the Mobile App or the Contractor Platform.
- Submit the work order.

Get Paid

- After the work order is submitted and an invoice is generated, you are paid within 15 days.

See Also

- **Motili Software**

Motili Software

You can use the Contractor Platform or the Mobile App to perform jobs for Motili.

Every job through Motili is done electronically. Work orders are dispatched based on your service area radius. Motili automatically sends you an email or text message about available jobs in your area, giving you the general property location and the scheduled date and time for service. If you accept the job, you can use either the Contractor Platform or the Mobile App to upload photos, add details regarding the repairs you made, order any additional parts or equipment, and submit the Work order for payment.

Contractor Platform

If you prefer to upload data and photos later from your office, use the Contractor Platform.

- Upload photos for work orders and quotes.
- Order additional parts or equipment if needed.
- Manage your technicians and their notification method (email or cell).
- Update your company information.

Mobile App

If you want to upload data and photos while you are at the job site, use Motili's Mobile App.

- Download the app from the Apple Store or Google Play. For instructions on downloading and installing the app, go to the Mobile Support Site at https://m.motili.info.
- Upload photos for work orders and quotes.
- Order additional parts or equipment if needed.

See Also

- **How Dispatching Works**

How Dispatching Works

After a Work Order is created, Motili looks for available contractors by dispatching it. If the property is occupied, the tenant picks 3 time slots for the work to be done. The Work Order then contains those 3 time slots. When you accept the job, you can choose the most convenient time slot for you.

Troubleshooting

- **Why am I not getting notifications about jobs?**
  In your company's Team tab, edit the team member and select the Dispatch check box. To enable notification for all jobs for all technicians, select the Back Office check box. See Change Job Notifications.

- **One of my technicians doesn't want emails about new jobs; only text notifications. How do I do that?**
  In your company's Team tab, edit the team member and deselect the Dispatch and Back Office check boxes for the email account. Ensure that Phone (SMS) check box is selected and the Dispatch and Back Office check boxes are selected. See Change Job Notifications.

See Also

- **Use the Contractor Platform**

Use the Contractor Platform

Use the Contractor Platform to check for available jobs, accept a job, complete a work order, upload photos, add parts or equipment, pick a delivery method, submit the work order for payment, and manage your account.

- **See Available Jobs**
- **Accept and Manage Jobs**
- **Learn About Work Orders**
- **Finish a Work Order**
- **Understand Your Payout**
- **Client Ordering**
- **Manage Your Account**

See Available Jobs
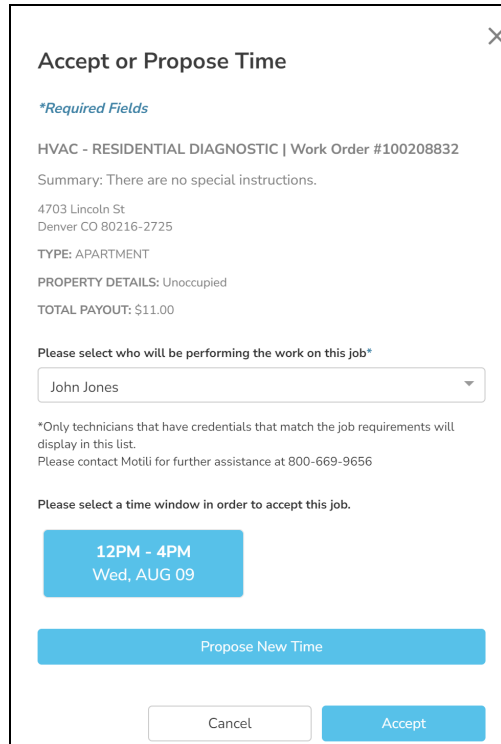
You can easily locate and accept new jobs within your coverage area that you are eligible to accept. You can either accept the job or propose alternate times to complete the work. These work orders have a status of *No Contractor Found* or *Dispatching*.

1. Select Work Orders and click Available Jobs.
2. Click Advanced Filters and determine the type of work and other criteria:
   a. Click Type and choose the type of work you're willing to perform.
   b. Click Distance and choose the radius for your search.
   c. Click Eligibility and choose jobs for which you're eligible or jobs that require more credentials.
3. In Map view, click a pin to select and view a work order's details. If you prefer to see the work orders in a list, click List View.
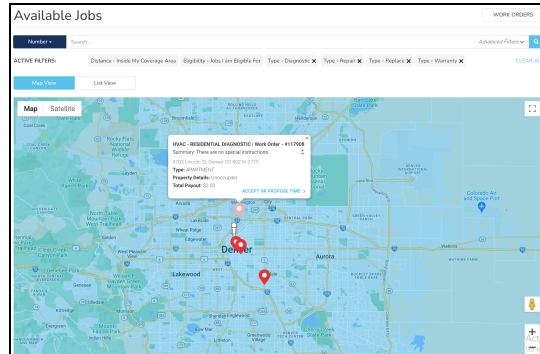
4. Click Accept or Propose Time.
5. Click the drop-down to choose the name of the technician that will be on site.

6. To accept the job and the scheduled time frame:

   a. Select the time frame and click Accept.

   Accept or Propose Time

   Required Fields

   HVAC - RESIDENTIAL DIAGNOSTIC | Work Order #100208832

   Summary: There are no special instructions.

   4703 Lincoln St
   Denver CO 80216-2725

   TYPE: APARTMENT

   PROPERTY DETAILS: Unoccupied

   TOTAL PAYOUT: $11.00

   Please select who will be performing the work on this job*

   John Jones

   *Only technicians that have credentials that match the job requirements will display in this list.
   Please contact Motili for further assistance at 800-669-9656

   Please select a time window in order to accept this job.

   12PM - 4PM
   Wed, AUG 09

   Propose New Time

   Cancel   Accept

   b. Click Confirm. You'll receive an email confirmation and the job automatically goes into your job queue.

7. To accept the job and propose a new date and time:

   a. Click Propose New Time. If there are no times associated with the work order, the only option is to propose new times.

   b. Enter the proposed date and time. If you want to enter more than one pro-posed time, click Add and specify the new date and time. When you propose a new time, Motili is notified and works with you to coordinate and finalize the scheduled time.

   c. Click Submit. Motili is notified of the proposed dates and times and will work with you to coordinate and finalize the scheduled time.

   Tip: Do not show up on-site until a Motili representative confirms the scheduled time with you.

   d. Click Back to Available Jobs.

See Also

- **Accept and Manage Jobs**

Accept and Manage Jobs

You can easily accept a job, reassign a contractor, add an additional contractor to a job, control how the contractor is notified, or decline a job.

Accept a Job

1. When you are notified by email or text that a Motili job is available in your area, click the link to learn more about the job. To check for new jobs, you can also click Available Jobs in the Work Orders page. For more information, check out See Available Jobs.
2. If time slots are available, select the most convenient time for you and click Accept.
3. You'll receive another email or text confirming the time slot, work details, and a map.

Reassign a Contractor

If you find that you cannot complete a job you accepted, you can easily reassign the work order to another technician in your company. The work order must have been accepted by someone in your company and have a status of Created, Delayed, In Progress, In Review, Ordered, or Scheduled.

1. Log into the Contractor Platform.
2. Locate the work order you want to change, click Actions, and choose Reassign.
3. Enter a reason for reassigning the job, select a new team member, and click Reassign.

   Tip: If you are unable to reassign a technician, contact Motili.

Add an Additional Worker

You can add yourself or another technician on your team as an additional worker to a specific work order.

1. In a work order, click Actions and choose Add Worker.
2. Choose a member of the team and click Save.

   Tip: If you haven't added the technician to the team, see Add a Technician.

3. Hover over View Additional Worker to see the name of the worker you selected.
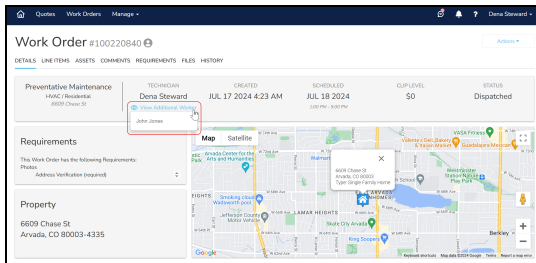
Control Notifications

To determine which technicians receive texts and emails about jobs, the Contractor Owner or Contractor Admin can change notifications. See Change Job Notifications.

Decline a Job

If you are unable to accept a Motili job because you're busy that day or it's out of your coverage area, you can decline the job.

1. Click the link to learn more about the job.
2. Click Decline and pick a reason so that Motili can improve the dispatching process:
   - Job is too far away
   - Payout is too small
   - You are not available at that time
   - Not a good job fit
   - Other
3. Click Decline.

See Also

- **Check In**

Check In

Technicians use a mobile device to check in and complete a work order while on site. For instructions on how to check in with a mobile device, see Starting a Job in the Motili Mobile Support Site.

If there is a problem on-site, such as low connectivity, the technician's device is not working, or the technician forgot to check in, Contractor Owners and Admins can use the Moili Platform to perform a check in and check out for any eligible technician in their company. In the work order, click Actions and choose Start Job to check in the technician, or choose Check Out if the job is completed.
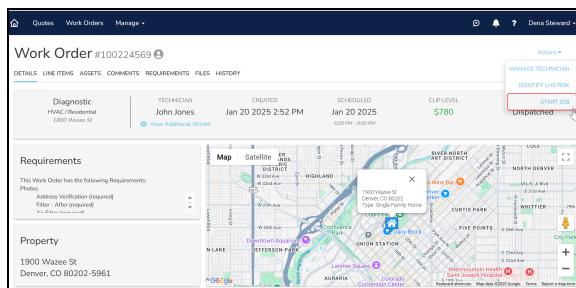
Contractor Managers and Users can only check themselves in or out of a work order.

See Also

- **Learn About Work Orders**

Learn About Work Orders

- **Diagnostic** – Diagnose the system and quote the repair or replacement cost. A Diagnostic fee is included.
- **Inspection** – For an e-commerce order, inspect the equipment that is listed on the work order and update the work order if needed. An Inspection fee is always included.
- **Repair** - Repair the equipment supplied by Motili to reactively fix equipment according to the work order.
- **Replace** -Replace equipment listed in the work order.
- **Walk Through** – Track a client-approved job that Motili completed that still has outstanding work. This type of work order is primarily used for permits and final inspections.
- **Warranty** – For units under a home warranty, track repairs for equipment that was installed or repaired by Motili.
- **Preventative Maintenance** – Used by the Motili Project team to asset tag a large property and indicate assets that need to proactively be repaired or replaced.

Work Order Priority

Work orders are prioritized, so that you know when you must complete the visit. If you have any questions about work orders, call or email Motili Support with any questions or feedback.

- **Emergency** - On-site within 24 hours
- **Urgent** - On-site within 48 hours
- **Routine** - On-site within 96 hours

See Also

- **Understand a Work Order**

Understand a Work Order

Work Order #131639

DETAILS LINE ITEMS ASSETS COMMENTS NOTES REQUIREMENTS FILES FINANCES HISTORY MOBILE NOTIFICATIONS

Schedule

Diagnostic Work Orders do not have a clip level

Actions ▾

Type of Work Order

Job #227272
Diagnostic
HVAC / RESIDENTIAL
Routine

CLIENT
Motili
1600 Glenarm Pl

OWNER
Davis Reynolds

SCHEDULED START
OCT 21 2024 11:00 AM MDT
Created on OCT 16 2024 9:49 AM MDT

CLIP LEVEL
$0

STATUS
Dispatched

Age
9 minutes

Next
Contractor Check In
The work order is scheduled to start in 5 days. We expect the tech to check in prior to the scheduled start to indicate the work order is in process.

Job Site

Property
Motili Property
1600 Glenarm Pl
Denver CO 80202-4311

Technician
Johnny Alvarez
Email - *johnny.alvarez@gmail.com* | Phone - N/A
from A1 Contracting
Phone - United States (+1) (303) 548-5364

👁 View Additional Worker

Motili Property #109505
1600 Glenarm Pl, Denver CO 80202-4311
Type: Single Family Home
Edit Property

External   EDIT

REFERENCE 1
<BLANK>

REFERENCE 2
<BLANK>

PO NUMBER
<BLANK>

Instructions   EDIT

LOCKBOX CODE
<BLANK>

GATE CODE
<BLANK>

SPECIAL INSTRUCTIONS
<BLANK>

Contacts

☐ PROPERTY IS OCCUPIED

CONTACT TYPE	NAME	PREFERRED CONTACT TYPE	EMAIL	MOBILE	PHONE (LANDLINE)	
⭐ General Contractor				United States (+1)	<BLANK>	⋯

ADD

One Primary contact is required on all work orders, including one communication channel. On occupied properties, commercial job types, or inspection work orders, mobile or email is required as a communication channel.

See Also

- **Clip Level**

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Clip Level

The "not-to-exceed" amount that Motili pays for a specific work order. If your costs will exceed that amount, add a line item and Motili will contact the client to get approval. If your costs do *not* exceed the clip level, add the line item and Motili will review and approve it.

See Also

- **Contact Tech Support**

Contact Tech Support

Call 1-800-935-5620 or email Motili Support at customer.support@motili.com.

See Also

- **Finish a Work Order**

Finish a Work Order

Completing a work order involves just a few steps. After you find the work order in the Motili Platform, you'll upload photos, add parts and equipment, pick a delivery method, and submit the work order.

- **Locate Your Work Order**
- **Upload Photos and Files**
- **When to Add Equipment & Parts**
- **Add Equipment and Parts**
- **Pick A Delivery Method**
- **Submit a Work Order**

TIP: You can also use Motili's Mobile App to complete a work order. For more information, see the Mobile Support Site.
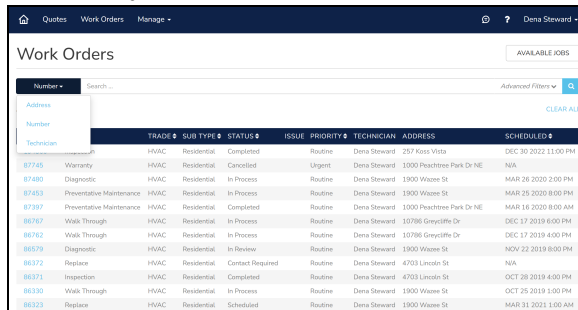
Locate Your Work Order

Your work orders are visible in the Motili Platform when you log in. If you have a large number of work orders, you can filter or search them.

Search

From the Work Order page, click the drop-down next to the Search bar and choose how you want to search: by address, work order number, assigned technician, and so on. You can also type information in the Search bar and click Search.
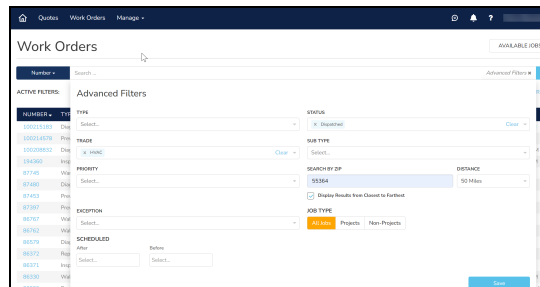

Tip: If you are looking for more work, click Available Jobs.

Filter

See all jobs assigned to you within a specific zip code and radius within that zip code

- On the Advanced Filters dialog, type the zip code.
- Click Radius from Zip Code and choose the size of the area you want to see (for example, a 50-mile radius).
- (Optional) Select Display Results from Closest to Farthest.
- Click Save.

Find a work order for a specific project

- On the Advanced Filters dialog, click Projects under Job Type.

- Click Project and choose the project name.

- Click Save to see all work orders assigned to you for this project. If you don't have any assigned jobs, the Job Type filter does not appear. You can also filter by job type (Diagnostic, Preventative Maintenance, Repair, and so on).

Locate specific types of work orders

- On the Advanced Filters dialog, click Type and choose which work orders to display. You can choose more than one type.

- Click Save.

Tip: Click Clear All to remove all filters.

Use these guidelines when completing a work order:

- You can also use Motili's Mobile App to complete a work order. See the Mobile Support Site.

- You cannot do any work associated with a work order until you check in.

- You can track a work order by changing the job notifications. See Change Job Notifications.

- If you're looking to take on new work, you can view jobs that need a technician by clicking Available Jobs. For more information, go to See Available Jobs.

Troubleshooting

- If the work order just came through, click your browser's Refresh button.

- Motili does not place the equipment order until it is approved by the client.

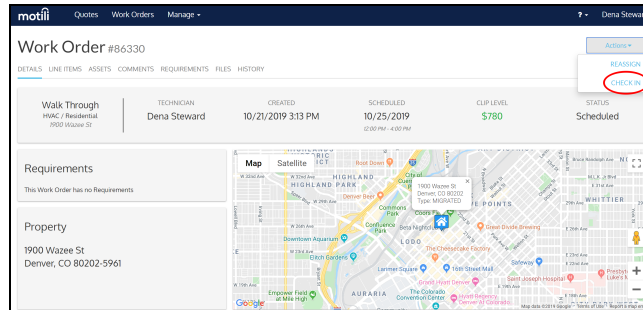- If you don't see your work order, call or email Motili Support.

See Also

- **Upload Photos and Files**

Upload Photos and Files

This step assumes you have performed the work, taken before and after photos, and uploaded photos and supporting files from your mobile device to your desktop.
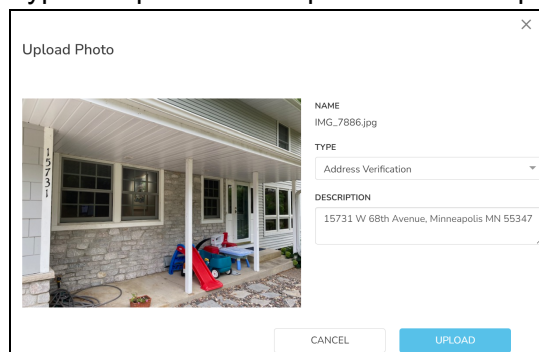
Upload Photos

1. Locate your work order.
2. Click the Actions menu and choose Check In.

💡 **Tip:** You can also use the Mobile App to check in and upload photos.

3. Select the Line Items tab and review the job.
4. Select the Requirements tab and go to the Photos section.
5. Drag the photo to the Photos section or click the link to locate a file to upload. If specific types of photos are required, they are listed in the Requirements section.
6. Select the photo and click Open.
7. Click Type and choose the type of photo. For example, Address Verification.
8. Type an optional description and click Upload.

💡 **Tip:** When a photo requirement is requested but is not needed for the job, go to Click Here if Photo Requirement is Not Applicable, select the photo type, and click Upload.

9. Repeat this step for all photos.

Each photo you add to a work order must be unique. Depending on client restrictions, if you reuse a photo from another work order, the photo can be rejected. You should remove duplicate photos from the work order.

Add Files

You can attach supporting documentation, such as work permits, warranty information, receipts, and owner's manuals to the work order.

1. In the work order, click Files.

2. Drag and drop a file to this area or click the link to select a file.

   Tip: You can rename the file if needed.

3. In the Upload File dialog, click Type and choose a file type, and click Upload.

See Also

- **When to Add Equipment & Parts**

When to Add Equipment & Parts

If you need to order additional parts or equipment that are not in the original work order, use these guidelines.

Below the Clip Level

If the items you need to add are below the clip level, add the line items to the work order and submit the work order. No further action is necessary because these items are already approved. You will be paid for all work.

Above the Clip Level

If the items you need to add are over the clip level, go ahead and add them to the work order. See Add Equipment and Parts. A quote is automatically generated when you submit the original work order. Motili will review and approve the quote and you will be notified when further action is necessary.

See Also

- **Add Equipment and Parts**

Add Equipment and Parts

To add additional equipment, parts, or labor to a work order you need to add a line item and use the Product Selector.

If the line items are below the clip level in the work order, perform the work and submit the work order.

If the line items exceed the clip level in the work order, a quote with the line items is automatically generated and sent to Motili for review and approval. **Do not perform any work on site until you get approval from Motili.**

1. Select the Line Items tab in the work order.

   Tip: If the Add action in the Line Items tab is grayed out, you might need to click Actions and choose Start Job.

2. Click Add in the Line Items section.

3. (Optional) Refine your search using one or more of these methods:

   - **Free Form** - Choose Free Form, type a search term such as a product name or description like *split air conditioner*, and press Enter to see the results.
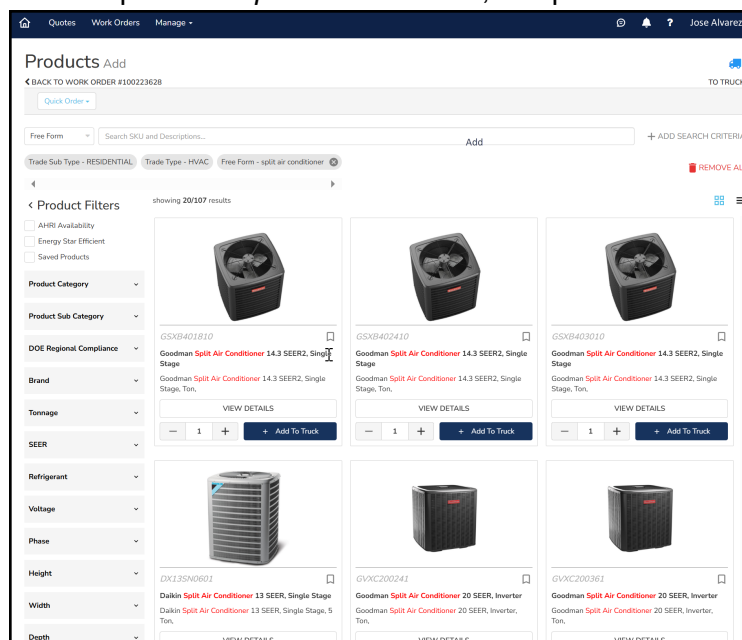
- **SKU** - Choose SKU, type the desired SKU, and press Enter.
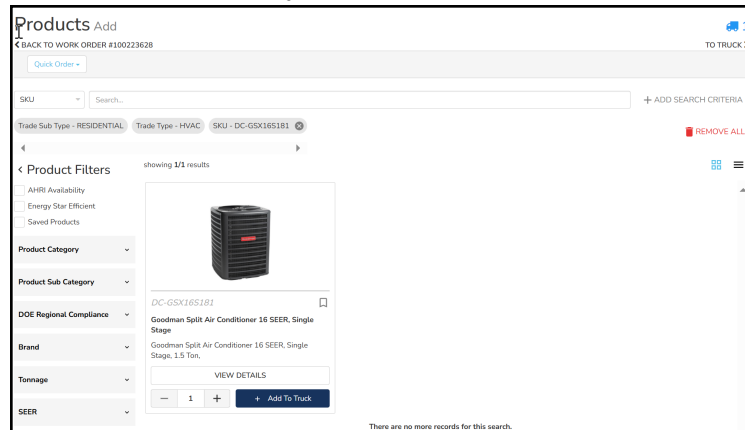
- **AHRI Number** - Choose AHRI, type the Air Conditioning, Heating, and Refrigeration Institute (AHRI) number, and press Enter. An AHRI number is a unique ID for heat pump and furnace components that were tested as one system. Parts do not have AHRI numbers.

  You can then click AHRI Matchup in the results and then View Details to get more information about the equipment. Clicking Table View or Card View changes how the results are displayed.
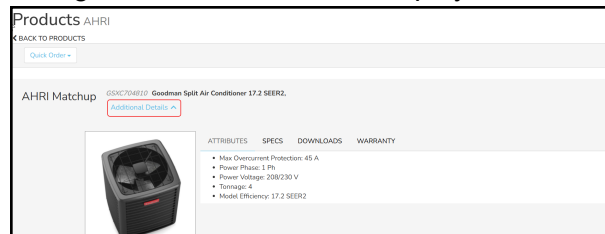
- **Tonnage** - Choose Tonnage, select one or more Tonnage check boxes in the filter, and press Enter. For example, select 1.5 and 2 tons.
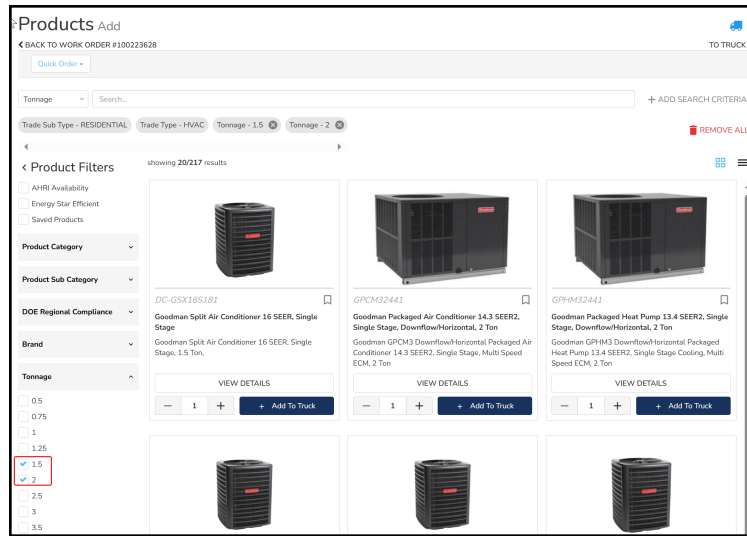
- **Width** - Choose Width, select one or more Width check boxes in the filter, and press Enter.

4. You can further refine your results using product filters, categories, subcategories, and attributes:

   If you are a contractor ordering equipment on behalf of a client, you'll only be able to filter and search products that are available to that client. Pricing is only visible to the client. If you are ordering a bundle, select Bundle for Product Category.

   - **AHRI Availability** - Select this checkbox to only see equipment that has an AHRI number.

- **Energy Star Efficient** - Select this checkbox to see appliances that are cer-
 tified as efficient by the Department of Energy.
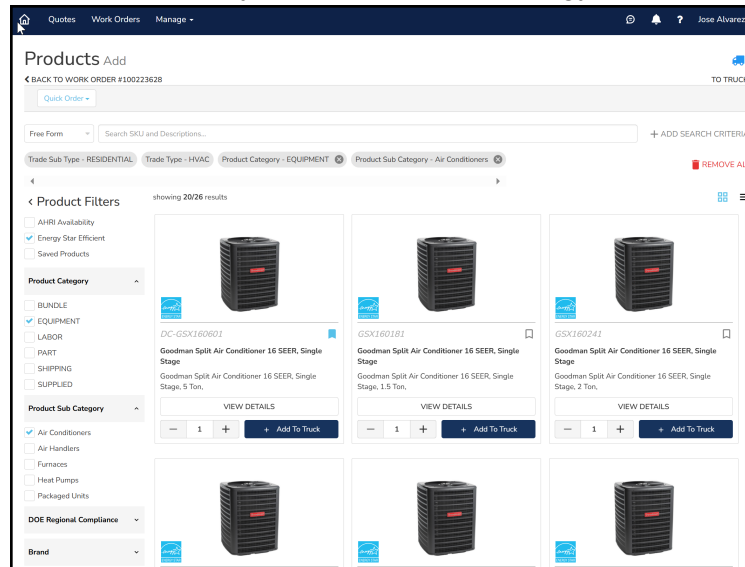
- **Saved Products** - Select this checkbox to only see products that you have
  saved. These are often frequently-purchased items. To save product, click
  the Bookmark icon.

5. When you locate the item, click View Details. The Attributes tab contains product
   details like refrigerant type, SEER, tonnage, and size. Select other tabs to see more
   details:

   - **Specs** - See product benefits and engineering features for this product.
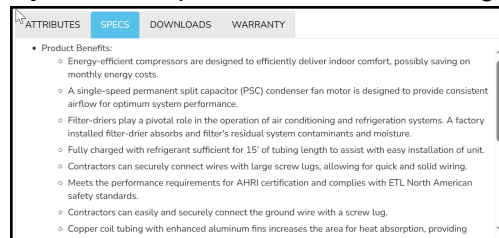
   - **Downloads** - View PDFs of accessories, parts, installation guides, etc.
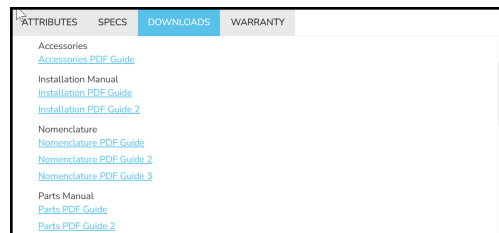
- **Warranty** - Display parts warranties for residential, multi-family, and commercial equipment.

ATTRIBUTES	SPECS	DOWNLOADS	WARRANTY

- Registered Parts Warranty Commercial: ALL PARTS - 5 YEARS PARTS
- Registered Parts Warranty Multi-Family: ALL PARTS - 10 YEARS PARTS
- Registered Parts Warranty Residential: ALL PARTS - 10 YEARS PARTS
- Standard Parts Warranty Commercial: ALL PARTS - 5 YEARS PARTS
- Standard Parts Warranty Multifamily: ALL PARTS - 5 YEARS PARTS
- Standard Parts Warranty Residential: ALL PARTS - 5 YEARS PARTS

6. Verify the Quantity and click Add to Truck. The number of items in the truck increases. Contractors and clients can see this and the payout, while the client can also see the equipment price as shown below.

Goodman Split Air Conditioner 16 SEER, Single Stage ✕

DC-GSX160181

Power Equipment Direct/eCo...   Price:
$684.45
Installation Payout:
View

ITEM DESCRIPTION

Goodman Split Air Conditioner 16 SEER, Single Stage, 1.5 Ton,

−   1   +   + Add To Truck

ATTRIBUTES	SPECS	DOWNLOADS	WARRANTY

- EER HSVTC: 12.2
- Energy Star Certified: Yes
- Refrigerant Type: R-410A
- SEER: 14.5
- Unit Height: 32-1/2 in
- Unit Width: 29-1/4 in
- Regional Compliance:
  - North
  - Southeast
  - Southwest
- Cooling Capacity Nominal: 18000 Btu/H
- Max Overcurrent Protection: 20 A
- Power Phase: 1 Ph
- Power Voltage: 208/230 V
- Compressor Stages: Single Stage

Equipment and Parts subject to availability; like for like substitutions may be made on an as-needed basis

7. Click To Truck to review the items. Supplied SKUs for custom equipment also appear here.

8. Pick A Delivery Method.

9. Click Save for Later to save the items in the truck. If additional work is required, a separate quote is automatically created.

10. Submit a Work Order.

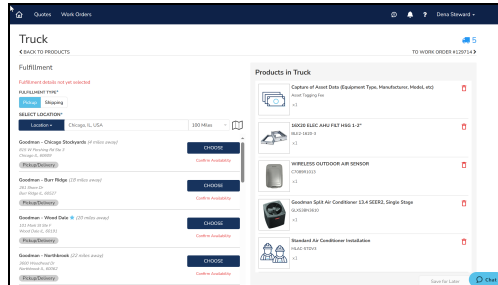The original work order will be closed and paid, and Motili will approve the new quote.

See Also

- **Pick A Delivery Method**

Pick A Delivery Method

1. Choose one of these fulfillment types:

   a. Click Pickup and choose a convenient Distribution Center. The number of miles to each vendor is displayed.

   Tip: [Create a Preferred Pickup Location](#).

   b. Click Shipping and enter the required information, which can be one of the following:

      - The property address.

      - Your office.

      - Another location (add the address).The shipping address must be a US Postal address. Shipping is allowed only if there is no Distribution Center within 100 miles of the property.

2. Click Choose.

See Also

- **Submit a Work Order**
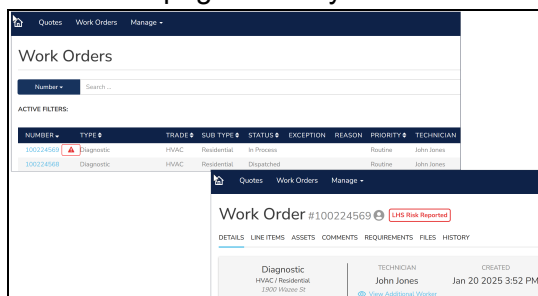
Submit a Work Order

- Before you submit a work order in the Motili Platform, you can review Comments from Motili and also communicate important information to Motili. A red dot at the top of the work order or quote indicates that you have a Comment from Motili.

    To read the Comment, open the work order and select the Comments tab. Respond by clicking Add and typing a message. You can dismiss the comment by clicking the red dot at the top of the work order, clicking the ellipsis, and choosing Mark as Read.

- If you're submitting a work order for an employee:

    - Contractor Owners and Admins can submit the work order after all require-ments have been fulfilled. After submission, any other technicians who are checked in will be checked out.

    - Contractor Managers and Users can submit the work order after checking in and out and all work order requirements have been fulfilled, even if other tech-nicians are still checked in. After submission, any other technicians who are checked in will be checked out.

- When you click Submit on a work order, you must identify if there is a Life Health Safety (LHS) risk on-site. The LHS risk can be related to the property or the equip-ment and is captured with associated reasons, explanations, and supporting pho-tos. After you click Submit on a work order that has an LHS risk, complete the questions that appear.

    If you added an LHS risk, a red badge appears on the work order itself and on the Work Order page so that you can monitor and manage that work.

- After you submit a work order, it goes into an *In Review* status. Motili reviews it and changes the status to *Completed*, and it is ready to be paid.

- If you added additional parts or equipment that are over the clip level, a quote is automatically generated and Motili will review it. Locate the quote in the Quotes menu.

- You'll be notified when the equipment and parts order arrives. See Locate Your Equipment Order.

See Also

- **Understand Your Payout**

Understand Your Payout

Motili automatically generates an invoice for each job that you complete.

- **How Much Will I Get Paid?**
- **When Do I Perform the Work?**
- **When Will I Get Paid?**

How Much Will I Get Paid?

Motili provides the equipment and parts for most jobs. The labor payout you receive is based on the average time it takes to repair or replace standard equipment. For example, a Goodman condenser requires 5 hours to uninstall the old one and install a new one. An evaporator coil requires 3.5 hours to uninstall and install.

- The hourly labor payout is based on the property zip code and fair-market competitive pricing.
- The payout for the service call is included in the clip level of the work order.
- You will pay for necessary permits, but Motili reimburses you when you provide a receipt.
- You will pay for any consumables needed to perform the job.

See Also

- **When Do I Perform the Work?**

When Do I Perform the Work?

When you sign up as a Motili contractor, you agree to complete jobs according to different Service Level Agreements time frames.

- Planned work - The contractor works with the equipment supplied by Motili and performs repairs or replacements according to the work order.
- Unplanned work - The contractor diagnoses and inspects the equipment as needed, recommends a solution, and performs the repair or replacement. These are the expected response and resolution times for unplanned work from creation to completion.

Response and Resolution Times for Unplanned Work			
	Routine	Urgent	Emergency
On-site	Within 4 days	Within 48 hours	Within 24 hours
Service Call	4 days or less	4 days or less	3 days or less
Repair/Replace	7 days or less	4 days or less	2 days or less
Quote or Repairs Completed	Within 24 hours (if quote submitted, repairs are complete within 3 days)	Within 24 hours (if quote submitted, repairs are complete within 3 days)	Within 24 hours (if quote submitted, repairs are complete within 2 days)

See Also

- **When Will I Get Paid?**

When Will I Get Paid?

- After you complete the work, you must submit the work order.
- Motili reviews the job and updates the status from *In Review* to *Completed*.
- When the job is in a *Completed* state, Motili generates an invoice and your payment is processed within 15 days.
- To set up direct deposit for your work, contact Motili at 1-800-935-5620.

See Also

- **Order Equipment for Directed Supply**

Order Equipment for Directed Supply

Motili's Directed Supply (DS) program allows clients to authorize contractors to place orders on their behalf. Each authorization can be configured to set order approval limits, required information input, and determine which entity is responsible for the invoice. Contact your Motili representative to be configured for DS.

Client Invoiced

- A contractor orders equipment on behalf of the client, and the client is invoiced and pays for the order.

Contractor Invoiced

- A contractor orders equipment on behalf of the client, the contractor is invoiced and pays for the order.

For more information about how clients and contractors and clients place orders for DS equipment, see Client Ordering and Contractor Ordering.

See Also

- **Client Ordering**

Client Ordering

Motili's Directed Supply (DS) program lets you authorize contractors in your network to place an equipment order on your behalf and choose who will be invoiced.
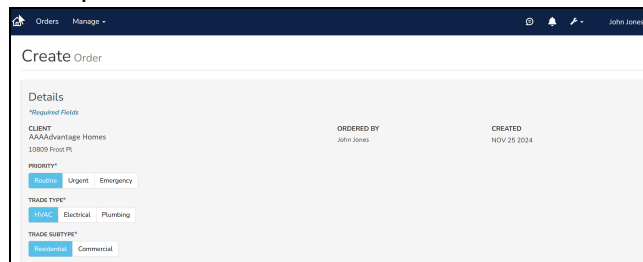
Use one of these methods to place an equipment order:

- Order directly through the Motili Platform.
- Use Directed Supply to authorize a contractor to purchase equipment on your behalf. You can choose to be invoiced for the order or have the contractor invoiced.

To authorize contractors to purchase equipment on your behalf, contact your Motili representative to be configured for DS. For more information, see Contractor Ordering.

Create an Order

1. Use your client credentials to log into the Motili Platform.
2. Go to Orders, click Actions, and choose Create. If you don't see the Orders menu, contact your Motili representative.
   You can also check equipment availability before you place the order (see Check Equipment Availability).
3. Your client name appears on the order. If you don't see the Orders menu, you are not configured to use DS and you should contact your Motili representative. This example shows a client-invoiced order.

4. Change the Priority, Trade Type, and Trade Subtype if needed.
5. In the Fulfillment section, select Delivery or Pick Up and enter the information. If you choose Pick Up, you'll select a Distribution Center. If you choose Delivery, Motili's software finds the closest location with in-stock equipment.
6. In the Reference section, complete any required fields. You might need to add your PO number or work order number.
7. In the Instructions section, add any important notes. For example, *Needed by 7/1. No liftgate on site*.
8. In the Contact section, select the contact type and add the required information. You can add more than one contact.

9. In the Notifications section, select the level of notifications you want to receive.

10. Click Add Contact to save the information.

11. Click Next.

12. In the Product page, go to the Product Filters section and select the appropriate product category and subcategories, and review the resulting list of products. As a DS client, you can only filter and search products that are available to you. Pricing is always visible to you.

    Tip: Use the Search bar to type product names or SKUs .

13. When you locate the item, click View Details.
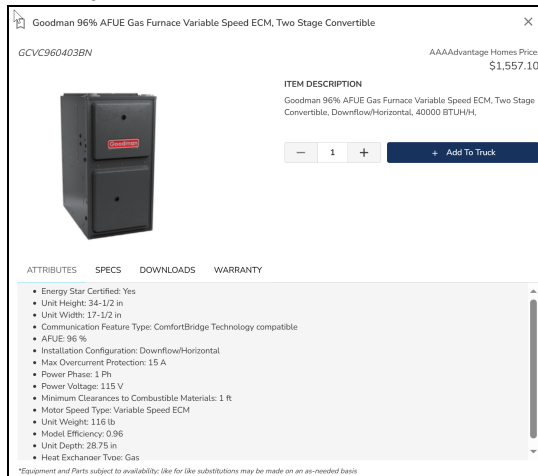
    The Attributes tab contains product details like refrigerant type, SEER, tonnage, and size.

14. Select other tabs to see more details:

    - **Specs** - See product benefits and engineering features for this product.

    - **Downloads** - View PDFs of accessories, parts, installation guides, etc.

- **Warranty** - Display parts warranties for residential, multi-family, and commercial equipment.

15. Verify the Quantity and click Add to Truck.

16. Click the truck, click Order, review the information, and click Order again at the confirmation screen. If the equipment is in stock, the order automatically generates a vendor order number. If the equipment is not in stock, the order goes to Submitted status and a Motili representative will work your order to get the vendor order number.

17. After you place the order, select the Line Items tab to review it. You can click the Truck icon to go directly to the order.

18. When the equipment is ready, review the text and email notifications you received.

19. (Optional) If you need to add supporting information, such as Proof of Delivery (POD) or Proof of Return (POR), select the Files tab, upload the file, click Type and choose the type, and click Upload.

20. To view and manage your invoices, see Manage DS Invoices.

Tip: To learn how contractors can order DS equipment on your behalf, see Contractor Ordering.

See Also

- **Contractor Ordering**

Contractor Ordering

Motili's Directed Supply (DS) program allows contractors to be set up in multiple ways in order to place equipment orders. Contact your Motili representative to be configured for DS.

Depending on the configuration, DS contractors can place these types of DS orders:

Order on Behalf

- Order equipment on behalf of the client and the client is invoiced and pays for the order.
- Order equipment on behalf of the client and you are invoiced and pay for the order.

Self Order

- Order equipment for yourself, you are invoiced, and you pay for the order.

DS clients can also order equipment. See Client Ordering.

Create an Order

You must be configured by your Motili representative for self ordering or ordering on behalf of a client.

1. Use your contractor credentials to log into the Motili Platform. If you don't see the Orders menu, you are not configured to use DS and you should contact your Motili representative.
2. Go to Orders, click Actions, and choose Create.
   - To order on behalf of a client and send the invoice directly to the client, select Order on Behalf, and select the client paying for the invoice. The client's name appears in the Paid By field and the contractor is in the Ordered By field.

   - To order on behalf of a client and send the invoice to yourself, select Order on Behalf, select the client, and your buying account appears in the Paid By field.

You will pay for the client's equipment and invoice them later.

- To order equipment for yourself, select Self Order. Your buying account appears in the Paid By field, which ensures that you pay for your own equipment.


3. Change the Priority, Trade Type, and Trade Subtype choices if needed.

4. In the Fulfillment section, select Delivery or Pick Up and enter the information. If you chopse Pick Up, you'll select a Distribution Center. If you choose Delivery, Motili's software finds the closest location with in-stock equipment.

5. In the Reference section, complete any required fields.

6. In the Instructions section, add any important notes. For example, Needed by 7/1. No liftgate on site.

7. In the Contact section, select the contact type and add the required information. You can add more than one contact.

8. In the Notifications section, select the level of notifications you want to receive.

9. Click Add Contact to save the information.

10. Click Next.

11. In the Product Selector, go to the Filters section and select the appropriate product category and subcategories, and review the resulting list of products. You can also If you are a DS contractor ordering equipment on behalf of a DS client, you can only filter and search for products that are available to that client. Use the Search bar to type product names or SKUs.

Tip: Pricing is visible if you are placing a self order or ordering on behalf of the

client and then invoicing the client. Pricing is not visible if you are ordering on behalf of a client but the client is being invoiced directly.
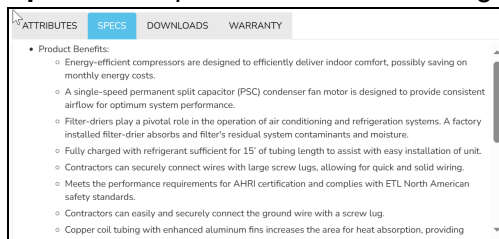
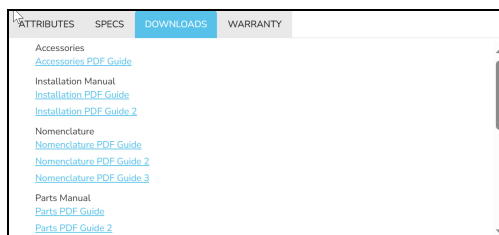12. When you locate the item, click View Details.
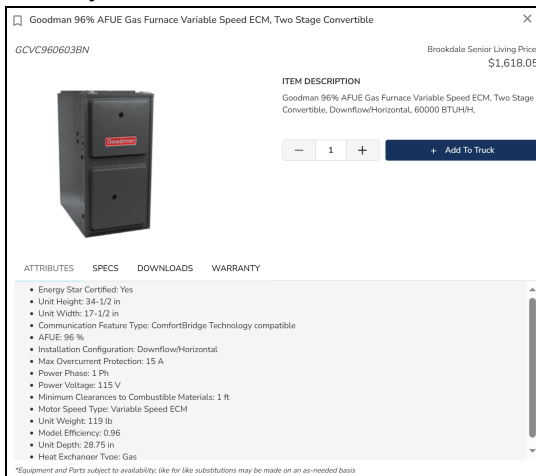
The Attributes tab contains product details like refrigerant type, SEER, tonnage, and size.
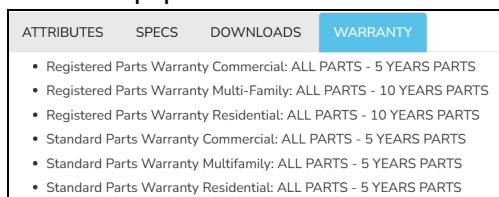
13. Select other tabs to see more details:

- **Specs** - See product benefits and engineering features for this product.

- **Downloads** - View PDFs of accessories, parts, installation guides, etc.

- **Warranty** - Display parts warranties for residential, multi-family, and commercial equipment.

14. Verify the Quantity and click Add to Truck. The number of items in the truck increases. The equipment price appears here if it is a self order or ordered on behalf of a client and you are paying for the order.

15. Click To Truck to review the items. Supplied SKUs for custom equipment also appear here. You can also check equipment availability before you create and place the order (see Check Equipment Availability).

16. Click Order, review the information, and click Order again at the confirmation screen. If the equipment is in stock, the order automatically generates a vendor order number. If the equipment is not in stock, the order goes to Submitted status and a Motili representative will work your order to get the vendor order number.

17. After you place the order, select the Line Items tab to review it. You can click the Truck icon to go directly to the order.

18. Depending on your configuration, the client might review and approve the order before it is processed. See Approve or Reject a Direct Supply Order.

19. When the equipment is ready, review the texts and email notifications.

20. (Optional) If you need to add supporting information, such as Proof of Delivery (POD) or Proof of Return (POR), select the Files tab, upload the file, click Type and choose the type, and click Upload.

21. To view and manage invoices, see Manage DS Invoices.

See Also

- **Become a DS Contractor**

Become a DS Contractor

Motili's Directed Supply (DS) program authorizes contractors to act on a client's behalf to place orders when authorized. Configuration for the program is dependent upon client setup for invoicing, approvals, and other required information.

For more information, see Contractor Ordering. Learn more about the Directed Supply program by contacting your Motili representative, visiting the Motili web site, or calling 1-800-935-5620.

See Also

- **Check Equipment Availability**

Check Equipment Availability

Directed Supply (DS) clients and contractors can check the inventory at the Distribution Center before creating an order.

Check Inventory

You can proactively check to see if equipment and parts are in stock at the Distribution Center before you create an order.
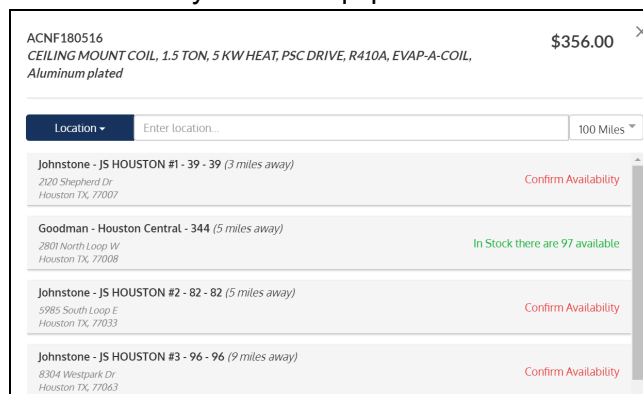
1. Go to the Wrench icon and choose Products.
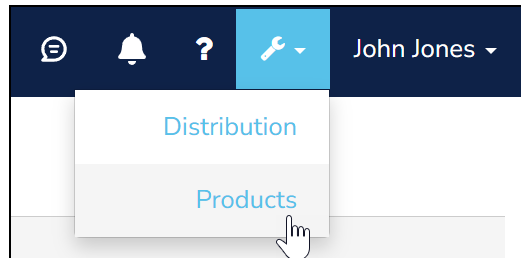
   You can also create a new work order or open an existing one, add equipment, and check the product's availability.

2. You can only filter and search products that are available to that DS client.
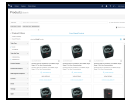
3. In the Filters section, select the appropriate product category and subcategories. If you've already added an item to the truck and chose to ship it, Shipping appears in the Product Selector.

4. Locate the item and click Check Availability. If the item is in stock, the number of available items displays. If *Confirm Availability* appears next to the item, call the branch to verify that the equipment is in stock.

   If an item is not available, click Miles to increase the search radius.

Locate a Distribution Center Near You

1. Go to the Wrench icon and choose Distribution.

2. Click + or - to locate Distribution Centers on the map that are near your job site. Narrow your results by choosing HVAC or Plumbing.
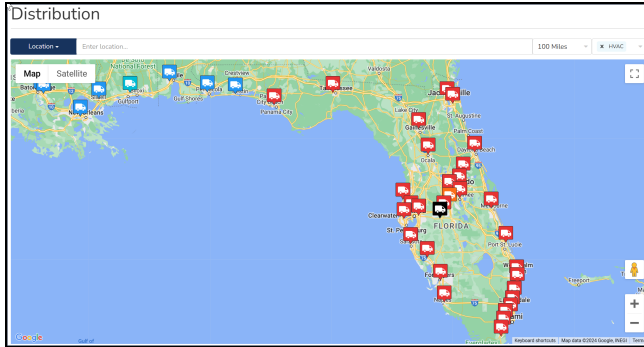
Tip: If you don't see the Gear icon, you are not configured to be a DS contractor. Contact your Motili representative.
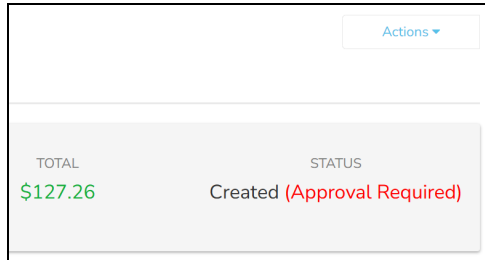
See Also

- **Approve or Reject a DS Order**

Approve or Reject a DS Order

Directed Supply (DS) contractors and clients both have access to the Orders menu, but only a DS client can approve or reject orders. If you don't see the Orders menu, contact your Motili representative. For instructions on how to create a DS order, see Client Ordering or Contractor Ordering.

1. Log in with your client credentials and go to Orders.
2. Locate the order and view the status of the order.

   If you were configured to require order approval for orders placed on your behalf by a contractor and the order has not yet been approved, *Approval Required* appears in the order status.

3. After you approve the order, verify that the order status changes to *Approved* so that the order will move on to fulfillment.

4. If an order has a status of *Approval Required* and a contractor placed this order on your behalf, you can reject the order by clicking Actions and choosing Flag-Denied. The status changes to *Approval Denied.*

Tip: For instructions on how to create a DS order, see Client Ordering or Contractor Ordering.
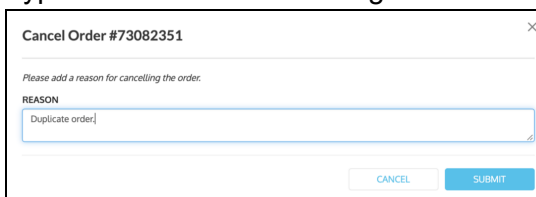
See Also

- **Cancel or Return DS Equipment**

Cancel or Return DS Equipment

As a Directed Supply (DS) contractor or client, you can cancel an order before it is shipped, picked up, or delivered. After you receive the order, you must initiate a return.

Cancel a Directed Supply Order

On the rare occasion when you need to cancel an order, follow these instructions to cancel an order before it is picked up or delivered.

1. Locate the order you want to cancel. The order's status must be *Created*.

2. Go to Actions and choose Cancel.

3. Type the reason for canceling the order and click Submit.
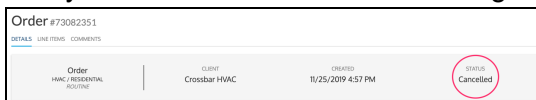
4. Verify that the status of the order changed to *Cancelled*.

You can view, but not edit, a canceled order in the Motili Platform.

Return Equipment or Supplies

Use these guidelines to create a return request *after* equipment or parts were picked up or shipped.

- The line item's status must be *Completed*, which indicates that the equipment was ordered and fulfilled.

- Partial returns are not permitted. If you ordered two of the same item, you must return both items.

- The line item must be for equipment or a part. You cannot select a line item for labor, custom fees, freight, or supplied labor.

1. Locate the order you want to cancel and verify that the status is *Completed*.

   a. In the Orders page, click Advanced Filters.

   b. Click Status and choose *Completed*.

c. Click Save.

> **Tip:** Only Direct Supply contractors have access to the Orders menu. If you don't see the Orders menu, contact your Motili representative.

2. Click Actions and choose Create Return.

3. Complete these fields:

   - (Required) Return Reason - Choose a reason from the drop-down menu.

   - Credit Memo Number - Type the number that ties the credit to what was issued from the vendor. You likely won't have this number at this point.

   - Authorization Number - Type the number supplied by the vendor to approve the return.

   - Return Note - Type more detail here.

4. Select the check box next to the equipment you are returning and click Save. You can select multiple items if they are all being returned for the same reason.

5. Select the Returns tab to verify that the status of the line items being canceled changed to *Returning*.

See Also

- **Manage DS Invoices**

Manage DS Invoices

Both Directed Supply (DS) clients and contractors can view their invoices in the Motili Platform. If you don't see Invoices in the Manage menu, contact your Motili representative.

Contractors: Manage Your Invoices

1. Log in with your contractor credentials, and go to Manage and choose Invoices.
2. Determine which invoices you want to view:
   - **Self Orders** - To view invoices for orders that you ordered for yourself, select the first tab, which is your contracting company name.

   - **Ordered on Behalf** - To view all invoices that you are paying for orders placed on behalf of clients, select the Shared tab. If there are no invoices in the Shared tab, you did not place any orders on behalf of a client.
3. Select an invoice to view more details about the order and the pricing.

Clients: Manage Your Invoices

1. Log in with your client credentials, and go to Manage and choose Invoices.

2. Determine which invoices you want to view:

    -   Select the first tab to see invoices for orders that you placed and were directly invoiced to your company. You can see your pricing on these invoices.

    -   Select the Shared tab to view orders that a contractor placed for you. The contractor will pay the invoice so pricing does not appear on these invoices. If there are no invoices in the Shared tab, the contractor did not place any orders for you.

3. Select an invoice to view more details about the order.

To learn how contractors can order DS equipment on your behalf, see Contractor Ordering.

See Also

-   **Manage Your Account**

Manage Your Account

It's easy to update your account information. Click Manage and choose your company.

- **Locate Your Equipment Order**
- **Create a Preferred Pickup Location**
- **Update Company Details**
- **Add a Technician**
- **Change Job Notifications**
- **Upload W-9 & Proof of Insurance**

Update Company Details

Click Manage, choose Company, and click the Details tab.

Update Your Company Information

1. In the Details section, click Edit and update your company information like address, web site, and phone numbers, then click Save.

2. To update your Tax ID and other financial information, select the Finance tab, click Edit, add details like Tax ID and preferred payment terms, then click Save.

Change Your Coverage Area

1. In the Coverage Area section, click Edit and update details like address, web site, and phone numbers, then click Save.

2. For Service Radius, type the number of miles from your office that you are willing to perform work. The map reflects your location and your new coverage area.

3. Select Restricted to State to work only in the state of your mailing address.

4. Under Counties Included, click the first field and choose the state where you work.

5. Narrow your coverage area by clicking the next field and choosing the specific counties that you serve. If you choose two counties, for example, you'll get dispatches for both counties even if they are outside your radius. This Colorado contractor has a service radius of 60 miles in three counties.

Coverage Area

*Required Fields

SERVICE RADIUS*

| 60 | Miles from 3494 W Hayward Pl, Denver CO 80211-3626, US |

RESTRICTED TO CONTRACTOR'S STATE

Restricted to state

COUNTIES INCLUDED*

Colorado

X Denver - CO   X Adams - CO   X Jefferson - CO

NOTE

Cancel   Save

6. For Notes, enter additional details about your coverage area.

7. Click Save.

Change Your Status

Contact Motili Support at 1-800-935-5620 or email customer.support@motili.com to change your status to *Approved*:

- **Approved** - You have provided all required documentation and you've been approved, so you can receive dispatching notifications, and you can also be manually assigned to a work order.
- **Inactive** - Only Motili Administrators can see this status.
- **Insurance Expired** - Each year you must provide a current valid certificate of liability insurance. See Upload W-9 and Proof of Insurance for instructions.
- **Pending Approval** - You can log in to the Contractor Platform and set up your profile, but you cannot receive dispatching notifications or be manually assigned to a work order.

See Also

- **Add a Technician**

Add a Technician

When you add a new technician, you'll also set up how that person will be notified about jobs through text, email, or both. If a technician is no longer with your company or is out on extended leave, you can stop notifications by deactivating that person. If multiple technicians perform work at a property, you can add additional workers to a work order. An additional worker does not receive work order notifications; only the primary assigned technician is notified.

Click Manage, choose Company, and click the Team tab.

Add a Technician

1. In the Team Members section, click Add.
2. Type the technician's first and last name.
3. Click the Time Zone field and choose the time zone where this technician works.
4. Click Role and choose one:
    - **Contractor Owner** - Add and update company information, and manage technicians, work orders, quotes, and pricing.
    - **Contractor Admin** - View and update company information, and manage technicians, work orders, quotes, and pricing.
    - **Contractor Manager** - Manage work orders and quotes.
    - **Contractor User** - Manage work orders and quotes.
5. Select Restrict to show only work orders, quotes, and orders that are assigned to this technician. If you do not select the Restrict check box, all jobs are visible to this technician. The Restrict check box does not apply to Direct Supply contractors.
6. Click Title and choose the technician's service area.
7. Active is automatically selected to indicate that this technician is a current team member. Only active technicians are able to access and use Motili's web platform and mobile app. To later deactivate a technician, see Deactivate a Technician below.
8. For Contact, type the technician's email. A deactivated technician cannot access the system or receive notifications.
9. Select Dispatch to enable notifications about jobs.
10. Select Back Office to enable notifications from Motili for updated proof of insurance and other required paperwork.
11. Select New User to add a new technician, which triggers an email to reset the password the first time the user logs in. To later disable notifications, see

[Change Job Notifications](#).

12. Click Save.

13. If you want this techician to be able to reassign a work order to another employee, click Edit for the technician you just added and select Reassign Work Orders. This check box is enabled by default for Contractor Owners and Contractor Admins. To learn how to reassign a work order or add an additional worker to the work order, see [Accept and Manage Jobs](#).

Deactivate a Technician

1. Locate the technician and click the kebab menu for that row.

2. Choose Deactivate. The technician is now grayed out in the team list and will no longer receive notifications.

Tip: You can deactivate a Contractor Owner only if there is another tech that is also a Contractor Owner. There must be at least one company owner.

See Also

- **Change Job Notifications**

Change Job Notifications

You can change how a technician gets notified about upcoming and current jobs.

Click Manage, choose Company, and select the Team tab.

1. Locate the technician, click the ellipsis, and choose Edit.
2. To deactivate an employee and no longer send any type of notifications, deselect Active. You can not deactivate a team member with a role of Contractor Owner.
3. Change the technician's name, role, title, time zone, email, or phone number.
4. To change which types of notifications are sent via email or phone, click Notifications and choose None, Dispatching, Back Office, or Dispatching and Back Office to enable notifications.

   Choose Dispatch to enable notifications from Motili about new jobs, and choose Back Office to send notifications for updated proof of insurance and other paperwork.
5. If this technician doesn't have a phone number on record, you can add one by clicking Add, adding the number, and choosing which types of notifications to display.
6. Click Save.

Disable Email Notifications for a Technician

1. Locate the technician, click the ellipsis, and choose Edit.
2. Click Notifications for email and choose None, and then repeat this step for a phone number.

   Tip: Each technician must have an email, even if it is not used for dispatching.
3. Click Notifications for a phone number, and choose None.
4. Click Save.

See Also

- **Upload W-9 & Proof of Insurance**

Upload W-9 & Proof of Insurance

To become an approved contractor, you must provide a signed W-9 form and a certificate of insurance. You can also provide any EPA certifications for your firm and any special payment agreements.

Click Manage, choose Company, and select the Files tab.

1. Under Paperwork, drag and drop a file or click the link to locate a file.
2. Under Paperwork, drag and drop a file or click the link to locate a file and click Open.
3. In the Upload File dialog, click Type and choose one of these document types:
    - EPA Certifications - An EPA certification, or 608 certification, is recognition that a technician is knowledgeable about the laws and regulations surrounding the use and handling of ozone-depleting substances (ODS), such as refrigerants.
    - Flat Rate Payout Agreement - You agree to perform a specific job for an agreed-upon amount.
    - Proof of Insurance - The certificate of insurance must meet the criteria below.
    - W-9 - A signed W-9 must be provided for your company each year.

4. Click Upload.

What Does a Certificate of Insurance Contain?

- Motili is identified as the certificate holder.
- Workers Compensation and employer's liability insurance as required by applicable law.
- Employer's liability limit of no less than $1,000,000.
- General liability insurance with a limit of no less than $1,000,000 each occurrence and $2,000,000 in the aggregate is required.

- Coverage features:

    - Contractual liability, personal injury, broad form property damage, and products/completed operations.

    - A severability of interest or a cross liability clause.

- Automotive liability insurance with a limit of $1,000,000 for bodily injury and property damage combined single limit.

- Your liability for a work order will not exceed the price of the work or $10,000.

- With the exception of Workers Compensation, all policies listed above will identify Motili as an additional insured.

- All policies noted above, where allowed by local law, will provide a waiver of subrogation in favor of Motili.

Tip: If you prefer, you can e-mail all paperwork to customer.support@motili.com.

See Also

- **Use the Mobile App**

Use the Mobile App

Use your cell phone or tablet to go on site and perform jobs and tag equipment.

Go to the Motili Mobile Support Site at m.motili.info to get detailed documentation on how to install and use the Mobile App.

See Also

- Use the Contractor Platform