



CLIENT PROPOSAL • WORK ORDERS + PURCHASE ORDERS

The Work Order Journey

A step-by-step walkthrough of the work order system DataRipple is proposing for Inframark's maintenance and construction work: every order carries its own purchase order from approval to payment, insurance is checked before anyone rolls, and photo proof is required at arrival and completion. Each stage ends with questions for your team, so the build matches **your** workflow, not our guess at it.

PREPARED FOR

Inframark • IMS

PREPARED BY

DataRipple

DATE

August 27, 2026

STATUS

Draft v1 • for your feedback

WHAT THIS WALKTHROUGH COVERS

- ✓ The proposed journey, in 8 stages: a request comes in, gets approved with its purchase order, is dispatched with an insurance check, is worked and photographed in the field, then verified, and the money flows to Vantaca and QuickBooks.
- ✓ Live screenshots from the clickable prototype your team can open in any browser, before the review call.
- ✓ Where your use case shapes the build: every stage has a "your workflow" box with the questions we need answered.
- ✓ What ships first, what is designed in but waits on Inframark inputs, and a one-page intake your team can fill in and send back.

WHAT'S BEING PROPOSED

One work order system on the RippleCore platform, branded for Inframark, with two connected surfaces. The **Office view** is where coordinators raise, approve, dispatch, verify and report. The **Field crew app** is what a technician sees on their phone: one job and one big button at a time, with the paperwork happening by itself. The purchase order is not a separate module - approving a request issues its PO in the same tap, and that PO rides the order through completion, invoice match, your Vantaca ledger, and payment through QuickBooks.

Everything in this document is clickable today. The screenshots are taken directly from the working prototype, seeded with realistic community data - including one vendor blocked by an expired insurance certificate and one job paused over its budget cap, because a system that only shows green tells you nothing.

HOW TO READ THIS DOCUMENT

The next eight pages follow one worked example, order **WO-1041** (a failed splash pad pump before a Saturday event), from request to payment. Each stage ends with a blue **"Your workflow - tell us"** box; page 12 collects the bigger intake questions in one place. Nothing here is final: mark it up, disagree freely, and bring it to the review call. Better yet, click through the live prototype first at rc-inframark-workorders-proto.pages.dev - ten minutes in it makes the feedback conversation twice as fast.

YOUR REQUIREMENTS, MAPPED

WHAT INFRAMARK ASKED FOR (YOUR WORDS)	WHERE IT LIVES IN THIS JOURNEY
"Work order system for Maintenance solutions and Construction projects"	1-8 The whole journey. Maintenance and construction each run their own stage ladder.
"With a po system... Purchase Order system tied to all work orders and AP"	2 6 8 Approval issues the PO; field materials write PO lines; verified work flows to AP.
"...connected to Vantaca (Inframark's current financial software)"	8 Job + cost post to the community's Vantaca ledger. Designed in; waits on API credentials.
"Quick Books (equivalent) with API... on automation for approval any payment"	8 "Paid via QuickBooks" is the final step of every order's money chain.
"COI - Annual auto renewals on automations listing Inframark as the insured"	3 The insurance check runs at every dispatch and can stop a job. November renewals chase themselves.
"Company CAM... pictures upon arrival... completion of work (matching work order to photo requirement)"	5 7 Arrival and completion photos are required, timestamped, and matched to the order.
"Financial Reporting / Budget Management... with GL coding"	8 Every PO line carries a GL code; reports answer "where did the money go" by community.
"CRM... to tie into all work being quoted, proposals submitted, and work completed"	Deliberately not rebuilt here - work orders link into the existing RippleCore CRM module.

1

A request comes in, from anywhere, into one queue

At 7:05 AM the Harvest Green community manager reports the splash pad pump is down, with an event on Saturday. It lands on the coordinator's **Today** screen next to everything else that needs a decision. Requests can arrive five ways, and they all become the same kind of work order:

- **Community manager or amenity staff** - a call, an email, or directly in the system.
- **Resident reports** - through the community portal.
- **Crew flags from the field** - a tech spots a worn swing chain and raises it with a photo.
- **Equipment alerts** - a lift station SCADA alarm raises its own urgent order.
- **Preventive schedules** - quarterly HVAC service raises itself on time, every time.

The screenshot shows the 'Today' screen of the Inframark system. The header includes the Inframark logo and a search bar. The main content area is titled 'Tuesday, August 26' and shows a summary of work orders: 9 Open work orders, 3 Need you today, 2 On site right now, 9 Done this week, and 2 Waiting on money. A red circle with the number 1 highlights the 'New work order' button. Below this, there are three decisions to be made today, each with a 'Fix it', 'Review', or 'Verify' button. The 'Who is where right now' section shows a list of crew members and their current status. The 'This week's money' section shows a summary of financial data, including POs issued, work done, and paid via QuickBooks. The 'Aging watch' section shows a list of work orders that are overdue or need approval.

The coordinator's morning: what needs a decision, who is where, and this week's money - with **New work order (1)** for anything phoned in.

- ✓ **You'll know it worked when** the request shows in "Need you today" with an age timer - nothing waits in an inbox, a voicemail, or someone's memory.

YOUR WORKFLOW • TELL US

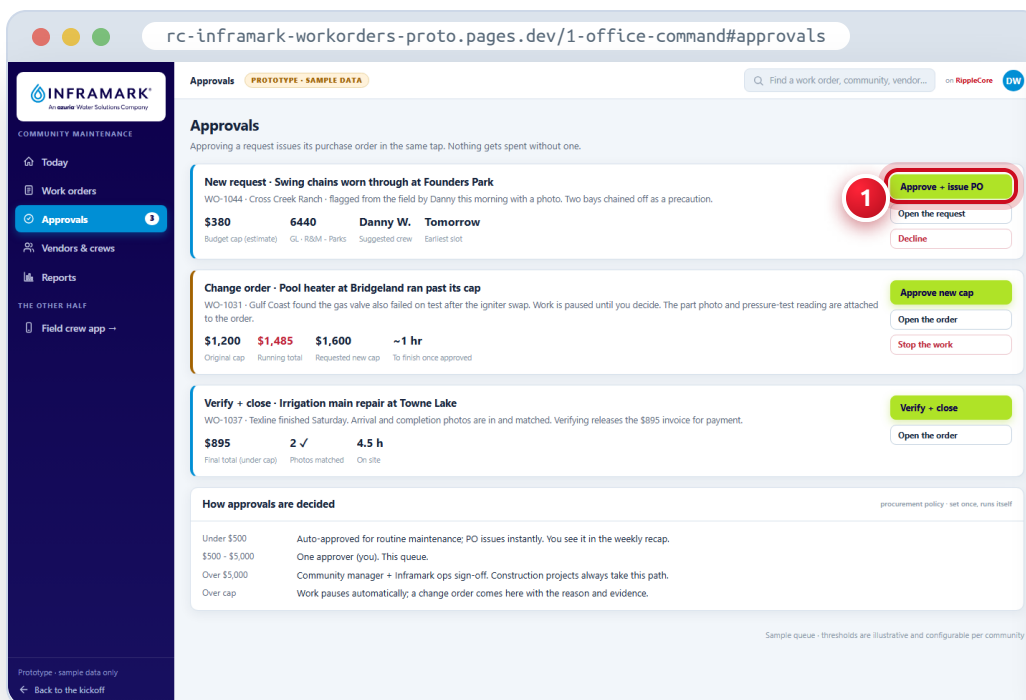
- Where do requests actually come from today, and roughly how many per month per community?
- Should residents see status updates on their reports, or is that between Inframark and the vendor?

2

One tap approves the work, and the purchase order writes itself

The coordinator opens **Approvals**, sees the request with its estimate, GL code, suggested crew and earliest slot, and taps **Approve + issue PO**. That single tap creates the purchase order: a number, a budget cap, and a GL code, tied to this work order for life. There is no such thing as approved work without a PO, and no PO without a work order behind it.

- **Thresholds run themselves** - routine work under a floor you set auto-approves; mid-range comes to this queue; big-ticket and construction work adds a second sign-off.
- **Change orders come back here** - if a job later runs past its cap, work pauses and the difference is approved (or stopped) in this same queue.



The approvals queue. **Approve + issue PO (1)** creates the purchase order in the same tap. Below it: a change order and a verify-and-close, the other two decisions that ever land here.

- ✓ **You'll know it worked when** the order shows its PO number and budget cap, and the money panel starts tracking every dollar against it.

YOUR WORKFLOW • TELL US

- Who approves spend today, and at what dollar amounts does the approver change?
- What must a PO carry for your AP team to accept it: numbering format, GL codes, community entity?

3

Before anyone rolls, the insurance check runs - and it can say no

Dispatch is where certificates of insurance stop being a filing cabinet and become protection. When a job is assigned to an outside vendor, the system checks their COI on file. Current certificate: the job dispatches normally, with the expiry shown on the order. Expired or missing: **the dispatch stops**, a renewal request emails the vendor automatically, and the coordinator sees exactly why the job is stuck, with two ways out.

In the prototype this is seeded on purpose: BlueBonnet Electric's certificate expired August 19, so their monument lighting job at Grand Mission is visibly blocked until a current COI arrives or the work is reassigned to an insured electrician.

DETAIL • THE INSURANCE GATE ON A BLOCKED ORDER

Vendor insurance

COI check runs at every dispatch

BlueBonnet Electric LLC - certificate EXPIRED Aug 19, 2026

Dispatch is stopped until a current COI is uploaded. A renewal request was emailed automatically; Inframark stays listed as additional insured on renewal.

1

Resend renewal request

Reassign the job

✓ **You'll know it worked when** an uninsured vendor simply cannot receive new work - no memo, no spreadsheet check, no exceptions slipping through. **Resend renewal request** (1) chases them; **Reassign the job** moves the work.

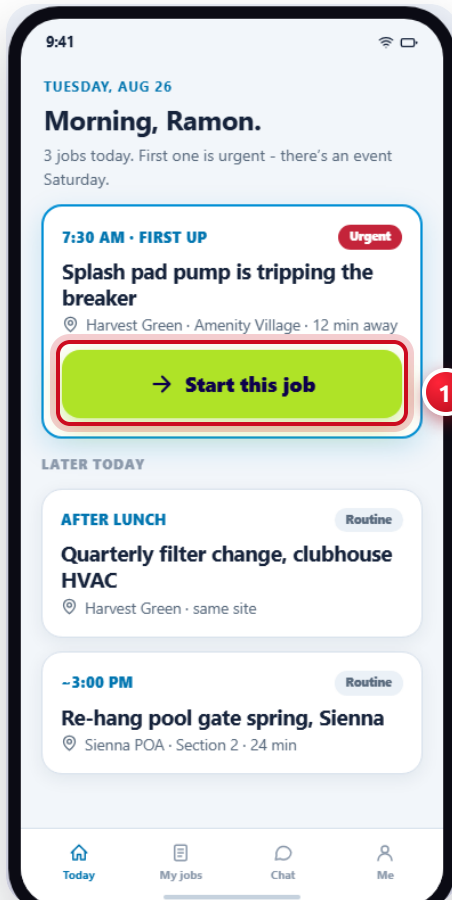
YOUR WORKFLOW • TELL US

- Who tracks vendor COIs today, and what does renewal season actually look like each November?
- Beyond a current COI naming Inframark as additional insured, what else should gate a dispatch: W-9 on file, license, safety cert?
- Should an expired COI also pause a vendor's jobs that are already in progress, or only stop new dispatches?

4

The crew's whole day is three big cards on a phone

Ramon runs Facilities Crew A. He is excellent at pumps and has no interest in software, so his app looks like a delivery driver's: today's jobs in order, the urgent one on top with why it is urgent, and one lime button. No forms, no status menus, no purchase orders. The job card carries the three things crews never have when they need them: what is wrong in plain words, exactly where it is, and the **gate code**.



- **Jobs arrive in route order** - set by the office, reshuffled by drag if the day changes.
- **Start this job** (1) opens the job card: the problem, the place, the gate code, directions, and who to call.
- **Works gloves-on** - 60px buttons, large type, one decision per screen.
- **Works offline** - state syncs when the truck finds bars again.

✓ **You'll know it worked when** a new hire runs their first day without training - if a screen needs explaining, we failed.

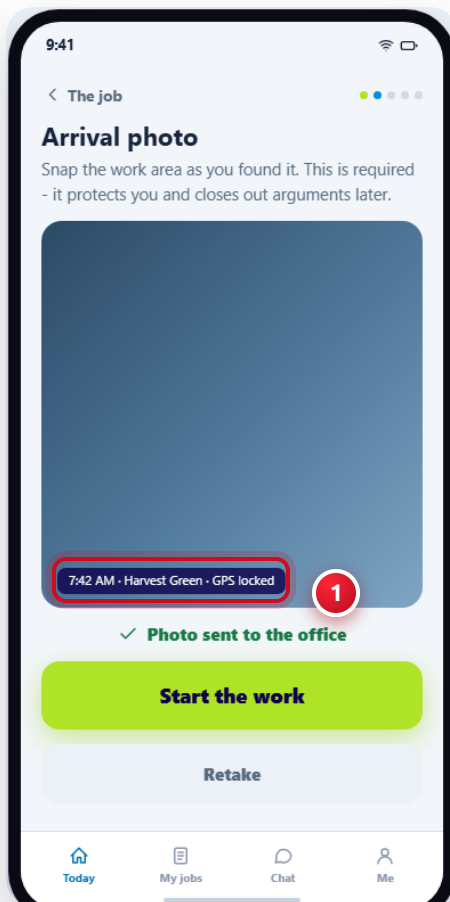
YOUR WORKFLOW · TELL US

- What devices do crews and vendors carry today - company phones, personal phones, tablets?
- Which sites have weak or no signal? (Pump rooms and lift stations usually make the list.)

5

On site, the arrival photo is the timestamp - and it is required

Ramon taps **I'm here** and the app asks for one thing before anything else: a photo of the work area as he found it. This is your photo-on-arrival requirement enforced by design rather than by memo - the flow simply does not continue without it. The photo is stamped with time and location and matched to this work order automatically.



- **The stamp (1)** carries time, community and GPS - the argument-ender when "nobody showed up" meets "we were there at 7:42".
- **The office sees it live** - the coordinator's crew board flips to "On the job, arrival photo ✓" the moment it lands.
- **The order's status moves itself** - no one types "in progress" anywhere.

✓ **You'll know it worked when** every completed order in your audit trail opens with a timestamped photo of the site at arrival, with zero chasing.

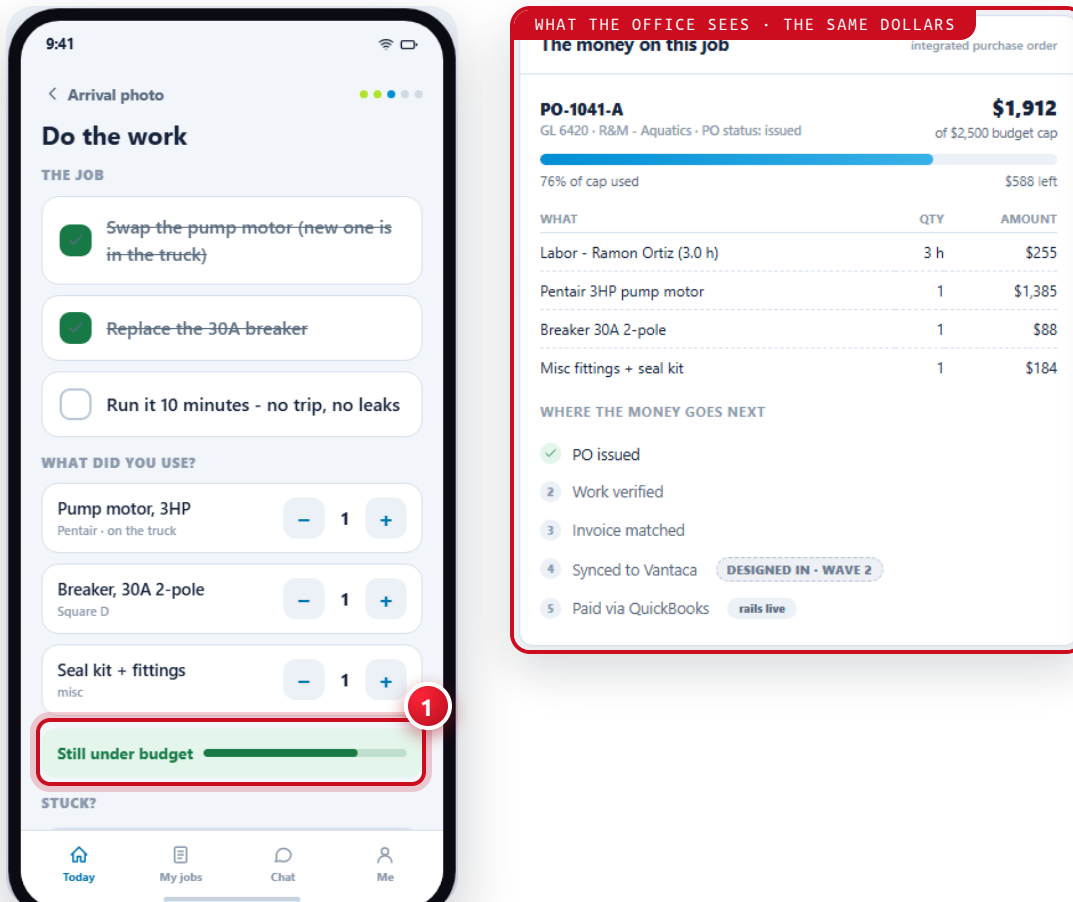
YOUR WORKFLOW · TELL US

- What is your photo policy today, and where do those photos end up?
- Are there job types where an arrival photo does not make sense, or where you want more than one?

6

"What did you use?" is the crew's entire purchasing interface

The work screen is a short checklist written by the office, plus a parts list with plus and minus buttons. Every tap on + writes a line on the purchase order at catalog price - Ramon never sees a PO, a GL code, or a dollar cap. The budget strip translates the cap into human: **Still under budget**, until it is not. Going over does not block his work silently; it pings the office for a change order decision (Stage 2's queue).



Left: Ramon's view - the budget strip (1) is the \$2,500 cap made human. Right: the coordinator's money panel on the same order - PO number, GL code, running total, and the money chain.

✓ **You'll know it worked when** labor and parts land on the PO as they happen, priced, with no handwriting, no end-of-day data entry, and no surprise invoices.

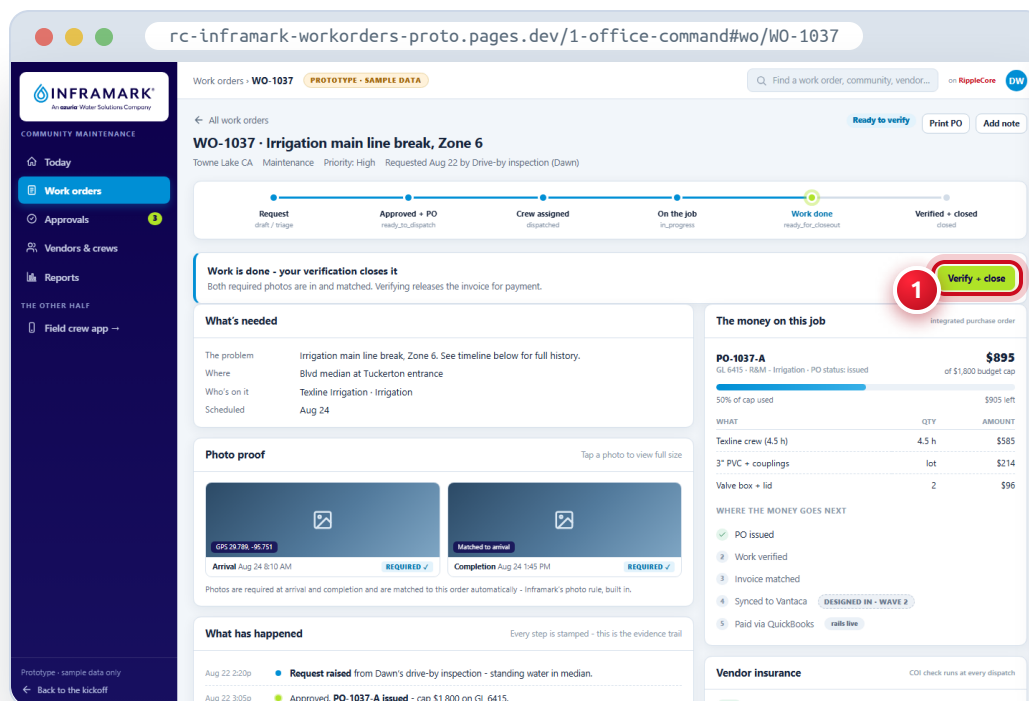
YOUR WORKFLOW • TELL US

- Where should catalog prices come from - your supplier accounts, a house price book, or vendor quotes?
- When a job runs past its cap, who decides, and how fast do they need to?

7

Done means proven: the completion photo, then the office verifies

Finishing works exactly like arriving: the app requires a completion photo of the same work area, matches it to the arrival photo, and moves the order to **Work done**. The coordinator now sees both photos side by side with a one-tap decision: **Verify + close**. Verifying is what releases the invoice for payment - so nothing gets paid for work nobody checked.



A finished irrigation repair at Towne Lake: both required photos are in and matched, and **Verify + close** (1) releases the \$895 invoice for payment.



You'll know it worked when "is it actually done?" stops being a phone call - the photos, the parts, and the hours are already on the order when you open it.

YOUR WORKFLOW • TELL US

- Who should verify completed work: the coordinator, the community manager, or both above a dollar amount?
- Construction jobs add punch list and substantial-completion stages - who owns punch list sign-off today?

8

The money flows home by itself: invoice, Vantaca, QuickBooks

After verification the order finishes its money chain without anyone shepherding it: the vendor invoice is matched against the PO (same number, same lines), the job and cost post to that community's ledger in **Vantaca**, and payment goes out through **QuickBooks**. Every line carried a GL code from approval, so "where did the money go" is a report, not a reconstruction - by community, by trade, ready for the board packet.

DETAIL · A CLOSED ORDER'S MONEY CHAIN, END TO END

The money on this job

integrated purchase order

PO-1030-A
\$485

GL 6410 · R&M - HVAC · PO status: issued
of \$640 budget cap

76% of cap used
\$155 left

WHAT	QTY	AMOUNT
Danny Whitfield (3.5 h)	3.5 h	\$298
Filters + belt set	lot	\$187

WHERE THE MONEY GOES NEXT

1

- ✓ PO issued
- ✓ Work verified
- ✓ Invoice matched
- ✓ Synced to Vantaca **DESIGNED IN - WAVE 2**
- ✓ Paid via QuickBooks

✓ **You'll know it worked when** a closed order reads like this one (1): five checks from PO to payment, and the community's ledger already has the cost.

HONEST NOTE

The Vantaca step is **designed in but not yet connected** (the "Wave 2" tag). Turning it on needs Vantaca API credentials and a community-to-ledger mapping from your side; the QuickBooks rails already run in production on RippleCore.

YOUR WORKFLOW · TELL US

- Which Vantaca entities map to which communities, and who on your side can grant API access?
- What does your AP team need on an invoice for a no-touch match today?

WHAT SHIPS FIRST, AND WHAT WAITS ON WHAT

READY TO BUILD NOW · THE FIRST WAVE

- **The full work order lifecycle**, maintenance and construction, exactly as walked through - the underlying services already exist on the RippleCore platform.
- **The integrated purchase order**: approval issues the PO; caps, GL codes, line items and change orders included.
- **The office view**: Today, Work orders, Approvals, Vendors with live insurance status, and plain-English reports.
- **The field flow**, delivered first as a phone-browser experience so pilot crews are using it in weeks, then graduating into the RippleCore mobile app.
- **Required photo proof** at arrival and completion, matched to the order.

DESIGNED IN · SWITCHED ON BY INFRAMARK INPUTS

- **Vantaca ledger sync** - waits on API credentials and the community-to-entity mapping.
- **The insurance gate's chase automation** - the November auto-renewal season, listing Inframark as the insured, needs your current vendor COI files to seed from.
- **Approval thresholds** - the dollar floors and who signs at each level are set to your answers, per community if needed.

LATER · WORTH DISCUSSING, NOT BLOCKING

- **Vendor self-serve** - vendors accepting jobs and uploading their own COIs, tied to the wider vendor onboarding program.
- **Voice notes from the field** and resident-facing status pages.

WHAT WE NEED FROM INFRAMARK TO START

- ☐ **The pilot communities** - two or three, with their gate codes and site contacts.
- ☐ **Your GL code list** for repairs and capital work, per community entity.
- ☐ **Approval thresholds** - the dollar levels and names from Stage 2's questions.
- ☐ **The vendor roster** for pilot trades, with current COI files.
- ☐ **Vantaca access** - an API credential and the entity mapping, when ready (nothing else waits on this).
- ☐ **Two pilot crews** willing to run their day on the field app and complain loudly.

YOUR WORKFLOW, IN YOUR WORDS

The stage-by-stage questions, collected in one place. Short answers are fine - bullet points, names, and dollar amounts beat polished sentences. Fill this in as a team, scan or photograph it, and send it back, or just bring it to the review call.

Q1 Where does work come from today, and how much of it is there?

Sources (calls, portal, inspections, alarms, schedules) and a rough monthly count per community.

Q2 Who approves spend, and at what dollar thresholds does the approver change?

Names or roles per level, and whether construction follows a different chain.

Q3 Who does the work: internal crews, outside vendors, and in what mix by trade?

Q4 What must a purchase order and invoice carry for your AP team and Vantaca?

Numbering, GL codes, community entities, anything AP rejects today.

Q5 How are vendor insurance certificates tracked and chased today?

Q6 What devices do field crews carry, and where is connectivity weak?

Q7 Which two or three communities should pilot first, and why those?

Q8 What did this walkthrough get wrong about how you actually work?

The most valuable question on this page. Be blunt.

WHERE THIS STANDS

This is a draft built to be marked up. The journey you just read is clickable end to end today, and it was designed from Inframark's own requirements list - but the workflow details belong to your team, and the build will follow your answers, not our assumptions.

THE PATH FROM HERE

- 1 **Explore the prototype** - ten minutes each, before the call. Follow order WO-1041 in the office view, then run Ramon's day in the field app.
- 2 **Mark this document up** - the stage questions and the intake page. Blunt beats polite.
- 3 **The review call** - we walk the journey together, capture your workflow decisions live, and agree the pilot communities and crews.
- 4 **The build starts on the agreed shape** - office view and field flow first, insurance gate and photo rule included, Vantaca switched on the day credentials arrive.

THE PROTOTYPE, ONE CLICK AWAY

The kickoff hub + both surfaces
rc-inframark-workorders-proto.pages.dev →

The demo story · order WO-1041
/1-office-command#wo/WO-1041 →

The office view
/1-office-command →

The field crew app
/2-field-crew-app →

PREPARED BY

DataRipple · the RippleCore platform
dataripple.com · in partnership with Inframark IMS

