Unite Group Supplier Maintenance Portal

Supplier User Guide

Whether you're new to the portal or looking for guidance on a specific task, you'll find step-by-step instructions and explanations to help you complete work confidently.

Version 1.0 | Last updated: July 2026

Start Here.

What do you need help with today?

Select the house icon on any page to return here.

01

Understand your responsibilities

See what you're responsible for when managing work orders in the portal.

02

Received a status update?

Understand what it means and what to do next

03

Find a task guide

Choose a task from the Task Index to follow a step-by-step process

Supplier responsibilities

Before your visit

- ✓ Review work order
- ✓ Upload quote & RAMS (if required)
- ✓ Propose visit date
- ✓ Check access and permit requirements

During your visit

- ✓ Carry out the agreed work
- ✓ Note asset condition
- ✓ Identify any issues or additional work required

After your visit

- ✓ Update the work order
- ✓ Update asset condition
- ✓ Raise remedial work order (if required)
- ✓ Send invoice via Supplier Account Portal

Status Guide

STATUS	APPLIES TO	WHAT THIS MEANS	NEXT STEPS
Sent to supplier	Reactive	You've been assigned a new Reactive Work Order	REVIEW REACTIVE WORK ORDER
Accepted by supplier	Reactive	You've accepted the assignment and are preparing a quote	UPLOAD QUOTE
Declined by supplier	Reactive	You can't carry out the work	Leave details in Chatter
Quote proposed	Reactive | Remedial	You've submitted a quote for approval	Wait for approval
Quote approved	Reactive | Remedial	Your quote has been approved, and we are raising a PO	Wait for PO number
PO raised	Reactive| PPM | Remedial	The PO has been approved and details added to the system	PROPOSE VISIT
Visit proposed	Reactive | PPM | Remedial	You have received the PO and have proposed a visit date including RAMS	Wait for visit approval
Visit accepted	Reactive | PPM | Remedial	Your proposed visit date has been accepted, we'll see you on site!	PREPARE FOR VISIT
	Reactive | PPM | Remedial	You've attended the job and need to update the work order	UPDATE WORK ORDER
Complete	Reactive | PPM | Remedial	Job was attended and Operative/Engineer has completed the job.	Wait for work us to sign the work off
Complete/Cannot complete	PPM	Job was attended and Operative/Engineer identified remedial work required on the PPM asset.	CREATE REMEDIAL WORK ORDER
Closed	Reactive	Means that job was validated by MM/Central Estates and payment has been instructed – work has been signed off.	Raise PO in Supplier Account Portal

Task Index

Use the task index to find the action you need. Some tasks form part of a wider process, so check and complete each part in order.

Access & Navigation

- Log in
- Home Screen
- Finding Work Orders
- Work Order List Views
- Using Chatter

Step-by-Step Guides

- Review a Reactive Work Order
- Prepare for an approved visit
- Upload Quote
- Update work order post-visit
- Add Estimated Cost
- Add asset details
- Upload files
- Create Remedial Work Order
- Propose Visit

Guidance

- Supplier Responsibilities
- Status Guide
- Supplier Zone

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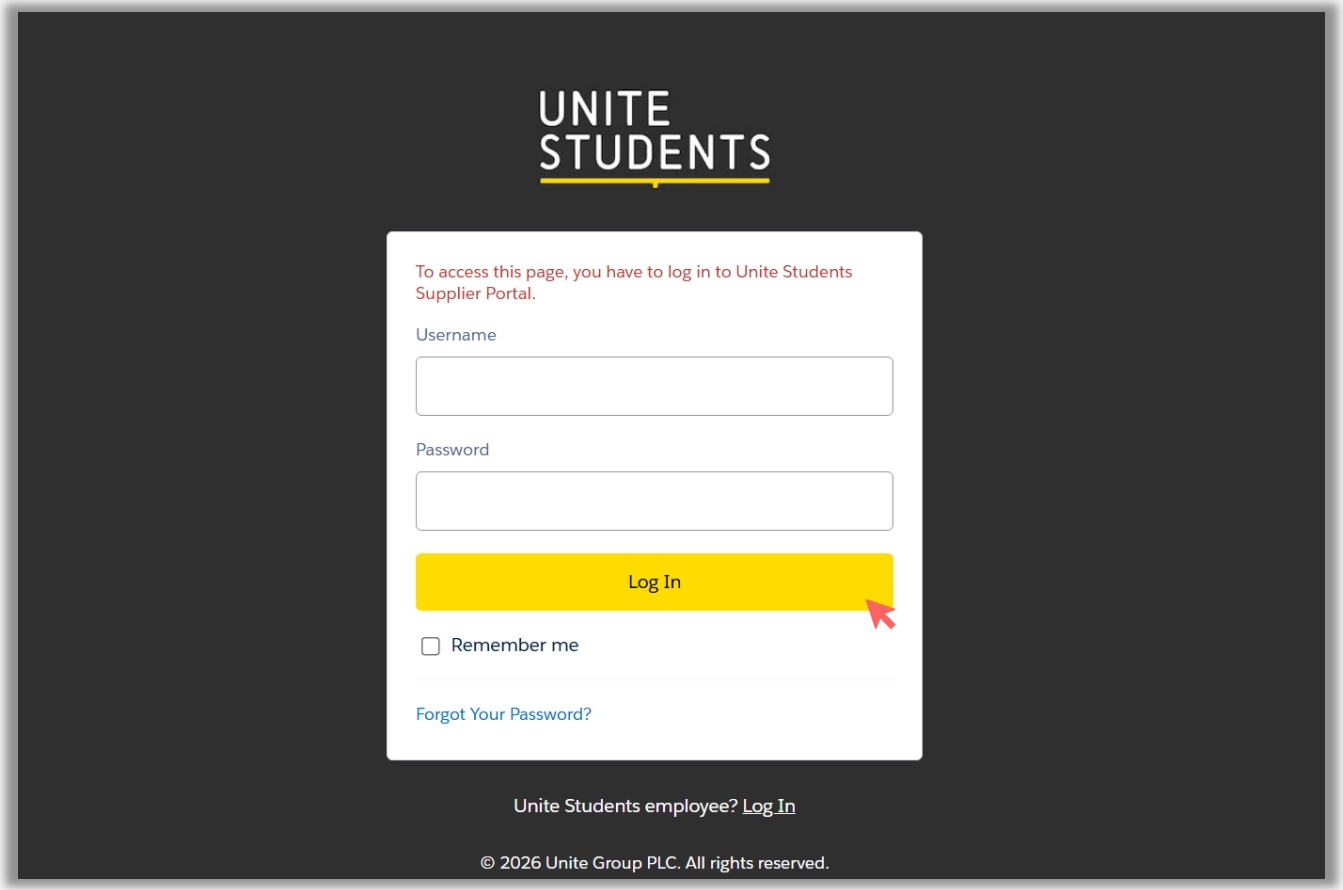
Access & Navigation

Get started and find your way around the portal.

Logging in

01 **Open** the Unite Group Supplier Maintenance Portal in your preferred browser.

02 Enter your **Username** and **Password** then click **Log In** to access your account.



Top Tips

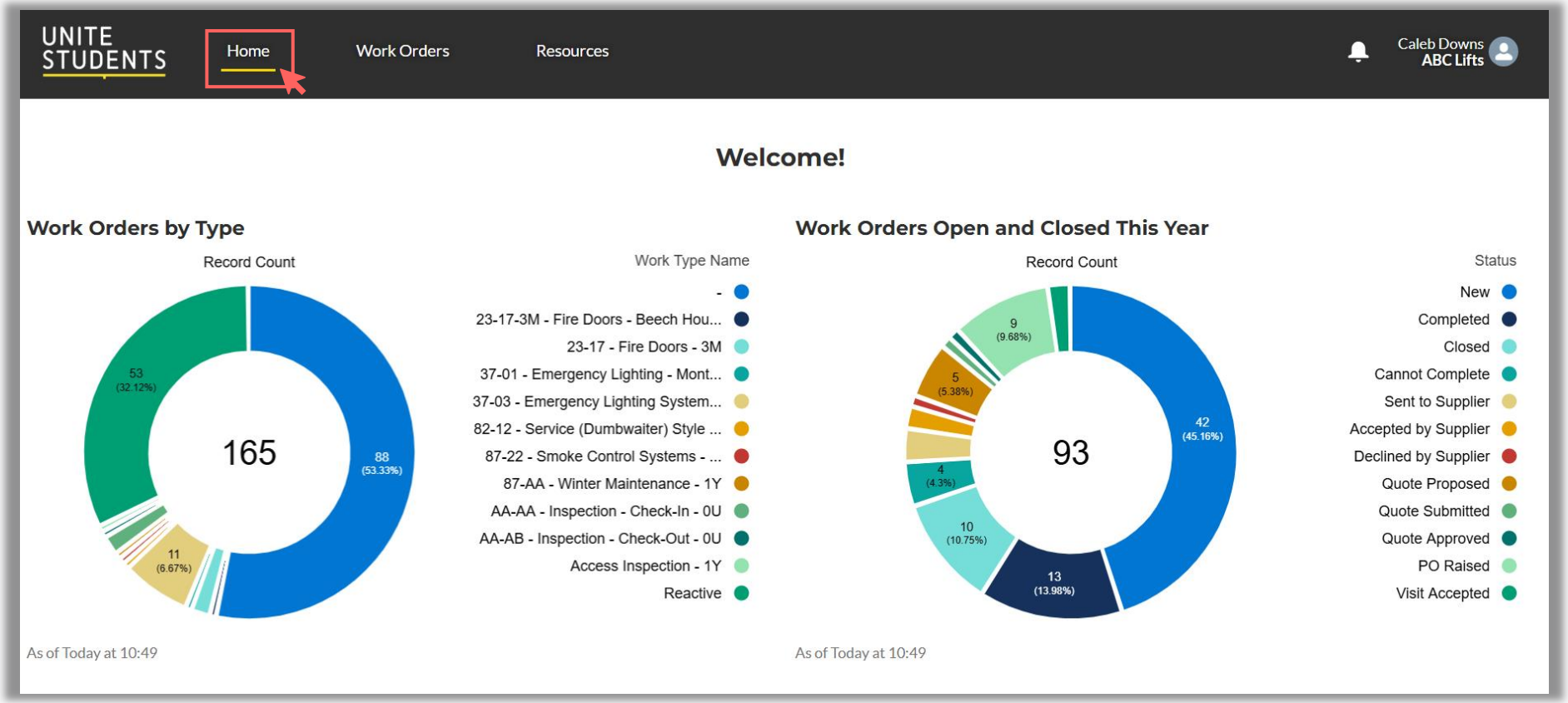
- Your username is usually your email address
- If you're having trouble logging in, click on *Forgot your Password?* and follow the steps.
- If you're still experiencing issues signing in, please reach out to your **main contact** at Unite Group.

Using the Home Screen

When you log in, you'll see the Home screen, which gives you a quick snapshot of your work orders.

Use this page to:

- ✓ Get a visual summary of work orders by type and status
- ✓ Select a chart segment to explore related records



Good to know

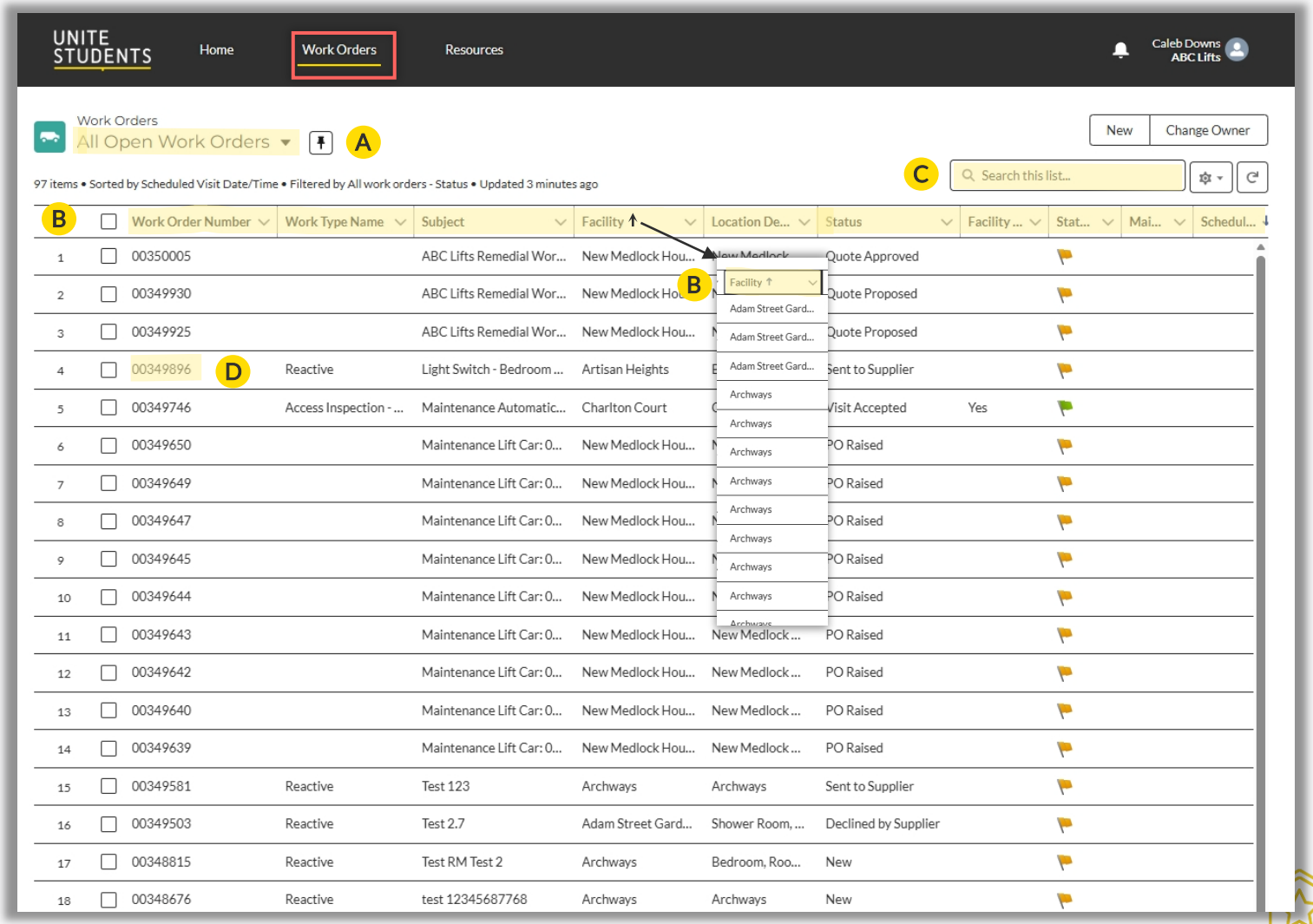
Available widgets may change as new features are added

Finding & Managing Work Orders

The *Work Orders* tab gives you a high-level list view of your work orders.

KEY FEATURES:

- **A** Switch **list view** (defaults to *All Open Work Orders*)
- **B** **Sort** columns **alphabetically** or **numerically**.
- **C** **Search** for a specific Work Order by number, subject, or other details.
- **D** Select a Work Order number to view the details.



Top Tips

- Sorting by due date, status, facility or location are useful ways to prioritise workload.
- Drag column borders to reduce width and fit more columns on the page.
- Scroll to the bottom of the page to view additional columns on the right

Work Order List Views

01

List View Drop-down

In the *Work Orders* tab, click on the drop-down arrow

02

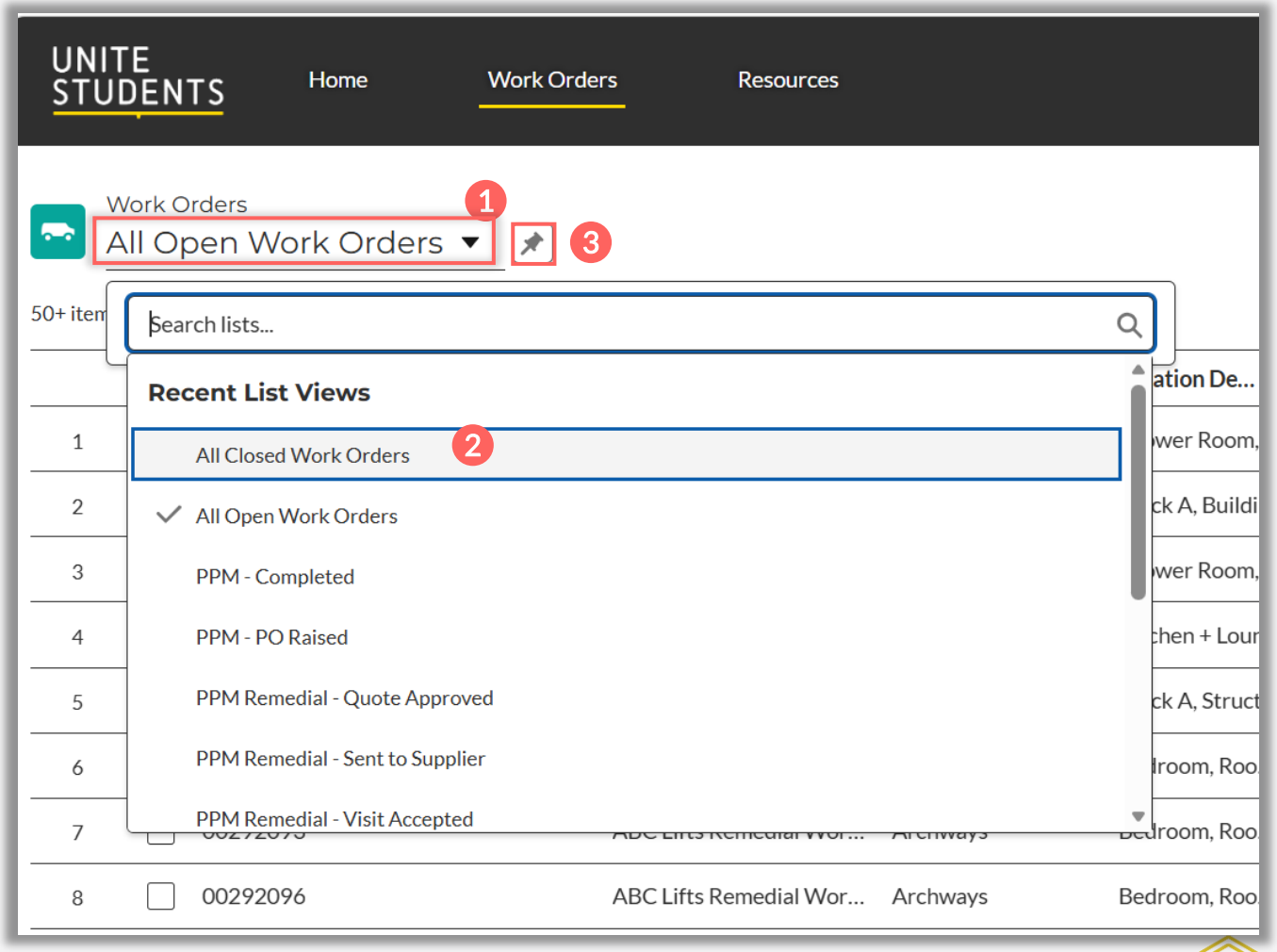
Choose your view

Chose the list that matches the work you want to do

03

Pin your favourites

Use the pin button to have your most frequently used list views appear at the top of the drop-down list.



Top Tip

Refer to the *Work Order Status Guide* to check what each status means

Status Guide →

Using Chatter

01

Review updates

See all activity and filter by activity type.

02

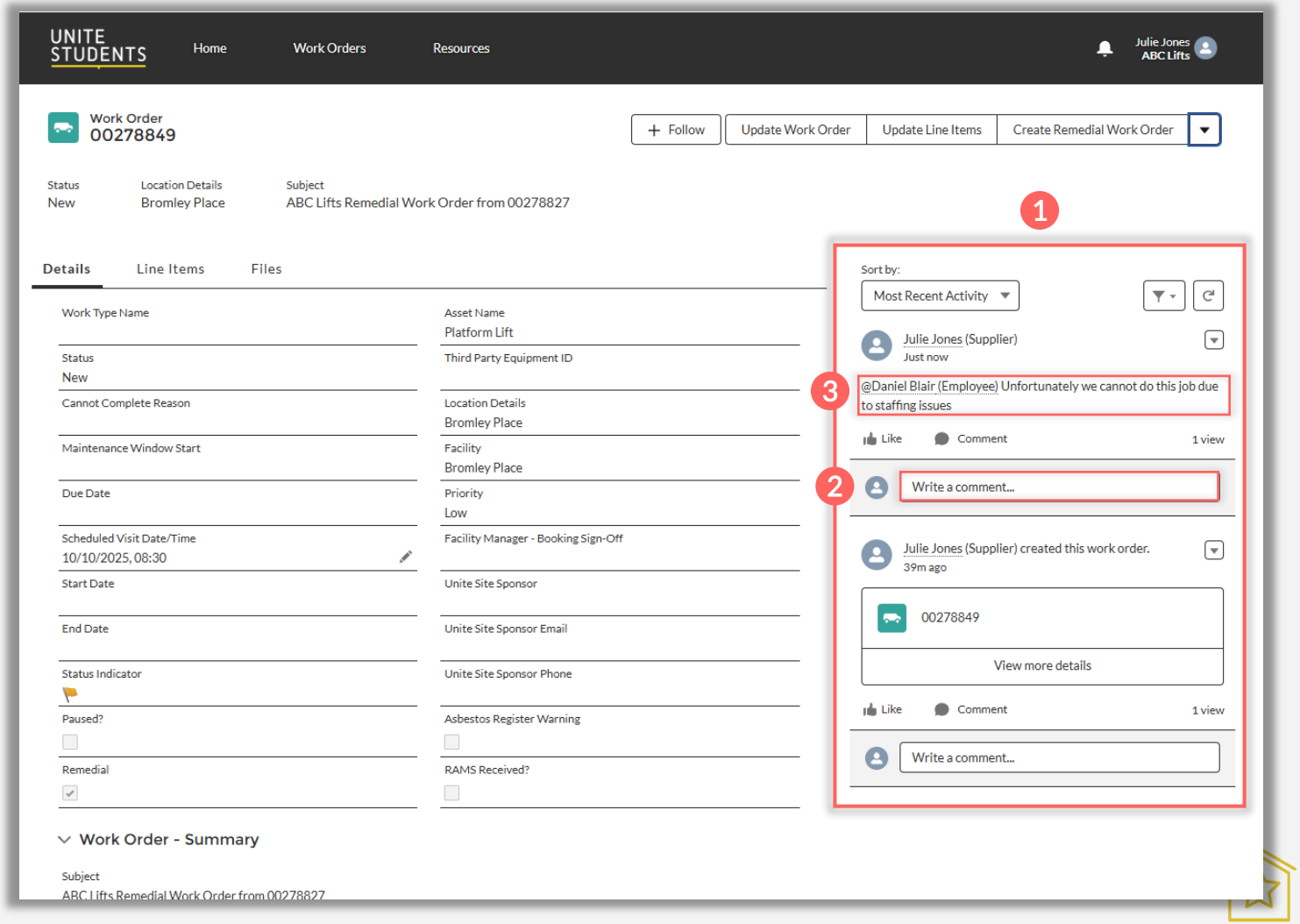
Add a comment

Use the comment box to ask questions or share updates.

03

Tag a colleague

Type @name to notify someone and include them in the conversation. You can only tag someone who has already engaged with the work order.



Top Tip

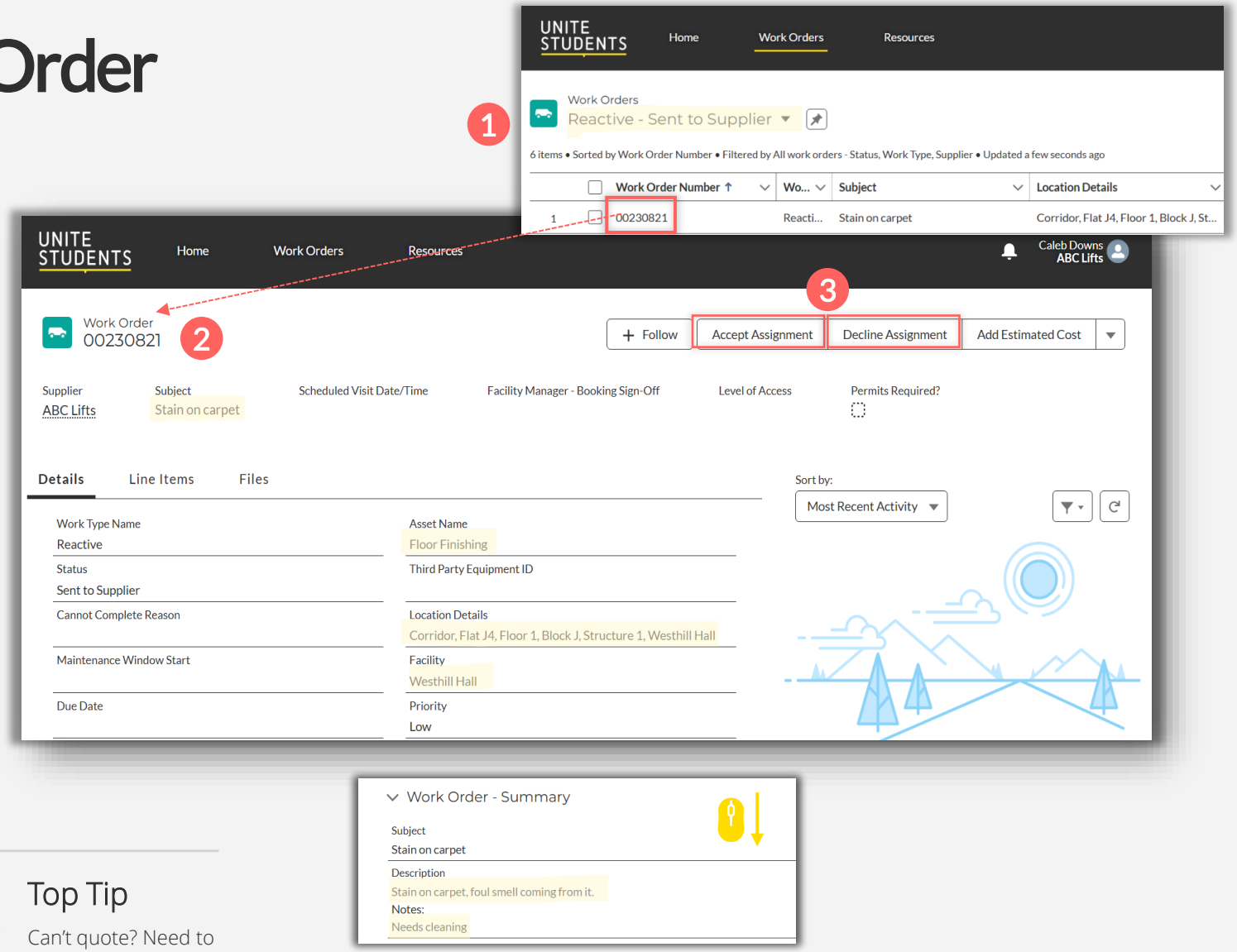
Keep all Work Order communication in Chatter so everyone has the latest information.

02

Before your visit

Everything you need to do in the portal before attending a job.

Review a Reactive Work Order



01 Open the Work Order

Open the *Reactive – Sent to Supplier* list view and select the Work Order.

02 Review information

Check the key information before accepting.

- Asset
- Location

03

- Work summary

Accept or Decline

Select *Accept Assignment* or *Decline Assignment.*

Check

Status changes to *Accepted by Supplier* or *Declined by Supplier*

Next Step

Add your quote and estimated cost

Top Tip

Can't quote? Need to discuss costs? Use *Chatter* to discuss with the team.

SUBMIT A QUOTE| PART 1 OF 2

Upload Quote Files

01 **Open the Files tab**

Navigate to the *Files* tab within the relevant Work Order.

02 **Add Files**

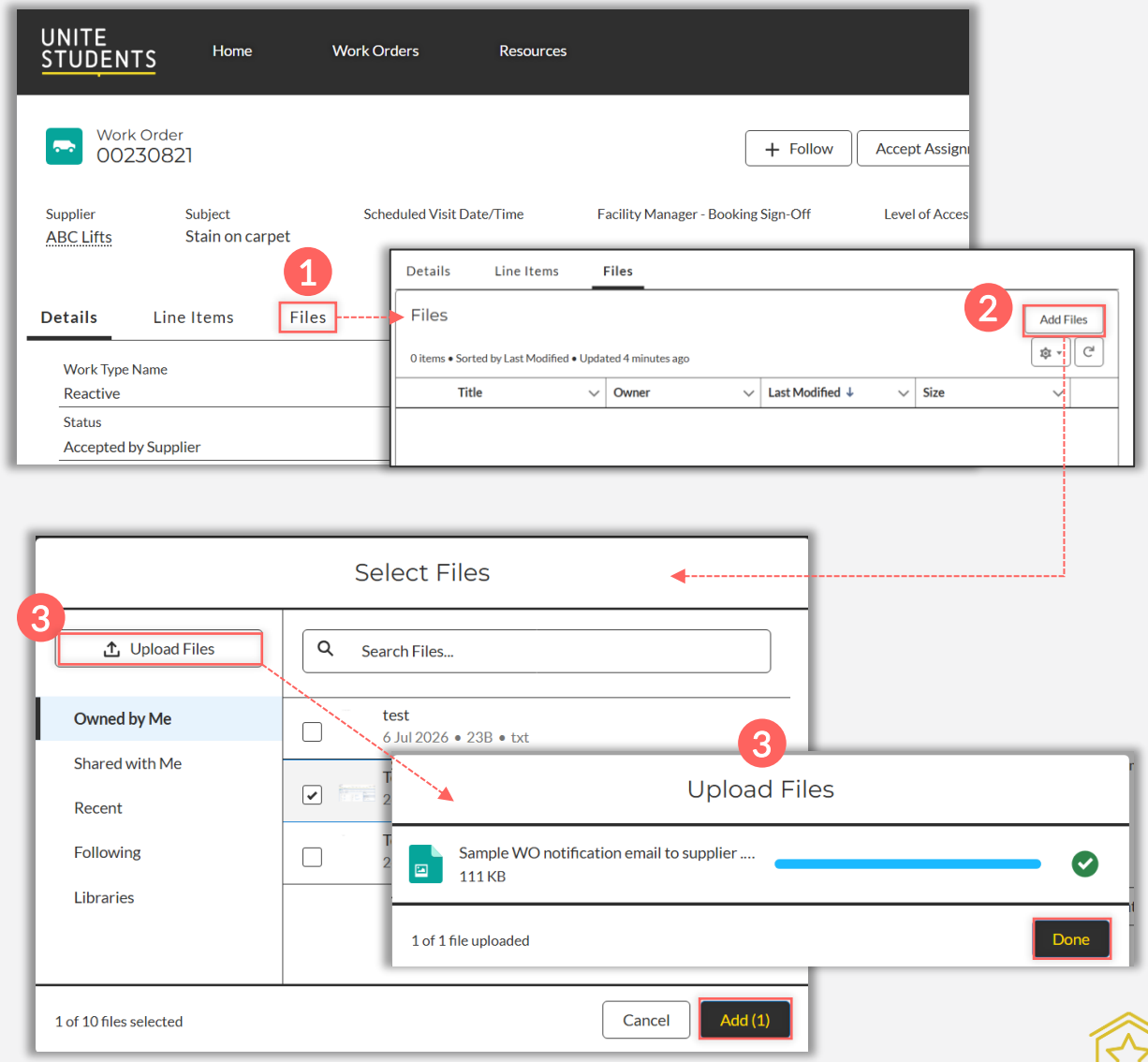
Select *Add* Files then *Upload Files*

03 **Upload your document**

Use a file name that identifies the document type, supplier and work order number.

Example: Quote – ABC Lifts – WO 00230821

Wait for your file to upload and click *Done*.



Check

Your quotation appears in the *Files* tab.

Next Step

Add the estimated cost

SUBMIT A QUOTE| PART 2 OF 2

Add estimated cost

01 **Select *Add Estimated Cost***

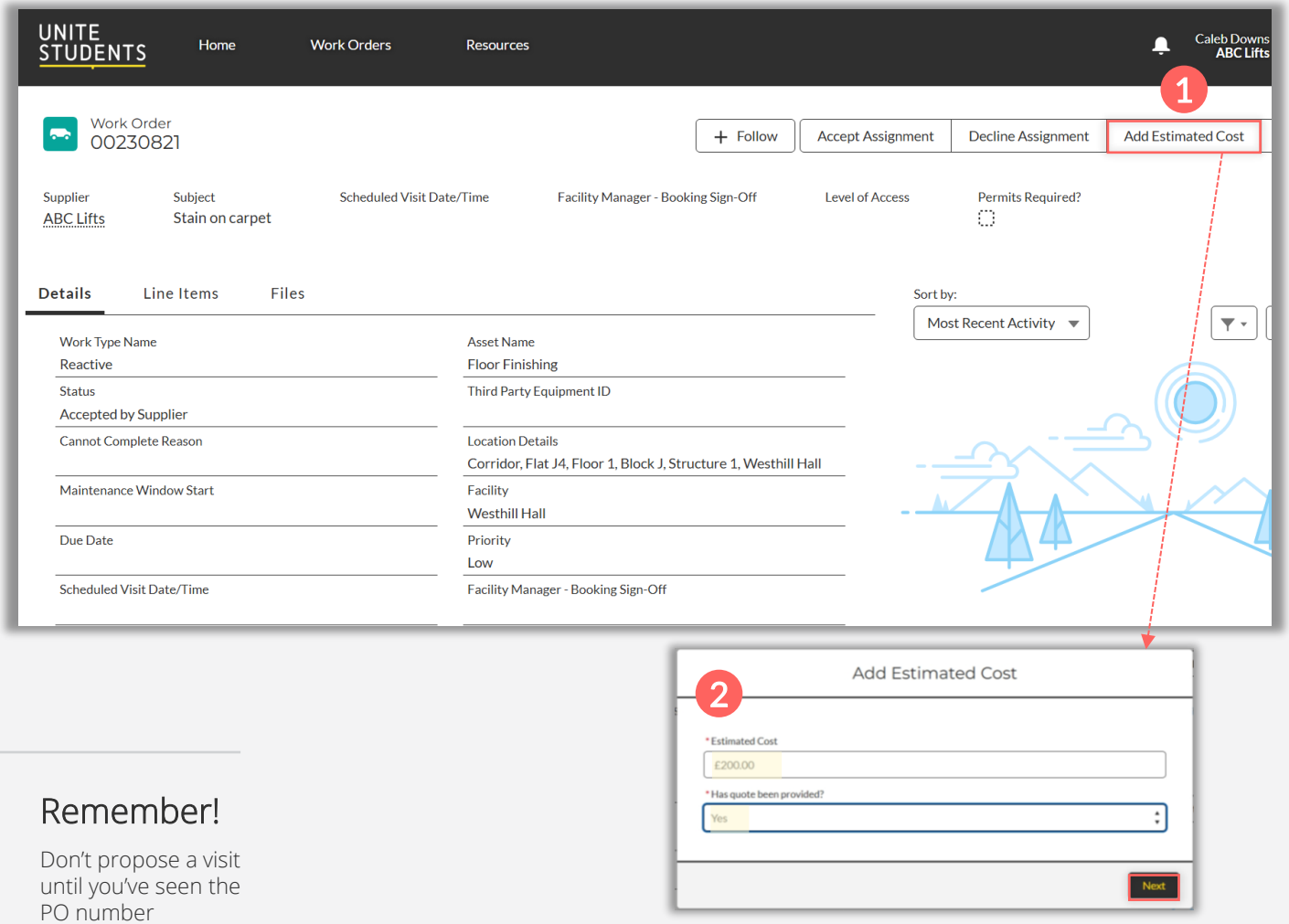
You'll find this button within the Work Order details tab.

02 **Add details**

Add estimated cost and confirm you've uploaded the quote.

03 **Wait for approval**

We will review the quote and add questions to *Chatter* if required before approval.



Check

Status changes to *Quote Submitted* then *Quote Approved* once it's been reviewed.

Next Step

Wait for status to change to *PO Raised*

Remember!

Don't propose a visit until you've seen the PO number

PROPOSE A VISIT | PART 1 OF 2

Add RAMS documentation

01 Open the Files tab

Navigate to the *Files* tab within the relevant Work Order.

02 Click Add Files

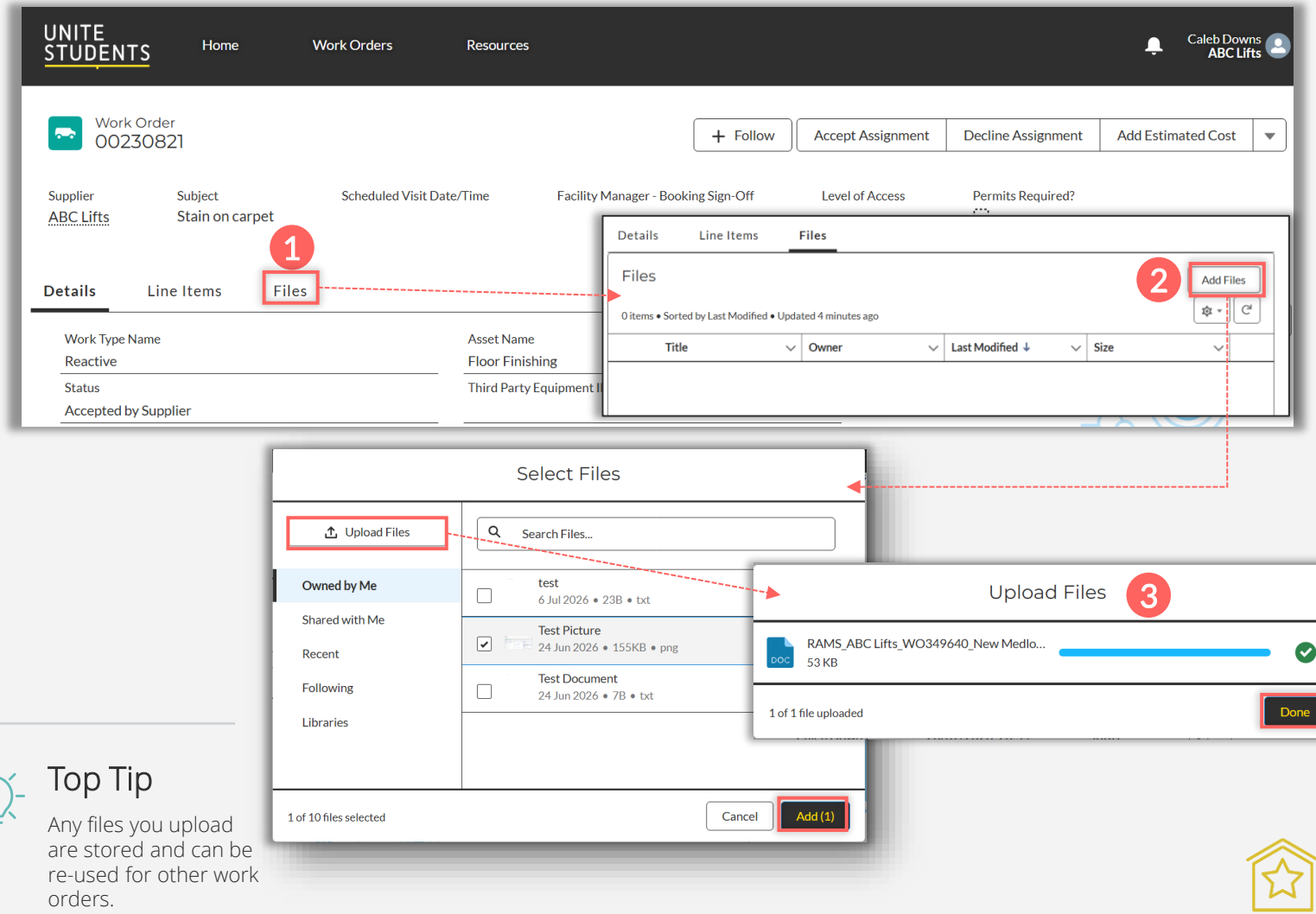
Then click Upload Files to locate the file you want to upload.

03 Upload your RAMS document

Use a file name that identifies the document type, supplier and work order number.

Example: RAMS – ABC Plumbing – WO 123456

Wait for your file to upload and click *Done*.



Check

Your RAMS document appears in the *Files* tab.

Next Step

Propose a time and date for your visit.

Top Tip

Any files you upload are stored and can be re-used for other work orders.

PROPOSE A VISIT | PART 2 OF 2

Suggest visit date & time

01 **Check for PO number**

When the status changes to *PO Raised*, the number should appear in the Work Order *Details* tab.

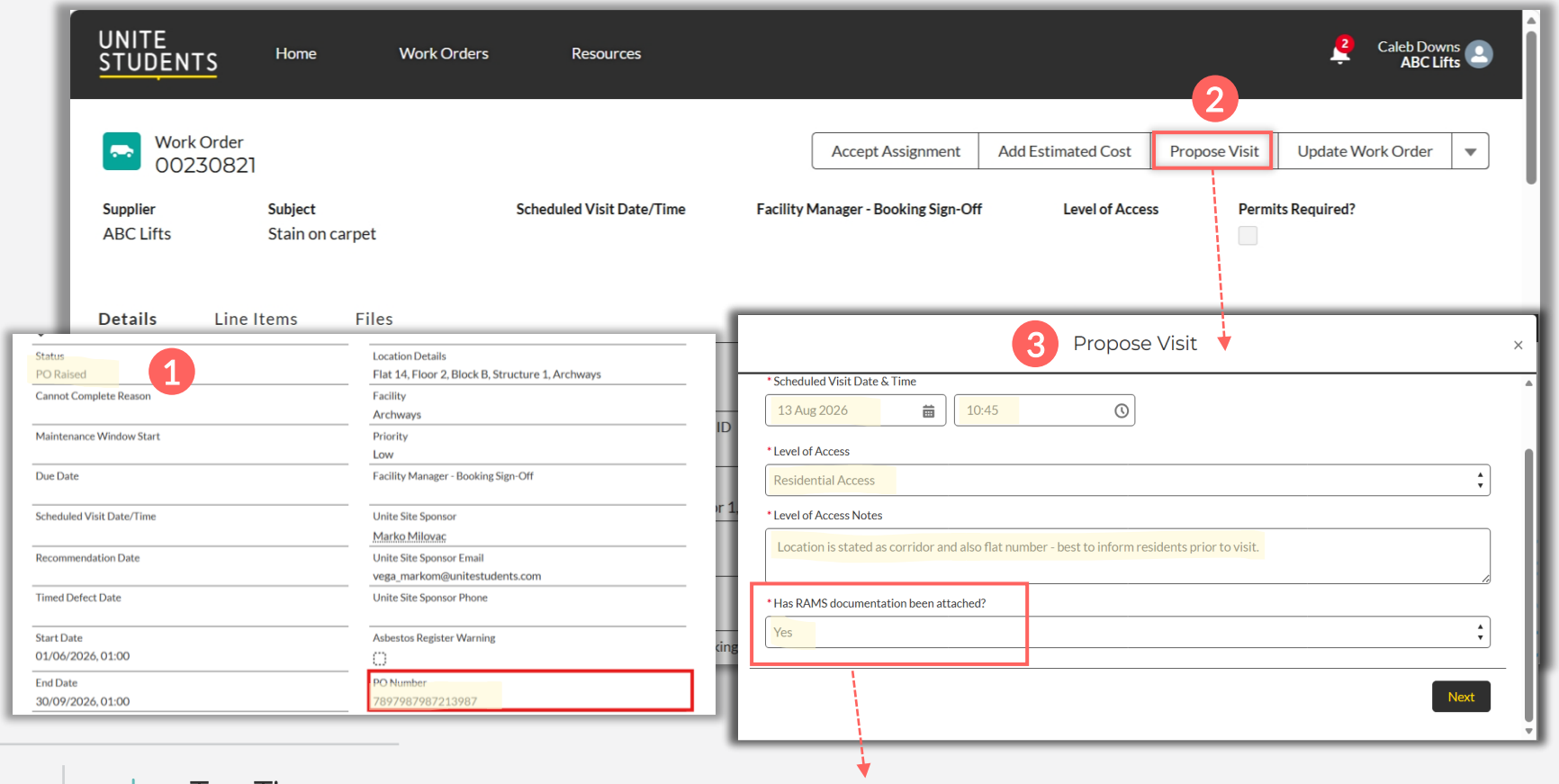
02 **Propose visit date & time**

Click on the *Propose Visit* button, then select the date and time you wish to attend.

This must take place **before the due date.**

03 **Add access details**

Select whether you'll be working in a Communal or Residential Area (check asset details) and add access notes.



Check

Status has changed to *Visit Proposed*

Next Step

Wait for visit to be approved.

Top Tip

If you need to change the visit date or time, use *Chatter* to notify the property team.

⚠ **Important:** The **'Not Required'** option is not currently functioning as intended. Where RAMS are not required, please select **'No'** to proceed.

PREPARE FOR A VISIT | PART 1 OF 2

Check for visit sign-off

01

Maintenance Manager Sign-Off*

Check whether your proposed date and time has been accepted.

02

Update Chatter

Review *Chatter* for any additional detail and add a comment to let the team know you've seen the update and the details of who will be attending on the day.

03

Add the visit to your diary

We've got it in ours ☺

Check

Status indicator flag is green

RAMS have been approved

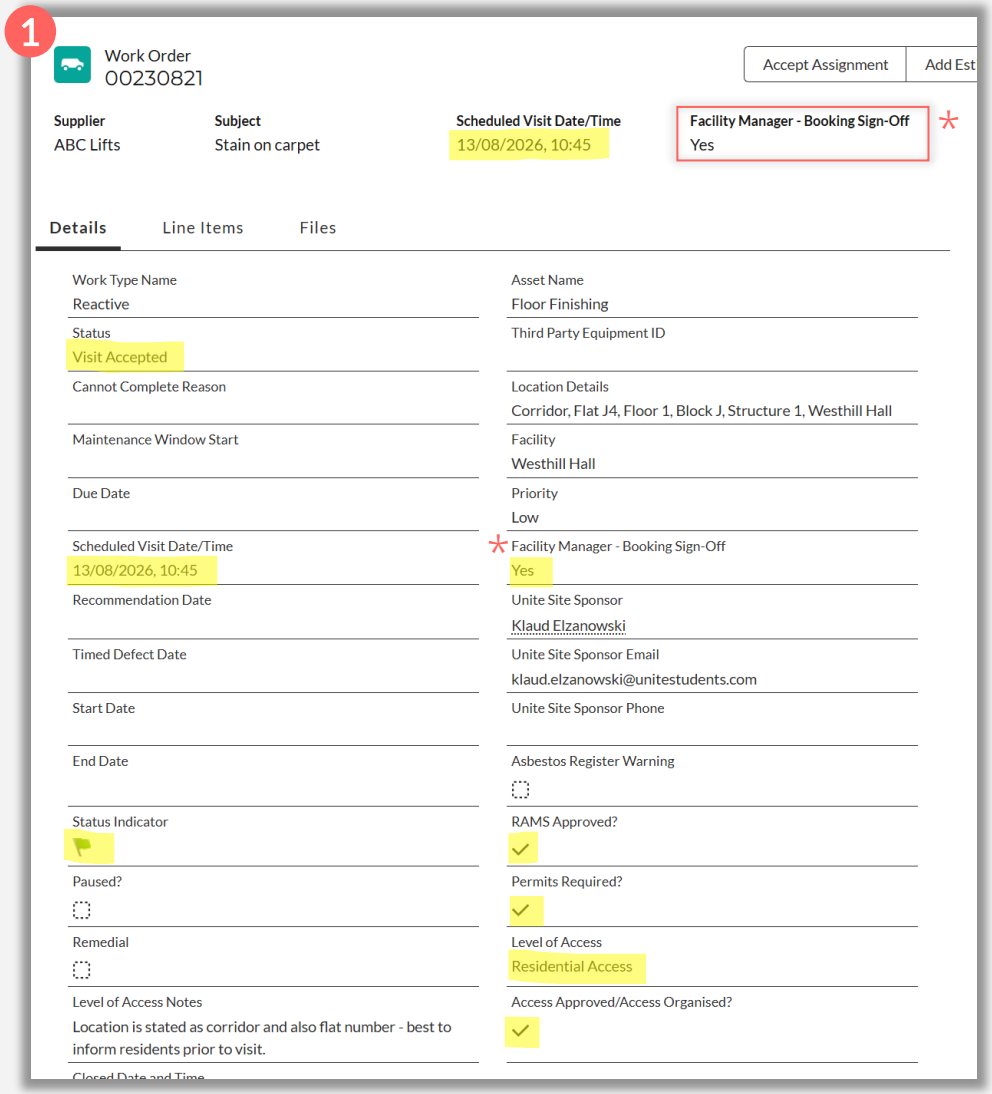
Next Step

Review permit and location details

Need to make a change?

Go back a step and propose the visit again – the status will change back to *Visit Proposed*

* Note that from 06/08/26 Facilities Managers will be referred to as Maintenance Managers.



PREPARE FOR A VISIT | PART 2 OF 2

Review permit & location

01

Check for permits

Scroll to the bottom of the Work Order *Details tab* to find specific **permit requirements** for the visit.

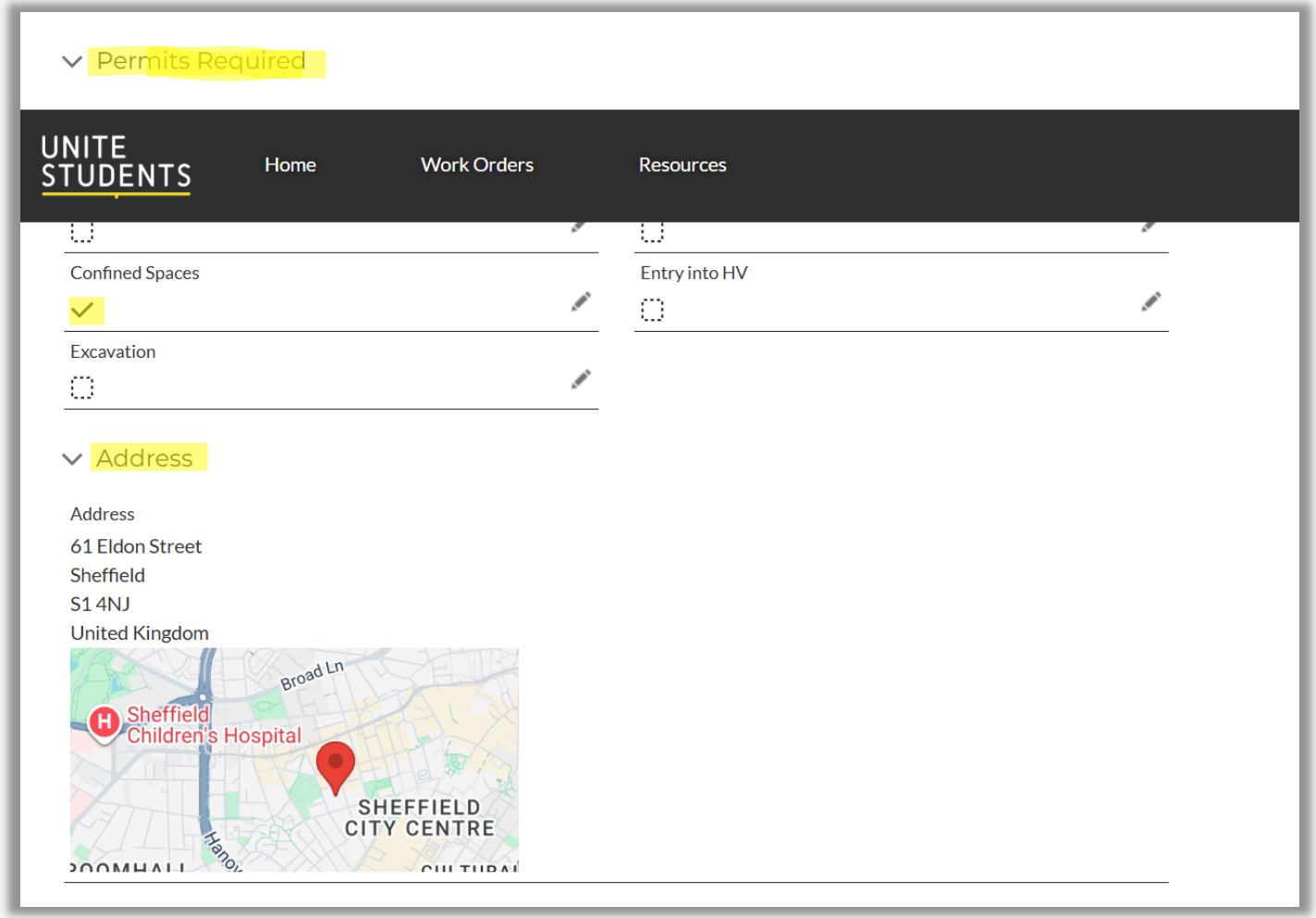
02

Check address

Make sure you're clear where to go and where to park. Use *Chatter* if you have any questions.

Next Step

Carry out maintenance work



03

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After your visit

Everything you need to do in the portal after attending a job.

UPDATE WORK ORDER | PART 1 OF 3

Update work order post visit

01

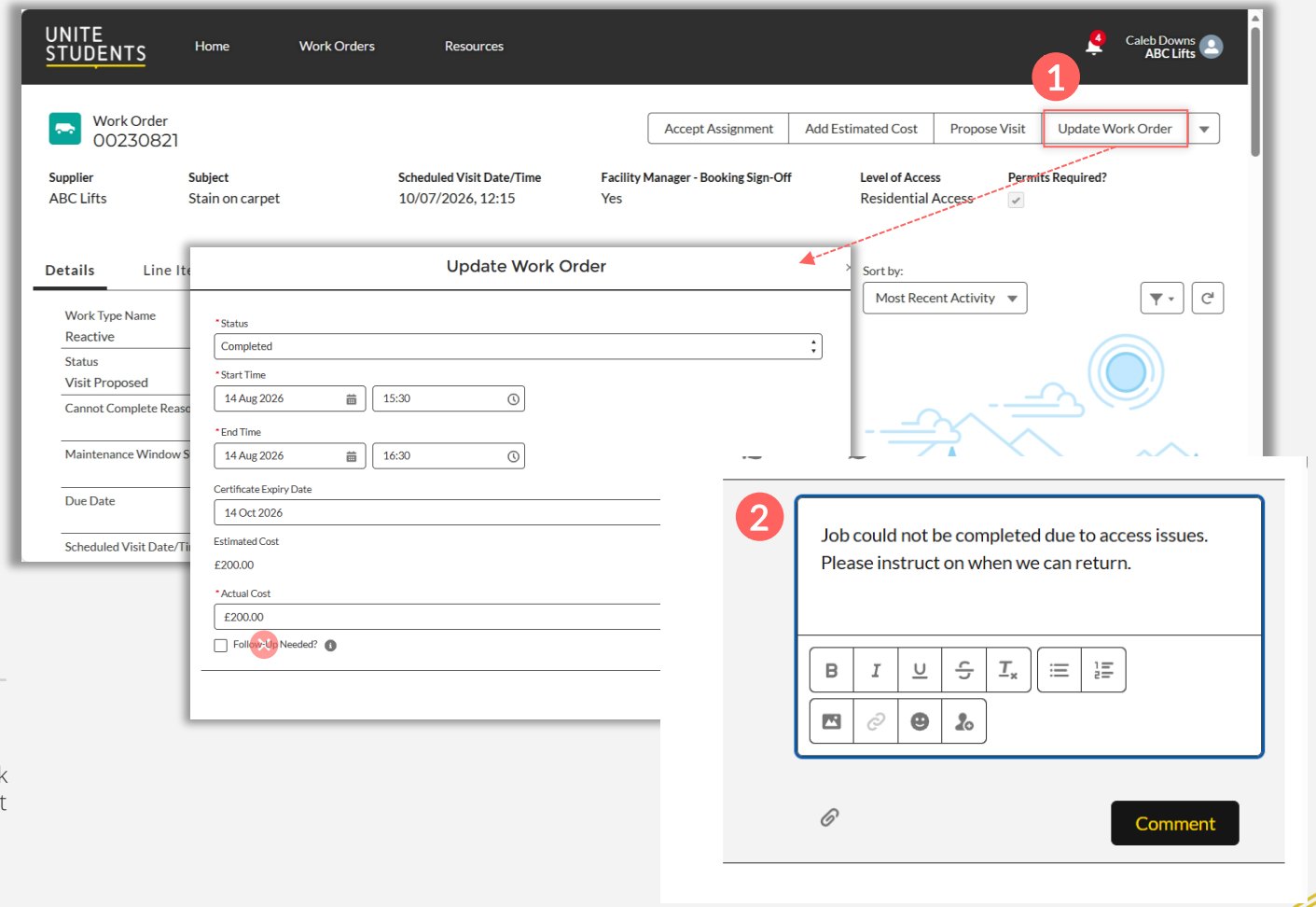
Update Work Order

Click on the *Update Work Order* button, then add completion status, actual cost & timings and certificate expiry date where relevant.

02

Cannot Complete?

If you are unable to complete a job due to access restrictions or any other issue, **do not** update the Work Order. Instead, add a note in the Chatter explaining that the job could not be completed and provide the reason.



If follow-up work is required don't tick the *Follow-Up Needed* box. Follow the steps to create a separate remedial work order instead.

Create Remedial Work Order →

Next Step

Add Asset Details

Top Tip

If you discover general maintenance work that's required during your visit, that's not related to the work order, reach out to your main contact and they will create a new reactive work order.

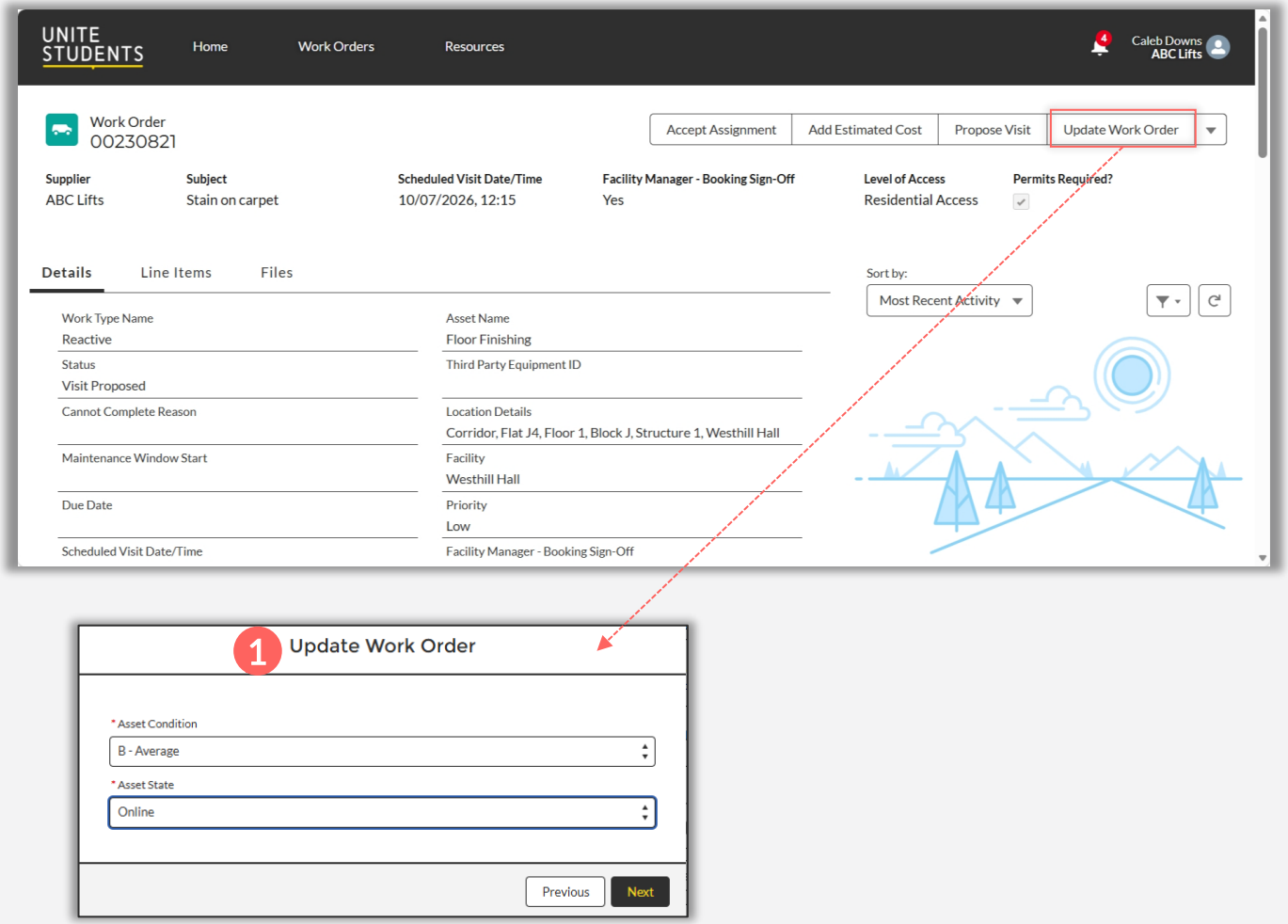
UPDATE WORK ORDER| PART 2 OF 3

Add Asset Details

01 | Update Asset Condition and Status

Use table for reference

Asset Condition	Description
Good	Only planned maintenance required / asset is on spec/ no immediate work needed
Average	Minor maintenance required plus planned maintenance/ off-brand or not to spec/ lifecycle wear & tear
Poor	Significant maintenance required/ major wear & tear
Very Poor	Significant renewal and/or rehabilitation required / Health & Safety hazard
Beyond Repair	Physically unsound and/or beyond rehabilitation / unsafe
Missing	Unable to locate



Next Step

Upload job completion documents

UPDATE WORK ORDER| PART 3 OF 3

Upload job completion documents

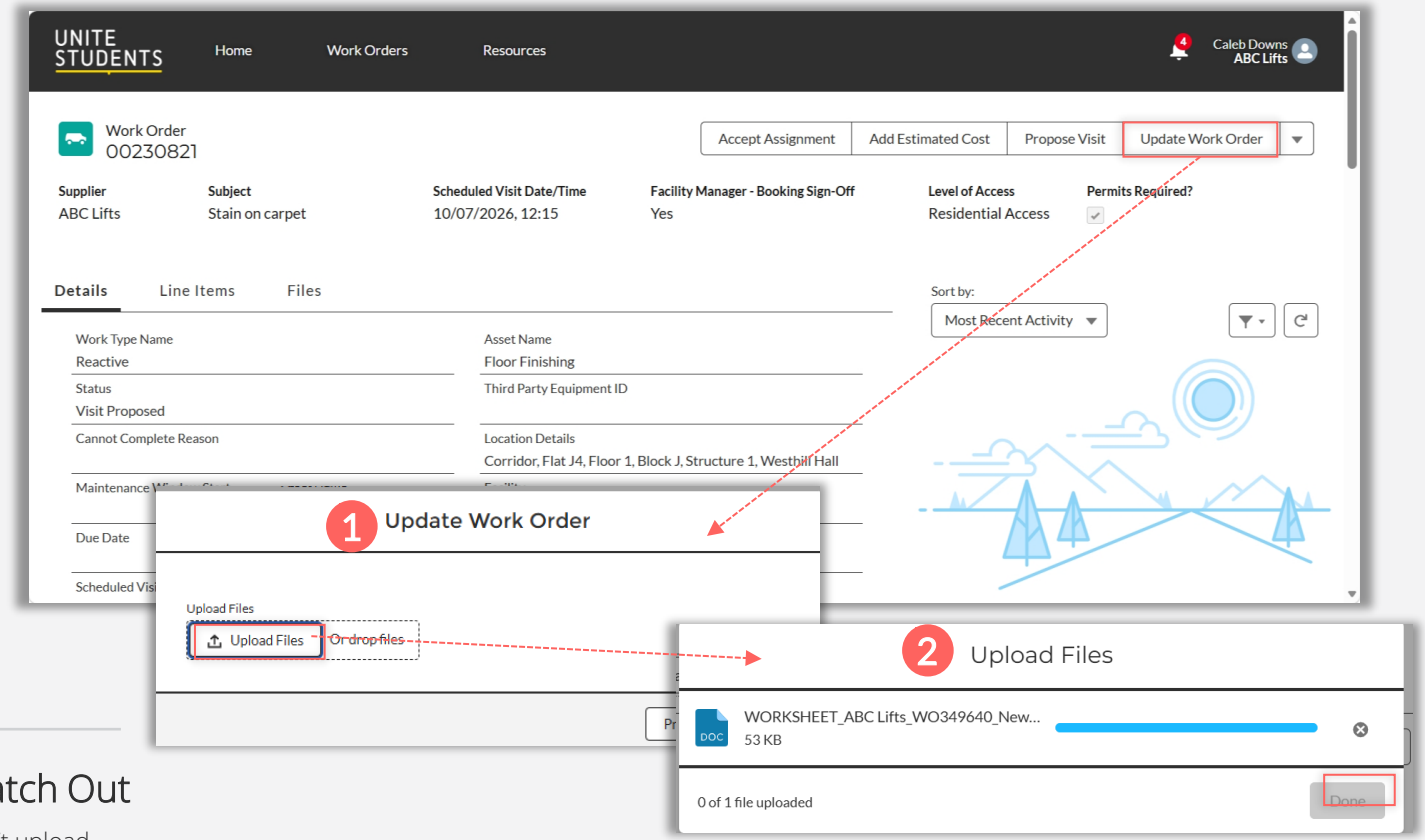
01 **Upload files**

Such as worksheets or job sheets, certificates etc.

02 **Name your file clearly**

Use a file name that identifies the document type, supplier and work order number.

Wait for your file to upload and click *Done*.



Check

Status has changed to *Complete* or *Cannot Complete*

Next Step

Wait for the status to change to *Closed*.

Then submit invoice on Supplier Account Portal

Watch Out

Don't upload invoice documents

Create Remedial Work Order

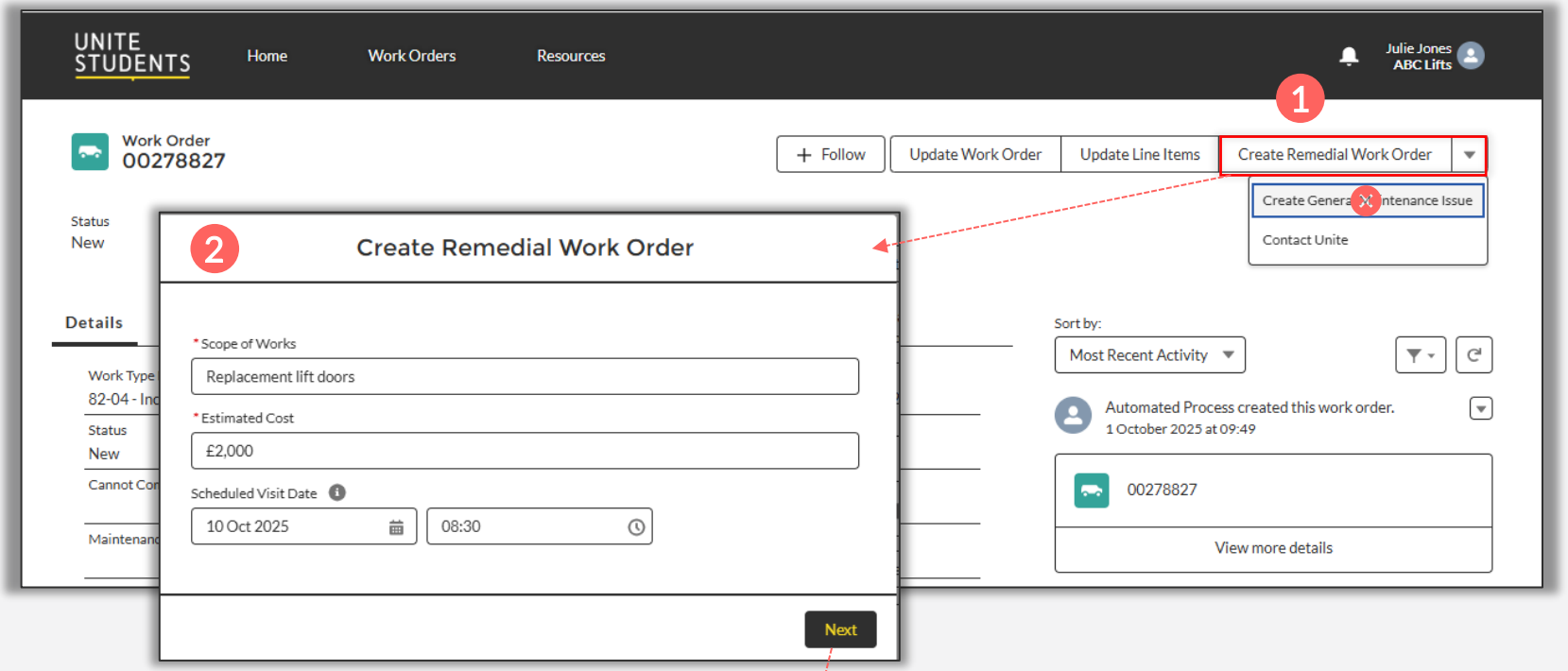
01 Create Remedial Work Order

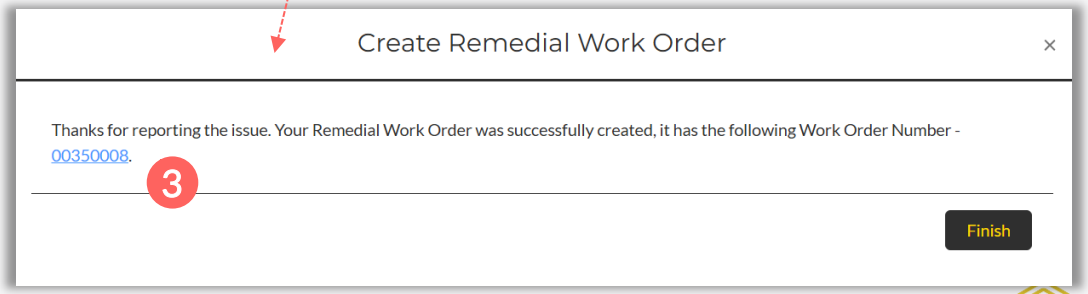
Open PPM work order for asset that needs remedial work and click *Create Remedial Work Order*

02 Add detail

- Scope of works
- Estimated Cost
- Priority level
- Proposed visit date
- Upload relevant documents

03 New Remedial work order created





Check

Click into the new remedial work order, the status should be *Quote Proposed.*

Next Step

Wait for quote to be approved and proceed as for a reactive work order.

Top Tip

If you aren't sure about a proposed date at this stage, you can enter it later.

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Thank you.

If you have any questions, please visit our Supplier Zone, or reach out to your main contact at Unite Group.