



Wisconsin Housing Preservation Corp.

Capital Expenditure (Cap Ex) Website User Guide

<https://capex.whpc.com>

whpc
Wisconsin Housing Preservation Corp.

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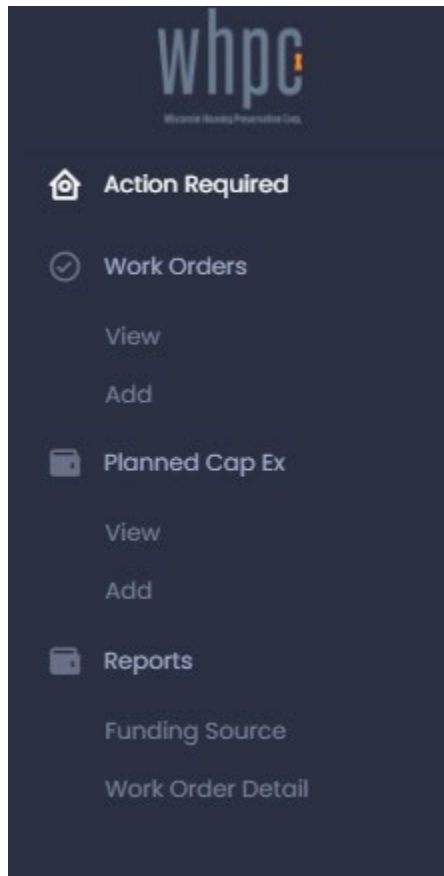
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Navigation Pane



Action Required: The Action Required Page displays Work Orders items that are in process.

Work Orders – These were previously called “funding requests.” They are for work being proposed to be done immediately. They can either be Work Orders that were Planned Cap Ex or Emergency Requests.

Work Orders View:

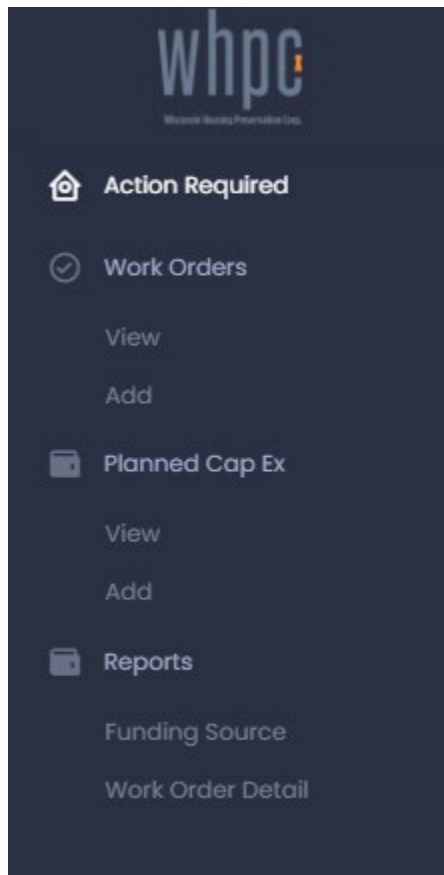
All Work Orders submitted (added) will be viewable here. These are the statuses the Work Order can be in:

- **Requested** - submitted by Property Management user, no action taken yet
- **Under Review** - approved by at least one WHPC user
- **Denied** - denied by a WHPC user
- **Cancelled** - cancelled by Property Management user before any action taken
- **Approved** - approved by all users in workflow
- **Final** - work completed and final invoice and funding info completed by Accounting user

Work Orders Add:

This page is for the entry of a new Work Order. Each Work Order will be connected to an apartment name, address for the specific building, and unit number. If the Work Order is for common area within a building, unit number is not required. If the work is not connected to the building (retaining wall, sidewalks, etc.), “Not Applicable” may be used.

Navigation Pane (cont.)



Planned Cap Ex – These were previously called the “5-year Cap Ex budgets.” These items are Cap Ex items being planned for future years. While many Cap Ex items will be within the next five years, there is no limit on the future year. Also, Planned Cap Ex items can be entered year-round.

There will be an annual deadline in the fall for item entry for the next year. WHPC will communicate the exact date.

Planned Cap Ex View:

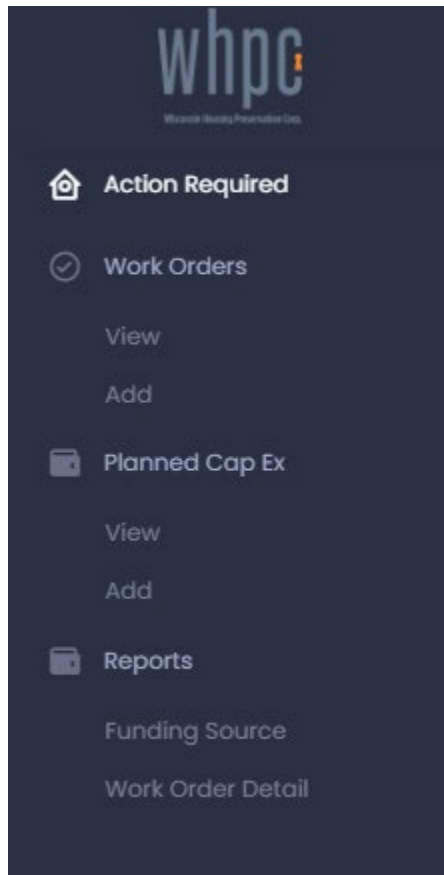
All Planned Cap Ex submitted (added) will be viewable here. These are the statuses Planned Cap Ex can be in:

- **Requested** – Property Management user entered item
- **Cancelled** - cancelled by Property Management user before WHPC Asset Management user review
- **Denied** - denied by WHPC Asset Management user
- **Pre-Approved, Ready for Work Order** – pre-approved by WHPC Asset Management user
- **Work Order Submitted** – Property Management user submitted work order attached to planned item

Planned Cap Ex Add:

This page is for the entry of new Planned Cap Ex items. Each will be connected to an apartment name and address for the specific building. If the work is not connected to the building (retaining wall, sidewalks, etc.), “Not Applicable” may be used.

Navigation Pane (cld.)



Reports – These pages allow generation of comprehensive reports with options to export to Excel.

Reports Funding Source:

The Reports Funding Source page is primarily for Accounting.

Reports Work Order Detail:

The Reports Work Order Detail page provides comprehensive data of all Work Orders.

Action Required



The Action Required Page displays Work Orders items that are in process:

Work Order List

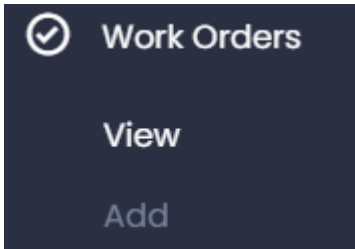
Work Order ID	Apartment Name	Address	Unit #	Work Type	Amount	Waiting On	Workflow	Status	Created At	History	Notes
141	Lake Manor	567 Park Ave	26	Windows	9,800.00	Brian Coda 3		Under Review	02-18-2025 07:40:26 PM		
138	Lake Manor	567 Park Ave	25	Landscaping	9,999.00	Brian Coda 3		Under Review	02-18-2025 07:18:55 PM		

Records per page

50

1

Work Orders View



The Work Orders View page displays all Work Orders for the property. Users can apply filters and sort based on needs:

Work Order List
This is list of work orders.

Select status ▼ Select work type ▼ Select apartment ▼ Search Apply Filter Reset

Work Order ID	Apartment Name	Address	Unit #	Work Type	Amount	Waiting On	Workflow	Status	Created At	History	Notes
33	Lake Manor	567 Park Ave		Boiler	20,000.00	-	☑	Denied	01-08-2025 12:59:18 AM	🕒	📄
143	Lake Manor	567 Park Ave	252	Cabinets & Countertops	5,421.00	-	☑	Denied	02-19-2025 12:27:11 PM	🕒	📄
51	Lake Manor	567 Park Ave		Damage roof	300,000.00	-	☑	Denied	01-08-2025 02:12:27 PM	🕒	📄
92	Lake Manor	567 Park Ave		Decks	8,000.00	-	☑	Final	01-21-2025 09:23:44 AM	🕒	📄
50	Whispering Pines	555 Evergreen Lane		Furniture	6,000.00	-	☑	Denied	01-08-2025 02:10:56 PM	🕒	📄
138	Lake Manor	567 Park Ave	25	Landscaping	9,999.00	Brian Coda 3	☑	Under Review	02-18-2025 07:18:55 PM	🕒	📄

The History link shows the flow of the Work Order thru the decision process:

Activity Log ✕

✓	Leah Wells (AM) approved the work order.	03-10-2025 05:10:52 PM
💬	Leah Wells (AM) added a note to the Work Order.	03-10-2025 05:10:52 PM
⊕	Steve Lowe (PM) added to the Work Order.	02-18-2025 07:40:26 PM

The Notes link shows all notes entered by Property Management users and WHPC users in the process:

Notes

Joe Carpenter

01-28-2025 07:55:35 PM

Would like to see a new bid.

Brian Coda

01-28-2025 07:31:51 PM

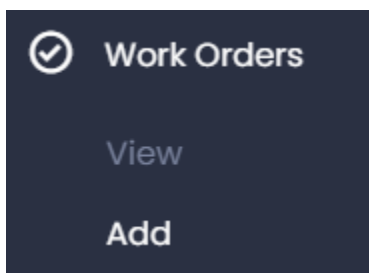
I only entered \$15,000 of funding sources, not \$20,000. 1/28/25

Steve Lowe

01-23-2025 04:20:45 PM

Roof leaking on tenants.

Work Orders Add



The Work Orders Add page allows the Property Management user to submit bids for approval. If this was a planned item, it will be connected to that planned item. If it was not planned, it is considered an “Emergency Request.”

This page is for the entry of a new Work Order. Each Work Order will be connected to an apartment name, address for the specific building, and unit number. If the Work Order is for common area within a building, unit number is not required. If the work is not connected to the building (retaining wall, sidewalks, etc), “Not Applicable” may be used.

ADD NEW WORK ORDER

Apartment Name

Address ☐ Not Applicable

Unit Number

Work Type

Insurance Claim ☐ Yes

Amount

Attach up to 3 bids.

Bid 1

N..n

Bid 2

N..n

Bid 3

N..n

Please either check the *Emergency Request* or select a *Planned Cap Ex Item*.

Emergency Request ☐

Planned Cap Ex Item

Reason for Request

Entered By

Other Attachments No file chosen

To attach multiple files, click "Choose Files" and then after the file selection dialog box appears, hold down the Ctrl key as you select the files to add.

ADD

CANCEL

First, select the Apartment Name. Next, select the building address the work is being done at. If the work is being done at multiple buildings, select this Multiple Buildings address. If the work is not building related (retaining wall, sidewalks, etc.), select “Not Applicable” checkbox.

ADD NEW WORK ORDER

Apartment Name: Englewood Apartments

Address: Select Building ☐ Not Applicable

Unit Number: 2315 Corona Ave (Office)

Work Type: 2305 Corona Ave

Insurance Claim: 2307 Corona Ave

Amount: 2309 Corona Ave

Attach up to 3 bids.

Bid 1: Choose Files No file chosen

Bid 2: Choose Files No file chosen

Bid 3: Choose Files No file chosen

The RealPage ID, Parent Name, and Legal Name will auto populate. If for a unit, enter the Unit Number. Enter Work Type. If part of an insurance claim, select the toggle. Enter the amount.

ADD NEW WORK ORDER

Apartment Name: Englewood Apartments

Address: 2305 Corona Ave ☐ Not Applicable

Realpage Id: 11860

Parent Name: Englewood/Barrington Apts (Scattered)

Legal Name: WHPC-EBHG Bond Pool, LLC

Unit Number: 1-305-1

Work Type: Flooring: Units

Insurance Claim: ☒ Yes

Amount: 7,465

Attach each of the bids. If this is an Emergency Request (not planned for), click the checkbox. If this was planned, select the Planned Cap Ex Item from the dropdown. **Note:** Due to one-time, WHPC bulk import of previous budgets (2025-2029), you may have to select “Multiple Buildings” for the address of the building.

The item selected should be within this fiscal year. If not, the system will alert you. If the item is absolutely needed outside of the planned fiscal year, this should be explained in the Reason for Request.

The Reason for Request should include a narrative on the bids, the contractors, and a recommendation. These are the notes describing the “why” behind this Work Order. The narrative should be descriptive so the request and details of the bids are very clear.

Enter your full name. If there are additional attachments that were not part of the bid file, upload them in “Other Attachments.”

Attach up to 3 bids.

Bid 1

Choose Files

DUMMYBID1.pdf

Bid 2

Choose Files

DUMMYBID2.pdf

Bid 3

Choose Files

No file chosen

Please either check the *Emergency Request* or select a *Planned Cap Ex Item*.
Work Order request is for an item not budgeted in the current year.

Emergency Request ☐

Planned Cap Ex Item ✖ 878, 2026, Exterior Building Systems: Other , \$6,000

Reason for Request Adding gutters to prevent erosion outside. Talked with AM on. The difference between Contractor 1 and Contractor 2 is Contractor 2 is harder to get ahold of. They also did not provide a comprehensive estimate of specifications and materials. They are cheaper but worry about reliability. My recommendation is to go with Contractor 1.

Entered By James Smith

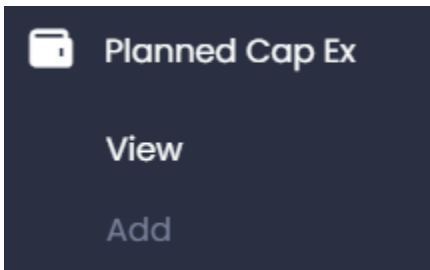
Other Attachments Choose Files 2 files

To attach multiple files, click “Choose Files” and then after the file selection dialog box appears, hold down the Ctrl key as you select the files to add.

ADD

CANCEL

Planned Cap Ex View



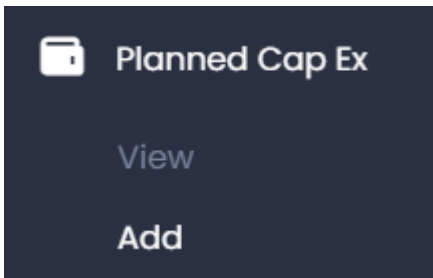
The Planned Cap Ex View page displays all Planned Cap Ex for the property. Users can apply filters and sort based on needs.

Select status	Select Year	Select work type	Select property	Search	Apply Filter	Reset
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Item ID	Year ↑↓	Worktype Name	Estimated Amount ↑↓	Address ↑↓	Apartment Name ↑↓	Status ↑↓	Created At ↑↓
47	2025	Exterior Building Systems: Roof	50,000.00	WHPC Imported (11090)	Pleasant View Apartments	Pre-Approved, Ready for Work Order	05-27-2025 12:00:00 AM
55	2025	Exterior Building Systems: Gutters and Downspouts	45,000.00	WHPC Imported (10480)	Thousand Oaks Apartments	Pre-Approved, Ready for Work Order	05-27-2025 12:00:00 AM
84	2025	Electrical: Other	30,000.00	WHPC Imported (10870)	Neillsville Manor	Pre-Approved, Ready for Work Order	05-27-2025 12:00:00 AM
91	2025	Land Improvements: Parking Lot	30,000.00	WHPC Imported (10420)	Greenview Apartments - Ettrick	Pre-Approved, Ready for Work Order	05-27-2025 12:00:00 AM
96	2025	Exterior Building Systems: Decks & Porches	30,000.00	WHPC Imported (11670)	Songbird Apartments	Work Order Submitted	05-27-2025 12:00:00 AM
107	2025	Exterior Building Systems: Windows	25,000.00	WHPC Imported (10450)	Poplar Apartments	Pre-Approved, Ready for Work Order	05-27-2025 12:00:00 AM
128	2025	Doors & Locks: Exterior	20,000.00	WHPC Imported (11160)	Clear Lake	Pre-Approved, Ready for Work Order	05-27-2025 12:00:00 AM
129	2025	Doors & Locks: Exterior	20,000.00	WHPC Imported (10370)	Johnson Creek I & II	Pre-Approved, Ready for Work Order	05-27-2025 12:00:00 AM
130	2025	Electrical: Other	20,000.00	WHPC Imported (10860)	Pine Court Terrace	Pre-Approved, Ready for Work Order	05-27-2025 12:00:00 AM
187	2025	Doors & Locks: Interior	13,700.00	WHPC Imported (10980)	Elmar Court	Pre-Approved, Ready for Work Order	05-27-2025 12:00:00 AM
196	2025	Cabinets & Countertops: Other	12,000.00	WHPC Imported (10860)	Pine Court Terrace	Pre-Approved, Ready for Work Order	05-27-2025 12:00:00 AM

If the Planned Cap Ex item was planned for the current fiscal year, the year will be highlighted in green on the left of the page.

Planned Cap Ex Add



The Planned Cap Ex Add page is for the entry of new Planned Cap Ex items. Select the Apartment and then the address of the building. If it is multiple buildings, select Multiple Buildings in the Address field. “Not Applicable” checkbox will be added soon for non-building items, such as retaining walls and sidewalks.

Enter the work type, planned year, estimated amount, and detailed notes explaining more about the future work being planned.

ADD A NEW PLANNED CAPITAL EXPENDITURE

Apartment Name

Englewood Apartments

Address

2305 Corona Ave

Property Id

11860

Work Type

Cabinets & Countertops: Bath

Year

2028

Amount

Enter Amount

Notes

Enter Notes

ADD

CANCEL

Reports Funding Source



The Reports Funding Source page is primarily for Accounting:

Funding Source Report															
Select status		Select budget year		Select work type		Select property		Select Date Range		Search		Apply Filter	Reset	Export Excel	
Request ID	Apartment Name	Address	Unit #	Work Type	Date of Request	Budget Year	Status	Insurance Claim	Budget Item	Operating Cash	Grants	Replacement Reserve	WHPC Loan/Equity	Digital	
158	Rise-Madison (Townhouses)	Privet Drive	252	Cabinets & Countertops	05-14-2025		Requested	No	Emergency	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
157	Property - 1	West Tower	252	Sidewalks	05-07-2025	2022	Requested	No	Budgeted	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
156	Mendota Creek	1111 1st St		Windows	04-30-2025	2029	Under Review	No	Budgeted	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
155	Mendota Creek	1111 1st St		roof.	04-30-2025		Under Review	No	Emergency	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
154	Lake Manor	567 Park Ave	252	Roof	04-29-2025		Denied	No	Emergency	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
153	Mendota Creek	Not Applicable		Landscaping	04-24-2025		Cancelled	No	Emergency	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
152	Property - 4	Eris	252	Parking lot	04-17-2025		Requested	No	Emergency	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	

Reports Work Order Detail



The Reports Work Order Detail page provides comprehensive data of all Work Orders:

Work Order Detail Report												
Select status	Select budget year	Select work type	Select property	Select Date Range	<input type="text" value="Search"/> <input type="button" value="Apply Filter"/> <input type="button" value="Reset"/> <input type="button" value="Export Excel"/>							
Request ID ↑↓	Apartment Name ↑↓	Address ↑↓	Unit # ↑↓	Work Type ↑↓	Date of Request ↑↓	Budget Year ↑↓	Status ↑↓	Insurance Claim ↑↓	Budget Item ↑↓	Estimated Amount ↑↓	Final Amount	
158	Rise-Madison (Townhouses)	Privet Drive	252	Cabinets & Countertops	05-14-2025		Requested	No	Emergency	\$8,000.00	\$0	
157	Property - 1	West Tower	252	Sidewalks	05-07-2025	2022	Requested	No	Budgeted	\$8,000.00	\$0	
156	Mendota Creek	1111 1st St		Windows	04-30-2025	2029	Under Review	No	Budgeted	\$5,559.00	\$0	
155	Mendota Creek	1111 1st St		roof.	04-30-2025		Under Review	No	Emergency	\$5,555.00	\$0	
154	Lake Manor	567 Park Ave	252	Roof	04-29-2025		Denied	No	Emergency	\$8,000.00	\$0	
153	Mendota Creek	Not Applicable		Landscaping	04-24-2025		Cancelled	No	Emergency	\$5,000.00	\$0	
152	Property - 4	Eris	252	Parking lot	04-17-2025		Requested	No	Emergency	\$8,000.00	\$0	
151	Mendota Creek	1111 1st St		Cabinets & Countertops	04-16-2025	2025	Requested	No	Budgeted	\$9,999.00	\$0	
150	Mendota Creek	1111 1st St		Decks	04-16-2025	2028	Final	No	Budgeted	\$9,999.00	\$8,889	
149	Mendota Creek	1111 1st St	123	Cabinets & Countertops	04-15-2025	2026	Cancelled	No	Budgeted	\$5,112.00	\$0	

Website Troubleshooting

Any technical issues should be directed to Brian Coda (bcoda@whpc.com).