

VendorShield Process Revised: 01/11/2023

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Property Managers – Inviting Brand New Vendors

Property Managers have read-only access to VendorShield and <u>do not have access</u> to invite vendors. Please connect with your Regional Property Supervisor to invite a vendor to VendorCafé.

Please note, vendors are required to complete their VendorCafé profile and submit the required COI and W9. No documents will need to be gathered by the Property Manager. Once the vendor has been approved by the VendorShield Team, EAH Facilities, and EAH Accounting, the vendor will be added in Yardi as **Approved**.



Brief Overview of VendorShield Process



Process for Brand New Vendors - VendorShield (Work Performed on the Property)

(Used for VendorShield Certified On-Site Vendors)

- 1) Regional Property Supervisor sends an invite to vendor through VendorShield
- 2) The Facilities Team will review and approve the vendor in VendorShield Note: Once the new vendor is approved in VendorShield and a V code assigned, it will flow in Voyager as Pending with no workflow attached for the AP Admin team to review
- 3) The AP Admin Team will select VendorShield as the workflow in Yardi. The AP Admin Team will review the vendors W9 information and existing V-codes to avoid duplicates
- 4) Approval
- 5) Rejection

Process for Wavier/Exempt Vendors (Emergencies Only)

(Used for Non-Certified On-Site Vendors needing Proof of Insurance – Waiver/Exemption)

- 1) Originator (Resident Manager) enters the vendor information in Yardi. Notify Regional Property supervisor.
- 2) Regional Property Supervisors collect Certificate of Insurance & W9, attach to vendor in Yardi.
- 3) Once all required documents are uploaded, the Regional Property Supervisor updates the vendor workflow to: **Waiver/Exempt** in Yardi.
- 4) Operations (Katelyn Siegel & Sam Peterson) reviews based on the insurance requirements.
- 5) AP Admin (Yennsen, Jack and Alex) Review W9 information and existing V-codes to avoid duplicates.
- 6) Approval
- 7) Rejection

Process for Off-Site Vendors (Purchase of Supplies/Materials, Utilities, etc.)

(Employees, New Utility Vendors, or Off-Site Vendors/Suppliers)

- 1) Originator (Resident Manager) enters the vendor information in Yardi. Notify Regional Property supervisor
- 2) Regional Property Supervisors collect W9, attach to vendor in Yardi.



- AP Admin (Yennsen, Jack and Alex) Review W9 information and existing V-codes to avoid duplicates.
- 4) Approval
- 5) Rejection

Process for Existing Vendors

- 1) Regional Property Supervisor reviews vendor compliance through VendorCafé
- 2) If Vendor is in compliance and approved, RPS sends email to AP Admin (Yennsen, Jack and Alex) at <u>UDG-REMAPAdmin@eahhousing.org</u>.
- 3) AP Admin (Yennsen, Jack and Alex) add property to Vendor Property List and notify site manager and RPS.

New Property Take Overs

An email should be sent to the Accounting Manager and Supervisor at least 2-3 weeks before taking on new properties which lists current vendors used by the property along with copies of the latest invoices to confirm the remit to address for payments.

How to See if a Vendor is Approved in Yardi

Vendor

From the **PAYProp 7s or PAYAprv 7s** role, from the left side menu, click on Setup \rightarrow Vendor \rightarrow Review Vendor



Search for the vendor. Once you locate the correct vendor, click on **Submit**.

_									
	<u>Vendor</u>	v0000014		New Im Segund	age R o CA '	Reglazing, 90245	P.O. Box	1622 El	
	Last Name		1						
	AddressZip								
	Telephone Nos.								
	Tax Id								
	Fed Name								
	Workers Comp Exp.				-to-				
	Tax % >=								
	Status	~							
	Notes								
	Remittance Vendor								
	Display Rows	5000							
		Submit	C	ear		Help			

Within the vendor record, click on the **General** tab. Vendor's that have the status of approved with upto-date Liability and Workers Comp insurance dates are considered <u>approved vendors</u>.



Vendor		Data 💌					
ode	v0001526		Telephone			Workflow	
ompany	JNJ Hauling		Office	(310) 951-8189	-	Status	
ame			Home	(310) 307-1708		Current Step	
ear			Cell	(310) 324-8339	-	Next Step	
ontact			4		۱.	Notes	
ddress			Checks				
			Payment Meth	od Check			
	_		Consolidate	×			
ty Time	and the second s		Check Memo F	rom Inv			
ate-Zip			PO Required	•			
Mail			No Signature				
t			On Checks Ov	er 0.00			
			Memo				
			No Duplicate I	nvoice on			
			Stop Purchase	Orders			
<u>E</u> dit	New Close	Help					
Tax Info	General Othe	r Info Workflow	Approvers				
			Approvers				
-							
Status	Approved	URL			Discount/Paym	ent Terms	
Employee		Notes			Percent		
Preferred S	Supplier				Day	0	
Region					Days from Invoice		
Expense Ty	ype				Day of the Month	۲	
Default Dis	splay Type				Payment Terms	0	
Usual Acco	ount						
To Crodit C	and Vender						
is credit c					Insurance Expi	ration	
Retention	Percent				Liability	06/19/2023	
					Workers Comp	01/30/2023	
							ń

Regional Property Supervisors – Inviting a Brand New Vendor to VendorShield

Step 1) Within the EAH Yardi, navigate to the '**PayAprv 7**s' role. If you do not see the role, you may already be in it. Process to the next step.

	Community Manager [Dashboard - Sundan
• Roles	Resident Activity	
h Catur	EAH_PROP_202D_7S	0
• Setup	Maintenance	0
Administration	MMW 7s	0
Analytics	MPRW 73	0
Reports	PAYAprv 7s	<u>18</u>
h 50050 Eventione	Payment Processing Admin	0
 S0059 Functions 		0
▶ 50059 Tools	Regional Manager Dashboard	0
TRACS	Scheduled Lease Renewals	0

Step 2) From the top-menu, click on **Dashboards** \rightarrow **VendorCafé Dashboard**.



	Hom Dashboards Analyt	ics Help Logout
	Pa PO Dashboard	
	Invoice Register Das	hboard
▶ Roles	Rea Workflow Dashboard	
Reports	VENDORCafe Dashbo	bard
Vendor	Workflow in Progress	

Step 3) Next to the Invite New Vendor button, enter the email address or name of the vendor. Then click **Invite New Vendor**.

VendorShield Dashboard 🕄 Vendor Code / Name Go Search 1 HOUR DRAIN Invite New Vendor	Functions × Review × Reports × Setup ×									
	VendorShield Dashbo	oard 🚯	Vendor Code / Name	Vendor Code / Name Go Search		1 HOUR DRAIN				
CLIENT / VENDOR ACTION REQUIRED 262 COMPLIANCE SUMMARY 145 COMPLIANCE FLOW 77 SUMMARY 3,082	CLIENT / VENDOR ACTION REQUIRED	ଅ expiration 26	ට 2 compliance summary	COMPLIANCE FLOW	S 77 summary	3,082				
Client / Vendor Action Required —	Client / Vendor Action Re	equired				—				
Description 30 Days Over 30 Days Total		Description	30 Da		er 30 Davs	Total				

Step 4) If your vendor appears in the search list, click **Invite Vendor**. If you do not see the vendor, please proceed to the next step.

Functions V Review V Rep	orts · Secup ·											
	VendorC	Cafe®	1 HOUR D	DRAIN			SEARCH			HOME		
		rc Or	Filter by Vena details or Acc	ind the righ dorShield Verified cepts Yardi Card to	t vendor for for the most recer see vendors acce	r your nee nt compliance o pting virtual co	ds and insurance ard payments.	GendorSh	serd V			
				QUICI	VENDOR SEAR	ксн						
		đ	4	٥	☆ 🏶		×.	8	7			
		looping Convision	Electricians	Plumbers Ro	ofers HVAC	Landscaping	Pest Control	Cabinetry	/ Painters			
	C	leaning services										
Showing results for: 1 HOUR	C	leaning services					Didn't find t	he vendor yo	u were looking	g for? Invite a	a new vendo	2
Showing results for: 1 HOUR DRAIN	C	rearing services		5-5-61-700 <u>0</u> 0 83		3 5	Didn't find t	he vendor yo	u were looking	g for? Invite	a new vendo	:
Showing results for: 1 HOUR DRAIN Filter Your Results	Map Sa	tellite		25-25-7-7-7-2005		3 Si Res	Didn't find t earch 👔	he vendor yo v Show Map	u were looking VendorShiel	g for? Invite a	a new vendor	Accepts Yardi Car
Showing results for: 1 HOUR DRAIN Filter Your Results	Map Sa	tellite Gallaher Comp 1 Hour Drain	pany dba	VendorShield" Veri	× fied	3 Si Res	Didn't find t earch ults Gallaher Com	he vendor yo I Show Map pany dba 1	u were looking VendorShiel Hour Drain	g for? Invite a	a new vendoi My Vendor Ve	Accepts Yardi Car
Showing results for: 1 HOUR DRAIN Filter Your Results Country United States	Map Sa	tellite Gallaher Comp 1 Hour Drain 1280 Jose 04 991	pany dba 12 US	VendorShield" Veri	fied r	3 S Res	Didn't find t earch wits Gallaher Com 1280 N 10th stree	he vendor yo Show Map pany dba 1 h	u were looking VendorShiel Hour Drain	g for? Invite a	a new vendor My Vendor Ve	Accepts Yardi Car ndorShield' Verified
Showing results for: 1 HOUR RRAIN Filter Your Results Country United States	Map Sa	tellite Gallaher Comp 1 Hour Drain 1280 N 10n street San Jose CA 981 Phone: (888) 608-6	pany dba 12 US 8886	VendorShield" Veri	fied r	3 Si Res	Didn't find t earch uits Gallaher Com 1280 N 10th stree San Jose, CA 951 Phone: (888) 608-	he vendor yo Show Map pany dba 1 h t 12 US 6886	u were looking VendorShiel Hour Drain	g for? Invite a	a new vendor My Vendor Ve	Accepts Yardi Car ndorShield' Verified Invite Vendor
Showing results for: 1 HOUR DRAIN Filter Your Results Country United States	Map Sa	tellite Gallaher Comp 1 Hour Drain 1280 V Ton street San Jose CA 9911 Phone (898) 608-6	pany dba 12 US 5886	VendorShield' Ver	fied r	3 S Res	Didn't find t earch ults Gallaher Com, 1280 N 10th stree San Jose, CA 951 Phone: (888) 608-	he vendor yo Show Map pany dba 1 1 t 12 US 6886	u were looking VendorShiel Hour Drain	g for? Invite a	a new vendor My Vendor Ve	Accepts Yard Cal ndorShield' Verified Invite Vendor Additional details
showing results for: 1 HOUR RRAIN Filter Your Results Country United States	Map Sa	tellite Gallaher Com 1 Hour Drain 120 V How two San Jose CA 931 Phone (88) 508-5	pany dba 12 US 5886	VendorShield' Veri Invite Vendo	fred	3 S. Res	Didn't find t earch III Gallaher Com 1280 N 10th stree San Jose, CA 951 Phone: (888) 608-	he vendor yo Show Map pany dba 1 I t 12 US 56886	u were looking VendorShiel Hour Drain	g for? Invite : d Verified	a new vendou My Vendor Ve	Accepts Vardi Cai Indor Shield' Verified Invite Vendor Additional details
showing results for: 1 HOUR RAIN Filter Your Results Country United States State Search by State	Map Sa	tellite Gallaher Com 1 Hour Drain 1200 N 10n street Ser Jose Ca 931 Phone (88) 505-5	pany dba 12 US 5536	VendorShield' Veri Invite Vendo	fred	3 S. Res	Didn't find t earch III Gallaher Com, 1280 N 10th stree San Jose, CA 951 Phone: (888) 608- Gallaher Com, connor@gallaherc	he vendor yo Show Map pany dba 1 l t 12 US 6886	u were looking VendorShiel Hour Drain Hour Drain	g for? Invite :	a new vendor My Vendor Ve	Accepts Yardi Ca ndor Shield' Verified Invite Vendor Additional details
Showing results for: 1 HOUR DRAIN Filter Your Results Country United States.	Map Sa	tellite Galaher Com 1 Hour Drain 280,004,004 Sences Case Sences Ca	pany dba 12 US 5886	VendorShield' Veri Invite Vendo	fred	3 S Res	Didn't find t earch wilts Gallaher Com 1280 N 10th stree San Jose, CA 951 Phone: (888) 608- Gallaher Com, Conno(@gallaherc 1280 N 10th Stree	he vendor yo Show Map pany dba 1 i t 12 US 6886 pany dba 1 i o.com t	u were looking VendorShiel Hour Drain Hour Drain	g for? invite a	a new vendor My Vendor Ve	Accepts Vardi Cai IndorShield' Verified Invite Vendor Additional details IndorShield' Verified Invite Vendor
Showing results for: 1 HOUR DRAIN Filter Your Results Country United States ~ State Search by State ~ City	Map Sa	tellite Galaher Com 1 Hour Drain 1200 N 106 street Sen Jose (888) 508-0	pany dba 12 US 8806	VendorShield' Veri Invite Vendo	fred	3 S Res	Didn't find t sarch ults Gallaher Com, 1280 N 10th stree San Jose, CA 551 Phone: (888) 608- Gallaher Com, Connor(@gallaherc 21200 N 10th Stree San Jose, CA 551	he vendor yo Show Map pany dba 1 li t 12 US 6886 pany dba 1 li 0.com t 12 US 2315	u were looking VendorShiel Hour Drain Hour Drain	g for? Invite a	a new vendor My Vendor Ve	Accepts Verdi Car ndor Shield' Verified Invite Vendor Additional details Invite Vendor Additional details

5

Step 5) Right below the Quick Vendor Search, click on Invite a New Vendor.



VendorCafe [®] Enter keywords like 'Landscaping' SEARCH										HOME
Vc Find the right vendor for your needs VendorShield Filter by VendorShield Verified for the most recent compliance and insurance details or Accepts Yardi Card to see vendors accepting virtual card payments. VendorShield										
	đ	۶	٢	ᡎ	*	*	<u>ال</u>		7	
	Cleaning Services	Electricians	Plumbers	Roofers	HVAC	Landscaping	Pest Control	Cabinetry	Painters	

Didn't find the vendor you were looking for? Invite a new vendor.

Step 6) Complete the Invite Vendor Form. All blue fields are required. Click **Save**.

Invite Vendor

Tax ID			
Vendor Code			
Name			
Email To			
Client Comments			
Internal Cc for Compliance Status			
Payment Method	Check •		
Payment Method Vendor Agreement	Check • Required •		
Payment Method Vendor Agreement Send to VendorShield	Check Required Yes		
Payment Method Vendor Agreement Send to VendorShield Compliance Policy	Check Required Yes		
Payment Method Vendor Agreement Send to VendorShield Compliance Policy Status	Check Required Yes		
Payment Method Vendor Agreement Send to VendorShield Compliance Policy Status Invited By	Check Required Yes		

Step 7) Select the vendor category and choose the appropriate properties the vendor will be servicing by checking the box. Then hit "Invite Vendor".



			Select	t Property Code	Property Name	Address	City	State	Zip
Save Invite Vendor				1459old	4507 Main St EAH LLC - OLD	Los Angeles	Los Angeles	CA	90037
		1366	Avenida Terrace L.P.,	245 South Avenue 54,Los Angeles	Los Angeles	CA	90042		
				1370	Casa Rampart, L.P	401, 512 So. Rampart Blvd.,Los Angeles	Los Angeles	CA	90057
Category Properties Compliance Setup				1372	Hojas de Plata, LP	1515 N. Orange Ave.,Los Angeles	La Puente	CA	91744
				1489	Martel EAH LLC	1041-49 N. Martel Avenue, Los Angeles	West Hollywood	CA	90046
Category	Search			1376	Parkview on the Park Senior Apartments	622-628 South Alvarado St.,Los Angeles	Los Angeles	CA	90057
				1388	Villas at Gower	1726 N Gower St., Los Angeles	Los Angeles	CA	91343
a a (120 Pecerd(c) found)				1390	Wills Avenue	14731 Rayen St.,Los Angeles	Los Angeles	CA	91402
				1352	1103 Lincoln	1103 Lincoln Avenue, Marin	San Rafael	CA	94901
				1459	4507 Main St EAH LP	Los Angeles	Los Angeles	CA	90037
Select Name	Category Code	Send to VendorShield		1402	626 Del Ganado	626 Del Ganado, Marin	San Rafael	CA	94903
		for Compliance		1295	Arbor Court	4830 E. Laurel Avenue, Fresno	Fresno	CA	93727
CA / HI Standard Electrical	CA Standard Rick	Voc		1292	Archway Commons	1101 Carver Rd,Stanislaus	Modesto	CA	95350
	CA - Standard Kisk	CA - Standard Risk Yes			Archway EAH II LP	1101 Carver Road,Stanislaus	Modesto	CA	95350

Regional Property Supervisor - Reviewing a New Vendor Invitation

You can review the new vendor invitation by clicking on **Review** \rightarrow **Review Invite Vendor**.

	Review 🐣	Reports ~	Setup ~					
Invite Vendo	Review Invit	te Vendor						
invite venue	Review Emo	Review Email Templates						
Company	EAH15029							
Vendor Code								
Vendor Company Name			••••]					
Email								
Status			•					
Remittance Vendor	No	No						
Inactive	No		•					
Search Clear	Save							

Once the search is complete, you can see where your new vendor is in the account setup process. You can also re-invite the vendor from the same screen, if they lost their VendorCafé invitation.

Delete	Re- Invite	Vendor Code	Vendor Company Name	Email	Category	Profile Completion %	Invited By	Comments	Inactive
	<u>Re-</u> Invite	AIRTEC133359	AIRTECH SERVICE	cdudek@airtech.com	CA / HI - Standard - HVAC	0%	JANET.GUSMAN		No
	Re: Invite	ALLSEA135257	ALL SEASONS ROOFING SERVICES	Virgie@allseasonsroof.com	CA / HI + PL - Roofing	0%	KATIE.MILLER		No

Adding Additional Properties to a Vendors Property List

Please submit a ticket to <u>UDG-REMAPAdmin@eahhousing.org</u> with the vendors name, vcode, and properties you would like to have added.

Adding a Vendor in Yardi for Waiver/Exempt & Off-Site Vendors

Step 1) For Property Managers, navigate to the **PayProp 7s** Role. For Reginal Property Supervisors, navigate to **PayAprv 7s**.



Step 2) From the left side menu, select Vendor \rightarrow Add Vendor.

	 PayScan Dashboard 	
	Invoice Administration	
Roles	Ready for Entry/Keyed	3
▶ Reports	No Workflow Attached	0
▶ Vendor	Review Vendor ogress	127
Invoice Register	Add Vendor Posted	0
 Payable Processing 	Approved Posted	2
▶ Admin	Rejected	0

Step 3) Fill in all required fields highlighted in **yellow**. Complete all fields and **Save**.

*Please make sure to update the Workflow tab found on the right side to **Off-Site Vendor**. If this is not completed, the Accounting Team will not be able to review the vendor request within a timely manner.

YARD	VOYAGE	R		_						
	Home	Dashboards	Analytics I	Ielp I	Logout					
Vendor										
Code	(New)				Telephone	3			Workflow	OFF-SITE VENDO
Company	REQUIRED Vendor	Name			Office	REQUIRED	Vendor Phone #	-	Status	
Name					Home				Current Step	
Dear					FAX				Next Step	
Contact			_		Mobile			-	Notes	
Address	REQUIRED Vendor	Street Address			Checks					
					Payment Met	hod	Check		Ally	
-					Consolidate			CE!	014-	
City	REQUIRED Vendor	City			Check Memo	From Inv		U25		
State-Zip	CA V REQUIRE	O Vendor Zip Cod	le		PO Required	LS	UTING			
Country	usa		~		No Signature		UNI			
E-Mail	REQUIRED@Vendo	rEmailAddress.co	<u>m</u>		On Checks O	accu	0.00			
AIL					Memore	n -				
					No Duplicate	Invoice on.				
					Stop Purchas	e Orders				
Save	New	<u>Close H</u>	elp							
Tax Info	General (Other Info	Workflow	A	pprovers	Remitta	nce Vendors			
-								· · · · ·		
Coto										
Gets	None	~								
I.D.	REQUIRED Ve	endor tax I								
Name										
Sales Tax %	%									

Step 4) When entering Employee records in Yardi, update the Tax Info tab as EMPLOYEE.



	Tax Info	General	Other Info	Workflow	Approvers	Remittance Vendors	L
l	Gets	None					
L	I.D.						
	Name	EMPLOYEE					
	Sales Tax %						

Step 5) Attach any necessary documentation by clicking on Data \rightarrow Attachment.

Vendor		Data 💌			Jump To
Code	v00000123	Attachment	Housing Cafe Registration Code	VC - Market	VC - Active - Inactive Vendor
Company	REQUIRED Vendor Name	Memo	EFT Setup (New)	VC - Producer Details	VC - UDFs
Name		Contact	US Bank	VC - Insurance Details	WF Payment Manager
Dear		Email	rCash PAY	VC - Request History	Prop List
Contact		EFT Setup	VC - Compliance History	VC - EFT Request	
Address	REQUIRED Vendor Street Address	Ledger	VC - Category	VC - Request Vendor Data	

Step 6) When the pop-up appears, click on Upload \rightarrow Choose File \rightarrow Select the File you want to upload \rightarrow Open.



Attachments

Available Attachments for Vendor: REQUIRED Vendor Name (v00000123)

Sort By: Vorde	r: Ascending 🖌 Go						
Туре	Description	Date	Attachment	Secure	Show on Portal	Detach	
Save Close	Add Upload						
File Attachment Upl	oad 🗅 Open						×
Select up to 3 files Choose File No file ch	to upload an Organize ▼ N osen	> This PC > Downloa New folder	ds 🗸	ũ		Downloads	
	😫 Docul 🖈 ^	Name Vast week (1)	+	7	ate modified		Type
Choose File No file ch	osen 🔤 This PC		•		, 13/2022 3.31		AutorActor
Choose File No file ch	osen 🗾 Desktop 🧡	< File name: Vendor Atta	chment	~	All files		> Cancel
Upload <u>C</u> lo	ose				open		

Step 7) Next, push the vendor record to the next step for approval by clicking on Edit \rightarrow Select Next Step \rightarrow Click Save. Once saved, the current step field will reflect the next approval level.

Workflow	VENDOR REQUEST	
Status	InProcess	
Current Step	1 VENDOR CREATION	
Next Step	~	
Notes		-
	3 ACCT MANAGER APPROVAL	

Reviewing a Pending Vendor in Yardi – Non-VendorShield Vendors Step 1) Navigate to the PayScan Role and click on Workflow Dashboard.



ome Shop Now Dashboards Analy	tics Help Logout				* • •
PayScan Dashboard					
Invoice Administration		Payable Administration		Thursday, August 1	18, 2022
Ready for Entry/Keyed	3	Unposted Batches	0	Property	Go
No Workflow Attached	0	Pending Payment Approval	0	Vendor	
Workflow in Progress	<u>142</u>	Approved and Unpaid/Partially Paid	2	Date Range	
Approved not Posted	0				
Approved Posted	2			Add Vendor	PO Analytics
Rejected	0			Add PO	AP Analytics
				Add Invoice	Workflow Dashboard
				Add Payable	

Step 2) Update the filters to the following:

- Object Type Vendor
- Workflow Status InProgress
- Workflow Status 1 Property Manager or 2 Regional Property Supervisor
- Show for All Users Check the box

Click Display and click on the vendor code to review the vendors record.

ger Dashboa	rd			_				
Vendor	、 、	Show	Vendor Only	~	Show for All Users			
			-		Preferred Approver			
InProgress	、	/			Order By	Current Ste	р 🗸	
2 REGIONAL PR	OPERTY SUPERV	T:			Order	Ascending	\checkmark	
	I I							
<u>C</u> lear								
✓ Set	<u>Selected</u> <u>Set</u>	<u>All</u>	<u>Clear Selected</u>	<u>Clear All</u>				
Step	Vendor	Next	Steps	Approval Notes	Prev. Step	Notes	Vendor Name	
REGIONAL DR	<u>v0002499</u>		~				Innovative Pest Solutions	PC
	ger Dashboa	ger Dashboard	ger Dashboard Vendor Show InProgress 2 2 REGIONAL PROPERTY SUPERVI: Image: Clear Clear Clear Step Vendor Step Vendor Next REGIONAL v0002499	ger Dashboard Vendor Show Vendor Only InProgress v 2 REGIONAL PROPERTY SUPERVI: Clear Clear Clear Set Selected Set All Clear Clear Selected Step Vendor Next Steps REGIONAL v0002499	ger Dashboard Vendor Show Vendor Only ✓ InProoress ✓ 2 REGIONAL PROPERTY SUPERVI: Clear E E Clear Selected Clear All Step Vendor Next Steps Approval Notes REGIONAL V0002499 ✓ ✓	ger Dashboard Vendor Show Vendor Only Show for All Users pretered Approver Order By Order InProoress V Order By Order Qlear Clear Selected Clear All Step Vendor Next Steps Approval Notes Prev. Step REGIONAL V0002499 V V V	ger Dashboard Vendor Show Vendor Only InProoress Current Ste 2 REGIONAL PROPERTY SUPERVI: Order Qiear Giear	ger Dashboard Vendor Show Vendor Only Show for All Users Improgress InProgress Order By Current Step Order Image: Step of the st

Step 3) Review the vendor attachments by clicking on Data \rightarrow Attachments. After the record has been reviewed, push the vendor to the next step by clicking on Edit \rightarrow Update the Next Step dropdown.



Data 💌					Jump To
v0002499	Telephone		Workflow	ON-SITE VENDOR	
Innovative Pest Solutions	Office (800) Home	871-9878	- Status Current Step	InProcess 2 REGIONAL PROPERTY SUPER	
Jeff Stanford	FAX (760) Mobile	758-3969	Next Step	· · · · · · · · · · · · · · · · · · ·	
PO Box 927	Checks Payment Method	Check	- /	3 AP ADMIN REJECTION	
Vista CA 92085 usa compliance@innovativepestsolutions.com	Consolidate Check Memo From I Hold Payments PO Required No Signature On Checks Over Memo	nv	_		
New Close Help	No Duplicate Invoice Stop Purchase Order	e on			
V C U	Data • O002499 Innovative Pest Solutions eff Stanford O Box 927 Ista A 92085 sa ompliance@innovativepestsolutions.com New Glose Help	0002499 Telephone nnovative Pest Solutions Office (800) eff Stanford Office (800) 0 Box 927 Checks Ista Checks A 92085 Payment Method sa Consolidate check Memo From I Hold Payments PO Required No Signature On Checks Over Memo No Duplicate Invoice Stop Purchase Orde	Obta 0002499 nnovative Pest Solutions office (600) 871-9878 Home FX (760) 758-3969 Mobile O Box 927 Checks Payment Method Check Memo From Inv Hold Payments PO Required No Signature On Checks Over 0.00 Memo No Duplicate Invoice on Stop Purchase Orders	Obta Telephone Workflow 0002499 Office (800) 871-9878 Current Step Notes FAX (760) 758-3969 Notes 0 Box 927 Ohecks Notes Payment Method Check Notes Ista Consolidate Check Memo From Inv Notes A 92085 Polyments PO Required Notes sompliance@innovativepestsolutions.com On Checks Over 0.00 Nemo No Duplicate Invoice on Stop Purchase Orders Stop Purchase Orders	Od02499 Idephane Workflow Onovative Pest Solutions Office (800) 871-9878 Inprocess Current Step Regional PROPERTY SUPER FAX (760) 758-3969 Notes Mobile Notes I PROPERTY MANAGER A 92085 Apagnation Apagnation sa On Checks Intervent Step Policate Ono No Duplicate Invoice on Stop Purchase Orders Stop Purchase Orders Stop Purchase Orders

VendorShield Customer Support

Vendors may contact VendorShield Customer Support at:

Compliance and Certification Questions

- Email: <u>VendorShieldSupport@yardi.com</u>
- Phone: 1-877-890-8627

Registration/Email Questions

- Email: VendorCafe Support@yardi.com
- Phone: 1-877-890-8627

Internal VendorShield Support

EAH team members may send VendorShield escalation requests to:

<u>UDG-VSSupport@eahhousing.org</u>

For general VendorShield questions, please submit a ticket to:

<u>Bizsystemssupport@eahhousing.org</u>