

# VendorShield Process

Revised: 01/11/2023

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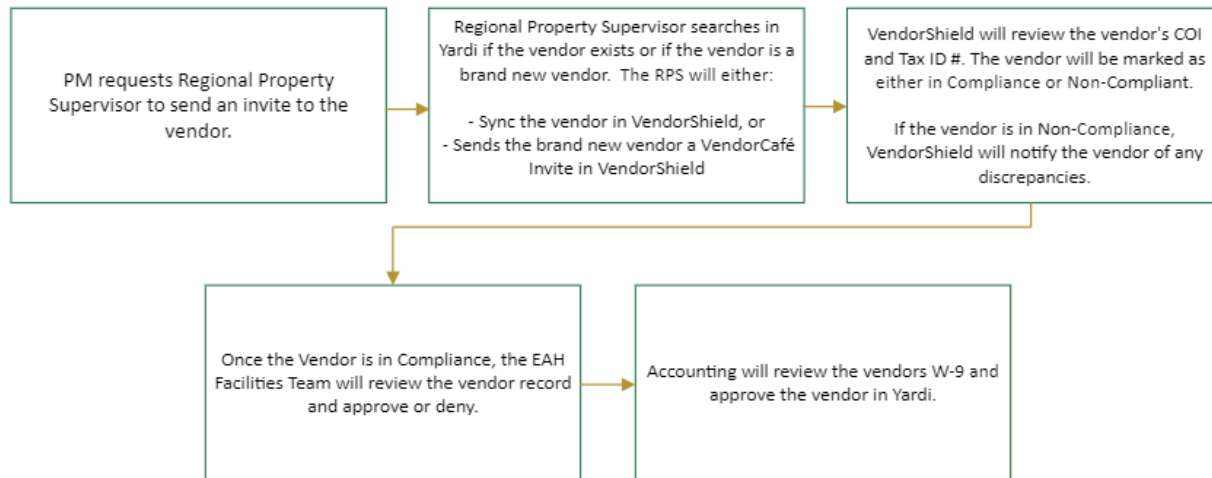
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## Property Managers – Inviting Brand New Vendors

Property Managers have read-only access to VendorShield and do not have access 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.

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

### Process for Existing Vendors

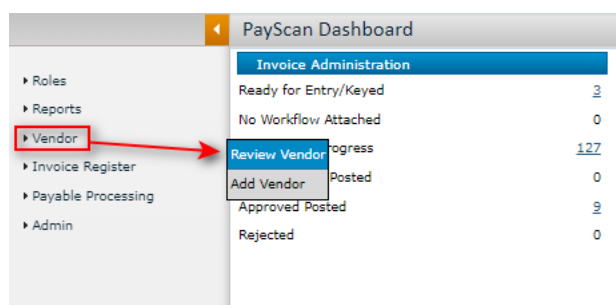
- 1) Regional Property Supervisor reviews vendor compliance through VendorCafé
- 2) If Vendor is in compliance and approved, RPS sends email to AP Admin (Yennsen, Jack and Alex) at [UDG-REMAPAdmin@eahhousing.org](mailto:UDG-REMAPAdmin@eahhousing.org).
- 3) AP Admin (Yennsen, Jack and Alex) add property 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

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



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

Vendor

**Vendor** v0000014

Last Name

Address..Zip

Telephone Nos.

Tax Id

Fed Name

Workers Comp Exp.  -to-

Tax % > =

Status

Notes

Remittance Vendor

Display Rows

New Image Reglazing, P.O. Box 1622 El Segundo CA 90245

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

**Vendor** Data ▾

Code	v0001526	<b>Telephone</b>	Workflow
Company	JNJ Hauling	Office	(310) 951-8189
Name		Home	(310) 307-1708
Dear		Cell	(310) 324-8339
Contact			
Address		<b>Checks</b>	
City		Payment Method	Check
State-Zip		Consolidate	<input checked="" type="checkbox"/>
Country		Check Memo From Inv	<input type="checkbox"/>
E-Mail		Hold Payments	<input type="checkbox"/>
Alt		PO Required	<input type="checkbox"/>
		No Signature	<input type="checkbox"/>
		On Checks Over	0.00
		Memo	
		No Duplicate Invoice on...	<input type="checkbox"/>
		Stop Purchase Orders	<input type="checkbox"/>

**Workflow**

Status	
Current Step	
Next Step	
Notes	

**Buttons:** Edit New Close Help

**Tax Info** **General** **Other Info** **Workflow** **Approvers**

<b>Status</b>	Approved	URL	
Employee	<input type="checkbox"/>	Notes	
Preferred Supplier	<input type="checkbox"/>		
Region			
Expense Type			
Default Display Type			
Usual Account			
Is Credit Card Vendor	<input type="checkbox"/>		
Retention Percent			

**Discount/Payment Terms**

Percent	
Day	0
Days from Invoice	
Day of the Month	
Payment Terms	0

**Insurance Expiration**

Liability	06/19/2023
Workers Comp	01/30/2023

## Regional Property Supervisors – Inviting a Brand New Vendor to VendorShield

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

**Community Manager Dashboard - Sundance**

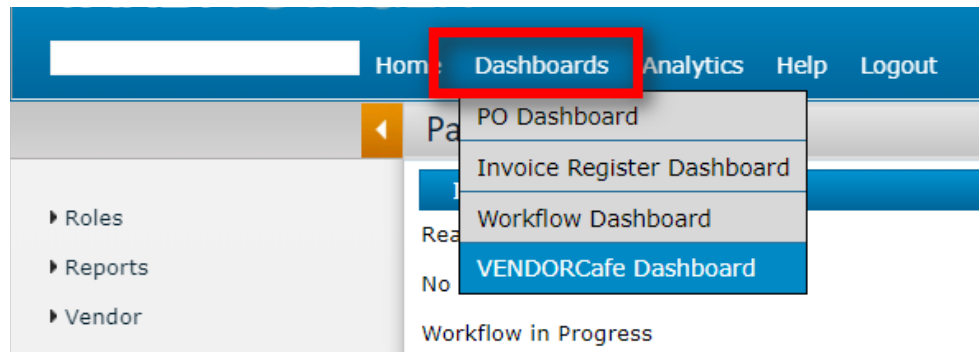
**Roles**

- Setup
- Administration
- Analytics
- Reports
- 50059 Functions
- 50059 Tools
- TRACS

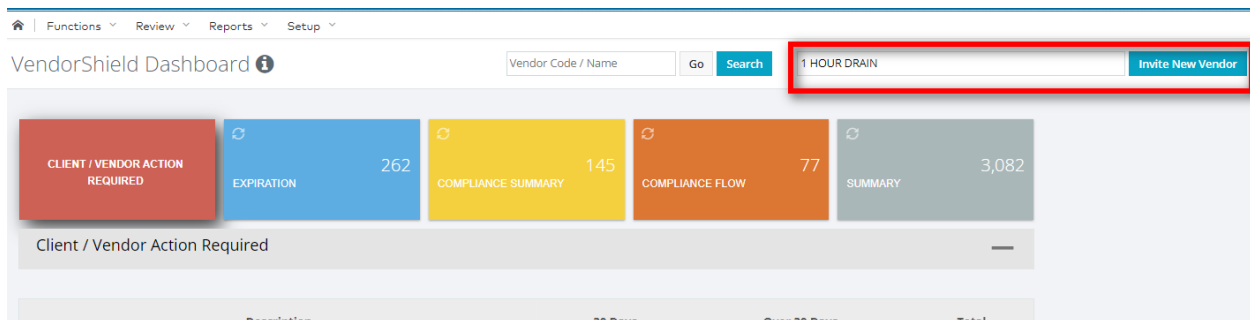
**Resident Activity**

EAH_PROP_202D_7S	0
Maintenance	0
MMW 7s	0
<b>PAYAprv 7s</b>	<b>18</b>
Payment Processing Admin	0
Regional Manager Dashboard	0
Scheduled Lease Renewals	0

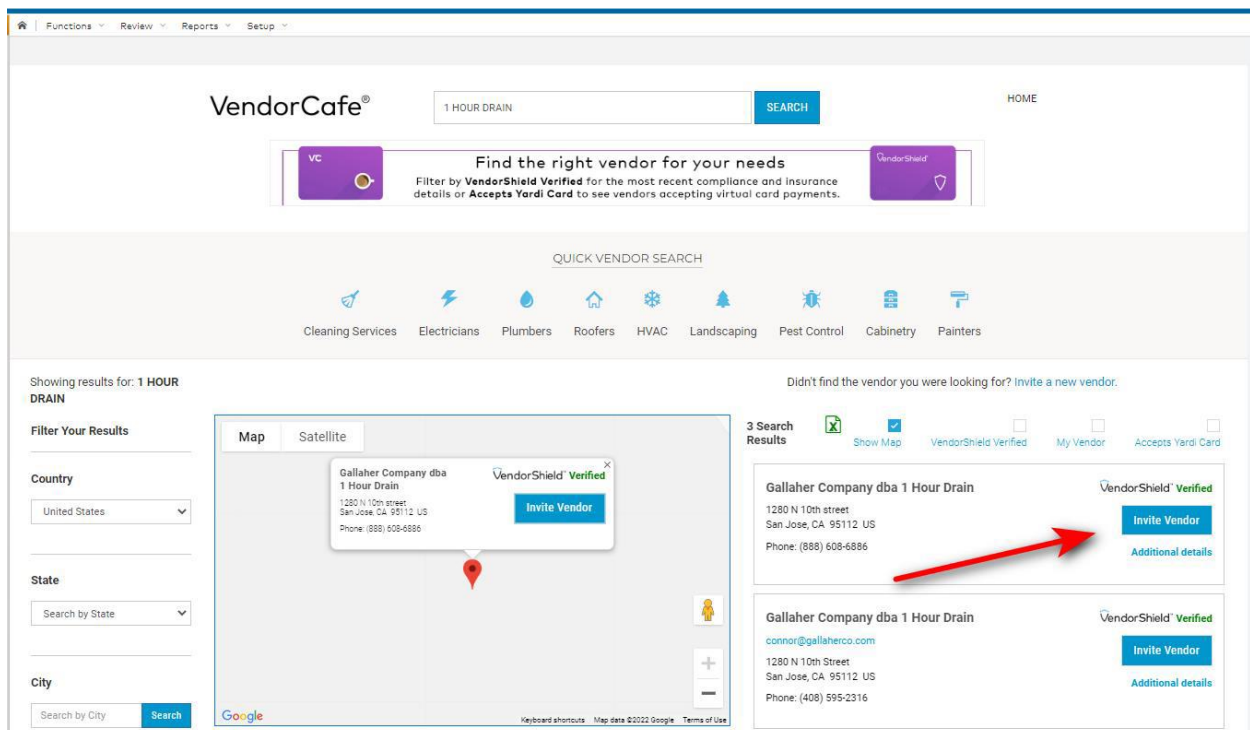
Step 2) From the top-menu, click on **Dashboards → VendorCafé Dashboard**.



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



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.



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


VC


**Find the right vendor for your needs**


Filter by **VendorShield Verified** for the most recent compliance and insurance details or **Accepts Yardi Card** to see vendors accepting virtual card payments.


VendorShield


QUICK VENDOR SEARCH


-   
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	<input type="text"/>
Vendor Code	<input type="text"/>
Name	<input style="background-color: #e0f7fa;" type="text"/>
Email To	<input style="background-color: #e0f7fa;" type="text"/>
Client Comments	<div style="border: 1px solid #ccc; height: 40px;"></div>
Internal Cc for Compliance Status	<div style="border: 1px solid #ccc; height: 30px;"></div>
Payment Method	<div style="border: 1px solid #ccc; background-color: #e0f7fa; padding: 2px;">Check ▼</div>
Vendor Agreement	<div style="border: 1px solid #ccc; background-color: #e0f7fa; padding: 2px;">Required ▼</div>
Send to VendorShield	<div style="border: 1px solid #ccc; background-color: #e0f7fa; padding: 2px;">Yes</div>
Compliance Policy	<div style="border: 1px solid #ccc; background-color: #e0f7fa; height: 20px;"></div>
Status	<div style="border: 1px solid #ccc; background-color: #e0f7fa; height: 20px;"></div>
Invited By	<div style="border: 1px solid #ccc; background-color: #e0f7fa; height: 20px;"></div>
	<div style="background-color: #00bcd4; color: white; padding: 5px; text-align: center; width: 100px; float: left;">Save</div>

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

Save Invite Vendor

Category Properties Compliance Setup

Category  Search

1 2 3 (139 Record(s) found)

Select	Name	Category Code	Send to VendorShield for Compliance
<input checked="" type="checkbox"/>	CA / HI - Standard - Electrical	CA - Standard Risk	Yes

Select	Property Code	Property Name	Address	City	State	Zip
<input type="checkbox"/>	1489old	4507 Main St EAH LLC - OLD	Los Angeles	Los Angeles	CA	90037
<input type="checkbox"/>	1366	Avenida Terrace L.P.	245 South Avenue #4	Los Angeles	CA	90042
<input type="checkbox"/>	1370	Casa Rampart, L.P.	401, 512 So. Rampart Blvd.	Los Angeles	CA	90057
<input type="checkbox"/>	1372	Hojas de Plata, LP	1515 N. Orange Ave.	Los Angeles	CA	91744
<input type="checkbox"/>	1489	Marcel EAH LLC	1041-49 N. Marcel Avenue	Los Angeles	CA	90046
<input type="checkbox"/>	1376	Parkview on the Park Senior Apartments	622-628 South Alvarado St.	Los Angeles	CA	90057
<input type="checkbox"/>	1388	Villas at Gower	1725 N Gower St.	Los Angeles	CA	91343
<input type="checkbox"/>	1390	Willis Avenue	14731 Rayen St.	Los Angeles	CA	91402
<input type="checkbox"/>	1362	1103 Lincoln	1103 Lincoln Avenue	Marin	CA	94901
<input type="checkbox"/>	1469	4507 Main St EAH LP	Los Angeles	Los Angeles	CA	90037
<input type="checkbox"/>	1402	625 Del Ganado	625 Del Ganado	Marin	CA	94903
<input type="checkbox"/>	1295	Arbor Court	4830 E. Laurel Avenue	Fresno	CA	93727
<input type="checkbox"/>	1292	Archway Commons	1101 Carver Rd.	Stanislaus	CA	95350
<input type="checkbox"/>	1468	Archway EAH II LP	1101 Carver Road	Stanislaus	CA	95350

## Regional Property Supervisor - Reviewing a New Vendor Invitation

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

Home | Functions | **Review** | Reports | Setup

**Review Invite Vendor**

Review Email Templates

Invite Vendor

Company: EAH15029

Vendor Code:

Vendor Company Name:

Email:

Status:

Remittance Vendor: 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
<input type="checkbox"/>	<a href="#">Re-Invite</a>	AIRTECH133359	AIRTECH SERVICE	cdudek@airtech.com	CA / HI - Standard - HVAC	0%	JANET GUSMAN		No
<input type="checkbox"/>	<a href="#">Re-Invite</a>	ALLSEA136257	ALL SEASONS ROOFING SERVICES	Virgie@allseasonsroof.com	CA / HI - PL - Roofing	0%	KATIE MILLER		No

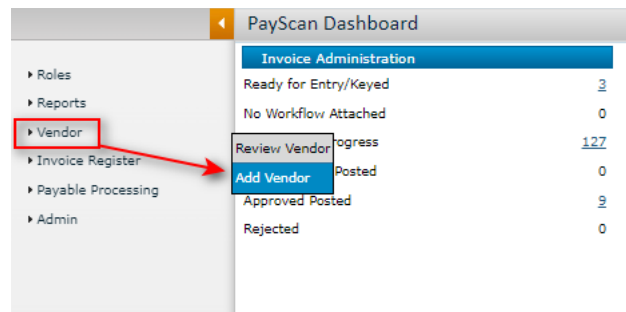
## Adding Additional Properties to a Vendors Property List

Please submit a ticket to [UDG-REMAPAdmin@eahhousing.org](mailto:UDG-REMAPAdmin@eahhousing.org) with the vendors name, vcode, and properties you would like to have added.

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

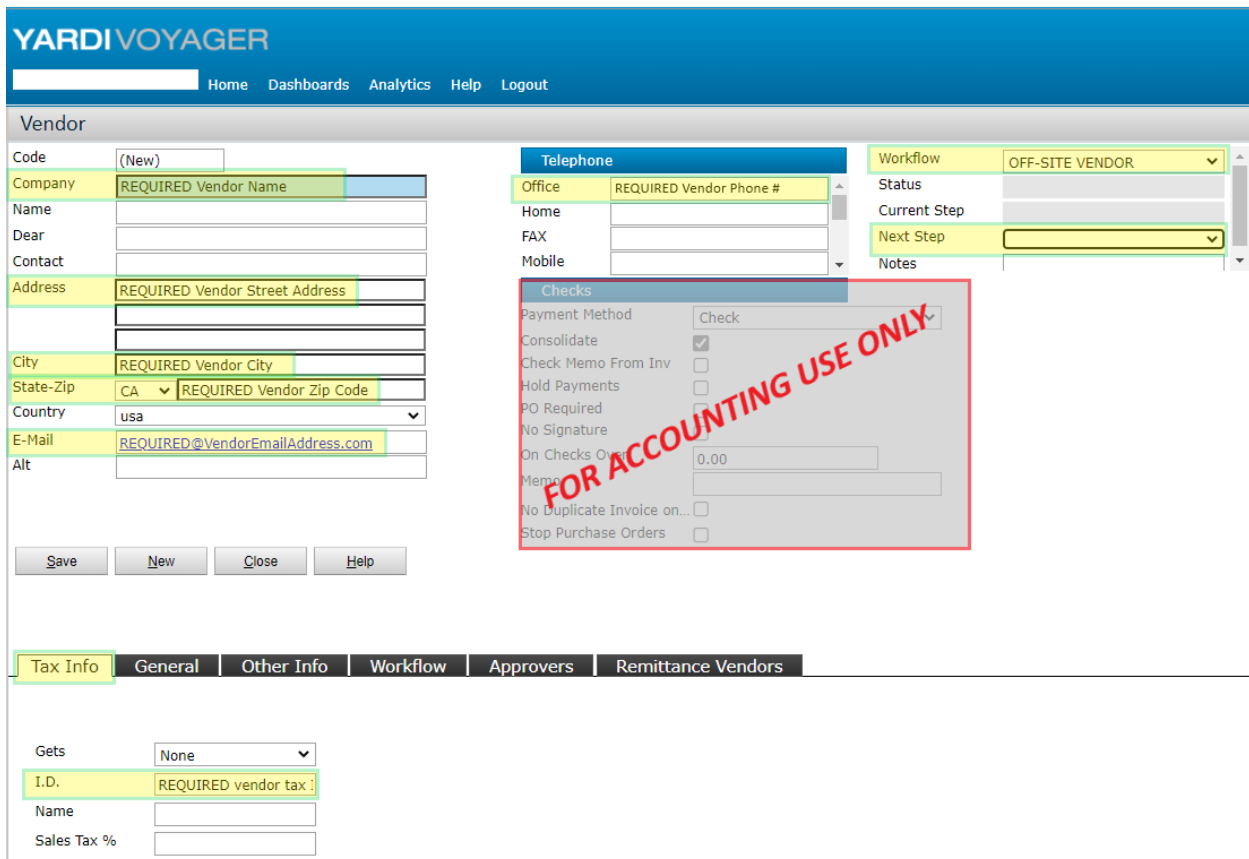
Step 1) For Property Managers, navigate to the **PayProp 7s** Role. For Reginal Property Supervisors, navigate to **PayAprv 7s**.

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



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.*



The screenshot shows the 'YARDI VOYAGER' Vendor form. The 'Vendor' tab is active. The form contains several sections with required fields highlighted in yellow:

- Code:** (New)
- Company:** REQUIRED Vendor Name
- Name:**
- Dear:**
- Contact:**
- Address:** REQUIRED Vendor Street Address
- City:** REQUIRED Vendor City
- State-Zip:** CA REQUIRED Vendor Zip Code
- Country:** usa
- E-Mail:** REQUIRED@VendorEmailAddress.com
- Alt:**

On the right side, the 'Workflow' tab is set to 'OFF-SITE VENDOR'. Below it, the 'Checks' section is highlighted with a red box and contains a red diagonal watermark that reads 'FOR ACCOUNTING USE ONLY'. The 'Checks' section includes fields for Payment Method, Consolidate, Check Memo From Inv, Hold Payments, PO Required, No Signature, On Checks Over, Memo, No Duplicate Invoice on..., and Stop Purchase Orders.

At the bottom, the 'Tax Info' tab is active, showing fields for Gets (None), I.D. (REQUIRED vendor tax), Name, and 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
Gets	None				
I.D.					
Name	EMPLOYEE				
Sales Tax %					

Step 5) Attach any necessary documentation by clicking on Data → 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 → Choose File → Select the File you want to upload → Open.

## Attachments

Available Attachments for Vendor: REQUIRED Vendor Name (v00000123)

Sort By:  Order:

Type	Description	Date	Attachment	Secure	Show on Portal	Detach
------	-------------	------	------------	--------	----------------	--------

### File Attachment Upload

Select up to 3 files to upload and attach

No file chosen

No file chosen

No file chosen

Open

← → ↕ ⬇ This PC > Downloads ↻

Search Downloads

Organize New folder

	Name	Date modified	Type
Last week (1)			
	Vendor Attachment	7/19/2022 9:31 AM	Adobe Acro

File name: Vendor Attachment All files

Step 7) Next, push the vendor record to the next step for approval by clicking on Edit → Select Next Step → 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	<input type="text"/>
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.

Home Shop Now Dashboards Analytics Help Logout

### PayScan Dashboard

Invoice Administration	Payable Administration	Thursday, August 18, 2022
Ready for Entry/Keyed 3	Unposted Batches 0	Property <input type="text"/> Go
No Workflow Attached 0	Pending Payment Approval 0	Vendor <input type="text"/>
Workflow in Progress 142	Approved and Unpaid/Partially Paid 2	Date Range <input type="text"/> <input type="text"/>
Approved not Posted 0		<a href="#">Add Vendor</a> <a href="#">PO Analytics</a>
Approved Posted 2		<a href="#">Add PO</a> <a href="#">AP Analytics</a>
Rejected 0		<a href="#">Add Invoice</a> <a href="#">Workflow Dashboard</a>
		<a href="#">Add Payable</a>

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.

### Workflow Manager Dashboard

Object Type: Vendor Show: Vendor Only Show for All Users: ☒

Workflow Status: InProgress Preferred Approver: ☐

Workflow Step: 2 REGIONAL PROPERTY SUPERVISOR Order By: Current Step Order: Ascending

Workflow Date Range:

User:

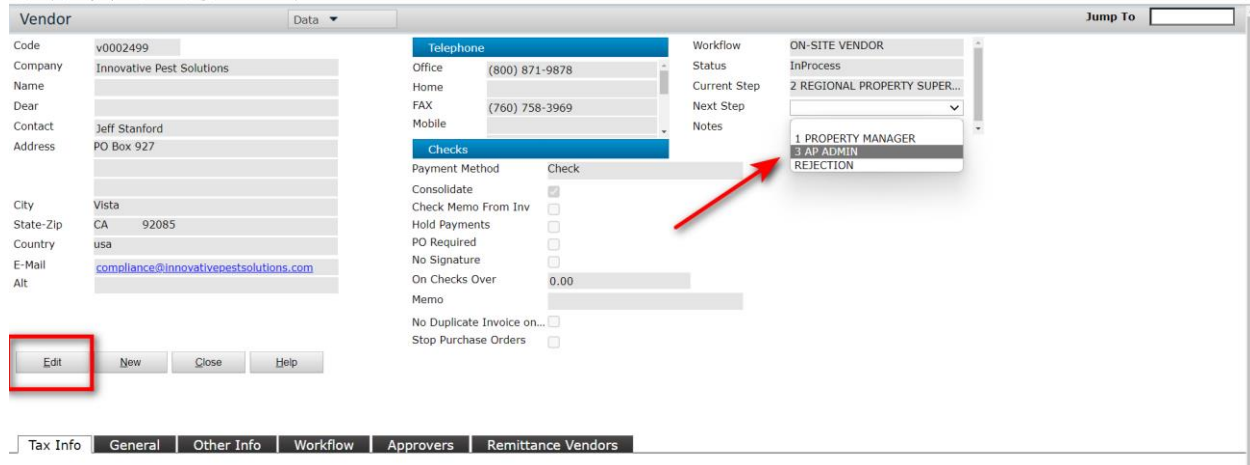
Display Post Clear

#### Workflows

Next Step:  Set Selected Set All Clear Selected Clear All

Current Step	Vendor	Next Steps	Approval Notes	Prev. Step Notes	Vendor Name
ON-SITE VENDOR-2 REGIONAL PROPERTY SUPERVISOR	<a href="#">v0002499</a>	<input type="text"/>	<input type="text"/>		Innovative Pest Solutions PC

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



**Vendor** [Data ▼] Jump To [ ]

Code	v0002499	<b>Telephone</b>	Office	(800) 871-9878	Workflow	ON-SITE VENDOR
Company Name	Innovative Pest Solutions		Home		Status	InProcess
Dear			FAX	(760) 758-3969	Current Step	2 REGIONAL PROPERTY SUPER...
Contact	Jeff Stanford		Mobile		Next Step	[ ]
Address	PO Box 927	<b>Checks</b>			Notes	1 PROPERTY MANAGER 3 AP ADMIN REJECTION
		Payment Method	Check			
City	Vista	Consolidate	<input type="checkbox"/>			
State/Zip	CA 92085	Check Memo From Inv	<input type="checkbox"/>			
Country	usa	Hold Payments	<input type="checkbox"/>			
E-Mail	compliance@innovativepestsolutions.com	PO Required	<input type="checkbox"/>			
Alt		No Signature	<input type="checkbox"/>			
		On Checks Over	0.00			
		Memo				
		No Duplicate Invoice on...	<input type="checkbox"/>			
		Stop Purchase Orders	<input type="checkbox"/>			

[Edit] [New] [Close] [Help]

Tax Info | General | Other Info | Workflow | Approvers | Remittance Vendors

## VendorShield Customer Support

Vendors may contact VendorShield Customer Support at:

### Compliance and Certification Questions

- Email: [VendorShieldSupport@yardi.com](mailto:VendorShieldSupport@yardi.com)
- Phone: 1-877-890-8627

### Registration/Email Questions

- Email: [VendorCafe\\_Support@yardi.com](mailto:VendorCafe_Support@yardi.com)
- Phone: 1-877-890-8627

## Internal VendorShield Support

EAH team members may send VendorShield escalation requests to:

- [UDG-VSSupport@eahhousing.org](mailto:UDG-VSSupport@eahhousing.org)

For general VendorShield questions, please submit a ticket to:

- [Bizsystemssupport@eahhousing.org](mailto:Bizsystemssupport@eahhousing.org)