

VendorShield Process

Revised: 01/11/2023

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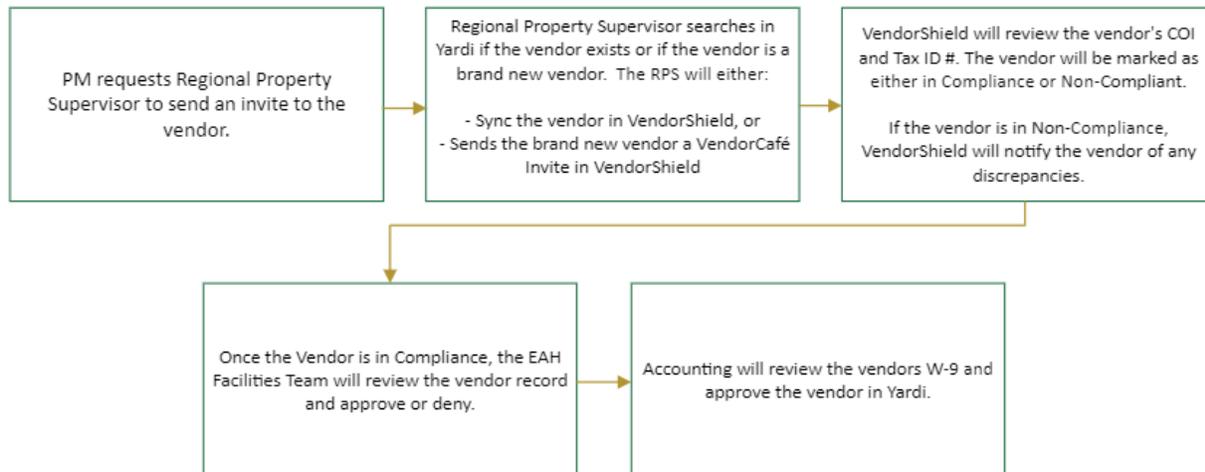
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Property Managers – Inviting Brand New Vendors

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

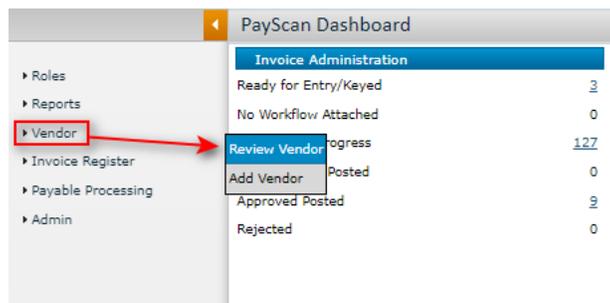
- 1) Regional Property Supervisor reviews vendor compliance through VendorCafé
- 2) If Vendor is in compliance and approved, RPS sends email to AP Admin (Yennsen, Jack and Alex) at UDG-REMAPAdmin@eahhousing.org.
- 3) AP Admin (Yennsen, Jack and Alex) add property to Vendor Property List and notify site 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 | New Image Reglazing, P.O. Box 1622 El Segundo CA 90245

Last Name:

Address..Zip:

Telephone Nos.:

Tax Id:

Fed Name:

Workers Comp Exp.: -to-

Tax % > =:

Status:

Notes:

Remittance Vendor:

Display Rows:

Submit Clear Help

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
 Company: JNJ Hauling
 Name: [Redacted]
 Dear: [Redacted]
 Contact: [Redacted]
 Address: [Redacted]
 City: [Redacted]
 State-Zip: [Redacted]
 Country: [Redacted]
 E-Mail: [Redacted]
 Alt: [Redacted]

Telephone
 Office: (310) 951-8189
 Home: (310) 307-1708
 Cell: (310) 324-8339

Checks
 Payment Method: Check
 Consolidate:
 Check Memo From Inv:
 Hold Payments:
 PO Required:
 No Signature:
 On Checks Over: 0.00
 Memo: [Redacted]
 No Duplicate Invoice on...:
 Stop Purchase Orders:

Workflow
 Status: [Redacted]
 Current Step: [Redacted]
 Next Step: [Redacted]
 Notes: [Redacted]

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

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

Status [Approved] | URL: [Redacted]
 Employee: | Notes: [Redacted]
 Preferred Supplier:
 Region: [Redacted]
 Expense Type: [Redacted]
 Default Display Type: [Redacted]
 Usual Account: [Redacted]
 Is Credit Card Vendor:
 Retention Percent: [Redacted]

Discount/Payment Terms
 Percent: [Redacted]
 Day: 0
 Days from Invoice: [Redacted]
 Day of the Month: [Redacted]
 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

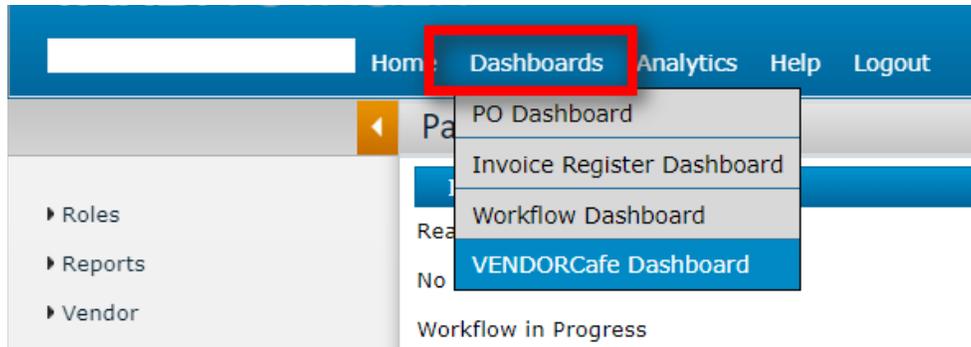
Roles (highlighted with red box and arrow)

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

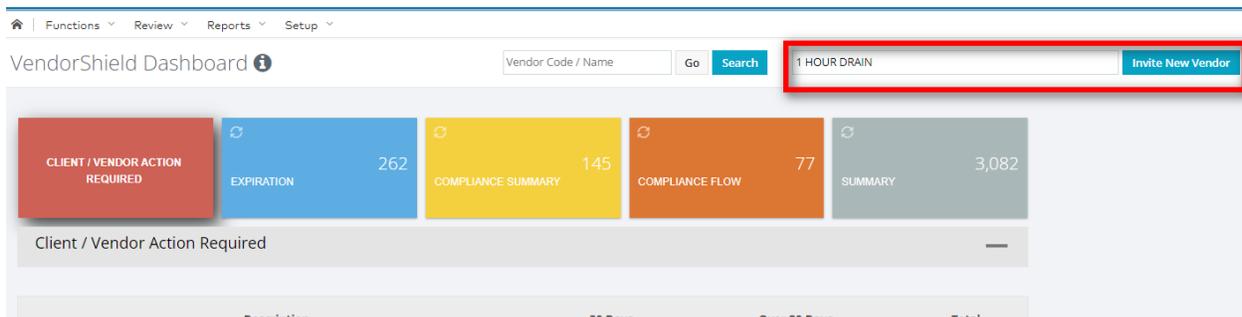
Resident Activity

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

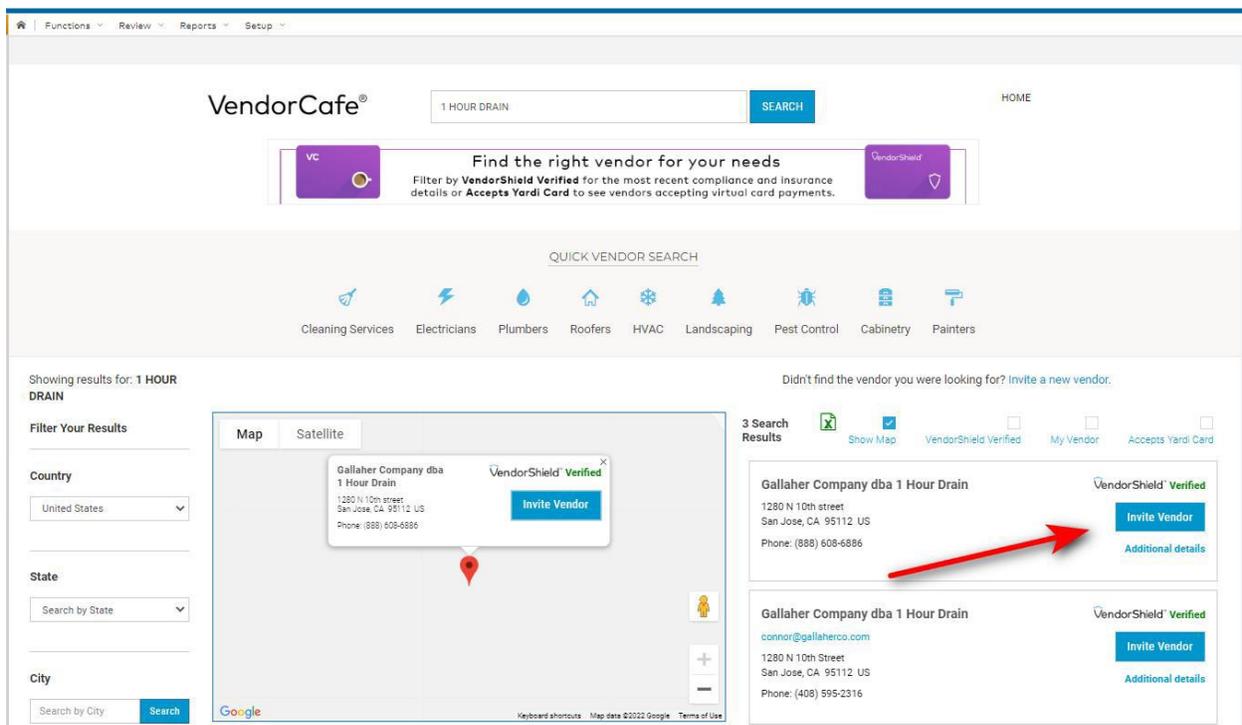
Step 2) From the top-menu, click on **Dashboards** → **VendorCafé Dashboard**.



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**.

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.

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 type="text"/>
Email To	<input type="text"/>
Client Comments	<input type="text"/>
Internal Cc for Compliance Status	<input type="text"/>
Payment Method	<input type="text" value="Check"/>
Vendor Agreement	<input type="text" value="Required"/>
Send to VendorShield	<input type="text" value="Yes"/>
Compliance Policy	<input type="text"/>
Status	<input type="text"/>
Invited By	<input type="text"/>
	<input type="button" value="Save"/>

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"/>	1469old	4507 Main St EAH LLC - OLD	Los Angeles	Los Angeles	CA	90037
<input type="checkbox"/>	1366	Avenida Terrace L.P.	245 South Avenue 94 Los Angeles	Los Angeles	CA	90042
<input type="checkbox"/>	1370	Casa Rampart L.P	401, 512 So. Rampart Blvd. Los Angeles	Los Angeles	CA	90057
<input type="checkbox"/>	1372	Hojas de Plata, LP	1515 N. Orange Ave. Los Angeles	La Puente	CA	91744
<input type="checkbox"/>	1489	Martel EAH LLC	1041-49 N. Martel Avenue, Los Angeles	West Hollywood	CA	90046
<input type="checkbox"/>	1376	Parkview on the Park Senior Apartments	623-628 South Alvarado St. Los Angeles	Los Angeles	CA	90057
<input type="checkbox"/>	1388	Villas at Gover	1726 N Gover St. Los Angeles	Los Angeles	CA	91343
<input type="checkbox"/>	1390	Willis Avenue	14731 Rayen St. Los Angeles	Los Angeles	CA	91402
<input type="checkbox"/>	1362	1103 Lincoln	1103 Lincoln Avenue, Marin	San Rafael	CA	94901
<input type="checkbox"/>	1469	4507 Main St EAH LP	Los Angeles	Los Angeles	CA	90037
<input type="checkbox"/>	1402	626 Del Ganado	626 Del Ganado, Marin	San Rafael	CA	94903
<input type="checkbox"/>	1295	Arbor Court	4830 E. Laurel Avenue, Fresno	Fresno	CA	93727
<input type="checkbox"/>	1292	Archway Commons	1101 Carver Rd, Stanislaus	Modesto	CA	95350
<input type="checkbox"/>	1468	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** → **Review Invite Vendor**.

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

Invite Vendor

Review Invite Vendor

Review Email Templates

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"/>	Re-Invite	AIRTEC133359	AIRTECH SERVICE	cdudek@airtech.com	CA / HI - Standard - HVAC	0%	JANET GUSMAN		No
<input type="checkbox"/>	Re-Invite	ALLSEA136257	ALL SEASONS ROOFING SERVICES	Virgie@allseasonsroof.com	CA / HI - PL - Roofing	0%	KATIE MILLER		No

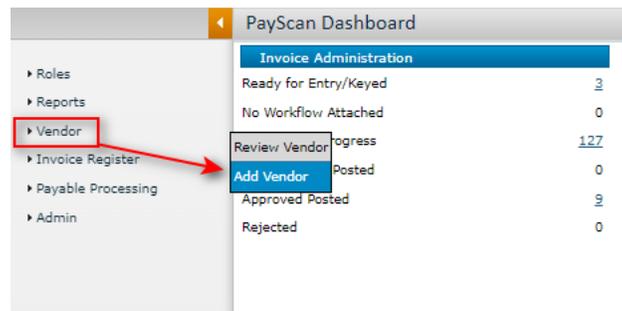
Adding Additional Properties to a Vendors Property List

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

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

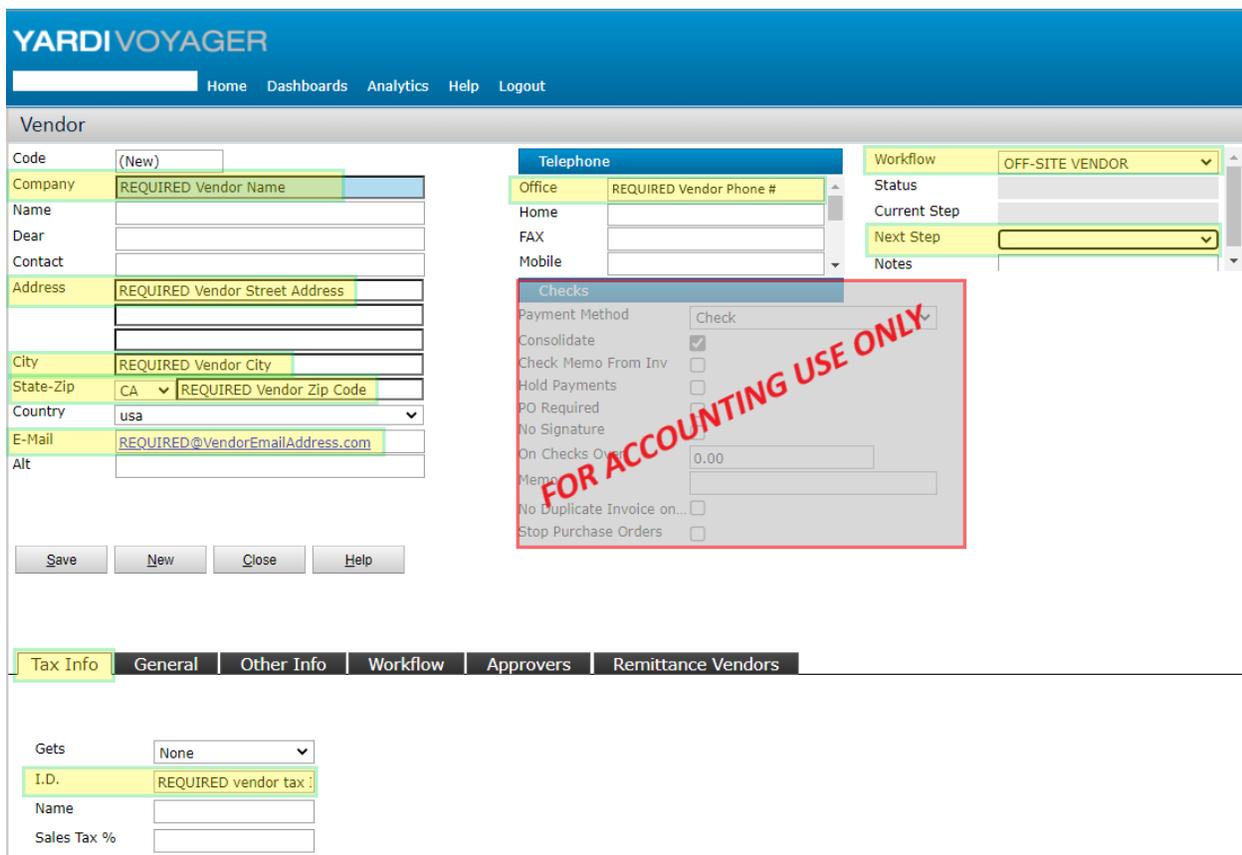
Step 1) For Property Managers, navigate to the **PayProp 7s** Role. For Reginal Property Supervisors, navigate to **PayAprv 7s**.

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.*



YARDI VOYAGER

Home Dashboards Analytics Help Logout

Vendor

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

Telephone

Office **REQUIRED Vendor Phone #**

Home

FAX

Mobile

Workflow **OFF-SITE VENDOR**

Status

Current Step

Next Step

Notes

FOR ACCOUNTING USE ONLY

Checks

Payment Method Check

Consolidate

Check Memo From Inv

Hold Payments

PO Required

No Signature

On Checks Only 0.00

Memorandum

No Duplicate Invoice on...

Stop Purchase Orders

Save New Close Help

Tax Info General Other Info Workflow Approvers Remittance Vendors

Gets None

I.D. **REQUIRED vendor tax :**

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
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 Name	REQUIRED Vendor Name	Memo	EFT Setup (New)	VC - Producer Details	VC - UDFs
Dear		Contact	US Bank	VC - Insurance Details	WF Payment Manager
Contact		Email	rCash PAY	VC - Request History	Prop List
Address	REQUIRED Vendor Street Address	EFT Setup	VC - Compliance History	VC - EFT Request	
		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
------	-------------	------	------------	--------	----------------	--------

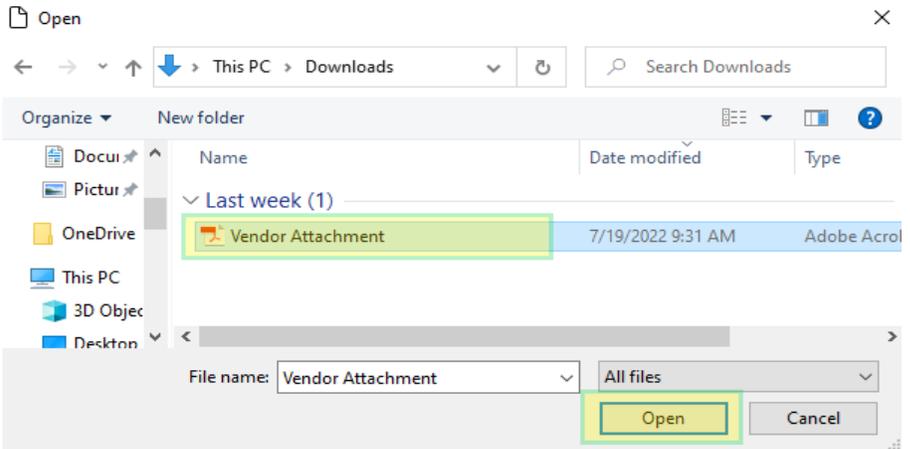
File Attachment Upload

Select up to 3 files to upload and attach to this record.

No file chosen

No file chosen

No file chosen



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" value="3 ACCT MANAGER APPROVAL"/>
Notes	<input type="text" value="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		Add Vendor PO Analytics
Approved Posted 2		Add PO AP Analytics
Rejected 0		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.

Workflow Manager Dashboard

Object Type: Vendor (dropdown) Show: Vendor Only (dropdown) Show for All Users:

Workflow: (dropdown) Preferred Approver:

Workflow Status: InProgress (dropdown) Order By: Current Step (dropdown)

Workflow Step: 2 REGIONAL PROPERTY SUPERVISOR (dropdown) Order: Ascending (dropdown)

Workflow Date Range:

User:

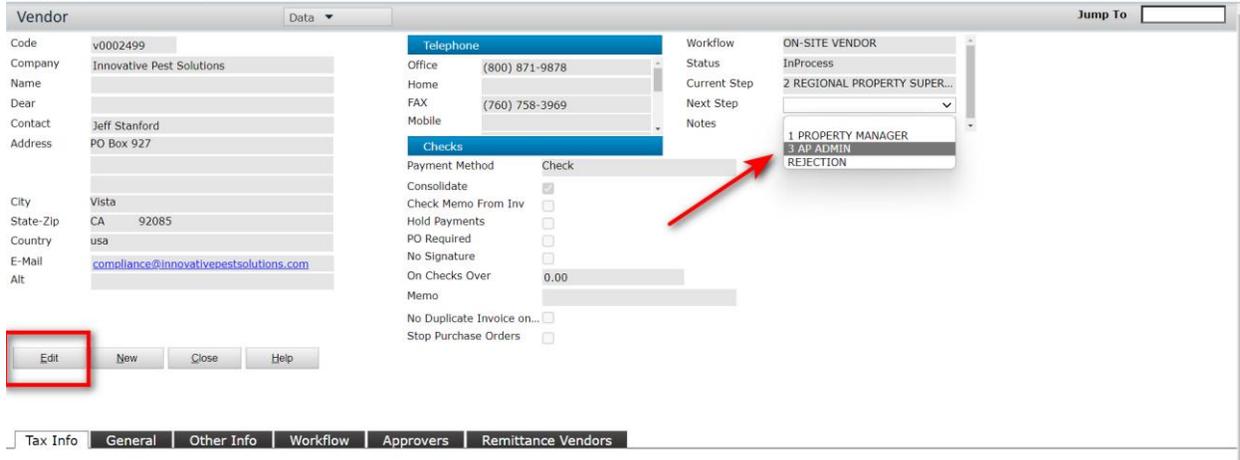
Display Post Clear

Workflows

Next Step: (dropdown) 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	v0002499	(dropdown)	<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: v0002499
Company: Innovative Pest Solutions
Contact: Jeff Stanford
Address: PO Box 927
City: Vista
State-Zip: CA 92085
Country: usa
E-Mail: compliance@innovativepestsolutions.com

Telephone:
Office: (800) 871-9878
Home:
FAX: (760) 758-3969
Mobile:

Checks:
Payment Method: Check
Consolidate:
Check Memo From Inv:
Hold Payments:
PO Required:
No Signature:
On Checks Over: 0.00
Memo:

Workflow: ON-SITE VENDOR
Status: InProcess
Current Step: 2 REGIONAL PROPERTY SUPER...
Next Step:
Notes:
1 PROPERTY MANAGER
3 AP ADMIN
REJECTION

Buttons: Edit, New, Close, Help

Tabs: 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
- 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:

- UDG-VSSupport@eahhousing.org

For general VendorShield questions, please submit a ticket to:

- Bizsystemssupport@eahhousing.org