

VENDOR ACCESS: VENDOR USER GUIDE

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Getting to Know the VendorAccess Dashboard

The VendorAccess Dashboard provides an easy place to navigate your company's interaction with your customers using Entrata. This article helps you navigate this page and the actions available.

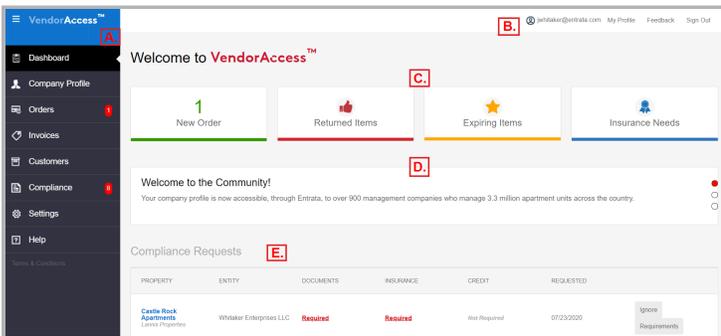
To get to the VendorAccess Dashboard, go to vendoraccess.com and log in to your account.

VendorAccess Dashboard

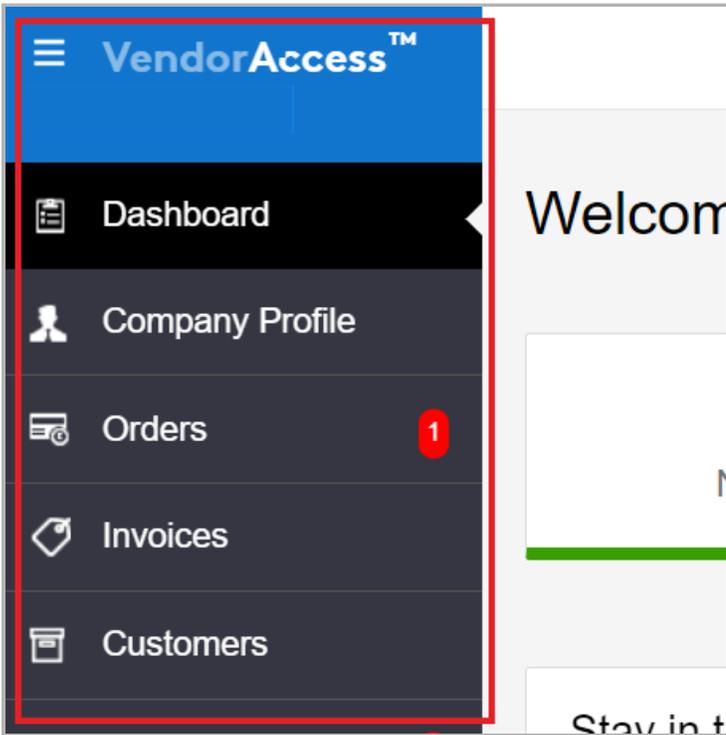
In this article:

- [A. Sidebar Navigation](#)
- [B. Profile Bar](#)
- [C. Quick Links](#)
- [D. VendorAccess News](#)
- [E. Compliance Requests](#)

Associated Products:
VendorAccess™
Entrata® Accounting™



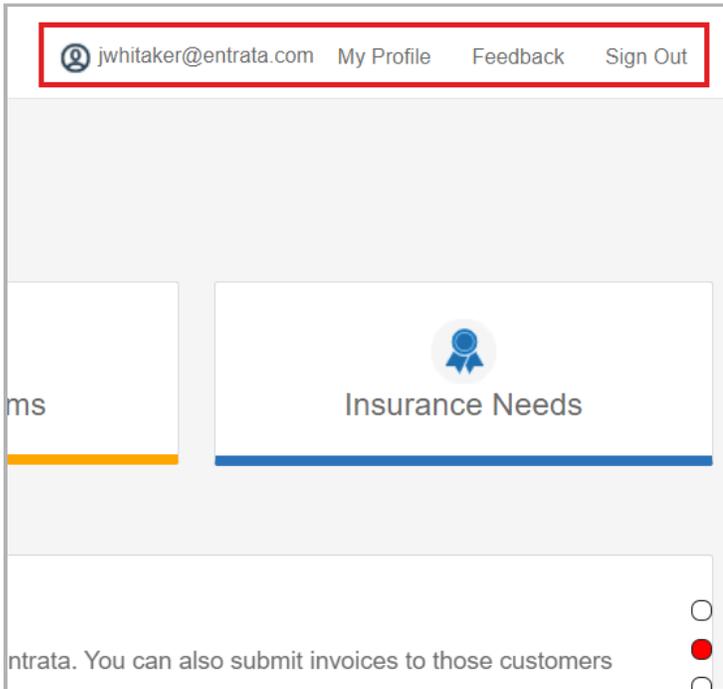
A. Sidebar Navigation



The sidebar navigation contains all of the tabs assigned and available to your user profile. Red notification bubbles display on tabs with actions needed, and the navigation can be collapsed or expanded by clicking the menu icon in-line with the VendorAccess logo.

[For more information on using these tabs to build out your VendorAccess account, see the article **Building a VendorAccess Account** .](#)

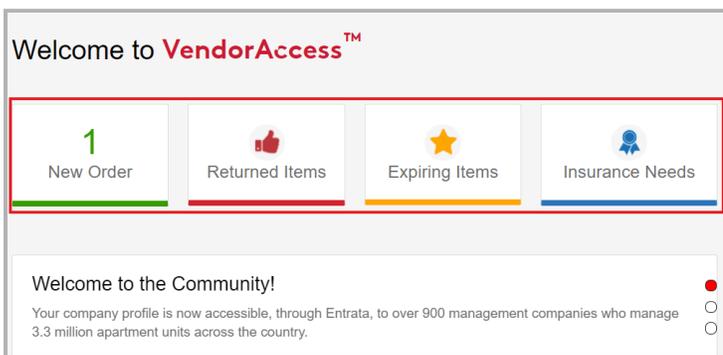
B. Profile Bar



The bar at the top of the dashboard contains your user profile, a link for feedback to the Entrata VendorAccess team, and the option to sign out.

[For more information on user profiles and group permissions, see the article **Building a VendorAccess Account** .](#)

C. Quick Links

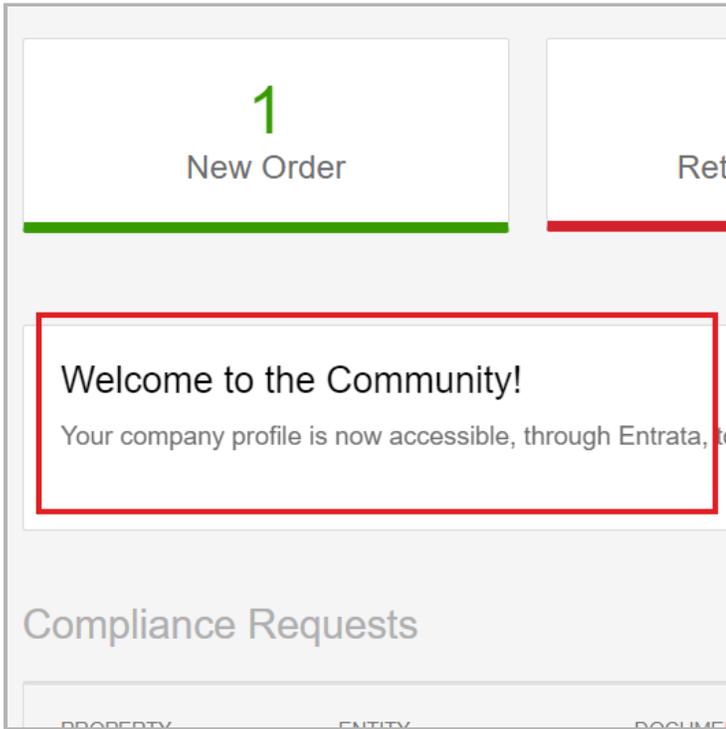


Prominent on the dashboard are four quick links to the primary VendorAccess tasks: new orders, returned items, expiring items, and insurance needs.

[For more information on fulfilling insurance needs as well as purchasing, see the article **Fulfilling VendorAccess Compliance**](#)

Requests and Fulfilling Purchases in VendorAccess for Entrata Customers .

D. VendorAccess News



The screenshot shows a dashboard interface. At the top left, there is a notification box with a large green number '1' and the text 'New Order'. To its right, another notification box is partially visible with the text 'Ret'. Below these, a red-bordered box highlights a message that reads 'Welcome to the Community!' followed by 'Your company profile is now accessible, through Entrata, to'. Below this message, the text 'Compliance Requests' is visible. At the bottom of the screenshot, there are three columns of text: 'PROPERTY', 'ENTITY', and 'DOCUMENT'.

This area displays important banner messages from VendorAccess.

E. Compliance Requests

Now Available!

You now have the ability to receive Purchase Orders electronically directly from VendorAccess!

Compliance Requests

PROPERTY	ENTITY	DOCUMENT
Castle Rock Apartments <i>Lannis Properties</i>	Whitaker Enterprises LLC	Required
Sandstone Mall		

As your customers add compliance rulesets for their properties in Entrata, those requests come to you in this section where you can upload supporting documents.

 For more information on completing your customers' compliance requests, see the article [Fulfilling VendorAccess Compliance Requests](#).

Building a VendorAccess Account

In this article:

- [Adding a Legal Entity](#)
- [Adding a Location](#)
- [Adding an Account](#)
- [Adding Employees and Groups](#)
- [Recommended Next Steps](#)

After creating a VendorAccess account for your company, the account needs to be built out so it can properly interact with your customers using Entrata. This includes adding the proper legal entity or entities, adding your different locations that customers use, adding customer account details, and adding your employees' to VendorAccess so they can help serve your customers. Once these are added, they can be synced with your profile housed in your customer's Entrata environment so their record of your information always stays up-to-date.

Adding a Legal Entity

When initially creating your VendorAccess account, you added your primary legal entity information. If you have additional legal entities for different locations, you can add them to your Company Profile as well.

1. Log in to your VendorAccess account.
2. Navigate to the Company Profile sidetab, and then to the Legal Entities tab.
3. Click  **Add Legal Entity**. The Add Legal Entity window opens.
4. Enter the **Name on Tax Return** for the entity.
5. Enter the **Tax ID Number**.
6. Choose the **Entity Type** from the drop-down menu.
7. To upload the entity's **W-9 Document**, click **Choose File** to locate and upload a copy of the W-9 from your computer.
8. Once finished, click **Add** to add the legal entity to your Company Profile.

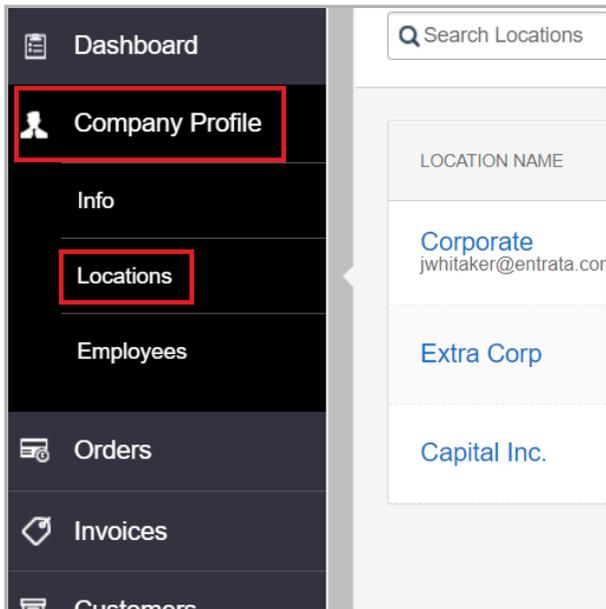
 Once you've added a legal entity, your customer can sync your VendorAccess account to their record of you in Entrata and allows locations, account, POs, and invoices to sync between you as well.

Associated Products:
VendorAccess™
Entrata® Accounting™

Adding a Location

You can add location information for the entity or entities your customers interact with, including the preferred payment type and remittance.

1. Log in to your VendorAccess account.
2. Navigate to the Company Profile sidetab and then to the Locations sidetab.



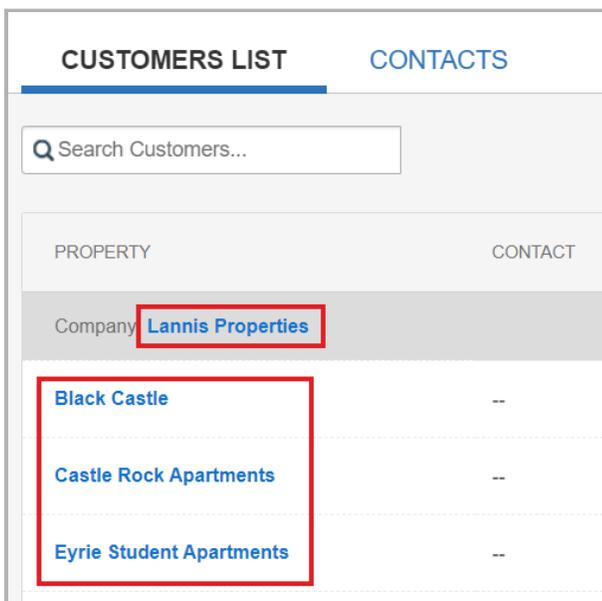
3. Click **+** Add New Location. The Add New Location window opens.
4. Enter a **Location Name**.
5. Choose a **Legal Entity** from the drop-down menu. You can also add an entity from this window by clicking **+** Add in-line with the drop-down and complete the window that opens.
6. Enter an **Address and Phone** for the location.
7. Select a **Preferred Payment Type**, and enter a **Remittance Name**.
8. Choose the **Primary Point of Contact** for the location.
9. Once finished, click **Add**. The location is added to your Company Profile.

i Once you've added the location, your customer can pair that location with the location information they have entered into Entrata.

Adding a Customer Account

An important part of your VendorAccess account setup is your accounts with your customers. Your customer list comes from the companies and properties that have been associated to you in their Entrata environments.

1. Log in to your VendorAccess account.
2. Navigate to the Customers sidetab.
3. Click either the desired company name or a specific property name to open the Customer or Property Profile.



4. Navigate to the Accounts tab. The Add Account window opens.
5. Enter the **Account Number**.
6. If desired, enter an **Account Name**.
7. Choose a **Location** to associate to the account.
8. If desired, choose a **Default Property** to associate the account to.
9. If there's a punch-out catalog associated to the account, toggle **Account has a PunchOut Catalog** to **Yes**. Additional fields appear below.

Filling Out Punch-Out Catalog Fields

- a. Enter a **Catalog Identity**.

- b. Enter a **Catalog SharedSecret**.
- c. Enter a **Catalog URL**.
- d. Enter a **Catalog OrderRequest URL**.

10. Once finished with account details, click **Add**. The account is added to the Company or Property Profile.

i Once you've added their account, your customer can log in to Entrata to import and pair that account to your profile in their environment. Once it's paired, they can begin using it on POs they create for you.

Adding Employees and User Groups

1. Log in to your VendorAccess account.
2. Navigate to the Company Profile sidetab and then to the Employees sidetab.
3. Click **+** **Add Employee** to open the Add Employee window.
4. If the employee is an admin user, toggle **Make Admin User** to **Yes**.

i Admin users are able to access all areas of VendorAccess and perform actions that would usually require specific permissions for a normal user. You don't need to complete step 13 for an admin user.

5. If the individual is a **Business Owner/Principal**, then toggle to **Yes**.

i By indicating this individual is a business owner or principal employee, additional fields for the individual's information appear: **Middle Name**, **DOB** for the individual's date of birth, and **Current (Property) Address** to identify this individual for business credit checks.

6. Enter the **First Name** and **Last Name** of the employee.
7. Select the **Location(s)** where this employee works from the drop-

down menu. This option won't shown if the employee is marked as an admin user.

8. If desired, enter the employee's **Position**.
9. Enter the **Phone** number and, if desired or needed, the **Fax** numbers of the employee.
10. Enter the **Email** of the employee. This is their username for VendorAccess.
11. If for any reason you need to block the employee from logging into VendorAccess, toggle **Block VendorAccess Login** to **Yes**. The fields below disappear, and you can skip to step 14.
12. Enter a **Password** for the employee, or click the **Generate** button to have the system generate one for you. If you want the employee to change the password when they next log in to VendorAccess, toggle **Require password change on next login** to **Yes**.

 The password must be at least 8 characters in length. If you select **Generate**, the system creates a unique password with a combination of numbers, symbols, and letters that can help in protecting the newly created account's security. An email will be sent to the employee when the new user account has been created.

Requiring a password change when they next log in may be beneficial to a new user's first time logging in, to allow them to create a custom password that is unique and easy to remember for them.

13. To set the employee's VendorAccess assigned permissions, choose a **User Group** from the drop-down menu, or create a new set of user group permissions by clicking  **Add User Group** and use the box below to complete the Add User Group window that appears.

Adding a New User Group

- a. In the Add User Group window, enter a **Group Name**.
- b. Under the **Can Access?** column, use the toggles to enable each navigation tab the employee is allowed to access.

NAVIGATION TAB	CAN ACCESS?	OP
Dashboard	Public	
Company Profile	<input type="checkbox"/> No	
Orders	<input type="checkbox"/> No	
Invoices	<input type="checkbox"/> No	
Customers	<input type="checkbox"/> No	

- c. If the Orders, Invoices, or Compliance tabs are enabled, verify and adjust the options that appear next to the toggle as needed.
- d. Once satisfied, click **Add Group**. The group is added and immediately applied to the employee being added. It can be chosen when adding future employees as well.

- 14. If the employee goes to perform work on-site at customers' properties, toggle **On-site Employee** to **Yes**.
- 15. If the employee is a contact for customers, toggle **Contact Person for Customers** to **Yes** and select the customer(s) they are a **Primary Contact For** from the drop-down menu.
- 16. Click **Add** to save the added employee.

Recommended Next Steps

Fulfill Compliance Requirements

Your customers have likely created compliance rulesets in Entrata and require documentation from your company to fulfill these rulesets.

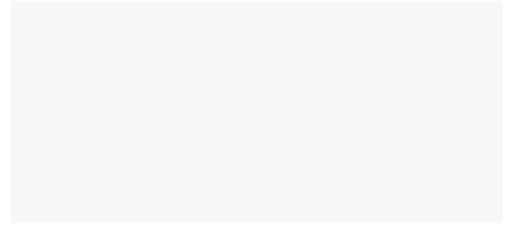
For help, see the article [Fulfilling VendorAccess Compliance Requests](#).

Process POs

As your customer creates POs in Entrata, they are submitted through your

synced accounts and can be managed through VendorAccess.

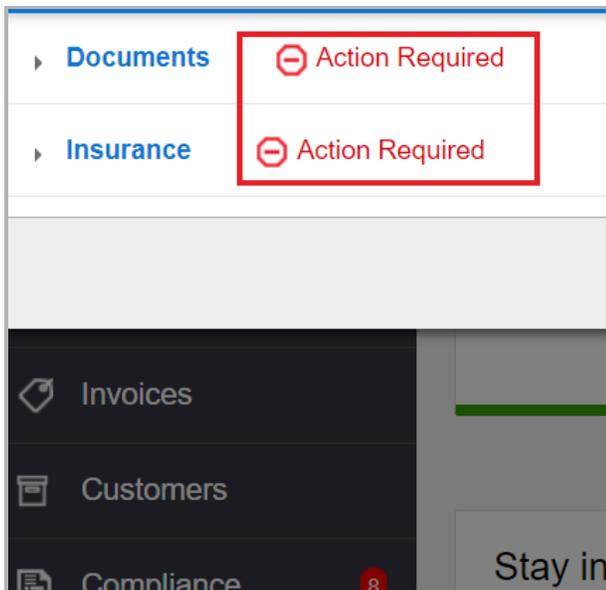
 For help, see the article **Fulfilling Purchases in VendorAccess for Entrata Customers** .



Fulfilling VendorAccess Compliance Requests

Your customers who use Entrata have the ability to create compliance rulesets for their vendors to ensure the property can keep track of necessary documentation. Once they've associated that ruleset to your Company Profile, you can view the requirements and upload the supporting documentation.

1. Log in to your VendorAccess account.
2. Scroll down to the Compliance Requests section, and find the desired property.
3. Click **Requirements** in-line with the property. The Customer Requirements screen opens and the requested information displays.
4. Depending on the requirements, click each line with  **Action Required** to expand the section and complete it.



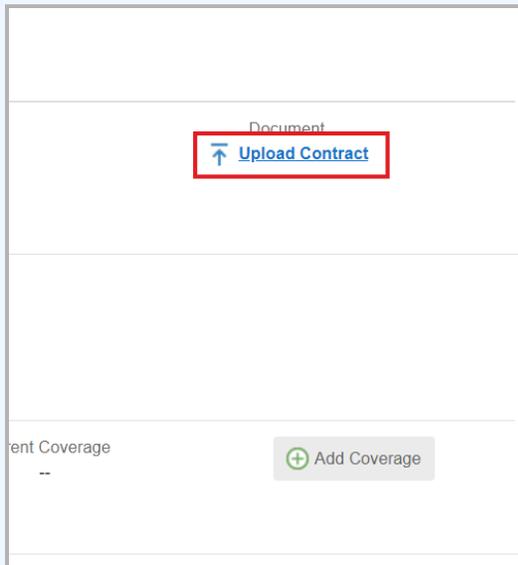
Associated Products:
VendorAccess™
Entrata® Accounting™

Completing Actions Required

Uploading Company Documents

- a. Click an option under the Document column. Based on the document needing to be uploaded, the button can appear as one of these options:
 -  Upload Miscellaneous Document
 -  Upload W-9

-  Upload Business License
-  Upload Contract



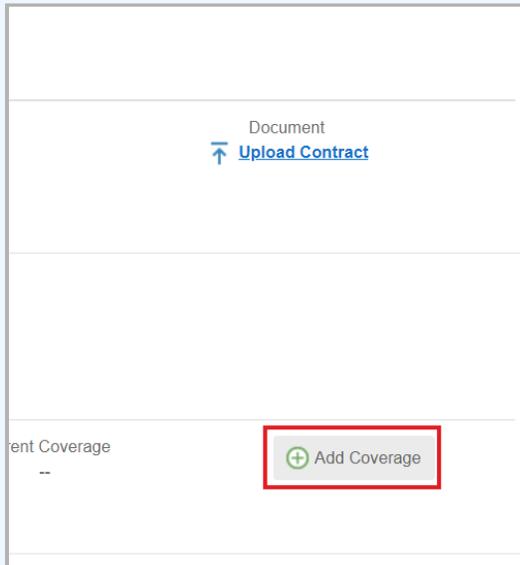
- In the Document window that appears, click **Choose File**, then locate the file you wish to upload from your computer.
- Once the document is selected, adjust or make selections for the following drop-downs as needed:
 - **Type**
 - **Synced Vendor**
 - **Associated Legal Entity(s)**
 - **Associate to all properties**
 - **Expires**
- Once satisfied with your document, click **Add** when finished. You return to the Customer Requirements screen.

 The requirement continues to show  **Action Required** until the customer has logged in to Entrata, reviewed the documentation, and accepted it.

- Repeat steps a–d for each type of document needed.

Uploading Insurance Information

- Click  **Add Coverage** in-line with the insurance requirement. The Add Insurance Coverage screen opens.



- b. Under the Certificate of Insurance Document section, click **Choose File** to upload the certificate of insurance document.
- c. Adjust the **Legal Entity** and **Associated Properties** drop-downs as needed.
- d. If required, complete the Waiver of Subrogation and Additionally Insured sections.
- e. Scroll down to the Select Insurance Policies Appearing on Document (COI) section, and click **+ Add New Policy**. Complete the additional fields that appear.
- f. Repeat step 10 as needed.

i To remove a policy, click the delete icon **✕** in-line with the policy.

- g. Once all desired insurance information has been entered and documentation uploaded, click **Add**. You return to the Customer Requirements screen.

i The requirement continues to show **⊖ Action Required** until the customer has logged in to Entrata, reviewed the documentation, and accepted it.

Fulfilling Purchases in VendorAccess for Entrata Customers

In this article:

- [Reviewing Purchase Orders](#)
- [Creating an Invoice](#)

In Entrata's AP exchange, as your customer creates POs through your synced profile in Entrata, these POs populate in your VendorAccess account for you to review and fulfill. You can then create an invoice in VendorAccess to sync back to your customer's Entrata environment, which they can then use to process payment. In addition to covering how to review POs and create invoices, this article also covers the various statuses and actions in VendorAccess that help you manage these transactions.

Before you begin:

- Add a customer account and have it synced to their account in Entrata. For help, see the article [Building a VendorAccess Account](#) .

Associated Products:

VendorAccess™

Entrata® Accounting™

Reviewing Purchase Orders

Before you begin:

- An Entrata user creates a PO and syncs it to your VendorAccess account.

1. Log in to your VendorAccess account.
2. On the dashboard, click the **New Order(s)** quick link. This navigates you to the Orders page and filters for orders with a New status.
3. Click the desired PO number to open the Purchase Order screen and review the PO. The PO's status changes to Open.
4. To update the PO status and give the PO an assignment, click  **Edit** and adjust the fields as needed.

 Create Invoice
 Print

 Edit

Not Ordered

QTY.	UNIT COST	TOTAL
1	\$800.00	\$800.00
TOTAL		\$800.00

Changing a PO's Assignment and Order Status

- a. If desired, the click the **Assignment** drop-down, and select the user to be assigned to fulfill PO.
- b. The click the **Order Status** drop-down, and select the appropriate status. These statuses keep your customer informed of the PO's progress as you fulfill (or cancel) it.

 These are the PO statuses and the actions the you can take with each.

- **Open:**
 - The PO has been initially seen and reviewed, but has not begun any fulfillment, or been denied and cancelled. The customer may still edit the PO in Entrata.
- **In Progress:**
 - **Mark In Progress** means you are in the process of fulfilling the PO, and locks it in Entrata so the customer can no longer edit the PO.
 - **Note:** If the customer reaches out to you wanting to make an edit to the PO in this status, you have the option to roll the order back to an **Open** status, where they can edit the

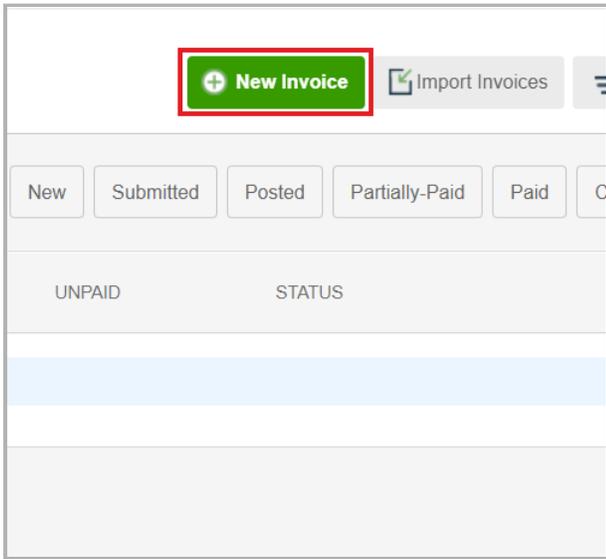
PO. Or, if preferred, have them submit a new PO with the updated details and cancel the first one.

- **Fulfilled:**
 - **Mark as Fulfilled** signifies that you've completed the PO and helps you organize orders to identify which orders have been complete, but have not been invoiced in VendorAccess. You can create an invoice for the PO by clicking  **Create Invoice**. For help, see the section of this article called [Creating an Invoice](#).
- **Deny/Cancel:**
 - Marking with **Deny/Cancel** returns the PO to the customer if they cancel the order, if they request to submit an updated PO, or if you are unable to fill and complete the order.

Creating an Invoice

You can create an invoice in VendorAccess either associated or not associated to a PO.

1. Log in to your VendorAccess account.
2. Navigate to the Invoices sidetab.
3. Click  **New Invoice** to open the Add Invoice screen.



i You can also create an invoice directly from a PO, by clicking **+ Add Invoice** in the Purchase Order screen.

QTY.	UNIT COST	TOTAL
250	\$1.01	\$252.50
TOTAL		\$252.50

For more information on POs, see the section of this article called [Reviewing Purchase Orders](#).

4. Choose or adjust the **Customer/Account** as needed.
5. To load a PO or POs to invoice, search and select the PO(s) from the **PO Number** drop-down menu, and click **Load**. The POs' information loads in the invoice fields.
6. Complete and adjust the following fields as needed:
 - **Property**
 - **Invoice Number**
 - **Invoice Total**
 - **Invoice Date**
 - **Due Date**

i A remaining balance is shown next to the **Invoice Total** field to indicate the amount funds left to be charged to the customer. If the invoice was created from a PO, it starts by showing a negative amount remaining, and goes to 0 when the total matches the line items in the new invoice. If the invoice is manually created, it shows a positive amount, and goes down to zero as line items and their amounts are added.

i **Note:** All notes and attachments added are visible to the customer when they receive the invoice in

- **Note**

7. If needed, at the bottom of the line item section, click  **Add Line Item**. A new line item appears. Complete and adjust any of the following fields:
 - **Property**
 - **Description**
 - **Qty.**
 - **Rate**
8. When satisfied with the invoice, click **Save and Submit**. The invoice is synced to your customer's invoice queue in Entrata, where it goes through their approval process leading up to payment.

 After an invoice is created, there are several statuses an invoice can be in. This section lists each status and the actions that can take place within the status.

- **New:**
 - A new invoice that has been saved but not shared with your customer yet.
- **Submitted:**
 - Invoices in the Submitted status are still editable, and have been submitted to the customer.
- **Posted:**
 - The customer has approved and posted the invoice in Entrata.
 - Invoices in the Posted status are no longer editable within VendorAccess by you.
 - No further action is required on the invoice, and all subsequent statuses are for information purposes only.
- **Partially-Paid:**
 - The Partially-Paid status indicates that the customer has flagged only a portion of the invoice as paid.
 - If you've not yet received any payment, this can indicate you'll receive a portion of the payment soon.
- **Paid:**
 - The Paid status indicates the customer has marked the invoice being paid in full.
 - If you've not received the payment, this status can indicate you'll receive it soon.
- **Cancelled:**

Entrata.

 You can also click **Save Invoice** to save the current invoice details, and then return to complete it before you submit it to your customer in Entrata.

 The **Bulk Action** drop-down menu on the Invoices listing screen allows you to take actions and change statuses on multiple invoices at once. Check the box in-line with an invoice, and select an option from the drop-down. You can also select all invoices in the list by checking the box at the top of the list. The actions in the drop-down are as follows: **Export Selected**, and **Submit**.

- Invoices can be cancelled by you or the customer.
- Invoices cancelled by the customer do not have any additional actions available.
- Invoices cancelled by you in VendorAccess can be re-opened. You can cancel an invoice by clicking **Actions** ▼ in-line with the invoice and select **Cancel** from the drop-down menu. To re-open a cancelled invoice, click the same drop-down and select **Re-Open**.

