

# SERVICE PROVIDERS

Searching the Service Provider List

Provider Types

Service Provider Update Action Item

New Service Provider Setup Action Item

**REFERENCE RESOURCES:**

<https://vantaca.zendesk.com/hc/en-us/articles/360017793671-Viewing-Invoices-Using-the-Service-Providers-Invoices-Page>

<https://vantaca.zendesk.com/hc/en-us/articles/360025047271-Service-Provider-Documents>

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**SERVICE PROVIDER LIST:**

**Service Providers > Service Provider List**

To see if a company is in Vantaca already, go to the Service Providers menu > Service Provider List. Search in the Provider Name and/or DBA columns.

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**SERVICE PROVIDER TYPES:**

**Service Providers > Service Provider List > Provider Type column**

Many Service Providers are categorized by the type of work they do. (Ex. Auditor, Electrician, Landscaping, Supplies, etc.) This is a new feature created based on feedback from our community managers.

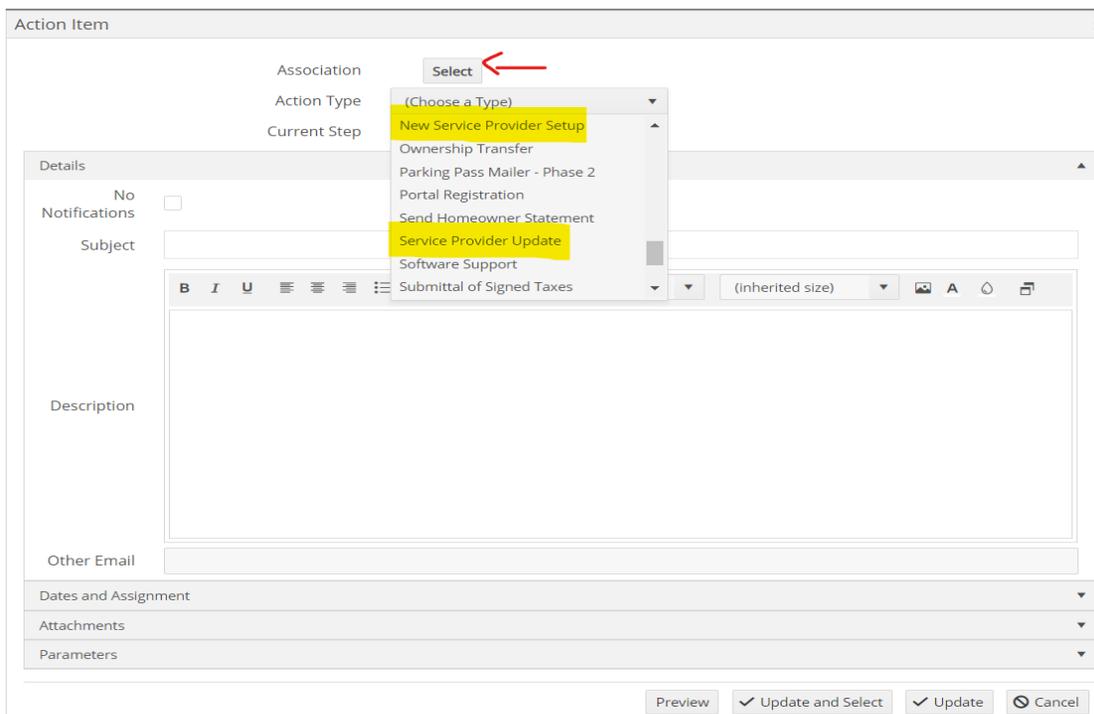
Please search this list for companies that could do work at your association before engaging and setting up a brand new company.

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**SERVICE PROVIDER RELATED ACTION ITEMS**

**Service Providers > Action Items OR Association > Action Items**

There are two relevant action items in Vantaca: New Service Provider Setup & Service Provider Update.



**Service Provider Update** = to update information or documents for a company that *already* exists in the list. *See step-by-step instructions on page 3.*

**New Service Provider Setup** = to add a brand new company to the list following GHCM's New Service Provider Set Up Policy. *See step-by-step instructions beginning on page 4.*

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**CORRECT USE:**

To identify the correct action item for your request:

- If the company you're interested in IS in the list and you want to use them at a specific association, then create a Service Provider Update action item. Start at the step 'Enable Service Provider in Strongroom'. Include the full company name AND mailing address.
- If the company you're interested in IS in the list, but their documents (ex. COI, business license) are expired, then create a Service Provider Update action item. Start at the relevant Step 1-10. Include the full company name AND mailing address.
- If the company you need ISN'T in the list, check Jenark > AP > Inquiry > Vendor File Inquiry. If they were in Jenark, their insurance is current and they've been paid recently (generally in 2020), take the same steps as above and include the Jenark vendor code.
- If the company you need ISN'T in the list AND hasn't been paid recently, then obtain their information and create a New Service Provider Setup action item.

## **ACTION ITEMS INSTRUCTIONS**

**Service Provider Update**      *To update COI expiration dates, mailing address/contact info, etc. AND to request existing Service Providers be added to Strongroom. Replaces the process of mailing the information to vendor@ghacm*

Steps:

*All operations users can create this action item. Choose the applicable Current Step 1-20.*

1-Update COI:

- In the Subject line, enter the Service Provider's name
- In the Description box, type in any relevant information.
- To add an attachment, expand the Attachments menu. Click 'Select files' to attach a file.
- Click the Update button and the action item will be sent to Accounting.

5-Change of Address

- In the Subject line, enter the Service Provider's name
- In the Description box, type in any relevant information.
- To add an attachment, expand the Attachments menu. Click 'Select files' to attach a file.
- Click the Update button and the action item will be sent to Accounting.

10-Update W9/Business License

- In the Subject line, enter the Service Provider's name
- In the Description box, type in any relevant information.
- To add an attachment, expand the Attachments menu. Click 'Select files' to attach a file.
- Click the Update button and the action item will be sent to Accounting.

20-Enable Service Provider in Strongroom

- In the Subject line, enter the Service Provider's name
- In the Description box, type in the service provider's mailing address so the correct entry is identified.
- Click the Update button and the action item will be sent to Accounting.

40-52-Reject - More Info Needed (YOUR JOB ROLE)

- The action item will be returned to the requestor if Accounting needs more information.
- Type your information in the Note box and/or upload applicable attachments.
- Click the Update button and the action item will be sent back to Accounting.

80-Complete

- The action item will be moved to this step once the request has been approved and the information has been updated.

99-Void: move to this step if the item needs to be deleted/removed. Update.

## New Service Provider Setup

Replaces our New Vendor Set Up process of emailing information to vendor@ghacm. The setup requirements remain the same.

### Steps:

#### 1-New Service Provider Request:

- An Administrative Assistant, onsite employee, or Portfolio Manager creates the action item
- In the Subject line, enter the Service Provider's name
- In the Description box, type in any relevant information.
- To add an attachment, expand the Attachments menu. Click 'Select files' to attach a file.
- Click Update to save the action item at the current Step.
- Once the documents are attached the Portfolio Manager will need to approve Step 1.

The screenshot shows a web-based form titled "Action Item" with a close button (X) in the top right corner. The form is divided into several sections:

- Association:** "Residential Valley (999)" with "X" and "Select" buttons.
- Action Type:** "New Service Provider Setup" (dropdown menu).
- Current Step:** "1 - New Service Provider Request" (dropdown menu).
- Details:**
  - No Notifications:**
  - Subject:** "Setup XYZ Tree Care" (text input).
  - Description:** A rich text editor containing the text "Please see the attached documents: coversheet, W9, COI and business license." The editor has a toolbar with bold, italic, underline, list, link, unlink, and code icons, along with font and size dropdowns.
  - Other Email:** (empty text input).
- Dates and Assignment:** (dropdown menu).
- Attachments:** (dropdown menu, highlighted with a red arrow).
- Parameters:** (dropdown menu).

At the bottom of the form, there are four buttons: "Preview", "Update and Select", "Update", and "Cancel".

Action Item X

Association: Presidential Valley (999) X Select

Action Type: New Service Provider Setup ▼

Current Step: 1 - New Service Provider Request ▼

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Details ▼

Dates and Assignment ▼

**Attachments** ▲

Attachments (25 MB Upload Limit) Select files...

Documents [Empty Input Field]

Reports [Empty Input Field]

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Parameters ▼

Preview ✓ Update and Select ✓ Update ⊘ Cancel

The Action Item will move to the Portfolio Manager’s My Action Items queue:

- Expand the action item using the arrow on the left
- Click on the green paper clip on the right to view the documents. The attachments will open in a new window.
- If the documents are correct and complete, click on the hamburger menu and choose Approve.
  - The action item will step to the office VP for approval.
- If the documents are not correct or complete, click on the hamburger menu and choose Decline.
  - The action item will return to the role that submitted it.
- Upon Approve or Decline, the action item window will pop up.
- Click Update. The action item will move to the next step.

All Action Items - (999) Presidential Valley

Manager  
Testing

Include Closed
  Save Custom List
 
 Bulk Step
 ⚙

Drag a column header and drop it here to group by that column

	XN#	Type	Step	Assig...	Follow...	Due ...	Details
▼	67205	New Service Provider Setup	New Service Provider Request				Presidential Valley Set up XYZ Tree Care <span style="float: right;">☰</span>

Messages Assigned

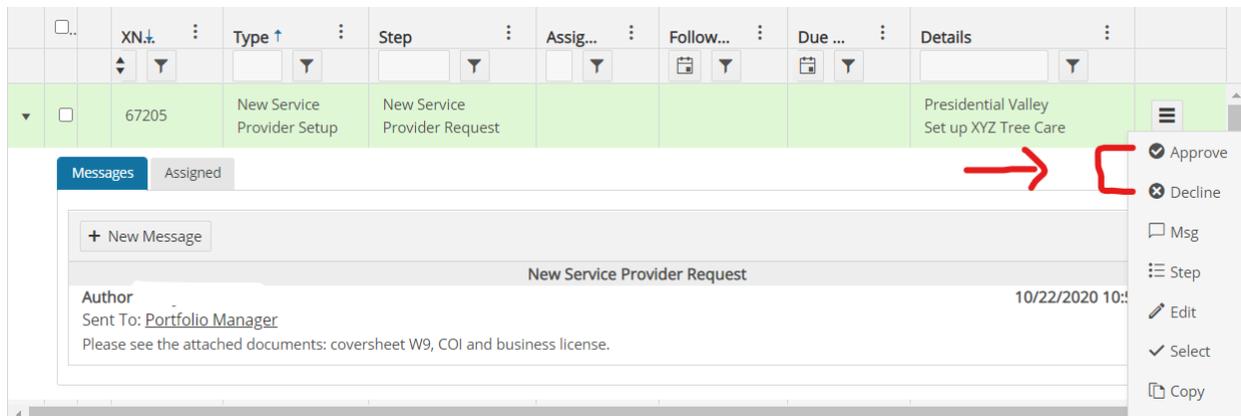
**New Service Provider Request**

Author: 10/22/2020 10:56:25 PM

Sent To: [Portfolio Manager](#)

Please see the attached documents: coversheet W9, COI and business license.

Page 1 of 1 250 items per page 1 - 9 of 9 items



#### 2-Vice President Approval:

- The action item will Step to the appropriate office VP for review and approval.
- The VP will expand the action item using the arrow on the left.
- Click on the green paper clip on the right to view the documents. The attachments will open in a new window.
- Use the hamburger menu to Approve or Decline.
- Decline will return the action item to Step 1.
- Approve will move the action item to Step 20.

#### 20-New Service Provider:

- The AP/AR Supervisor reviews the documents.

#### 40-AP/AR Supervisor Denied:

- If the AP/AR Supervisor needs more information they can Step the action item back to the VP.
- If the VP can answer, enter the relevant information and Approve.

#### 45-Vice President Denied:

- If the VP can't answer the AP/AR Supervisor's question, they can Decline the action item back to the Portfolio Manager.

#### 47-Service Provider Added/Updated:

- The AP/AR Supervisor will mark the action item completed when the information is updated in Vantaca.
- The Administrative Assistant, onsite employees, and Portfolio Manager will see this action item back in their queue in order to be notified that the setup is complete.

50-Closed: the action item will automatically close after 1 day in the previous Step.

99-Void: move to this step if the item needs to be deleted/removed. Update.