Toronto Community Housing

TCHC User Guide for

VendorCafe®

Sept 2022

This user guide provides information to TCHC Vendors who are registered for VendorCafe. Using VendorCafe, TCHC vendors will receive work orders, provide updates, request escalations, submit and track invoices.

User Guide Contents

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Who to Contact for Support:

Vendor Café system errors/issues: homes.vendorsupport@torontohousing.ca

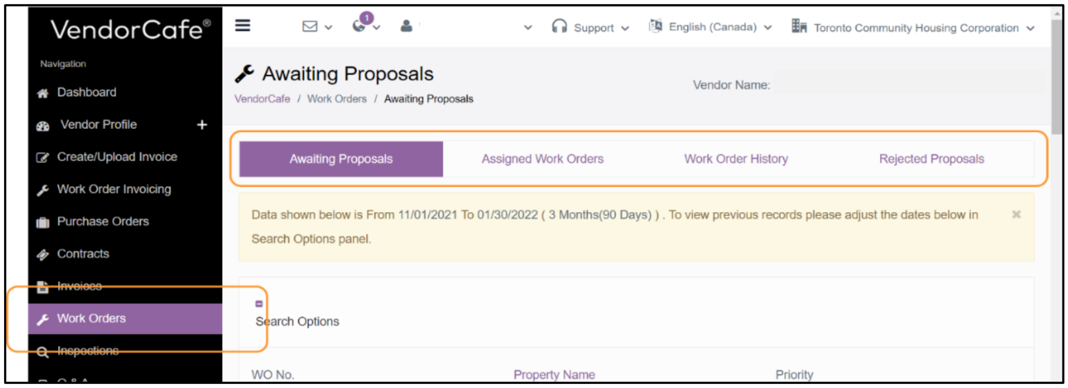
Updating vendor profile/insurance for TCHC: purchase.orders@torontohousing.ca

Requesting updates on submitted invoices: accounts.payable@torontohousing.ca

Need to update a WO price or provide resolution details for a WO: dispatch@torontohousing.ca

Navigating VendorCafe for Work Orders

From the side menu, click **Work Orders**.



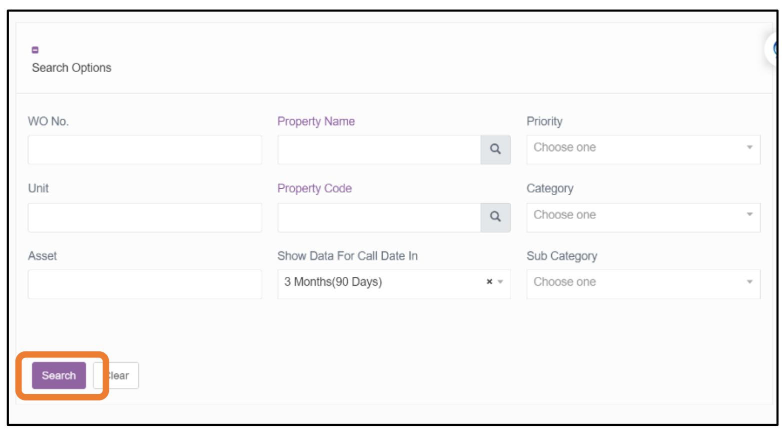
Four tabs will appear:

- **Awaiting Proposals:** If TCHC has requested a quote from you, the work order will appear under this tab.
- **Assigned Work Orders:** Work orders that are assigned to you and still in progress (not completed) will appear under this tab.
- **Work Order History:** Your completed work orders, or work orders for which you have requested a price escalation, will appear under this tab.
- **Rejected Proposals:** Quotes that have been rejected will appear under this tab. If your quote was rejected, and TCHC is requesting you to re-submit a quote, it will appear under the Awaiting Proposals tab. If a work order has also gone through a price escalation and a new price was approved, the work order and the old price will appear here.

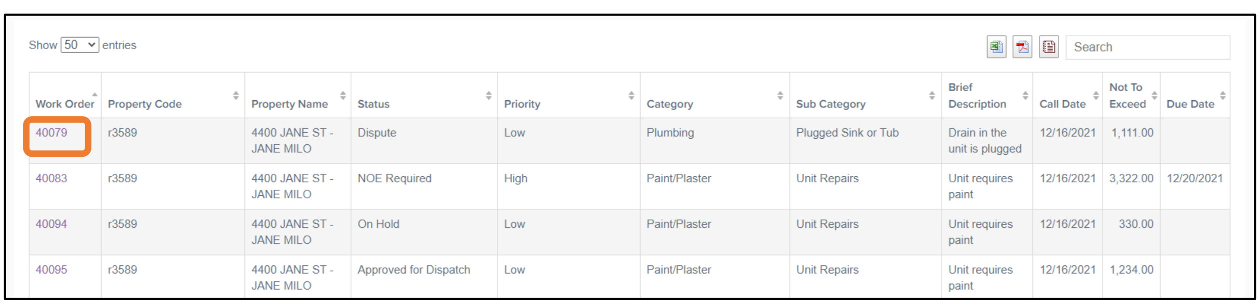
On each of tab, you can use filters to search for work orders. Use one or multiple filters, and click **Search**.

Please ensure that you change the “Show Data for Call Date” field to 36 months to ensure that you will see all your work orders.

You can also use the search bar at the top of the work order columns to give more flexibility on what you can search by.



A list of work orders will appear based on the filters selected. Click on the **Work Order number** to open the work order.



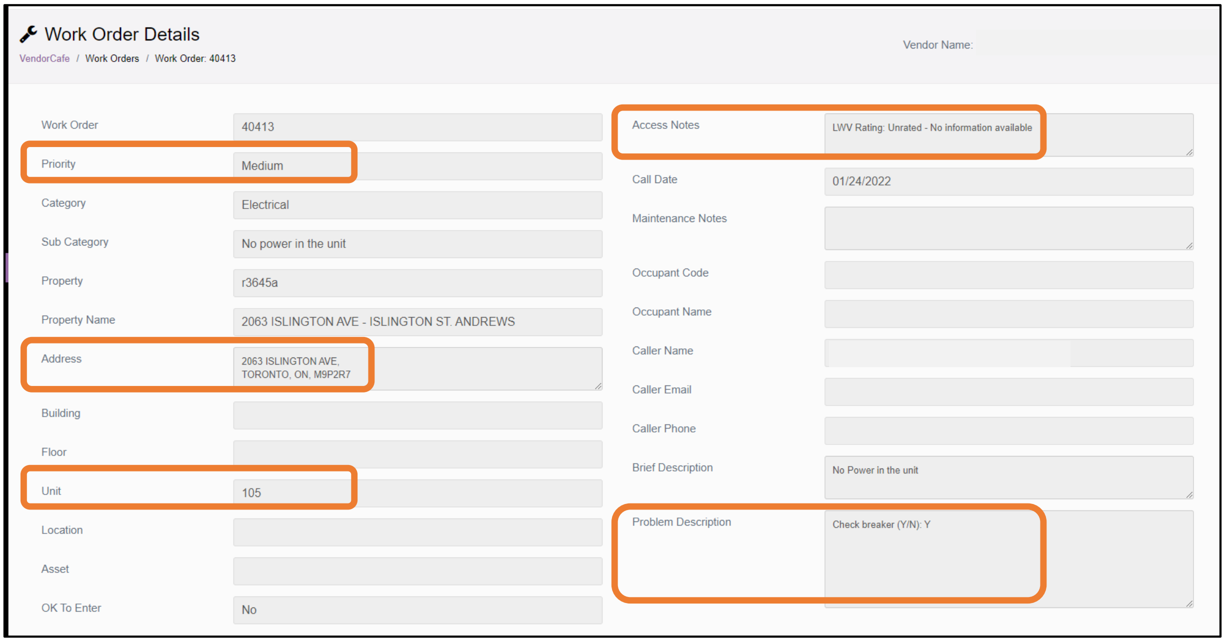
Show 50 entries | Search

Work Order	Property Code	Property Name	Status	Priority	Category	Sub Category	Brief Description	Call Date	Not To Exceed	Due Date
40079	r3589	4400 JANE ST - JANE MILO	Dispute	Low	Plumbing	Plugged Sink or Tub	Drain in the unit is plugged	12/16/2021	1,111.00	
40083	r3589	4400 JANE ST - JANE MILO	NOE Required	High	Paint/Plaster	Unit Repairs	Unit requires paint	12/16/2021	3,322.00	12/20/2021
40094	r3589	4400 JANE ST - JANE MILO	On Hold	Low	Paint/Plaster	Unit Repairs	Unit requires paint	12/16/2021	330.00	
40095	r3589	4400 JANE ST - JANE MILO	Approved for Dispatch	Low	Paint/Plaster	Unit Repairs	Unit requires paint	12/16/2021	1,234.00	

Reviewing a Work Order

There are three parts to a work order.

The first part identifies where the work is required (such as address and unit) as well as details about the work (such as priority, category, sub-category and problem description).



Priority: There are four priority levels:

Critical – immediate response is required
High – 1 to 4 hour response is required
Medium – 1 to 3 business day response is required
Low – 1 to 5 business day response is required

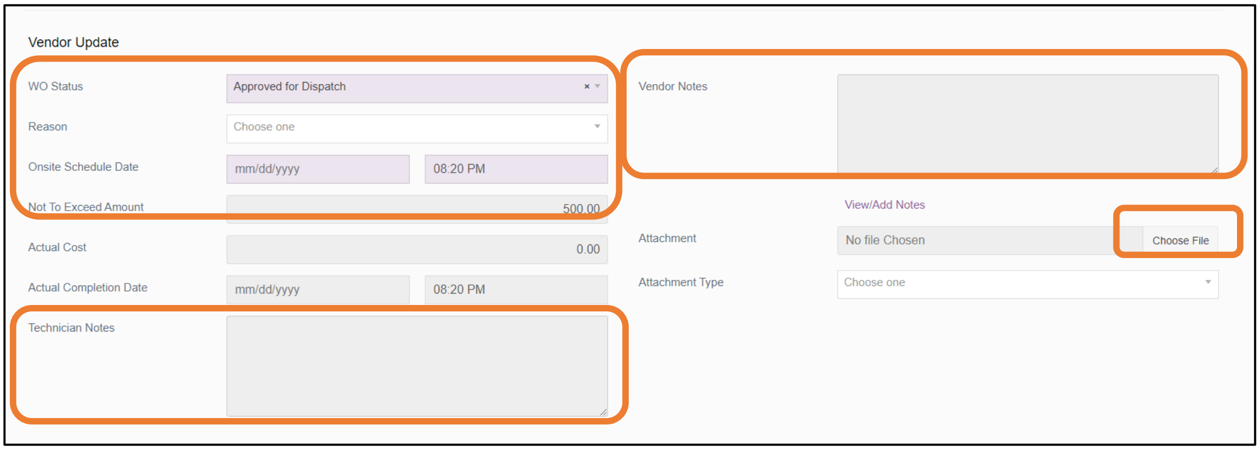
Address: This is the address/location for which work is required.

Unit: If work is required in a tenant unit, the unit number will be listed, and a Notice of Entry (NOE) will be required before you are able to attend to the unit.

Access Notes: If there is additional information about the tenant, it will appear here. For example, precautions to be taken when entering the unit (such as attending the unit with a security escort, pets in the unit) or if a tenant prefers to be addressed by a preferred name.

Problem Description: This field is used to provide information about the issue that has been reported, as well as details about the required repair (such as measurements). If the work order is related to a quote request, the scope of work and details may be listed here.

The second part of the work (Vendor Update) identifies the status of the work order, onsite and completion dates, notes and attachments.



WO Status: This indicates the status of the work order. Use this field to update the status of the work. As a vendor, you will have access to update your work order. Refer to the **Appendix** for a full listing of work order statuses and what each status means.

Reason: Certain work order statuses will have this field filled in to provide more information. For example, a work order may be On Hold because it is waiting for parts, or a reason for why a work order has been cancelled, or the nature of the dispute if the work order is in Dispute status. Refer to the **Appendix** for a full listing of work order statuses, reasons and how they should be used.

Onsite Schedule Date: Enter in the date and time that you will be on-site. It is important to be accurate with this information because it will be used for the Notice of Entry if entry into a tenant unit is required, as well as to inform Building Staff when to expect you. If you are no longer able to attend at this date and time, you will need to notify Building Staff right away to cancel the appointment so that the tenant can be informed.

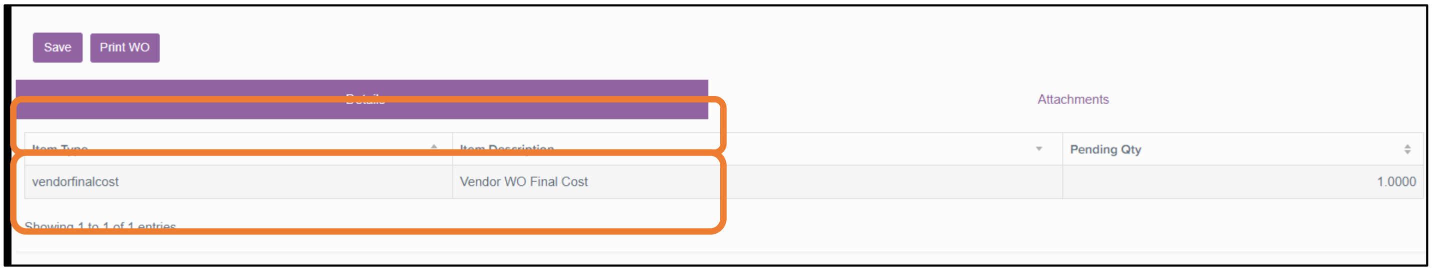
Not To Exceed Amount: This is the amount that the cost of repairs is not to exceed, and invoices cannot be submitted at a price higher than this amount. If the cost is to exceed this amount, you must have the cost approved through the Price Escalation process in order to perform the work. Once the Price Escalation is approved by TCHC, the Not To Exceed Amount will be updated with the new amount.

Technician Notes: This field is used by TCHC staff to enter notes about the work order.

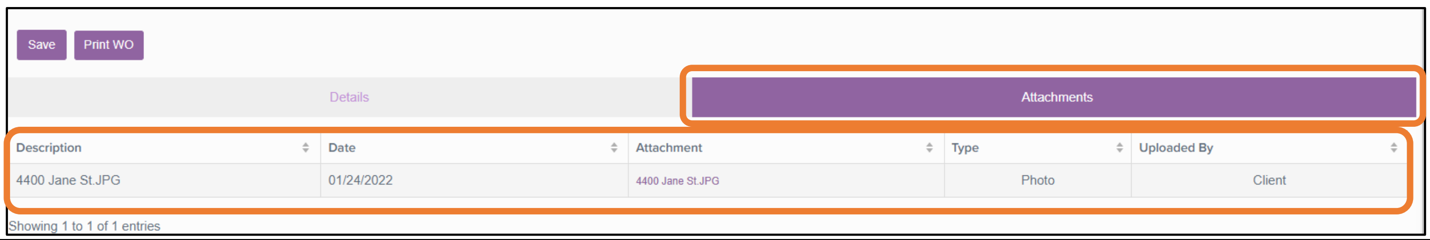
Vendor Notes: As a vendor, you have access to this field to enter in notes such as completion details for the work order. You will also use this field to enter information about any price escalation requests (you will also need to change your Work Order Status to On Hold and select Waiting for approval as the Reason).

Attachments: You can upload files to a work order and they will be visible to TCHC staff. Please ensure to select the Attachment Type/Folder when adding attachments to a work order. Vendors will see two folder options for attachments – Vendor Documents and Photos and Videos. When adding attachments, please ensure that there are no special characters/symbols (#, $, /) in the file name as the system won't recognize the file and it won't be attached.

Details tab: This tab will show any material items that have been added to the work order, such as unit priced items related to a specific contract. You will also see approved Price Escalation and Final Cost information under this tab.

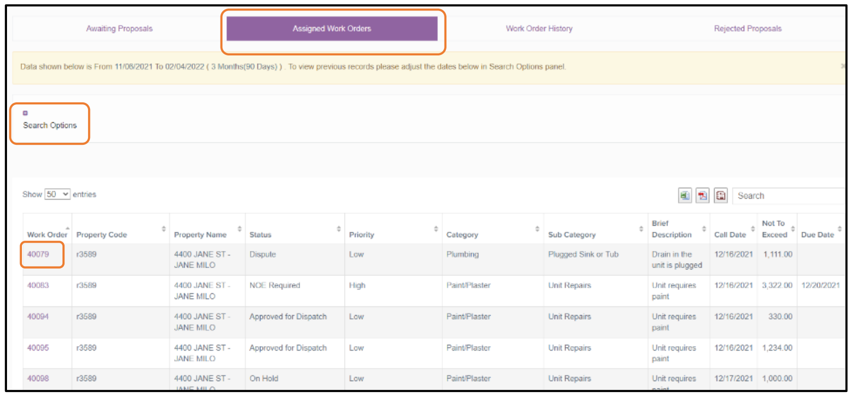


Attachments tab: Any attachments to the work order – uploaded by you or TCHC – will be listed here. The attachment type will also be listed.

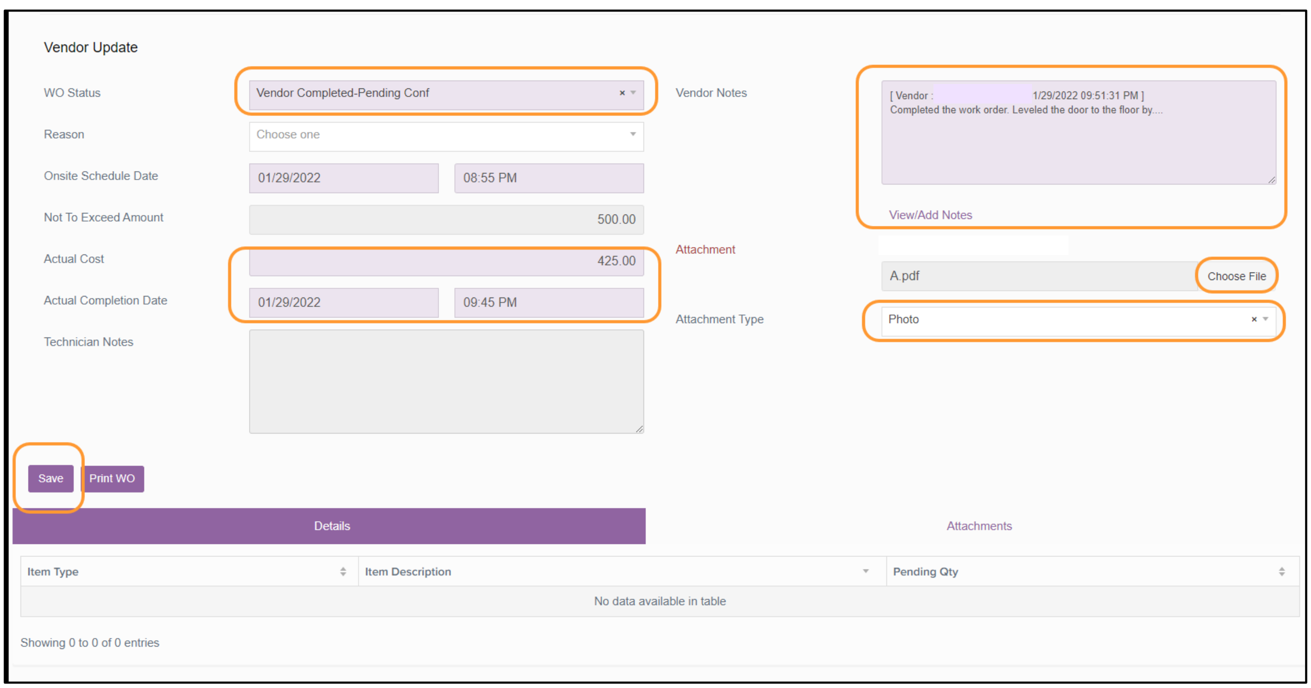


Updating a Work Order

Vendors are required to update their work orders by changing the **WO Status** and adding **Vendor Notes**.



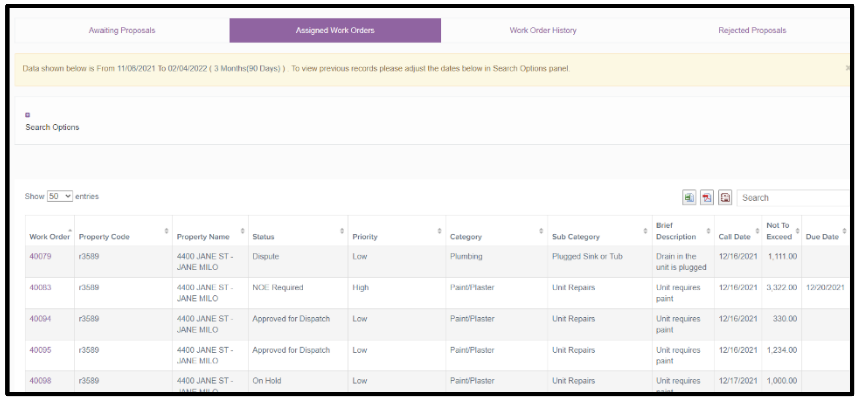
1. From the side menu, click **Work Orders**.
2. Click the **Assigned Work Order** tab.
3. Enter in the work order number or search for the work order to be updated using **Search Options**. Click the **Work Order number**.
4. Use the **Vendor Notes** field to enter details about the work order status and progress. Click **View/Add Notes** to enter notes in the **Vendor Notes** field.
5. Add any related attachments if necessary. Select **Choose File** and upload the attachment from your computer. Select an **Attachment Type** by clicking on the drop down arrow.
6. Enter the **Onsite Schedule Date and Time** that you will be on-site. This information is used to create a Notice of Entry (NOE) for entry into a tenant's unit if applicable. Refer to the section on **Requesting a Notice of Entry** for more details.
7. Update the **WO Status** using the appropriate status. Refer to the **Appendix** for a full listing of work order statuses and what each status means.
8. Click **Save**.



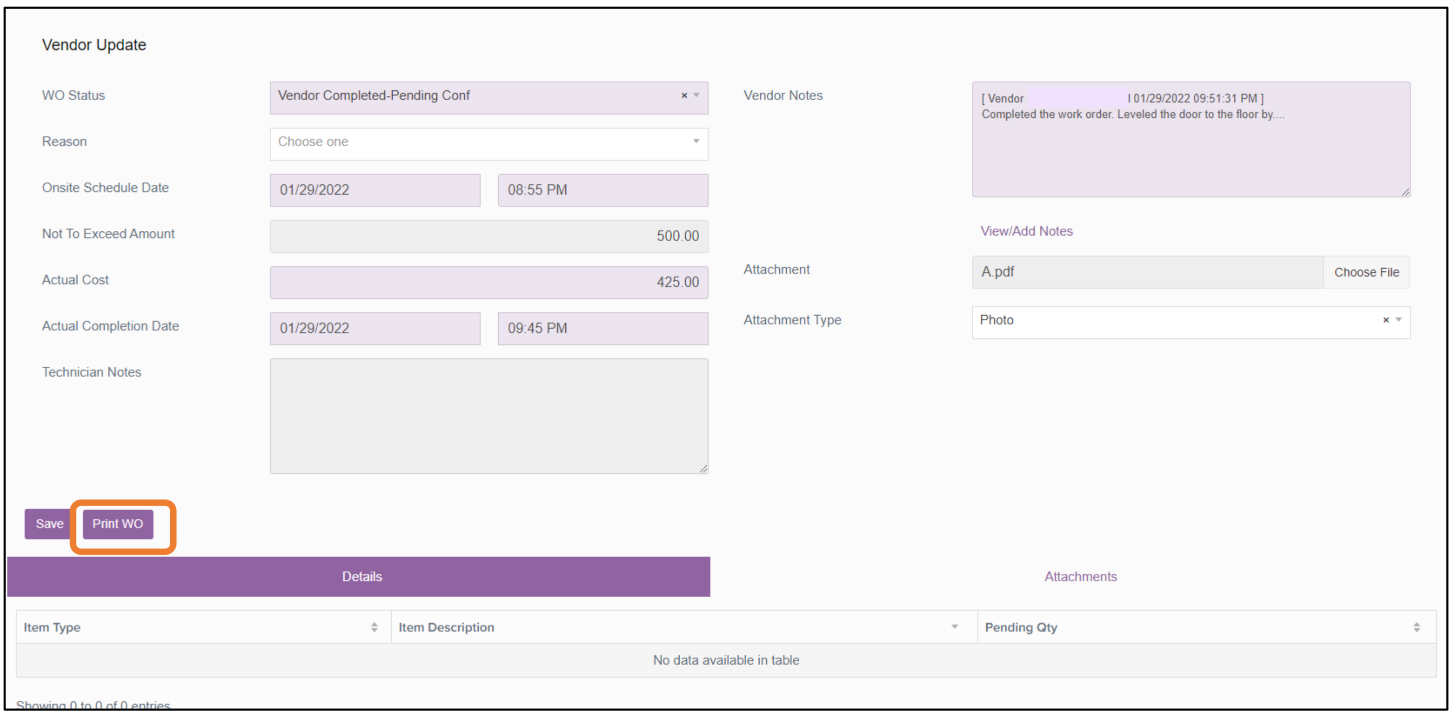
Printing a Work Order

To print a work order:

1. From the side menu, click **Work Orders**.
2. Choose a work order from any tab listed on the dashboard.
3. Enter in the work order number or search for the work order you want to print using **Search Options**. Click the **Work Order number**.
4. Click **Print WO**.



The printed work order will have the most recent updates on the work order. It will also have the Property Contact Information and TCHC Contact information for that work order and property.



Requesting a Notice of Entry (NOE)

A Notice of Entry (NOE) is required to enter a tenant’s unit. TCHC must provide the tenant with at least 24-hours’ notice when attending their unit, unless the issue is an emergency. Any work order that has a Unit number populated on the work order will require an NOE to enter the tenant’s unit. The date and time you enter in the Onsite Schedule Date field is used for the NOE. Please ensure the time entered is between 9am – 4pm.

1. From the side menu, click **Work Orders**.
2. Click the **Assigned Work Order** tab.
3. Search for the work order for which an NOE is required by using **Search Options or Search field**. Click the **Work Order number**.
4. Enter the **Onsite Schedule Date and Time** that you will be on-site.

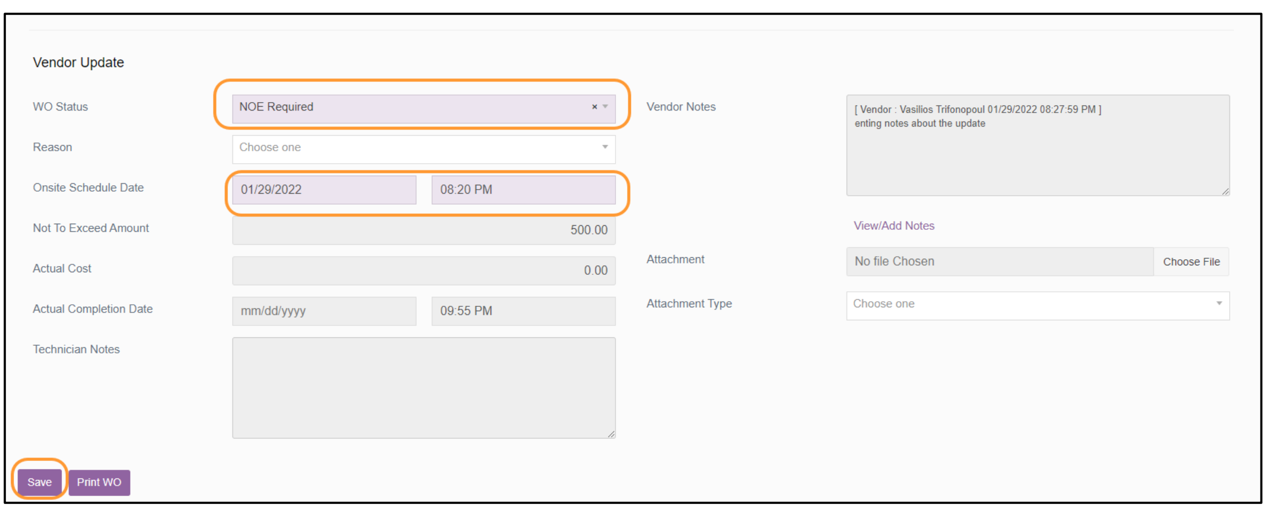
   It is important to be accurate with this information because it will be used for the NOE and it will inform Staff on when you will be attending. Depending on the time entered, the NOE will indicate that entry into the unit will be within one of these three time frames:

   9am-12pm (noon); 11am-2pm; 1pm-4pm.

   - Time entered is between: 9:00am - 10:59am = 9am-12pm timeslot
   - Time entered is between: 11:00am – 12:59pm = 11am – 2pm timeslot
   - Time entered is between: 1:00pm – 4:00pm = 1pm – 4pm timeslot

   If you are no longer able to attend at this date and time, you will need to notify Building Staff right away to cancel the appointment so that the tenant can be informed. A new appointment will need to be scheduled and a new NOE will need to be requested.
5. Update the **WO Status** to **NOE Required**.
6. Click **Save**.

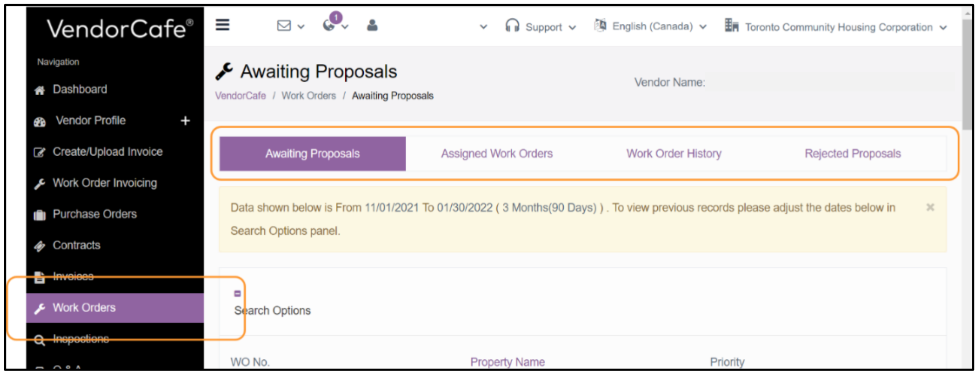
Building Staff will be notified and they will generate the NOE and deliver it to the tenant. Once the NOE is delivered to the tenant, the **WO Status** will be updated to **NOE Delivered**. This will let you know that the tenant has been notified and that you may attend the unit at the time indicated.



Responding to a Request for a Quote

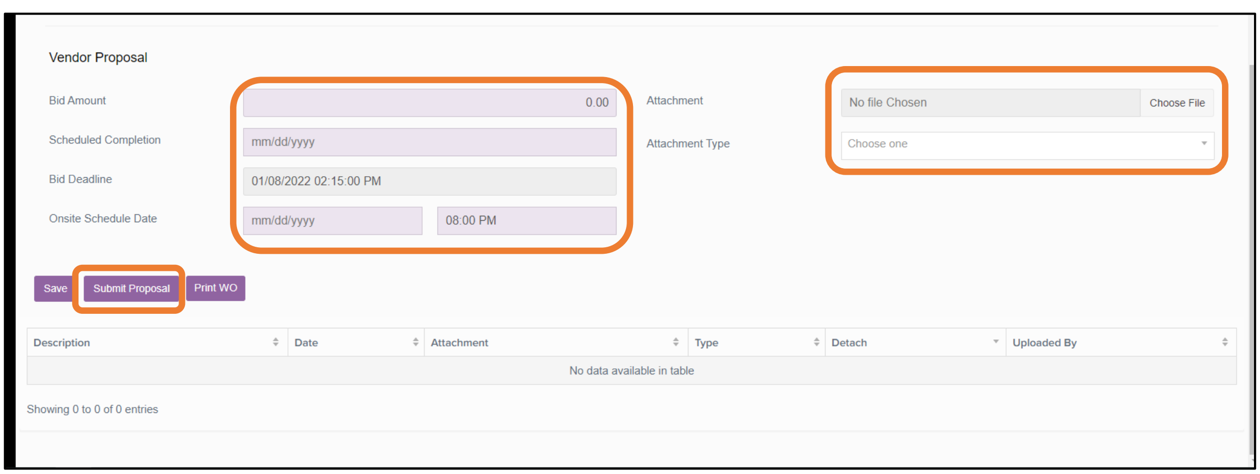
TCHC may request vendors to submit a quote for a specific scope of work. If a quote is requested, you will be notified by email that a Bid Request has been sent to you. Check for this request under the Awaiting Proposals tab. All details pertaining to the location and scope of work will be provided on the work order.

1. From the side menu, click **Work Orders**.
2. Click the **Awaiting Proposals** tab.
3. Click the **work order number**.
4. Review the work order to identify the scope of work as well as any attachments that may be provided.



5. Review the **Bid Deadline date and time**. Quotes will not be accepted past this date and time.
6. In the **Bid Amount** field enter in your quote amount (without tax).
7. In the **Scheduled Completion** enter in the date that you expect the work to be completed if your quote is accepted and approved.
8. In the **Onsite Schedule Date** field enter in the date and time that you expect to be onsite to complete the work if your quote is accepted and approved. If the work is in a tenant unit, this information is used for the Notice of Entry. Refer to the Requesting a Notice of Entry (NOE) section to identify how to request one.
9. Add any related attachments, such as a quote document. Select **Choose File** and upload the attachment. Select an **Attachment Type** by clicking on the drop down arrow.
10. Click **Submit Proposal**. TCHC will be notified of your submission.

The work order is now locked (no edits can be made), and will remain in this folder until a decision has been made by TCHC. If you have entered an incorrect amount, contact TCHC.



Once a decision has been made by TCHC, you will be notified.

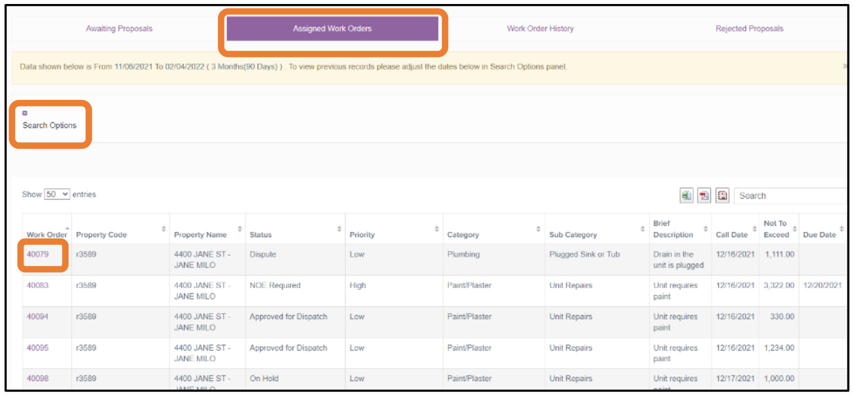
If your quote was approved: the work order will show up in the **Assigned Work Orders** tab. You can proceed with the work at the scheduled date and time. The status of the work order will be **Quote Request Approved**.

If your quote was not accepted/approved: the work will show up in the **Rejected Proposals** tab. You are not to proceed with the work.

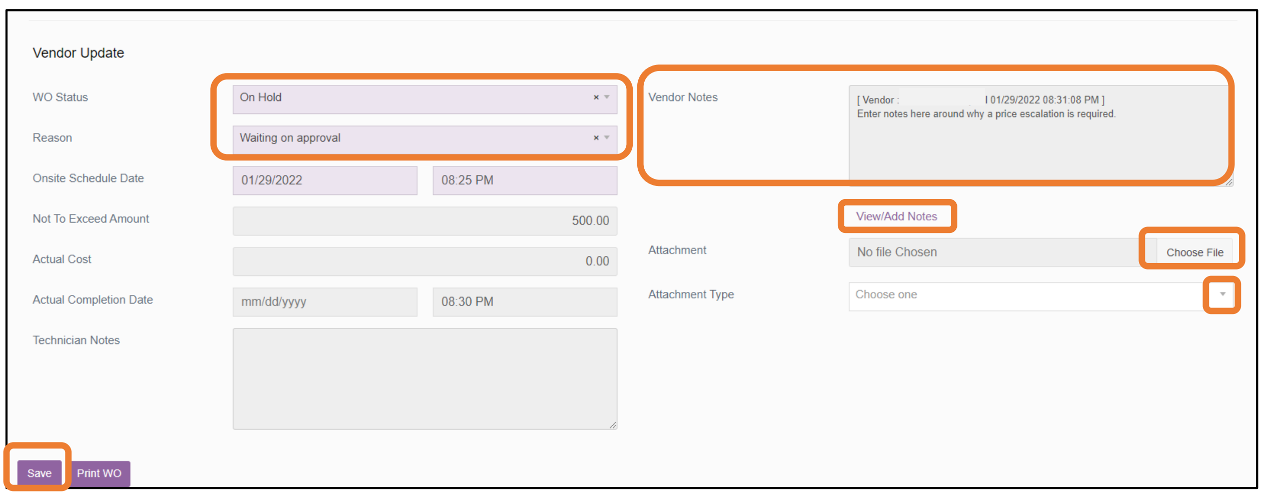
If your quote was not accepted/approved and you have been asked to re-submit a quote (such as the scope of work has changed): the work order will be in the **Awaiting Proposals** tab.

Requesting a Price Escalation

All work orders have a **Not to Exceed Amount**. This is the amount that the cost of repairs is not to exceed, and invoices cannot be submitted at a price higher than this amount. If the cost is to exceed this amount, you must have the cost approved through the Price Escalation process in order to perform the work. Once the Price Escalation is approved by TCHC, the Not to Exceed Amount will be updated with the new amount.



1. From the side menu, click **Work Orders**.
2. Click the **Assigned Work Order** tab.
3. Search for the work order for which a price escalation is required using **Search Options**. Click the **Work Order number**.
4. Update the **Work Order Status** to **On Hold**. **Reason** select is **Waiting on approval**.
5. Use the **Vendor Notes** field to enter details about the price escalation requested. This price should be the total cost before taxes and inlcude any details as to why the escalation is required. Click **View/Add Notes** to enter notes in the **Vendor Notes** field.
6. Add any related attachments. Select **Choose File** and upload the attachment. Select an **Attachment Type** by clicking on the drop down arrow.
7. Click **Save**.



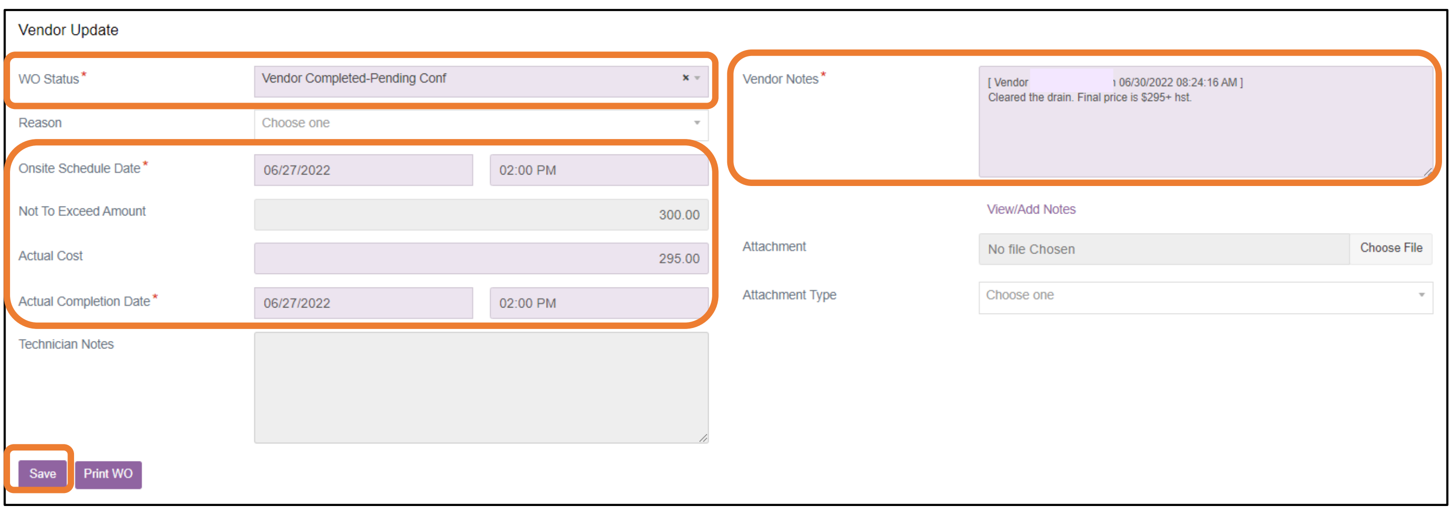
If your price escalation is approved: the **WO Status** will change to **Price Escalation Approved**. You can start the process of scheduling the work order. You will also get an email letting you know it was approved.

If your price escalation was not approved: the **WO Status** will still be **On Hold**, but the **Reason** will change to **Escalation Denied**. Review the **Technician Notes** for details on how to proceed. Change the work order status to Accepted to indicate you will be proceeding with the original repair.

Completing a Work Order

Once you have completed the entire scope of work, you must update the WO status and provide a final cost for the repairs. TCHC staff will inspect the work and approve the work order which will allow you to submit an invoice for payment.

1. From the side menu, click **Work Orders**.
2. Click the **Assigned Work Order** tab.
3. Search for the work order using **Search Options**. Click the **Work Order number**.
4. Update **WO Status** to **Vendor Completed – Pending Conf**.
5. In the **Actual Cost** field, enter in the final cost without tax. You will not be able to submit a final cost that is greater than the **Not To Exceed Amount**.
6. In the **Actual Completion Date/Time** fields, enter in the date and time the work was completed.
7. Use the **Vendor Notes** field to enter details about actions takne, labour and costs to complete the repair. Click **View/Add Notes** to enter notes in the **Vendor Notes** field.
8. Add any related attachments. Select **Choose File** and upload the attachment. Select an **Attachment Type** by clicking on the drop down arrow.
9. Click **Save**.



TCHC staff will inspect the work once it has been completed.

- If there are no issues with the work completed, TCHC will update the **WO Status** to **Supt Confirmed – Pending Approval** and the approval process for TCHC to approve the final cost will begin. Once the **WO Status** is updated to **Work Completed**, you may submit your invoice for payment in VendorCafe.

- If there are any discrepancies, TCHC staff will provide details under **Technician Notes**, and will update the **WO Status** as follows:
  - If the work is not completed as per scope, **WO Status** will be changed to **Dispute** and the **Reason** will be **Service Dispute**.

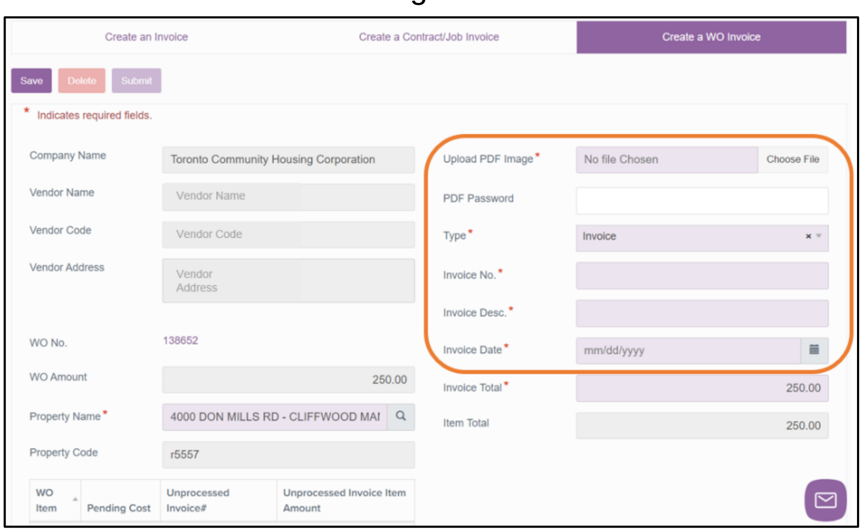
- If the work actual cost is incorrect, **WO Status** will be changed to **Dispute** and the **Reason** will be **WO Price Dispute**.
- If you are required to re-attend the site to complete the work, **WO Status** will be changed to **Re-attend**.

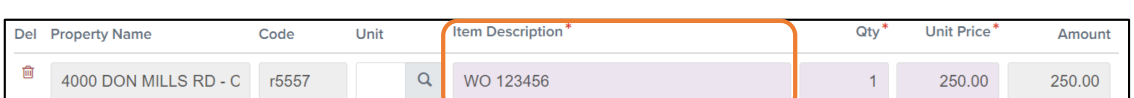
Submitting an Invoice for a Completed Work Order

Any work order that is ready for invoicing will show up on the Work Order Invoicing Tab. This means that the work order has a work completed status, TCHC staff have confirmed the repairs are complete and the final cost has been approved. Once all three of those steps have been taken, then the vendor can submit an invoice. Vendors will also receive an email when a work order is ready to invoice.

1. From the side menu, click **Work Order Invoicing**.
2. The dashboard will show all the work orders that are ready to be submitted for invoicing.
3. Click the **Work Order Number.** The work order will populate on the screen.
4. Scroll down and click on the purple **Create Invoice** button. This will open up the main invoice page to proceed to submit the invoice.
5. The work order number, address and price will prepopulate on the screen based on the work order that you are invoicing for. You are not required to change these fields. Only the following mandatory fields will need to be entered:
   a. Upload a **PDF Image** of the invoice.
   b. Enter the **Invoice No.,** this would the number of your invoice
   c. Enter the **Invoice Desc.,** this can be the property name or WO number.
   d. Enter the **Invoice Date**, enter the date you are submitting the invoice.

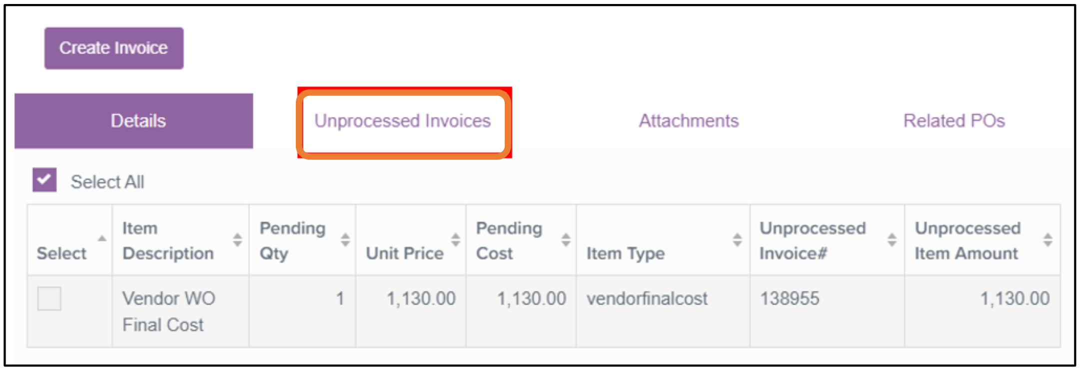
6. When receiving your EFT payment, if you want the EFT Payment Remittance to state which work orders you are receiving payment for, you can update the **Item Description** at the bottom of the invoicing page to show the work order number. If not, the remittance will show your vendor name.
7. Click **Save.** Your invoice information will be saved within the system and cannot be used for any other work orders.The invoice still needs to be submitted in order to be reviewed and paid.
8. Click **Submit.** The invoice will be submitted to TCHC Accounts Payable for processing and you will see a confirmation pop-up indicating it was submitted successfully. Once submitted, the work order will remove from the Work Order Invoicing tab within 15 minutes and show up in Pending Invoices.

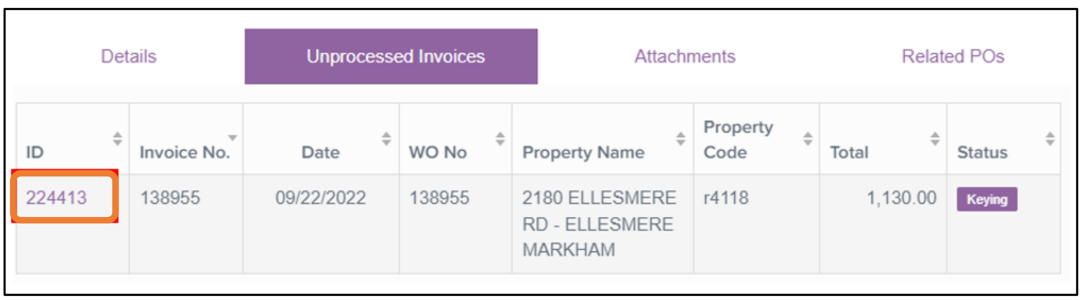




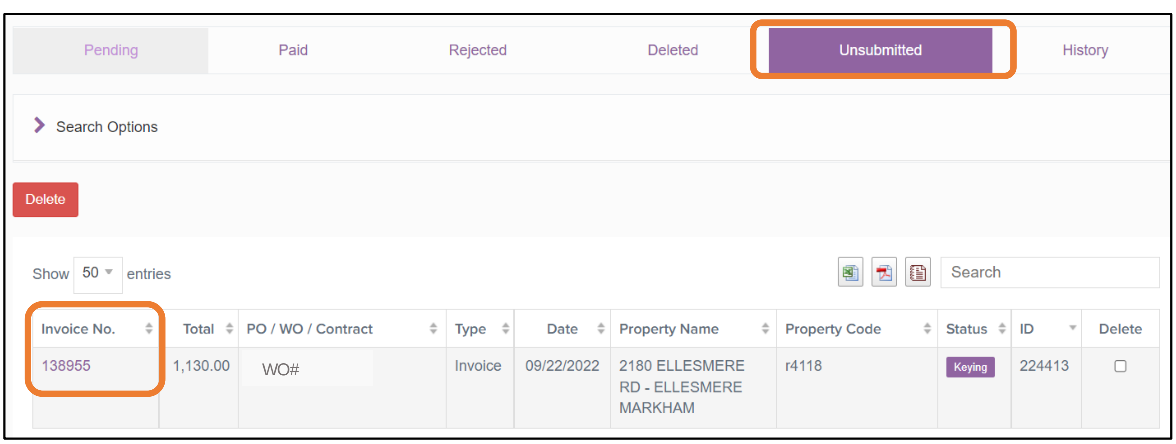
Unprocessed Invoices

If the invoice was only saved and not submitted, the invoicing process will not be complete and the work order will remain on the Work Order Invoicing Tab. If only the Save button was selected, the system will register that the invoice process was started on a work order but it won't allow the user to try and invoice again with the same number. The work order will remain on the Work Order Invoicing page and when opened, it will show an "Unprocessed Invoices" option and the line item with the final price won't be selected. To complete the invoice process, click on the Unprocessed Invoices tab on the work order, then select the Invoice Number. It will open up the Invoice page where you can now submit the invoice. Once submitted, the system may take up to 15 minutes for the work order to disappear from the Work Order Invoicing Page and show up on the Pending Invoices page.



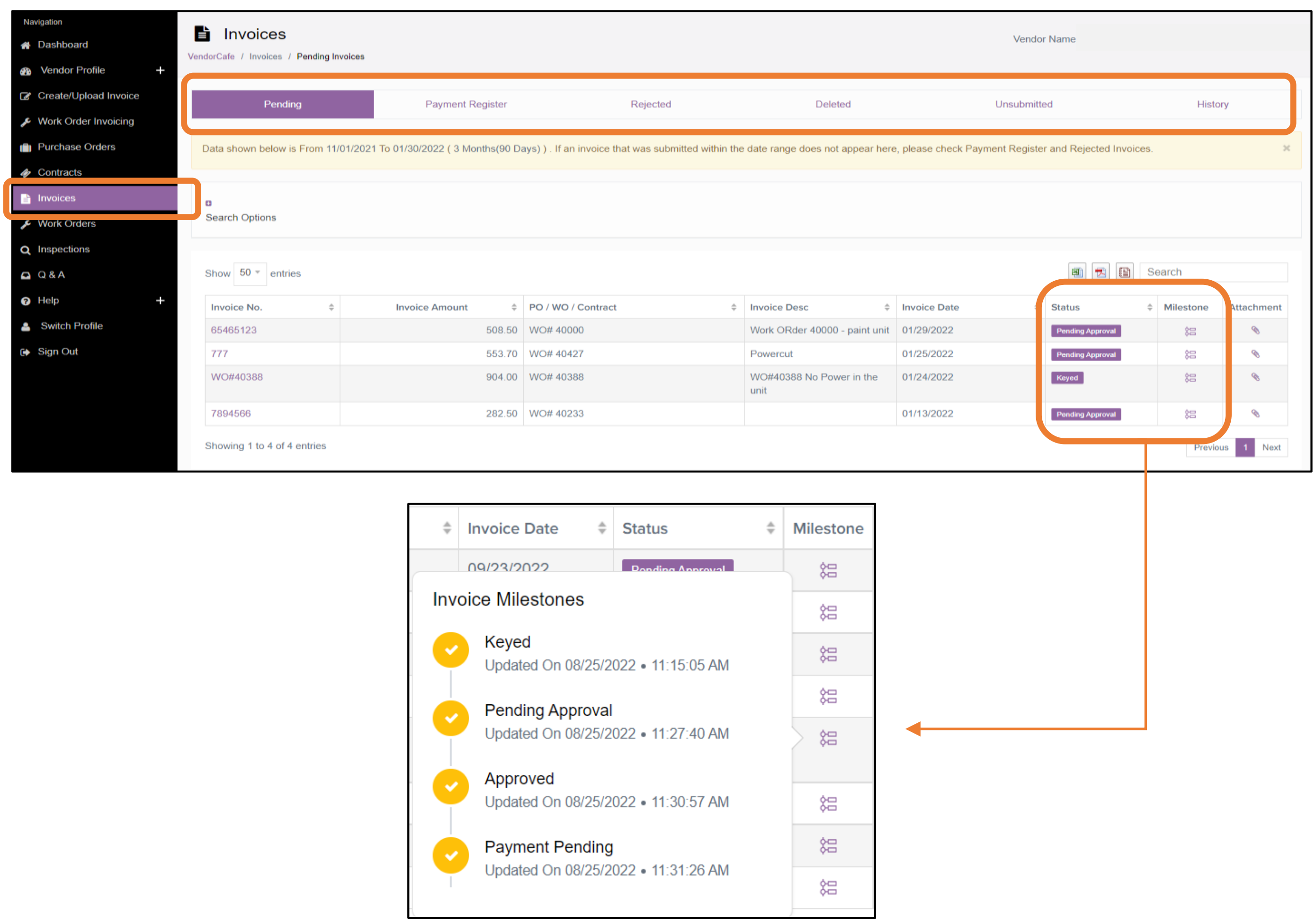


Unsubmitted invoices will also show up on your **Invoices Dashboard** on the **Unsubmitted Tab**. You can also process them by clicking on the invoice number and clicking on the Submit button on the invoice page.



Checking the Status of an Invoice

1. From the side menu, click **Invoices**.
2. Click on the **Pending** or **Payment Register** tab.
   - **Pending:** use this tab to check the **Status** of the invoice.
   - **Keyed:** means that the invoice has been received by TCHC Accounts Payable and entered to start the payment approval process.
   - **Pending Approval:** means that the invoice is in the approval process.
   - **Payment Register:** use this tab to see all invoices that have been paid.
   - **History:** use this tab to see all invoices that are currently being processed.
3. On each of tab, search for the invoice number for which you are checking the status. Enter the invoice number in the **Invoice No.** field or search for the invoice using **Search Options.** Click **Search**.
4. Review the **Status** field for the status of the invoice. Refer to the **Appendix** for a full listing of invoice statuses and what each status means.
5. The **Milestone** column will also provide detailed information relating when and if an invoice has been processed. If you click on the symbol, it will open up a pop up box that will provide the dates and times of each step of the invoice review process.



Appendix

Work Order Statuses (including Reasons)

Work Order Status	What the Status Means	**Notes/Reasons** *All vendor work order status updates should include Vendor Notes.*
Accepted	You have agreed to complete the work order.	The vendor updates the work order with this status.
Canceled	The work order has been cancelled by TCHC.	The vendor does not have access to use this status. The Reason field will be completed by TCHC to indicate the reason for the cancellation.
Dispute	TCHC has identified a discrepancy with the repairs completed or the final cost amount submitted.	The vendor does not have access to use this status. The Reason field will be completed by TCHC to indicate the nature of the dispute.
NOE Delivered	Building staff have delivered the NOE to the tenant, and you can proceed to attend to the unit at the scheduled time as noted on the NOE.	This status is automatically updated when the NOE is generated and delivered by Building staff.
NOE Required	You require an NOE to be delivered to the tenant. The “Onsite Scheduled Date” also needs to be completed used when using this status.	The vendor updates the work order with this status if an NOE is required.
On Hold	The work order has been put on hold. If the work order is on hold and the price escalation has been rejected, proceed with the original scope of work. If the work order is on hold and a schedule date is required, you are to enter in a schedule date (when you will be on site).	The vendor or TCHC updates the work order with this status. The Reason field must be completed by the person putting the work on hold to explain why the work order is on hold.
Onsite	You are currently onsite.	The vendor updates the work order with this status.
Price Escalation Approved	Your price escalation request has been approved. You can proceed with the repairs submitted.	This status is automatically updated when the price escalation is approved by TCHC.

Work Order Status	What the Status Means	Notes/Reasons *All vendor work order status updates should include Vendor Notes.*
Price Escalation Requested	Price Escalation has been review and sent to the appropriate approver for review.	TCHC will update the work order to this status once the approval process has been initiated.
Reattend	You are required to re-attend due to a dispute with the repairs completed.	TCHC will update the work order with this status if the vendor is required to re-attend the site.
Redispute	TCHC staff have identified a discrepancy with the repairs completed or the final cost submitted.	The vendor does not have access to use this status. The Reason field will be completed by TCHC to indicate the nature of the dispute.
Scheduled	The work order has been assigned to you. This will be the status that the work order starts at when it is assigned to the vendor.	This status is automatically updated.
Supt Confirmed – Pending Appr	TCHC staff have inspected the work and the final cost is in the process of being approved.	TCHC updates the work order with this status after they have inspected the work completed by the vendor and no issues have been identified.
Vendor Completed – Pending Conf	You have completed the work.	The vendor updates the work order with this status.
Work Completed	The final cost has been approved by TCHC and you can submit your invoice in VendorCafe.	This status is automatically updated when the final cost has been approved by TCHC.

Invoice Statuses

Invoice Status	What the Status Means
Keyed	The invoice is created, submitted and enter into TCHC's system.
Pending Approval	The invoice is in process of TCHC Approval.
Approved	TCHC has approved the invoice for posting and payment.
Payment Pending	TCHC has posted the invoice and it will be released for payment in the next payment release.
Keying	The invoice has been saved, but not fully submitted to TCHC. You are able to add lines, submit or delete and start a new invoice, if necessary. However, you cannot edit any lines that have already been saved.
Paid	The invoices has been processed and is fully paid.
Rejected	TCHC has rejected the invoice in their system, and the reason for the rejection should be noted. You can submit a revised invoice or credit.
Keyed	The invoice has been keyed and submitted to TCHC for processing.
Busy	The TCHC system is busy. The invoice will continue to submit until the system is available. No action is needed from you.
Processed	The invoice was successfully sent to TCHC.