Attachment A:

Vendor Quick Reference Instructions

https://des.diversitycompliance.com/

Vendor Registration

Account Lookup and Creating New Account

Navigation: System Access Login Screen → Account Lookup

- Enter search parameters (Business Name, Tax ID, Contract Person, Email, Phone/Fax, Address) and click **Search**
  - If vendor found, please check that the contact information is accurate and if not, correct accordingly.
- If vendor not found in the search results, click the **Customer Support** link located at the top of the page.
- Complete the information (Company Name, Your Name, Email, Phone/Fax, Message Subject and Message) and click **Submit**
- B2GNow customer support will contact you via email to gather more information and set up your account.

Forgot My Username (if account currently exists but you forgot your username)

Navigation: System Access Login Screen → Contact Us & Support
- Click on the Customer Service **Contact Us** link
- Complete the information (Company Name, Your Name, Email, Phone/Fax, Message Subject and Message) and click **Submit**
- B2GNow customer support will contact you via email with your username

Forgot My Password or Change My Password (if account currently exists but you forgot your password, or need to change it)

Forgot My Password

Navigation: System Access Login Screen → Forgot Password

- Enter email address, username or user number in the field and click Submit
- An email will be sent to you within minutes containing a one-time password. You will be required to reset your password after login.

Change My Password

Navigation: Home Screen → Settings → Change Your Password

- Enter old password
- Enter new password

Add Subcontractors and Prime/Subcontractor Payments

Adding Subcontractors to a Contract

Left Hand Navigation Bar: From the Home Screen, click on View and then My Contracts

Vendor Information Section

> **Highlighted** text is newly added, or changed, information.

- Click on **View** in the Actions column to open the contract
- Click on the **Subcontractors** tab
- Click on **Add First Tier Subcontractor**
- Click on **Get Vendor**
    - o In the **Get Vendor** search screen, enter in search data and click **Search All Matches.** If vendor found, then click on **Select Vendor**
    - o If Vendor not found, see **Create a Subcontractor/Supplier** section below
- If only one **Contact** exists, system will default the contact. If more than one exists, choose the correct one from the dropdown list.
- If only one **Address** exists**,** system will default the address. If more than one exists, choose the correct one from the dropdown list.

Applicable Vendor Certification Section

- Click on the **Assign Vendor and click to refresh certification list** to see what current certification the subcontractor/supplier has.

Subcontractor Information Section

Enter in the following fields:

- **Subcontract Percent/Amount**
- **Include in Compliance Audits?** Choose the appropriate response
- **Count Towards Certified Goals?** Choose the appropriate goal <mark>type based on what is listed in the Applicable Vendor Certification section (MBE, WBE, MWBE, VA or SBE). You can only choose one goal type for that sub/supplier for a contract.</mark>
- **Type of Participation** – choose the appropriate response
- **Work Description**
- **Subcontract Award/Commit Date**
- **Estimated Work Start Date**
- **Estimated Work End Date**
- **Add vendor to existing audits for this contract** – choose the appropriate response
- **Comments**

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Click on **Review** - review the record and if need to make changes, click Edit. To save the record, click Save.

Create a Subcontractor/Supplier

Navigation: <mark>From the Home Screen, click on View and then My Contracts</mark>

- <mark>Click on **View** in the Actions column to open the contract</mark>
- <mark>Click on the **Subcontractors** tab</mark>
- <mark>Click on **Add First Tier Subcontractor**</mark>
- <mark>Click on **Get Vendor**</mark>
- Enter Search Criteria and click on **Search All Matches**
- If Subcontractor/Supplier not found in the search results, click **Add New Vendor** and enter the following fields:
  - **Business Information**
    - Enter in the **Business Name**
    - Enter in the **DBA,** if applicable
    - Enter in the **Tax ID Number**
    - Do not need to enter the **Company Type** leave as **None Selected**
    - Do not need to enter the **Company Ownership Ethnicity** leave as **None Selected**
    - Do not need to enter the **Company Ownership Gender** leave as **None Selected**
  - **Business Contact Information**

- Enter in the **Main Company Email**
- Enter in the **Main Phone**
- Enter in the **Main Company Website**, if available
- Enter in the **Company Address**
- Enter in the **Company City**
- Enter in the **Company State**
- Enter in the **Company Zip code**
  - o **Company Contact Person**
    - Enter in the **Name** (first, last name)
    - Enter in the **Title**, if available
    - Enter in the **Email (Username)**
    - Enter in the **Phone Number,** if different from Main Phone
    - Enter in the **Time Zone**

Click on Review. When you click **Review,** the system will check the vendor database to ensure that an existing record doesn't already exist. You may be presented with a yellow alert which means the system identified a 'soft match' based on similar information. If the vendor account is actually different, then you can click **Save the New Vendor Record**. If you think the vendor is the same, click on View Vendor to access the existing vendor record to make any necessary updates to address, users, contact information, etc.

If you encounter a red alert, that means the system identified a 'hard match' which is typically based on tax id and/or vendor reference numbers (UBI). The system will not allow you to save the new vendor record. Click on **View Vendor** to access the existing vendor record to make any necessary updates to address, users, contact information, etc.

Click on **Save**. Click on Return to Subcontract. Complete the following information about the subcontractor.

Applicable Vendor Certification Section

- Click on the **Assign Vendor and click to refresh certification list** to see what current certification the subcontractor/supplier has.
  - o If adding a new sub/supplier that has no certifications in the system, the message will read "no applicable certifications".

Highlighted text is newly added, or changed, information.

Subcontractor Information Section

- Enter in the following fields:
  - o **Subcontract Percent/Amount**
  - o **Include in Compliance Audits?** Choose the appropriate response

- Count Towards Certified Goals? Choose the appropriate goal type based on what is listed in the Applicable Vendor Certification section (MBE, WBE, MWBE, VA or SBE). You can only choose one goal type for that sub/supplier for a contract.
- Type of Participation: choose the appropriate response
- Work Description
- Subcontract Award/Commit Date
- Estimated Work Start Date
- Estimated Work End Date
- Add vendor to existing audits for this contract: choose the appropriate response
- Comments

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Adding Payments Made to Prime Contractor

Left Hand Navigation Bar: From the Home Screen, click on View and then My Contracts or Search and then enter the Contract Number

- Click on **View** in the Actions column to open the contract
- Click on **View Contract** in the Contract Status & Actions container
- Click on **Compliance Audit List** tab
- Click **View Audit** for the period you want to enter the payment
- In the **Payment to Prime** field, click **Submit**
- Enter the following fields:
  - **Payment Amount**
    - If no payment was received for that audit period, **enter 0.00**
  - **Payment Date**
    - If no payment was received for that audit period, **enter today's date**
  - **Comment – enter in the invoice number(s)**
    - If no payment was received for that audit period, **enter "no payment received"**

Click **Save.**

Adding Payments Made to Subcontractor/Supplier

Left Hand Navigation Bar: From the Home Screen, click on View and then My Contracts Search and then enter the Contract Number

- Click on **View** in the Actions column to open the contract
- Click on **View Contract** in the Contract Status & Actions container

- Click on **Compliance Audit List** tab
- Click **View Audit** for the period you want to enter the payment(s)
- Above the subcontractor list located at the bottom of the audit page, click **Submit ALL Incomplete Records**
- Enter the following fields:
  - **Amount Paid**
    - If no payment was paid to the sub for that audit period, **enter 0.00**
  - **Payment Date**
    - If no payment was paid to the sub for that audit period, **enter today's date**
  - **Prompt Payment** (yes/no)?
    - If no payment was paid to the sub for that audit period**, select No**
  - **Payment Detail**
    - If no payment was paid to the sub for that audit period, **enter 'no payment paid'**

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Click Save.