B2GNOW Software for Government

Staff User Manual

Chapter 2 – Vendor Management

Published in the United States by B2Gnow/AskReply, Inc.
www.B2Gnow.com

Printed in the United States of America
Third Edition

Chapter 2. Vendor Management

Chapter 2 – Vendor Management

The system contains thousands of registered vendors. Each vendor account contains information about the vendor's business, including contact information, certification status, and contract/concession participation. The vendor database includes:

- Certified firms.
- Self-registered firms.
- Staff-created firms.
- Vendor records imported from your financial system (if applicable).

All vendors are part of the master vendor database. They can be all, none, or any combination of certified firms, prime contractors, subcontractors, and concessions vendors. You create relationships and populate your organization's vendor database when you contract with or certify vendors.

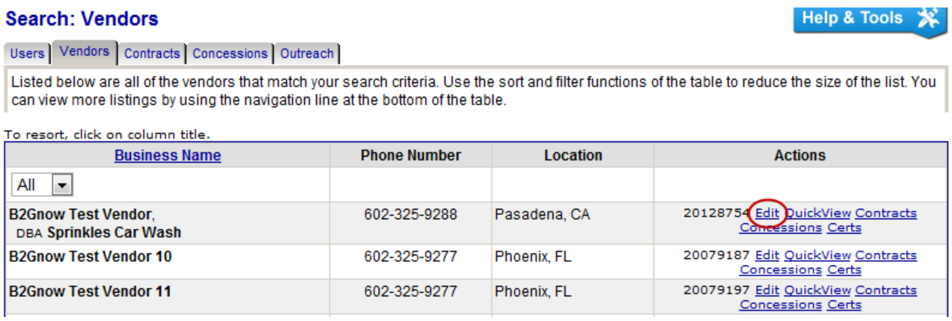
TIP:	When searching for vendors, you can search the master database or organization database, depending on the situation.

Accessing vendor accounts

You can perform a search to locate the vendor whose information you want to view.

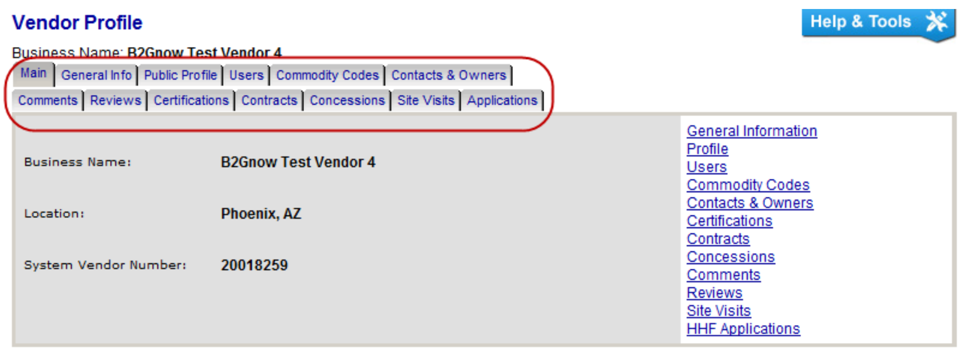
To search for a vendor and view vendor information

1. From the navigation menu, click **Search**.
2. Click **Vendors**.
3. Enter the search parameter(s).
4. Click **Search First 20 Matches** or **Search All Matches**.
5. In the search results, access vendor information by clicking **Edit**.



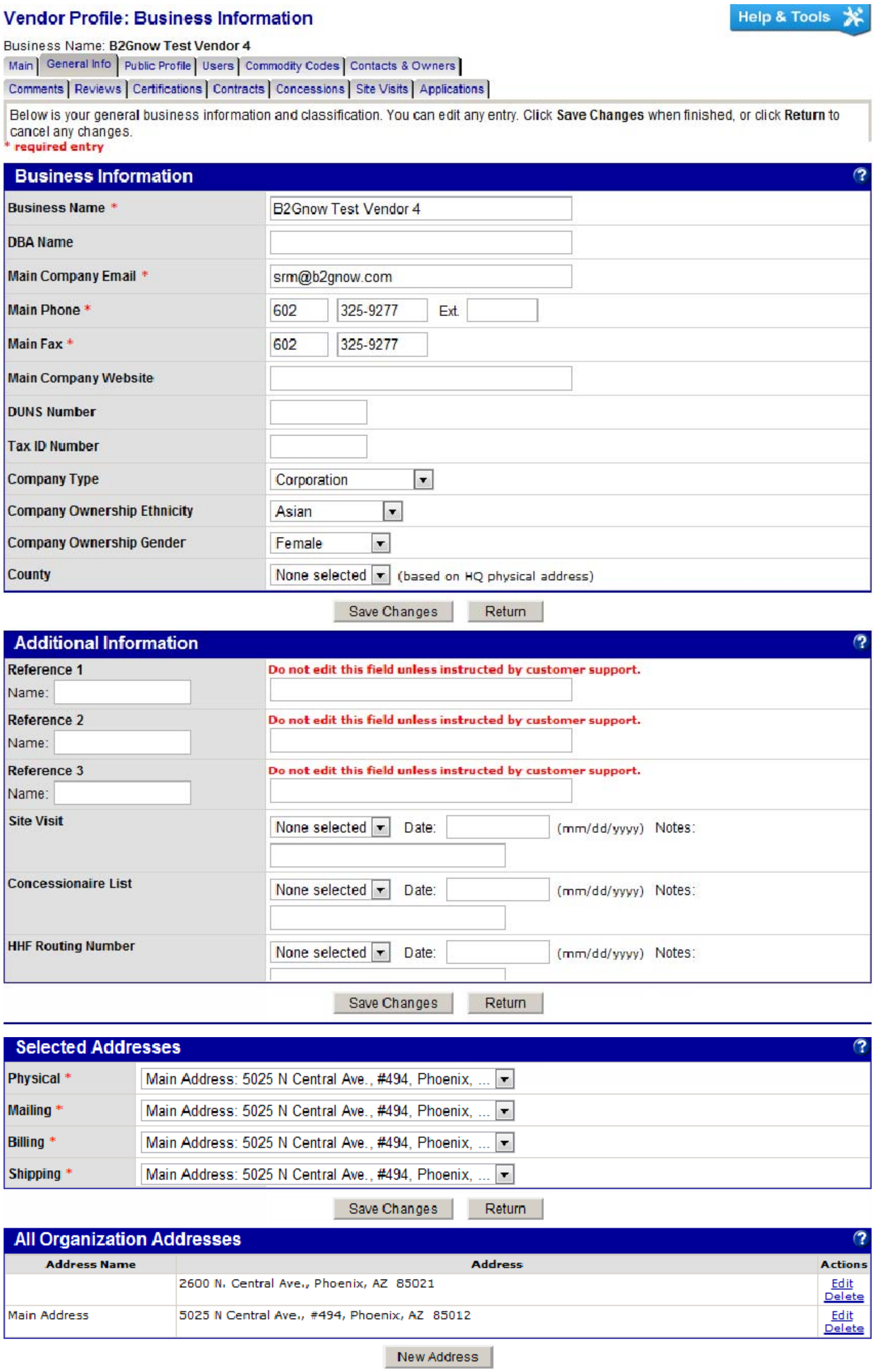
Understanding the Vendor Profile

From the Vendor Profile, you can manage vendor information. Each tab is an editable section of the vendor record. Click the tabs to navigate through the complete profile.



Viewing General Information

In the following example, view general business information and classifications and edit any entry. If editing, click **Save Changes** to save your edits or click **Return** to cancel your edits.



Vendor Profile: Business Information

Help & Tools

Business Name: **B2Gnow Test Vendor 4**

Main | General Info | Public Profile | Users | Commodity Codes | Contacts & Owners |

Comments | Reviews | Certifications | Contracts | Concessions | Site Visits | Applications |

Below is your general business information and classification. You can edit any entry. Click **Save Changes** when finished, or click **Return** to cancel any changes.

* required entry

Business Information

Business Name *	B2Gnow Test Vendor 4
DBA Name	
Main Company Email *	srm@b2gnow.com
Main Phone *	602 325-9277 Ext.
Main Fax *	602 325-9277
Main Company Website	
DUNS Number	
Tax ID Number	
Company Type	Corporation
Company Ownership Ethnicity	Asian
Company Ownership Gender	Female
County	None selected (based on HQ physical address)

Save Changes Return

Additional Information

Reference 1 Name:	Do not edit this field unless instructed by customer support.
Reference 2 Name:	Do not edit this field unless instructed by customer support.
Reference 3 Name:	Do not edit this field unless instructed by customer support.
Site Visit	None selected Date: (mm/dd/yyyy) Notes:
Concessionaire List	None selected Date: (mm/dd/yyyy) Notes:
HHF Routing Number	None selected Date: (mm/dd/yyyy) Notes:

Save Changes Return

Selected Addresses

Physical *	Main Address: 5025 N Central Ave., #494, Phoenix, ...
Mailing *	Main Address: 5025 N Central Ave., #494, Phoenix, ...
Billing *	Main Address: 5025 N Central Ave., #494, Phoenix, ...
Shipping *	Main Address: 5025 N Central Ave., #494, Phoenix, ...

Save Changes Return

All Organization Addresses

Address Name	Address	Actions
	2600 N. Central Ave., Phoenix, AZ 85021	Edit Delete
Main Address	5025 N Central Ave., #494, Phoenix, AZ 85012	Edit Delete

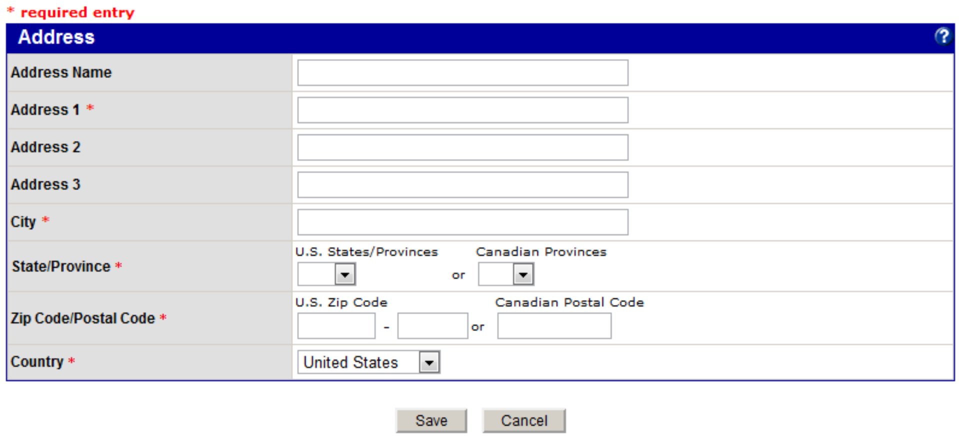
New Address

Adding addresses

You can add addresses from the Vendor Profile: General Information page.

To add addresses

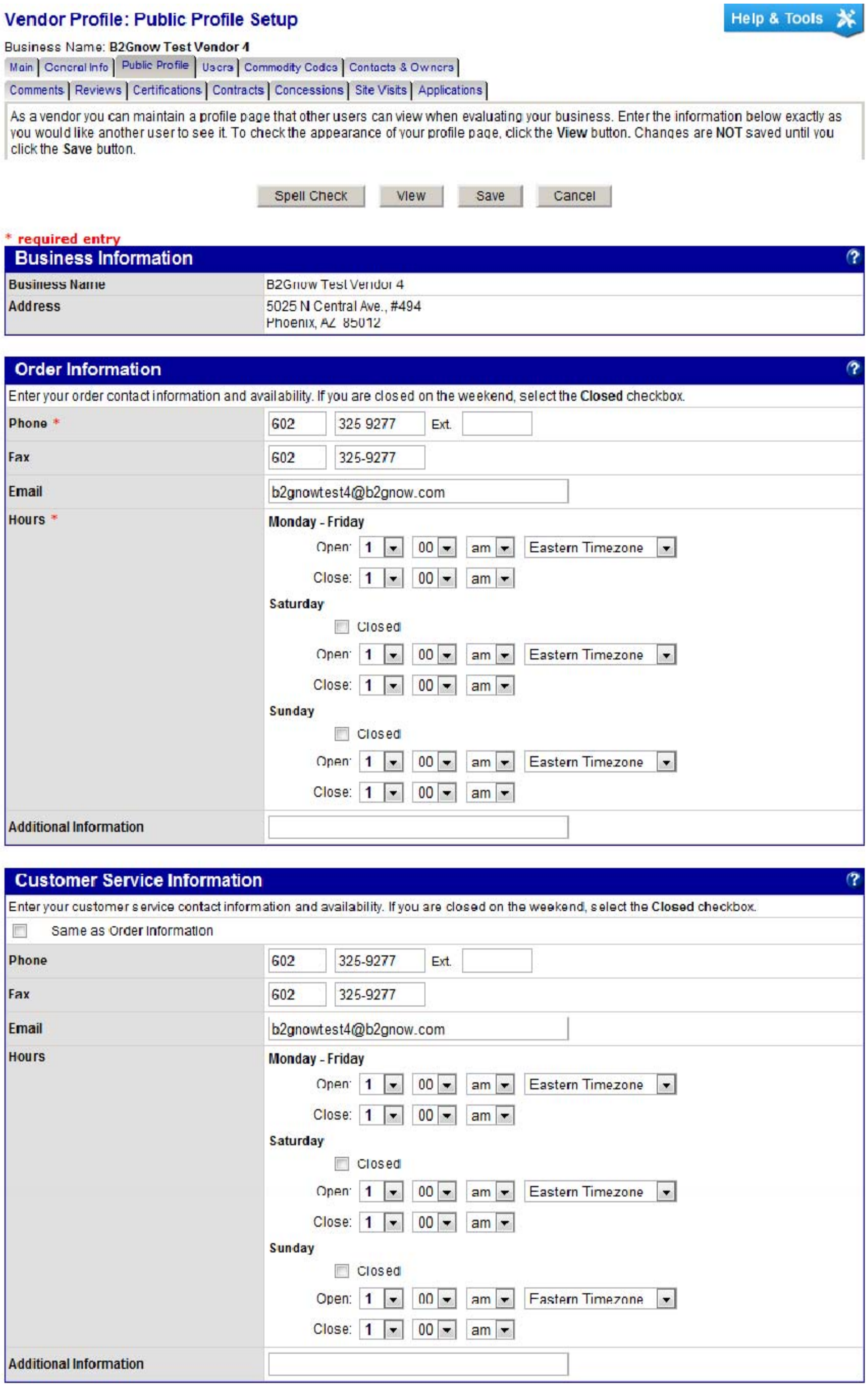
1. Click **New Address**.
2. Enter the address information.



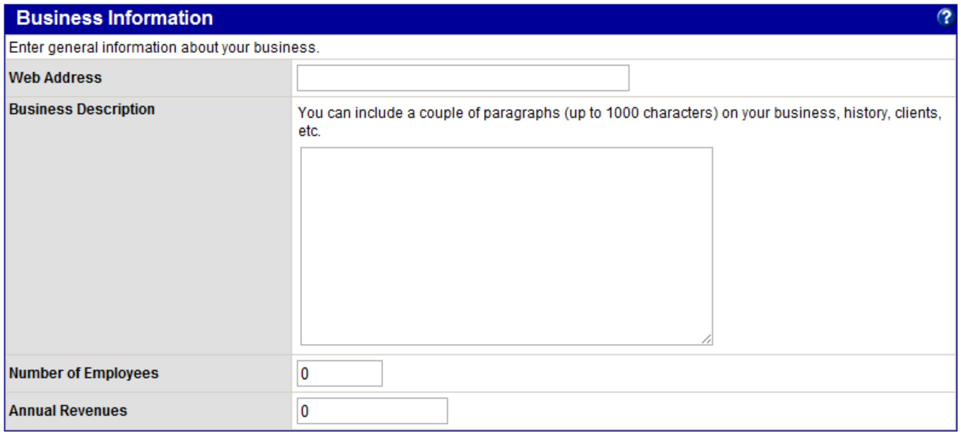
3. Click **Save**.
   The Vendor Profile: Business Information page displays.
4. In the **Selected Addresses** box, assign the address as a default, if necessary.
5. Click **Save Changes**.

Viewing profiles

Vendors can maintain a profile page that other users can use to evaluate the business. Vendors can add business and contact information, vendor licenses, and payment and delivery options.



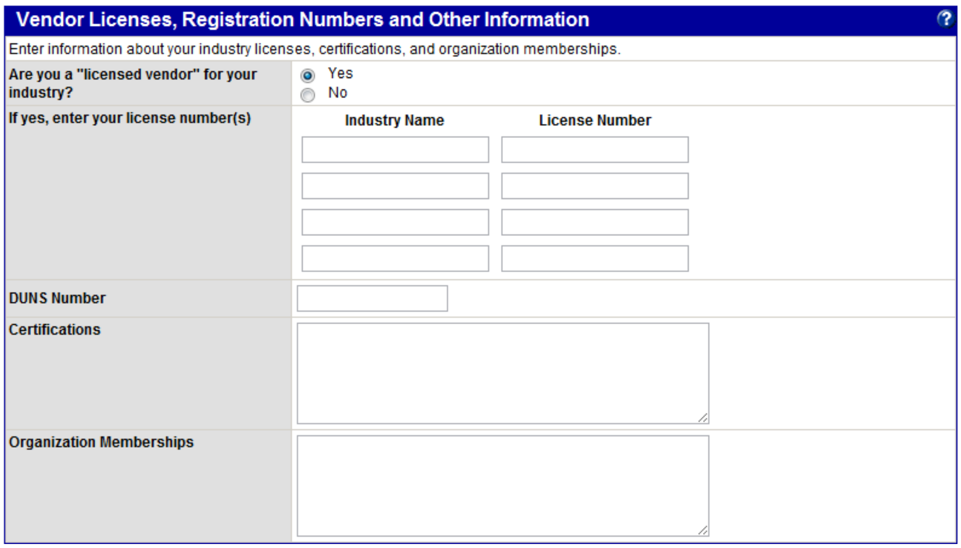
- **Order Information**. Displays information about the vendor, such as the vendor's general business hours.
- **Customer Service Information**. Displays information customers can use to contact the vendor, such as the Customer Service phone numbers.



Business Information

Enter general information about your business.

Web Address	
Business Description	You can include a couple of paragraphs (up to 1000 characters) on your business, history, clients, etc.
Number of Employees	0
Annual Revenues	0

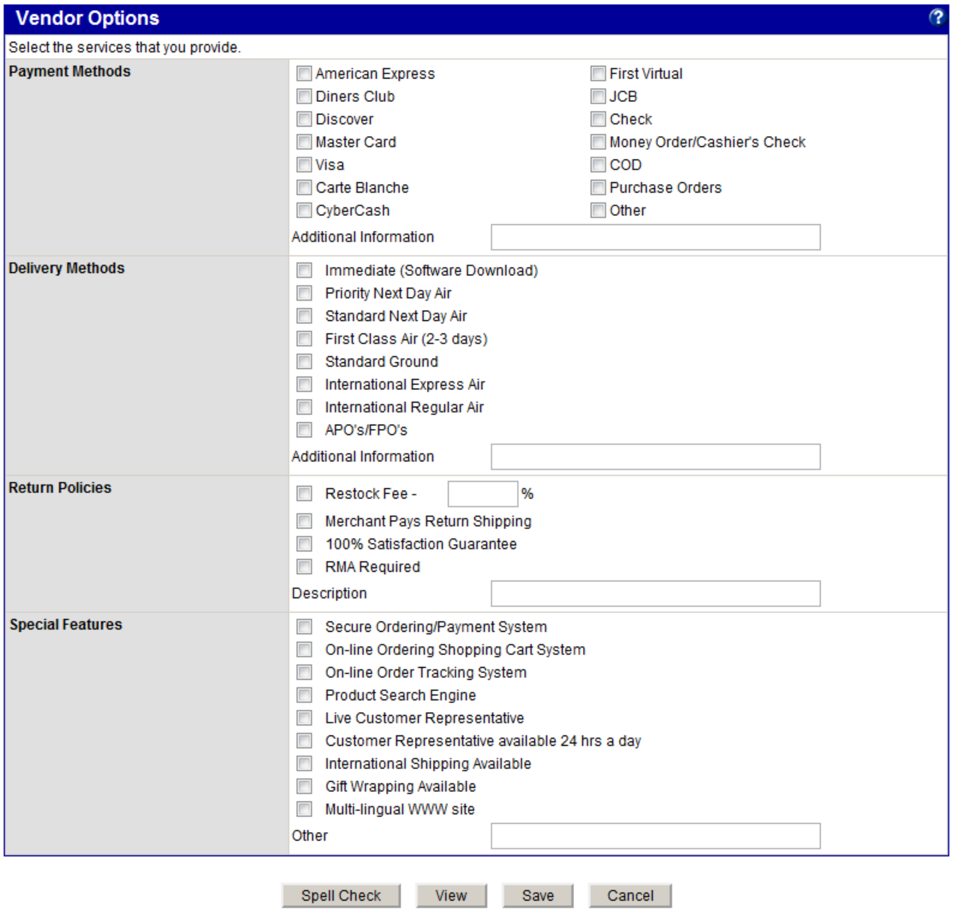


Vendor Licenses, Registration Numbers and Other Information

Enter information about your industry licenses, certifications, and organization memberships.

Are you a "licensed vendor" for your industry?	Yes No
If yes, enter your license number(s)	Industry Name / License Number
DUNS Number	
Certifications	
Organization Memberships	

- **Business Information**. Displays information about the vendor's business, such as the vendor's Web site address, a vendor description, number of employees, and annual revenues.
- **Vendor Licenses**. Lists industry information, such as industry licenses, certifications, and organization memberships.



- **Vendor Options**. Displays a checklist of vendor options, such as payment methods, delivery methods, and return policies.

Working with users

You can view a list of all user accounts for the business. Vendors can add an unlimited number of active users. You can add, edit, or delete users.

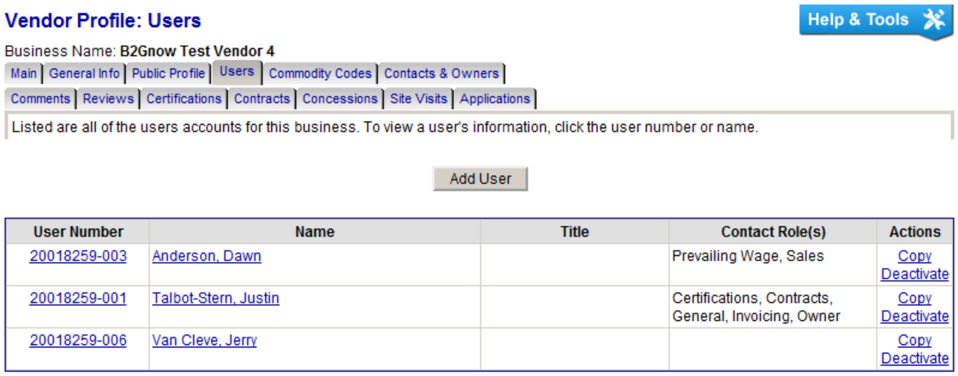
Adding users

You can add users from the Vendor Profile: Users page.

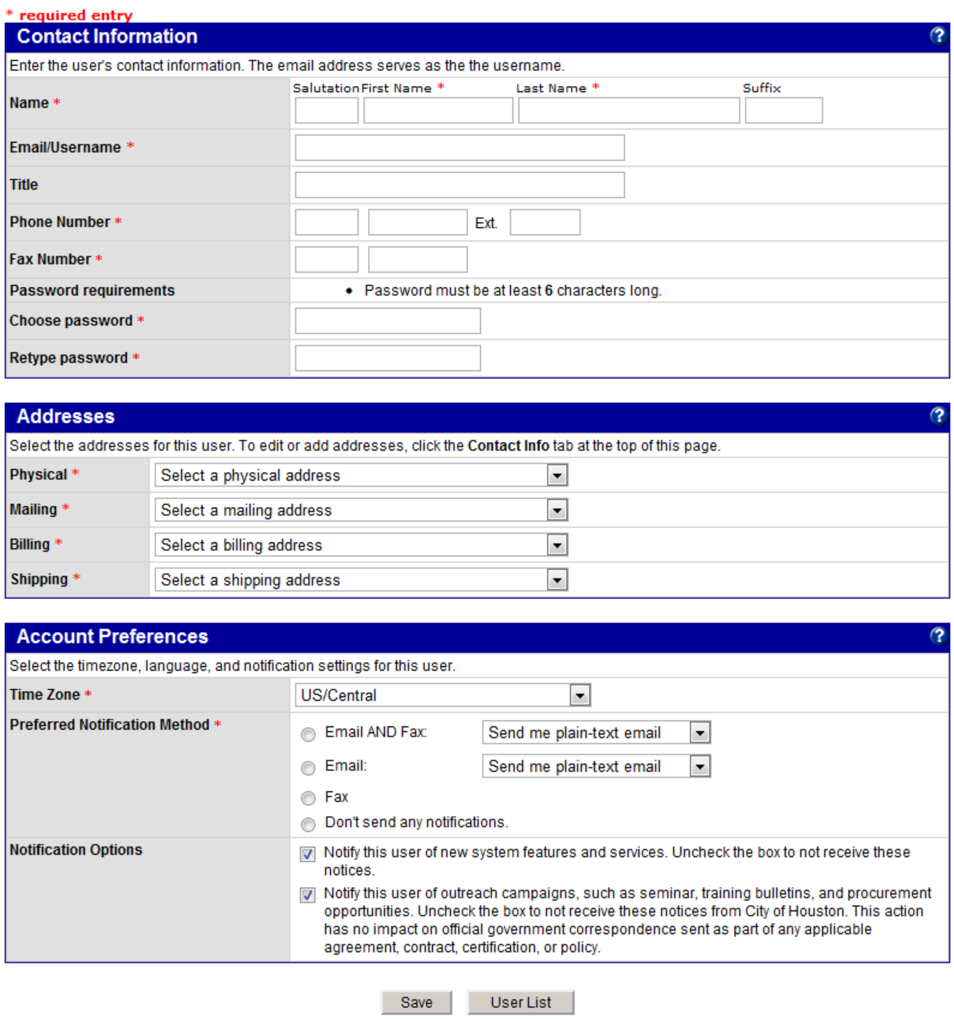
To add a user

1. To access the Vendor Profile: Users page, search for and open the vendor's profile, and then click the **Users** tab.

2. Click **Add User**.



3. Enter user information.



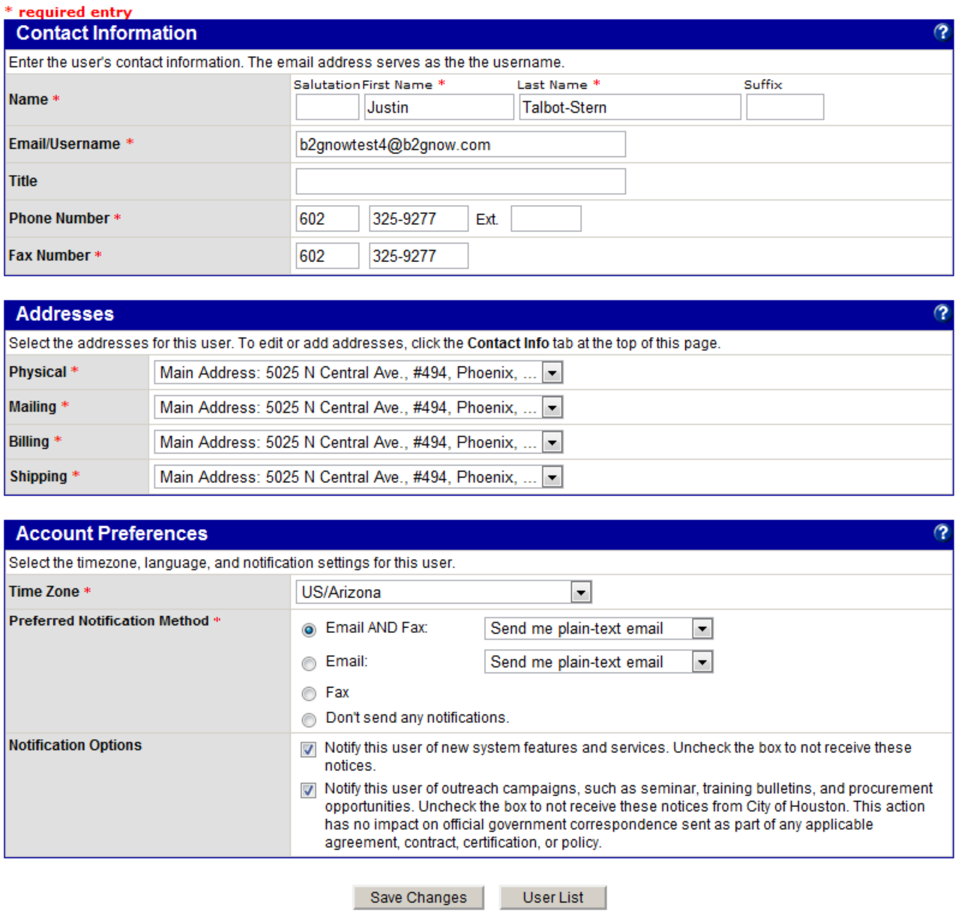
4. Click **Save**.

Editing users

You can edit user information from the Vendor Profile: Users page.

To edit user information

1. To access the Vendor Profile: Users page, search for and open the vendor's profile, and then click the **Users** tab.
2. Click the user's name.
3. Make your changes on the user profile.



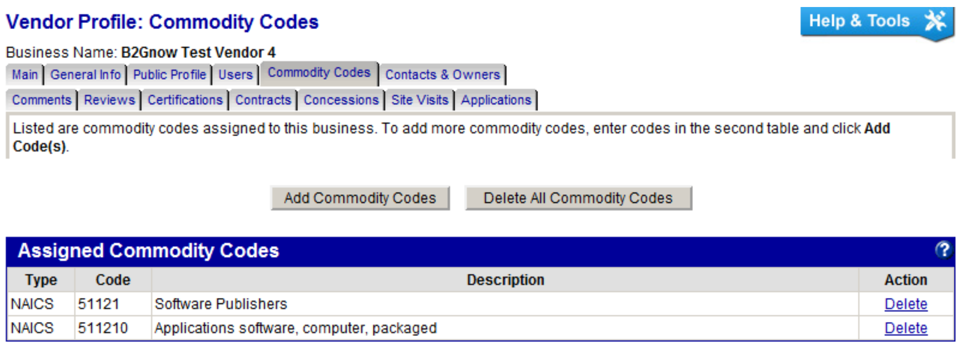
4. Click **Save Changes**.

Deleting users

Vendor users are assigned to different record types in the system. To ensure that your transactions always have a valid point of contact, you must contact Customer Support to delete a vendor user. The support team will review the user assignments and process the account deletion.

Working with commodity codes

You can view a vendor's commodity codes on the Vendor Profile: Commodity Codes page.

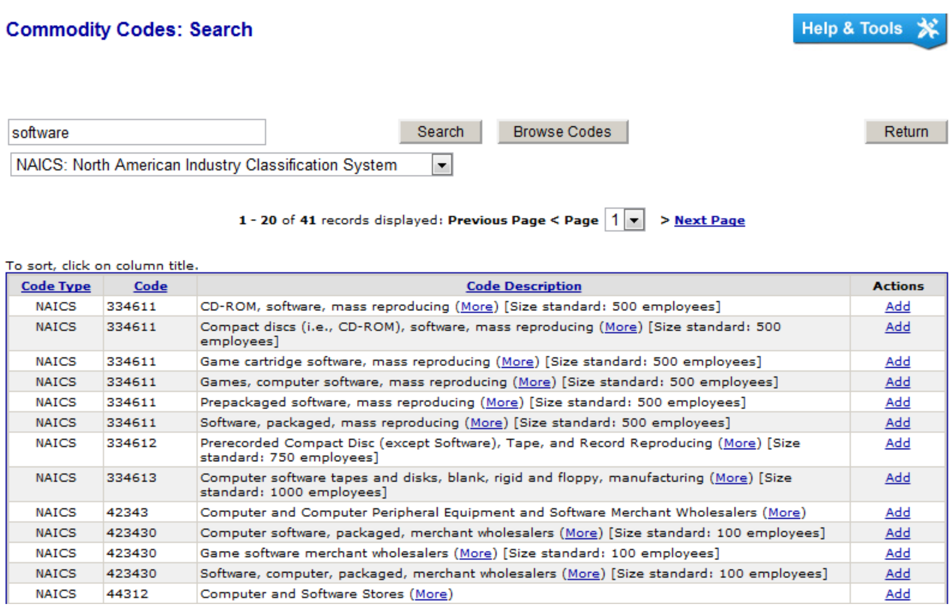


Adding a commodity code to the vendor profile

You can add commodity codes to a vendor's profile from the Vendor Console: Commodity Codes page.

To add a commodity code to the vendor's profile

1. To access the Vendor Profile: Commodity Codes page, search for and open the vendor's profile, and then click the **Commodity Codes** tab.
2. Click **Add Commodity Codes**.
3. Search for and locate the code you want to add.



4. Click **Add**.
5. Click **OK** to confirm you want to add the code.
6. Click **Return** to view the list of assigned commodity codes.

Working with contacts and owners

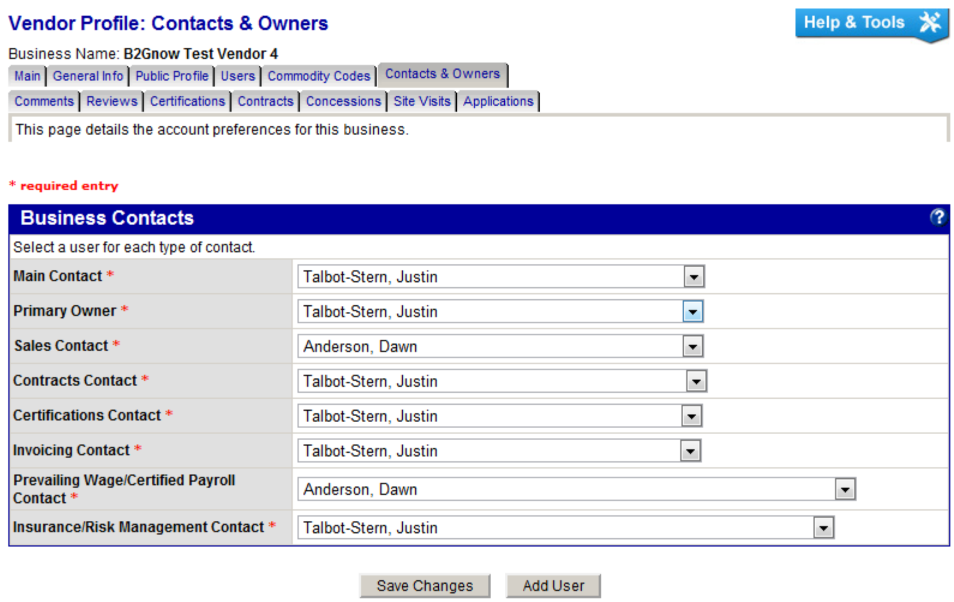
You can view a list of the business primary contacts and owners on the Vendor Profile: Contacts & Owners page.

Changing the contact for a company account

You can change a vendor's contact information on the Vendor Profile: Contacts & Owners page.

To change a company's contact

1. To access the Vendor Profile: Contacts & Owners page, search for and open the vendor's profile, and then click the **Contacts & Owners** tab.
2. In the **Business Contacts** box, select the contact from the list.



3. Click **Save Changes**.

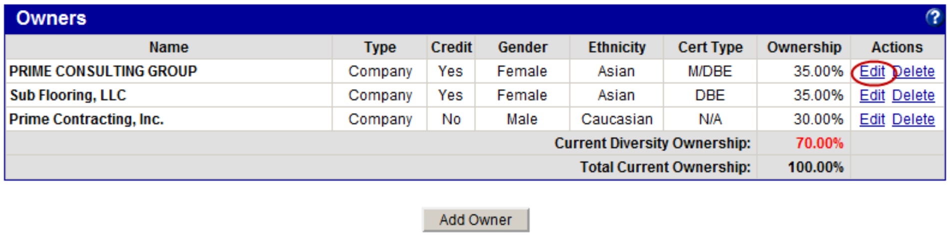
Editing owners of a firm

You can change the firm's owner on the Vendor Profile: Contacts & Owners page.

To change a firm's owners

1. To access the Vendor Profile: Contacts & Owners page, search for and open the vendor's profile, and then click the **Contacts & Owners** tab.
2. View the **Owners** box to see owners currently assigned to this firm.

3. In the **Actions** column, click the **Edit** hyperlink for the owner you want to change.



Owners

Name	Type	Credit	Gender	Ethnicity	Cert Type	Ownership	Actions
PRIME CONSULTING GROUP	Company	Yes	Female	Asian	M/DBE	35.00%	Edit Delete
Sub Flooring, LLC	Company	Yes	Female	Asian	DBE	35.00%	Edit Delete
Prime Contracting, Inc.	Company	No	Male	Caucasian	N/A	30.00%	Edit Delete
					Current Diversity Ownership:	70.00%	
					Total Current Ownership:	100.00%	

4. Update the information.
5. Click **Save** to complete.

Understanding certifications

You can view certification information for vendors on the Vendor Profile: Certifications page. To view a certification, you can click the **View** hyperlink for the certification for which you want to view details. For more information about the certification process, see Chapter 6: Certifications.

Current Certifications

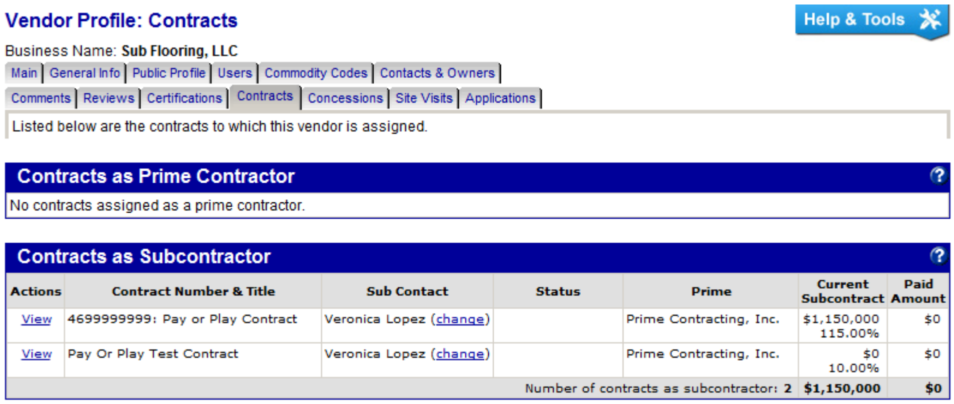
Type	Action	Effective	Renewal	Expiration	Organization	Reviewer	Actions
DBE	New	9/10/2012	9/30/2013	9/30/2015	City of Houston	Houston Admin1	View Edit

Pending/In Process Certifications

Type	Action	Application Date	Organization	Reviewer	Actions
MBE	New	9/11/2012	City of Houston	Houston Admin1	Process

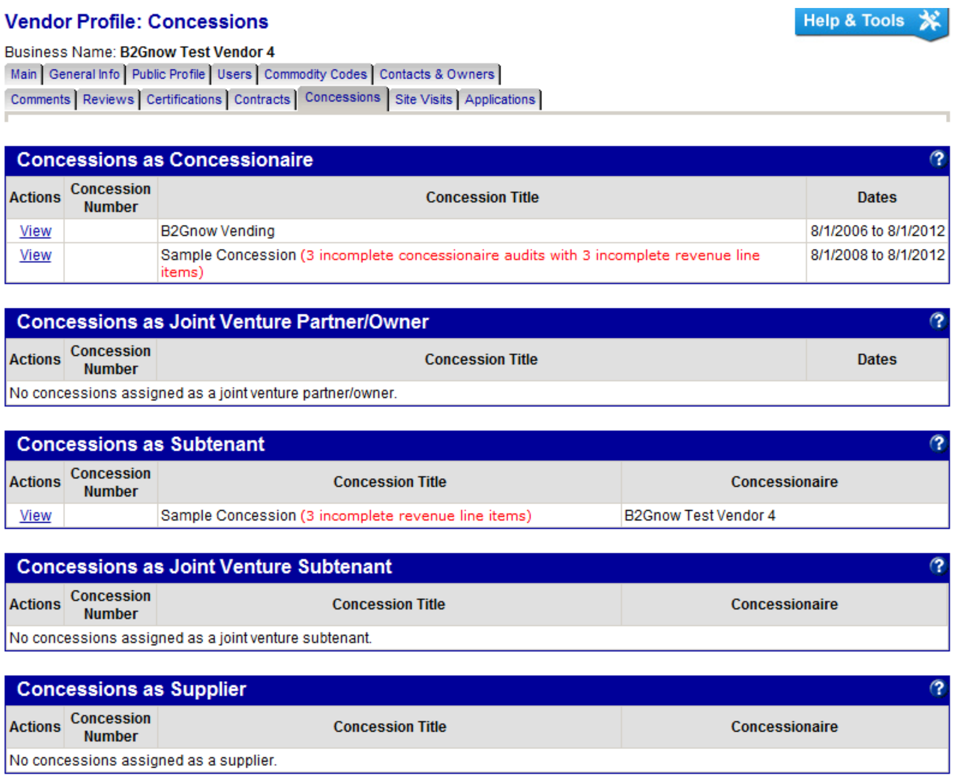
Understanding contracts

You can view a firm's contracts as both Prime Contractor and Subcontractor on the Vendor Profile: Contracts page. You can click the **View** hyperlink to view information about a contract. For more information about contracts, see Chapter 3: Contracts.



Understanding concessions

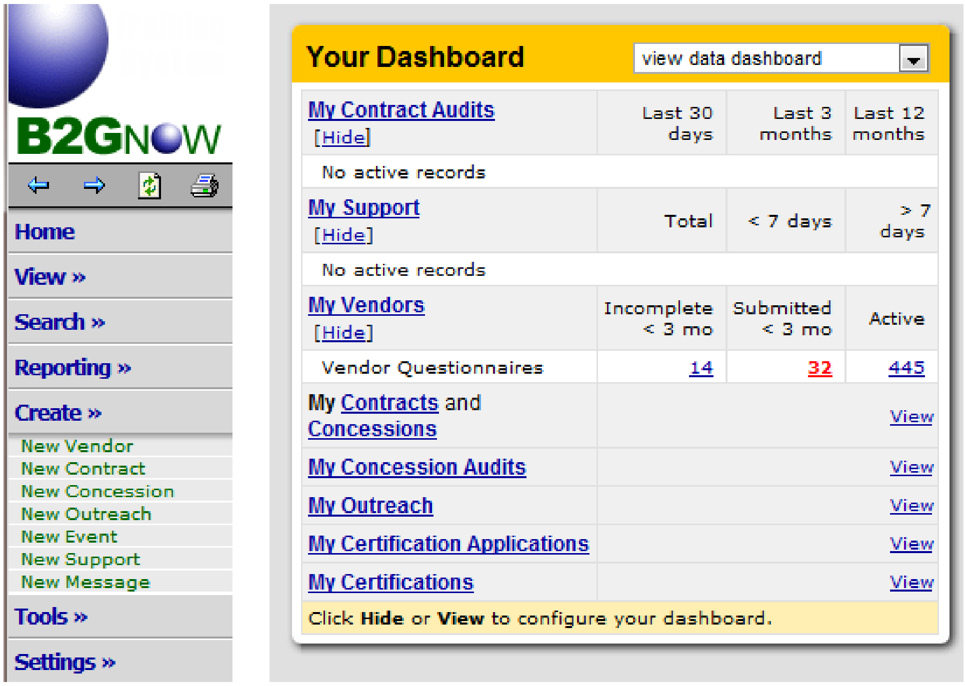
You can view a firm's concessions on the Vendor Profile: Concessions page. You can view information about a concession by clicking the **View** hyperlink for the concession. For more information about concessions, see Chapter 4: Concessions.



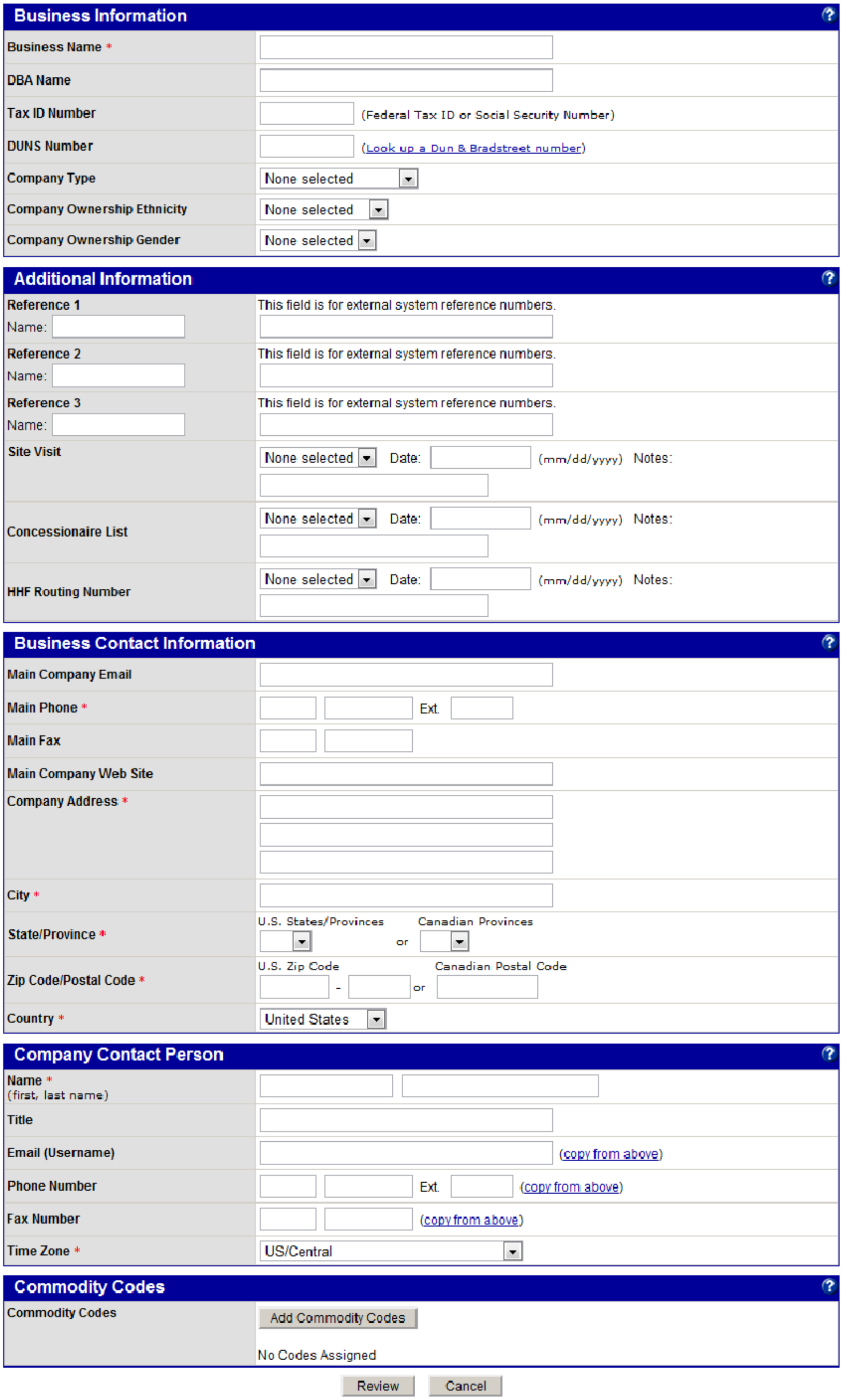
Adding vendors

To add a vendor

1. From the navigation menu, click **Create**.
2. Click **New Vendor**.



3. Complete the Vendor Registration form.



Business Information

Business Name *	
DBA Name	
Tax ID Number	(Federal Tax ID or Social Security Number)
DUNS Number	(Look up a Dun & Bradstreet number)
Company Type	None selected
Company Ownership Ethnicity	None selected
Company Ownership Gender	None selected

Additional Information

Reference 1 Name:	This field is for external system reference numbers.
Reference 2 Name:	This field is for external system reference numbers.
Reference 3 Name:	This field is for external system reference numbers.
Site Visit	None selected Date: (mm/dd/yyyy) Notes:
Concessionaire List	None selected Date: (mm/dd/yyyy) Notes:
HHF Routing Number	None selected Date: (mm/dd/yyyy) Notes:

Business Contact Information

Main Company Email	
Main Phone *	Ext.
Main Fax	
Main Company Web Site	
Company Address *	
City *	
State/Province *	U.S. States/Provinces or Canadian Provinces
Zip Code/Postal Code *	U.S. Zip Code - or Canadian Postal Code
Country *	United States

Company Contact Person

Name * (first, last name)	
Title	
Email (Username)	(copy from above)
Phone Number	Ext. (copy from above)
Fax Number	(copy from above)
Time Zone *	US/Central

Commodity Codes

Commodity Codes	Add Commodity Codes No Codes Assigned

Review Cancel

4. Click **Review**.

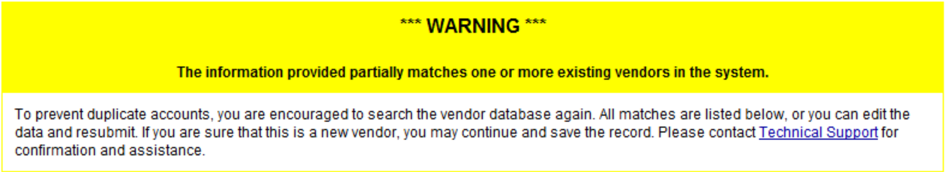
5. The system performs a search to determine whether the vendor is already in the system.

   No alert box Indicates the firm does not exist. You can create a new vendor account.

   Red alert box Indicates the system found an exact match. The vendor record cannot be saved.

   Yellow alert box Indicates one or more pieces of information matched a vendor already in the system. It may or may not be an exact match. The vendor record may be saved.

   For example, you may see the following yellow alert box.



To review data

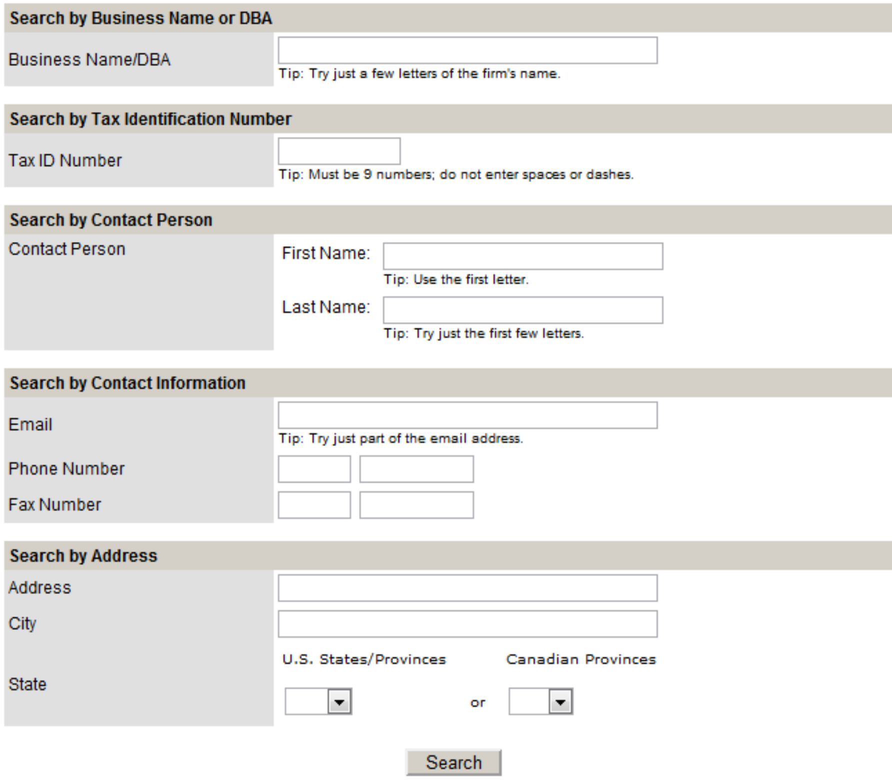
1. Verify the data is correct.
2. If necessary, edit data by clicking **Edit**.
3. When finished, click **Save**.

The vendor will be notified of the account creation.

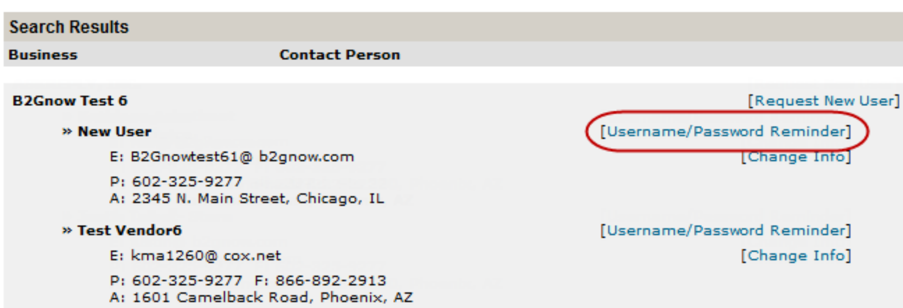
After adding the vendor, you can return to the Vendor Profile by clicking **View Vendor Account**.

To notify a vendor of their log in information

1. From the system login page, click **Account Lookup**.
2. In the **Search Parameters** area, enter search criteria, and then click **Search**.



3. In the **Search Results** area, identify the correct vendor and that the email address is correct.
4. Click **Username/Password Reminder**.



5. Click **OK** to verify you want to send the login information to the vendor.

If the vendor does not receive a user name/password notice, their current email may not match the email address listed in the system or their email system may be blocking the message. If the email address is incorrect, you can edit it. For more information, see Editing Users in this chapter.