

B2G**N**OW

Software for Government

Staff User Manual

Chapter 2 – Vendor Management



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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**.

Search: Vendors [Help & Tools](#)

[Users](#) [Vendors](#) [Contracts](#) [Concessions](#) [Outreach](#)

Listed below are all of the vendors that match your search criteria. Use the sort and filter functions of the table to reduce the size of the list. You can view more listings by using the navigation line at the bottom of the table.

To resort, click on column title.

<u>Business Name</u>	<u>Phone Number</u>	<u>Location</u>	<u>Actions</u>
All ▾			
B2Gnow Test Vendor, DBA Sprinkles Car Wash	602-325-9288	Pasadena, CA	20128754 Edit QuickView Contracts Concessions Certs
B2Gnow Test Vendor 10	602-325-9277	Phoenix, FL	20079187 Edit QuickView Contracts Concessions Certs
B2Gnow Test Vendor 11	602-325-9277	Phoenix, FL	20079197 Edit QuickView Contracts Concessions Certs

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.

Vendor Profile [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](#)

Business Name:	B2Gnow Test Vendor 4	General Information
		Profile
		Users
		Commodity Codes
		Contacts & Owners
		Certifications
		Contracts
		Concessions
		Comments
		Reviews
		Site Visits
		HHF Applications

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

[Save Changes](#)[Return](#)

Additional Information

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

[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.

* required entry

Address ?	
Address Name	<input type="text"/>
Address 1 *	<input type="text"/>
Address 2	<input type="text"/>
Address 3	<input type="text"/>
City *	<input type="text"/>
State/Province *	U.S. States/Provinces <input type="text"/> or Canadian Provinces <input type="text"/>
Zip Code/Postal Code *	U.S. Zip Code <input type="text"/> - <input type="text"/> or Canadian Postal Code <input type="text"/>
Country *	United States <input type="text"/>

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.

Vendor Profile: Public Profile Setup

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

As a vendor you can maintain a profile page that other users can view when evaluating your business. Enter the information below exactly as you would like another user to see it. To check the appearance of your profile page, click the **View** button. Changes are NOT saved until you click the **Save** button.

Spell Check View Save Cancel

* required entry

Business Information

Business Name	B2Gnow Test Vendor 4
Address	5025 N Central Ave., #494 Phoenix, AZ 85012

Order Information

Enter your order contact information and availability. If you are closed on the weekend, select the **Closed** checkbox.

Phone *	602 325-9277 Ext.
Fax	602 325-9277
Email	b2gnowtest4@b2gnow.com
Hours *	<p>Monday - Friday</p> <p>Open: 1 00 am Eastern Timezone</p> <p>Close: 1 00 am</p> <p>Saturday</p> <p><input type="checkbox"/> Closed</p> <p>Open: 1 00 am Eastern Timezone</p> <p>Close: 1 00 am</p> <p>Sunday</p> <p><input type="checkbox"/> Closed</p> <p>Open: 1 00 am Eastern Timezone</p> <p>Close: 1 00 am</p>
Additional Information	

- **Order Information.**
Displays information about the vendor, such as the vendor's general business hours.

Customer Service Information

Enter your customer service contact information and availability. If you are closed on the weekend, select the **Closed** checkbox.

<input type="checkbox"/> Same as Order Information	
Phone	602 325-9277 Ext.
Fax	602 325-9277
Email	b2gnowtest4@b2gnow.com
Hours	<p>Monday - Friday</p> <p>Open: 1 00 am Eastern Timezone</p> <p>Close: 1 00 am</p> <p>Saturday</p> <p><input type="checkbox"/> Closed</p> <p>Open: 1 00 am Eastern Timezone</p> <p>Close: 1 00 am</p> <p>Sunday</p> <p><input type="checkbox"/> Closed</p> <p>Open: 1 00 am Eastern Timezone</p> <p>Close: 1 00 am</p>
Additional Information	

- **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	<input type="text"/>
Business Description	<p>You can include a couple of paragraphs (up to 1000 characters) on your business, history, clients, etc.</p> <div style="border: 1px solid #ccc; height: 100px;"></div>
Number of Employees	<input type="text" value="0"/>
Annual Revenues	<input type="text" value="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?	<input checked="" type="radio"/> Yes <input type="radio"/> No										
If yes, enter your license number(s)	<table border="1"> <thead> <tr> <th>Industry Name</th> <th>License Number</th> </tr> </thead> <tbody> <tr><td><input type="text"/></td><td><input type="text"/></td></tr> <tr><td><input type="text"/></td><td><input type="text"/></td></tr> <tr><td><input type="text"/></td><td><input type="text"/></td></tr> <tr><td><input type="text"/></td><td><input type="text"/></td></tr> </tbody> </table>	Industry Name	License Number	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Industry Name	License Number										
<input type="text"/>	<input type="text"/>										
<input type="text"/>	<input type="text"/>										
<input type="text"/>	<input type="text"/>										
<input type="text"/>	<input type="text"/>										
DUNS Number	<input type="text"/>										
Certifications	<div style="border: 1px solid #ccc; height: 50px;"></div>										
Organization Memberships	<div style="border: 1px solid #ccc; height: 50px;"></div>										

- 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 ?

Select the services that you provide.

Payment Methods	<input type="checkbox"/> American Express <input type="checkbox"/> Diners Club <input type="checkbox"/> Discover <input type="checkbox"/> Master Card <input type="checkbox"/> Visa <input type="checkbox"/> Carte Blanche <input type="checkbox"/> CyberCash	<input type="checkbox"/> First Virtual <input type="checkbox"/> JCB <input type="checkbox"/> Check <input type="checkbox"/> Money Order/Cashier's Check <input type="checkbox"/> COD <input type="checkbox"/> Purchase Orders <input type="checkbox"/> Other
Additional Information <input type="text"/>		
Delivery Methods	<input type="checkbox"/> Immediate (Software Download) <input type="checkbox"/> Priority Next Day Air <input type="checkbox"/> Standard Next Day Air <input type="checkbox"/> First Class Air (2-3 days) <input type="checkbox"/> Standard Ground <input type="checkbox"/> International Express Air <input type="checkbox"/> International Regular Air <input type="checkbox"/> APO's/FPO's	
Additional Information <input type="text"/>		
Return Policies	<input type="checkbox"/> Restock Fee - <input type="text"/> % <input type="checkbox"/> Merchant Pays Return Shipping <input type="checkbox"/> 100% Satisfaction Guarantee <input type="checkbox"/> RMA Required	
Description <input type="text"/>		
Special Features	<input type="checkbox"/> Secure Ordering/Payment System <input type="checkbox"/> On-line Ordering Shopping Cart System <input type="checkbox"/> On-line Order Tracking System <input type="checkbox"/> Product Search Engine <input type="checkbox"/> Live Customer Representative <input type="checkbox"/> Customer Representative available 24 hrs a day <input type="checkbox"/> International Shipping Available <input type="checkbox"/> Gift Wrapping Available <input type="checkbox"/> Multi-lingual WWW site	
Other <input type="text"/>		

- **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**.

Vendor Profile: Users 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](#)

Listed are all of the users accounts for this business. To view a user's information, click the user number or name.

[Add User](#)

User Number	Name	Title	Contact Role(s)	Actions
20018259-003	Anderson, Dawn		Prevailing Wage, Sales	Copy Deactivate
20018259-001	Talbot-Stern, Justin		Certifications, Contracts, General, Invoicing, Owner	Copy Deactivate
20018259-006	Van Cleve, Jerry			Copy Deactivate

3. Enter user information.

*** required entry**

Contact Information ?

Enter the user's contact information. The email address serves as the the username.

Name *	Salutation *	First Name *	Last Name *	Suffix
Email/Username *				
Title				
Phone Number *			Ext.	
Fax Number *				
Password requirements	* Password must be at least 6 characters long.			
Choose password *				
Retype password *				

Addresses ?

Select the addresses for this user. To edit or add addresses, click the **Contact Info** tab at the top of this page.

Physical *	Select a physical address
Mailing *	Select a mailing address
Billing *	Select a billing address
Shipping *	Select a shipping address

Account Preferences ?

Select the timezone, language, and notification settings for this user.

Time Zone *	US/Central
Preferred Notification Method *	<input type="radio"/> Email AND Fax: Send me plain-text email <input type="radio"/> Email: Send me plain-text email <input type="radio"/> Fax <input type="radio"/> Don't send any notifications.
Notification Options	<input checked="" type="checkbox"/> Notify this user of new system features and services. Uncheck the box to not receive these notices. <input checked="" type="checkbox"/> Notify this user of outreach campaigns, such as seminar, training bulletins, and procurement opportunities. Uncheck the box to not receive these notices from City of Houston. This action has no impact on official government correspondence sent as part of any applicable agreement, contract, certification, or policy.

[Save](#) [User List](#)

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.

*** required entry**

Contact Information			
Enter the user's contact information. The email address serves as the the username.			
Name *	Salutation	First Name *	Last Name * Suffix
		Justin	Talbot-Stern
Email/Username *	b2gnowtest4@b2gnow.com		
Title			
Phone Number *	602	325-9277	Ext.
Fax Number *	602	325-9277	

Addresses	
Select the addresses for this user. To edit or add addresses, click the Contact Info tab at the top of this page.	
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, ...

Account Preferences	
Select the timezone, language, and notification settings for this user.	
Time Zone *	US/Arizona
Preferred Notification Method *	<input checked="" type="radio"/> Email AND Fax: Send me plain-text email <input type="radio"/> Email: Send me plain-text email <input type="radio"/> Fax <input type="radio"/> Don't send any notifications.
Notification Options	<input checked="" type="checkbox"/> Notify this user of new system features and services. Uncheck the box to not receive these notices. <input checked="" type="checkbox"/> Notify this user of outreach campaigns, such as seminar, training bulletins, and procurement opportunities. Uncheck the box to not receive these notices from City of Houston. This action has no impact on official government correspondence sent as part of any applicable agreement, contract, certification, or policy.

Save Changes User List

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.

Vendor Profile: Commodity Codes [Help & Tools](#)

Business Name: B2Gnow Test Vendor 4

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Listed are commodity codes assigned to this business. To add more commodity codes, enter codes in the second table and click **Add Code(s)**.

[Add Commodity Codes](#) | [Delete All Commodity Codes](#)

Assigned Commodity Codes			
Type	Code	Description	Action
NAICS	51121	Software Publishers	Delete
NAICS	511210	Applications software, computer, packaged	Delete

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.

Commodity Codes: Search [Help & Tools](#)

[Search](#)
[Browse Codes](#)
[Return](#)

NAICS: North American Industry Classification System

1 - 20 of 41 records displayed: [Previous Page](#) < Page 1 > [Next Page](#)

To sort, click on column title.

Code Type	Code	Code Description	Actions
NAICS	334611	CD-ROM, software, mass reproducing (More) [Size standard: 500 employees]	Add
NAICS	334611	Compact discs (i.e., CD-ROM), software, mass reproducing (More) [Size standard: 500 employees]	Add
NAICS	334611	Game cartridge software, mass reproducing (More) [Size standard: 500 employees]	Add
NAICS	334611	Games, computer software, mass reproducing (More) [Size standard: 500 employees]	Add
NAICS	334611	Prepackaged software, mass reproducing (More) [Size standard: 500 employees]	Add
NAICS	334611	Software, packaged, mass reproducing (More) [Size standard: 500 employees]	Add
NAICS	334612	Prerecorded Compact Disc (except Software), Tape, and Record Reproducing (More) [Size standard: 750 employees]	Add
NAICS	334613	Computer software tapes and disks, blank, rigid and floppy, manufacturing (More) [Size standard: 1000 employees]	Add
NAICS	42343	Computer and Computer Peripheral Equipment and Software Merchant Wholesalers (More)	Add
NAICS	423430	Computer software, packaged, merchant wholesalers (More) [Size standard: 100 employees]	Add
NAICS	423430	Game software merchant wholesalers (More) [Size standard: 100 employees]	Add
NAICS	423430	Software, computer, packaged, merchant wholesalers (More) [Size standard: 100 employees]	Add
NAICS	44312	Computer and Software Stores (More)	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.

Vendor Profile: Contacts & Owners [Help & Tools](#)

Business Name: B2Gnow Test Vendor 4

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This page details the account preferences for this business.

*** required entry**

Business Contacts	
Select a user for each type of contact.	
Main Contact *	Talbot-Stern, Justin
Primary Owner *	Talbot-Stern, Justin
Sales Contact *	Anderson, Dawn
Contracts Contact *	Talbot-Stern, Justin
Certifications Contact *	Talbot-Stern, Justin
Invoicing Contact *	Talbot-Stern, Justin
Prevailing Wage/Certified Payroll Contact *	Anderson, Dawn
Insurance/Risk Management Contact *	Talbot-Stern, Justin

[Save Changes](#) [Add User](#)

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%	

Add Owner

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.

Vendor Profile: Certifications

Help & Tools

Business Name: B2Gnow Test Vendor 4

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New Record

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

Change Request List

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.

Vendor Profile: Contracts Help & Tools

Business Name: **Sub Flooring, LLC**

[Main](#) | [General Info](#) | [Public Profile](#) | [Users](#) | [Commodity Codes](#) | [Contacts & Owners](#) | [Comments](#) | [Reviews](#) | [Certifications](#) | [Contracts](#) | [Concessions](#) | [Site Visits](#) | [Applications](#)

Listed below are the contracts to which this vendor is assigned.

Contracts as Prime Contractor						
No contracts assigned as a prime contractor.						

Contracts as Subcontractor						
Actions	Contract Number & Title	Sub Contact	Status	Prime	Current Subcontract	Paid Amount
View	4699999999: Pay or Play Contract	Veronica Lopez (change)		Prime Contracting, Inc.	\$1,150,000 115.00%	\$0
View	Pay Or Play Test Contract	Veronica Lopez (change)		Prime Contracting, Inc.	\$0 10.00%	\$0
Number of contracts as subcontractor: 2					\$1,150,000	\$0

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.

Vendor Profile: Concessions Help & Tools

Business Name: **B2Gnow Test Vendor 4**

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Concessions as Concessionaire			
Actions	Concession Number	Concession Title	Dates
View		B2Gnow Vending	8/1/2006 to 8/1/2012
View		Sample Concession (3 incomplete concessionaire audits with 3 incomplete revenue line items)	8/1/2008 to 8/1/2012

Concessions as Joint Venture Partner/Owner			
Actions	Concession Number	Concession Title	Dates
No concessions assigned as a joint venture partner/owner.			

Concessions as Subtenant			
Actions	Concession Number	Concession Title	Concessionaire
View		Sample Concession (3 incomplete revenue line items)	B2Gnow Test Vendor 4

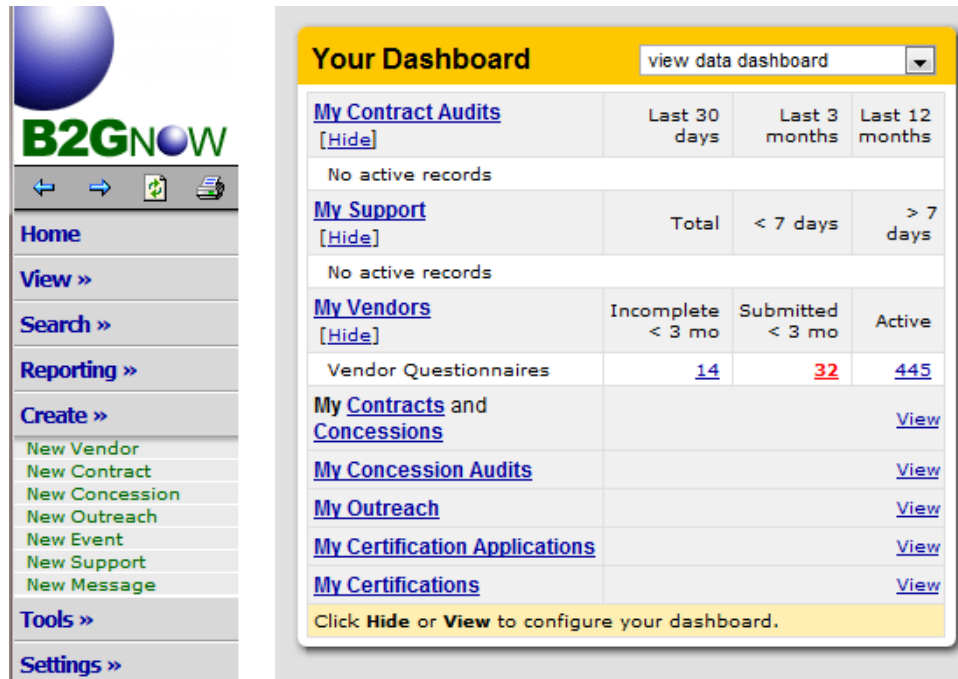
Concessions as Joint Venture Subtenant			
Actions	Concession Number	Concession Title	Concessionaire
No concessions assigned as a joint venture subtenant.			

Concessions as Supplier			
Actions	Concession Number	Concession Title	Concessionaire
No concessions assigned as a supplier.			

Adding vendors

To add a vendor

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



The screenshot shows the B2Gnow user interface. On the left is a vertical navigation menu with the B2Gnow logo at the top. The menu items are: Home, View », Search », Reporting », Create » (highlighted), New Vendor, New Contract, New Concession, New Outreach, New Event, New Support, New Message, Tools », and Settings ». The main content area is titled 'Your Dashboard' and includes a dropdown menu set to 'view data dashboard'. It contains several sections: 'My Contract Audits' (Last 30 days, Last 3 months, Last 12 months) with a 'No active records' message; 'My Support' (Total, < 7 days, > 7 days) with a 'No active records' message; 'My Vendors' (Incomplete < 3 mo, Submitted < 3 mo, Active) showing 14 incomplete, 32 submitted, and 445 active vendor questionnaires; and links to 'My Contracts and Concessions', 'My Concession Audits', 'My Outreach', 'My Certification Applications', and 'My Certifications', each with a 'View' link. A footer note says 'Click Hide or View to configure your dashboard.'

3. Complete the Vendor Registration form.

Business Information	
Business Name *	<input type="text"/>
DBA Name	<input type="text"/>
Tax ID Number	<input type="text"/> (Federal Tax ID or Social Security Number)
DUNS Number	<input type="text"/> (Look up a Dun & Bradstreet number)
Company Type	None selected
Company Ownership Ethnicity	None selected
Company Ownership Gender	None selected

Additional Information	
Reference 1	This field is for external system reference numbers.
Name: <input type="text"/>	<input type="text"/>
Reference 2	This field is for external system reference numbers.
Name: <input type="text"/>	<input type="text"/>
Reference 3	This field is for external system reference numbers.
Name: <input type="text"/>	<input type="text"/>
Site Visit	None selected Date: <input type="text"/> (mm/dd/yyyy) Notes: <input type="text"/>
Concessionaire List	None selected Date: <input type="text"/> (mm/dd/yyyy) Notes: <input type="text"/>
HHF Routing Number	None selected Date: <input type="text"/> (mm/dd/yyyy) Notes: <input type="text"/>

Business Contact Information	
Main Company Email	<input type="text"/>
Main Phone *	<input type="text"/> <input type="text"/> Ext. <input type="text"/>
Main Fax	<input type="text"/> <input type="text"/>
Main Company Web Site	<input type="text"/>
Company Address *	<input type="text"/> <input type="text"/> <input type="text"/>
City *	<input type="text"/>
State/Province *	U.S. States/Provinces <input type="text"/> or Canadian Provinces <input type="text"/>
Zip Code/Postal Code *	U.S. Zip Code <input type="text"/> - <input type="text"/> or Canadian Postal Code <input type="text"/>
Country *	United States

Company Contact Person	
Name *	<input type="text"/> <input type="text"/>
(first, last name)	
Title	<input type="text"/>
Email (Username)	<input type="text"/> (copy from above)
Phone Number	<input type="text"/> <input type="text"/> Ext. <input type="text"/> (copy from above)
Fax Number	<input type="text"/> <input type="text"/> (copy from above)
Time Zone *	US/Central

Commodity Codes	
Commodity Codes	<input type="button" value="Add Commodity Codes"/>
No Codes Assigned	

4. Click **Review**.

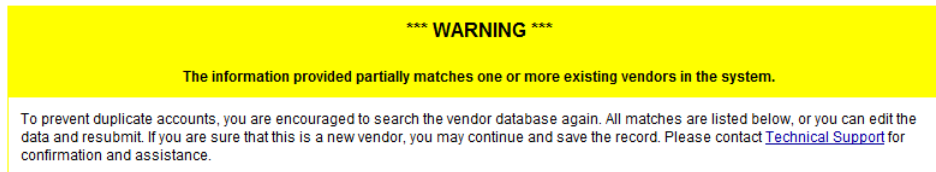
5. The system performs a search to determine whether the vendor is already in the system.

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**.

Search by Business Name or DBA

Business Name/DBA
Tip: Try just a few letters of the firm's name.

Search by Tax Identification Number

Tax ID Number
Tip: Must be 9 numbers; do not enter spaces or dashes.

Search by Contact Person

Contact Person

First Name:
Tip: Use the first letter.

Last Name:
Tip: Try just the first few letters.

Search by Contact Information

Email
Tip: Try just part of the email address.

Phone Number

Fax Number

Search by Address

Address

City

U.S. States/Provinces

Canadian Provinces

State
or

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

Search Results

Business	Contact Person
B2Gnow Test 6 <div> <div>» New User</div> <div> E: B2Gnowtest61@ b2gnow.com P: 602-325-9277 A: 2345 N. Main Street, Chicago, IL </div> </div> <div> <div>» Test Vendor6</div> <div> E: kma1260@ cox.net P: 602-325-9277 F: 866-892-2913 A: 1601 Camelback Road, Phoenix, AZ </div> </div>	<div> <div>[Request New User]</div> <div>[Username/Password Reminder]</div> <div>[Change Info]</div> </div> <div> <div>[Username/Password Reminder]</div> <div>[Change Info]</div> </div>

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.