



OPERATIONAL SERVICES DIVISION

Update Business Contact Information in the VRM Portal

Guidance for Statewide Contract Vendors

Serving Public Buyers and Vendors of the Commonwealth of Massachusetts



Overview

The Vendor Report Management (VRM) portal is used by Statewide Contract Vendors to submit their quarterly sales reports, as required.

The portal is designed to send sales report updates to Statewide Contract Vendors at key points during each reporting cycle. The portal may accommodate up to **two** Business Contacts to receive these important messages. These Business Contacts may be any staff member who is set up as a User in the VRM portal.

Use this guide to:

- Set Up a New User (p. 4);
- Designate a User as a Business Contact (p. 7).

Access the VRM Portal



The screenshot shows the VRM portal homepage. At the top left is the OSD logo with the text 'OPERATIONAL SERVICES DIVISION'. To the right are links for 'OUR MAIN SITE' and 'CONTACT SUPPORT'. The main banner features a collage of images (a person working, a bridge, a boat, and a vineyard) with the title 'Vendor Report Management System' and a 'Log In' button. Below the banner are three sections: 'System Training' with a 'TRAINING' button, 'Account Access' with 'ACCOUNT LOOKUP' and 'FORGOT PASSWORD' buttons, and 'About the System' with an 'INFORMATION FOR VENDORS' button. A footer note states: 'The Vendor Report Management System is powered by B2Gnow Software © Copyright 2019.'

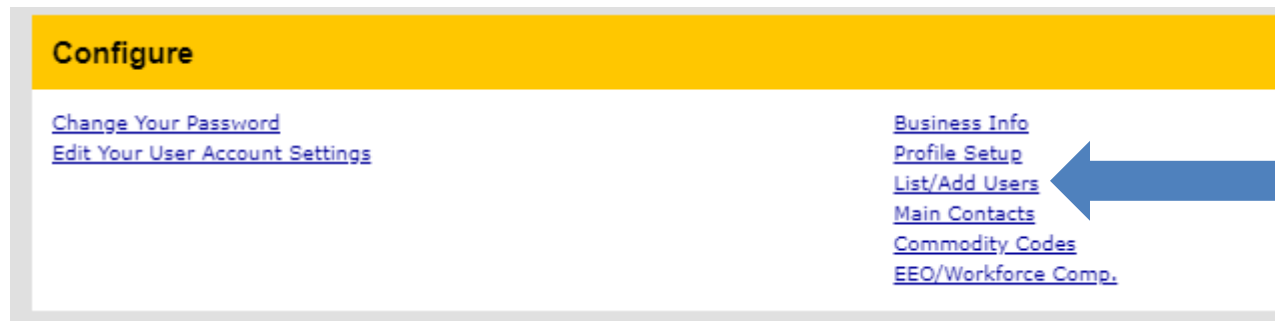
Go to massosd.gob2g.com to log in.

Set Up a New User

Before you may designate a staff member as a Business Contact, the individual must be set up as a User in the VRM portal.

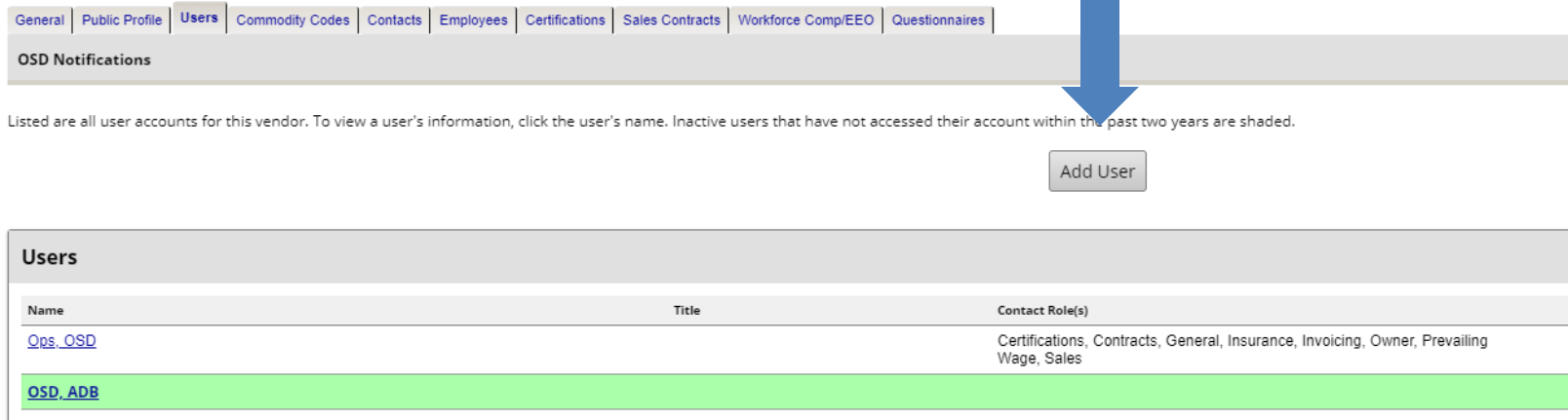
Note: If your Business Contact designees already are set up as Users, skip to p. 7.

From the portal dashboard, select List/Add Users from the Configure box on the bottom right of the screen.



Set Up a New User

Click Add User.



General | Public Profile | **Users** | Commodity Codes | Contacts | Employees | Certifications | Sales Contracts | Workforce Comp/EEO | Questionnaires

OSD Notifications

Listed are all user accounts for this vendor. To view a user's information, click the user's name. Inactive users that have not accessed their account within the past two years are shaded.

[Add User](#)

Users		
Name	Title	Contact Role(s)
Ops_OSD		Certifications, Contracts, General, Insurance, Invoicing, Owner, Prevailing Wage, Sales
OSD_ADB		

Set Up a New User

Complete the requested information and click Save.

General | Public Profile | **Users** | Commodity Codes | Contacts | Employees | Certifications | Sales Contracts | Workforce Comp/EEO | Questionnaires

OSD Notifications

These are the settings for the displayed user. When finished, click the **Save Changes** button.

*** 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
Username/Email *	ADB@OSD.test			
Title				
Phone Number *			Ext.	
Fax Number				
Choose password *	Password Strength Sufficient			
	Password requirements: Must be at least 6 characters long			
Retype password *				

Addresses


Select the addresses for this user. To edit or add addresses, click the General 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
Notification Options	<input checked="" type="checkbox"/> Notify this user of new system features and services. Uncheck the box to not receive these notices.

 Save User List

Designate a User as a Business Contact

From the portal dashboard, select your contract.

Dashboard		Displaying records assigned to your company ▼
Sales Contracts		
Total		1
Open		1
Sales Reports		
Total		6
All Pending		6
» Pending Submission		3
» Returned, Pending Resubmission		3
» Past Due		5

Designate a User as a Business Contact

Select the *change* hyperlink from the Sales Contracts box to update Business Contact information.

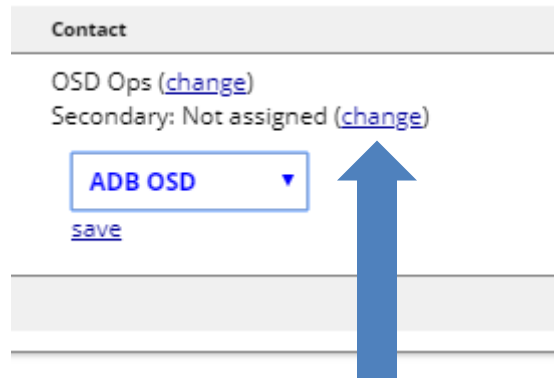
Sales Contracts				
Actions	Organization	Contract	Status	Contact
View	Commonwealth of Massachusetts Operational Services Division	X Contract: Notifications	Active 6 incomplete reports	OSD Ops (change) Secondary: Not assigned (change)



Designate a User as a Business Contact

The dropdown will display all current Users.

Select the User to be added as a Business Contact.



The screenshot shows a web form titled "Contact". It contains two lines of text: "OSD Ops ([change](#))" and "Secondary: Not assigned ([change](#))". Below these is a dropdown menu with "ADB OSD" selected and a downward arrow. A blue arrow points upwards from the bottom of the form towards the dropdown menu. Below the dropdown is a "save" link.

A green banner will confirm any Business Contact update, primary or secondary:

Assigned primary contact updated.

Questions

Need assistance?

Contact the OSD Help Desk:

COMMBUYS@mass.gov

888 MA-State (627-8283)