

Job Aid: <u>Vendor Report Management System</u> How to add an Invoicing Contact

This Job Aid shows how to add an Invoicing Contact in the Vendor Report Management System (VRM)

1. From your Vendor Report Management System home page, or, dashboard, click on the "My Sales Contracts" link in the navigation bar on the left side of the screen.

System	Dashboard	Displaying records assigned to your company 🗸	Key Actions		
B2GNOW	Sales Contracts	Total	Take a Training Class		
	Total	1	Watch a Training Video		
lome	Open	1	Activate Enhanced Account Security		
	Sales Reports	Total			
V Alerts	Total	11	Alerts		
y Certifications	All Pending	3	Alerts		
y Contracts ly Contract Audits	Pending Submission	3	No Activated Alerts. <u>View Pending Alerts</u> .		
y Workforce Audits	Past Due	3			
Ity Involces Ity Sales Contracts Ity Sales Reports		8	Configure		
ly Concessions ly Concession Audits ly Utilization Plans	c rtification Center	4	Change Your Password Activate Enhanced Account Security	Business Info Profile Setup List/Add Users	
fy Outreach fy Events fy Reviews fy Questionnaires	If your firm holds active certifications (SBE/MBE/WBE/ your account.	DBE/HUB/etc) from any organization. <u>submit a request</u> to add them to	View, Vote, & Post to the Wish List	Main Contacts Commodity Codes EEO/Workforce Comp.	
ty Bid Solicitations ty Prevailing Wage ty Favorite Vendors ty Messages			System News		
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ttings »			92 23	1	
alp & Support »			Enhanced Acco	bunt Security	
goff			L		
Show All Hide All			Special Features for Vendors		
			Do you have success story to share related to our program?	Share your testimonial so we can recognize your accomplishment!	
sound on as			Check out the outern With List to submit ideas for suctain as addii Administrative Fee Collections - V000.4 - Re	abancements, vote on others' suggestions, and join the discussion by cent tem.	
DB OSD			Payments Sheet - Qlik Sense - Google Chrome		

2. On the "Vendor Profile: Sales Contracts" page, select the Invoicing "Change" link to open a dropdown menu. Select the Invoicing Contact from that drop-down menu. This is the individual that will receive notifications from the VRM.

B2GNOW	General Public/Polite Users Commodity Codes Contacts Employees Certifications Sales Contracts Workforce Completion Questionneires								
	OSD Notifications S					System Vendor Number: 20780487			
Home View »	Sales Contracts							User Manual	
My Alerts	Actions	Organization	Contract	Status	Contact	Reporting Dates	Sales Reported	Diverse Expenditures	Participation
Hy Certifications Hy Contract Hy Contract Hy Contract Hy Contract Hy Workfore Additional Hy Worke Hy Sales Contracts Hy Sales Contracts Hy Concession Audite Hy Concession Hy Concession Hy Concession Hy Contract Hy Utilization Hy Contract Hy Contr	View	Commonwealth of Massachusetts Operational Services Division	X Contract: Notifications	Active	OSD Ops (<u>change</u>) Secondary: ADB OSD (<u>change</u>) Involcing: Jon Boy (<u>change</u>) Jon Boy OSD Ops	7/1/2018 to 12/31/2022	\$929.000	\$0	0.00%
					Jimmy Theone	Number of contracts: 1	\$929,000	\$0	0.00%
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Search »									
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3. If the individual you want to designate as the Invoicing Contract is not included in the dropdown menu, click on the "Users" tab at the top of the screen. Then, click the "Add User" button.

Test System B2GNOW · · · · · · · · · · · · · · · · · · ·	Vendor Profile: Users Central Rule College Central Rule College Central Rule College Central Rule Rule Rule Rule Rule Rule Rule Rul						
My Contracts My Contract Audits	Users						
My Invoices	Name	Title	Contact Role(s)	Last Login	User Number	Actions	
My Sales Contracts My Sales Reports My Concessions	Boy, Jon (inactive user)				20780487-0004	Message Copy Deactivate	
My Concession Audits My Utilization Plans	Ops. OSD (inactive user)		Certifications, Contracts, General, Insurance, Invoicing, Owner, Prevailing Wage, Sales, Utilization Plans	7/23/2019	20780487-0001	Message Copy Deactivate	
My Outreach My Events My Reviews	OSD, ADB			9/8/2022	20780487-0002	Message Copy Deactivate	
My Questionnaires My Bid Solicitations	Theone. Jimmy (inactive user)				20780487-0003	Message Copy Deactivate	
My Favorite Vendors My Messages Search »							
Message » Settings »	Customer Support Copyright @ 2022 B2Gnow, All rights reserved.				Hame Print3	Inis Page Print To PDF Translate	
Help & Support » Logoff							

4. This will take you to the "Contact Information" page. Fill out the required fields (indicated with a red asterisk *) Be sure to click save when finished to add your new contact. After selecting save, be sure to go back and add that user as a contact, as detailed in step #2. You can have up to two (2) invoicing contacts.

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Search »	Env pre upris contactionnello. The environment								
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Help & Support »	USERNAME/EMAIL •								
Stor Al Hite Al	TITLE								
	PHONE NUMBER *		ter en						
	MOBILE NUMBER								
	FAX NUMBER								
	PASSWORD		Will be automatically generated						
	Addresses								
	Select the addresses for this user. To edit or add addresses, clic	k the General tab at the top of this page.							
	PHYSICAL .	Select a physical address	▼						
	MALINS .	Select a mailing address							
	BILUNG • Select a billing address		▼						
	SHIPPING -	Select a shipping address	v						
	Account Preferences								
	Select the timezone and notification settings for this user.								
	TIME ZONE •		UDECentral • •						
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