

Public Works Diversity Tracking & Management System (powered by B2GNow) Quick Reference Guide

Add Subcontractors to a contract

From the Left Hand Navigation Bar on the Home Screen,

1. Click **View**
2. Click **My Contracts**

In the Vendor Information Section

3. Click on **View** in the Actions column to open the contract
4. Click the **Subcontractors** tab
5. Click **Add First Tier Subcontractor**
6. Click **Get Vendor**
 - a. In the **Get Vendor** search screen,
 - b. Enter search data
 - c. Click **Search All Matches**
 - d. If subcontractor is found,
 - i. Click **Select Vendor**
 - e. If subcontractor is not found,
 - i. Click **Add New Vendor**
 - ii. Enter the following fields:

Business Information

- Business Name
- DBA, if applicable
- Tax ID Number
- All other fields are not required

Business Contact Information

- Main Company Email
- Main Phone
- Main Company Website, if available
- Company Address
- Company City
- Company State
- Company Zip code

Company Contact Person

- Name
- Title, if available
- Email (Username)
- Phone Number, if different from Main Phone
- Time Zone

7. Click **Review**

- a. When you click **Review**, the system checks the vendor database verify if an existing record is similar or exact match to the vendor information you entered.
 - i. A yellow alert means the system identified a “soft match,”
 1. If the “soft match” is not the subcontractor you are trying to add to the contract,
 - a. Click **Save the New Vendor Record**.
 2. If you think the “soft match” is the subcontractor you are trying to add to the contract,

- a. Click **View Vendor** to access the record to make any necessary updates to address, users, contact information, etc.
- ii. A red alert means the system identified a “hard match” based on tax id and/or UBI
 1. The system will not allow you to save the a duplicate vendor
 2. Click **View Vendor** to access the existing vendor record to make any necessary updates to address, users, contact information, etc.
8. If only one **Contact person for that subcontractor** exists, system will default to that contact person. If more than contact person for that subcontractor exists, choose the correct one from the dropdown list.
9. If only one **Address for that subcontractor** exists, system will default the address. If more than one exists, choose the correct one from the dropdown list.

In the Applicable Vendor Certification Section,

10. Click Assign Vendor

11. Click to refresh certification list to see current certification the for the subcontractor/supplier.



In the Subcontractor Information Section,

12. Enter information the following fields:

- a. Subcontract Percent/Amount
- b. Include in Compliance Audits?
 - i. If the subcontractor is active and receiving payments, choose Yes
 - ii. If they are not yet active, choose No.
- c. Count Towards Certified Goals?
 - i. If you were able to verify the subcontractor had one of the following Vendor Certification in the previous step, choose which certification type you would like the payments made to this subcontractor to count towards;
 1. MBE
 2. WBE
 3. MWBE
 4. VA
 5. SBE
 - ii. You can only choose one goal type for that sub/supplier for a contract.
- d. Type of Participation – choose the appropriate response
- e. Work Description
- f. Subcontract Award/Commit Date
- g. Estimated Work Start Date
- h. Estimated Work End Date
- i. Add vendor to existing audits for this contract – choose the appropriate response
- j. Comments



13. Click Review

14. Verify the information is correct

15. Click Edit if you need to make changes

16. Clcik Save if you are done.