**Contract Specialist Quick Reference: Add New Vendor**  **https://des.diversitycompliance.com/**

**Search For A Vendor – always perform this action BEFORE creating a new vendor**

**Navigation: Home Screen🡪Search🡪Vendors**

* Enter search parameters and click **Search All Matches**
* If vendor not found in the search results, click **Add New Vendor**

When searching for vendors, include the Business Name and also the TIN, if available. If you only have the name, then search using the main part of the name and remove things like “LLC”, “Inc”, “Co”, etc…

**Add New Vendor**

**Navigation: Home Screen🡪Search🡪Vendors🡪Search Results🡪Add New Vendor**

 **Business Information**

* Enter in the **Business Name**
* Enter in the **DBA,** if applicable
* Enter in the **Tax ID Number**
* Do not need to enter the **Company Type –** leave as **None Selected**
* Do not need to enter the **Company Ownership Ethnicity –** leave as **None Selected**
* Do not need to enter the **Company Ownership Gender –** leave as **None Selected**

**Reference Numbers**

* Enter in **UBI** in the **Name** field and the **UBI Number** in the **Number** field
	+ UBI Number must be entered as nine digits with no spaces or dashes (for example – 652325125)

**Business Contact Information**

* Enter in the **Main Company Email**
* Enter in the **Main Phone**
* Enter in the **Main Company Website**, if available
* Enter in the **Company Address**
* Enter in the **Company City**
* Enter in the **Company State**
* Enter in the **Company Zipcode**

**Company Contact Person**

* Enter in the **Name** (first, last name)
* Enter in the **Title**, if available
* Enter in the **Email (Username) –** click **copy from above**, if the information is the same
* Enter in the **Phone Number,** if different from Main Phone - click **copy from above**, if the information is the same
* Enter in the **Time Zone**

**Click on Review**

When you click **Review,** the system will check the vendor database to ensure that an existing record doesn’t already exist. You may be presented with a yellow alert which means the system identified a ‘soft match’ based on similar information. If the vendor account is actually different, then you can click **Save the New Vendor Record**. If you think the vendor is the same, click on View Vendor to access the existing vendor record to make any necessary updates to address, users, contact information, etc.

If you encounter a red alert, it means the system identified a ‘hard match’ typically based on tax id and/or vendor reference numbers (UBI). The system will not allow you to save the new vendor record. Click on **View Vendor** to access the existing vendor record to make any necessary updates to address, users, contact information, etc.

If you are not finished creating your vendor and you need to navigate to another part of the system, go to the **left hand navigation bar** and **right click** on the screen you want to navigate to. Then click on **Open in New Tab**. This will open a new screen and also leave your vendor screen open for you to finish completing. Your vendor information will not be saved until you enter the required fields and click on **Review** and then **Save**.