NC electronic Vendor Portal

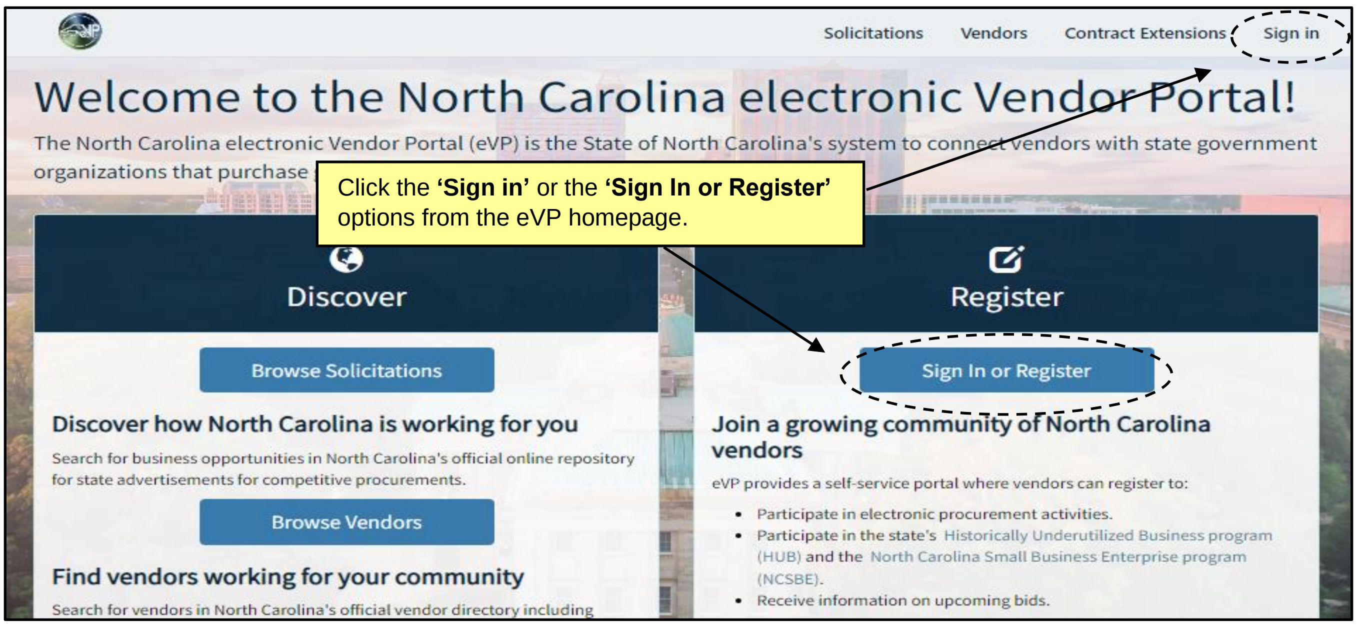
Managing eVP Account/Contacts

The North Carolina electronic Vendor Portal (eVP) is an internet application that allows companies and individuals to register to do business with the state of North Carolina. Vendors are required to manage their account and keep it up to date. Vendors can update their information by going to the eVP homepage. This guide provides detailed steps to update the contacts, addresses, and locations on an eVP account.

I. Accessing an Existing eVP Account

The eVP login page requires Multifactor Authentication (MFA) via email. MFA adds an additional layer of security with two-step verification to access your eVP account.

1. Navigate to the eVP homepage at https://evp.nc.gov and click the **'Sign In or Register'** button or the **'Sign in'** link in the top right of the screen.

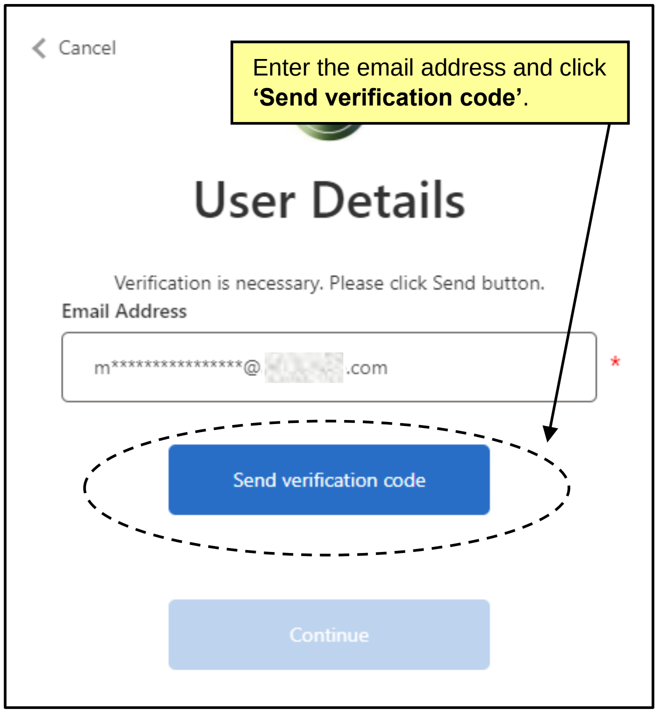


2. Click the **'Login'** button on the next page.

   a) **Credentials (Email Address and Password) are known**:

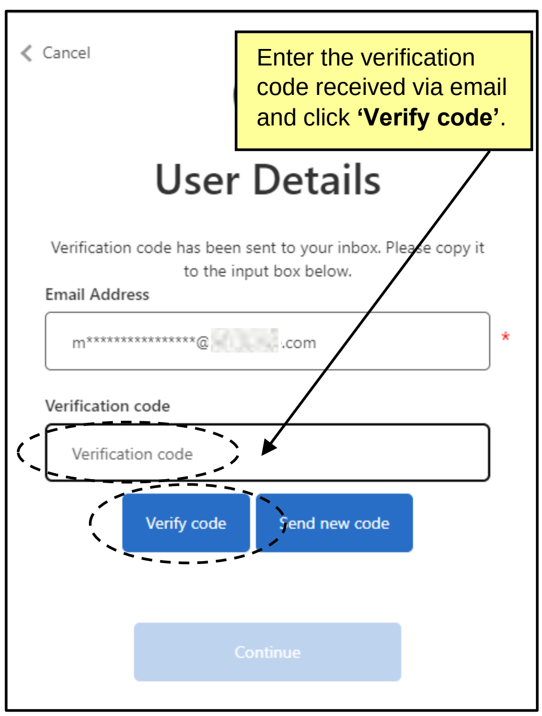
      i. Enter established credentials into the **'Email Address'** and **'Password'** fields. Click the '**Sign in**' button.

      ii. After signing in, a Multifactor Authentication (MFA) verification code will be required. Enter the same email address into the **'Email Address'** field. Click the **'Send verification code'** button.



iii. Upon clicking **‘Send verification code’**, a verification email will be sent to the email address provided, and a **Verification Code’** field will appear on the **‘User Details’** page. In the verification email, there will be a verification code.

iv. Type the verification code received in the email into the **‘Verification Code’** field and select **‘Verify Code’** to enable MFA for the eVP account.



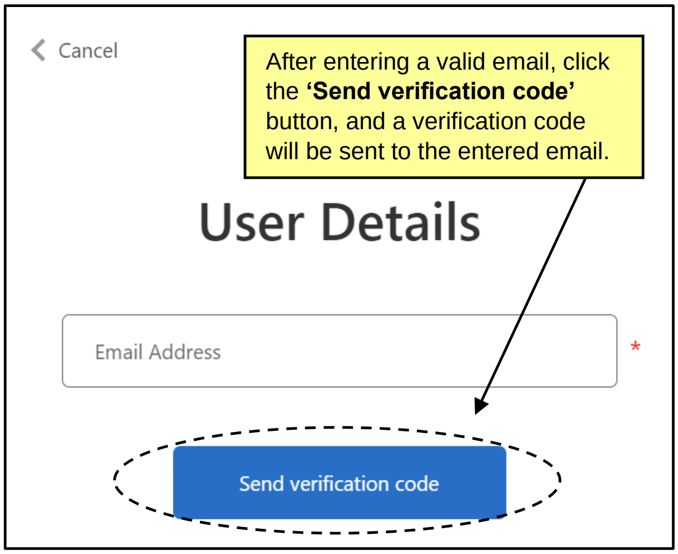
v. Once verification is complete, users can click ‘**Continue**’ to proceed to use eVP.

b) **Credentials (Email Address and Password) Have NOT been established**:

Note: These instructions are for vendors who have an eVP account but have not accessed it since July 2023.

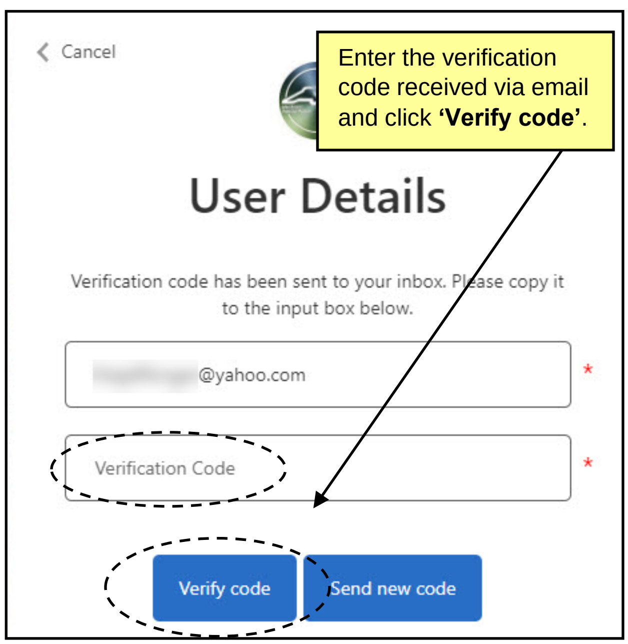
i. Click the **‘Sign up now’** link on the subsequent **‘Sign in’** page.

ii. Type the email address to be associated with the eVP contact into the **‘Email Address’** field on the subsequent **‘User Details’** page and click the **‘Send verification code’** button. The verification code will be sent to the email address provided.



iii. A **‘Verification Code’** field will display. Type the verification code sent via email into the **‘Verification code’** field and click the **‘Verify Code’** button, then click the **‘Continue’** button.

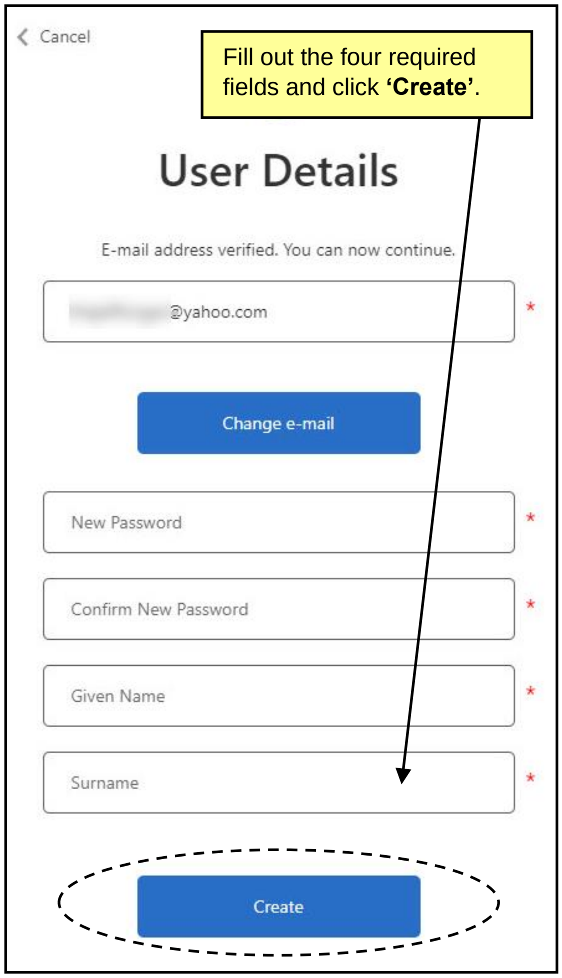
Note: If an incorrect verification code is used, an error saying “The verification has failed, please try again” will appear.



iv. The **‘User Details’** page will display and contains several required fields requesting more information about the person registering the company. Complete the ‘**New Password’**, **‘Confirm New Password’**, **‘Given Name’**, and **‘Surname’** fields and select the **‘Create’** button to establish credentials.

Notes:

- The **‘Given Name’** field should be the user’s first name, and the **‘Surname’** field should be the user’s last name.
- Ignore the **‘Change e-mail’** button.



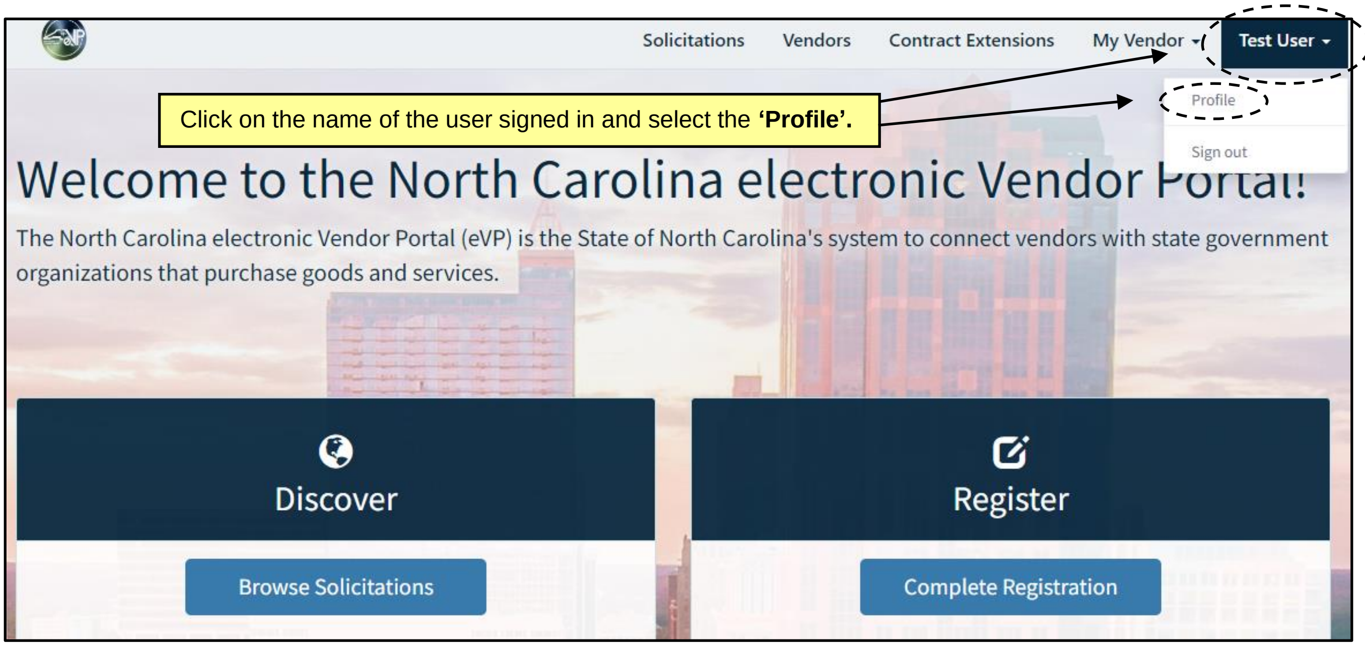
v. After establishing credentials in eVP, users will have to enable Multifactor Authentication (MFA). Please refer to the steps above beginning with **2 a)** for enabling MFA.

Notes:

- The MFA code will be different from the verification code used to authenticate the email address when establishing credentials.
- Have credentials but forgot password? Select ‘**Forgot your password’** on the ‘**Sign In**’ page. Establish a new password, then follow the steps beginning with **2 a)** for enabling MFA

II. Updating Profile Information

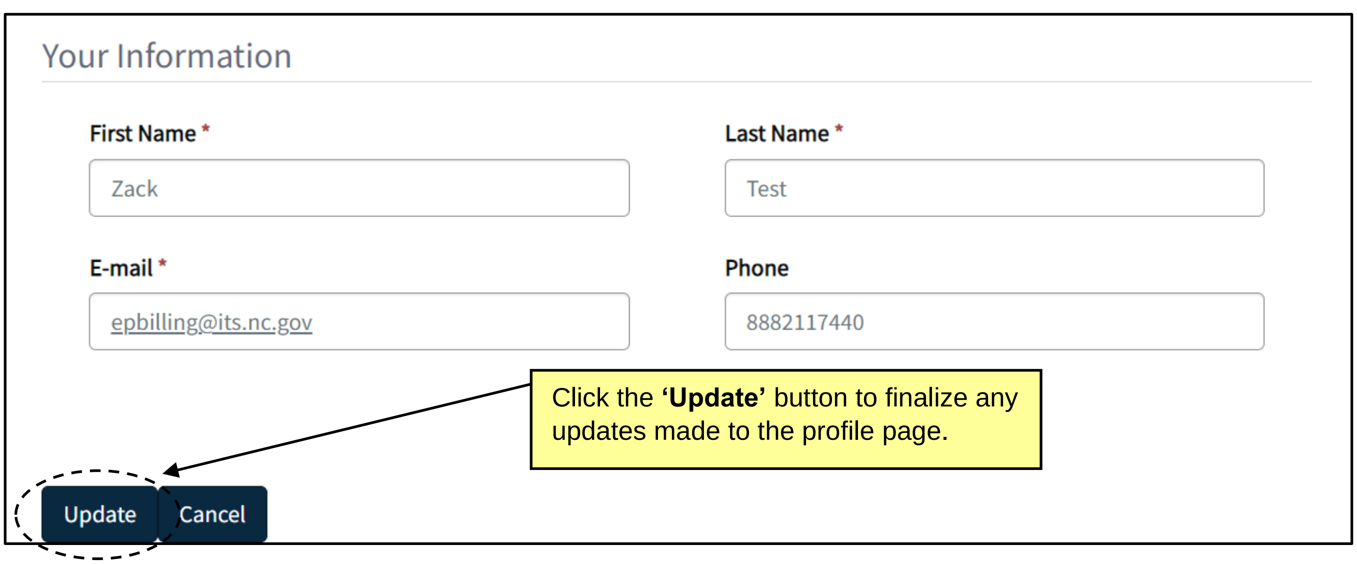
1. From the Home page, click on the Name of the User in the upper right-hand corner of the screen and select the **‘Profile’** option.



2. Users can update any of the following fields from the **‘Profile’** page.

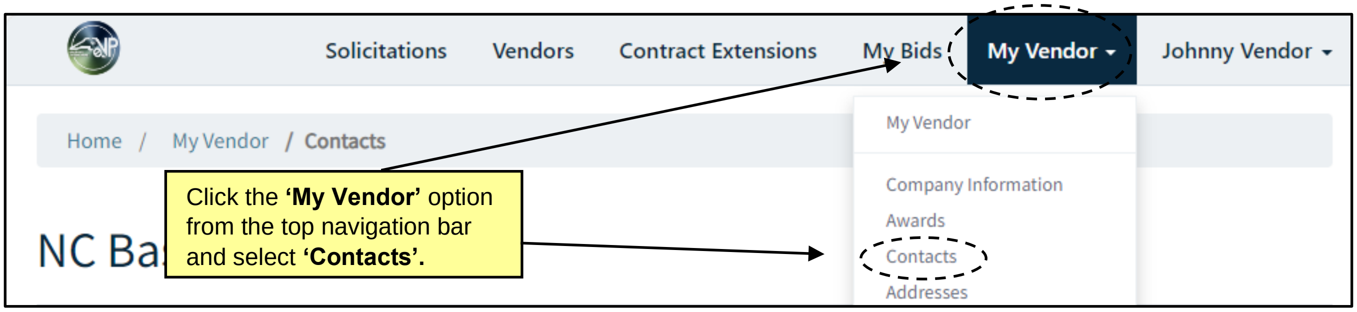
    a. **‘First Name’** – The first name associated with the user.
    b. **‘Last Name’** – The last name associated with the user.
    c. **‘Email’** – The email address associated with the user.
    d. **‘Phone’** – The business phone number that is associated with the user.

3. Update any field(s) that needs to be updated and click the **‘Update’** button. The user’s profile will be updated.

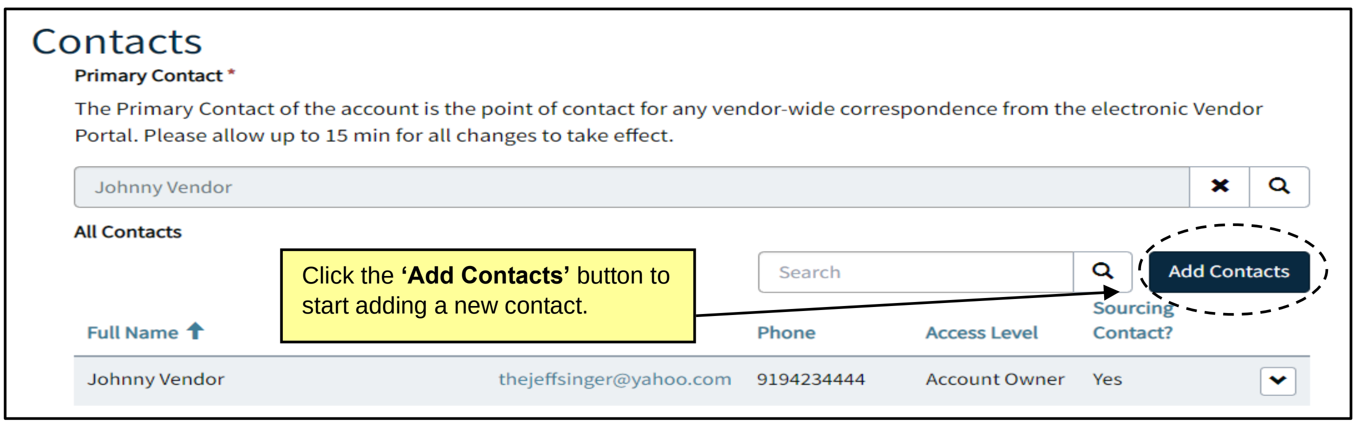


III. Adding a Contact

1. After selecting the **'My Vendor'** option from the navigation bar on the top of the page, click the **'Contacts'** option from the drop-down menu.



2. Click the **'Add Contacts'** button and populate the **'First Name'**, **'Last Name'**, **'Email'**, and **'Phone Number'** fields with the new contact's information.



3. Select the appropriate **'eVP Access Level'** by clicking the radio button next to it.

    a. **Account Owner** – This access level allows the contact to edit all editable account information and to submit electronic bid responses. Only users with the Account Owner access level can edit or complete HUB and NCSBE certifications.
    b. **Account Maintenance** – This access level allows users to submit electronic bid responses and modify all account information except for the Registration Type and Company Information Page. This access level allows users to submit electronic bid responses.
    c. **Read Only** – This access level allows users to submit electronic bid responses, but the contact will not be able to edit the account.

4. If necessary, click the check box next to **'This contact is a sourcing contact'**. This will enable the contact to have additional NC eProcurement Sourcing permissions.

5. Click the **'Submit'** button. The new contact should be visible in the **'All Contacts'** table. The newly added contact will get an email invitation to create their profile.

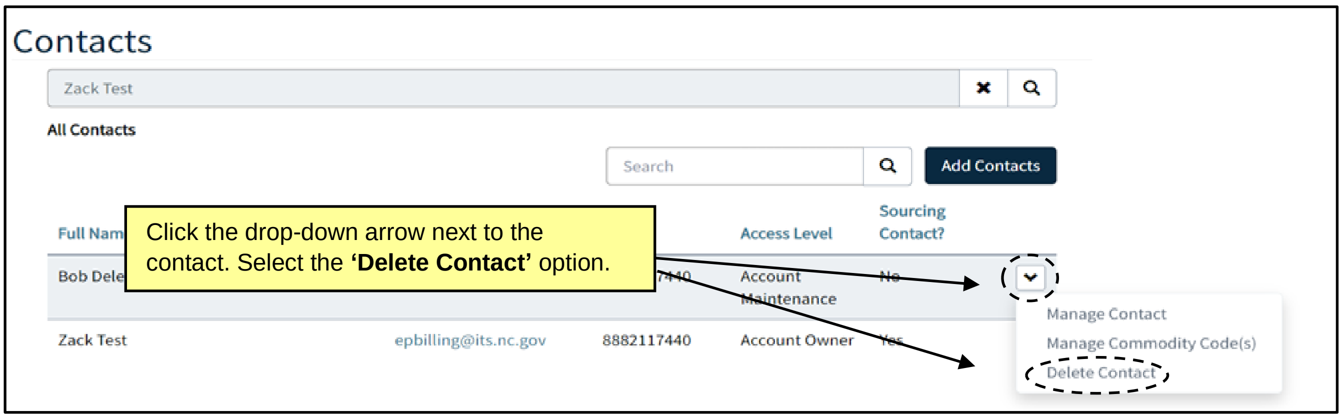
IV. Deleting a Contact

1. On the **'Contacts'** page click the drop-down arrow next to the contact that needs to be deleted.

2. Select the **'Delete Contact'** option. The contact will no longer show up in the **'All Contacts'** table.

Notes:

- If a user is associated with the locations page, they should be replaced with a different user before deleting them.
- The account must always have at least one account owner.

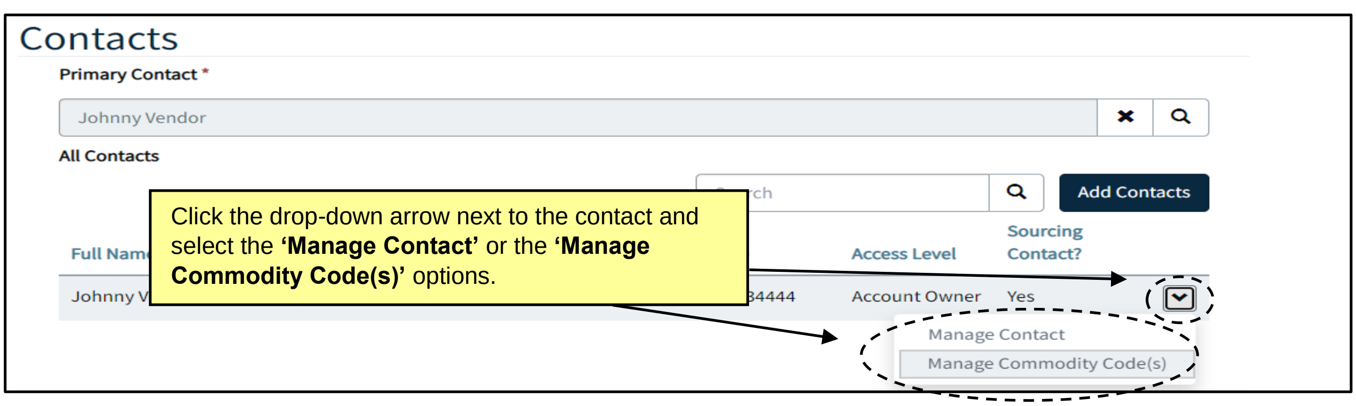


V. Editing an Existing Contact

1. To edit a contact, click the drop-down arrow next to the contact in questions. Click either the **'Manage Contact'** or the **'Manage Commodity Codes'** option depending on what needs to be edited.

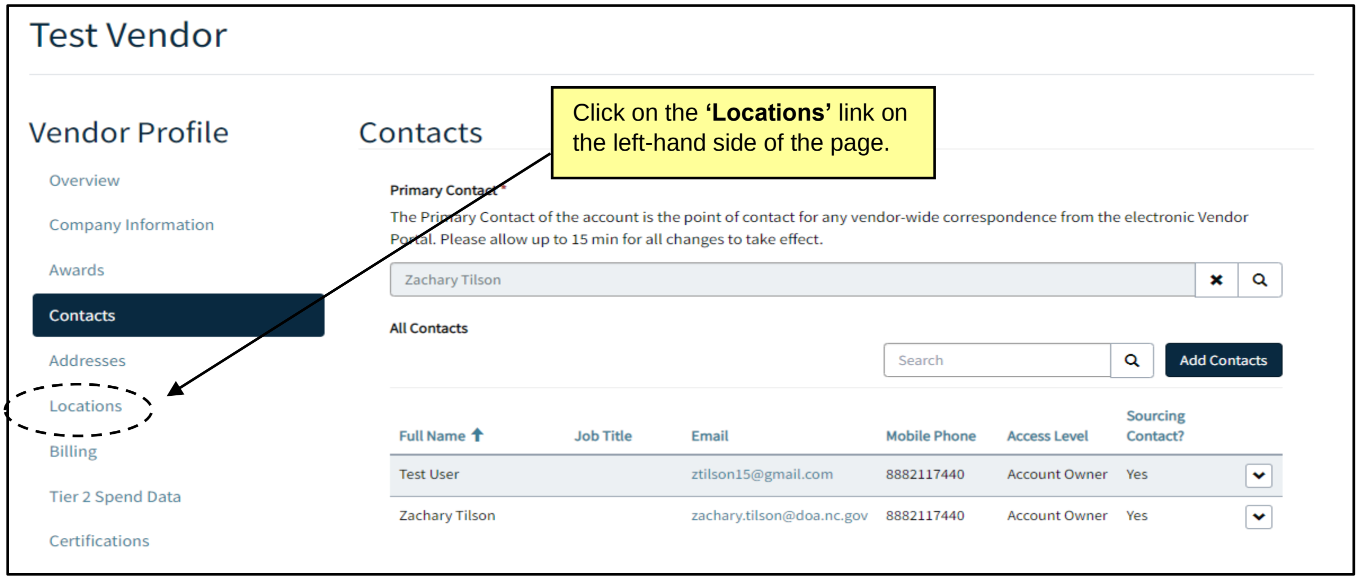
   a. The **'Manage Contact'** option will allow the user to edit the contact's basic information. After making any necessary updates click the **'Submit'** button. This will update the user.

   b. The **'Manage Commodity Codes'** option will allow the user to add and remove commodity codes associated with the contact. To remove commodity codes, select the drop-down arrow next to the code and select the **'Remove Commodity Code'** option. To add commodity codes, click the **'Add Commodity Code(s)'** button to add commodity codes. Bid notifications are sent to contacts based on the commodity codes associated with their contact record.



VI. Adding a Location

1. Click on the **'Locations'** link on the left-hand side of the page.



2. Select the **'Add Location'** button. Complete the following fields to create the Location:

3. **'Location Name'** – Enter the Location Name to uniquely identify the company location. The Location Name should include any information needed to uniquely identify the location: division name, subsidiary business name, geographic location, product division, etc. This field will be seen in the buyer system and will be used by buyers to select the correct location to which to send their purchase order.

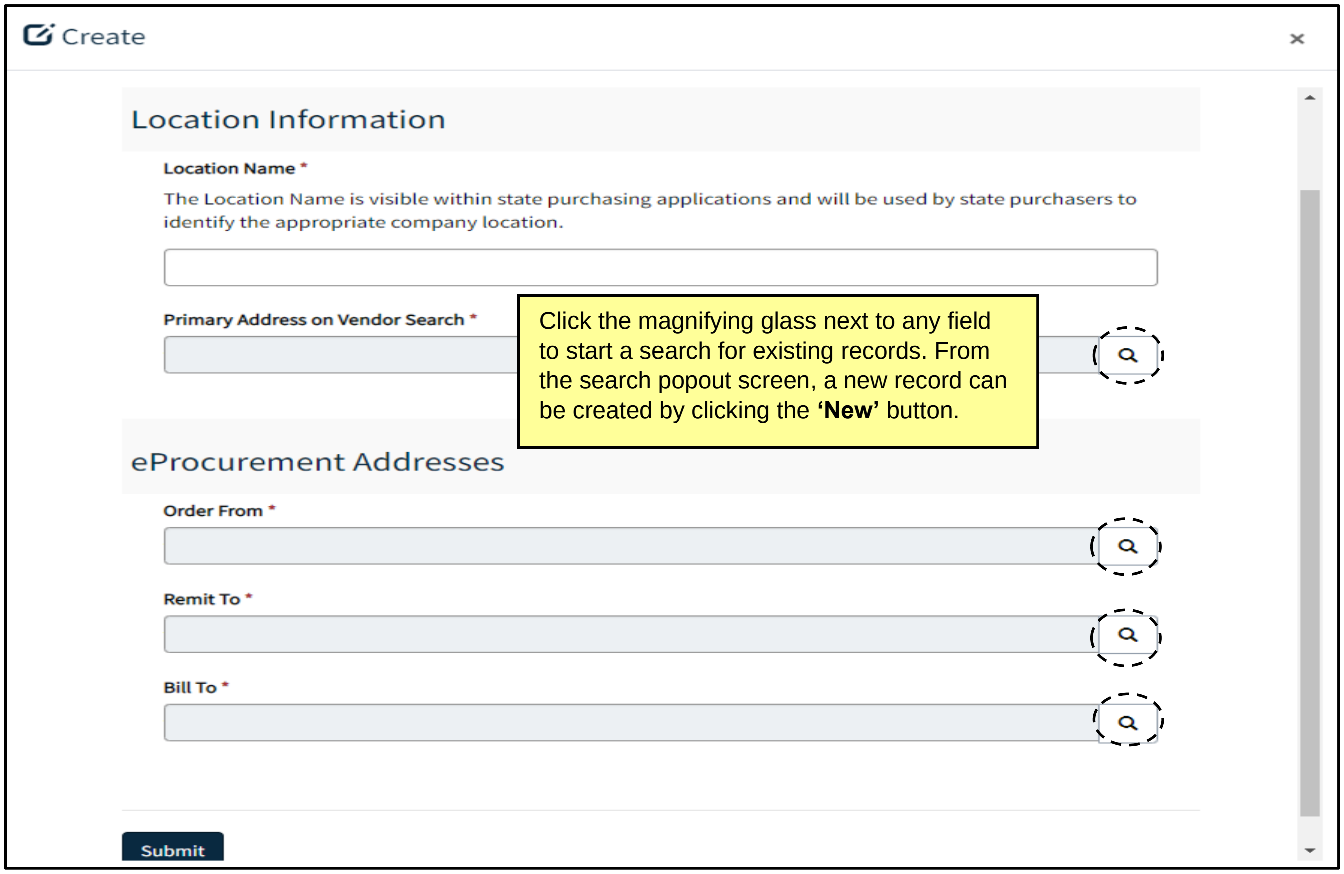
4. **'Primary Address on Vendor Search'** – Click the magnifying glass next to the **'Primary Address on Vendor Search'** field**.** On the popup window, select an existing record, or click the **'New'** button in the lower left-hand corner. If the **'New'** button is selected, fill out all the required fields and select the **'Submit'** button.

5. **'Order From'** – The Order From section determines where purchase orders are sent. Click the magnifying glass next to the **'Order From'** field, select an existing Order From, or click the **'New'** button in the lower left-hand corner. If the **'New'** button is selected, fill out all the required fields and select the **'Submit'** button.

6. **'Remit To'** – The Remit To section determines where payment for goods and services is sent. Click the magnifying glass next to the **'Remit To'** field, select an existing Remit To, or click the **'New'** button in the lower left-hand corner. If the **'New'** button is selected, fill out all the required fields and select the **'Submit'** button.

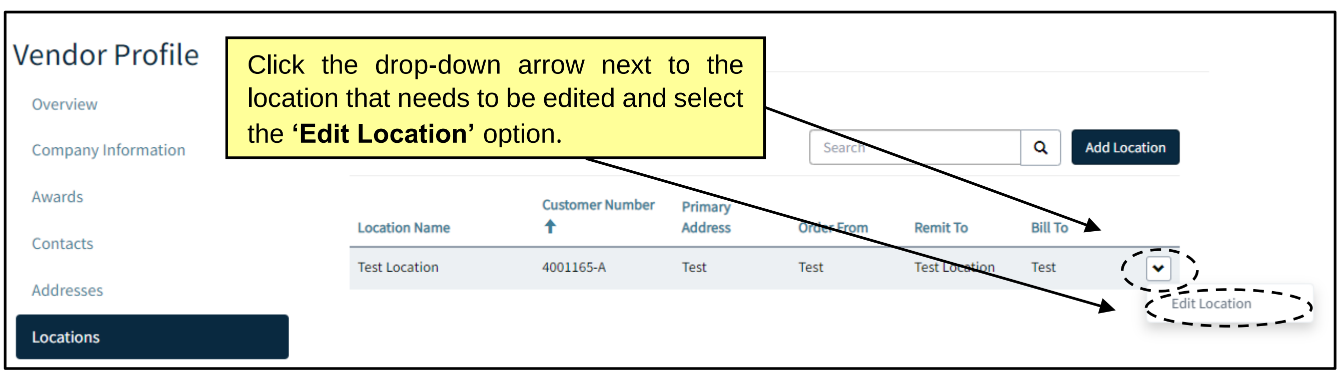
7. **'Bill To'** – The Bill To section determines where invoices for NC eProcurement transaction fee is sent. Click the magnifying glass next to the **'Bill To'** field, select an existing Remit To, or click the **'New'** button in the lower left-hand corner. If the **'New'** button is selected, fill out all the required fields and select the **'Submit'** button.

8. Click the **'Submit'** button. The location will be created and visible in the **'All Locations'** table.



VII. Editing a Location

1. On the **'Locations'** page, click the drop-down arrow next to the location that needs to be edited. Click the **'Edit Location'** option.

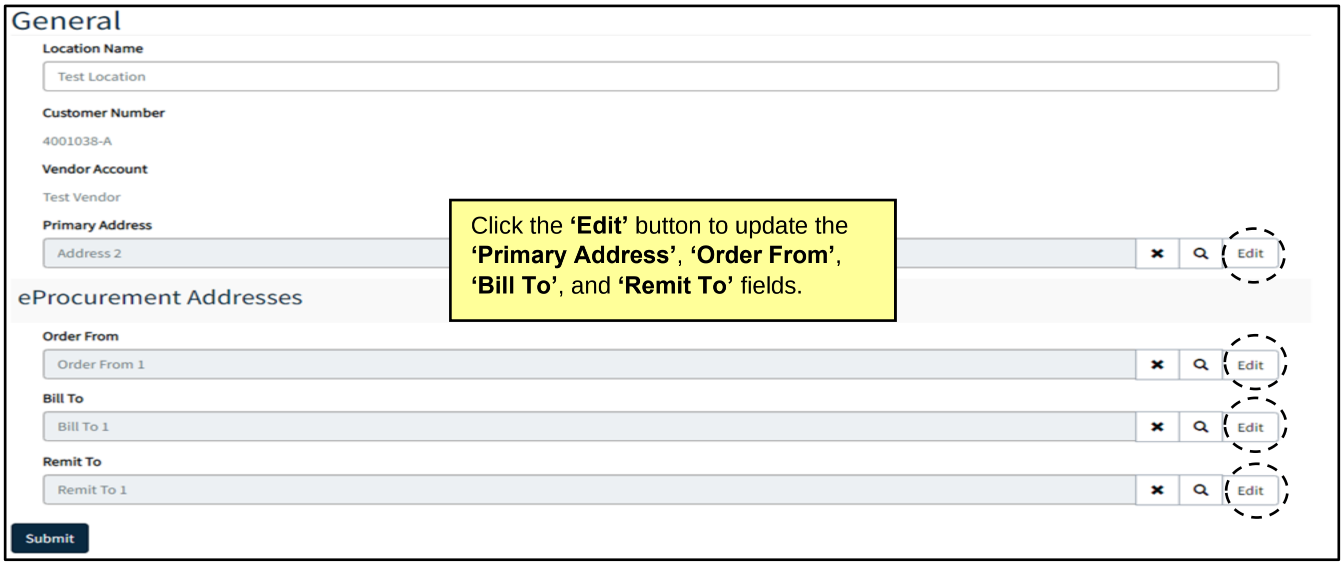


2. The **'Location Name'** field is a free text field. To edit **'Location Name'**, click into the field and update.

3. The **'Primary Address'**, **'Order From'**, **'Bill To'**, and **'Remit To'** fields can be edited by clicking the **'Edit'** button next to them. After clicking the **'Edit'** button, the individual details of the records can be updated. Once the updates are made, click the **'Submit'** button, and the system will return to the **'Edit Locations'** screen.

4. The **'Primary Address'**, **'Order From'**, **'Bill To'**, and **'Remit To'** fields can be replaced with a different record by clicking the magnifying glass next to them, selecting a different record, and clicking **'Select'**.

5. Once all the necessary updates are made, click the **'Submit'** button on the **'Edit Locations'** screen to finalize the changes.

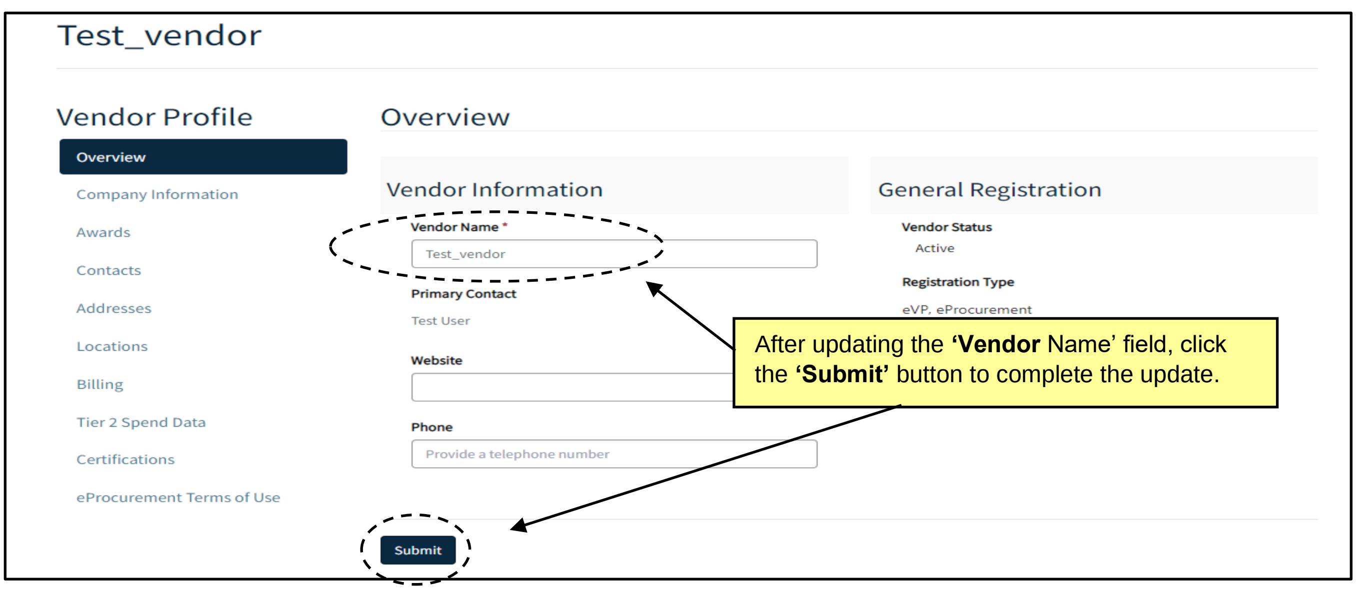


VIII. Updating the Vendor Name

1. Click on the '**Overview'** or the **'Company Information'** tabs from the navigation panel on the left-hand side of the screen.

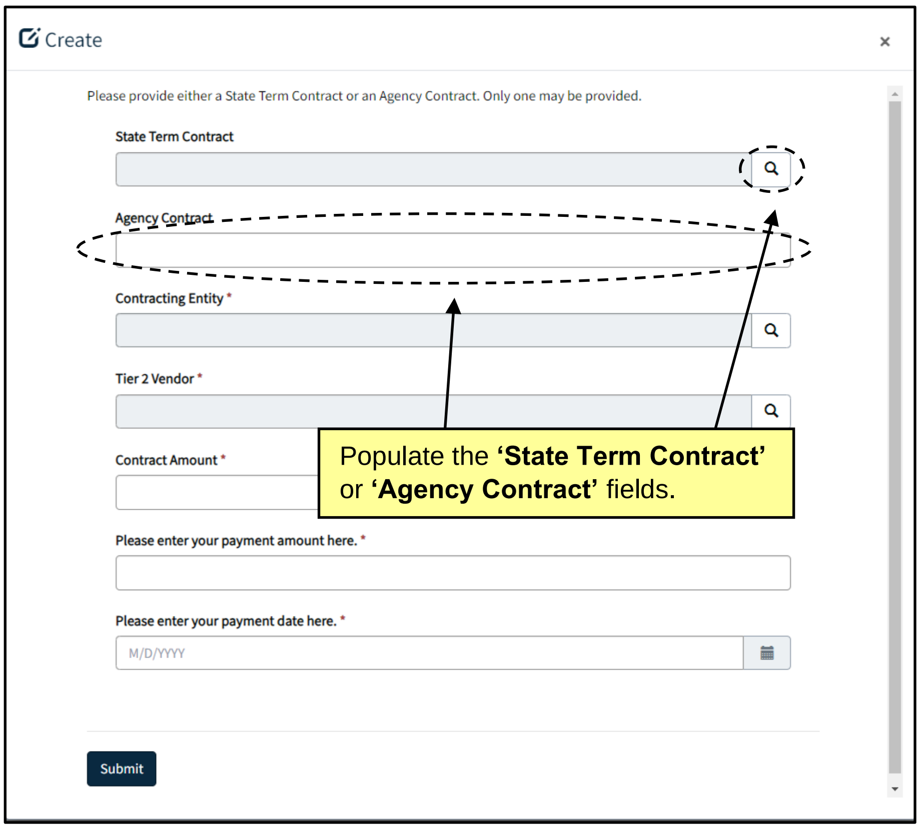
2. The **'Vendor Name'** field is a free text field. Click on the field and make any necessary changes.

3. Scroll down to the bottom of the page and click the **'Submit'** button to finalize the change.



IX. Adding Tier 2 Spend Data

1. Click on the **'Tier 2 Spend Data'** tab from the navigation panel on the left-hand side of the screen.
2. Select the **'Add Tier 2 Spend Data'** button.
3. Next, populate the **'State Term Contract'** or **'Agency Contract'** fields.
   a. A **'State Term Contract'** can be added by clicking the magnifying glass next to the field, checking the box next to the relevant state term contract, and clicking the **'Select'** button.
   b. The **'Agency Contract'** field is a free text field. An agency contract can be added by clicking the field and typing the agency contract number.



4. Click the magnifying glass next to the **'Contracting Entity'** field, find the appropriate North Carolina entity, select the check box next to them, and click the **'Select'** button.
5. Next, select the magnifying glass next to the **'Tier 2 Vendor'** field, find the appropriate vendor, select the check box next to them, and click the **'Select'** button.
6. Click the **'Contract Amount'** field and type in the contract amount.
7. Click the **'Please enter your payment amount here'** field and enter the payment amount.

8. Click the **‘Please enter your payment date here’** field and type in the or select the payment date using the date picker.

9. Once all required fields are populated, click the **‘Submit’** button. The new Tier 2 Spend Data record should now be visible on the Tier 2 Spend Data page.

   Note: Tier 2 Spend Data records can be edited. To edit a Tier 2 Spend Data record. Click the drop-down arrow next to the record and select the **‘View/Update’** option. Make any necessary changes and click the **‘Submit’** button.