Searching Registered Vendors

Introduction

Public Vendor Search is a tool that can be used to search for vendors that have a complete registration within the electronic Vendor Portal (eVP). It can be reached by clicking on the **Browse Vendors** button or the **Vendors** link on the public electronic Vendor Portal home page.



Learning **Objectives**

At the end of this job aid, **you will be able to**:

- Use basic search filters to refine a search.
- Use advanced search filters to refine a search.
- Export search results into Excel.

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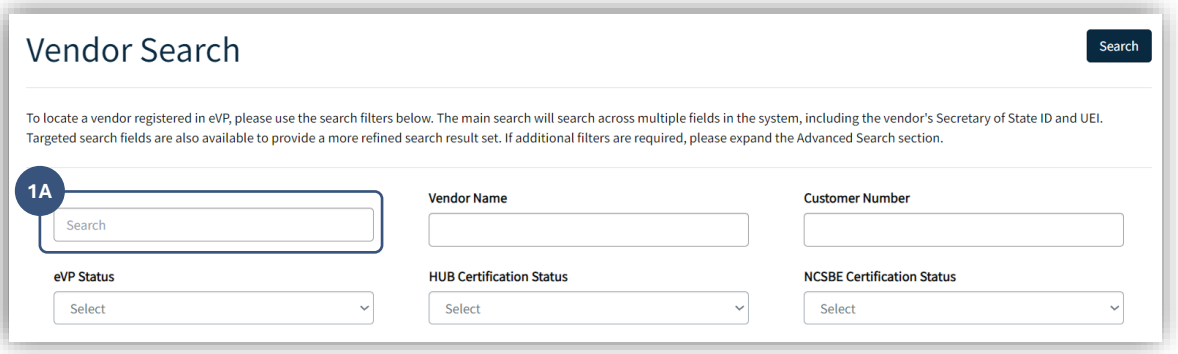
Search Filters

1 Search filters can be used to refine a search to receive more focused search results. The search filters that can be used for the Public Vendor Search are listed below.

A. **Main Search Bar:** The first field on the page and is a free text field (prepopulated with "Search" before any text is entered). It can be used to search across multiple fields in the system.
B. **Vendor Name:** This filter is a free text field. Enter any known portion of a vendors business name in this filter.
C. **Customer Number:** While going through the registration process, vendors are assigned a customer number. If a vendors customer number is known, it can be entered into this filter to return the associated vendor account.
D. **eVP Status:** This filter is a drop-down field that can be used to filter results based on the vendors account status. This drop-down field has the following selections:

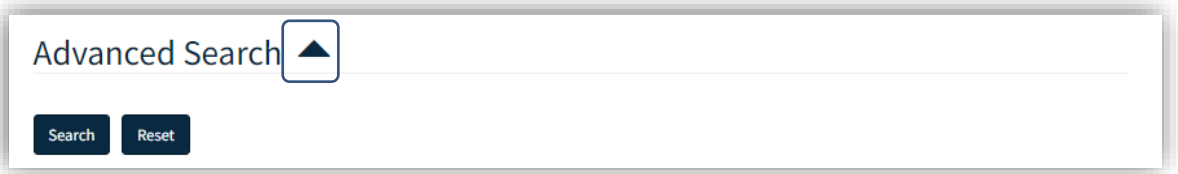
- **Active**
- **Pending**
- **Debarred**

E. **HUB Certification Status:** This filter is a drop-down field and can be used to filter results based on a vendors Historically Underutilized Business (HUB) certification status. The possible selections are Not Certified and Certified.
F. **NCSBE Certification Status:** This filter is a drop-down field and can be used to filter results based on a vendors North Carolina Small Business Enterprise (NCSBE) certification status. The possible selections are Not Certified and Certified.



Advanced Search Filters

2 In addition to the basic search filters, the public vendor search has advanced search filters. Click the arrow to the right of **Advanced Search** to expand the screen and view additional filters.



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A. NC eProcurement: This section can be used to filter search results based on a vendors NC eProcurement registration characteristics.

- The **Registration Date From** and **Registration Date To** filters can be used to filter results based on when a vendor registered. The **Registration Date From** and **Registration Date To** filters need to be entered using the format M/D/YYYY or by selecting the calendar icon to the left of the field and clicking on the appropriate date.
- The **NC eProcurement Registration Status** filter can be used to filter search results based on a vendors NC eProcurement status. This drop-down field has the following selections:
    i. **Active**
    ii. **Inactive**
    iii. **Debarred**

Setting this filter to **Active** is highly recommended to return ONLY vendors who can currently accept a Purchase Order via NC eProcurement.

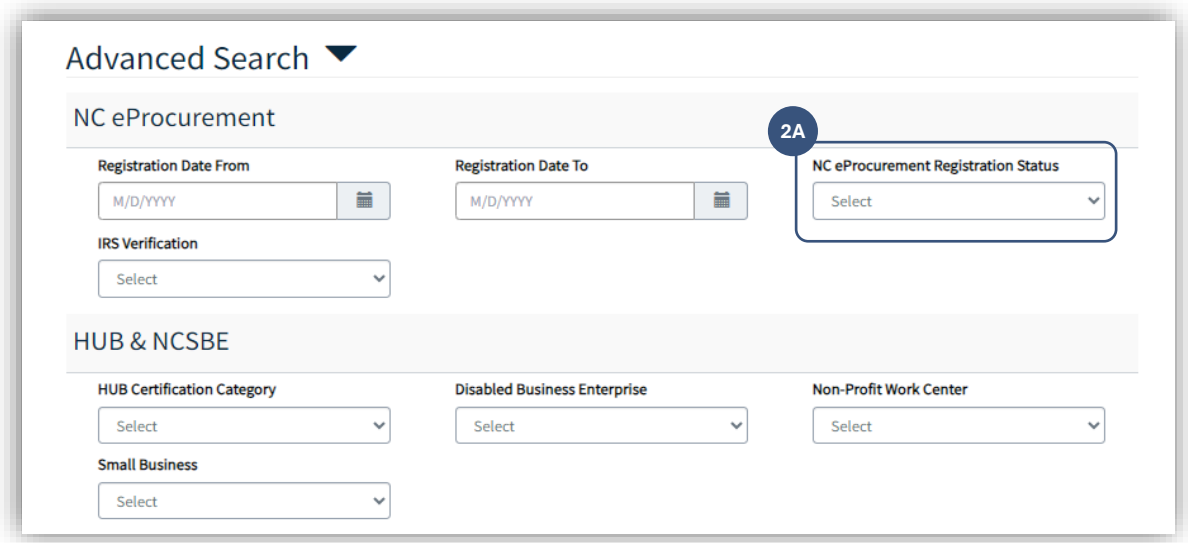
- The **IRS Verification** filter can be used to filter results based on a vendors IRS verification status. This drop-down field has the following selections:
    i. **Pending**
    ii. **Not Verified**
    iii. **Verified**
    iv. **Not Applicable**

B. HUB & NCSBE: This section can be used to filter search results based on a vendors HUB & NCSBE information.

- The **HUB Certification Category** filter can be used to filter results based on the specific HUB Certification Category the vendor selected while applying for HUB certification. This drop-down field has the following selections:
    i. **Black**
    ii. **Hispanic**
    iii. **Asian American**
    iv. **American Indian**
    v. **Female**
    vi. **Disabled**
    vii. **Disadvantaged**

- The **Disabled Business Enterprise** filter can be used to filter results based on a vendors self-reported Disabled Business Enterprise status. The possible selections are **No** and **Yes**.
- The **Non-Profit Work Center** filter can be used to filter results based on a vendors self-reported Non-Profit Work Center status. The possible selections are **No** and **Yes**.
- The **Small Business** filter can be used to filter results based on a vendors self-reported Small Business status. The possible selections are **No** and **Yes**.

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C. Contractor Services: This section has multiple filters that can be used to filter results based on the contractor services section of a vendors account.

- The **Contractor Category** can be used to filter results based on the specific contractor categories that vendors have selected. This drop-down field has the following selections:
    i. **All**
    ii. **Architectural Services**
    iii. **Engineering Services**
    iv. **General Contractor**
    v. **General Trades/Sub Contractor**
    vi. **Electrical Contractor**
    vii. **Mechanical/Heating Contractor**
    viii. **Plumbing/Fire Sprinkler Systems Contractor**

- The **Construction License** filter can be used to filter results based on whether a vendor selected a construction license on the contractor services section a vendors account. The possible selections are **No** and **Yes**.

- The **General/Electrical Contractor Limitation** filter can be used to filter search results by the General/Electrical Contractor Limitation listed on a vendors account. This drop-down field has the following selections:
    i. **None**
    ii. **Limited**
    iii. **Intermediate**
    iv. **Unlimited**

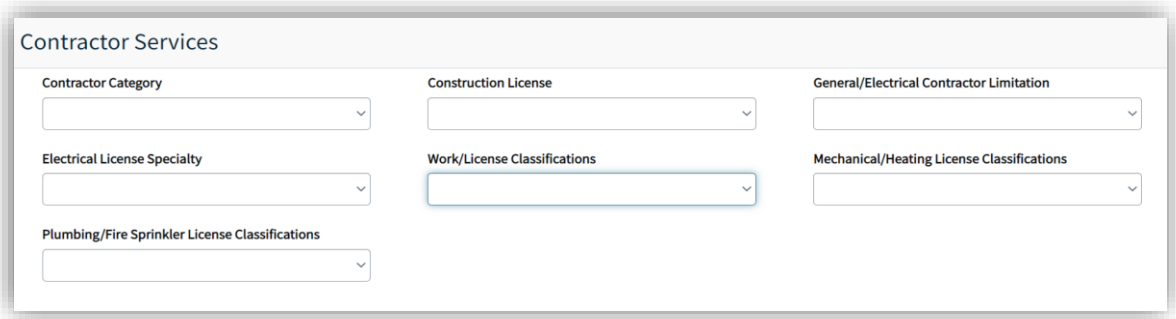
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- The **Electrical License Specialty** filter can be used to filter search results by the Electrical License Specialty listed on a vendors account. This drop-down field has the following selections:
    i. **SP – EL**
    ii. **SP – PH**
    iii. **SP – WP**
    iv. **SP – ES**
    v. **SP – SFD**
    vi. **SP – LV**
    vii. **SP – SP**

- The **Work/License Classification** filter can be used to filter search results by the Work/License Classification listed on a vendors account. This drop-down field has the following selections:
    i. **Building**
    ii. **Residential**
    iii. **Highway**
    iv. **Public Utilities**
    v. **Unclassified**

- The **Mechanical/Heating License Classification** filter can be used to filter search results by the Mechanical/Heating License Classification listed on a vendors account. This drop-down field has the following selections:
    i. **H-1-I**
    ii. **H-1-II**
    iii. **H-2**
    iv. **H-3-I**
    v. **H-3-II**

- The **Plumbing/Fire Sprinkler License Classifications** filter can be used to filter search results by the Plumbing/Fire Sprinkler License Classifications listed on a vendors account. This drop-down field has the following selections:
    i. **P-I**
    ii. **P-II**
    iii. **FS**
    iv. **FP**

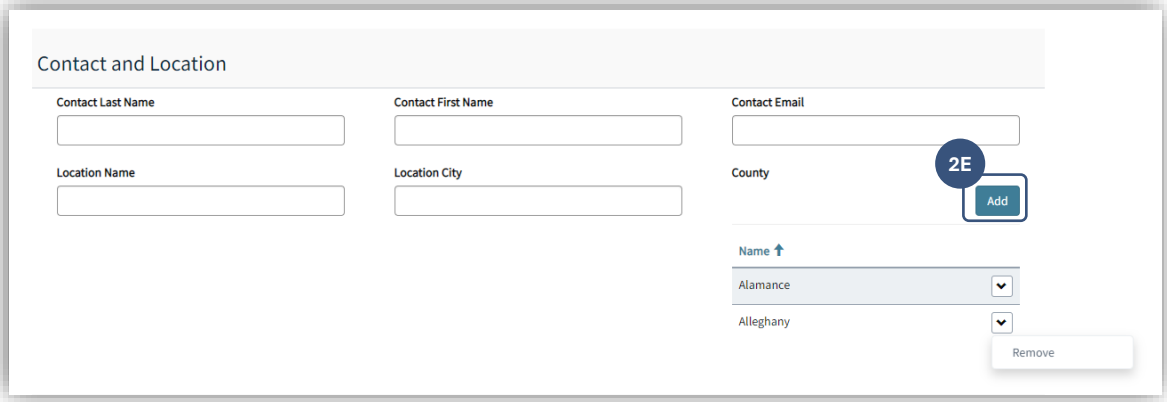


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D.Contact and Location: This section has multiple filters that can be used to refine search results by contacts or locations listed on a vendors account.

- **Contact Last Name**, **Contact First Name**, and **Contact Email:** Can be used when a vendors contact information is known to return the associated vendors account. These filters are free text fields.
- **Location Name** and **Location City:** Can be used when a vendors address information is known to return the associated vendors account. These filters are free text fields.
- **County:** To add a county to the filter, click the **Add** button. On the subsequent screen, check the box next to any county and click the **Add** button. It is possible to select multiple counties in the same search.

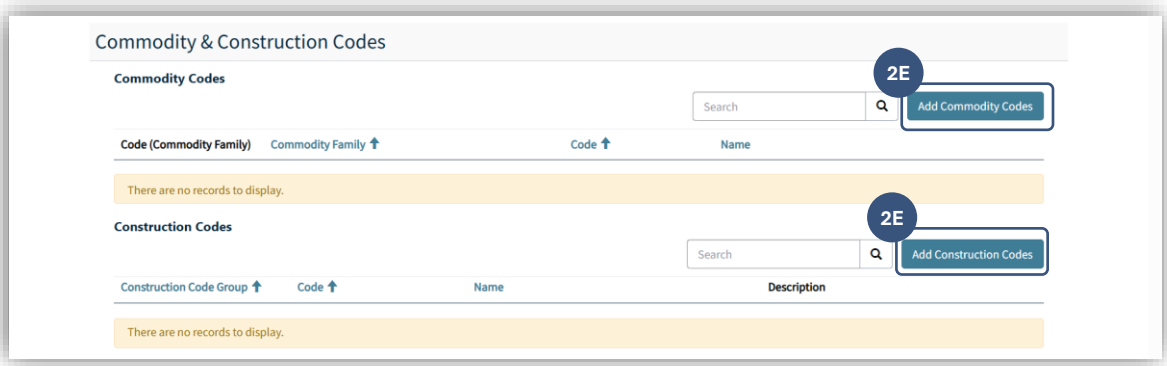
Click the arrow next to any added county and select **Remove** to remove it from the filter.



E. Commodity & Construction Codes: Vendors can indicate the specific goods or services they provide in their accounts. This section can filter search results based on the construction or commodity codes vendors have selected.

- **Commodity Codes:** To add a commodity code to the filter, select the **Add Commodity Codes** button and use the search bar on the subsequent screen to search for relevant commodity codes by keyword or number. Click the check box next to relevant codes and click the **Add** button.
- **Construction Codes:** To add a construction code to the filter, select the green **Add Construction Codes** button and use the search bar to search for any relevant construction codes by keyword or number. Click the check box next to relevant codes and click the **Add** button.

Click the arrow next to any added Construction or Commodiry code and select **Remove** to remove it from the filter.



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Search Results

3 After all desired filters are set, a search can be executed by selecting the **Search** button at the top or bottom of the page, or by hitting "Enter" on the keyboard. The search results will populate in a table format and can be exported. Click **Reset** to clear all search filters.

A. Contact information for the vendors main contact will be displayed adjacent to the vendors name.

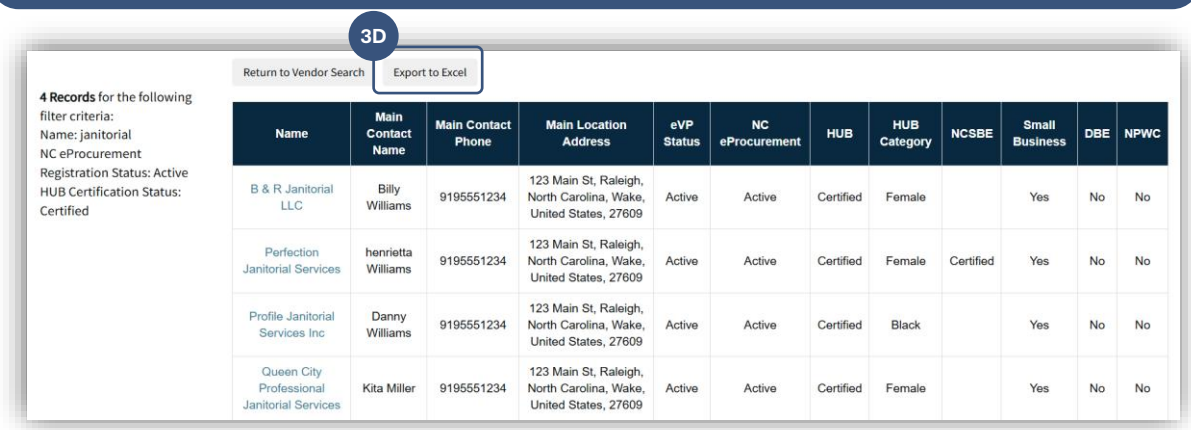
Vendor contacts designated as **Account Owner** can edit account information, including adding new contacts.

B. The **eVP Status**, **NC eProcurement**, **HUB**, and **NCSBE** columns show the vendors registration statuses. **Active** in the **NC eProcurement** column indicates the vendor can currently accept a PO.

C. Clicking on the value in the **Name** column will open a page with more information on that vendor.

D. Search results can be exported by clicking the **Export to Excel** button.

- The search filter criteria will display on the left side of the search results screen as well as at the bottom of any exported Excel files.
- Clicking **Return to Vendor Search** will return the user to the previous search page where filters can be adjusted for further accuracy.



Name	Main Contact Name	Main Contact Phone	Main Location Address	eVP Status	NC eProcurement	HUB	HUB Category	NCSBE	Small Business	DBE	NPWC
B & R Janitorial LLC	Billy Williams	9195551234	123 Main St, Raleigh, North Carolina, Wake, United States, 27609	Active	Active	Certified	Female		Yes	No	No
Perfection Janitorial Services	henrietta Williams	9195551234	123 Main St, Raleigh, North Carolina, Wake, United States, 27609	Active	Active	Certified	Female	Certified	Yes	No	No
Profile Janitorial Services Inc	Danny Williams	9195551234	123 Main St, Raleigh, North Carolina, Wake, United States, 27609	Active	Active	Certified	Black		Yes	No	No
Queen City Professional Janitorial Services	Kita Miller	9195551234	123 Main St, Raleigh, North Carolina, Wake, United States, 27609	Active	Active	Certified	Female		Yes	No	No