

NC electronic Vendor Portal

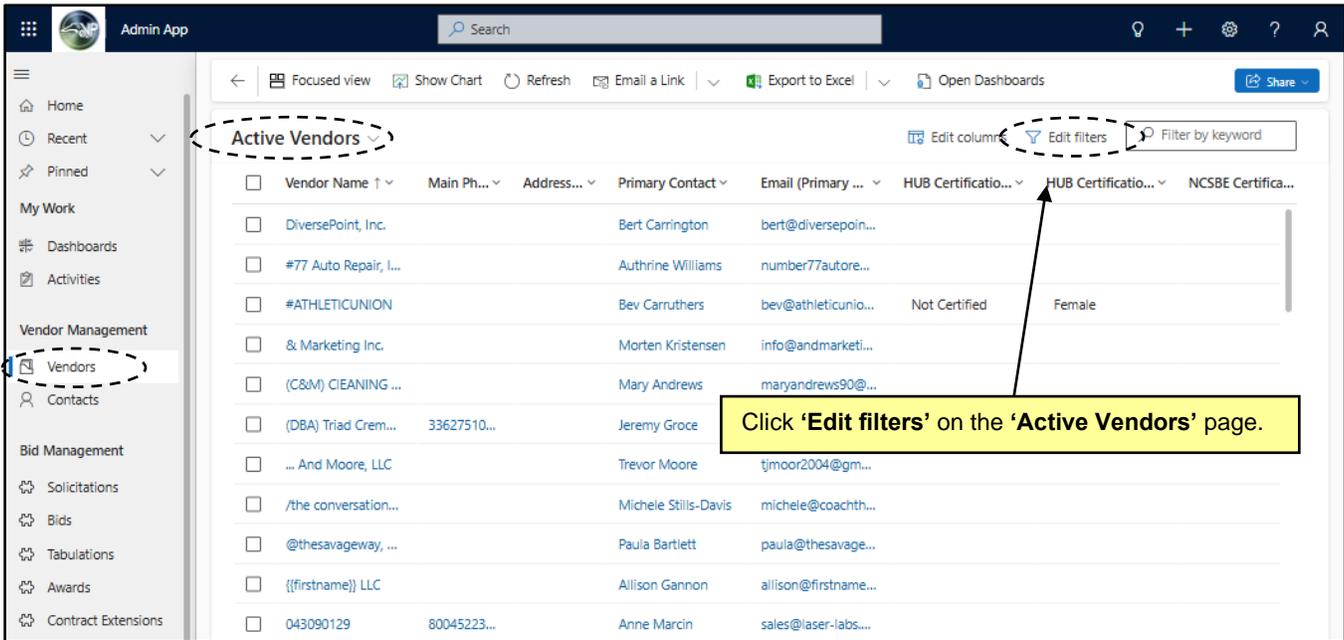


Searching for Vendors by Commodity Code (Agency App)

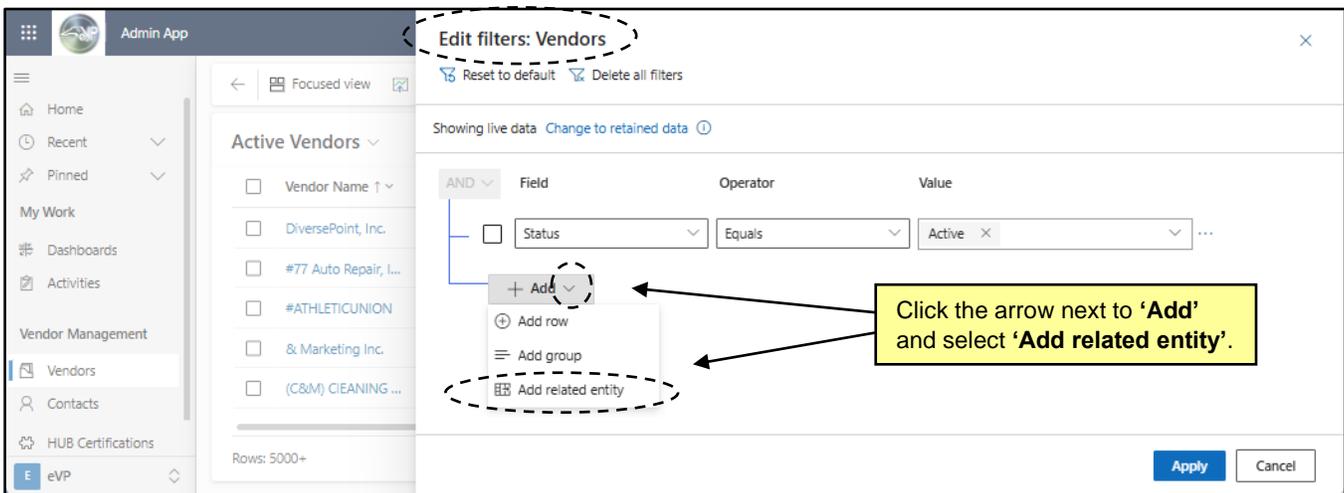
Procurement Users can generate a targeted list of vendors registered with a specific commodity code in the eVP Agency App via advanced filtering. That list will include the email address of each vendor's **'Primary Contact'** and can be exported to Excel.

I. Filtering Active Vendors by Commodity Code

1. From the **'Active Vendors'** page (or any preferred custom view that includes the **'Email (Primary Contact)'** field) in the **'Vendor Management'** section, click on **'Edit filters'**.



2. On the subsequent **'Edit filters: Vendors'** menu, click the dropdown arrow to the right of **'Add'** and select **'Add related entity'**.



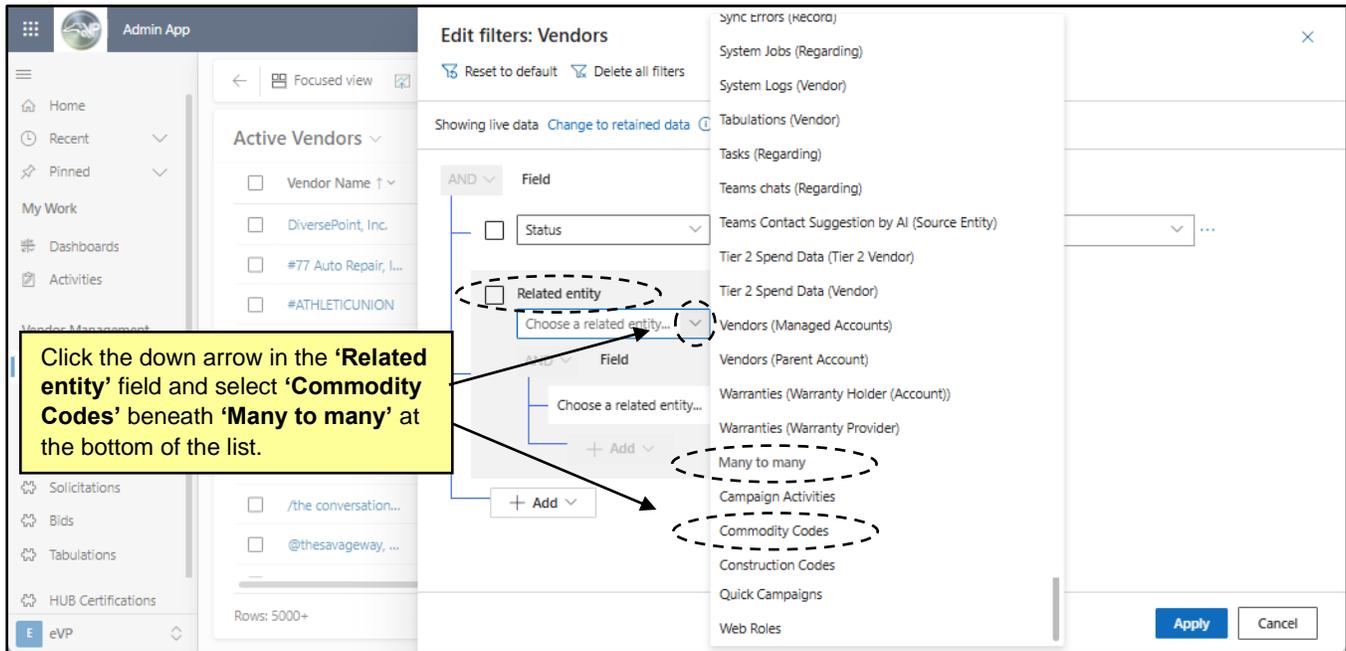
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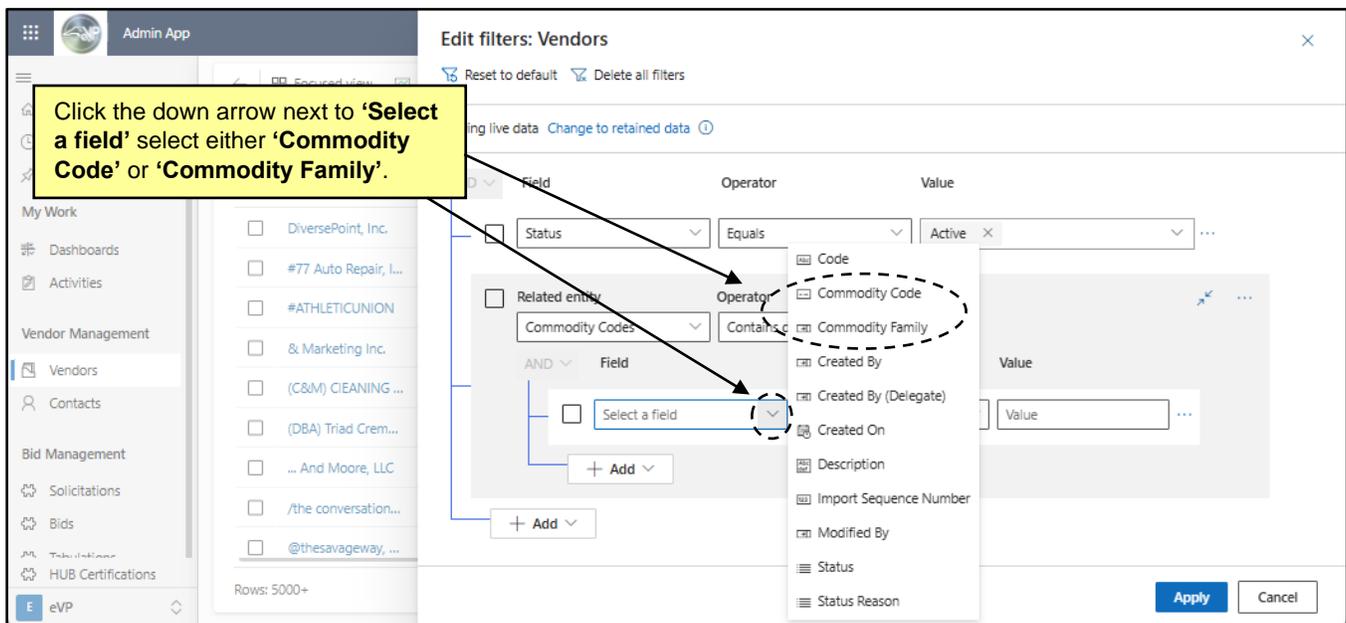


3. In the newly-visible **'Related entity'** field, click the down arrow to search for and select the **'Commodity Codes'** value under the **'Many to many'** section of the dropdown.

Note: Scroll directly down to the end of the list to find **'Commodity Codes'** a few values up from the bottom. There is another **'Commodity Codes (Commodity Codes)'** value visible near the top of the list, but that is not the correct value for this search.



4. In the **'Select a field'** box, click the down arrow and select either **'Commodity Code'** (six digits – more specific) or **'Commodity Family'** (4 digits – broader) from the dropdown.



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5. In the **'Value'** box, begin typing a commodity description. A dropdown with available selections will display. Select the description of the commodity code or family to be included in the search.

Note: In this screenshot "jan" was typed, and commodity code descriptions including "janitorial" options displayed.

Enter a commodity description in the **'Value'** field and select the one to be included in the search.

6. Click **'Apply'** to initiate the search.

Click **'Apply'** to initiate the search after all commodity filters have been selected.

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- The filtered search results will display back on the 'Active Vendors' page. Click the 'Export to Excel' button at the top of the screen to access the results, including the email address of the 'Primary Contact' via an editable Excel file.

The screenshot shows the 'Admin App' interface with a table of 'Active Vendors'. The 'Export to Excel' button is circled in red. A yellow callout box points to it with the text: 'Click 'Export to Excel' to generate an editable export of the filtered vendors.' The table has columns for Vendor Name, Main Phone, Address, Primary Contact, Email (Primary), HUB Certification, and NCSBE Certification. The 'Rows: 1536' indicator is also circled in red.

| Vendor Name | Main Ph... | Address... | Primary Contact | Email (Primary ... | HUB Certificatio... | HUB Certificatio... | NCSBE Certifica... |
|-----------------------|-------------|------------|---------------------|----------------------|---------------------|---------------------|--------------------|
| (C&A) CLEANING | | | Mary Andrews | maryandrews90@... | | | |
| | | | Tierra Wilson | tierra.wilson@121... | Certified | Black | Certified |
| | | | Alvin Borders | gregory.borders... | Certified | Black | |
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| 2LM SECOND LIF... | | | Sharonda Josey | MICHELE.JOSEY@... | | | |
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