



Customer/Partner/Vendors

Revision History

| Date | Revision | Change by | Revision # |
|-------------|---|----------------------|-------------------|
| 8/4/17 | Document Creation | Claudette Martin-Wus | V1 |
| 3/21/18 | Enhancements to remove customer/partners and vendors and edit records | Sandra Alexander | V2 |
| 10/15/19 | Update BCDR Team email address | Lori Gorman | V3 |
| 04/11/22 | Update BCIC access instructions | Lori Gorman | V4 |

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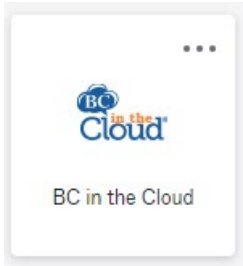
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Accessing the Customer/Partner/Vendors Tab

Step 1. Log into the tool.

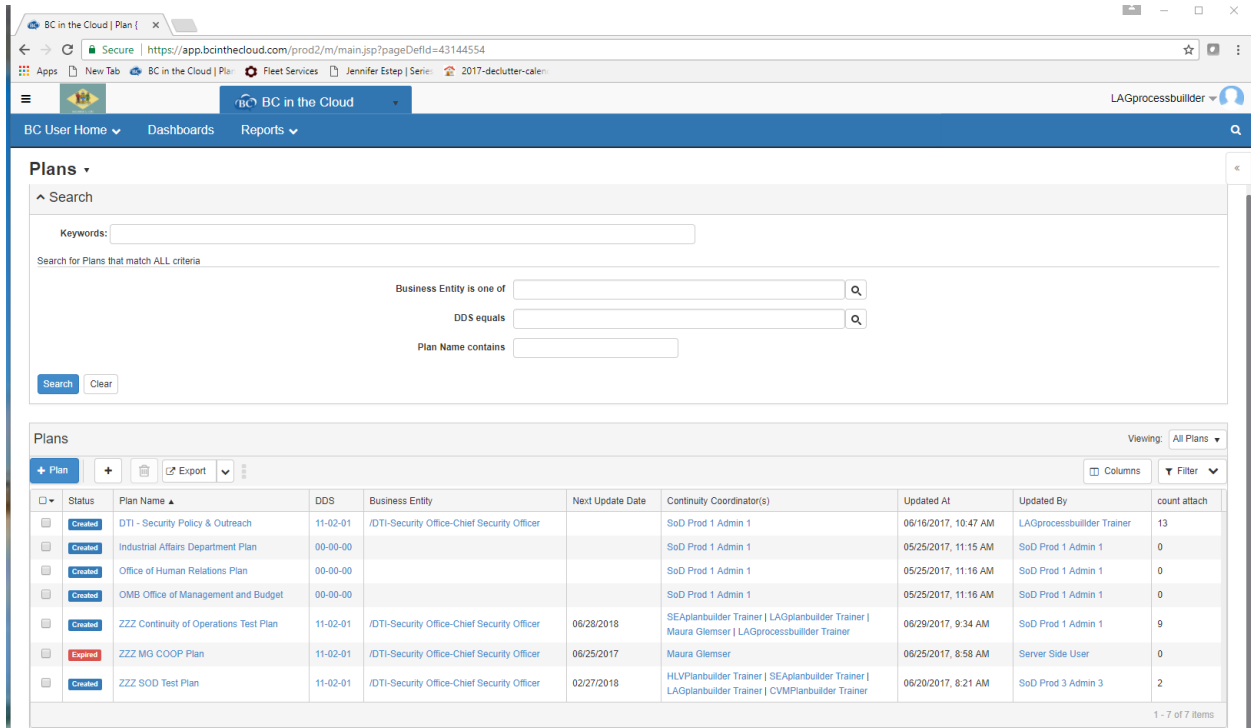
This application has been added to Delaware's SSO platform. Log into <https://ID.Delaware.gov> using your normal network credentials. Select the BCIC tile pictured below.



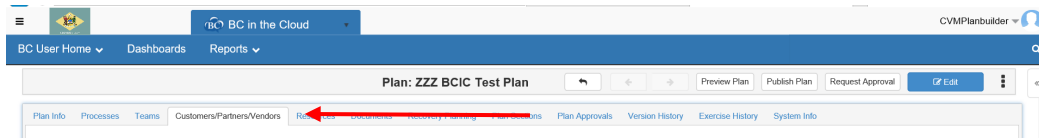
Step 2. Locate the Plan to be updated.

The screenshot shows the BC in the Cloud application interface. The top navigation bar includes 'BC User Home', 'Dashboards', and 'Reports'. A left-hand navigation menu is open, showing options: 'BIA', 'Plans', 'Processes', 'Employees', 'Process Teams', and 'To-Dos'. A red arrow points from the 'Plans' option to a callout box that says 'Go to the plan tab or select Manage Plans.' Below the navigation menu, there are three main action buttons: 'Manage Processes' (with a blue folder icon), 'Manage Plans' (with a red folder icon and a green checkmark), and 'Manage Exercises/Tests' (with a blue folder icon and a red X). The main content area on the right is titled 'My Planning Items' and contains two sections: 'My Processes' and 'My To-Dos'. Both sections have a 'Columns' and 'Filter' dropdown and currently display 'No records to display.'

Step 3. Select the Plan you wish to update by clicking on the plan name.

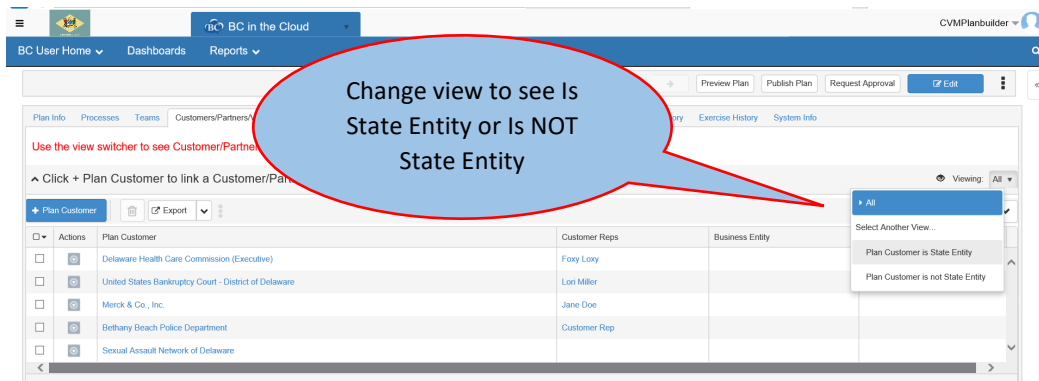


Step 4. Click Customers/Partners/Vendors tab



*Note: Customer/Partners and Vendors are pre-loaded. Any necessary additions/changes should be reported to your assigned BCDR liaison or BCDR_Team@delaware.gov.

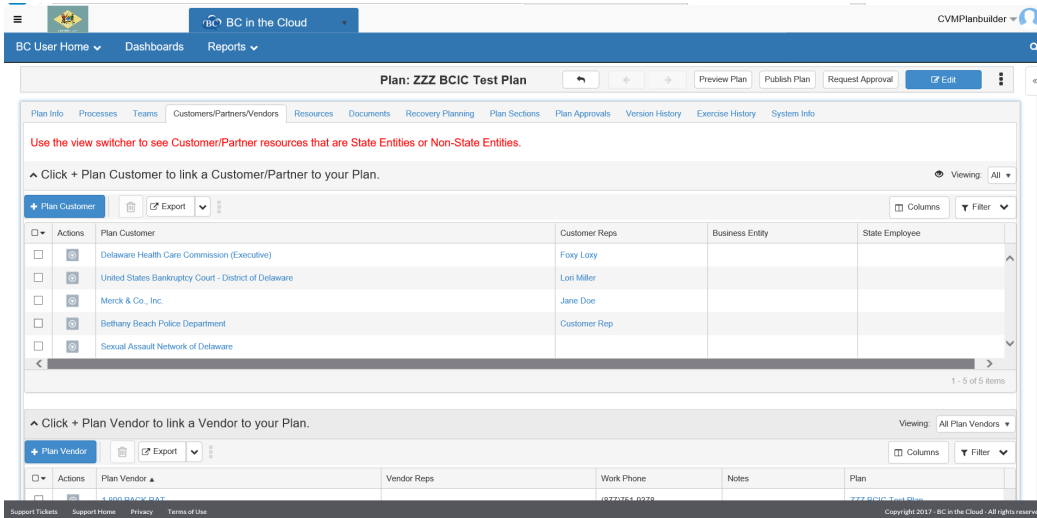
5. View Customer/Partner Types Assigned to Plan



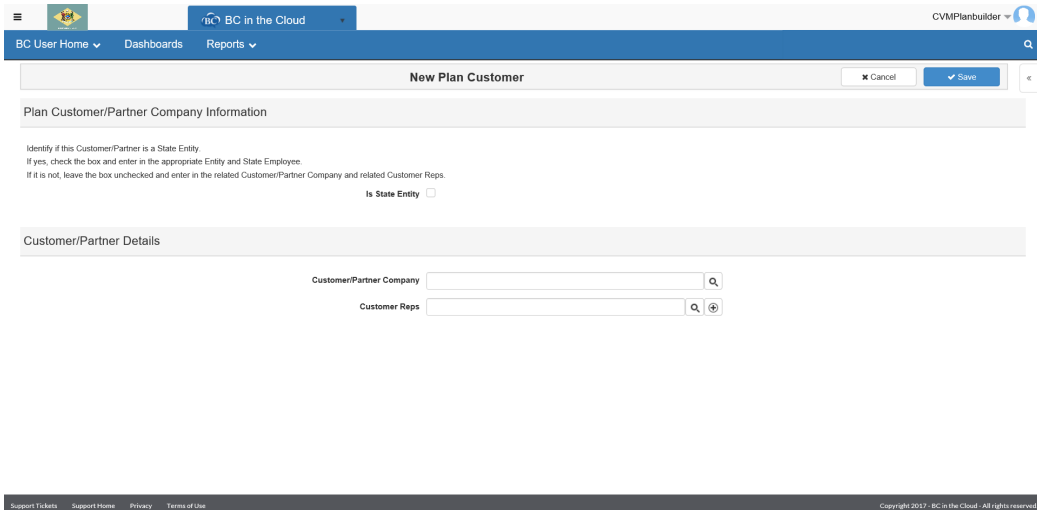
Assign Customer/Partner

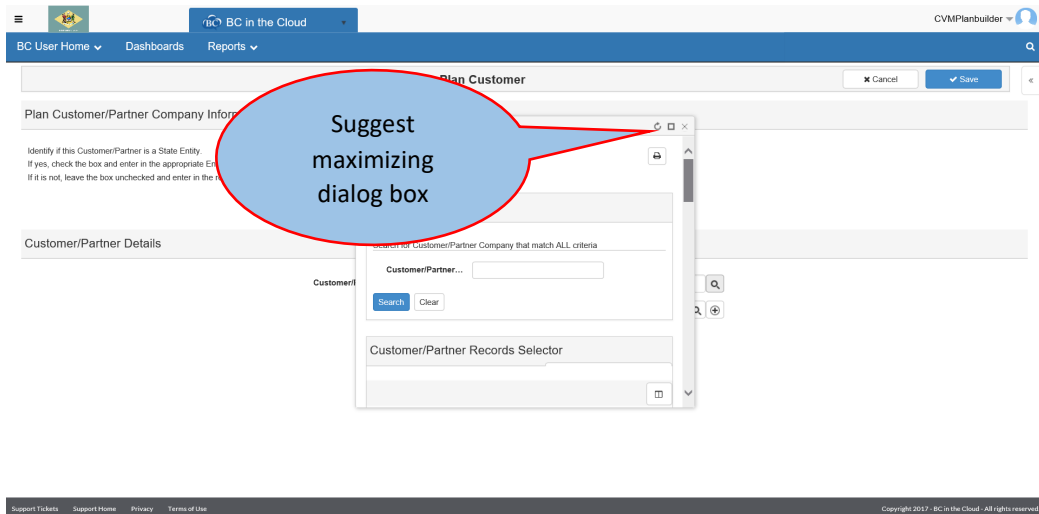
Customer/Partner *NOT* State Entity

Step 1. Click + Plan Customer button



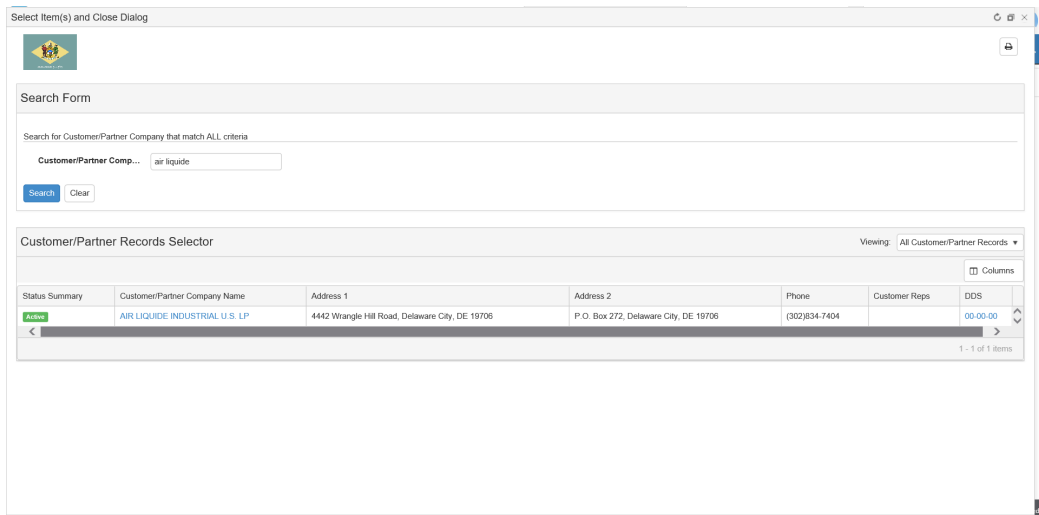
Step 2. Click the magnifying glass next to Customer/Partner Company field if *NOT* a State Entity. If Customer/Partner is a State Entity, see section titled "Customer/Partner Is State Entity"





- Enter search criteria, sort, or scroll to find the Organization name
- Click the organization name to assign to plan

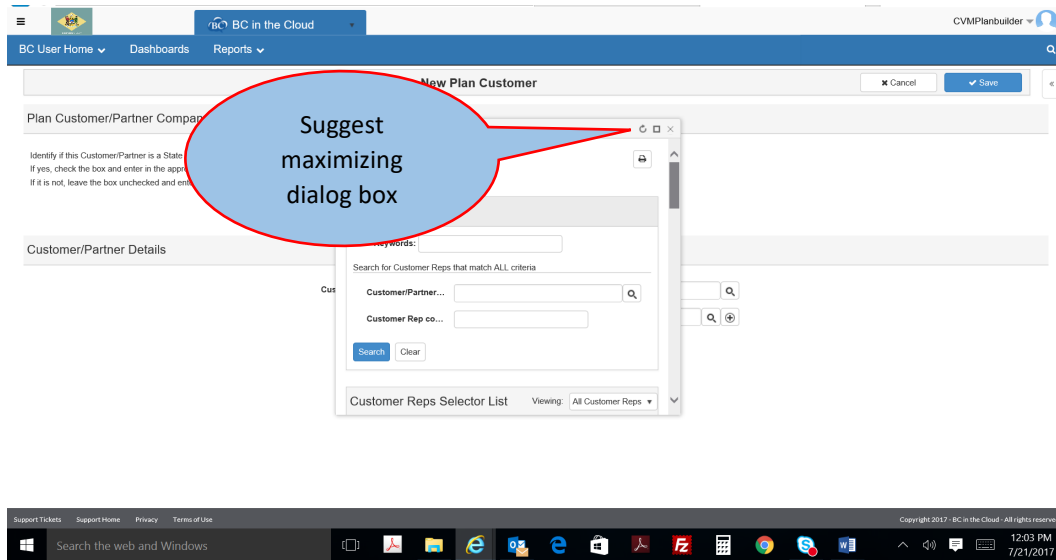
Step 3. Click on the customer/partner company name to assign to the plan



Assign Customer/Partner Rep

Customer/Partner *NOT* State Entity

Step 1. Click the magnifying glass next to Customer Rep field to see if rep already exists.



Step 2. Search by organization name or representative name that is part of that organization



Option: Search by Organization

- Enter search criteria
- Click the correct name

Select Item(s) and Close Dialog

Search Form

Keywords:

Search for Customer Reps that match

Customer/Partner equals

Customer Reps Selector

Attach Selected

Customer Rep

Customer/Partner: N/A

Foy Loxy

Lisa Flynn

Bill Porter

Regina McGirk

James Fletcher

Jan Steele

Foy Loxy

Maureen Nicholson

Customer/Partner Records Selector

Viewing: All Customer/Partner Records

| Status Summary | Customer/Partner Company Name | Address 1 | Address 2 | Pho... | Customer Reps | DDS |
|----------------|--|------------------|------------------------|--------|-------------------------------------|----------|
| Active | Commission On Interstate Cooperation (Legislative) | Legislative Hall | 411 Legislative Avenue | | James Fletcher@design-tab k12 de us | 00:00:00 |
| | Delaware Health Care Commission | 302 282-5450 | | | | 00:00:00 |
| | Director of Finance | 302-436-1000 | | | jeannette.steele@rsd.k12.de.us | 00:00:00 |
| | | (444)444-4444 | | | | 11-02-01 |
| | Financial Secretary | (302)436-1000 | | | maureen.nicholson@rsd.k12.de.us | 00:00:00 |

Viewing: All Customer Reps

Columns

Customer Rep ID

CRP00510

CRP00498

CRP00473

CRP00489

CRP00505

CRP00480

CRP00511

CRP00485

Suggest maximizing dialog box

*Note: If you do not see the expected Customer/Partner Rep, change the Viewing Selector

BC User Home Dashboards Reports

BC in the Cloud

CVMPlanbuilder

Plan: ZZZ BCIC Test Plan

Preview Plan Publish Plan Request Approval Edit

Plan Info Processes Teams Customers/Partners/Vendors Resources Documents Version History Exercise History System Info

Use the view switcher to see Customer/Partner resources

Click + Plan Customer to link a Customer/Partner

+ Plan Customer Export

Actions Plan Customer

| Plan Customer | Updated By |
|---|--|
| Delaware Health Care Commission (Executive) | 06/12/2017, 10:40 AM LAGprocessbuilder Trainer |
| United States Bankruptcy Court - District of Delaware | 06/12/2017, 10:08 AM LAGplanbuilder Trainer |
| Merck & Co., Inc. | 06/12/2017, 10:07 AM LAGplanbuilder Trainer |
| Bethany Beach Police Department | 06/12/2017, 10:00 AM LAGplanbuilder Trainer |
| Sexual Assault Network of Delaware | 05/19/2017, 1:26 PM SEAGplanbuilder Trainer |

1 - 5 of 5 items

Check Viewing Selector to Plan Customer is not State Entity if you do not see the added organization

Select Item(s) and Close Dialog

Search Form

Search for Customer/Partner Company that match ALL criteria

Customer/Partner Comp... liquide

Customer/Partner Records Selector

Viewing: All Customer/Partner Records

| Status Summary | Customer/Partner Company Name | Address 1 | Address 2 | Phone | Customer Reps | DDS |
|----------------|-------------------------------|---|---------------------------------------|---------------|---------------|----------|
| Active | ARLIQUIDE INDUSTRIAL U.S. LP | 4442 Wrangle Hill Road, Delaware City, DE 19706 | P.O. Box 272, Delaware City, DE 19706 | (302)834-7404 | | 00:00:00 |

1 - 1 of 1 items

Option: Search by Customer Rep Name

The screenshot shows a web browser window with the URL <https://app.bcinthecloud.com/prod2/m/main.jsp>. The page title is "Select Item(s) and Close Dialog". Below the title is a search form with a "Keywords:" input field. Below that is a search criteria section with "Search for Customer Reps that match ALL criteria". There are two search filters: "Customer/Partner equals" and "Customer Rep contains" with the value "anderson". There are "Search" and "Clear" buttons. Below the search form is a "Customer Reps Selector List" with a "Viewing: All Customer Reps" dropdown and a "Columns" button. The table below has the following data:

| Customer Rep | Title | Work Number | Work Fax | Email Address | DCS | Customer Rep ID |
|---|-------|----------------|----------|----------------------------|----------|-----------------|
| Customer/Partner: N/A | | | | | | |
| Stanley Anderson | IRM | (302) 739-4277 | | | 00-00-00 | CRP00035 |
| Customer/Partner: OSIS NCO Financial System | | | | | | |
| Lisa Anderson | | (614) 791-4710 | | lisa.anderson@mcogroup.com | 00-00-00 | CRP00116 |

At the bottom right of the table, it says "1 - 2 of 2 Items". The Windows taskbar at the bottom shows the time as 11:03 AM on 3/21/2018.

Enter portion of existing customer representative name

- Click the correct name

The screenshot shows the "New Plan Customer" form in the BC in the Cloud application. The form has a "Cancel" button and a "Save" button. Below the form is a section for "Plan Customer/Partner Company Information".

- Click Save

Add a new Customer/Partner Rep not currently in BCIC

Customer/Partner Representative *NOT* State Entity

Step 1. Click + Button next to Customer Reps field

BC User Home | Dashboards | Reports | BC in the Cloud | CVMPlanbuilder

New Plan Customer [Cancel] [Save]

Plan Customer/Partner Company Information

Identify if this Customer/Partner is a State Entity
 If yes, check the box and enter in the appropriate Entity and State Employee
 If it is not, leave the box unchecked and enter in the related Customer/Partner Company and related Customer Reps.

Is State Entity

Customer/Partner Details

Customer/Partner Company [input field]

Customer Reps [input field]

Step 2. Enter the details of for the Customer/Rep

BC User Home | Dashboards | Reports | BC in the Cloud | CVMPlanbuilder

New Plan Customer [Cancel] [Save]

Plan Customer/Partner Company Information

Identify if this Customer/Partner is a State Entity
 If yes, check the box and enter in the appropriate Entity and State Employee
 If it is not, leave the box unchecked and enter in the related Customer/Partner Company and related Customer Reps.

Customer/Partner Details

Customer/Partner Company [input field]

Customer Reps [input field]

New Customer Rep [Close]

Quick Create

Customer Rep ID: CRP00527

Work Number: [input field]
Format: (###)###-####

First Name: [input field]

Ext.: [input field]

Last Name: [input field]

Cell Number: [input field]
Format: (###)###-####

Title: [input field]

[Save] [Cancel]

Suggest maximizing dialog box

Step 3. Click Save

Customer/Partner Is State Entity

BC User Home | Dashboards | Reports | BC in the Cloud | CVMPlanbuilder

Plan: ZZZ BCIC Test Plan [Preview Plan] [Publish Plan] [Request Approval] [Edit]

Plan Info | Processes | Teams | Customers/Partners/Vendors | Resources | Documents | Recovery Planning | Plan Sections | Plan Approvals | Version History | Exercise History | System Info

Use the view switcher to see Customer/Partner resources that are State Entities or Non-State Entities.

Click + Plan Customer to link a Customer/Partner to your Plan.

Viewing: All

| Plan Customer | Customer Reps | Business Entity |
|---|---------------|-----------------|
| Delaware Health Care Commission (Executive) | Foxy Loxy | |
| United States Bankruptcy Court - District of Delaware | Lori Miller | |
| Merck & Co., Inc. | Jane Doe | |
| Bethany Beach Police Department | Customer Rep | |
| Sexual Assault Network of Delaware | | |

Switch view to Plan Customer is State Entity

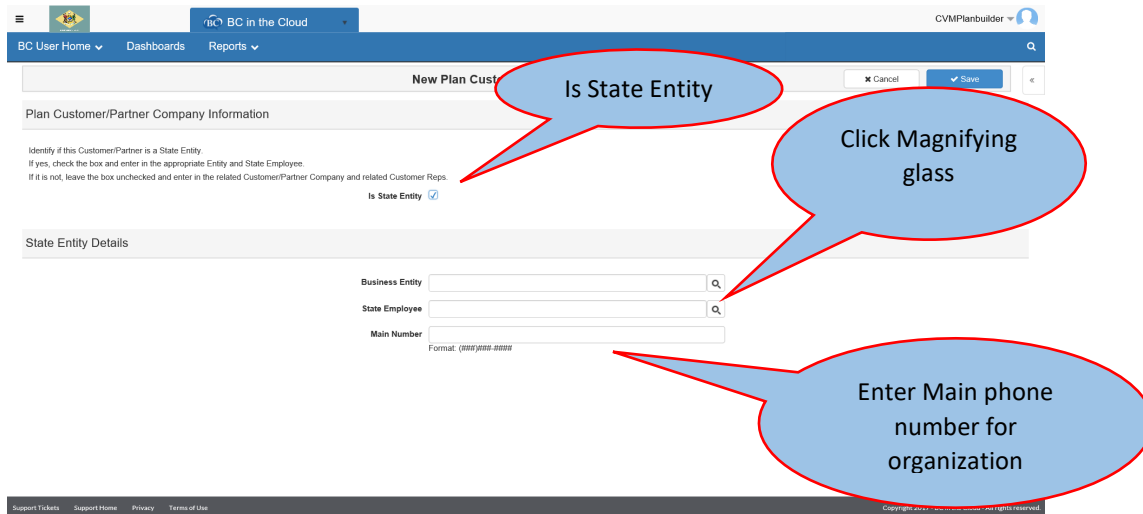
Customer/Partner NOT State Entity

Step 1. Click + Plan Customer button

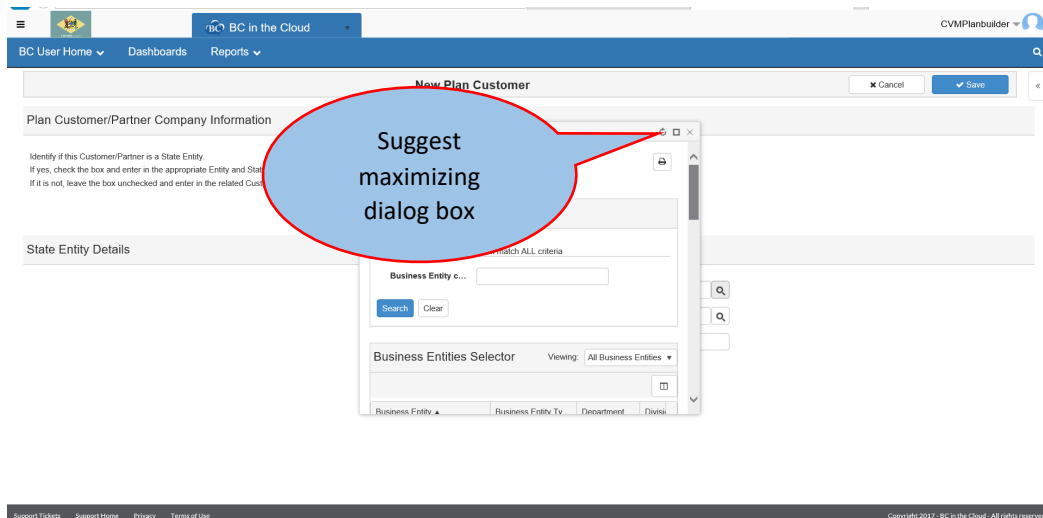
If Customer/Partner is a State organization, check box Is State Entity. This will isolate the list to only State organizations.

Update the following:

- Business Entity
- State Employee
- Main Number



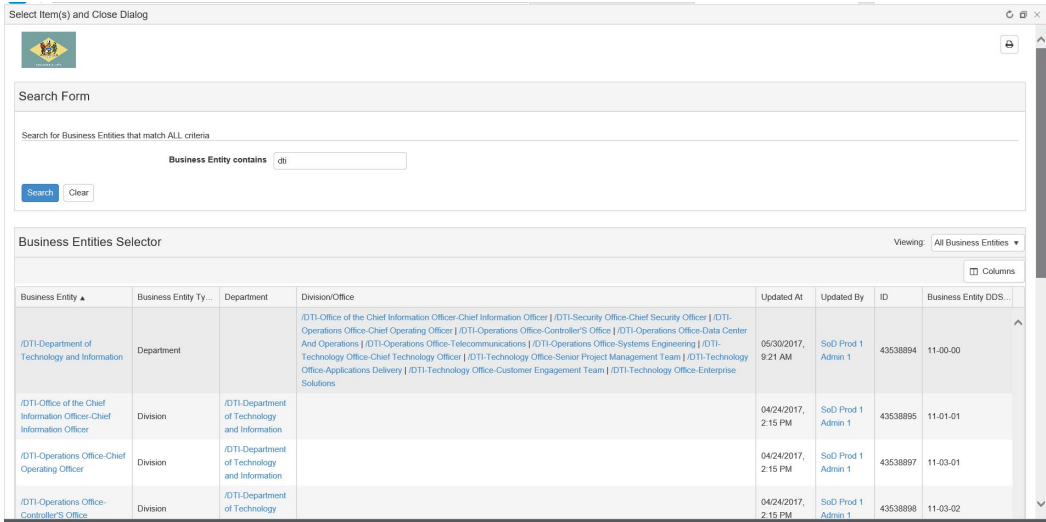
Assign Business Entity Steps



Step 1. Click magnifying glass next to Business Entity

Step 2. Enter search criteria

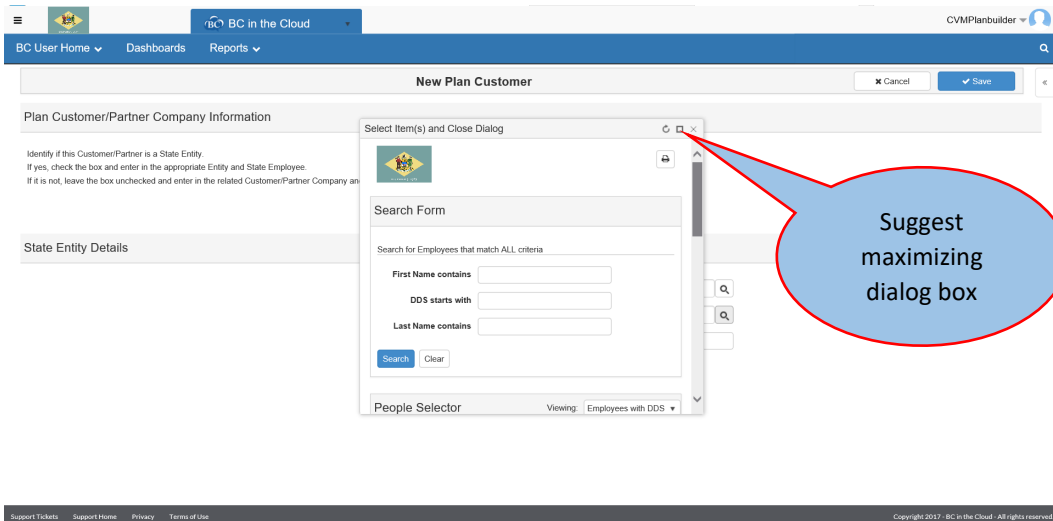
Step 3. Click the correct Business Entity name



Assign State Employee Steps

Step 1. Type the State Employee's name directly into the State Employee field or click the magnifying glass next to State Employee field

Step 2. Enter a combination of search criteria, sort, or scroll to find the Plan Owner name



Step 3. Click the checkbox next to the correct name

Step 4. Click the Attach Selected button

Select Item(s) and Close Dialog

Search Form

Search for Employees that match ALL criteria

First Name contains

Last Name contains

Search

DDS starts with

People Selector Viewing: Employees with DDS

| <input type="checkbox"/> | DDS | Employee ID | Employee | First Na... | Last Name | Work Pho... | Work Email Address |
|-------------------------------------|----------|-------------|----------------------|-------------|------------|---------------|----------------------------------|
| <input checked="" type="checkbox"/> | 11-02-01 | 111910 | Claudette Martin-Wus | Claudette | Martin-Wus | (302)739-9636 | claudette.martin-wus@state.de.us |
| <input type="checkbox"/> | 11-02-01 | | Danka Prilepkova | Danka | Prilepkova | (302)739-9581 | danka.prilepkova@state.de.us |
| <input type="checkbox"/> | 11-02-01 | | Kelsie Jones | Kelsie | Jones | (302)739-... | kelsie.jones@state.de.us |
| <input type="checkbox"/> | 11-02-01 | | George Truitt | George | Truitt | (302)739-... | george.truitt@state.de.us |
| <input type="checkbox"/> | 11-02-01 | 55588 | Heather Volkmer | Heather | Volkmer | (302)739-9824 | heather.volkmer@state.de.us |
| <input type="checkbox"/> | 11-02-01 | 84405 | Joshua Fontello | Joshua | Fontello | (302)739-... | josh.fontello@state.de.us |

Step 5. Enter Business Entity's Main Phone Number

Step 6. Click Save

BC User Home | Dashboards | Reports | BC in the Cloud | CVMPlanbuilder

New Plan Customer

Plan Customer/Partner Company Information

Identify if this Customer/Partner is a State Entity.
 If yes, check the box and enter in the appropriate Entity and State Employee.
 If it is not, leave the box unchecked and enter in the related Customer/Partner Company and related Customer Reprs.

Is State Entity

State Entity Details

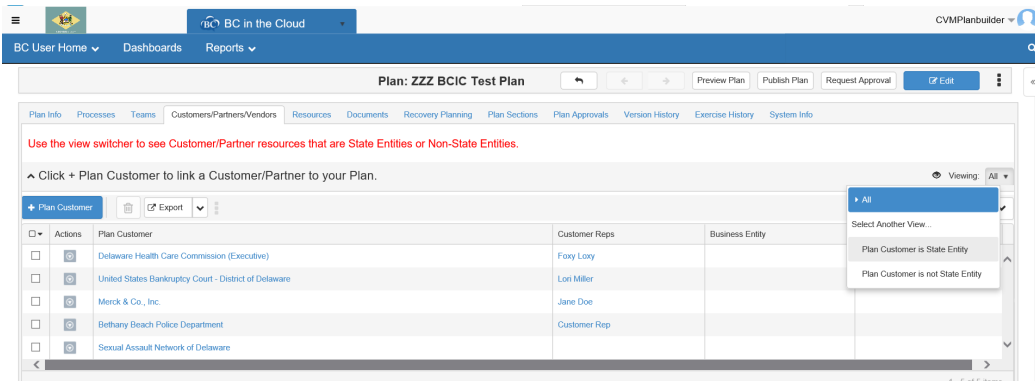
Business Entity

State Employee

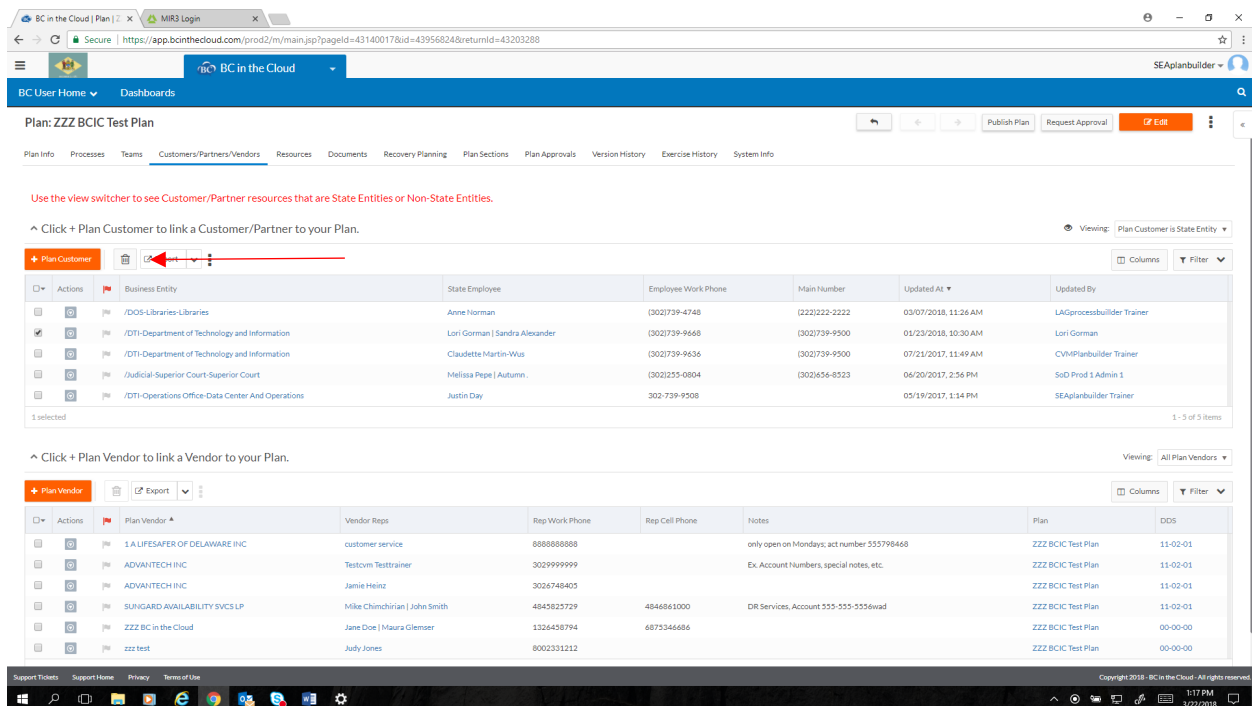
Main Number
 Format: (999)999-9999

Removing a Customer/Partner from your Plan

Step 1. Find the Customer/Partner that is or is not a State Entity by changing the view



Step 2. Put a check box next to the record that you want to remove and click the trash can at the top of the view.



Or remove the Customer/Partner by clicking the action button next to the Customer/Partner and clicking delete.

Plan: ZZZ BCIC Test Plan

Use the view switcher to see Customer/Partner resources that are State Entities or Non-State Entities.

Click + Plan Customer to link a Customer/Partner to your Plan.

| Actions | Business Entity | State Employee | Employee Work Phone | Main Number | Updated At | Updated By |
|---------|--|--------------------------------|---------------------|---------------|----------------------|--------------------------|
| | /DOS-Libraries-Libraries | Anne Norman | (302)739-4748 | (222)222-2222 | 03/07/2018, 11:26 AM | LAProcessbuilder Trainer |
| | /DI-Department of Technology and Information | Lori Gorman Sandra Alexander | (302)739-9668 | (302)739-9500 | 01/23/2018, 10:30 AM | Lori Gorman |
| | /DI-Department of Technology and Information | Claudette Martin-Was | (302)739-9636 | (302)739-9500 | 07/21/2017, 11:49 AM | CVMPlanbuilder Trainer |
| | /Judicial-Superior Court-Superior Court | Melissa Peppé Autumn | (302)255-0804 | (302)656-8323 | 06/20/2017, 2:56 PM | SoD Prod 1 Admin 1 |
| | /DI-Operations Office-Data Center And Operations | Justin Day | 302-739-9508 | | 05/19/2017, 1:14 PM | SEAgplanbuilder Trainer |

Click + Plan Vendor to link a Vendor to your Plan.

| Actions | Plan Vendor | Vendor Reqs | Rep Work Phone | Rep Cell Phone | Notes | Plan | DGS |
|---------|------------------------------|-------------------------------|----------------|----------------|--|--------------------|----------|
| | 1 ALIFESAFER OF DELAWARE INC | customer service | 8888888888 | | only open on Mondays; act number 555798468 | ZZZ BCIC Test Plan | 11-02-01 |
| | ADVANTECH INC | Testcvm Testtrainer | 3029999999 | | Ex. Account Numbers, special notes, etc. | ZZZ BCIC Test Plan | 11-02-01 |
| | ADVANTECH INC | Jamie Heinz | 3028748405 | | | ZZZ BCIC Test Plan | 11-02-01 |
| | SUNGARD AVAILABILITY SVCS LP | Mike Chimchirian John Smith | 4845825729 | 4846861000 | DR Services, Account 555-555-5556wad | ZZZ BCIC Test Plan | 11-02-01 |
| | ZZZ BC in the Cloud | Jane Doe Maura Glemser | 1326458794 | 687346686 | | ZZZ BCIC Test Plan | 00-00-00 |
| | zzz test | Judy Jones | 8002331212 | | | ZZZ BCIC Test Plan | 00-00-00 |

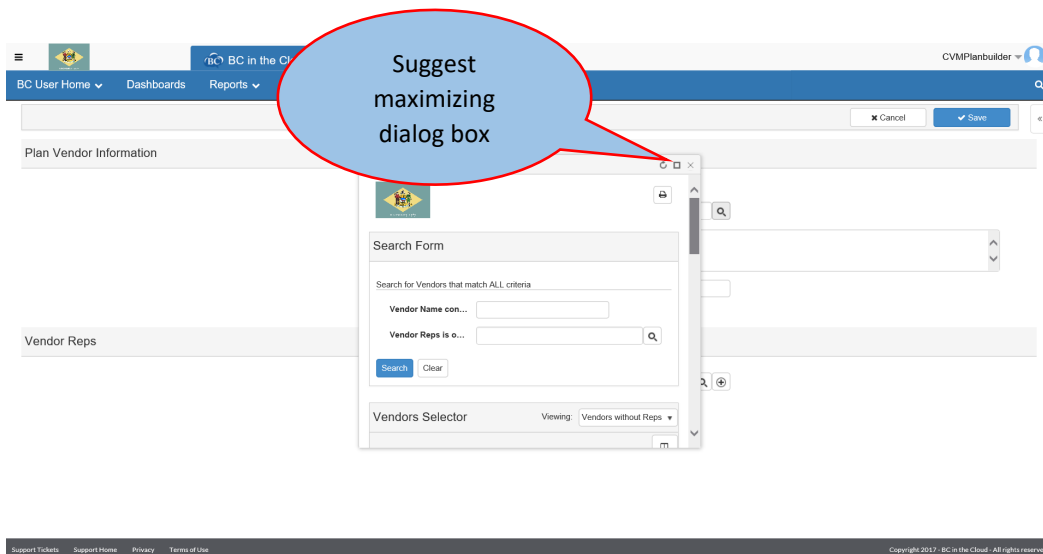
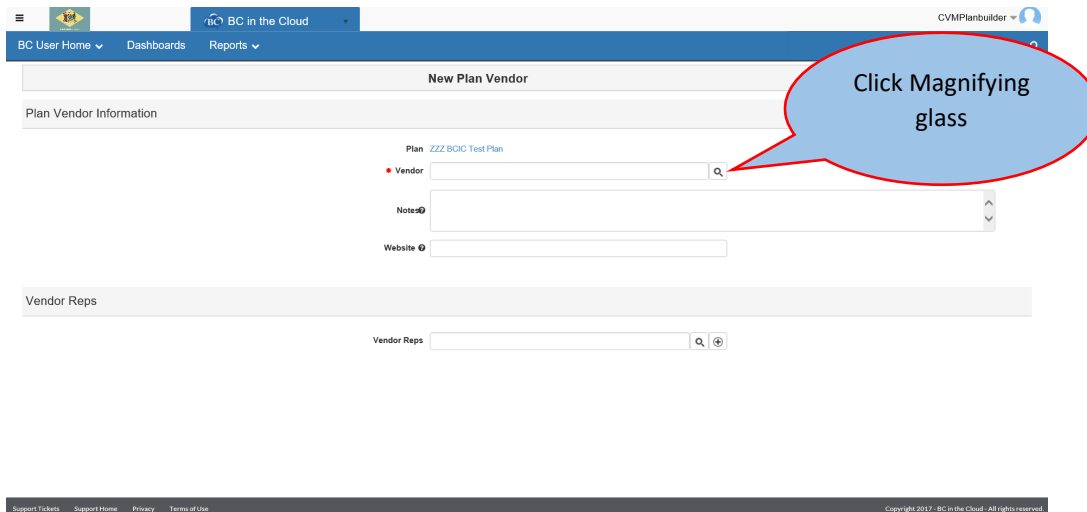
Assign Vendors

Step 1. Click + Plan Vendor button

Click + Plan Vendor to link a Vendor to your Plan.

| Actions | Plan Vendor | Vendor Reqs | Work Phone | Notes | Plan |
|---------|------------------------------|--------------------------|---------------|---------------|--------------------|
| | 1 800 PACK RAT | | (877)751-9378 | | ZZZ BCIC Test Plan |
| | 1 BROOKSIDE DRIVE LLC | | | acct. 4567218 | ZZZ BCIC Test Plan |
| | ADVANTECH INC | Jamie Heinz | (302)874-8405 | | ZZZ BCIC Test Plan |
| | SUNGARD AVAILABILITY SVCS LP | | (484)582-2106 | | ZZZ BCIC Test Plan |
| | ZZZ BC in the Cloud | Jane Doe Maura Glemser | (267)341-9610 | | ZZZ BCIC Test Plan |
| | zzz test | Judy Jones | (789)456-7891 | | ZZZ BCIC Test Plan |

Step 2. Type the vendors name directly into the Vendor field or click the magnifying glass next to Vendor field

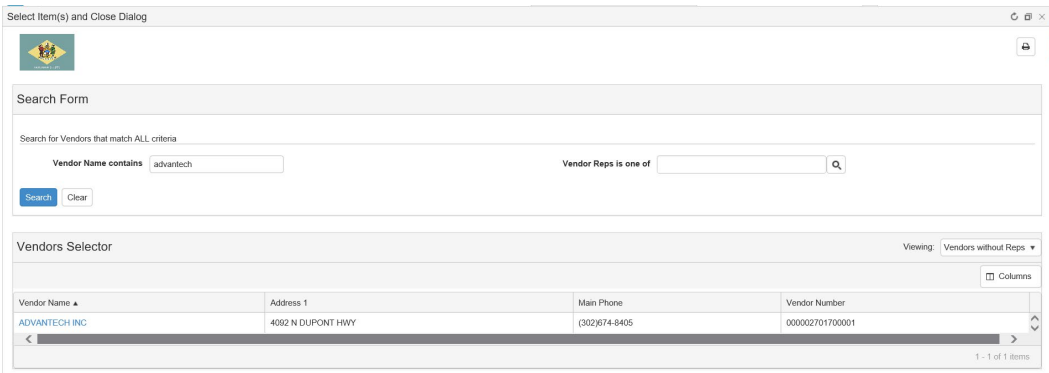


Step 3. Search by vendor name or representative name



- Enter a portion of vendor name or Vendor Reps is part of

Step 4. Click the vendor name to assign to plan

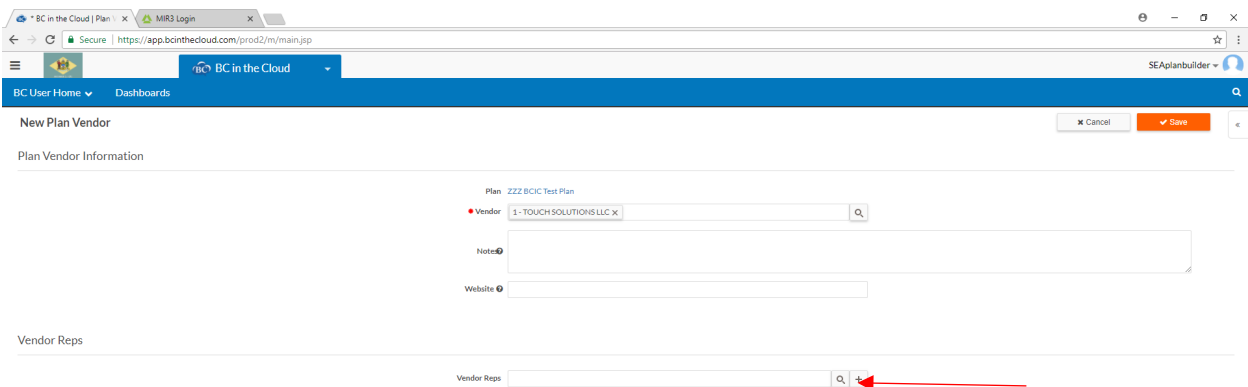


Step 5. Enter any notes as applicable for this vendor

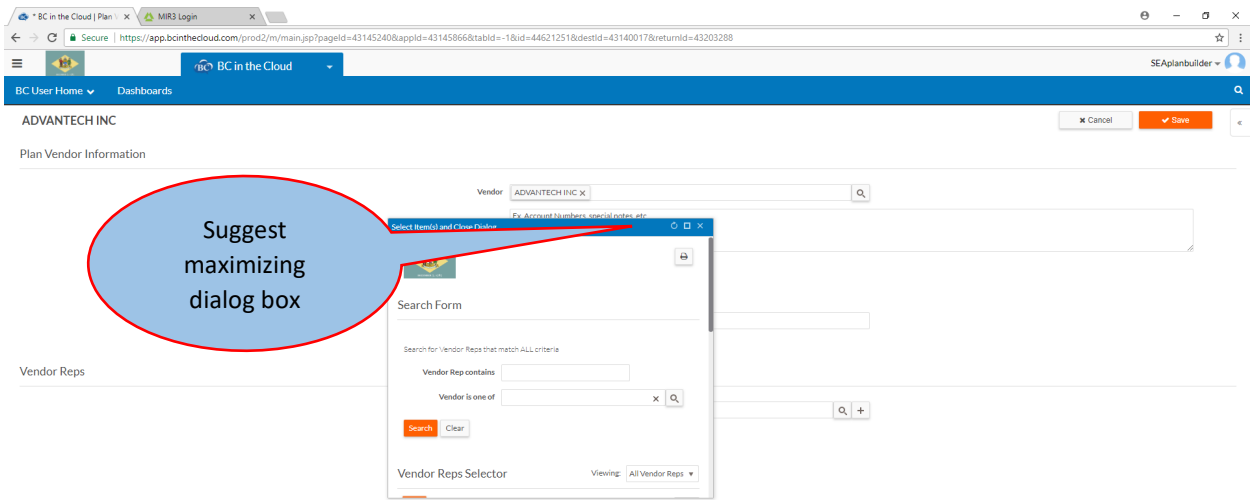
Step 6. Enter the vendor's website, if known.

Add Vendor Rep

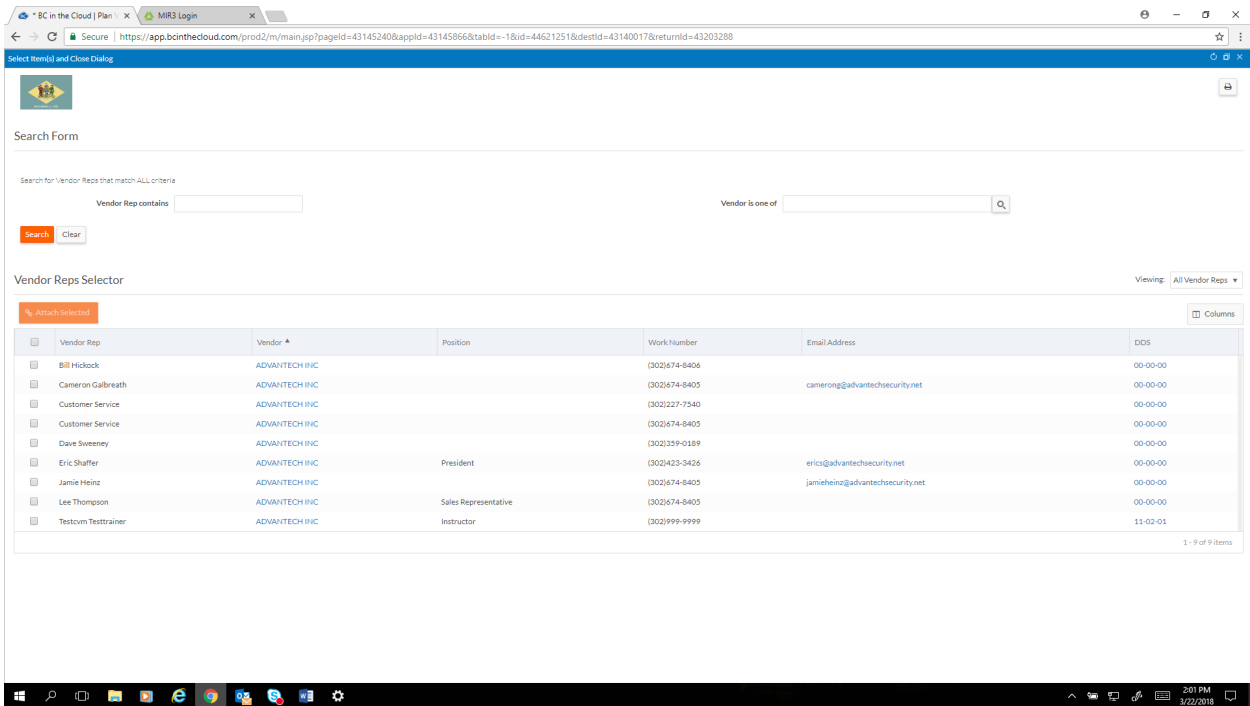
Step 1. Search for the vendor rep by clicking the magnifying glass next to the Vendor Rep field



Step 2. Search for the vendor name in the search box. Click the magnifying glass next to Vendor field



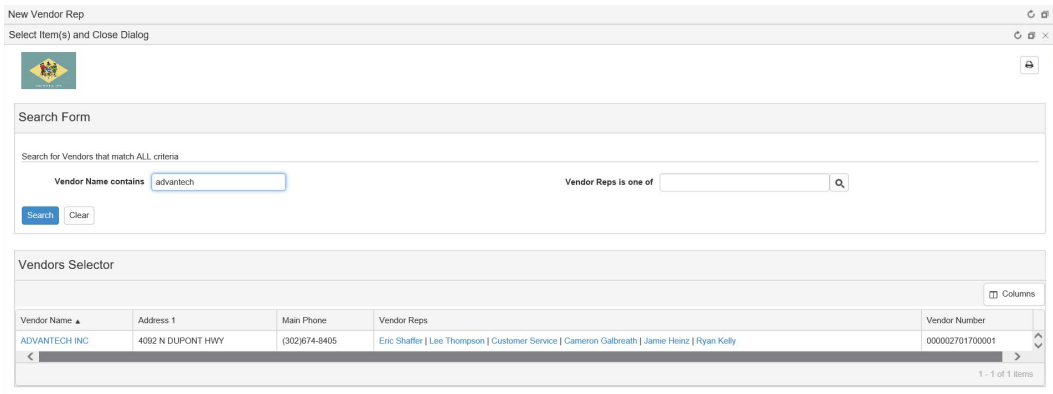
If you do not see the name of the vendor rep that you utilize you will need to close this screen by click the X at the top right.



If you see the correct vendor rep name, click in the box next to their name and click the Attach Selected button.

Step 3. Click the + sign next to the vendor rep field

Type in the Vendor Name in the Vendor Name field or click on the magnifying glass to search for the Vendor Name



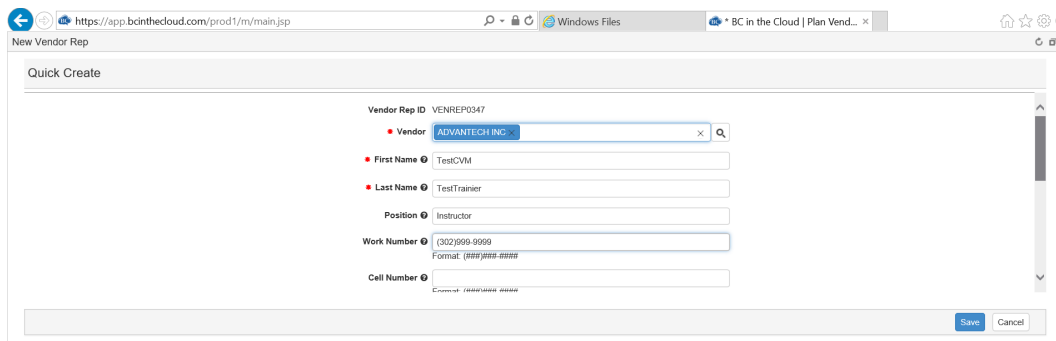
The screenshot shows a 'New Vendor Rep' dialog box with a search form and a vendors selector table. The search form has a 'Vendor Name contains' field with 'advantech' entered and a 'Search' button. The vendors selector table has the following data:

| Vendor Name | Address 1 | Main Phone | Vendor Reps | Vendor Number |
|---------------|-------------------|---------------|---|-----------------|
| ADVANTECH INC | 4092 N DUPONT HWY | (302)674-8405 | Eric Shaffer Lee Thompson Customer Service Cameron Galbreath Jamie Heinz Ryan Kelly | 000002701700001 |

Enter a portion of vendor name and click Search button

Step 4. Click the vendor name to connect to the vendor rep that you are creating

Step 5. Add all information that you have access to but you must add the Reps first name and last name as minimum requirements



The screenshot shows the 'New Vendor Rep' form with the following fields:

- Vendor Rep ID: VENREP0347
- Vendor: ADVANTECH INC.
- First Name: TestCVM
- Last Name: TestTrainer
- Position: Instructor
- Work Number: (302)999-9999
- Cell Number: (302)999-9999

Step 6. Click Save

Remove a vendor from your plan

Step 1. Locate the vendor name that you no longer use.

Step 2. Put a check box next to the record that you want to remove and click the trash can at the top of the view.

BC in the Cloud | Plan | X MR3 Login

Secure | https://app.bcinthecloud.com/prod2/my/main.jsp?pageId=43140017&id=44621251&returnId=43203288

BC User Home | Dashboards

Plan: ZZZ BCIC Test Plan

Click + Plan Customer to link a Customer/Partner to your Plan.

Viewing: Plan Customer is not State Entity

| Actions | Plan Customer | Customer Reps | Plan | Updated At | Updated By |
|---------|---|------------------|--------------------|----------------------|---------------------------|
| | (OS) NCO Financial System | Lisa Anderson | ZZZ BCIC Test Plan | 03/21/2018, 11:04 AM | SEApianbuilder Trainer |
| | Delaware Technical & Community College | Customer Service | ZZZ BCIC Test Plan | 03/07/2018, 11:25 AM | LAGprocessbuilder Trainer |
| | University of Delaware | Customer Service | ZZZ BCIC Test Plan | 03/07/2018, 11:23 AM | LAGprocessbuilder Trainer |
| | Bethany Beach Police Department | Customer Rep | ZZZ BCIC Test Plan | 01/22/2018, 2:03 PM | SoD Prod 1 Admin 1 |
| | Delaware Health Care Commission (Executive) | Foxy Loxy | ZZZ BCIC Test Plan | 06/14/2017, 10:40 AM | LAGprocessbuilder Trainer |
| | United States Bankruptcy Court - District of Delaware | Lori Miller | ZZZ BCIC Test Plan | 06/12/2017, 10:08 AM | LAGpianbuilder Trainer |
| | Merck & Co., Inc. | Jane Doe | ZZZ BCIC Test Plan | 06/12/2017, 10:07 AM | LAGpianbuilder Trainer |
| | Sexual Assault Network of Delaware | | ZZZ BCIC Test Plan | 05/19/2017, 1:26 PM | SEApianbuilder Trainer |

1 - 8 of 8 items

Click + Plan Vendor to link a Vendor to your Plan.

Viewing: All Plan Vendors

| Actions | Plan Vendor | Vendor Reps | Rep Work Phone | Rep Cell Phone | Notes | Plan | DDS |
|---------|-------------------------------|-------------------------------|----------------|----------------|--|--------------------|----------|
| | 1 A LIFESAVER OF DELAWARE INC | customer service | 8888888888 | | only open on Mondays; act number 555798468 | ZZZ BCIC Test Plan | 11-02-01 |
| | ADVANTECH INC | Testcvm Testtrainer | 3029999999 | | Ex Account Numbers, special notes, etc. | ZZZ BCIC Test Plan | 11-02-01 |
| | ADVANTECH INC | Jamie Heinz | 3026748405 | | | ZZZ BCIC Test Plan | 11-02-01 |
| | SUNGUARD AVAILABILITY SVCS LP | Mike Chimchirian John Smith | 4845823729 | 4846861000 | DR Services, Account 555-555-5556wad | ZZZ BCIC Test Plan | 11-02-01 |
| | ZZZ BC in the Cloud | Jane Doe Maura Glemser | 1326458794 | 6875346686 | | ZZZ BCIC Test Plan | 00-00-00 |
| | zzz test | Judy Jones | 8002331212 | | | ZZZ BCIC Test Plan | 00-00-00 |

1 selected

1 - 6 of 6 items

Support Tickets | Support Home | Privacy | Terms of Use

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2:16 PM 3/22/2018

Or remove the Vendor by clicking the action button next to the Vendor name and clicking delete.

BC in the Cloud | Plan | X MR3 Login

Secure | https://app.bcinthecloud.com/prod2/my/main.jsp?pageId=43140017&id=44621251&returnId=43203288

BC User Home | Dashboards

Plan: ZZZ BCIC Test Plan

Click + Plan Customer to link a Customer/Partner to your Plan.

Viewing: Plan Customer is not State Entity

| Actions | Plan Customer | Customer Reps | Plan | Updated At | Updated By |
|---------|---|------------------|--------------------|----------------------|---------------------------|
| | (OS) NCO Financial System | Lisa Anderson | ZZZ BCIC Test Plan | 03/21/2018, 11:04 AM | SEApianbuilder Trainer |
| | Delaware Technical & Community College | Customer Service | ZZZ BCIC Test Plan | 03/07/2018, 11:25 AM | LAGprocessbuilder Trainer |
| | University of Delaware | Customer Service | ZZZ BCIC Test Plan | 03/07/2018, 11:23 AM | LAGprocessbuilder Trainer |
| | Bethany Beach Police Department | Customer Rep | ZZZ BCIC Test Plan | 01/22/2018, 2:03 PM | SoD Prod 1 Admin 1 |
| | Delaware Health Care Commission (Executive) | Foxy Loxy | ZZZ BCIC Test Plan | 06/14/2017, 10:40 AM | LAGprocessbuilder Trainer |
| | United States Bankruptcy Court - District of Delaware | Lori Miller | ZZZ BCIC Test Plan | 06/12/2017, 10:08 AM | LAGpianbuilder Trainer |
| | Merck & Co., Inc. | Jane Doe | ZZZ BCIC Test Plan | 06/12/2017, 10:07 AM | LAGpianbuilder Trainer |
| | Sexual Assault Network of Delaware | | ZZZ BCIC Test Plan | 05/19/2017, 1:26 PM | SEApianbuilder Trainer |

1 - 8 of 8 items

Click + Plan Vendor to link a Vendor to your Plan.

Viewing: All Plan Vendors

| Actions | Plan Vendor | Vendor Reps | Rep Work Phone | Rep Cell Phone | Notes | Plan | DDS |
|---------|-------------------------------|-------------------------------|----------------|----------------|--|--------------------|----------|
| | 1 A LIFESAVER OF DELAWARE INC | customer service | 8888888888 | | only open on Mondays; act number 555798468 | ZZZ BCIC Test Plan | 11-02-01 |
| | ADVANTECH INC | Testcvm Testtrainer | 3029999999 | | Ex Account Numbers, special notes, etc. | ZZZ BCIC Test Plan | 11-02-01 |
| | ADVANTECH INC | Jamie Heinz | 3026748405 | | | ZZZ BCIC Test Plan | 11-02-01 |
| | SUNGUARD AVAILABILITY SVCS LP | Mike Chimchirian John Smith | 4845823729 | 4846861000 | DR Services, Account 555-555-5556wad | ZZZ BCIC Test Plan | 11-02-01 |
| | ZZZ BC in the Cloud | Jane Doe Maura Glemser | 1326458794 | 6875346686 | | ZZZ BCIC Test Plan | 00-00-00 |
| | zzz test | Judy Jones | 8002331212 | | | ZZZ BCIC Test Plan | 00-00-00 |

1 - 6 of 6 items

Support Tickets | Support Home | Privacy | Terms of Use

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2:10 PM 3/22/2018

Edit a Vendors information

Step 1. Locate the Vendor that should be updated and click on the action button next to the vendor name.

The screenshot shows a web application interface for managing a plan. The page title is "Plan: ZZZ BCIC Test Plan". Below the title, there are buttons for "Publish Plan", "Request Approval", and "Edit".

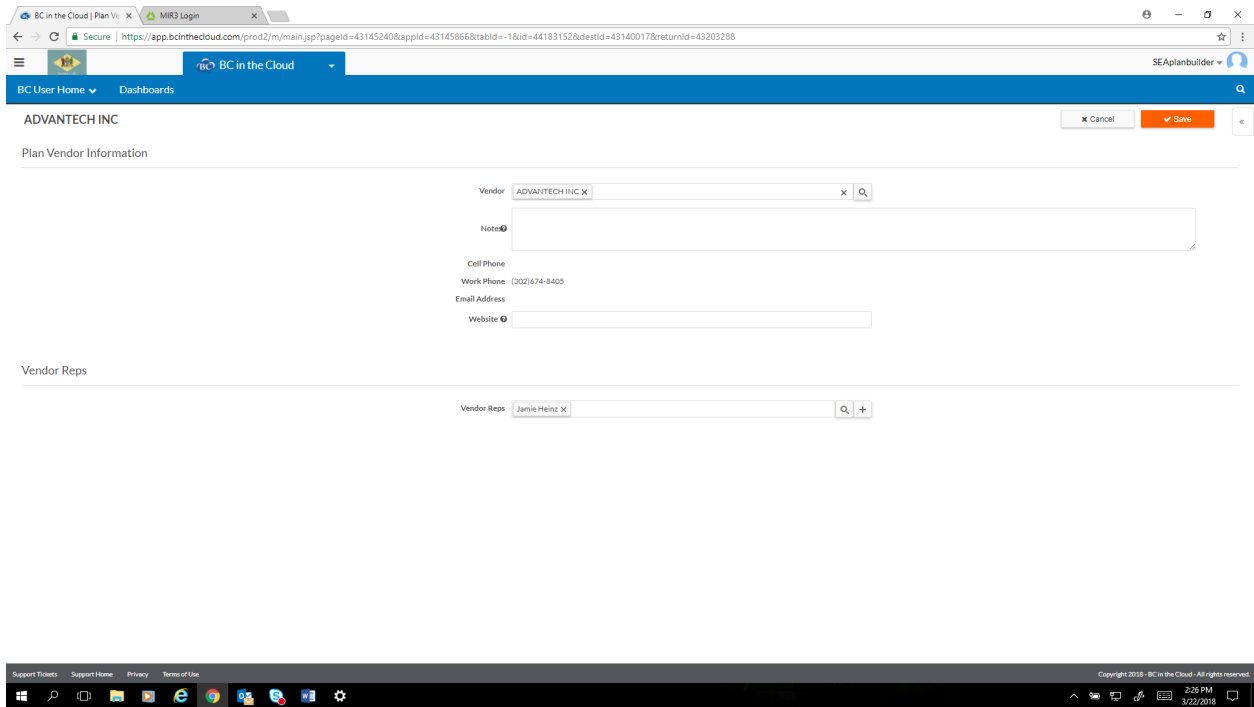
There are two main sections:

- Plan Customer:** A table with columns: Actions, Plan Customer, Customer Reps, Plan, Updated At, and Updated By. It lists 8 customers, including "IOSI NCO Financial System", "Delaware Technical & Community College", and "University of Delaware".
- Plan Vendor:** A table with columns: Actions, Plan Vendor, Vendor Reps, Rep Work Phone, Rep Cell Phone, Notes, Plan, and DDS. It lists 6 vendors, including "1 A LIFESAVER OF DELAWARE INC", "ADVANTECH INC", and "ZZZ BC in the Cloud". The "ZZZ BC in the Cloud" entry has an "Edit" button next to it.

The bottom of the screenshot shows a Windows taskbar with the date and time "2:24 PM 3/22/2018".

Click Edit

Note that there are some fields that come from First State Financials and are not editable and other fields such as Notes and Website that are editable.



Step 2. If the vendor rep name has changed simply click the X next to the vendor rep name and assign/create a new vendor rep by following the Add Vendor Rep steps above.