



Sundt Construction Inc

XBE Utilization Management System

B2G Now

XBE Utilization Management System - Vendor User Manual

XBE Diversity & Compliance / Diversity Department / SKILL. GRIT. PURPOSE. / SUNDT.COM

INTRODUCTION

The XBE Diversity Program with Sundt Construction Inc utilizes B2Gnow software to track and evaluate contract compliance and participation on all construction contracts in accordance with Owners programs and requirements. The software is a hosted service and can be located online at [Sundt XBE Utilization Management System \(diversitycompliance.com\)](https://diversitycompliance.com)

This manual is designed for subcontractors (referred to as Vendors in this manual) and outlines accessing the system, responding to monthly compliance audits and training and support resources.

Finding and Managing Your Account

If you are uncertain if you have a current account/username, log on to the system at [Sundt XBE Utilization Management System \(diversitycompliance.com\)](https://diversitycompliance.com). On the right-hand side of the screen, click on Account Lookup.



On the Account Lookup screen, you can search by several factors including your business name or Tax Identification number; however, all usernames are tied to a specific email address, so it is the best criteria to use. In the Search by Contact Information section, enter your email address, then click on Search at the bottom of the page.

Search by Business Name or DBA

Tip: Try a few letters of the firm's name.

Search by Tax Identification Number

Tip: Must be 9 numbers; do not enter spaces or dashes.

Search by Contact Person

First Name

Tip: Use the first letter.

Last Name

Tip: Try the first few letters.

Search by Contact Information

Email

Tip: Try part of the email.

Phone Number

Fax Number

Search by Location

Address

Based on user's location/address

City

State/Province

Search

If you are not able to locate your email address in the system, search your Business Name or Tax Identification Number. Once located you will want to select the option to "Request New User for This Entity" and fill out the required fields. The request will be sent directly to Sundt to confirm and accept.

Request New User

Close

Use this form to request a new user for your account.

Enter the user account information, your contact information, and any additional relevant details. Click the **Submit** button to send the message to Customer Support. The security of the system is important, and all requests are verified prior to any action being taken. We may need to request additional information to complete the process.

* required entry

Section 1: User Information

COMPANY/ ORGANIZATION NAME *

TAX ID NUMBER * Tax ID Number is used to verify the account.

USER'S NAME *
 First Name Last Name

TITLE *

EMAIL *

PHONE NUMBER * Ext.

FAX NUMBER

NOTIFICATION Notify user of new account

Section 2: Your Message

Once you have confirmed your email address is in the database, sign in using the Log In button.

If you were not given a password or do not remember your password, you can choose Forgot Password to have a one-time password sent to your email.

Logging in for the First Time

The first time you log into the system, you will see a Welcome screen (Figure below). By default, a box is checked to prevent this screen from appearing on future log-ins. The screen provides some basic information on security, navigating the system, finding records and help and support. After reviewing the information, you can click Continue to proceed to your home page (the entry screen for future logins).

The screenshot shows the SUNDT System Dashboard. The header is yellow and contains the text "The System Dashboard". Below the header is a yellow box with the text "Welcome to your new Dashboard!". The text below the welcome message reads: "This tool can be personalized and configured to display exactly the information you want to see, in a simpler & cleaner format." Below this is the text "Take advantage of many powerful features:" followed by a bulleted list of features:

- Control exactly what, where, and how to display data
- Add multiple blocks of information
- Place a block on the left or right of the Dashboard
- Set data based on your own assigned records or the entire organization
- Move blocks up or down on the Dashboard
- Change the color of a block to highlight important information
- New data options are added monthly

Below the list is the text "Click [Personalize](#) to get started." On the left side of the dashboard is a navigation menu with the following items:

- Home
- View »
- Search »
- Reporting »
- Create »
- Tools »
- Settings »
- Help & Support »
- Logoff

At the bottom of the menu are two links: "Show All" and "Hide All".

The home page is the default entry screen for all subsequent logins. It includes six distinct areas: the Dashboard, Certification Center, Key Actions, Alert, System News and Configure.

The dashboard is the most important section of the home page, as it gives a quick view of your current contracts and any actions needed. This section also lists Contract Audits. Contract Audits are the most essential function of this system for reporting purposes and are discussed in more detail below. NOTE: Once you click [Personalize](#) you can customize to display only records assigned to "only you".

The System Dashboard

SUNDT

Home
View »
Search »
Reporting »
Create »
Tools »
Settings »
Help & Support »
Logoff

Show All Hide All

Contracts

Total active 1
Audited 1
Soon to end (3 mo) 1

Displaying User Data - [Config](#)

Contracts	#	Value	Payments For Credit	% Goal % Credit
All (open & closed)	1	\$37MM	\$0	3.0%
All Open	1	\$37MM	\$0	3.0%
All Audited	1	\$37MM	\$0	3.0%

Displaying User Data - [Config](#)

Contract Audits

Total < 90 days > 90 days

Displaying User Data - [Config](#)

Favorite Reports

No favorite reports designated. [Select your favorite reports.](#)

[Config](#)

SETTING UP TIERED SUBS + VENDORS

After logging in to the system, navigate to the toolbar and select *View* and then *My Contracts*. Select the applicable contract in which you have been awarded.

Next, click on the *Subcontractors* tab on the top of the screen.

Contract Management: Subcontractor List

Contract Main View Contract **Subcontractors** Compliance Audit List Compliance Audit Summary Messages Comments Reports

Sundt Construction Inc
132107: SDCRAA-Administration Building
Prime: Sundt Construction, Inc.

Your company name should populate on the subcontractor list. To assign a tier to your contract, click the hyperlink to *Add Tier 2 Sub*

Subcontractor List

Subcontractor Name	Certified	Current Award	Type	Inc. in Goal	Compliance Audit	Final Pennt	Actions
1 Sundt Construction, Inc.	✓	\$78,096	Sub	No	✓	No	Add Tier 2 Sub

Find your applicable trade partner using the Get Vendor hyperlink and searching by the company name or other relevant data points. If your search does not identify your trade partner, you will choose the option to *Add New Vendor*

* required entry

Vendor Information	
VENDOR *	Get Vendor from vendor database

Once you have selected the correct trade partner, you will enter the *Vendor Compliance Contact* and *Vendor Address* information. Note that the vendor compliance contact chosen will be the individual at the company who will be required to confirm payments made to them in the system. You can select more than one contact to get notifications. Further, the address chosen should be the local address who is performing work or supplying materials.

* required entry

Vendor Information	
VENDOR *	AMERICAN VETERAN SUPPLY COMPANY (Change Vendor)
VENDOR COMPLIANCE CONTACT *	Primary compliance contact (required): <input type="text" value="Beni Monaco"/>
	Secondary compliance contact (optional): <input type="text" value="None selected"/>
	<small>This contact will receive copies of all compliance notices.</small>
VENDOR ADDRESS *	<input type="text" value="5881 OBISPO AVENUE SUITE 106, LONG BEACH, CA 90805"/>

Note any applicable XBE certifications for your trade partner. If you notice that the company has certifications that are missing from the platform, please reach out to your primary contact at Sundt with the missing information.

Applicable Vendor Certifications	
Type	Organization
SBE	California Department of General Services

Next, fill out all required (*) information under the *Subcontract Information* header. Ensure responses align with the below instructions.

- Mark **YES** to include in compliance audits for any companies whose work is not fully complete and paid as of the date you are adding them to the system.

INCLUDE IN COMPLIANCE AUDITS? *

Yes - subcontractor is active and should be included in the periodic compliance audits of the contract.
 No - subcontractor is inactive.

- For any company who holds a certification applicable to the contract, mark **YES** to include in goal and select the appropriate goal from the drop-down list.

COUNT TOWARDS CERTIFIED GOAL *

Yes - Payments to this subcontractor count towards the Goal
 No

- Click **NO** subcontractors first audit will be the next one and enter payments made to date to the company.

ADD VENDOR TO EXISTING AUDITS FOR THIS CONTRACT? *

Yes - add this subcontractor to all audits going back to the period of
 No. Subcontractor's first audit will be the next one.
 Payments Already Made: \$

- In the required comments section please enter "Adding tiered subcontractor/vendor"

Finally, review and submit your information. Once approved, you will be able to add third tier subs, or instruct your second-tier subs to add their third tier subs in compliance with this document.

Compliance Audits

Compliance audits are the key function of the B2Gnow system for compliance monitoring. On the first of each month, a new “audit” is created for the previous month. An audit is simply the form used by you, the vendor, to report payments received from a “specific project” and payments made to your subcontractors.

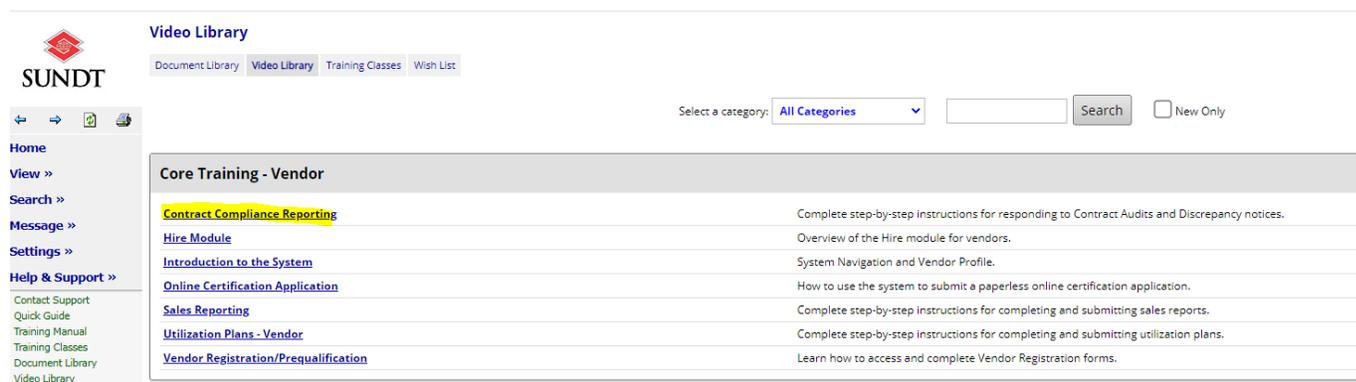
Upon creation of a new audit, you will receive an email notifying you that the audit has been opened and the due date for reporting the required information. Key information is included at the top of the email including the Contract Name, Prime Contractor, Contract Number and reporting period. There is also a link provided. Clicking on the link will take you to the login screen. Once you have logged into the system, you will be taken directly to the audit in question.

You may also open any contract audits from your system dashboard (as shown above).

The audit screen contains a variety of key information. This includes the contract number and name, the reporting time period, the actions that you need to take, and key dates (the date the information is due and the date the audit will be locked). NOTE: if an audit locks prior to your entering the required data, you will need to contact the assigned Compliance Officer to have it re-opened. If you know in advance that you will not have the information available, you may request an extension from the Compliance Officer.

There are two required actions: confirm payment(s) received from Sundt, and report payments made to your vendors.

A complete training on responding to compliance audits can be found by clicking Help & Support from the system home page <https://sundt.diversitycompliance.com> and then selecting Video Library. In the Video Library, locate the Contract Compliance Reporting training.



The screenshot shows the SUNDT Video Library interface. The top navigation bar includes 'Document Library', 'Video Library', 'Training Classes', and 'Wish List'. A search bar is present with a dropdown menu set to 'All Categories' and a 'Search' button. A 'New Only' checkbox is also visible. The main content area is titled 'Core Training - Vendor' and lists several training videos:

Video Title	Description
Contract Compliance Reporting	Complete step-by-step instructions for responding to Contract Audits and Discrepancy notices.
Hire Module	Overview of the Hire module for vendors.
Introduction to the System	System Navigation and Vendor Profile.
Online Certification Application	How to use the system to submit a paperless online certification application.
Sales Reporting	Complete step-by-step instructions for completing and submitting sales reports.
Utilization Plans - Vendor	Complete step-by-step instructions for completing and submitting utilization plans.
Vendor Registration/Prequalification	Learn how to access and complete Vendor Registration forms.

On the left side of the interface, there is a sidebar with the SUNDT logo and a navigation menu including: Home, View », Search », Message », Settings », Help & Support », Contact Support, Quick Guide, Training Manual, Training Classes, Document Library, and Video Library.

If you prefer to attend a live training session, choose Training Classes under Help and Support, and register for one of the weekly Contract Compliance Reporting – Vendor Trainings.



Transactions: Events & Training Classes

Events may be available to attend. Click the links in the Action column to view information and details of a particular event. You can adjust the filters and date range to

To resort click column title. To filter click drop down menu.

Actions	Status	RSVP	Event
	All ▾	All ▾	All ▾
RSVP	Closed		Contract Compliance Reporting - Vendor Training
RSVP	Open, 42 space(s) left		Online Certification Application - Vendor Training
RSVP	Open, 96 space(s) left		Introduction to the System - Vendor training
RSVP	Open, 145 space(s) left		Contract Compliance Reporting - Vendor Training

Home

View »

Search »

Message »

Settings »

Help & Support »

Contact Support

Training & Support

This manual covers the primary areas needed for reporting as required by Sundt. The system does have many other features and we encourage you to explore them. You can receive additional training guides and videos from B2Gnow under Help & Support on our system home page <https://sundt.diversitycompliance.com>. In addition, you can send questions directly to Sundt within the system by navigating to Message and choosing the option to Send a Message or Contact Support.

Please be advised that reporting payments in the system is not a guaranteed condition to obtain progress payments. Make sure any additional contractual obligations are fulfilled.