

# Bidder Registration Instructions

For Prospective County Suppliers

January 2015



COUNTY OF  
**SONOMA**

# Who is a Bidder?

- A prospective supplier to the County of Sonoma
- Has not previously received payment from the County for goods and/or services

**Bidders must register in the  
Supplier Portal in order to receive  
bid notifications and place bids.**

**[Click here to go to the Supplier Portal](#)**

**Registration instructions continue on the following pages.**

## Supplier Portal Login Screen

This image may differ slightly from the actual screen, as it was taken while still in testing.

Bidders should have their Taxpayer Identification Number or Social Security Number on hand when beginning the registration process.

Click on the “Register as a Bidder” link.

County of Sonoma  
EFS

Welcome to Sonoma County [FNST]


Favorites Main Menu


### Login


Login here as an existing User.

User ID:

Password:

 [Register as a Bidder](#)  
Click here to register as a bidder and to be able to bid on events.

 [Register as a Vendor](#)  
Click here to register as a vendor user and to be able to see purchasing details

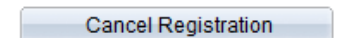
 [I forgot my password, but have my User ID](#)  
Click here to reset your password

## **IMPORTANT:**

### **Navigation Information**

Please do not use the BACK button on your browser when navigating through the Supplier Portal. If you are in the middle of a transaction and use the BACK button on your browser, the transaction will not process and you will be returned to the login page.

Use the provided navigation buttons.



## Step 1 of 8: Preliminary Information

Specify the type of business and bidding activities you are interested in.

### Bidder Registration

#### Step 1 of 8: Preliminary information.

These questions will determine the type of bidder you will become.

\* Required Field

1. Please select the type of bidder which best describes you.

- Business
- Individual

2. What type of bidding activities are you interested in?

- Buying goods/Services
- Selling goods/Services
- Both

Next >>

Cancel Registration

\* Required Field

## Bidder Registration


### Step 2 of 8: User Account Setup

Begin creating your user account here. Note that you may register other users for your company in addition to yourself. To create additional accounts for other users, click "Save and Add Another User" to expand the form. You may also provide instant messaging account information (for real-time communication with others using the system), as well as preferred time zone and currency.

\* Required Field



\*Company Name:   
URLID:

#### User Information

\*First Name:   [Delete](#)  
\*Last Name:   
Title:   
\*Email ID:   
\*Telephone:  Ext:   
Fax:   
\*User ID:  (User's account login name.)

#### Other Contact Info (Optional)

Instant Messaging (IM) Information  
IM Service:   
IM User Name:

Personalization Information  
Language:   
Time Zone:   Pacific Time (US)  
Currency Code:  

\* Required Field

## Step 2 of 8: User Account Setup

Required fields are marked with an asterisk.

Please also complete optional fields for language, time zone, and currency code.

Additional users can be added here using the "Save and Add Another User" button.

Click "Next."

## Step 3 of 8: Primary Address

If your company has multiple locations, the company's main headquarters address should be entered here.

Required fields are marked with an asterisk.

Click "Next."


## Bidder Registration

### Step 3 of 8: Primary Address

Please provide a Primary Address for your company. If your company has multiple site locations, the Primary Address would be the main headquarters.

\* Required Field

#### Primary Address

Country:	<input type="text" value="USA"/>  United States		
*Address 1:	<input type="text" value="424 D Street"/>		
Address 2:	<input type="text"/>		
Address 3:	<input type="text"/>		
Address 4:	<input type="text"/>		
*City:	<input type="text" value="Petaluma"/>		
County:	<input type="text"/>	Zip Code:	<input type="text" value="94952"/>
*State:	<input type="text" value="CA"/> 		

<< Back

Next >>

Cancel Registration

\* Required Field



## Step 4 of 8: Other Account Addresses

If your company has just one address and no changes are needed, click “Next”.

Note the options displayed here depend on the selections made in Step 1. If you selected anything other than “Selling Goods and Services” in Step 1, different address options will appear here.

If needed, you may use the “Back” button to return to Step 1 and make corrections. You may add other account addresses that are different from the primary address in the next step.

Click “Next.”

### Bidder Registration

#### Step 4 of 8: Other Account Addresses

\* Required Field

The Primary Address you have entered for Sonoma South is:  
**424 D Street**  
**Petaluma, California 94952, United States**

If you need to make corrections, click the Back button and edit your fields.

**Other Account Addresses**

Because you will be bidding on events as a seller of goods/services, you must provide an Invoice address.

Check boxes below to indicate addresses that are different from your Primary Address:

**Invoice Address** your company's accounts receivable department (for when you sell goods/services).

<< Back

Next >>

Cancel Registration

\* Required Field

## Step 5 of 8: Address Contacts

If your company has more than one address, additional addresses should be entered here.

Each registered user created in Step 2 should be linked to an address.

Click "Next."

### Bidder Registration

#### Step 5 of 8: Address Contacts

Please enter additional addresses as necessary. (This is required only if your Primary Address is not used for all address types.) Next, please designate each of your registered users to an appropriate address category. If you're not sure which address category is the best match, choose "Primary Address".

\* Required Field

Company Contacts	
User Name	Designate as Contact for
Abigail Martinez	Primary Address

<< Back    Next >>    Cancel Registration

\* Required Field

# Step 6 of 8: Additional Classification Information

You must enter a valid Taxpayer Identification Number or Social Security Number.

You must also answer Question \*1.

Completion of the optional “More About Your Organization” section is encouraged, as it aids the County in statistical collection.

Click “Next.”

## Bidder Registration

### Step 6 of 8: Additional Classification Information

Please fill out the following information. This information allows us to more accurately tailor the Sourcing process with your business.

\* Required Field

Standard ID Numbers		Personalize	First
Identification Type	ID Number		
1 Tax Identification Number	915626999		
2 W2 Identification Number			

SIC Codes - US-NIGP Codes		Personalize	Find	First	1 of 1	Last
Standard Industry Code	Description					
						Delete

Add Row

\*1. Can you answer yes to BOTH of the following questions? 1) If your business is located in a city within Sonoma County, do you have a valid business license if required by the city? 2) Does your business have a valid physical address located within Sonoma County from which business is performed on a day-to-day basis?

Yes

VAT Information				Personalize	First
Country	Description	VAT ID	Home Country		
1			<input type="checkbox"/>		Delete

Add Row

#### More About Your Organization (Optional)

HUBZone Program:

Sm Disadvantaged Business Prog:

Size of Small Business:

Other Preference Programs:

Veteran-Owned Small Business:

Veteran

Disabled

Women-Owned Business

Emerging Small Business

<< Back

Next >>

Cancel Registration

## Step 7 of 8: Categorization Information

Click the file folder icon next to “Sell Categories”. The screen will expand.

Click the check box next to the five digit “parent” category (or categories) ending in -00 that you wish to bid on.

Subcategories can be viewed by clicking the file folder next to the parent category. You may register for subcategories rather than a parent category, but selecting the parent category may result in more solicitation notifications.

These steps are critical, as bid notifications are emailed to Bidders based upon the categories they select.

Bidders must select a category (or categories) in order to receive emailed bid notifications.

Click “Save.”

### Bidder Registration

#### Step 7 of 8: Categorization Information


You have the option to select one or more categories that best describe your organization's bidding interests. Selecting specific categories may qualify you to receive notifications for future events that match your interests. There is no obligation to check any boxes, but doing so could result in more invitations to bid on events. By selecting no categories, you remain eligible to participate in all public events posted on this website.


**\* Required Field**

For best performance, please pause briefly after checking each selection box.

[Check all](#) [Uncheck all](#)

#### Strategic Sourcing Tree

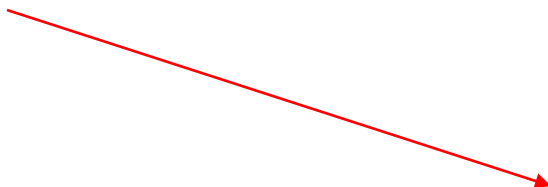
 Sourcing - Sourcing Categories

 Sell Categories

-  005-00 - Abrasives
-  010-00 - Acoustical Tile, Insulating Ma
-  015-00 - Addressing, Copying, Mimeograp
-  019-00 - Agricultural Crops And Grains
-  020-00 - Agricultural Equipment, Implem
-  022-00 - Agricultural Implement And Acc
-  025-00 - Air Compressors And Accessorie
-  031-00 - Air Conditioning, Heating, And
-  035-00 - Aircraft And Airport Equipment

## Step 8 of 8: Terms and Conditions

After reading, click the check box and  
“Finish”.



### Bidder Registration

#### Step 8 of 8: Terms and Conditions

Make sure you read the terms and conditions fully before continuing.

\* Required Field

agree to be bound by the following Terms and Conditions:

1. Disclaimer:

<b>

While Sonoma County intends to maintain continuous access to this web site, from time to time access to information and/or documents may be interrupted or prevented either because of site problems, user problems or Internet problems. Not all access difficulties can be resolved by the County since some access failures may be due to the type of computer or communication equipment and services employed by the web site user. If access to solicitations on the web site has been severely curtailed, the County, at its discretion, may extend the due date of affected solicitations. It is the vendors responsibility to check the website from time to time for updates to opportunities and to pick up additional addenda and information.

<< Back

Finish

Cancel Registration

# Confirmation

You will receive two confirmations.

- 1) After pressing “Finish” in the last step, an onscreen confirmation will display.



- 2) You will also receive an email with your UserID and Password. Please save this email for future reference.



Registration is now complete. You can login to the Supplier Portal to review bidding opportunities and place bids.

## Bidder Registration

Bidder registration for Sonoma South was successful.

Choose the desired user from the grid below and sign in to Strategic Sourcing.

Personalize   Find   [grid icon]   First 1 of 1 Last	
1 Abigail Martinez	<input type="button" value="Sign In"/>

## Bidder Registration Approved

Your application to become a sourcing bidder has been approved. Use the login information in this message to access the system at the URL provided below.

<b>User ID and Password</b>
User ID: acmartinez Password: [REDACTED]
<b>URL</b>
<a href="#">Login to strategic sourcing application.</a>

# Technical issues with registration?

Contact the County department you normally work with for assistance, or send an email describing the issue in detail to [efs-vendor-desk@sonoma-county.org](mailto:efs-vendor-desk@sonoma-county.org)