SUPPLIER ACCOUNT MANAGEMENT INSTRUCTIONS
County of Sonoma Supplier Portal

County of Sonoma Suppliers are responsible for self-managing and updating their account information online. Regularly check and update your account to ensure uninterrupted access to information regarding the County of Sonoma's solicitations. This instructional document provides instructions on accessing and updating your Supplier Account. You can navigate to a particular topic by selecting the topic from the table of contents.

Contents

Signing in to the Supplier Portal

Navigate to the Sonoma County Supplier Portal and sign in using your User ID and password. If you do not remember your User ID, email our Supplier Desk for assistance. If you have your User ID but forgot your password, please click "**Forgot Password**?" to reset.

Navigating the Supplier Portal to Complete/Update User Profile

In order to complete your User Profile configurations, select the tile that states **Maintain User Account**.

Selecting or Updating Categories

The County will email solicitation notifications to Suppliers who have registered for the same commodity or service category as the solicitation. **In order to receive emailed solicitation notifications, you must select one or more categories, and the email address you supplied must be correct**.

In the left navigation pane, select **Maintain User Account**, which will expand the folder. Then select **My Categorizations**.

Click directly on the **file folder icon** 🗀 next to **Sell Categories**.

Search for the c0ategory list for goods and/or services your organization provides. Scroll, or use the Control+F command to search by keyword. When you have identified a category, click on the **file folder icon** next to the **category name** to view the subcategories. Check as many categories and/or subcategories as necessary.

Sonoma County Sourcing Categories

Sourcing - Sourcing Categories
  Sell Categories
      ☐ ⊞ 005-00 - Abrasives
      ☐ 📂 010-00 - Acoustical Tile
          ☐ 010-05 - Acoustical Tile Recycled
          ☑ 010-08 - Acoustical Tile Acc
          ☐ 010-45 - Exterior Insulation/Finish Sys
          ☐ 010-53 - Fiberglass Batts/Blanke/Rolls
          ☐ 010-56 - Foam Glass Blocks, Sheets
          ☐ 010-57 - Foam-in-Place Insul Phen Ureth
          ☑ 010-59 - Foam Plastic Block Board Sheet
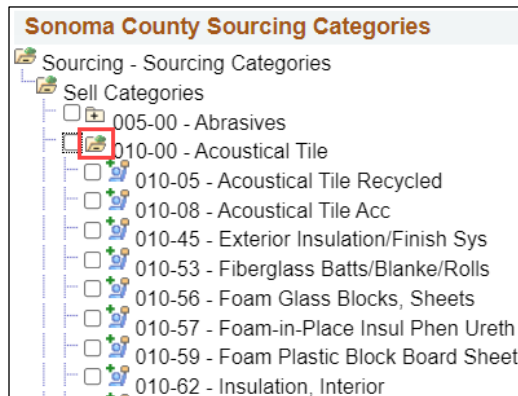
To select all subcategories, first expand the file folder for the category, and then select the checkbox next to the category. All subcategories will be checked.

Sonoma County Sourcing Categories

Sourcing - Sourcing Categories
  Sell Categories
      ☐ ⊞ 005-00 - Abrasives
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          ☐ 010-62 - Insulation, Interior

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          ☑ 010-59 - Foam Plastic Block Board Sheet
          ☑ 010-62 - Insulation, Interior

When finished, scroll to the bottom and click Save. Please note that it may take several minutes to save your progress if many categories are selected.

Save

Editing or Adding Contacts

Contacts are designated employees of your organization that the County can confer with on business issues. On the left panel menu, select **Maintain User Account** and then select **Contacts**. You can edit or add new contacts in this section.
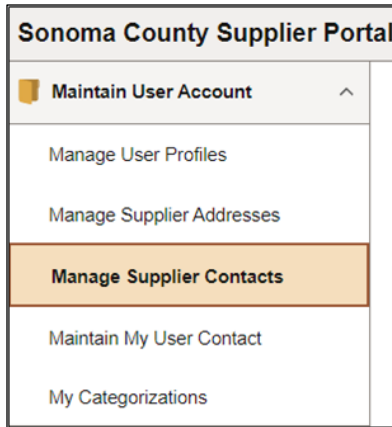
To Edit an existing contact, select the **Edit** button adjacent to the contact you wish to change and/or make sure all the information is correct. To Delete an existing contact, select the **Delete** button.
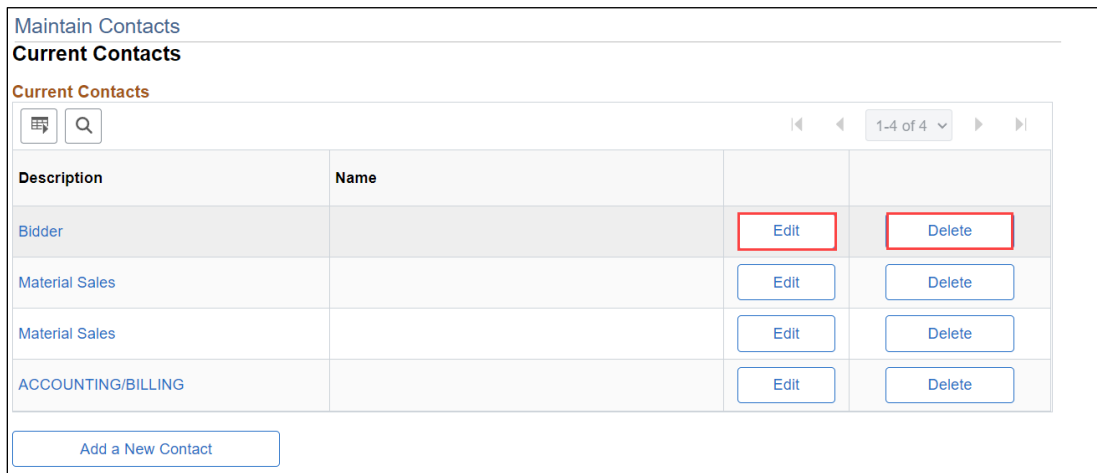
Click **Add a New Contact** to add additional Contacts to your account.

Adding or editing contacts will bring up the Contact Information screen where the information can be entered.

Complete all fields, entering the contact's job title in the **Description** field. If this field is already filled in, please overwrite it. Click **Save** when finished.


You will receive an onscreen confirmation when a contact is successfully saved. To add or update more contacts, select **OK** and repeat the process.
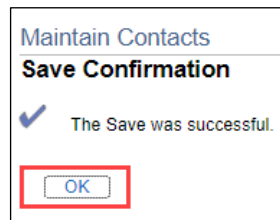

Adding New Users from Your Company

Users are people in your company who can login to and use the account. You can select specific permissions for each User, or give everyone the same permissions. In the left navigation pane select **Maintain User Account** then select **Manage User Profiles**.

Source: Supplier Account Management Instructions
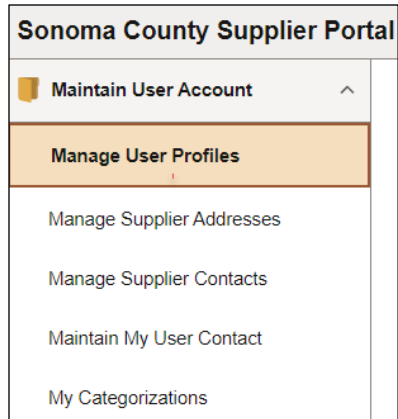
Click the **Add a New Value** button, enter a User ID (login name) for the new User and click **Add**.
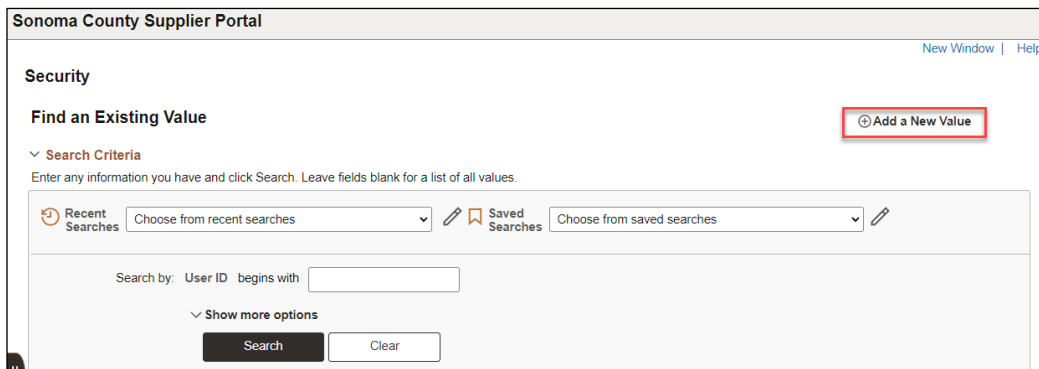
Enter User information in the Setup User screen:

Description - Enter User's job title.

Operator Password - Must be at least 8 characters. The following special characters may be used: ! @ # $ % ^ & *

( ) - = + \ [ ] { } ; : / . < >

Confirm Password - Retype password.

Email Address - Enter email address of new User.

User Role - By default, all new users will be given a role of Event Vendor. This role allows bidding on solicitations, and is required for use of the supplier portal. Additional roles can be added by selecting **Add a User Role**.
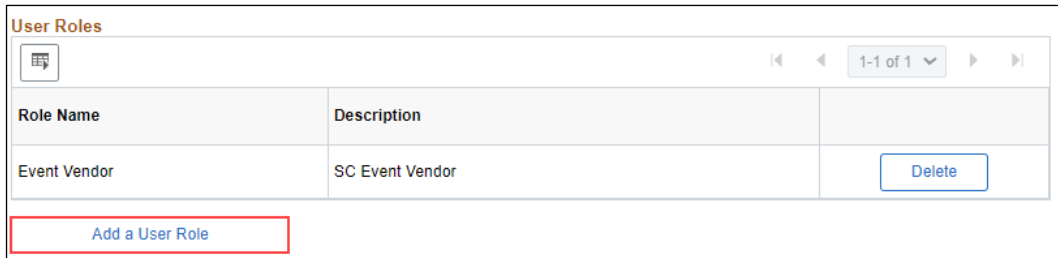
Select one or more roles by checking the box next to the role – role descriptions and permissions are as follows – select **OK** when finished:

- SC_eSupplier/Addresses/Contacts – User can add Contacts to the account.
- SC_eSupplierAdmin – User can create, update, and assign roles to other users.
- SC_eSupplierUserManageOrders – User can review Purchase Orders, Order Summaries, and Receipts.
- SC_eSupplierUserReviewPayments – User can review invoices, payments, and account balances.
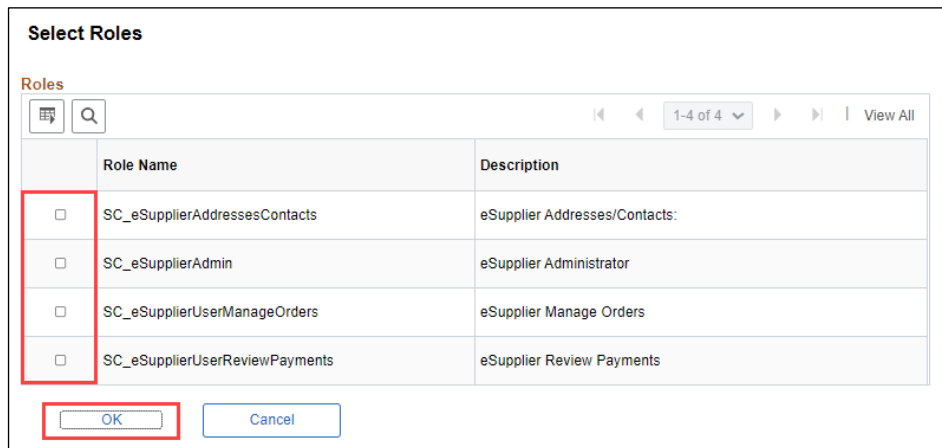
Click **Add a Supplier**.

Click the check box next to Supplier Name, then click **OK**.

Source: Supplier Account Management Instructions

Click **Save** to finish adding this User Account.

Locking Out a User

Users can be locked out to make them unable to access accounts, but not removed. To lock out a User, send an email request to our [Supplier Desk](). Include your Supplier ID number, company name, the User ID to be locked out, and your title and contact information.

Alternatively, Supplier account managers can lock out as User by navigating to **Maintain User Account,** and selecting **Manager User Profiles**. The window defaults to Find an Existing Value – select **Search** to see all Users associated with the account.

Select the **User ID** for the profile to be locked.
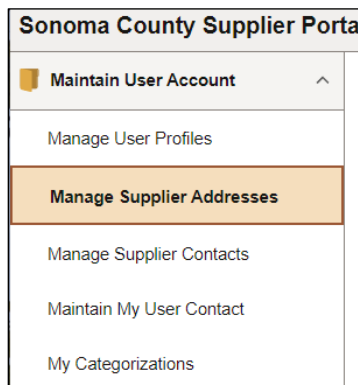
Check the box for "**Account Locked Out?**" to lock the account.

Viewing and Changing Company Addresses

Note: Addresses on the portal are view-only. All address changes must be made by the County. To change your company's address, email your contact at the County with your request and include the following information:

- Supplier ID number
- New Address
- New Telephone Number
- Date change will take effect
- If you have multiple addresses, please specify which should be used for remitting, invoicing, and general mailing.

To view addresses, use the left navigation pane and go to **Maintain User Account** then select **Manage Supplier Addresses**.

Click the link in the description column to see the address information for that entry.

Source: Supplier Account Management Instructions

Viewing Invoices, Payments, and Account Balances

In the left navigation pane, click **POs, Invoices and Payments** to open the folder. From this menu, select Review Purchase Orders, View Supplier Invoices, Review Supplier Payments, or Account Balances and search for desired information.

Source: Supplier Account Management Instructions