



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.

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 "I forgot my password" to reset. Login using your newly created User ID and Password.

Supplier Login

User ID

Password

[Forgot Password ?](#)

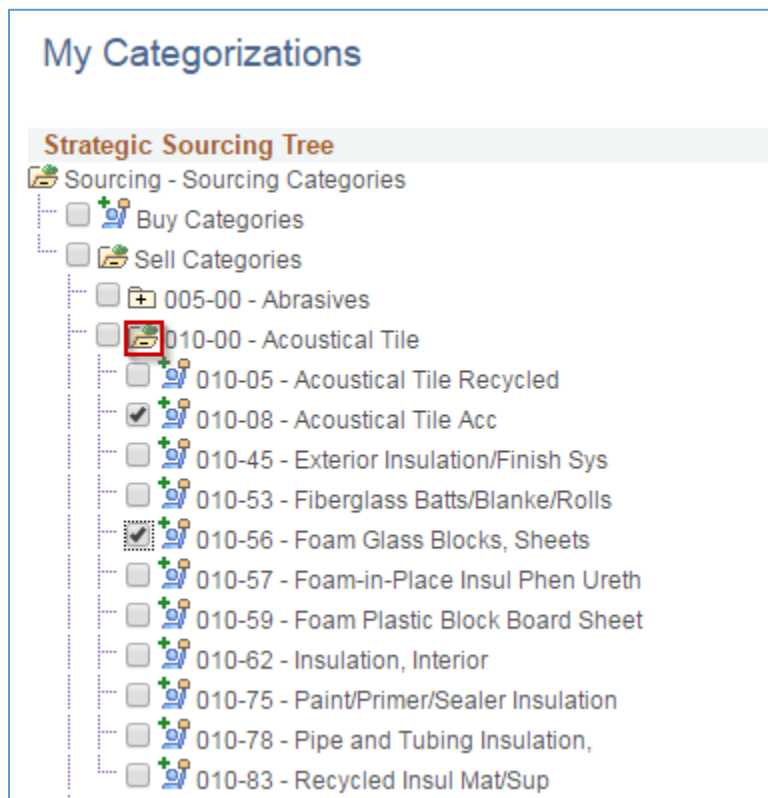
Select Categories

The County emails 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 in this step, even if you selected categories previously.**

Using the grey menu bar, click *Main Menu > Manage Event and Place Bids > My Categorizations*. Click directly on the **file folder** next to **Sell Categories**.



Search for the category 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** next to the **category name** to view the subcategories. Check as many categories and/or subcategories as necessary. **When finished, scroll to the bottom and click Save.**



Add Contacts

Contacts are designated employees that the County can confer with on business issues. Using the grey menu bar, select *Main Menu > Maintain Supplier Information > Contacts*. You can edit or delete existing contacts, and add new contacts. If there is text in the Description or Name fields, select **Edit**. Complete all fields, and enter the new contact's job title in the **Description** field. If this field is already filled in, please overwrite it.

Maintain Contacts

Current Contacts

Organizational Quality Associates Inc

Current Contacts Personalize | Find | [Print] | [Grid] First 1 of 1 Last

Description	Name		
PLEASE ENTER A VALID DESCRIPTION	Sean Tracy	Edit	Delete

Add a New Contact

If there is no text in either the Description or Name fields, **add yourself as a New Contact**.

Maintain Contacts

Current Contacts

Organizational Quality Associates Inc

Current Contacts Personalize | Find | [Print] | [Grid] First 1 of 1 Last

Description	Name		

Add a New Contact

If your name does appear, select **Edit** and make sure all information is correct. Click **Save** when finished.

The screenshot shows a web form titled "Maintain Contacts" with a sub-section "Contact Information". The form is for "Organizational Quality Associates Inc". Fields include: Description (Sales Manager), Name (Sean Tracy), Email ID (seantracy@ideo.com), URLID (ideaartco.com), Location (Main), Role (Sales Contact), and Status (Active). Below this is a "Telephone Information" section with a table for adding phone numbers. The table has columns for *Type, Prefix, Phone, and Ext. One row is filled with Business Phone, 800, 555-2345, and an empty Ext field. There are "Add" and "Delete" buttons for each row. At the bottom of the form is a "Save" button.

*Type	Prefix	Phone	Ext
Business Phone	800	555-2345	

You will receive an onscreen confirmation when a contact is successfully saved. To add more contacts, repeat the process.

Add 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. Using the grey menu bar, select *Main Menu > Maintain Supplier Information > User Profiles*. Click on the **Add a New Value** tab, enter a User ID (login name) for the new User and click **Add**.

The screenshot shows the "User Profiles" page in the County of Sonoma system. The breadcrumb trail is "Main Menu > Maintain Supplier Information > User Profiles". The page has a "Security" section with two tabs: "Find an Existing Value" and "Add a New Value". The "Add a New Value" tab is selected and highlighted with a red box. Below the tabs is a "User ID" input field containing "jvelasquez". At the bottom of the form is an "Add" button, also highlighted with a red box.

Now 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.

Click **Add a User Role**.

The screenshot shows the 'Setup User' interface. At the top, there is a 'Logon Information' section with the following fields: 'User ID' (jvelasquez), 'Description' (Vice President), a checkbox for 'Account Locked Out?', 'Operator Password (Encrypted)', 'Confirm Password', '*E-mail Address' (jvelasquez@deaartco.com), and 'Language Code' (English). Below this is a 'User Roles' section with a table and an 'Add a User Role' button. At the bottom is a 'Supplier Access' section with a table and an 'Add a Supplier' button. The 'Save' button and 'Return to Search List' link are at the very bottom.

Role Name	Description

Supplier

Now select one or more roles for the new User by checking the appropriate box(es).

Event Supplier – User can bid on solicitations.

SC_eSupplierAddressesContacts – User can add Contacts to 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.

Select **OK** when finished.

Select Roles

Roles Personalize | Find | View All | First 1-5 of 5 Last

Role Name	Description
<input checked="" type="checkbox"/> Event Vendor	SC Event Vendor
<input checked="" type="checkbox"/> SC_eSupplierAddressesContacts	eSupplier Addresses/Contacts:
<input checked="" type="checkbox"/> SC_eSupplierAdmin	eSupplier Administrator
<input checked="" type="checkbox"/> SC_eSupplierUserManageOrders	eSupplier Manage Orders
<input checked="" type="checkbox"/> SC_eSupplierUserReviewPayments	eSupplier Review Payments

OK Cancel

Click **Add a Supplier**.

Supplier Access

Personalize | Find | First 1 of 1 Last

Supplier

Add a Supplier

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

Select a Supplier

Supplier Names Personalize | Find | First 1 of 1 Last

Supplier
<input checked="" type="checkbox"/> Organizational Quality Associates Inc

OK Cancel

Locking Out a User

Users can be locked out and 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.

View and Change Company Addresses

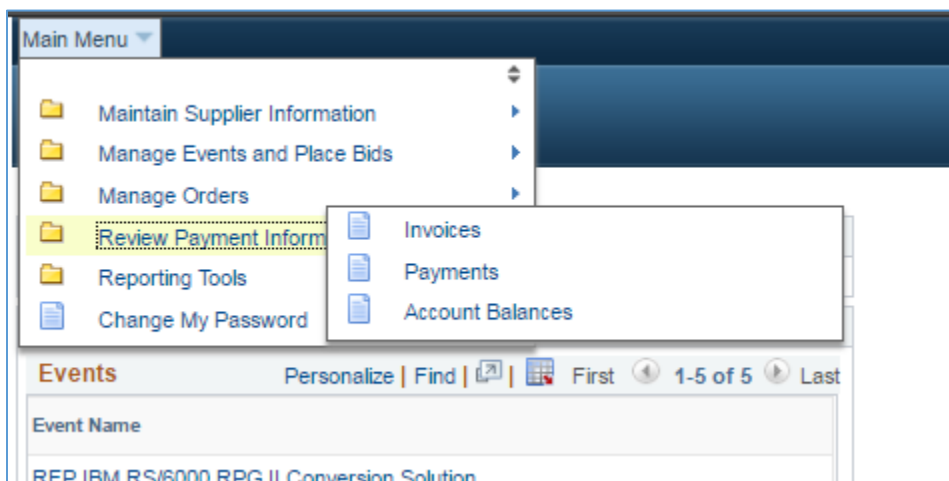
To view addresses, navigate to *Main Menu > Maintain Supplier Information > Addresses > Edit*. Addresses will display, but address changes must be made by the County.

To change your company's address, email our [Supplier Desk](#) with your request and include the following information:

- New Address(es)
- 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.

View Invoices, Payments, and Account Balances

Navigate to *Main Menu > Review Payment Information*. Select Invoices, Payments, or Account Balances and search for desired information.



View Purchase Orders, Order Summaries, and Receipts

Navigate to *Main Menu > Manage Orders*. From there, you can select the appropriate category and search for desired information.

