



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 information on accessing and updating your Supplier Account. You can navigate to a particular topic by selecting the topic from the table of contents.

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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.



Sonoma County Portal

Welcome to the Sonoma County Supplier Portal. This site is best viewed with Microsoft Edge or Google Chrome. You may need to disable your internet browser's pop-up blocker to fully access this website.


The County only accepts electronic bids submitted through the Supplier Portal. Hard copy, faxed, and/or emailed submissions will not be accepted.

Registration is required in order to view bid documents, receive bid alerts and addenda, and bid on County solicitations; instructions and additional support are available in FAQ section below.


System may be temporarily unavailable for maintenance: Tuesdays 6:00-7:30am and Thursdays 5:30-7:30pm.

Effective January 1, 2024, the County's Living Wage rate increased from \$17.65 to \$18.10 per hour. The increase was approved by the Sonoma County Board of Supervisors on December 12, 2023 in accordance with Municipal Code section 2-377(d). All county government service contractors must pay employees at least the current living wage rate. Questions? Email livingwage@sonoma-county.org.

Sign In




Bidding Opportunities




01 Opportunities

User Registration



View Registration Options.

Executive Order N-6-22



Required Compliance

Sign In

User ID

JANEDOE

Password

.....

☐ Enable Screen Reader Mode

Sign In

Forgot Password?

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**.

Instructional Documents

[How to View a Solicitation and Submit a Bid](#)
[Supplier Account Management Instructions](#)

To view the documents linked above, you must have Adobe Reader, or comparable application, to view PDF's. Additional instructions can be found in the FAQs section of this portal. Please email supplier-desk@sonoma-county.org if you experience difficulties using this site.

Bidding Opportunities

02 Events

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**.

Sonoma County Supplier Portal

Maintain User Account

Manage User Profiles

Manage Supplier Addresses

Manage Supplier Contacts

Maintain My User Contact

My Categorizations

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

My Categorizations

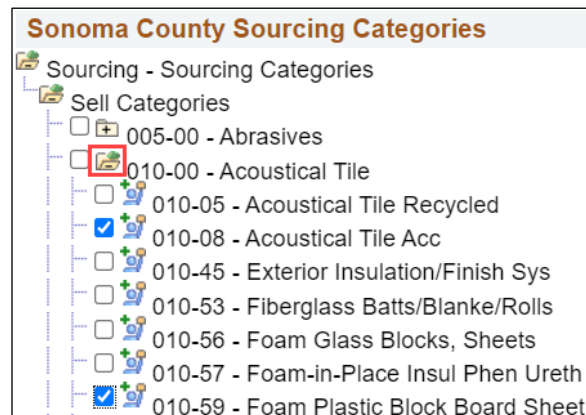
Sonoma County Sourcing Categories

Sourcing - Sourcing Categories

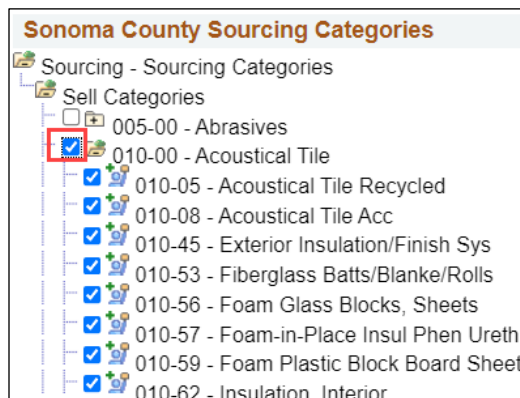
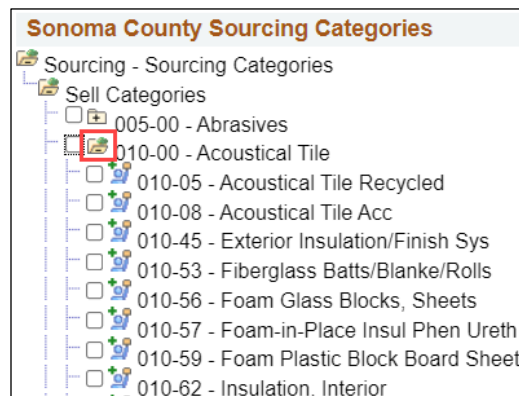
☐ Buy Categories

☒ Sell Categories

Search 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 icon** next to the category name to view the subcategories. Check as many categories and/or subcategories as necessary.



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.



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.

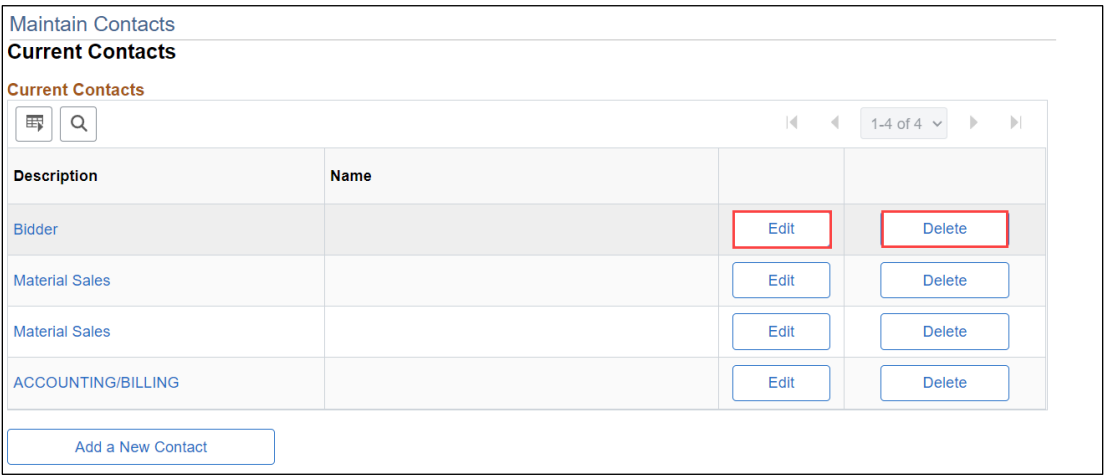
[Save](#)

Editing or Adding Contacts

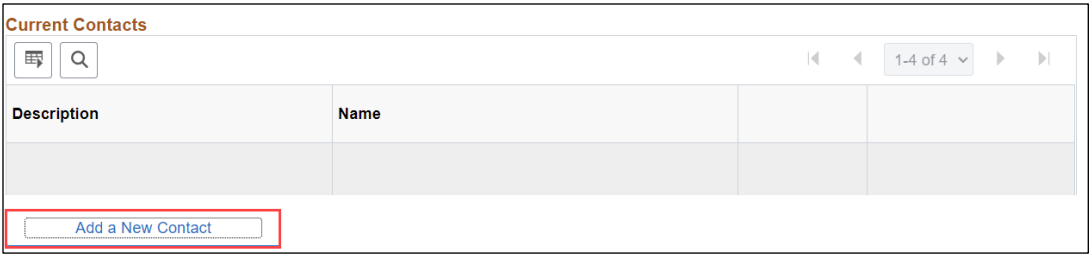
Contacts are designated employees of your organization that the County can confer with on business issues. On the left navigation pane, select **Maintain User Account** and then select **Manage Supplier Contacts**. You can edit or add new contacts in this section.



To Edit an existing contact, select the **Edit** button adjacent to the contact you wish to change and/or review. 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. A description must be entered for all contacts before changes can be saved, including deletions. Click **Save** when finished.

Supplier Contacts

Maintain Contacts

Contact Information

Description

Bidder

Name

Jane Doe

Email ID

Jane.Doe@example.com

URLID

http://

Location

General Mailing Address

Role

Executive Management

Status

Active

Telephone Information

1-1 of 1

Type	Prefix	Phone	Ext	
Business Phone	707	555-1234		<div>Add</div> <div>Delete</div>

Return to Contact List

Future Contacts

Save

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

Maintain Contacts

Save Confirmation

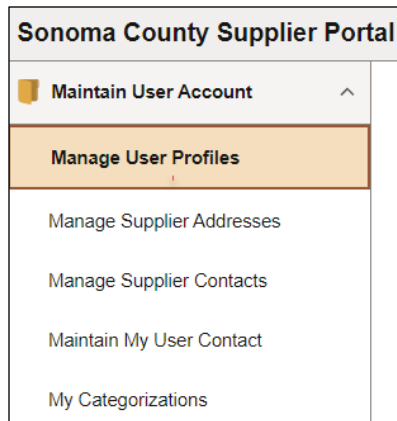
✓

The Save was successful.

OK

Adding New Users from Your Company

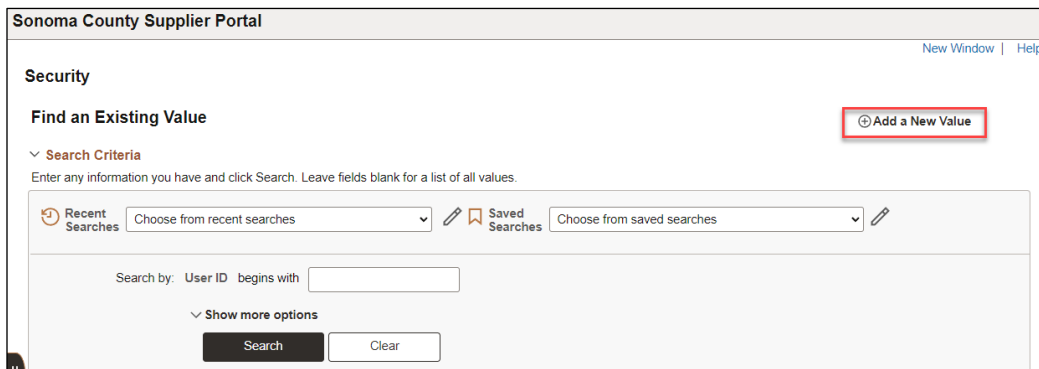
Users are employees of your organization who can log into and use the account. You can select specific permissions for each User or give everyone the same permissions. In the left navigation pane select **Maintain User Account** then select **Manage User Profiles**.



Sonoma County Supplier Portal

- Maintain User Account
 - Manage User Profiles**
 - Manage Supplier Addresses
 - Manage Supplier Contacts
 - Maintain My User Contact
 - My Categorizations

Click the **Add a New Value** button, enter a User ID (login name) for the new User and click **Add**.



Sonoma County Supplier Portal New Window | Help

Security

Find an Existing Value **Add a New Value**

Search Criteria
Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent Searches: Choose from recent searches | Saved Searches: Choose from saved searches

Search by: User ID begins with

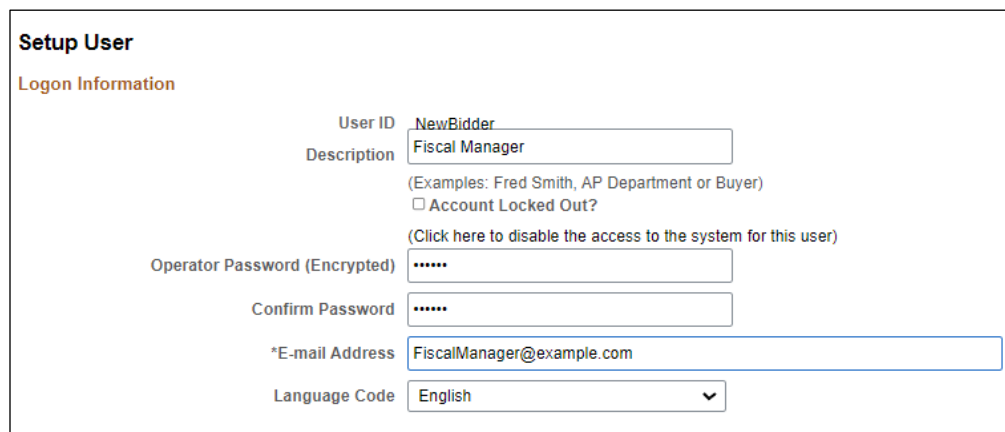
Enter User information in the Setup User screen:

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.



Setup User

Ligon Information

User ID:

Description:
(Examples: Fred Smith, AP Department or Buyer)
☐ Account Locked Out?
(Click here to disable the access to the system for this user)

Operator Password (Encrypted):

Confirm Password:

*E-mail Address:

Language Code:

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](#).

Role Name	Description
Event Vendor	SC Event Vendor

[Add a User Role](#)

Select one or more roles by checking the box next to the role. Role descriptions and permissions are as follows:

- 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.

Select **OK** when finished.

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

[OK](#) [Cancel](#)

Click [Add a Supplier](#).

Supplier	

[Add a Supplier](#)

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

Select a Supplier

Supplier Names

Q

1-1 of 1

Supplier
<div><input checked="" type="checkbox"/></div> <div>Business Name Here</div>

OK

Cancel

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.

Sonoma County Supplier Portal

Maintain User Account

Manage User Profiles

Manage Supplier Addresses

Manage Supplier Contacts

Maintain My User Contact

My Categorizations

POs, Invoices and Payments

Change My Password

Security

Find an Existing Value

Search Criteria

Enter any information you have and click Search. Leave fields blank for a list of

Recent Searches

Choose from recent searches

Search by: User ID begins with

Show more options

Search

Clear

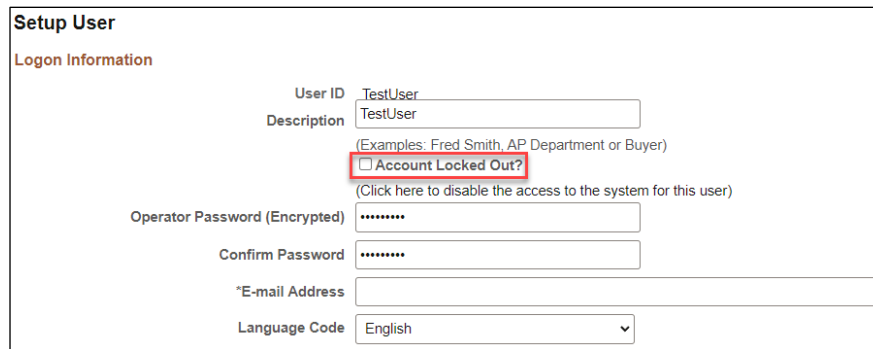
Select the **User ID** for the profile to be locked.

Search Results

View All

User ID	Description
Fiscal	Fiscal

Check the box for “[Account Locked Out?](#)” to lock the account.



The screenshot shows a 'Setup User' form with the following fields and options:

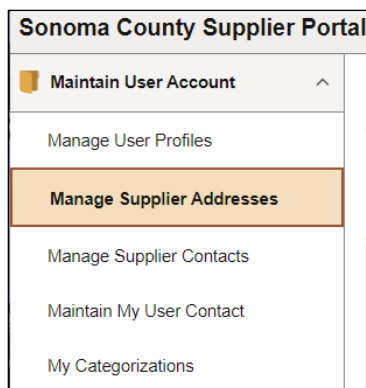
- Logon Information** (Section Header)
- User ID**: Text input field containing 'TestUser'.
- Description**: Text input field containing 'TestUser'. Below it, a note says '(Examples: Fred Smith, AP Department or Buyer)'.
- Account Locked Out?**: A checkbox, which is highlighted with a red rectangle. Below it, a note says '(Click here to disable the access to the system for this user)'.
- Operator Password (Encrypted)**: Password input field with masked characters '*****'.
- Confirm Password**: Password input field with masked characters '*****'.
- *E-mail Address**: Text input field.
- Language Code**: Dropdown menu set to 'English'.

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 current addresses, use the left navigation pane and go to [Maintain User Account](#) to expand the folder then select [Manage Supplier Addresses](#).



The screenshot shows the 'Sonoma County Supplier Portal' navigation menu. The 'Maintain User Account' folder is expanded, showing the following options:

- Maintain User Account (Folder icon)
- Manage User Profiles
- Manage Supplier Addresses** (Highlighted with an orange background)
- Manage Supplier Contacts
- Maintain My User Contact
- My Categorizations

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

Maintain Addresses	
Current Addresses	
Address List	
<div> <div> <div></div> <div></div> </div> <div> <div></div> <div></div> </div> </div>	
Addresses	Address Use
Description	Address Type
General Mailing Address	Business

Viewing Invoices, Payments, and Account Balances

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

Sonoma County Supplier Portal	
<div> <div></div> <div>Maintain User Account</div> <div>▼</div> </div>	
<div> <div></div> <div>POs, Invoices and Payments</div> <div>^</div> </div>	
Review Purchase Orders	
View Supplier Invoices	
Review Supplier Payments	
Account Balances	