SUPPLIER REGISTRATION INSTRUCTIONS

County of Sonoma Supplier Portal

Register as a **Supplier** if your company previously received payment from the County of Sonoma for goods and/or services. If your company has not previously done business with the County, register as a **Bidder**.

If you experience technical issues during registration, email the Supplier Desk for prompt assistance. Please include screen captures of the issue if possible.

Navigate to the Sonoma County **Supplier Portal** and click on **User Registration**.
This will direct you to the User Registration page. On this page, under **Register as a Supplier**, click **Register now**.

The **Register now** link brings up a pop-up window, entitled **Supplier Registration**, where the registration process will take place. Once you begin your registration process, **do not** close the registration window. Closing this window will cause data entered to be lost, and entries cannot be retrieved. This pop-up window will close automatically at the end of the successful registration process.
**Enter Registration Information**

**Supplier ID:** Enter your County Supplier ID number. If you do not have it on hand, please request it from our Supplier Desk.

**Tax Identification Number:** Enter Tax Identification Number or Social Security Number associated with your Supplier ID in the following format: 123456789. Do not use spaces, dashes, or any other characters.

**User ID** - Enter desired login name without spaces.

**Password** - Create a password with a minimum of 8 characters. You may use the following special characters: ! @ # $ % ^ & * ( ) - = + \ [ ] { } ; : / . < >

**Confirm** - Retype password. Please save your User ID and password for future reference.

**Description** - Enter job title.

**Email ID** - Enter email address.

**Terms and Conditions** - Click box to accept the Terms of Agreement.

Click Submit.
Registration Confirmation
You will receive an onscreen confirmation following successful registration. Click OK to close the pop-up Supplier Registration window.

You will also receive confirmation emails from PeopleSoft. The email with the subject “New User Account Creation” contains your User ID (example redacted). Please save this email for future reference.

You will also receive a confirmation email with the subject “User ID Registration.” This email is to inform you that you have registered as a Supplier with the County, and it is not necessary for you to keep this email. The information contained in this email is also included in your New User Account Creation email.

Please continue – additional account configuration is needed in order to receive emailed notifications of County solicitations.

Once the pop-up window is closed, you will be redirected to the homepage where you can now Sign In to place bids.
Sign in by entering your newly created User ID and Password and selecting **Sign In**.

![Sign In](image)

County of Sonoma Suppliers are responsible for self-managing their accounts, 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.

**Profile Configuration Steps**

In order to complete your User Profile configurations, select the tile that states **Click Here to Begin**.

![Instructional Documents](image)

**Select 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** 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**.** Please note that it may take several minutes to save your progress if many categories are selected.

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.
Add 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 Manage Supplier Contacts. You can edit and add new contacts in this section. Without a contact assigned, your organization will not receive bid notifications.

The image below shows the Current Contacts if there is not a contact assigned to your organization. To add a contact, select the Add a New Contact button.
The redacted image below shows the Current Contacts for an organization with multiple existing contacts. 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.

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.
Add New Users from Your Company

Users are people in your company who can login to 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.

Click on the Add a New Value tab, 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**. Click **Save** on the next screen.

Congratulations! You have performed basic configuration of your online Supplier account. For advanced configuration, please refer to the [Supplier Account Management Instructions](#).