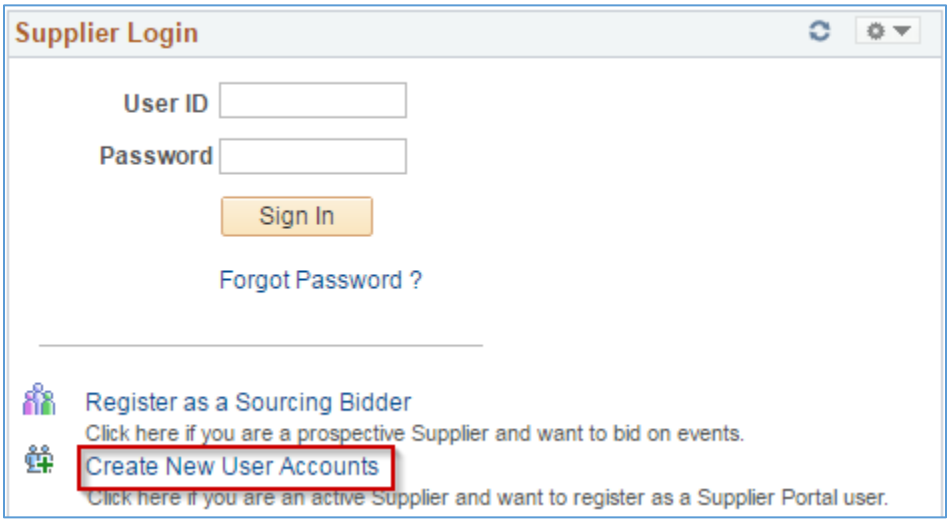
SUPPLIER REGISTRATION INSTRUCTIONS

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 a screenshot(s) of the issue if possible.

Navigate to the Sonoma County Supplier Portal and click on **Create New User Accounts**.



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** 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: ! @ # $ % ^ & * ( ) - = + \ [ ] { } ; : / ? . > <

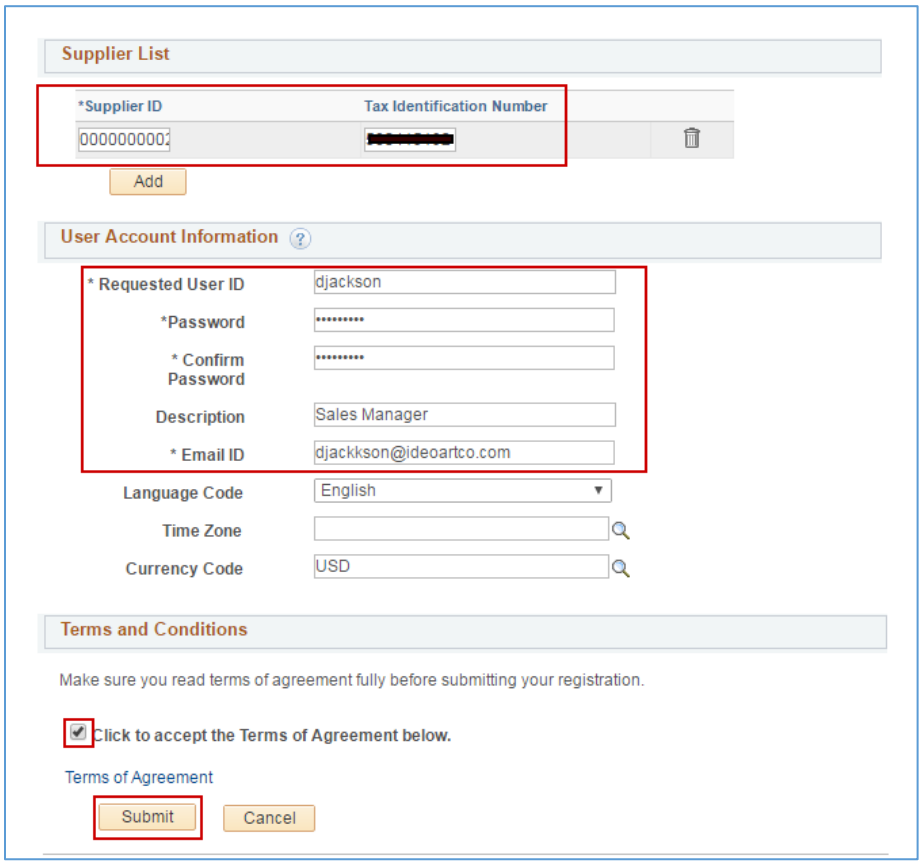
Confirm - Retype password. Please save your User ID and password for future reference.

Description - Enter **job title**.

Email ID - Enter **email address**.

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

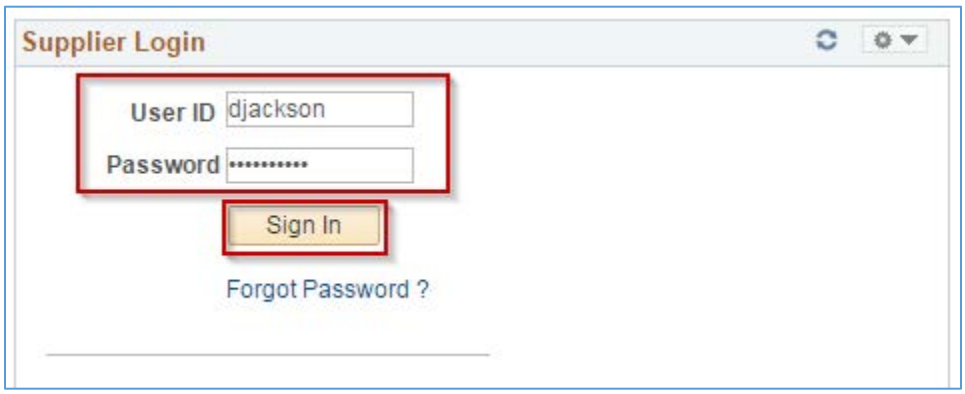
Click **Submit**.



On the page that states your user account has been created click **OK**.

Please continue – you are not done yet. You have created an account, but need to configure the account in order to receive emailed notifications of County solicitations.

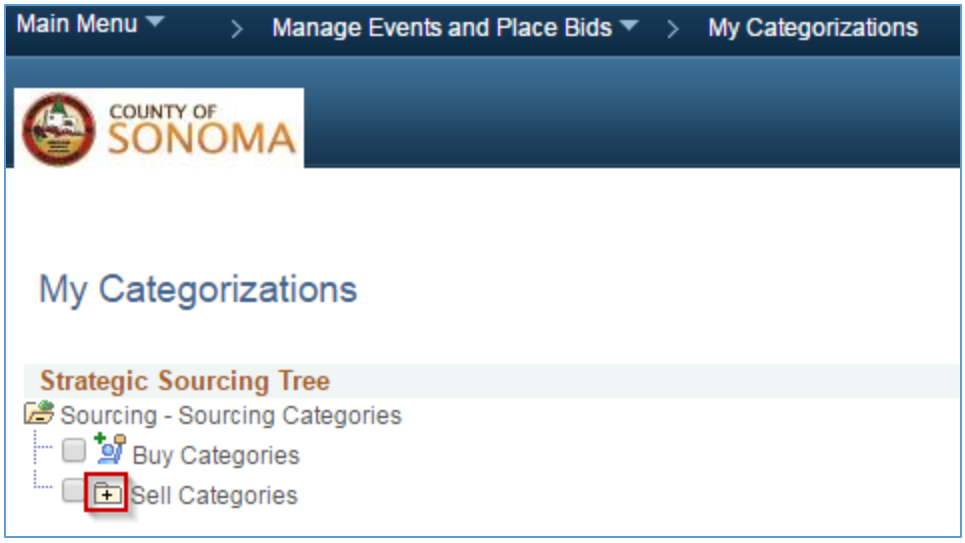
Login using your newly created User ID and Password.



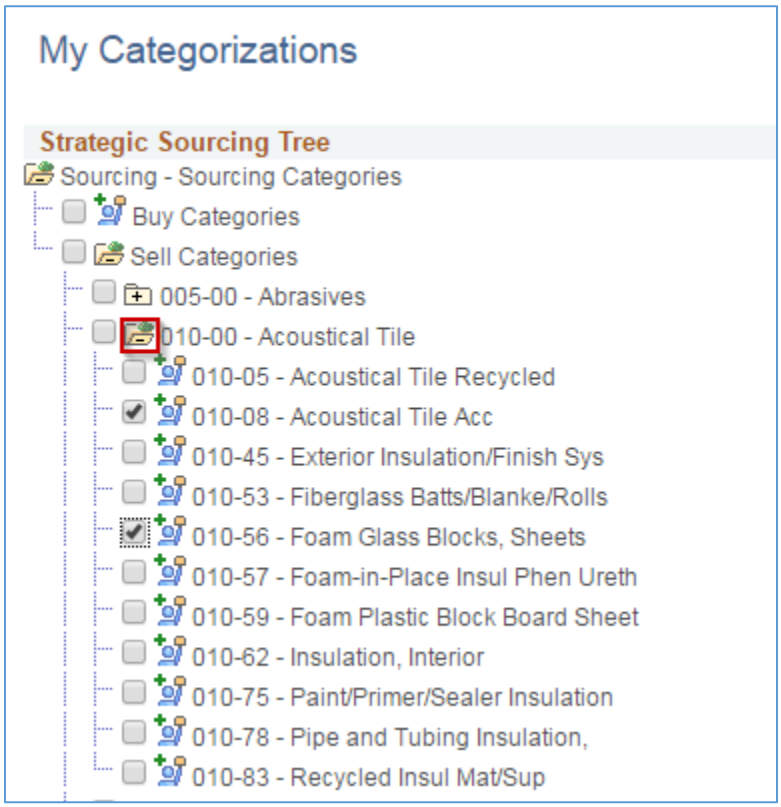
Select Categories

The County emails solicitation notifications to Bidders 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**.

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

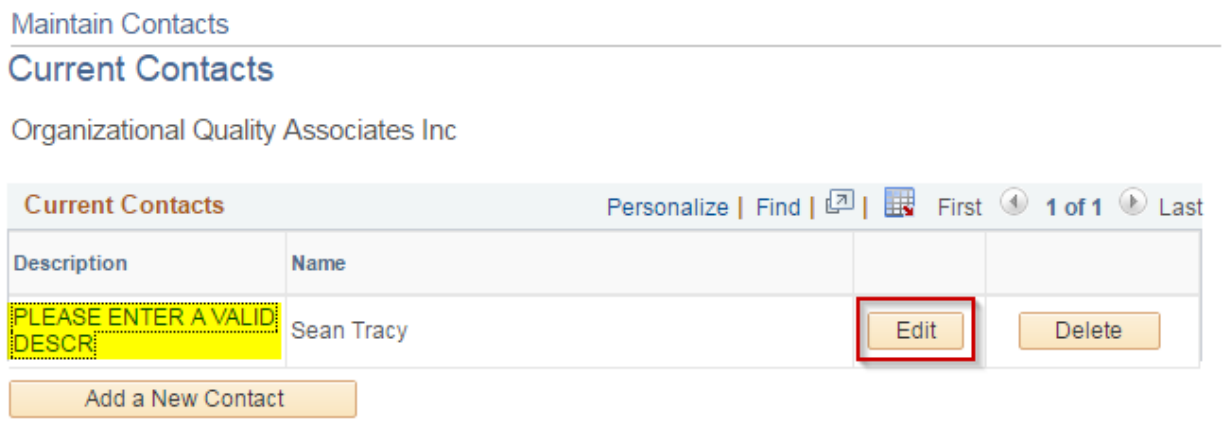


Search for the category list for goods and/or services your organization provides. Scroll, or use the Control+F command to search by keyword. When you have identified a category, click on the **file folder** next to the **category name** to view the subcategories. Check as many categories and/or subcategories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

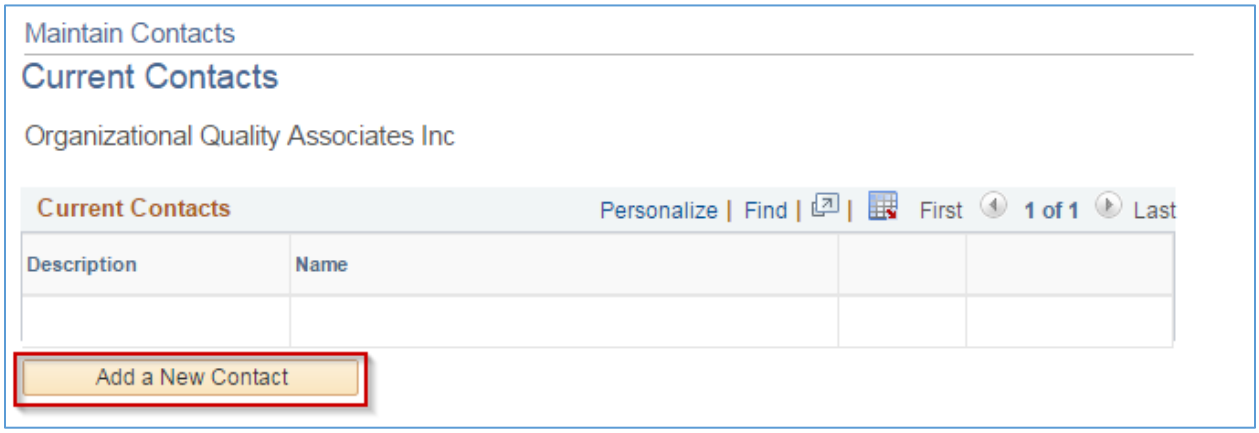


Add Contacts

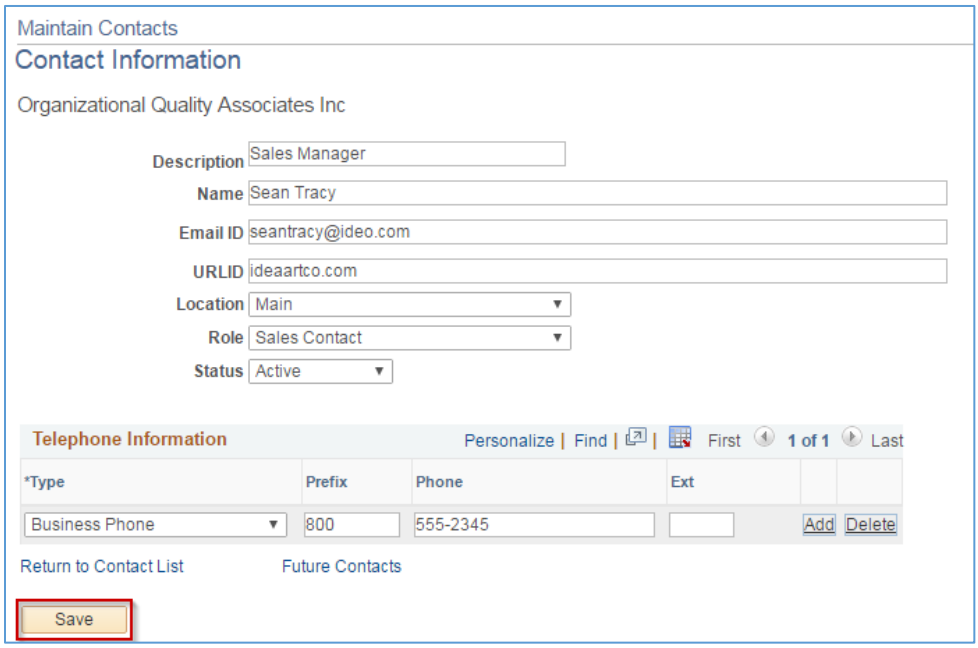
Contacts are designated employees that the County can confer with on business issues. Using the grey menu bar, select *Main Menu > Maintain Supplier Information > Contacts*. You can edit or delete existing contacts, and add new contacts. If there is text in the Description or Name fields, select **Edit**. 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.



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



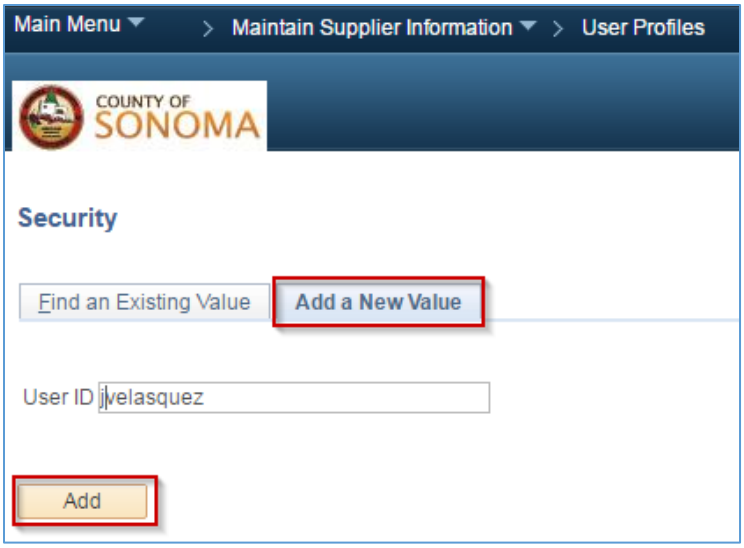
If your name does appear, select **Edit** and make sure all information is correct. Click **Save** when finished.



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**.



Now enter User information in the Setup User screen:

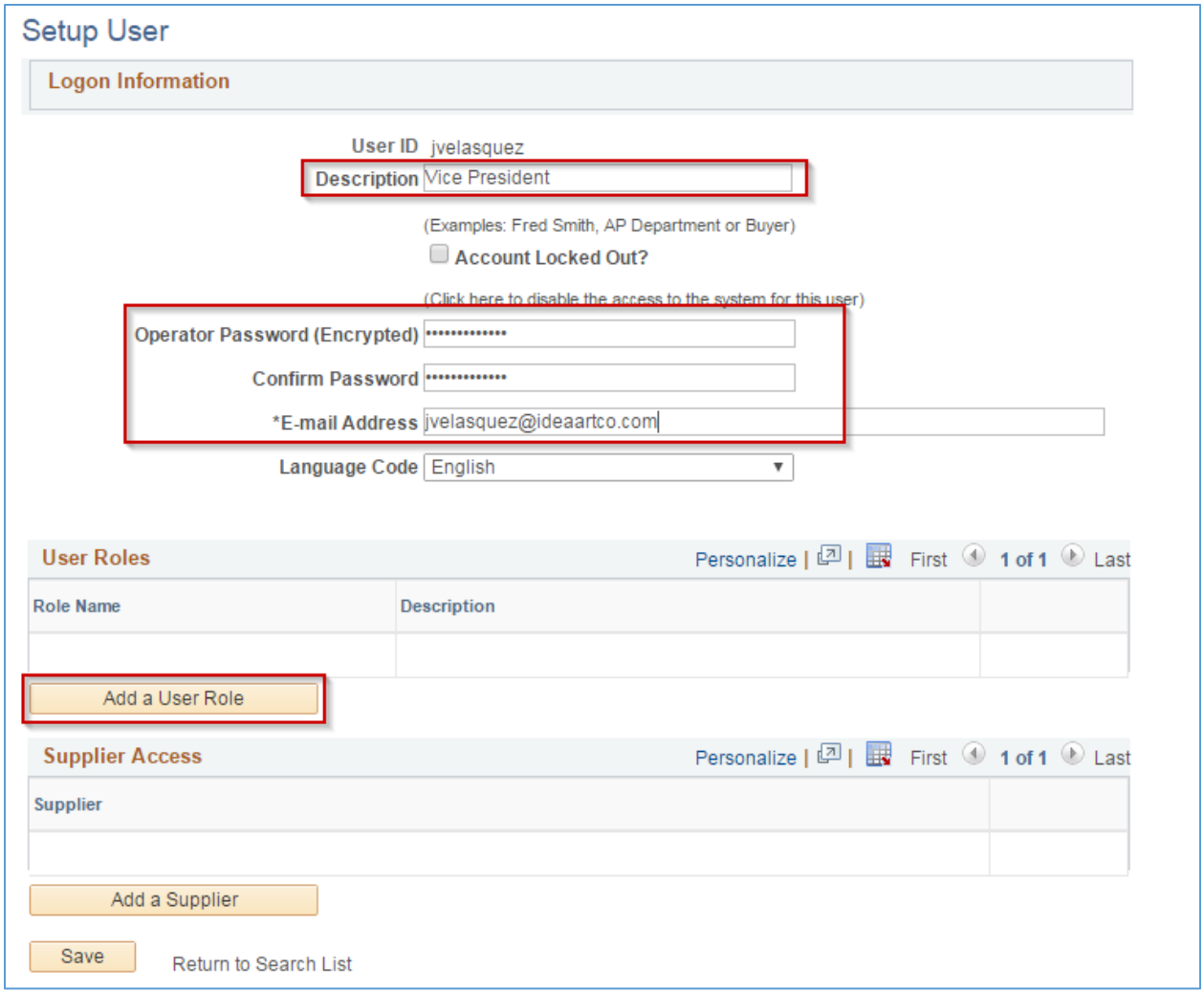
Description - Enter User's job title.

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**.



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

Event Supplier – User can bid on solicitations.

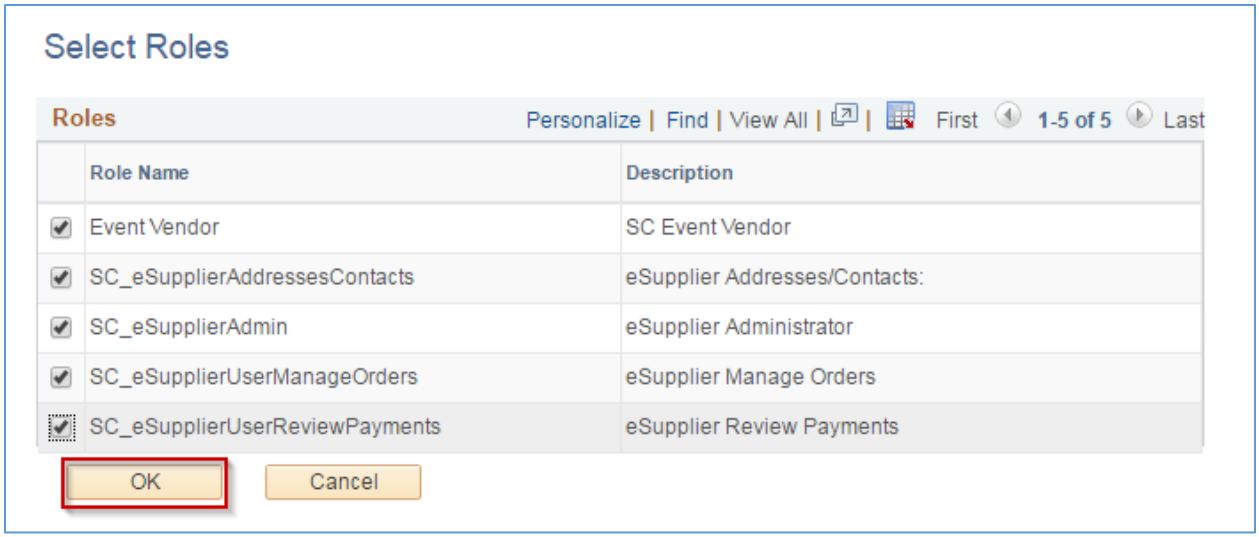
SC_eSupplierAddressesContacts – User can add Contacts to account.

SC_eSupplierAdmin – User can create, update, and assign roles to other users.

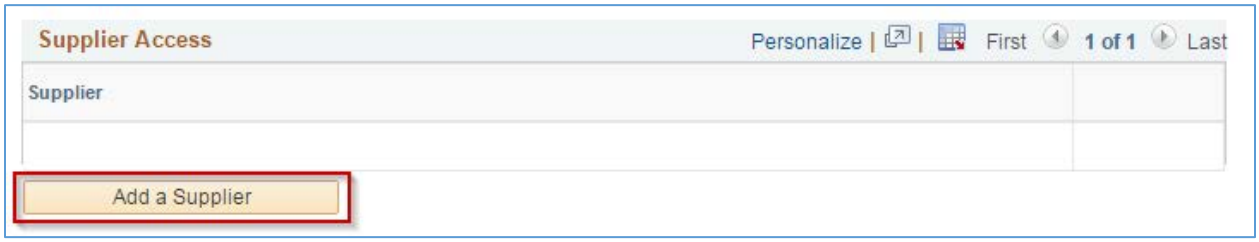
SC_eSupplierUserManageOrders – User can review Purchase Orders, Order Summaries, and Receipts.

SC_eSupplierUserReviewPayments – User can review invoices, payments, and account balances.

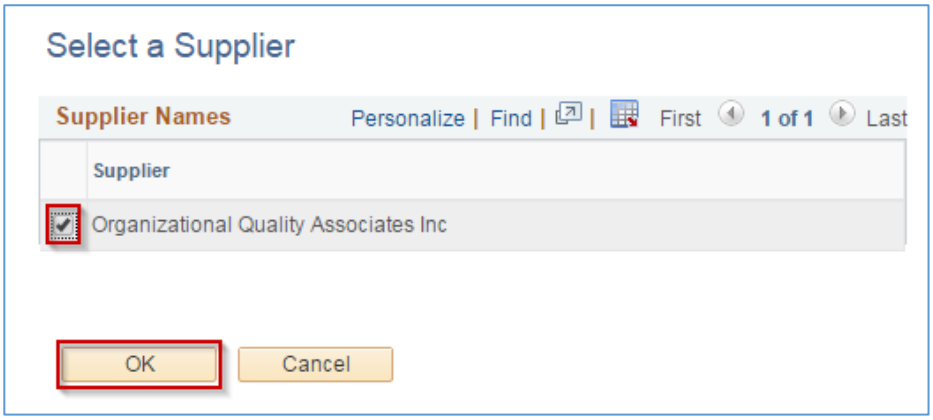
Select **OK** when finished.



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 Supplier Account Management Instructions.

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.