

Vendor Account Maintenance Instructions

For Vendors Registered in the Supplier Portal

January 2015



COUNTY OF
SONOMA

Vendor Account Maintenance

County of Sonoma Vendors are responsible for self-managing and updating their account information online.

Accounts should be checked and updated regularly to assure uninterrupted access to County of Sonoma bids.

[Click here to login to your existing Vendor account](#)

Instructions on how to update & maintain your account
continues on the following pages.

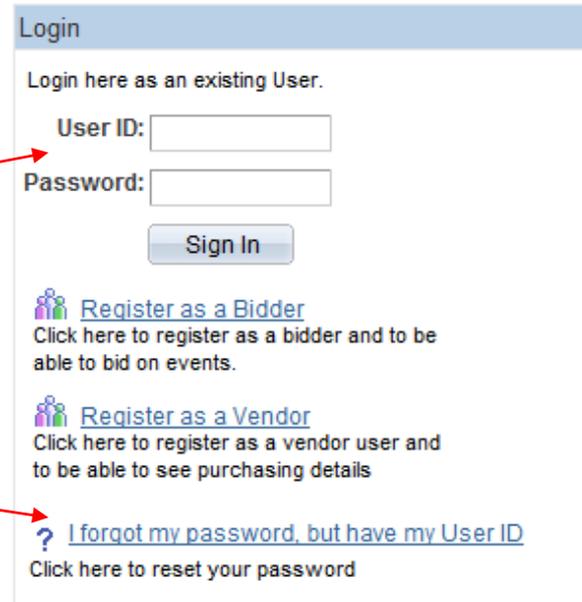
Supplier Portal Login Screen

This image may differ slightly from the actual screen, as it was taken while still in testing.

Login with UserID and password.

Forgotten passwords can be reset here.

If UserID is not available, request it from the department you normally work with, or send an email to efs-vendor-desk@sonoma-county.org. Once you have your UserID, you can reset your password and login.



The screenshot shows a login form with a blue header bar containing the word "Login". Below the header, the text "Login here as an existing User." is displayed. There are two input fields: "User ID:" and "Password:". Below these fields is a "Sign In" button. Underneath the button, there are three links, each with a small icon of three people. The first link is "Register as a Bidder" with the text "Click here to register as a bidder and to be able to bid on events." below it. The second link is "Register as a Vendor" with the text "Click here to register as a vendor user and to be able to see purchasing details" below it. The third link is "? I forgot my password, but have my User ID" with the text "Click here to reset your password" below it. Red arrows from the text on the left point to the "User ID:" field, the "Sign In" button, and the "I forgot my password..." link.

IMPORTANT: Navigation Information

Please do not use the BACK button on the browser when navigating through the Supplier Portal. If you are in the middle of a transaction and use the BACK button on the browser, the transaction will not process.

Use buttons and links to navigate.

County of Sonoma
EFS

Favorites Main Menu > Maintain Supplier Information > Contacts

Maintain Contacts
Contact Information

Description: Bidder

Name:

Email ID:

URLID: http://

Location: General Mailing Address

Role:

Status: Active

Type	Prefix	Phone	Ext	
Business Phone				Add Delete

[Return to Contact List](#) [Future Contacts](#)

Save

* Required Field

Editing an Existing Contact – Part 1

You must have at least one Contact, and one should be designated to receive emailed bid notifications.

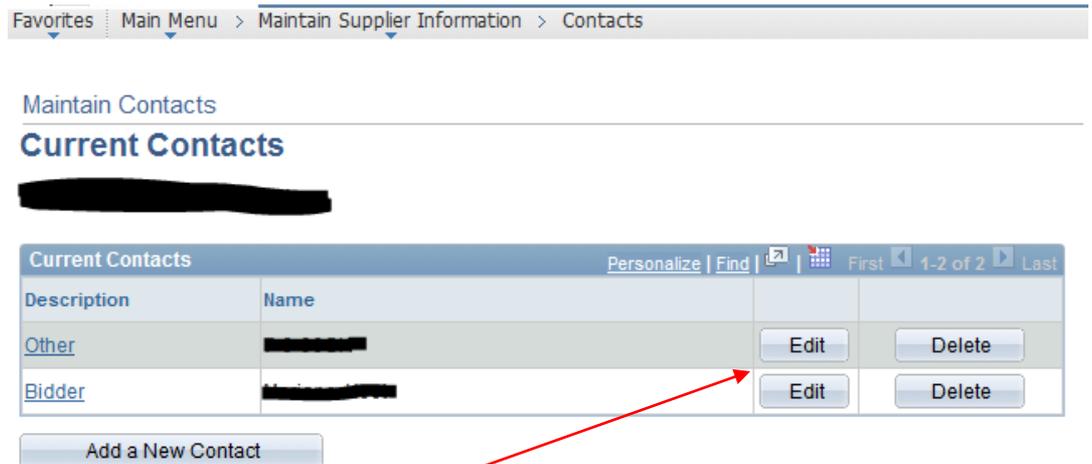
Entering Contacts will also enable the County to reach the correct person in case there are questions regarding your account.

Contacts cannot login and view account information.

Menu Path:

Main Menu > Maintain Supplier Information > Contacts

Select Contact for editing.



The screenshot shows a web application interface for managing contacts. At the top, a breadcrumb trail reads: Favorites | Main Menu > Maintain Supplier Information > Contacts. Below this is a section titled 'Maintain Contacts' with a sub-header 'Current Contacts'. A blacked-out area is visible below the sub-header. The main content is a table with the following structure:

Current Contacts		Personalize	Find	First	1-2 of 2	Last
Description	Name					
Other	[Redacted]	Edit	Delete			
Bidder	[Redacted]	Edit	Delete			

Below the table is a button labeled 'Add a New Contact'. A red arrow points from the text 'Select Contact for editing.' to the 'Edit' button of the 'Other' contact row.

Editing an Existing Contact – Part 2

Enter the following fields:

- Description - please use job title
- Name
- Email ID
- Location
- Role
- Phone Number with area code

Click “Save”

Favorites Main Menu > Maintain Supplier Information > Contacts

Maintain Contacts

Contact Information

[Redacted]

Description: Bidder

Name: [Text Box]

Email ID: [Text Box]

URLID: http://

Location: General Mailing Address

Role: [Text Box]

Status: Active

Telephone Information				Personalize	Find	First	1 of 1	Last
*Type	Prefix	Phone	Ext					
Business Phone	[Text Box]	[Text Box]	[Text Box]					Add Delete

[Return to Contact List](#) [Future Contacts](#)

* Required Field

Adding a New Contact

A Contact can receive emailed bid notifications. Entering Contacts will also enable the County to reach the correct person in case there are questions regarding your account.

Contacts cannot login and view account information.

Navigation Path: Main Menu > Maintain Supplier Information > Contacts

Select "Add a New Contact"

Enter Contact information, including:

- Description – please use job title
- Name
- Email ID
- Location
- Role
- Phone Number with area code

Click "Save"

The screenshot shows the 'Maintain Contacts' page with a table of 'Current Contacts'. The table has columns for 'Description' and 'Name'. There are two rows: one with 'Other' and one with 'Bidder'. Each row has 'Edit' and 'Delete' buttons. Below the table is an 'Add a New Contact' button. A red arrow points from the text 'Select "Add a New Contact"' to this button.

Description	Name		
Other	[REDACTED]	Edit	Delete
Bidder	[REDACTED]	Edit	Delete

The screenshot shows the 'Contact Information' form. It has several input fields: Description, Name, Email ID, URLID, Location (dropdown), Role (dropdown), and Status (dropdown set to 'Active'). Below the form is a 'Telephone Information' table with columns for 'Type', 'Prefix', 'Phone', and 'Ext'. There is one row for 'Business Phone' with empty input fields and 'Add' and 'Delete' buttons. At the bottom, there are links for 'Return to Contact List' and 'Future Contacts', and a 'Save' button. A red arrow points from the text 'Click "Save"' to this button.

Description:

Name:

Email ID:

URLID:

Location:

Role:

Status:

Type	Prefix	Phone	Ext		
Business Phone	<input type="text"/>	<input type="text"/>	<input type="text"/>	Add	Delete

Designating a Contact to Receive Emailed Bid Notifications

A Vendor may have multiple contacts. However, bid notifications will be sent to just one designated contact.

To designate the Contact who will receive emailed bid notifications, follow this navigation path: Main Menu > Manage Events & Place Bids > Maintain My User Contact. The top image shows Contact #2 is the person who receives bid notifications.

Click on the magnifying glass to display all contacts and their names.

Click on the Contact Sequence Number of the person who should receive bid notifications. You will be returned to the previous screen; then click "Save."

Navigation path: Favorites | Main Menu > Manage Events and Place Bids > Maintain My User Contact

Maintain Sourcing Contact Information

Please select your contact name with the prompt button in the list of companies below.

User ID: SCAUCVNDR8
Name: [REDACTED]

Company Contacts			Personalize Find	First	1 of 1	Last
	Bidder Type	*Contact Sequence Number				
[REDACTED]	Vendor	2	🔍			

Save

Look Up Contact Sequence Number

Search by: Contact Sequence Number = [REDACTED]

Look Up Cancel Advanced Lookup ? Help

Search Results

View 100 First 1-2 of 2 Last

Contact Sequence Number	Name 1
2	[REDACTED]
[REDACTED]	[REDACTED]

Add a New User – Part 1

Users can login, bid, and view account information. You may set up multiple Users on your account.

Navigation Path: Main Menu > Maintain Supplier Information > User Profiles > Add a New Value > type in desired new User ID > Add

Enter the following:

Description: Use job title

Password: create, at least 8 characters

Confirm Password: Re-enter password

Email: Enter User's email

Click "Add a User Role"

Favorites | Main Menu > Maintain Supplier Information > User Profiles

Setup User

Logon Information

User ID: samwhitely
Description: Sales Manager
(Examples: Fred Smith, AP Department or Buyer)
(Click here to disable the access to the system for this user)

Account Locked Out?:

Operator Password (Encrypted): ●●●●●●●●
Confirm Password: ●●●●●●●●

*E-mail Address: samwhitely@scaucvndr8.org
Language Code: English

User Roles	
Role Name	Description

Add a User Role

Supplier Access	
Name	

Add a Supplier

Save Return to Search List

Add a New User – Part 2

Select one or several roles for the new User by clicking the appropriate box(es).

Event Vendor

User can bid on solicitations.

SC_eSupplierAddressesContacts

User can add contacts to account.

SC_eSupplierAdmin

User has all roles described here.

SC_eSupplierUserManageOrders

User can review and acknowledge Purchase Orders, view Order Summaries, and view Receipts.

SC_eSupplierUserReviewPayments

User can review invoices, payments, and account balances.

Click “OK”.

Select Roles

Roles		Personalize Find View All   First  1-5 of 5  Last
	Role Name	Description
<input type="checkbox"/>	Event Vendor	SC Event Vendor
<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

Add a New User – Part 3

Click “Add a Supplier”.

Setup User

Logon Information

User ID: samwhitelty
Description: Sales Manager
(Examples: Fred Smith, AP Department or Buyer)
(Click here to disable the access to the system for this user)

Account Locked Out?:

Operator Password (Encrypted):
Confirm Password:

*E-mail Address: samwhitelty@scaucvndr8.org
Language Code: English

User Roles

Role Name	Description	
Event Vendor	SC Event Vendor	Delete

Add a User Role

Supplier Access

Name	

Add a Supplier

Save Return to Search List

Click check box next to Supplier Name.

Select a Supplier

Supplier Names

Name
<input checked="" type="checkbox"/> [REDACTED]

OK Cancel

Click “OK”.

Click “Save” on the next screen.

Categorization Information

Selection of categories is critical, as bid notifications are emailed to Vendors based upon the categories they select. Vendors must select a category (or categories) in order to receive emailed bid notifications.

Navigation Path: Main Menu > Manage Events & Place Bids > My Categorizations

Click the file folder icon next to “Sell Categories”.

The screen will expand. Next, Vendors should click the check box next to the five digit “parent” category (or categories) ending in - 00 (or categories) they wish to bid on.

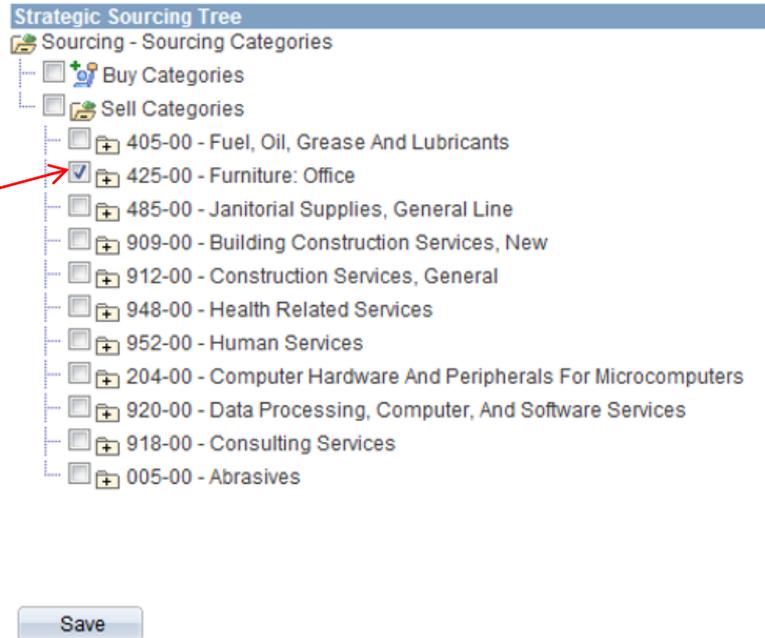
Subcategories can be viewed by clicking the file folder next to the parent category. Vendors may register for subcategories rather than a parent category, but clicking the parent category may result in more solicitation notifications.

Click “Save”.

My Categorizations



My Categorizations

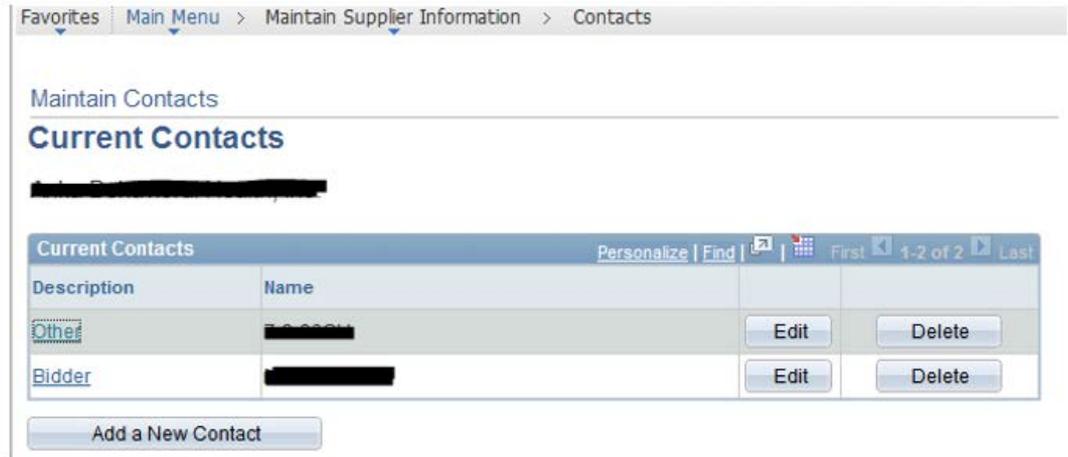


Deleting a Contact

Navigation Path:

Main Menu > Maintain Supplier Information > Contacts

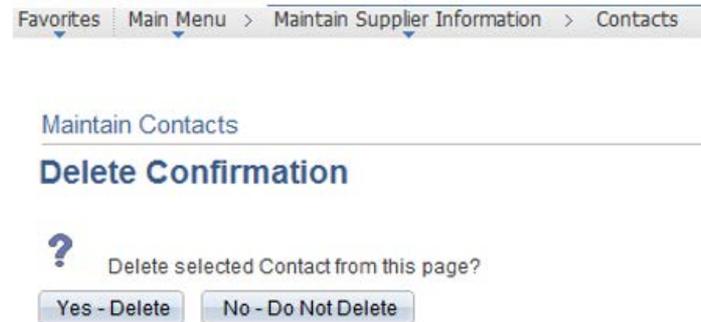
Identify Contact for deletion and click “delete”.



The screenshot shows the 'Maintain Contacts' page. At the top, there is a breadcrumb trail: 'Favorites | Main Menu > Maintain Supplier Information > Contacts'. Below this, the page title is 'Maintain Contacts'. The main heading is 'Current Contacts'. There is a search bar and a table with two columns: 'Description' and 'Name'. The table contains two rows: one with 'Other' and one with 'Bidder'. Each row has 'Edit' and 'Delete' buttons. Below the table is an 'Add a New Contact' button.

Description	Name		
Other	[REDACTED]	Edit	Delete
Bidder	[REDACTED]	Edit	Delete

Confirm deletion.



The screenshot shows the 'Delete Confirmation' dialog box. At the top, there is a breadcrumb trail: 'Favorites | Main Menu > Maintain Supplier Information > Contacts'. Below this, the page title is 'Maintain Contacts'. The main heading is 'Delete Confirmation'. There is a question mark icon and the text 'Delete selected Contact from this page?'. Below this are two buttons: 'Yes - Delete' and 'No - Do Not Delete'.

Maintain Company Addresses

Company addresses are view-only.

To view addresses, follow navigation path:

Main Menu > Maintain Supplier Information > Addresses > Edit.

Address will display but no changes can be made from the screen.

To change your company's address, email efs-vendor-desk@sonoma-county.org. Please include the following information:

- New Address
- New Phone
- Date Change will take effect
- If you have multiple addresses, please specify which addresses should be used for remitting, invoices, and general mailing.

The screenshot shows a web application interface for managing addresses. At the top, there is a breadcrumb trail: Favorites > Main Menu > Maintain Supplier Information > Addresses. Below this, the page title is 'Maintain Addresses' and the section is 'Current Addresses'. A redacted area is visible below the section title. The main content is an 'Address List' table with columns for 'Description', 'Address Type', and actions. The table contains three rows of business addresses. Each row has an 'Edit' button and an 'Inactive' button. Below the table is an 'Add a New Address' button.

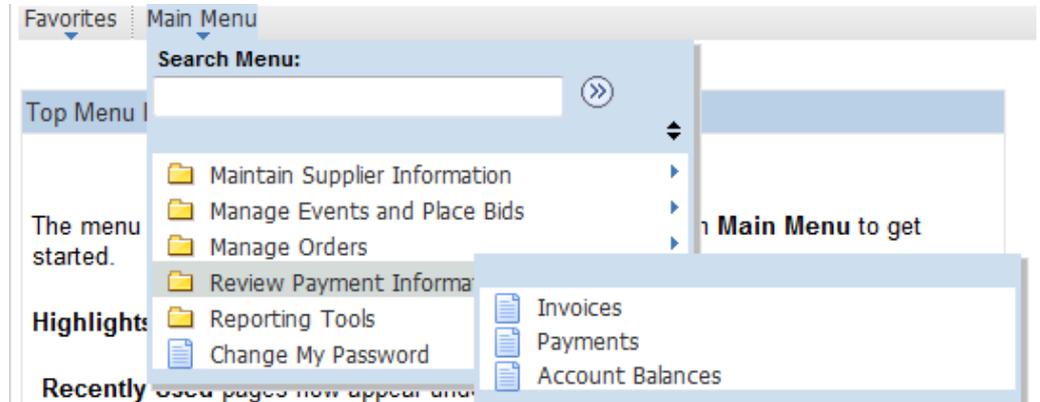
Description	Address Type		
General Mailing Address	Business	<input type="button" value="Edit"/>	<input type="button" value="Inactive"/>
Remit Address	Business	<input type="button" value="Edit"/>	<input type="button" value="Inactive"/>
-	Business	<input type="button" value="Edit"/>	<input type="button" value="Inactive"/>

Review Invoices, Payments and Account Balances

Navigation Path:

Main Menu > Review Payment Information

Select Invoices, Payments or Account Balances, and search for desired information.



Review and Acknowledge Purchase Orders, View Order Summaries and Receipts

Navigation Path:

Main Menu > Manage Orders

View or acknowledge Purchase Orders, view Order Summaries and Receipts by selecting the appropriate category, then searching for desired information.

