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.

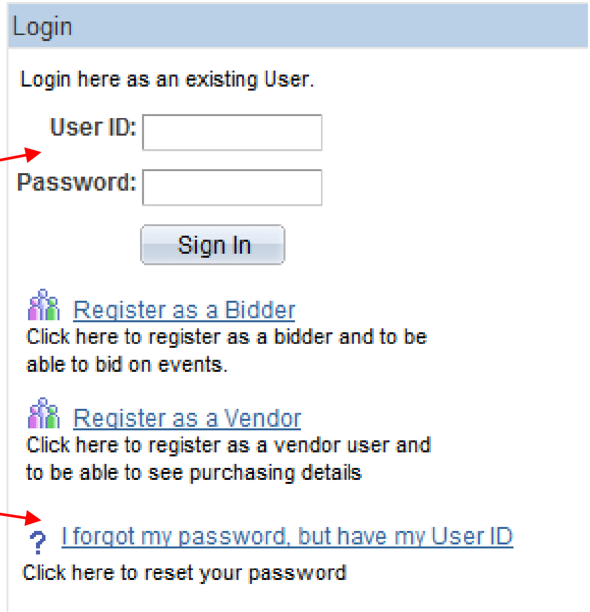
Accounts should be checked and updated regularly to assure uninterrupted access to County of Sonoma bids.

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.

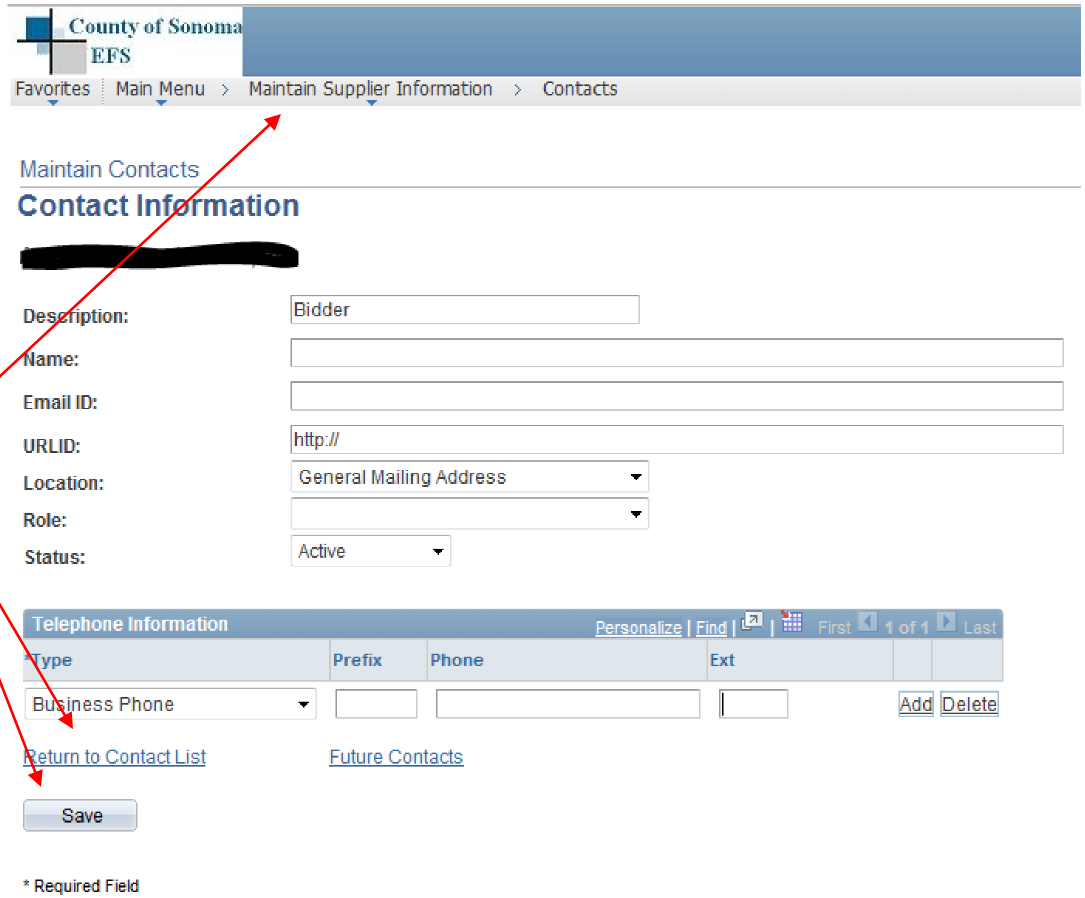
Forgotten passwords can be reset here.

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.

IMPORTANT: Navigation Information

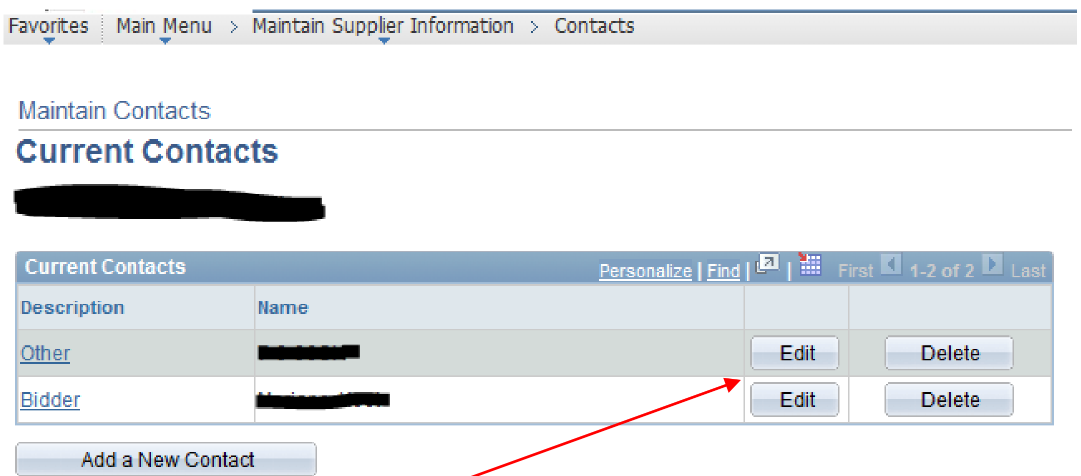
Please do not use the BACK button on the browser when navigating through the Supplier Portal. If you are in the middle of a transaction and use the BACK button on the browser, the transaction will not process.

Use buttons and links to navigate.



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 <u>cannot</u> login and view account information.

Menu Path:

Main Menu > Maintain Supplier Information > Contacts

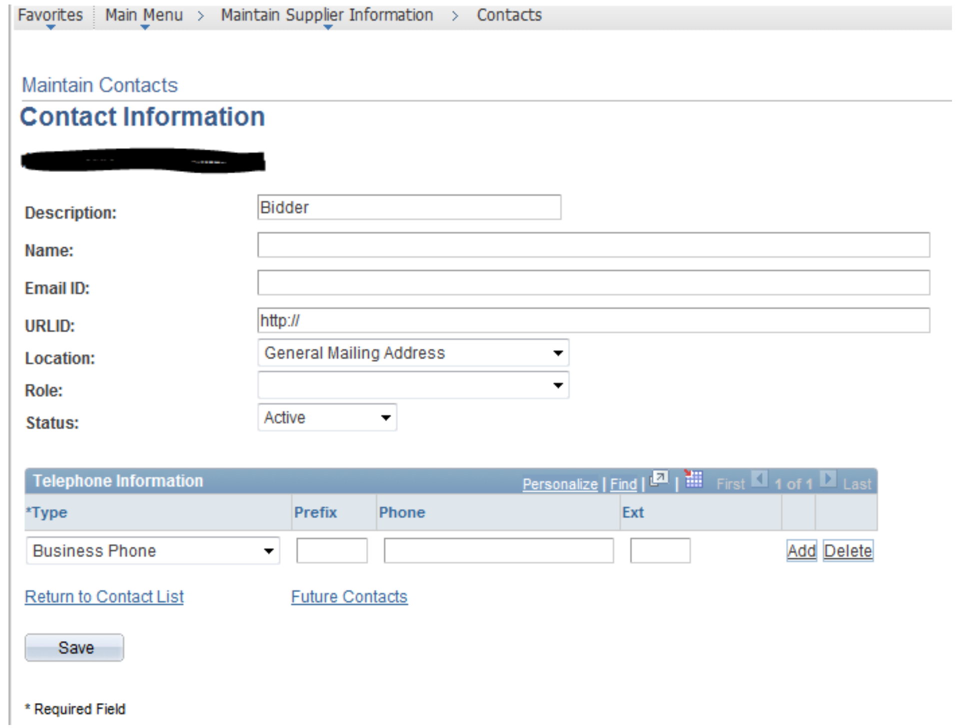
Select Contact for editing.

Editing an Existing Contact – Part 2

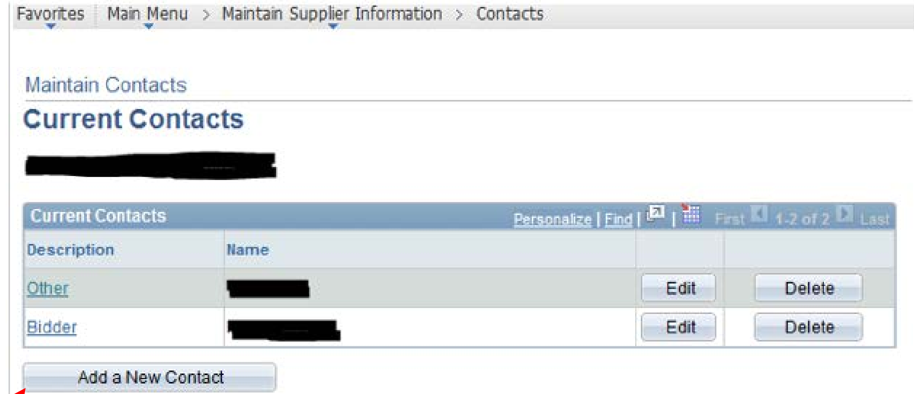
Enter the following fields:

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

Click “Save”



Adding a New Contact

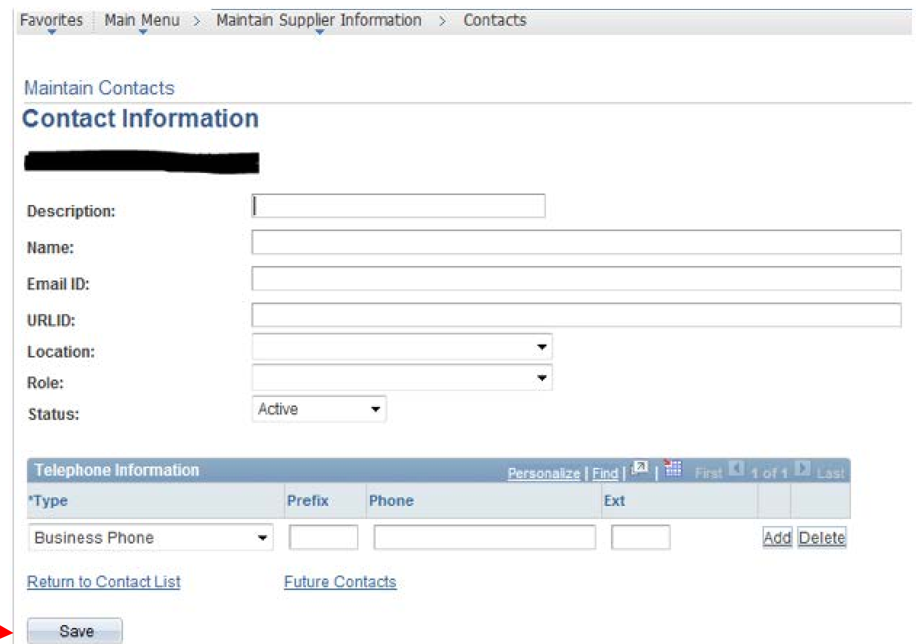


A Contact can receive emailed bid notifications. Entering Contacts will also enable the County to reach the correct person in case there are questions regarding your account.

Contacts <u>cannot</u> login and view account information.

Navigation Path: Main Menu > Maintain Supplier Information > Contacts

Select “Add a New Contact”



Enter Contact information, including:

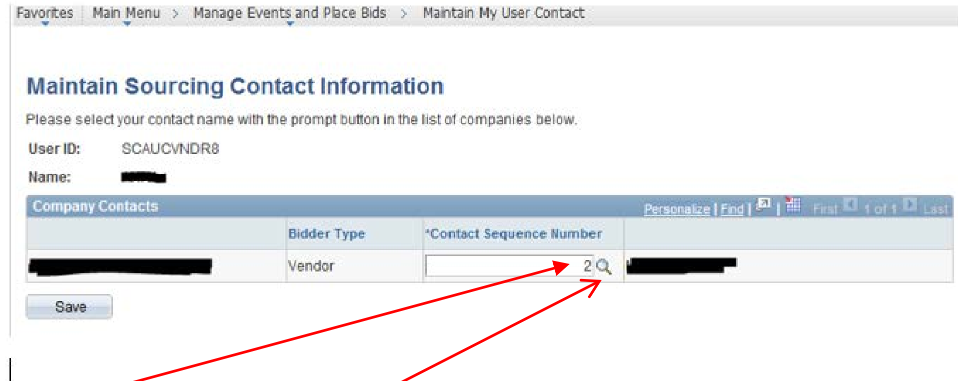
- Description – please use job title
- Name
- Email ID
- Location
- Role
- Phone Number with area code

Click “Save”

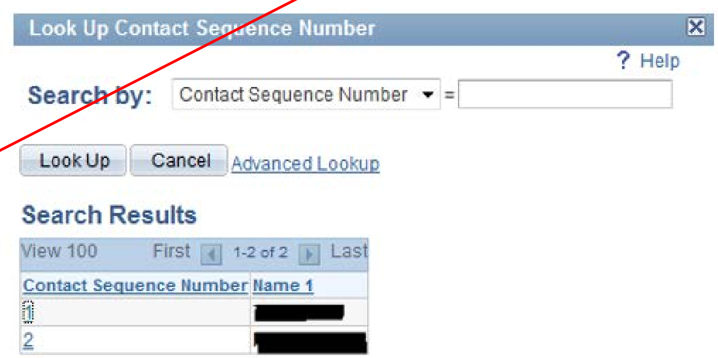
Designating a Contact to Receive Emailed Bid Notifications

A Vendor may have multiple contacts. However, bid notifications will be sent to just <u>one</u> 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."

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:

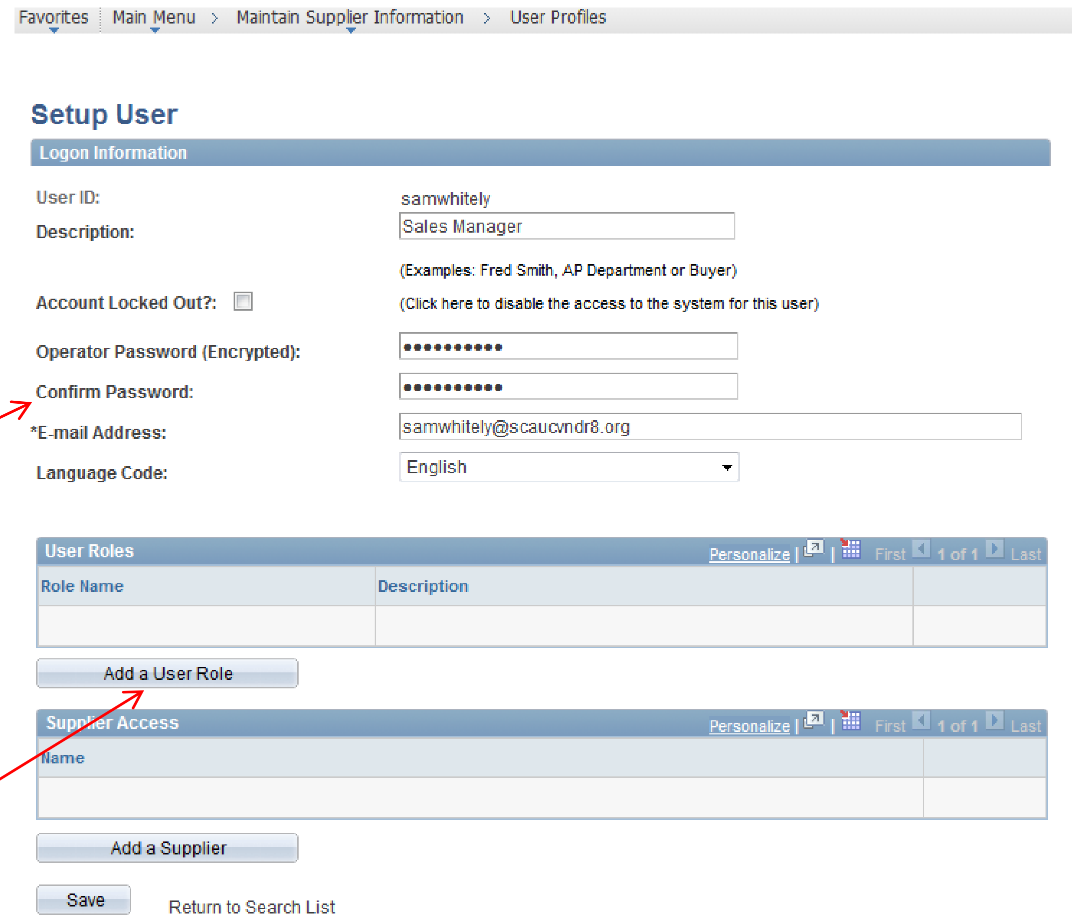
Description: Use job title

Password: create, at least 8 characters

Confirm Password: Re-enter password

Email: Enter User’s email

Click “Add a User Role”



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.

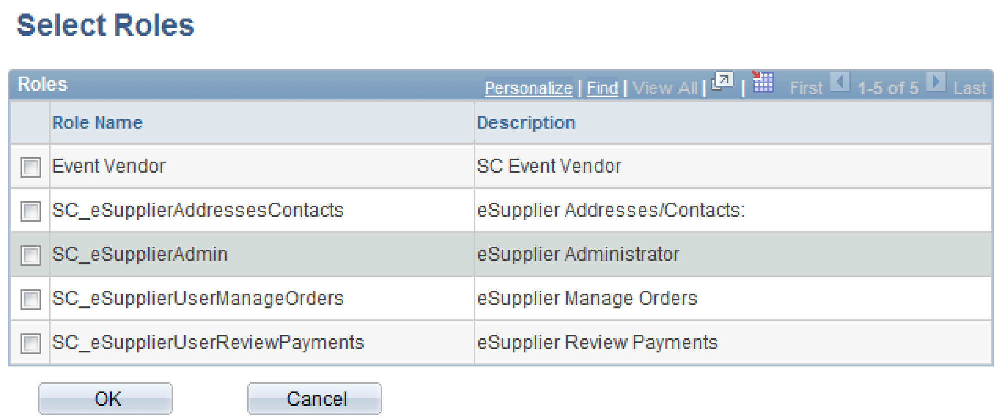
SC_eSupplierAddressesContacts
User can add contacts to account.

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

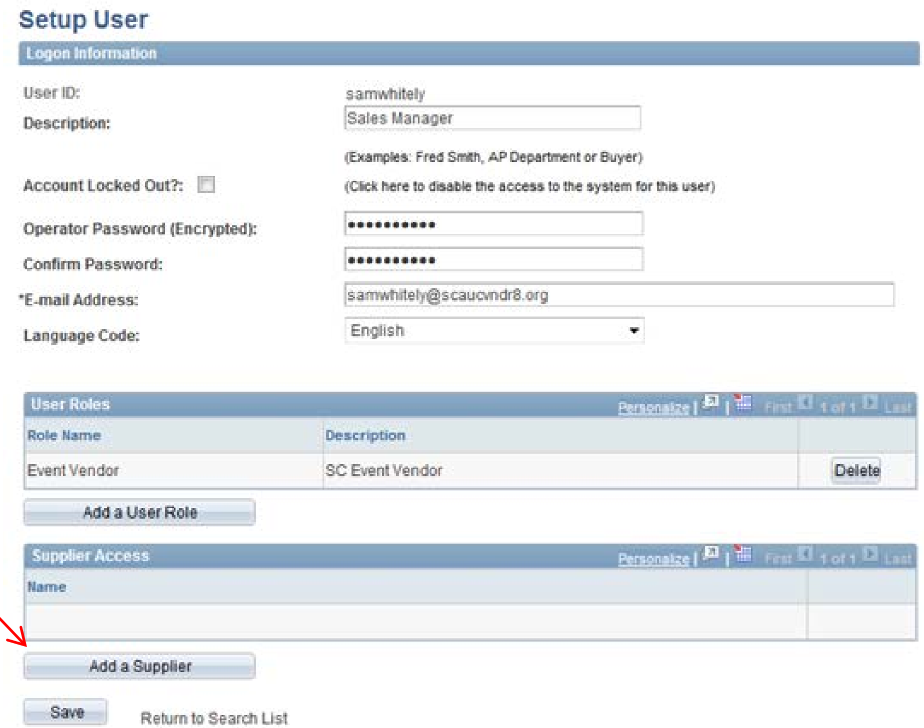
Roles — Personalize | Find | View All | First 1-5 of 5 Last

	Role Name	Description
☐	Event Vendor	SC Event Vendor
☐	SC_eSupplierAddressesContacts	eSupplier Addresses/Contacts:
☐	SC_eSupplierAdmin	eSupplier Administrator
☐	SC_eSupplierUserManageOrders	eSupplier Manage Orders
☐	SC_eSupplierUserReviewPayments	eSupplier Review Payments

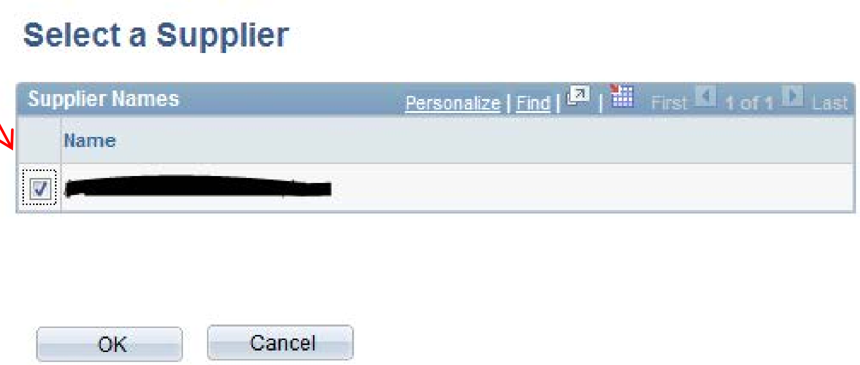
OK Cancel

Add a New User – Part 3

Click "Add a Supplier".



Click check box next to Supplier Name.



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 <u>must</u> select a category (or categories) in order to receive emailed bid notifications.

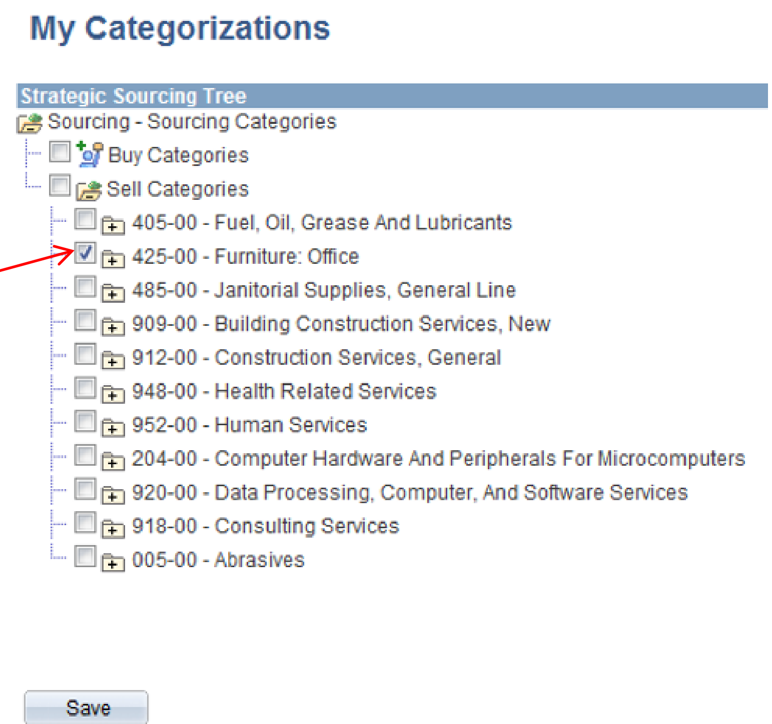
Navigation Path: Main Menu> Manage Events & Place Bids > My Categorizations

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 <u>clicking the parent category may result in more solicitation notifications.</u>

Click “Save”.

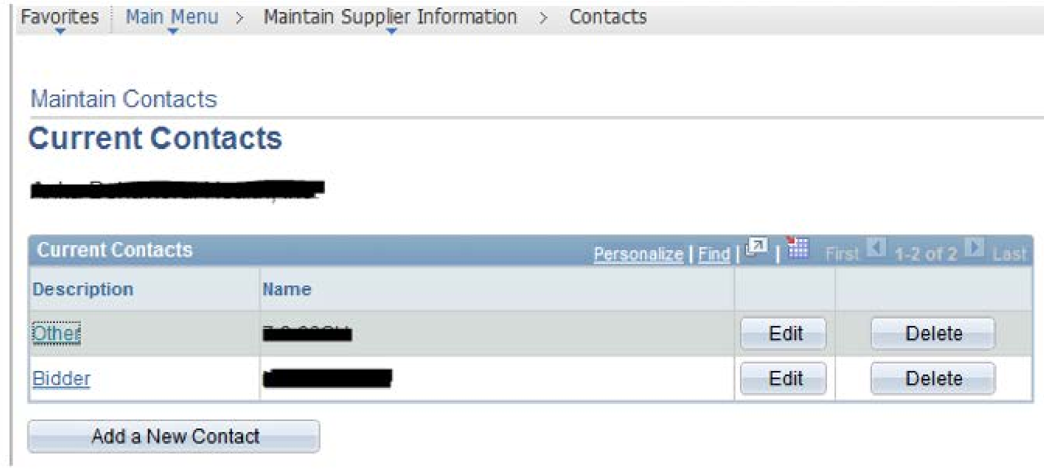


Deleting a Contact

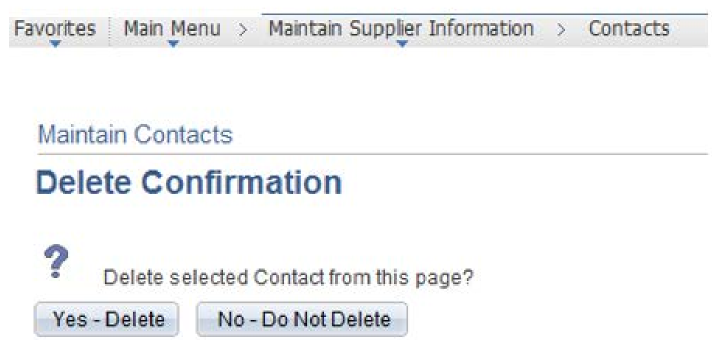
Navigation Path:

Main Menu> Maintain Supplier Information > Contacts

Identify Contact for deletion and click “delete”.



Confirm deletion.



Maintain
Company Addresses

Company addresses are view-only.

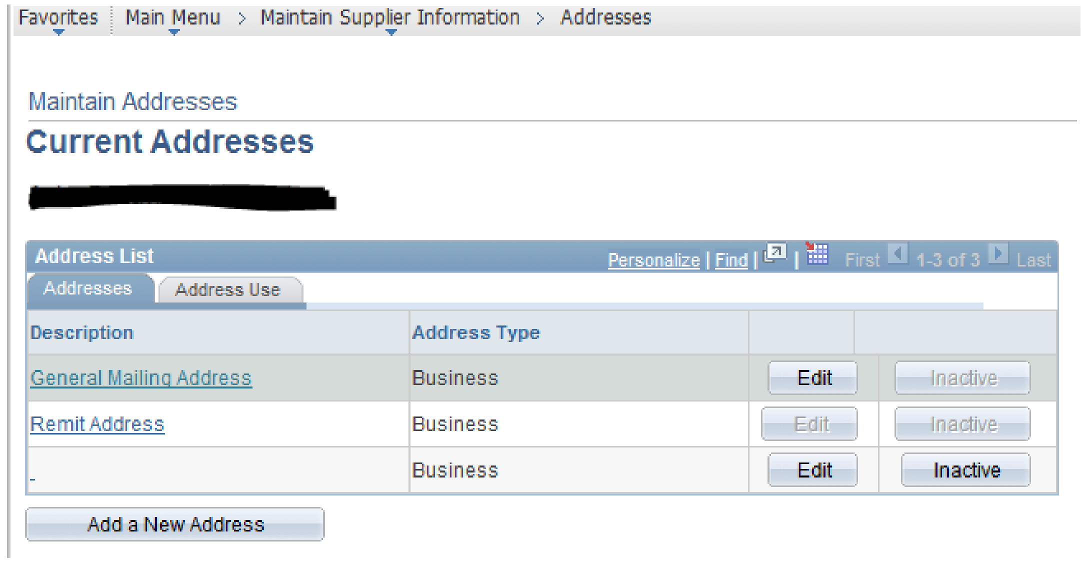
To view addresses, follow navigation path:

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.

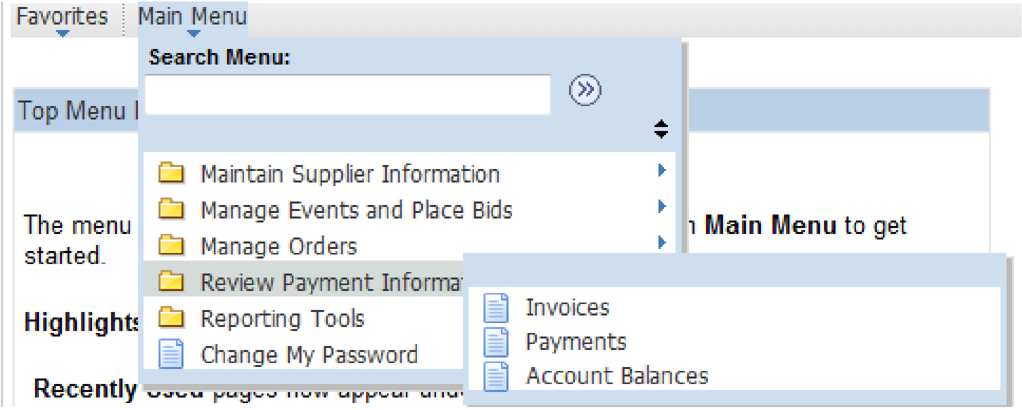


Review Invoices, Payments and Account Balances

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.