

Vendor Account Management Instructions

For Vendors Registered in the Supplier Portal



COUNTY OF
SONOMA

May 15, 2015

Vendor Account Management

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](#)

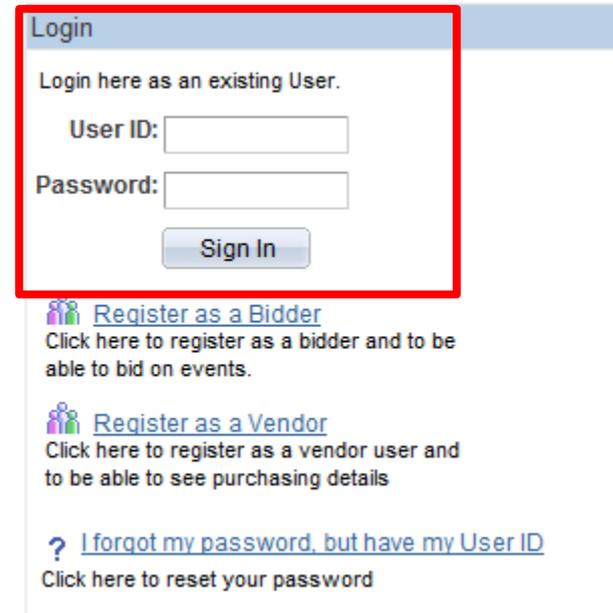
Instructions on how to update & maintain your account continues on the following pages.

Configure Your Account

In order to receive emailed bid notifications, you must complete steps 1-3. The rest of the steps are optional, but will give your account full functionality.

Login to the [Supplier Portal](#) with the User ID and password you selected.

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.



Login

Login here as an existing User.

User ID:

Password:

Sign In

 [Register as a Bidder](#)
Click here to register as a bidder and to be able to bid on events.

 [Register as a Vendor](#)
Click here to register as a vendor user and to be able to see purchasing details

 [I forgot my password, but have my User ID](#)
Click here to reset your password

Step 1:

Maintain Your Company's Contacts

These are people your company designates to confer with the County on bid notifications and questions.

There must be a Primary Contact who is designated to receive emailed bid notifications. You may add additional contacts who may access the system, but only the Primary Contact will get the system-generated emailed bid notifications.

Navigation Path: *Main Menu > Maintain Supplier Information > Contacts*

To edit an existing Contact, select "Edit" next to Contact's name. To add a Contact, select "Add a New Contact."

Favorites Main Menu > Maintain Supplier Information > Contacts

Maintain Contacts

Current Contacts

LMN Inc.

Current Contacts		Personalize	Find	First	1-4 of 4	Last
Description	Name					
Auction Generated Contact 1	Kristin Jones	Edit	Delete			
Sales Rep	Sam Wooten	Edit	Delete			
Sales Manager	Kelli Mathews	Edit	Delete			
Accounting Mgr	Sofia Flores	Edit	Delete			

Add a New Contact

Step 1:

Maintain Your Company's Contacts - *Continued*

To add or update a Contact, enter the following information:

Description - Please use Contact's job title. If this field is already filled in, simply overwrite it.

Name of Contact

Email address for Contact

URL for your company is optional

Location – select Contact's location from dropdown menu.

Role – select most accurate option.

Phone Number with area code – select "add" to list multiple numbers.

Click "Save," then "OK."

Favorites | Main Menu > Maintain Supplier Information > Contacts

Maintain Contacts

Contact Information

LMN Inc.

Description:

Name:

Email ID:

URLID:

Location:

Role:

Status:

Telephone Information Personalize | Find | | | 1 of 1 |

*Type	Prefix	Phone	Ext	
<input type="text" value="Business Phone"/>	<input type="text" value="800"/>	<input type="text" value="555-2368"/>	<input type="text"/>	<input type="button" value="Add"/> <input type="button" value="Delete"/>

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

Step 1:

Maintain Your Company's Contacts - *Continued*

To delete a Contact:

Navigation Path:

Main Menu > Maintain Supplier Information > Contacts

Identify Contact for deletion and click "Delete."

Select "Yes – Delete" to confirm deletion.

Favorites | Main Menu > Maintain Supplier Information > Contacts

Maintain Contacts

Current Contacts

LMN Inc.

Description	Name	Edit	Delete
Auction Generated Contact 1	Kristin Jones	Edit	Delete
Sales Rep	Sam Wooten	Edit	Delete
Sales Manager	Kelli Mathews	Edit	Delete
Accounting Mgr	Sofia Flores	Edit	Delete
Sales Rep	Laura Carmichael	Edit	Delete

[Add a New Contact](#)

Favorites | Main Menu > Maintain Supplier Information > Contacts

Maintain Contacts

Delete Confirmation

? Delete selected Contact from this page?

[Yes - Delete](#) [No - Do Not Delete](#)

Step 2:

Designate a Primary Contact to Receive Emailed Bid Notifications & Updates

There must be a Primary Contact who is designated to receive emailed bid notifications. You may add additional contacts who may access the system, but only the Primary Contact will get the system-generated emailed bid notifications.

To designate the Primary Contact, follow this navigation path: *Main Menu > Manage Events & Place Bids > Maintain My User Contact*. The top image shows Contact #1 is the person who receives bid notifications.

If you want to change the designated Primary Contact, click on the magnifying glass next to the Contact Sequence Number to display all Contacts and their names.

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

Navigation: 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: kjones
Name: Kristin Jones

Company Contacts		*Contact Sequence Number	
LMN Inc.	Vendor	<input type="text" value="1"/>	Kristin Jones

Save

Look Up Contact Sequence Number

Search by: Contact Sequence Number =

Look Up Cancel [Advanced Lookup](#) ? Help

Search Results

View 100 First 1-5 of 5 Last

Contact Sequence Number	Name 1
1	Kristin Jones
2	Sam Wooten
3	Kelli Mathews
5	Sofia Flores
6	Laura Carmichael

Step 3:

Select Your Category Codes

Bid notifications are emailed to the Primary Contact based on the categories selected. **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 directly on the file folder icon next to "Sell Categories." The screen will expand. Use the Control+F command to search the category list by keyword.

Click the check box next to the category you wish to bid on. View subcategories by clicking the file folder next to the top level category. You may register for subcategories rather than a top level category, but selecting the top level category may result in more solicitation notifications. You may choose multiple categories and/or subcategories.

When finished, scroll to bottom and click "Save."

My Categorizations

Strategic Sourcing Tree

- Sourcing - Sourcing Categories
 - Buy Categories
 - Sell Categories

Save

My Categorizations

Strategic Sourcing Tree

- Sourcing - Sourcing Categories
 - Buy Categories
 - Sell Categories
 - 405-00 - Fuel, Oil, Grease And Lubricants
 - 425-00 - Furniture: Office
 - 485-00 - Janitorial Supplies, General Line
 - 909-00 - Building Construction Services, New
 - 912-00 - Construction Services, General
 - 948-00 - Health Related Services
 - 952-00 - Human Services
 - 204-00 - Computer Hardware And Peripherals For Microcomputers
 - 920-00 - Data Processing, Computer, And Software Services
 - 918-00 - Consulting Services
 - 005-00 - Abrasives

Save

Step 4:

Add a User

Users are people in your company who can login, bid, and view account information. You may have multiple Users on your account. **Note:** if you are adding a new user and want them to be the designated Primary Contact, complete Step #2 after adding the new user.

Navigation Path: *Main Menu > Maintain Supplier Information > User Profiles*

At the Security page, click the grey “Add a New Value” tab, then type in desired new User ID (login name) and click “Add.”

Enter the following:

Description: Use job title.

Password: Must be at least 8 characters. The following special characters may be used:
! @ # \$ % ^ & * () - = + \ | [] { } ; : / ? . > <

Confirm Password: Re-enter password, and save User’s UserID and password.

Email: Enter User’s email.

Click “Add a User Role” and continue on the next page.

Favorites | Main Menu > Maintain Supplier Information > User Profiles

Setup User

Logon Information

User ID: lauracarmichael
Description: Sales Rep
(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: laura.carmichael@lmncorp.com

Language Code: English

User Roles Personalize | 1 of 1 | First | Last

Role Name	Description
Add a User Role	

Supplier Access Personalize | 1 of 1 | First | Last

Name
Add a Supplier

Save Return to Search List

* Required Field

Step 4:

Add a User - *Continued*

Select one or more 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 can create, update, and assign roles to other users.

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."

Favorites Main Menu > Maintain Supplier Information > User Profiles

Select Roles

Roles		Personalize Find View All First 1-5 of 5 Last
Role Name	Description	
<input checked="" type="checkbox"/> Event Vendor	SC Event Vendor	
<input checked="" type="checkbox"/> SC_eSupplierAddressesContacts	eSupplier Addresses/Contacts:	
<input checked="" type="checkbox"/> SC_eSupplierAdmin	eSupplier Administrator	
<input checked="" type="checkbox"/> SC_eSupplierUserManageOrders	eSupplier Manage Orders	
<input checked="" type="checkbox"/> SC_eSupplierUserReviewPayments	eSupplier Review Payments	

OK

Cancel

Step 4:

Add a User – Continued

To associate the new User with your company, click “Add a Supplier.”

Click check box next to Supplier Name.

Click “OK.”

Click “Save” on the next screen.

Favorites | Main Menu > Maintain Supplier Information > User Profiles

Setup User

Logon Information

User ID: lauracarmichael
Description: Sales Rep
(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: laura.carmichael@lmn.corp
Language Code: English

User Roles Personalize | First 1-5 of 5 Last

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

Add a User Role

Supplier Access Personalize | First 1 of 1 Last

Name

Add a Supplier

Select a Supplier

Supplier Names Personalize | Find | First 1 of 1 Last

Name
<input checked="" type="checkbox"/> Tiger Natural Gas, Inc. / Tiger, Inc.

OK Cancel

Step 5:

Locking a User out of Your Account

At this time, Users can be locked out of accounts, but not deleted.

To lock out a User, please send an email request to efs-vendor-desk@sonoma-county.org.

Include your Vendor ID number, the User ID to be locked out, and your title and contact information.

 Send	To...	<input type="checkbox"/> <u>efs-vendor-desk@sonoma-county.org</u>
	Cc...	
	Bcc...	
	Subject	Please lock user out of vendor account

Step 6:

View and Change 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 and 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 addresses, all of type "Business". Each row has "Edit" and "Inactive" buttons. 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"/>

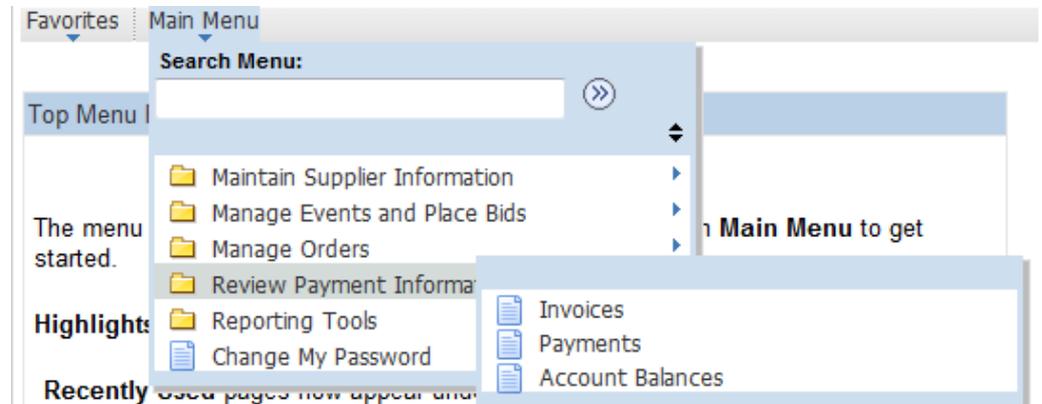
Step 7:

View Invoices, Payments, and Account Balances

Navigation Path:

*Main Menu > Review Payment
Information*

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



Step 8:

View Purchase Orders, 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.

