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

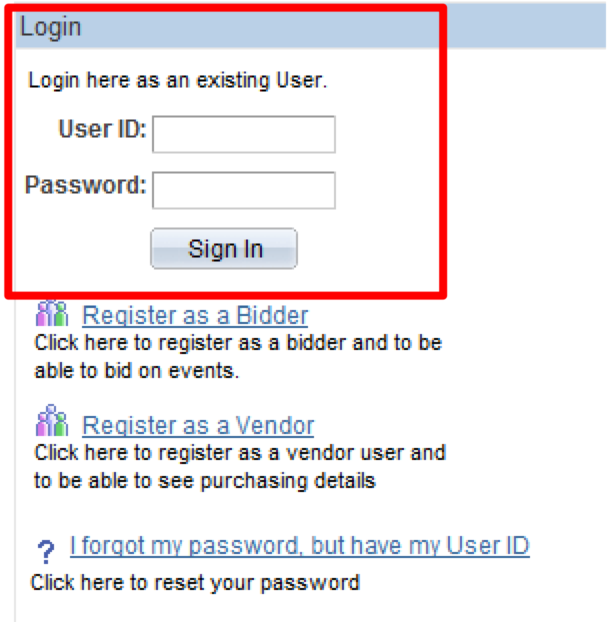
Instructions on how to update & maintain your account continues on the following pages.

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.



Step 1:

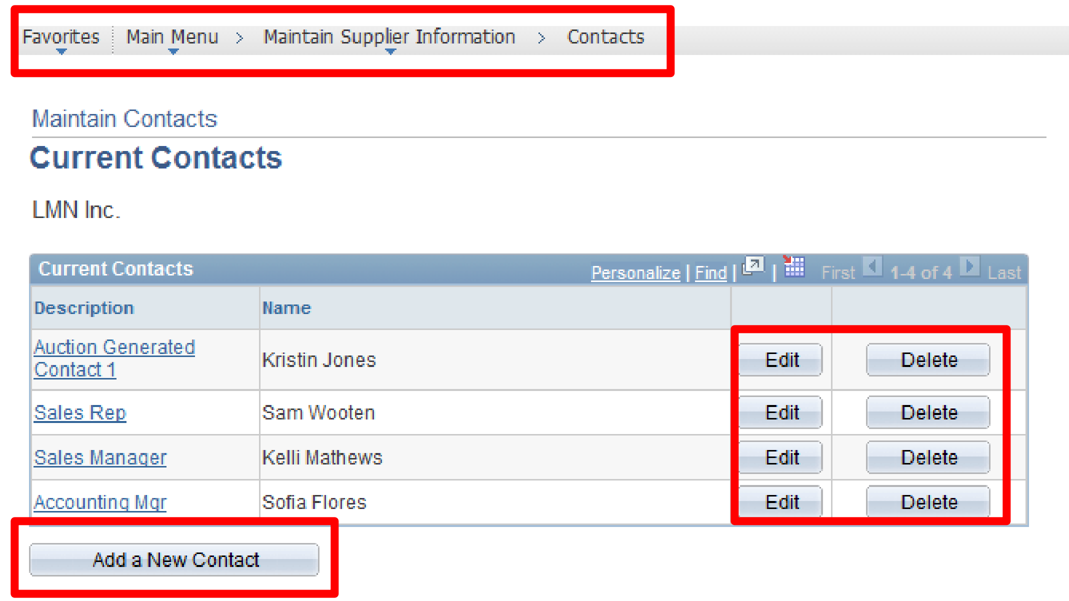
Maintain Your Company's Contacts

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."



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

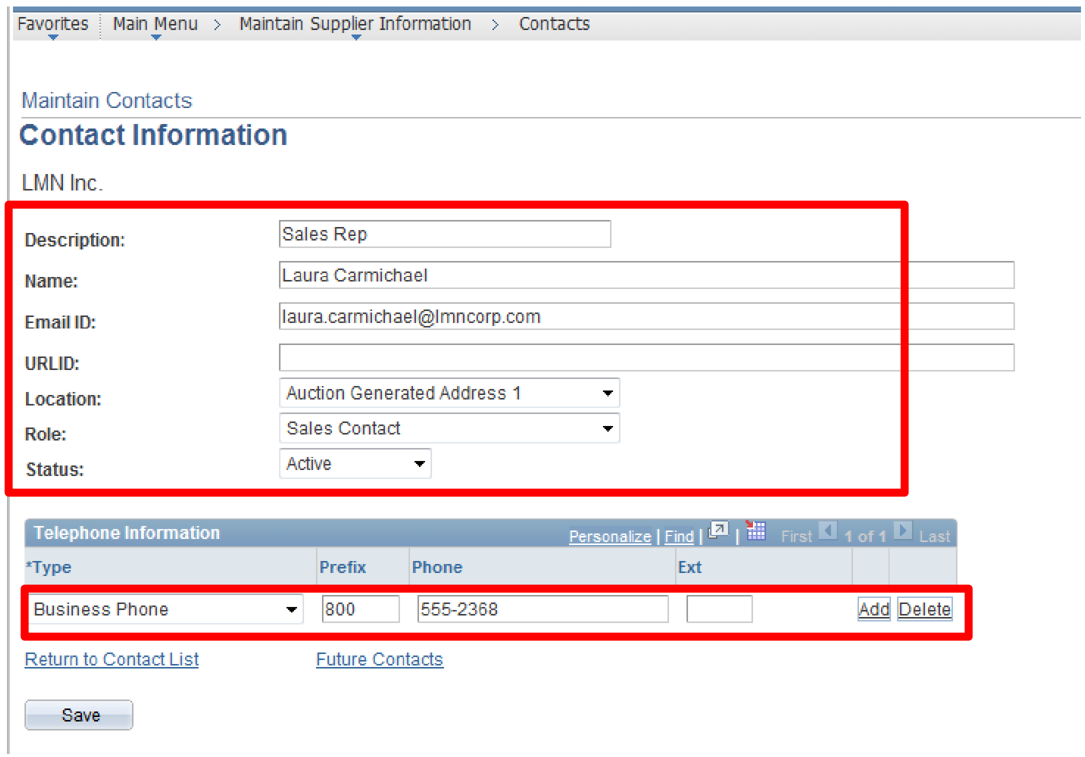
URL for your company is optional

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."



Step 1:

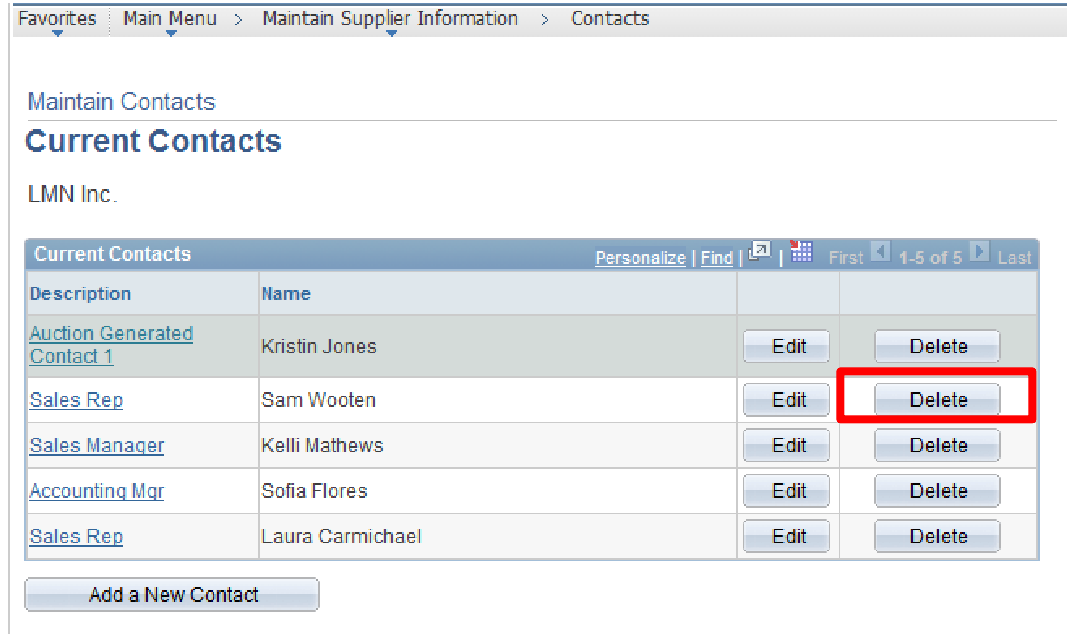
Maintain Your Company's Contacts - *Continued*

To delete a Contact:

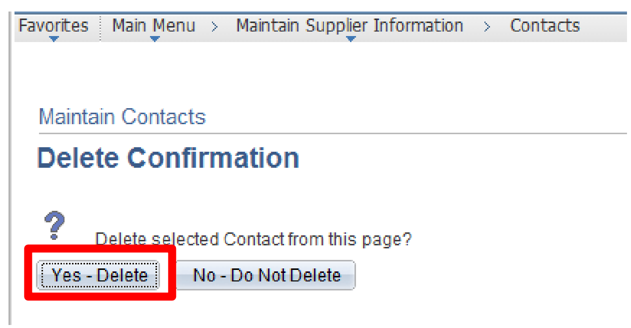
Navigation Path:

Main Menu > Maintain Supplier Information > Contacts

Identify Contact for deletion and click "Delete."



Select "Yes – Delete" to confirm deletion.



Step 2:

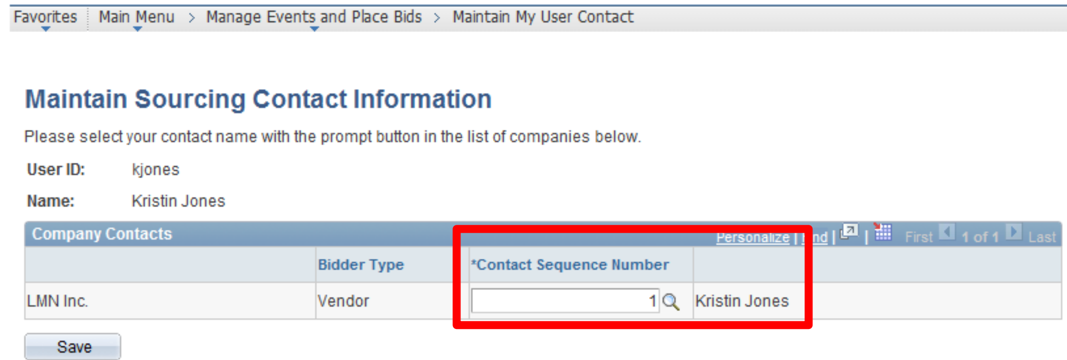
Designate a Primary Contact to Receive Emailed Bid Notifications & Updates

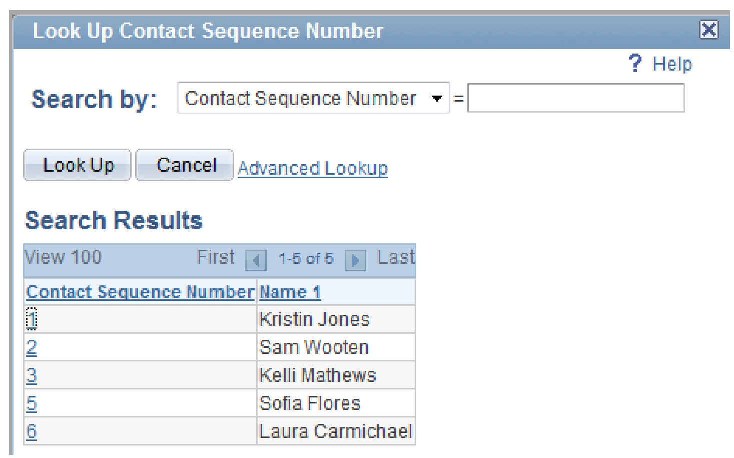
There must be a Primary Contact who is designated to receive emailed bid notifications. You may add additional contacts who may access the system, but only the Primary Contact will get the system-generated emailed bid notifications.

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.”





Step 3:

Select Your Category Codes

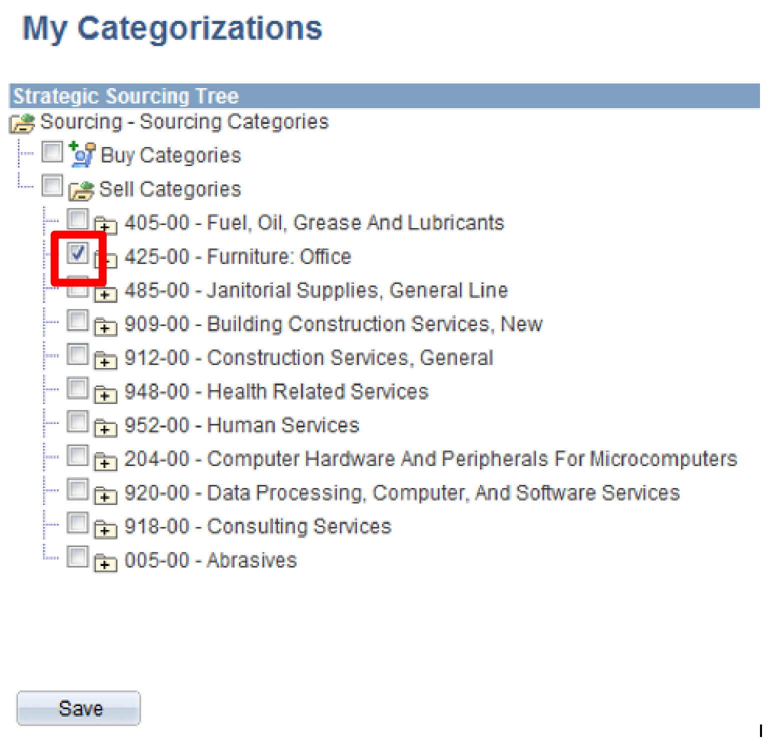
Bid notifications are emailed to the Primary Contact based on the categories selected. **Vendors must select a category (or categories) in order to receive emailed bid notifications.**

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."



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:

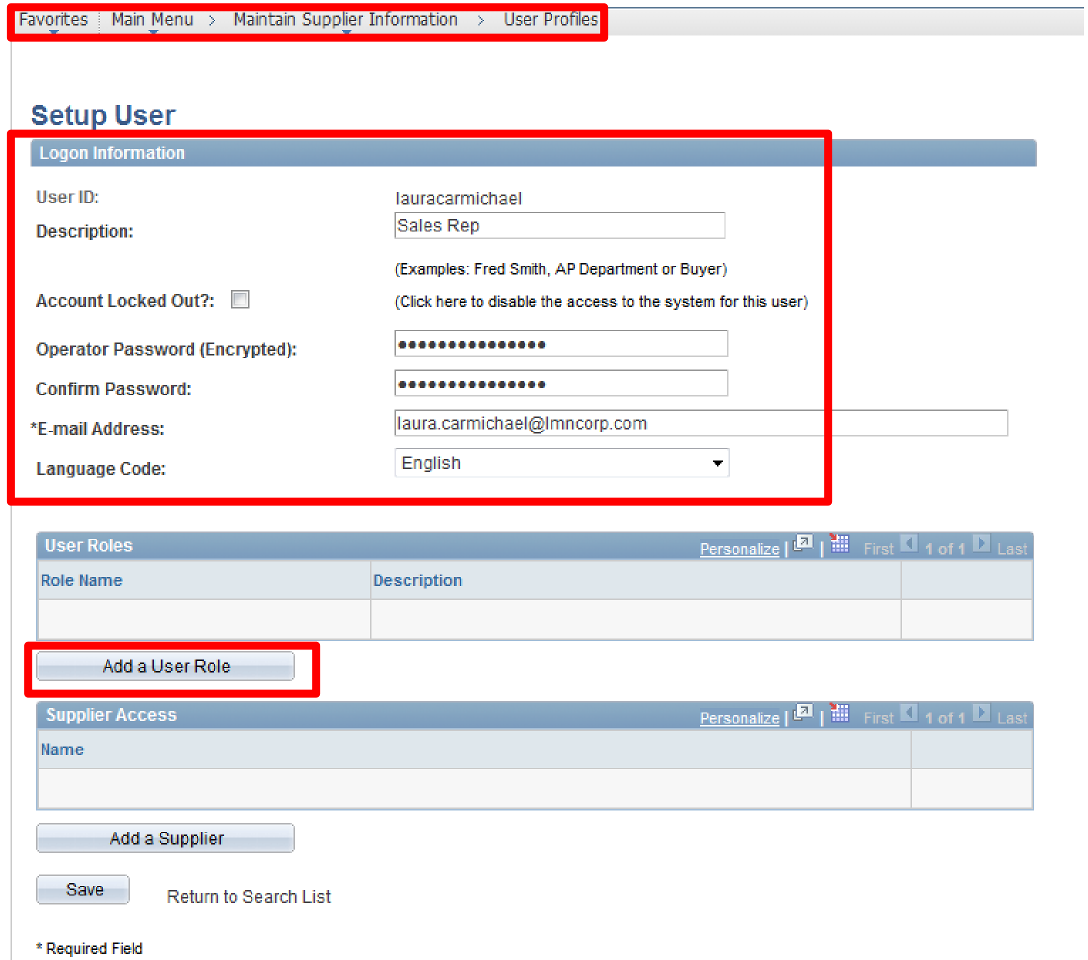
Description: Use job title.

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.



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.

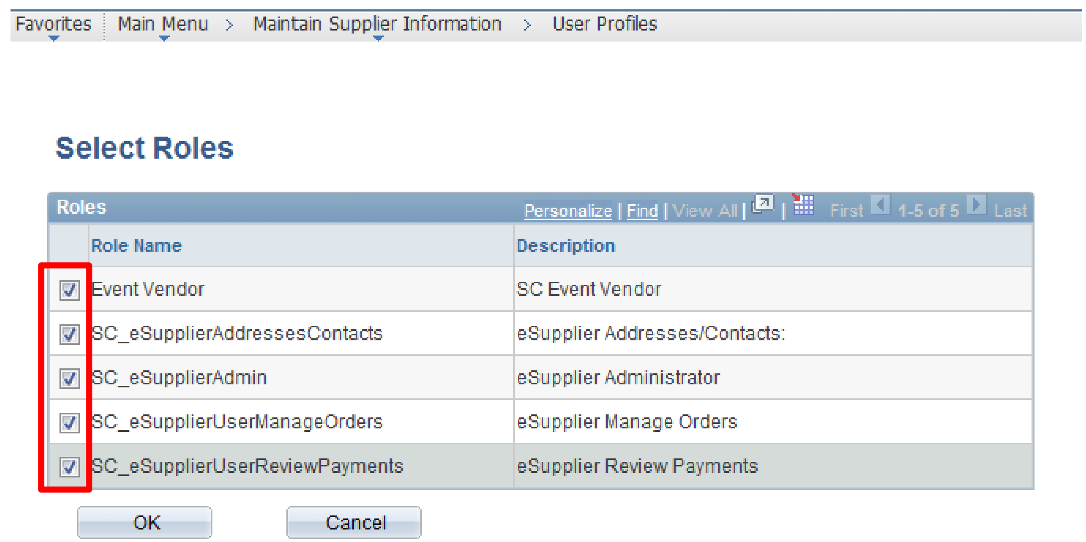
SC_eSupplierAddressesContacts
User can add Contacts to account.

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.

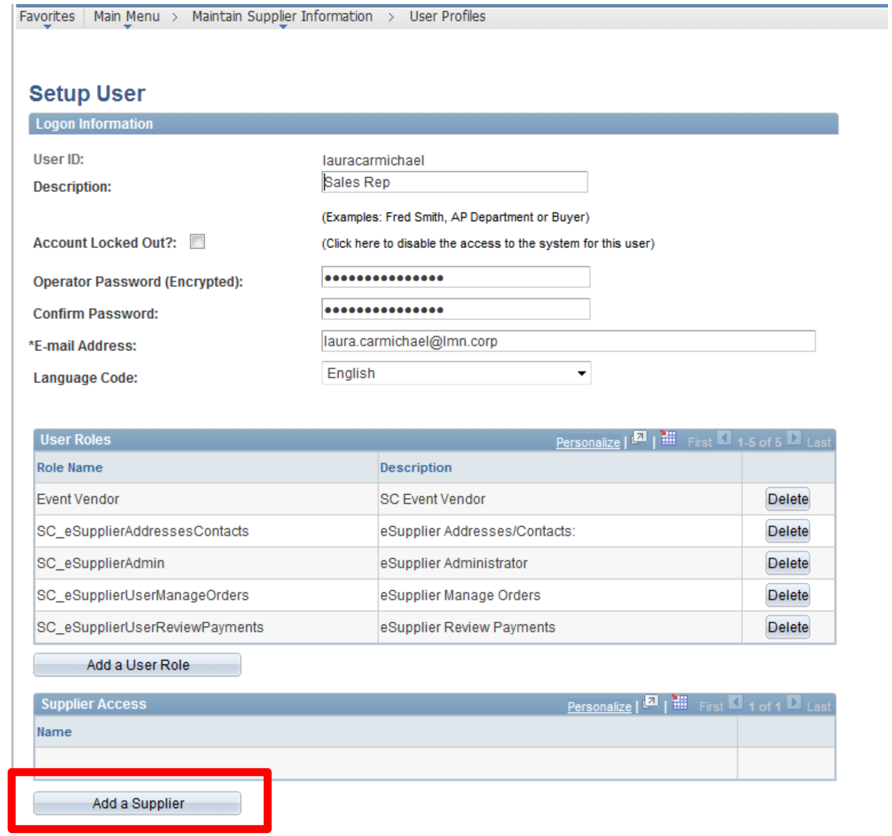
SC_eSupplierUserReviewPayments
User can review invoices, payments, and account balances.

Click “OK.”

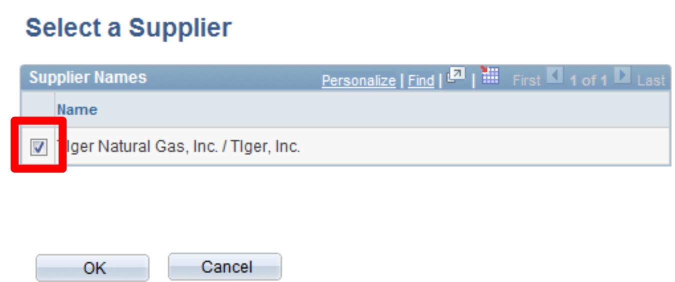


Step 4:

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.

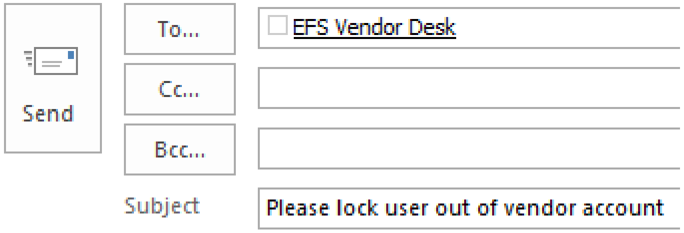
Step 5:

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.



Step 6:

View and Change Company Addresses

Company addresses are view-only.

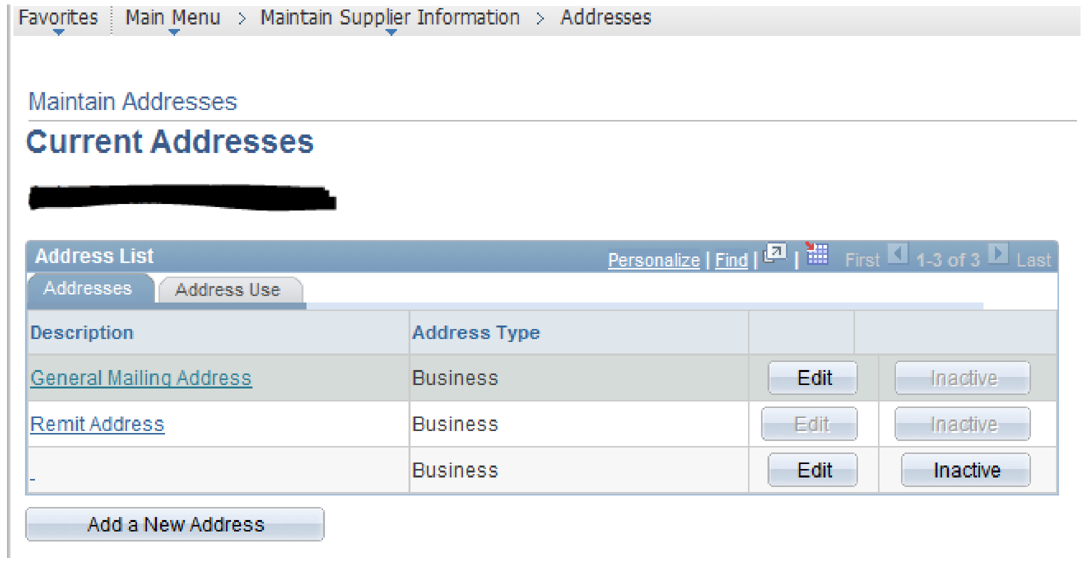
To view addresses, follow navigation path:

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.



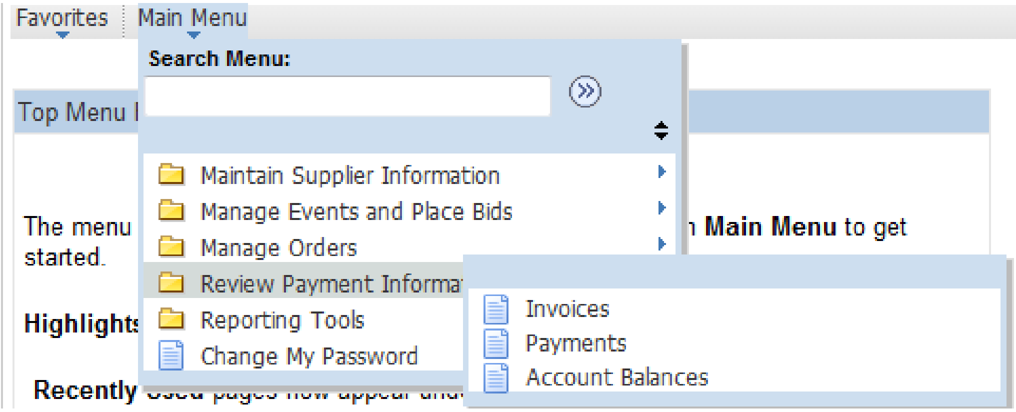
Step 7:

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.