

# Vendor Registration Instructions

For First-time Registrants in the Supplier Portal



COUNTY OF  
**SONOMA**

May 15, 2015

# Who is a Vendor?

A Vendor is a company or individual who has previously sold goods and/or services to the County of Sonoma.

**Vendors must register in the Supplier Portal in order to receive bid notifications and place bids.**

[Click here to register in the Supplier Portal](#)

Registration instructions continue on the following pages.

## Supplier Portal Login Screen

Vendors must have their County assigned Vendor ID number at time of registration, as well as their Taxpayer Identification Number or Social Security Number.

If you do not have your Vendor ID number available, contact the County department you normally work with, as they should be able to look it up for you. You can also email a request to [efs-vendor-desk@sonoma-county.org](mailto:efs-vendor-desk@sonoma-county.org).

Click the “Register as a Vendor” link.

County of Sonoma  
EFS  
Supplier Portal [ FNPRD ]


Favorites Main Menu


### Login


Login here as an existing User.

User ID:

Password:

 [Register as a Bidder](#)  
Please click here if you are a prospective Supplier needing access to bidding functionality

 [Register as a Vendor](#)  
Please click here if you are already an active Vendor and want to register as a Supplier Portal user

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

# IMPORTANT: Navigation Information

Use links and buttons to navigate. Do not use the BACK button on your browser. If you are in the middle of a transaction and use the BACK button on your browser, the transaction will not process.

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 | First 1 of 1 Last

*Type	Prefix	Phone	Ext		
Business Phone	<input type="text"/>	<input type="text"/>	<input type="text"/>	<a href="#">Add</a>	<a href="#">Delete</a>

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

\* Required Field

# Supplier Registration

**Code:** Enter “SCREGISTER”. This is case-sensitive, no spaces. Do not enter quotation marks.

**User ID:** Create a login name without spaces.

**Description:** Enter your job title.

**Email ID:** Enter desired email address.

**Password:** Create a password with a minimum of 8 characters. You may use the following special characters:  
! @ # \$ % ^ & \* ( ) - = + \ [ ] { } ; : / ? . > <

**Confirm:** Re-type password. Save your UserID and password.

**Currency:** Select USD.

**Vendor ID:** Enter your Vendor ID# supplied by the County.

**ID Number:** Enter Tax Identification Number (TIN) or Social Security Number (SSN). Use numbers only; no dashes or other characters. This must match the TIN or SSN assigned to this Vendor in County records.

Select “Create.”

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

## Supplier Registration

Fill in the following information and click on the Create button to create a Supplier account. In order to self register you must have received a predefined code and know your corresponding vendor id.

Code:

\*User ID:  Description:

\*Email ID:

Password:

Confirm:

Language:  Currency:

Vendor List		Personalize	Find	View All	First	1 of 1	Last
Vendor ID▲	ID Number▲						
<input type="text"/>	<input type="text"/>						

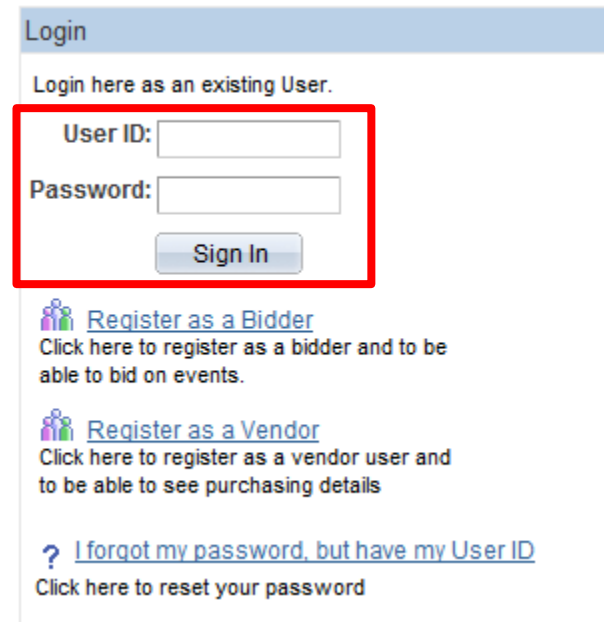
**Create**

# 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.




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.

Description	Name		
<a href="#">Auction Generated Contact 1</a>	Kristin Jones	Edit	Delete
<a href="#">Sales Rep</a>	Sam Wooten	Edit	Delete
<a href="#">Sales Manager</a>	Kelli Mathews	Edit	Delete
<a href="#">Accounting Mgr</a>	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: Sales Rep

Name: Laura Carmichael

Email ID: laura.carmichael@lmncorp.com

URLID:

Location: Auction Generated Address 1

Role: Sales Contact

Status: Active

Telephone Information

*Type	Prefix	Phone	Ext	
Business Phone	800	555-2368		<a href="#">Add</a> <a href="#">Delete</a>

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

Save



## 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
<a href="#">Auction Generated Contact 1</a>	Kristin Jones	Edit	Delete
<a href="#">Sales Rep</a>	Sam Wooten	Edit	Delete
<a href="#">Sales Manager</a>	Kelli Mathews	Edit	Delete
<a href="#">Accounting Mgr</a>	Sofia Flores	Edit	Delete
<a href="#">Sales Rep</a>	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](#)

#### 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 five digit 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:

### Lock 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](mailto: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"/> <a href="#">EFS Vendor Desk</a>
	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](mailto: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**, followed by a sub-header **Current Addresses**. A blacked-out redaction bar is present below the sub-header. The main content area features an **Address List** table with two tabs: **Addresses** (selected) and **Address Use**. The table has columns for **Description**, **Address Type**, and two columns for actions: **Edit** and **Inactive**. The table contains three rows of data:

Description	Address Type	Edit	Inactive
<a href="#">General Mailing Address</a>	Business	Edit	Inactive
<a href="#">Remit Address</a>	Business	Edit	Inactive
-	Business	Edit	Inactive

Below the table is a button labeled **Add a New Address**. The top right of the table area includes navigation controls: **Personalize** | **Find** | **First** | **1-3 of 3** | **Last**.



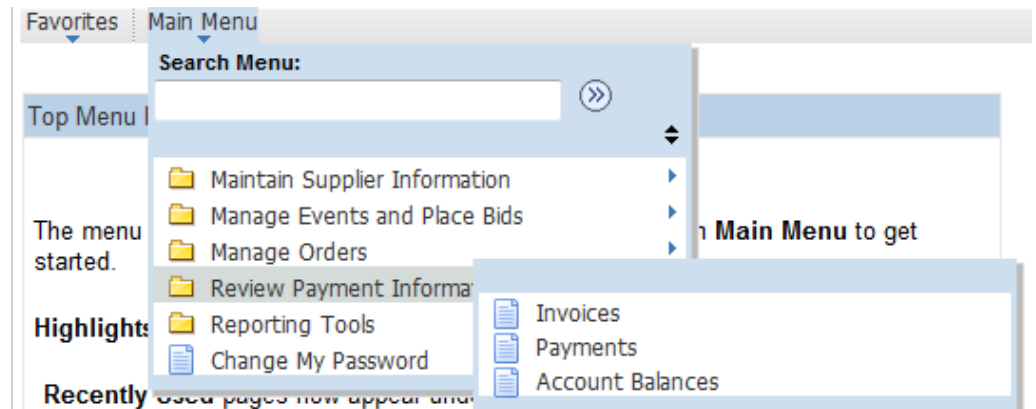
## Step 7:

### 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 search for desired information.

