



SUPPLIER ACCOUNT MANAGEMENT INSTRUCTIONS

County of Sonoma Supplier Portal






County of Sonoma Suppliers are responsible for self-managing and updating their account information online. Regularly check and update your account to ensure uninterrupted access to information regarding the County of Sonoma’s solicitations. This instructional document provides instructions on accessing and updating your Supplier Account. You can navigate to a particular topic by selecting the topic from the table of contents.

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Signing in to the Supplier Portal

Navigate to the Sonoma County [Supplier Portal](#) and sign in using your User ID and password. If you do not remember your User ID, email our [Supplier Desk](#) for assistance. If you have your User ID but forgot your password, please click “[Forgot Password?](#)” to reset.

 <p>Sonoma County Portal</p> <p>Welcome to the Sonoma County Supplier Portal. This site is best viewed with Microsoft Edge or Google Chrome. You may need to disable your internet browser's pop-up blocker to fully access this website.</p> <p>The County only accepts electronic bids submitted through the Supplier Portal. Hard copy, faxed, and/or emailed submissions will not be accepted.</p> <p>Registration is required in order to view bid documents, receive bid alerts and addenda, and bid on County solicitations; instructions and additional support are available in FAQ section below.</p> <p>System may be temporarily unavailable for maintenance: Tuesdays 6:00-7:30am and Thursdays 5:30-7:30pm.</p> <p>Effective July 1, 2023, the living wage rate required under the County's Living Wage Ordinance (LWO) shall be \$17.65 per hour, an increase over the previous \$17.25 per hour. The adjustment was adopted by the County's Board of Supervisors on March 21, 2023, in accordance with Sonoma County Municipal Code section 2-377(d). All covered employees must be paid at least the current living wage rate. Questions? Email livingwage@sonoma-county.org.</p>	<p>Sign In</p> 	<p>User Registration</p>  <p>View Registration Options.</p>
<p>Bidding Opportunities</p>  <p>01 Opportunities</p>	<p>Executive Order N-6-22</p>  <p>Required Compliance</p>	

Sign In ×

User ID

Password


Enable Screen Reader Mode

Sign In

Forgot Password?

Navigating the Supplier Portal to Complete/Update User Profile

In order to complete your User Profile configurations, select the tile that states [Click Here to Begin](#).

<p style="text-align: center; margin: 0;">Instructional Documents</p> <p style="margin: 0;"> How to View a Solicitation and Submit a Bid Supplier Account Management Instructions </p> <p style="font-size: small; margin: 10px 0 0 0;"> To view the documents linked above, you must have Adobe Reader, or comparable application, to view PDF's. Additional instructions can be found in the FAQs section of this portal. Click the "Click Here to Begin" tile on the right to access. Please email supplier-desk@sonoma-county.org if you experience difficulties using this site. </p>	<p style="margin: 0;">Click Here to Begin</p> 
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Selecting or Updating Categories

The County will email solicitation notifications to Suppliers who have registered for the same commodity or service category as the solicitation. **In order to receive emailed solicitation notifications, you must select one or more categories, and the email address you supplied must be correct.**

In the left navigation pane, select [Maintain User Account](#), which will expand the folder. Then select [My Categorizations](#).

< Sonoma County Supplier Portal

Bidding Activities

View Events and Place Bids

Maintain User Account

Manage User Profiles

Manage Supplier Addresses

Manage Supplier Contacts

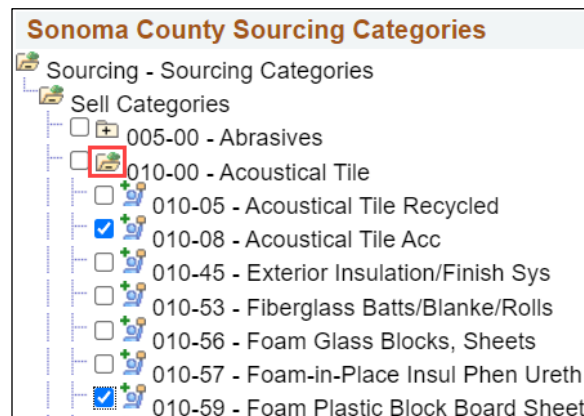
Maintain My User Contact

My Categorizations

Click directly on the **file folder**  next to **Sell Categories**.

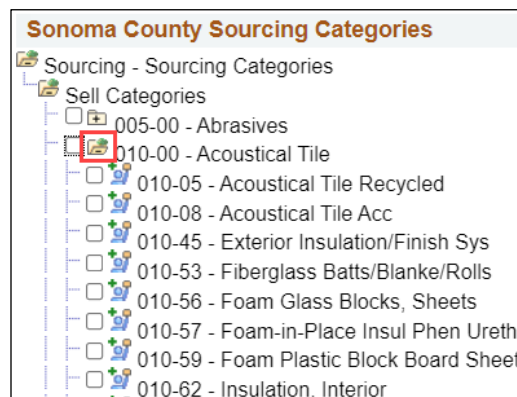


Search for the category list for goods and/or services your organization provides. Scroll, or use the Control+F command to search by keyword. When you have identified a category, click on the **file folder** next to the **category name** to view the subcategories. Check as many categories and/or subcategories as necessary. **When finished, scroll to the bottom and click Save.** Please note that it may take several minutes to save your progress if many categories are selected.



Save

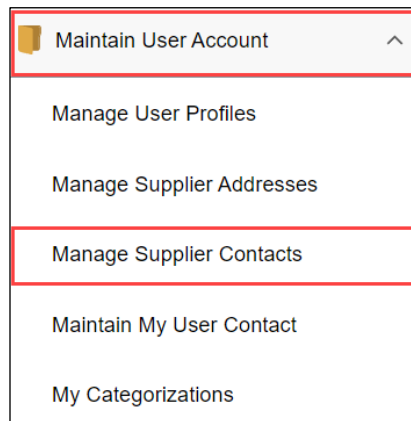
To select all subcategories, first expand the file folder for the category, and then select the checkbox next to the category. All subcategories will be checked.



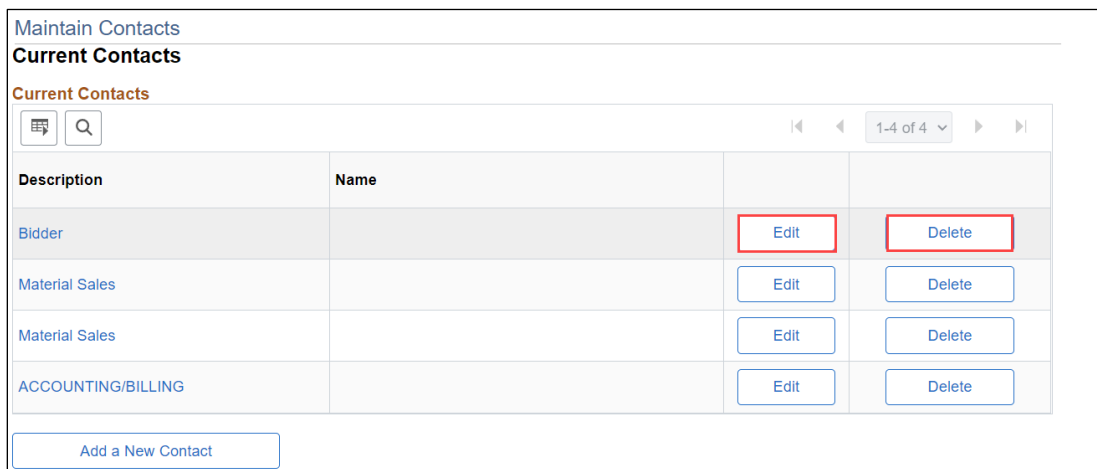


Editing or Adding Contacts

Contacts are designated employees of your organization that the County can confer with on business issues. On the left panel menu, select **Maintain User Account** and then select **Contacts**. You can edit or add new contacts in this section.



To Edit an existing contact, select the **Edit** button adjacent to the contact you wish to change and/or make sure all the information is correct. To Delete an existing contact, select the **Delete** button.



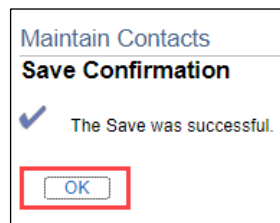
Click **Add a New Contact** to add additional Contacts to your account.



Adding or editing contacts will bring up the Contact Information screen where the information can be entered. Complete all fields, entering the contact's job title in the **Description** field. If this field is already filled in, please overwrite it. Click **Save** when finished.

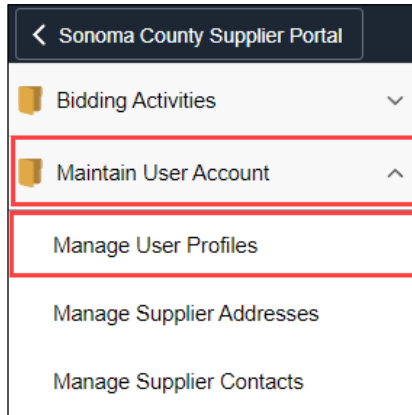
The screenshot displays the "Supplier Contacts" interface. The main section is titled "Maintain Contacts" and "Contact Information". It contains several input fields: "Description" (Bidder), "Name" (Jane Doe), "Email ID" (Jane.Doe@example.com), "URLID" (http://), "Location" (General Mailing Address), "Role" (Executive Management), and "Status" (Active). Below this is the "Telephone Information" section, which includes a table with columns for "Type", "Prefix", "Phone", and "Ext". The table has one row with "Business Phone", "707", "555-1234", and an empty "Ext" field. There are "Add" and "Delete" buttons next to the row. At the bottom left, there are links for "Return to Contact List" and "Future Contacts". A "Save" button is highlighted with a red rectangular border.

You will receive an onscreen confirmation when a contact is successfully saved. To add or update more contacts, select **OK** and repeat the process.

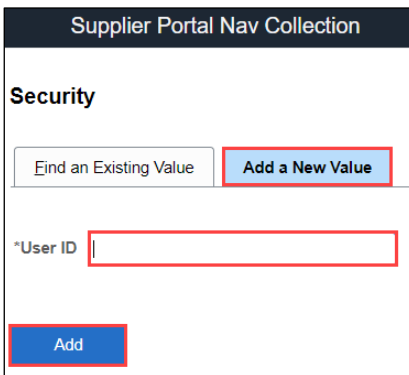


Adding New Users for Your Company

Users are people in your company who can login to and use the account. You can select specific permissions for each User, or give everyone the same permissions. In the left navigation pane select **Maintain User Account** then select **Manage User Profiles**.



Click on the **Add a New Value** tab, enter a User ID (login name) for the new User and click **Add**.

A screenshot of the Supplier Portal Nav Collection Security screen. The screen has a dark header with the text 'Supplier Portal Nav Collection'. Below the header, the word 'Security' is displayed. There are two tabs: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' tab is selected and highlighted with a red box. Below the tabs, there is a text input field labeled '*User ID' with a red border. At the bottom of the screen, there is a blue 'Add' button highlighted with a red box.

Enter User information in the Setup User screen:

Description - Enter User's job title.

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

Confirm Password - Retype password.

Email Address - Enter email address of new User.

Setup User

Lagon Information

User ID

Description
 (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

Language Code

User Role - By default, all new users will be given a role of Event Vendor. This role allows bidding on solicitations, and is required for use of the supplier portal. Additional roles can be added by selecting [Add a User Role](#).

User Roles

1-1 of 1

Role Name	Description	
Event Vendor	SC Event Vendor	<input type="button" value="Delete"/>

Select one or more roles by checking the box next to the role – role descriptions and permissions are as follows – select **OK** when finished:

- SC_eSupplier/Addresses/Contacts – User can add Contacts to the account.
- SC_eSupplierAdmin – User can create, update, and assign roles to other users.
- SC_eSupplierUserManageOrders – User can review Purchase Orders, Order Summaries, and Receipts.
- SC_eSupplierUserReviewPayments – User can review invoices, payments, and account balances.

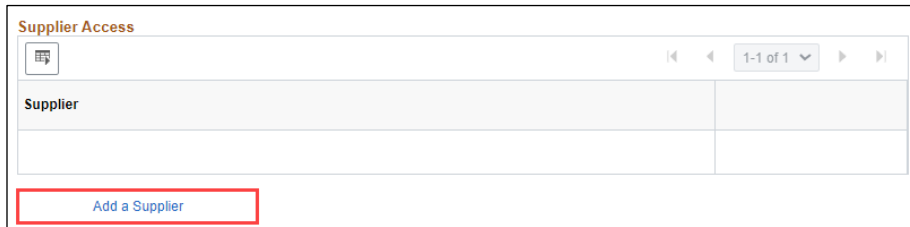
Select Roles

Roles

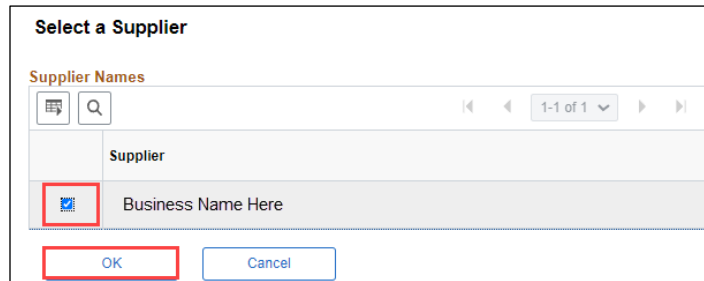
1-4 of 4 | View All

	Role Name	Description
<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

Click Add a Supplier.



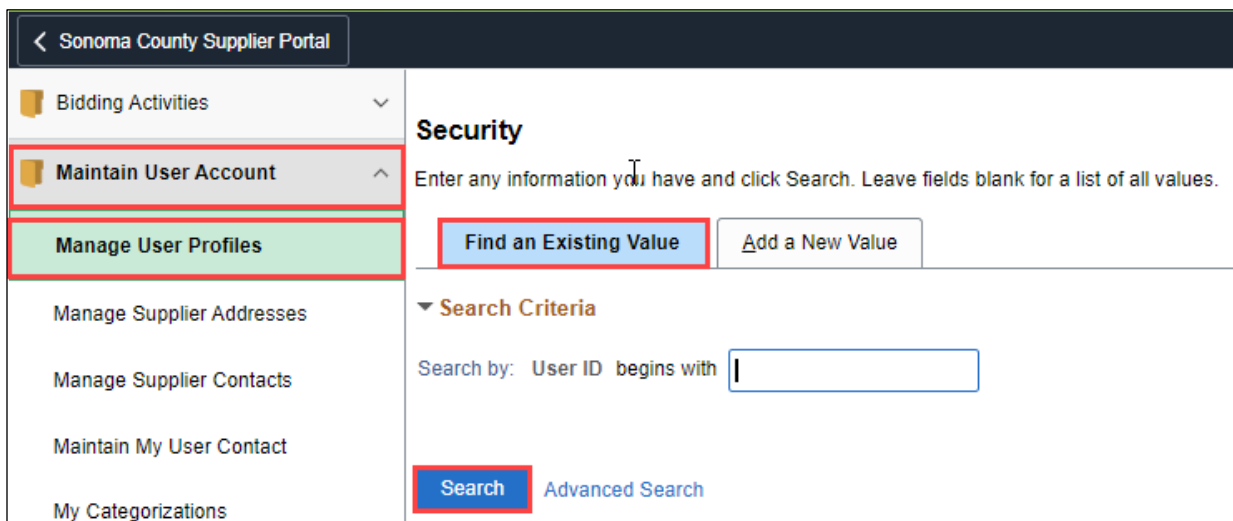
Click the check box next to Supplier Name, then click **OK**. Click **Save** on the next screen.



Locking Out a User

Users can be locked out and unable to access accounts, but not removed. To lock out a User, send an email request to our [Supplier Desk](#). Include your Supplier ID number, company name, the User ID to be locked out, and your title and contact information.

Alternatively, Supplier account managers can lock out as User by navigating to [Maintain User Account](#), and selecting [Manager User Profiles](#). The window defaults to the Find an Existing Value tab – select [Search](#) to see all Users associated with the account.



Select the **User ID** for the profile to be locked.

Search Results	
View All << < > >>	
User ID	Description
Fiscal	Fiscal

Check the box for “**Account Locked Out?**” to lock the account.

Setup User

Logon Information

User ID: Fiscal

Description: Fiscal

(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):

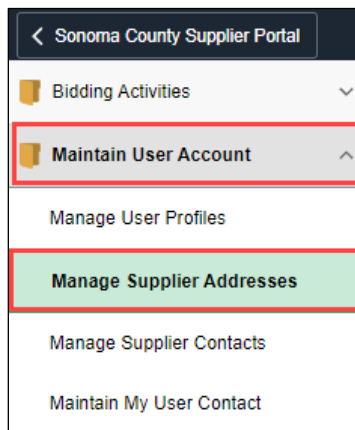
Confirm Password:

*E-mail Address:

Language Code: English

Viewing and Changing Company Addresses

To view addresses, use the left navigation pane and go to **Maintain User Account** then select **Manage Supplier Addresses**.



Click the link in the description column to see the address information for that entry.

The screenshot shows a web interface titled "Maintain Addresses" with a sub-section "Current Addresses". Below this is an "Address List" section containing a search icon and a table. The table has two columns: "Description" and "Address Type". One row is visible with "General Mailing Address" in the description column and "Business" in the address type column. The "General Mailing Address" text is highlighted with a red box.

Description	Address Type
General Mailing Address	Business

Note: Addresses on the portal are view-only. All address changes must be made by the County. To change your company’s address, email our [Supplier Desk](#) with your request and include the following information:

- Supplier ID number
- New Address
- New Telephone Number
- Date change will take effect
- If you have multiple addresses, please specify which should be used for remitting, invoicing, and general mailing.

Viewing Invoices, Payments, and Account Balances

In the left navigation pane, click **POs, Invoices and Payments** to open the folder. From this menu, select Review Purchase Orders, View Supplier Invoices, Review Supplier Payments, or Account Balances and search for desired information.

