









# SUPPLIER REGISTRATION INSTRUCTIONS

## County of Sonoma Supplier Portal

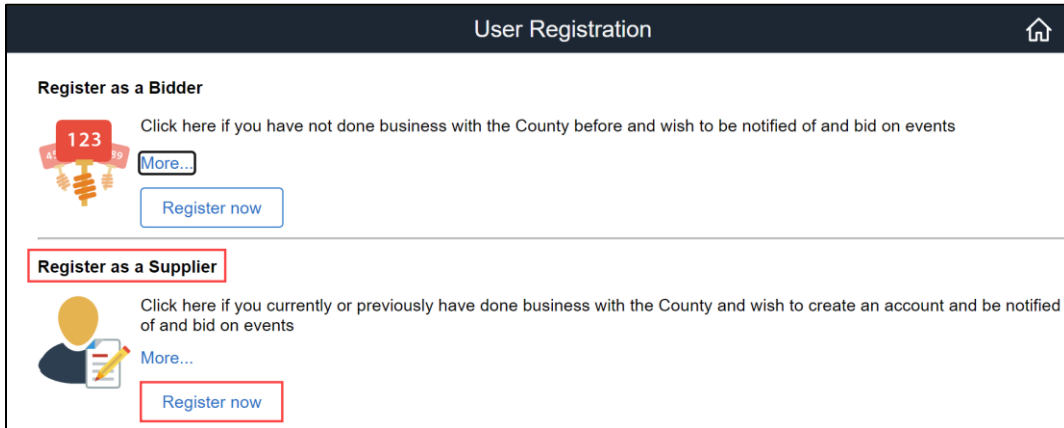
Register as a **Supplier** if your company previously received payment from the County of Sonoma for goods and/or services. If your company has not previously done business with the County, register as a **Bidder**.

If you experience technical issues during registration, email the [Supplier Desk](#) for prompt assistance. Please include screen captures of the issue if possible.

Navigate to the Sonoma County [Supplier Portal](#) and click on **User Registration**.

 <p><b>Sonoma County Portal</b></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>The living wage rate required under County's Living Wage Ordinance (LWO) has been increased. Effective January 1, 2022, the living wage rate required under the LWO shall be <b>\$16.75</b> per hour, an increase over the previous \$15.00 per hour. The adjustment was adopted by the County's Board of Supervisors on December 14, 2021, in accordance with Sonoma Municipal Code section 2-377(d). All covered employees must be paid at least the increased living wage rate. Questions? Email <a href="mailto:livingwage@sonoma-county.org">livingwage@sonoma-county.org</a>.</p>	<p><b>Sign In</b></p> 	<p><b>User Registration</b></p>  <p>View Registration Options.</p>
<p><b>FAQs   Contact Us</b></p>  <p>Get helpful information here.</p>	<p><b>Bidding Opportunities</b></p>  <p>02 Opportunities</p> <p><b>Executive Order N-6-22</b></p>  <p>Required Compliance</p>	
<p><b>Legal</b></p> <p>You are logging into a system that is the property of the County of Sonoma and is for authorized use only. Users have no explicit or implicit expectation of privacy. Any and all uses of this system may be intercepted, monitored, recorded, copied, audited and otherwise disclosed to authorized County and law enforcement personnel. By using this system, the User consents to such interception and disclosure. All Users of this system are governed by all applicable policies and procedures of the County of Sonoma. Unauthorized or improper use of this system may result in administrative action including disciplinary action up to and including termination of employment and civil/criminal penalties. By continuing to use this system, you consent to these terms and conditions of use and represent that you are an authorized User. Please log off of this system immediately if you do not agree to the conditions stated in this notice.</p>		

This will direct you to the User Registration page. On this page, under **Register as a Supplier**, click **Register now**.



**User Registration**

**Register as a Bidder**

Click here if you have not done business with the County before and wish to be notified of and bid on events

**123**

[More...](#)

[Register now](#)

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**Register as a Supplier**

Click here if you currently or previously have done business with the County and wish to create an account and be notified of and bid on events

[More...](#)

[Register now](#)

The **Register now** link brings up a pop-up window, entitled **Supplier Registration**, where the registration process will take place. Once you begin your registration process, do not close the registration window. Closing this window will cause data entered to be lost, and entries cannot be retrieved. This pop-up window will close automatically at the end of the successful registration process.

supplier-desk@sonoma-county.org.' Below this is a numbered list of seven steps: 1. Enter your Supplier ID and Taxpayer Identification Number, or Social Security Number. 2. Create a User ID without spaces. 3. Create a password and confirm the password. 4. Enter your email ID. 5. Review the Terms of Agreement. 6. Click the check box next to 'Click to accept the Terms of Agreement below.' 7. Click submit to process your Supplier registration." data-bbox="172 456 818 709"/>

**Supplier Registration**

[Help](#)

**Register New User Accounts**

In order to register, you will need your County assigned Supplier ID and your Taxpayer Identification Number or Social Security Number.

If you do not have your Supplier ID number, please contact the County department you normally work with. You can also email a request to [supplier-desk@sonoma-county.org](mailto:supplier-desk@sonoma-county.org).

1. Enter your Supplier ID and Taxpayer Identification Number, or Social Security Number.
2. Create a User ID without spaces.
3. Create a password and confirm the password
4. Enter your email ID
5. Review the Terms of Agreement
6. Click the check box next to "Click to accept the Terms of Agreement below."
7. Click submit to process your Supplier registration.

## Enter Registration Information

**Supplier ID:** Enter your **County Supplier ID number**. If you do not have it on hand, please request it from our [Supplier Desk](#).

**Tax Identification Number:** Enter **Tax Identification Number** or **Social Security Number** associated with your Supplier ID in the following format: 123456789. Do not use spaces, dashes, or any other characters.

**User ID** - Enter desired **login name** without spaces.

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

**Confirm** - Retype password. Please save your User ID and password for future reference.

**Description** - Enter **job title**.

**Email ID** - Enter **email address**.

**Terms and Conditions** - Click box to accept the Terms of Agreement.

Click **Submit**.

### Supplier Registration

**Supplier List**

*Supplier ID	Tax Identification Number	
<input type="text"/>	<input type="text"/>	

**User Account Information** [?](#)

* Requested User ID	<input type="text" value="JANEDOE"/>
* Password	<input type="password" value="....."/>
* Confirm Password	<input type="password" value="....."/>
Description	<input type="text" value="Manager"/>
* Email ID	<input type="text" value="jane.doe@example.com"/>
Language Code	<input type="text" value="English"/>
Time Zone	<input type="text"/>
Currency Code	<input type="text" value="USD"/>

**Terms and Conditions**

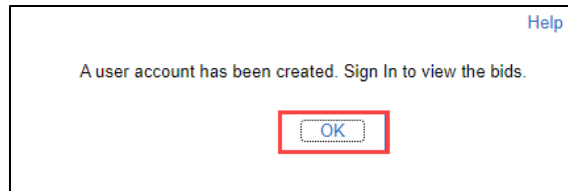
Make sure you read terms of agreement fully before submitting your registration.

Select to accept the Terms of Agreement below.

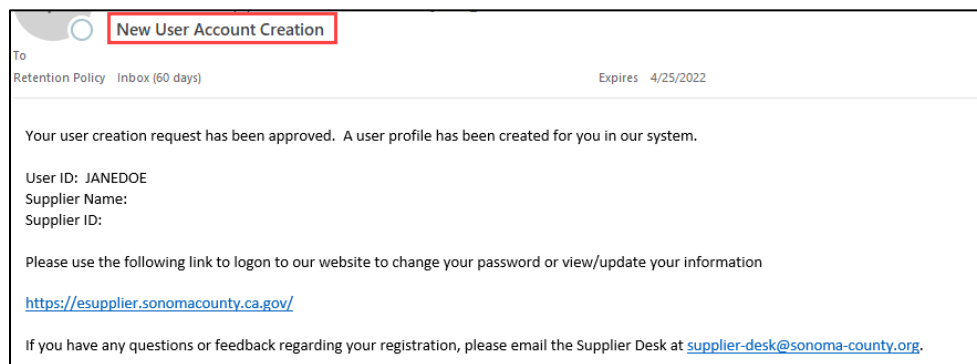
[Terms of Agreement](#)

## Registration Confirmation

You will receive an onscreen confirmation following successful registration. Click **OK** to close the pop-up Supplier Registration window.



You will also receive **confirmation emails** from PeopleSoft. The email with the subject "New User Account Creation" contains your User ID (example redacted). **Please save this email for future reference.**



You will also receive a confirmation email with the subject "User ID Registration." This email is to inform you that you have registered as a Supplier with the County, and it is not necessary for you to keep this email. The information contained in this email is also included in your New User Account Creation email.

**Please continue** – additional account configuration is needed in order to receive emailed notifications of County solicitations.

Once the pop-up window is closed, you will be redirected to the homepage where you can now **Sign In** to place bids.

A screenshot of the Sonoma County Supplier Portal homepage. The page is divided into several sections. On the left, there is a circular logo for Sonoma County, California, with the text "Sonoma County Portal" above it. Below the logo, there is a welcome message: "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." followed by a note: "The County only accepts electronic bids submitted through the Supplier Portal. Hard copy, faxed, and/or emailed submissions will not be accepted." Below that, it says "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." and "System may be temporarily unavailable for maintenance: Tuesdays 6:00-7:30am and Thursdays 5:30-7:30pm." At the bottom left, there is a paragraph about the living wage rate: "The living wage rate required under County's Living Wage Ordinance (LWO) has been increased. Effective January 1, 2022, the living wage rate required under the LWO shall be \$16.75 per hour, an increase over the previous \$15.00 per hour. The adjustment was adopted by the County's Board of Supervisors on December 14, 2021, in accordance with Sonoma Municipal Code section 2-377(d). All covered employees must be paid at least the increased living wage rate. Questions? Email [livingwage@sonoma-county.org](mailto:livingwage@sonoma-county.org)." On the right side of the page, there are four main navigation buttons: "Sign In" (yellow background with a right-pointing arrow icon), "User Registration" (white background with a person icon and a pencil), "Bidding Opportunities" (white background with an icon of people at a table), and "Executive Order N-6-22" (white background with a yellow warning triangle icon). Below the "Bidding Opportunities" button, it says "02 Opportunities". Below the "Executive Order N-6-22" button, it says "Required Compliance".

Sign in by entering your newly created User ID and Password and selecting [Sign In](#).

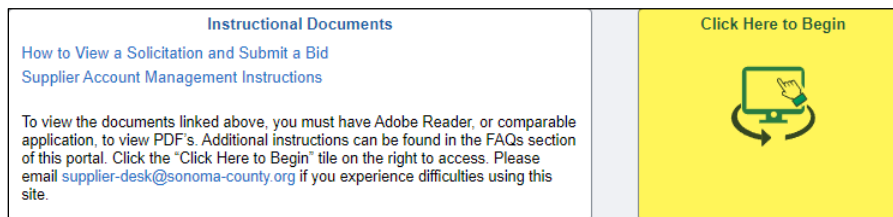


A screenshot of a 'Sign In' form. It features a title bar with 'Sign In' and a close button. Below the title bar, there are two input fields: 'User ID' with the text 'JANEDOE' and 'Password' with masked characters. Below the password field is a checkbox labeled 'Enable Screen Reader Mode'. At the bottom of the form is a blue 'Sign In' button and a link for 'Forgot Password?'.

**County of Sonoma Suppliers are responsible for self-managing their accounts, 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.**

### Profile Configuration Steps

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

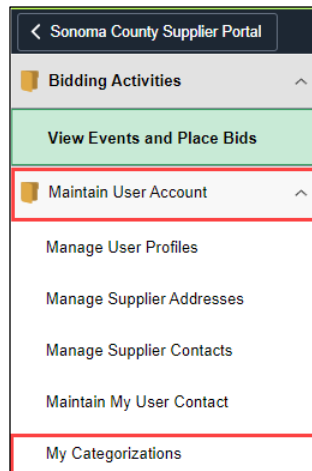


A screenshot of a user interface showing two panels. The left panel is titled 'Instructional Documents' and contains links for 'How to View a Solicitation and Submit a Bid' and 'Supplier Account Management Instructions'. Below these links is a paragraph of text: 'To view the documents linked above, you 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](mailto:supplier-desk@sonoma-county.org) if you experience difficulties using this site.' The right panel is a yellow tile with the text 'Click Here to Begin' and an icon of a hand pointing to a computer monitor with a circular arrow below it.

### Select 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](#).

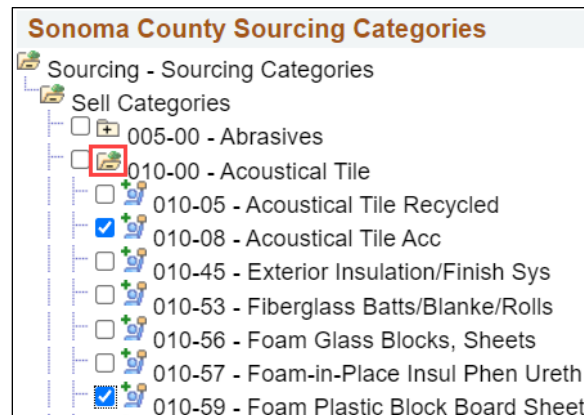


A screenshot of a navigation pane for the 'Sonoma County Supplier Portal'. The pane is titled '< Sonoma County Supplier Portal'. It contains several items: 'Bidding Activities' with an expand/collapse arrow, 'View Events and Place Bids', 'Maintain User Account' with an expand/collapse arrow, and 'My Categorizations'. The 'Maintain User Account' and 'My Categorizations' items are highlighted with red boxes. Below 'Maintain User Account', there are sub-items: 'Manage User Profiles', 'Manage Supplier Addresses', 'Manage Supplier Contacts', and 'Maintain My User Contact'.

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

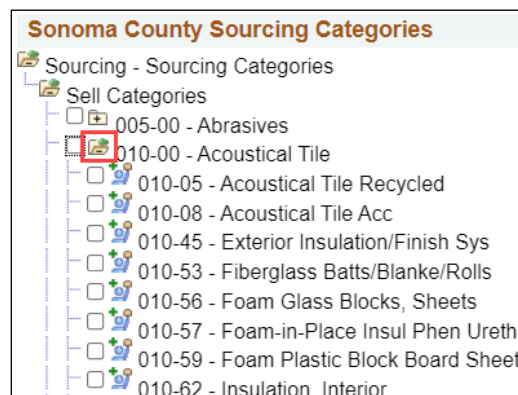


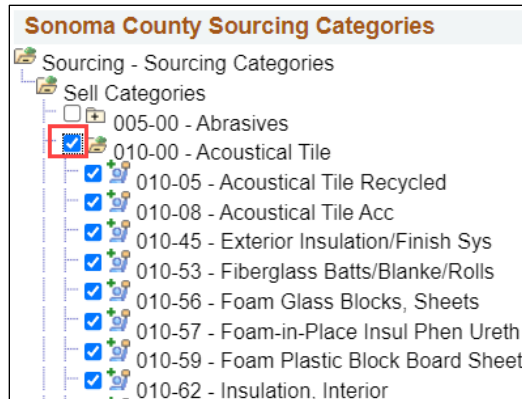
Search for the category list for goods and/or services your organization provides. Scroll, or use the Control+F command to search by keyword. When you have identified a category, click on the **file folder** next to the **category name** to view the subcategories. Check as many categories and/or subcategories 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

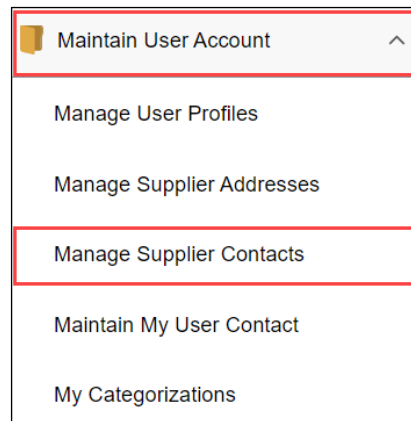
To select all subcategories, first expand the file folder for the category, and then select the checkbox next to the category. All subcategories will be checked.





## Add 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 **Manage Supplier Contacts**. You can edit and add new contacts in this section. **Without a contact assigned, your organization will not receive bid notifications.**



The image below shows the Current Contacts if there is not a contact assigned to your organization. To add a contact, select the **Add a New Contact** button.



The redacted image below shows the Current Contacts for an organization with multiple existing contacts. 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.

Maintain Contacts  
Current Contacts

Current Contacts

1-4 of 4

Description	Name		
Bidder		<b>Edit</b>	<b>Delete</b>
Material Sales		Edit	Delete
Material Sales		Edit	Delete
ACCOUNTING/BILLING		Edit	Delete

Add a New Contact

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.

Supplier Contacts

Maintain Contacts  
Contact Information

Description Bidder

Name Jane Doe

Email ID Jane.Doe@example.com

URLID http://

Location General Mailing Address

Role Executive Management

Status Active

Telephone Information

1-1 of 1

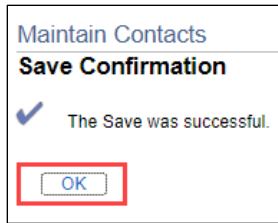
*Type	Prefix	Phone	Ext	
Business Phone	707	555-1234		Add Delete

Return to Contact List Future Contacts

**Save**

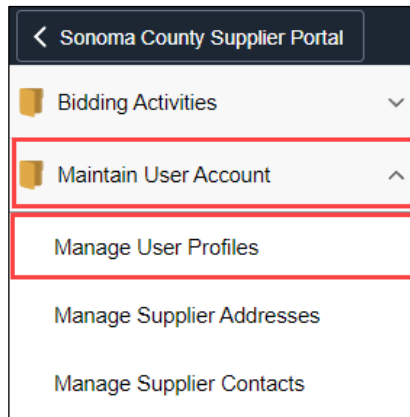
You will receive an onscreen confirmation when a contact is successfully saved. To add or update more contacts, select **OK** and repeat the process.



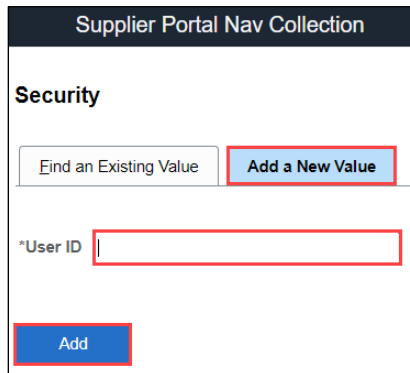


### **Add New Users from Your Company**

Users are people in your company who can login to 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**.



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**

**Logon Information**

User ID: NewBidder

Description: Fiscal Manager  
 (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: FiscalManager@example.com

Language Code: English

**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**

Role Name	Description	
Event Vendor	SC Event Vendor	<a href="#">Delete</a>

[Add a User Role](#)

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**

	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

[OK](#) [Cancel](#)

Click **Add a Supplier**.

Supplier Access

Supplier

Add a Supplier

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

Select a Supplier

Supplier Names

Supplier
<input checked="" type="checkbox"/> Business Name Here

OK Cancel

**Congratulations! You have performed basic configuration of your online Supplier account. For advanced configuration, please refer to the [Supplier Account Management Instructions](#).**