BIDDER ACCOUNT MANAGEMENT INSTRUCTIONS
County of Sonoma Supplier Portal

County of Sonoma Bidders 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 Bidder 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.

Navigating the Supplier Portal to Complete/Update User Profile

In order to complete your User Profile configurations, select the tile that states **Maintain User Account**.

Selecting or Updating Categories

The County will email solicitation notifications to Bidders 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**.

Click directly on the **file folder icon** 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 icon** next to the category name to view the subcategories. Check as many categories and/or subcategories as necessary.
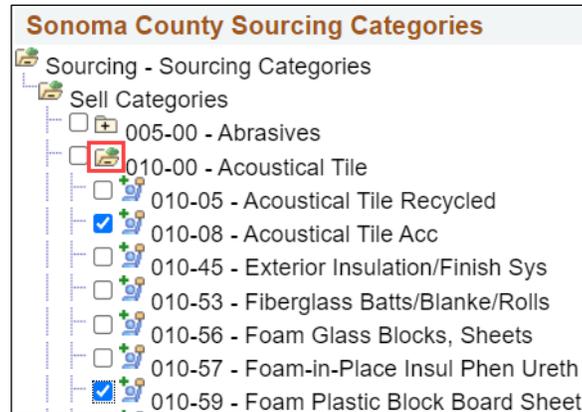
To select all subcategories in a category, first expand the file folder for the category, and then select the checkbox next to the category. All subcategories will be checked.
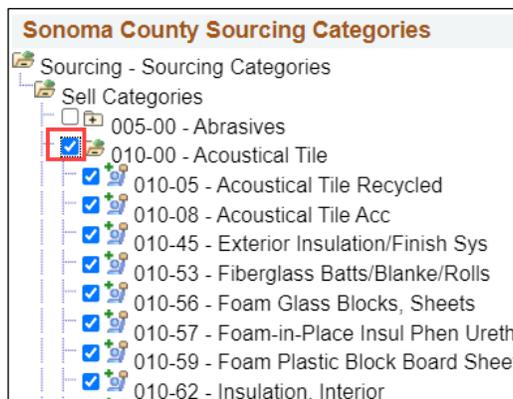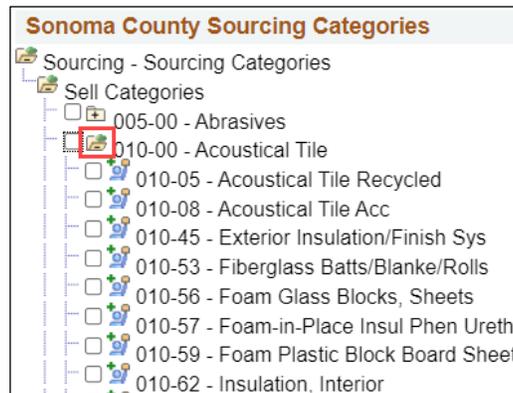
When finished, scroll to the bottom and click Save. Please note that it may take several minutes to save your progress if many categories are selected.

Save

Editing or Adding Contacts

Contacts are designated employees of your organization who can log into and use the account. On the left navigation pane, select **Maintain User Account** and then select **My Bidder Profile**. Select the **Contacts** tab. You can edit or add new contacts in this section.

Use the **navigation buttons** at the top of the User Information section to move between existing contacts.
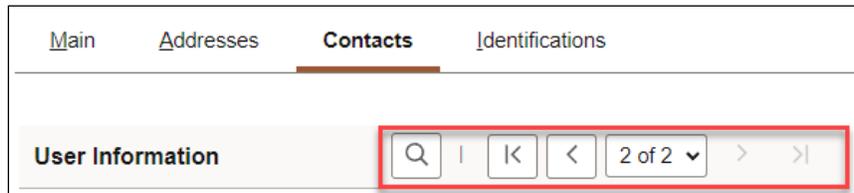
To edit an existing contact, use the navigation buttons to display the contact you wish to edit. Make changes by typing over the information displayed. When you have finished making changes, click **Save**.

To delete an existing contact, use the navigation buttons to display the contact you wish to delete. Click **Delete**.

Click **OK** to confirm or click **Cancel** to cancel the deletion. Note: The deletion will not be permanent until you save your changes. To save, click **Save** on the Contacts page.

Click **Save** when finished. A banner will display across the page when your changes to contacts are successfully saved. To add or update more contacts, repeat the processes outlined above.

Viewing and Updating Company Addresses

To view and update addresses, use the left navigation pane to select **Maintain User Account** then select **My Bidder Profile**. Select the **Addresses** tab.

Use the **navigation buttons** at the top of the Addresses section to move between existing addresses.

To remove an address, use the navigation buttons to locate the address you wish to remove. Click **Delete**. A confirmation page will display.

Click **OK** to confirm or click **Cancel** to cancel the deletion. Note: The deletion will not be permanent until you save your changes. To save, click **Save** on the Addresses page.

To add a new address, click **Add a New Address**. Choose the type of address by selecting the correct check boxes and entering the address in the fields provided. When finished, click **Save**.

Source: Supplier Account Management Instructions

Addresses

☐ Main Address   ☑ Ship To Address
☑ Bill To Address   ☑ Invoice Address

Address Details

Country   United States   Change Country

*Address 1 | 123 Main St |

Address 2 | |

Address 3 | |

Address 4: | |

*City | Santa Rosa |

County | | Postal | 95401 |

*State | CA 🔍 | California

[Add a New Address]   [Delete]

[Save]