



Sonoma County On-Line Purchasing (SCOP)

INSTRUCTIONS FOR NEW VENDOR REGISTRATION

Welcome to the Sonoma County On-Line Purchasing System (SCOP). We are very excited about SCOP and hope you find it exciting and useful. One of the key advantages to SCOP is that you select the specific commodities for which you wish to receive bid notices. Additionally, you get to maintain your own account, and assign users to your account. It will be very important that you keep your account updated with the most current information. After all, we don't want you to miss out on any opportunities to do business with us.

BEFORE YOU REGISTER, we suggest that you have the following information available:

1. Your Company's 9-digit Federal Tax Identification Number (FEIN).
2. Your company email address.
3. A well thought out temporary password.

Note: SCOP will require you to change your password the first time you return.

YOUR RIGHT TO PRIVACY

Sonoma County respects your right to privacy. The SCOP database and application is fully secure and encrypted to the highest standards available. Please see our Privacy Policy for more information.

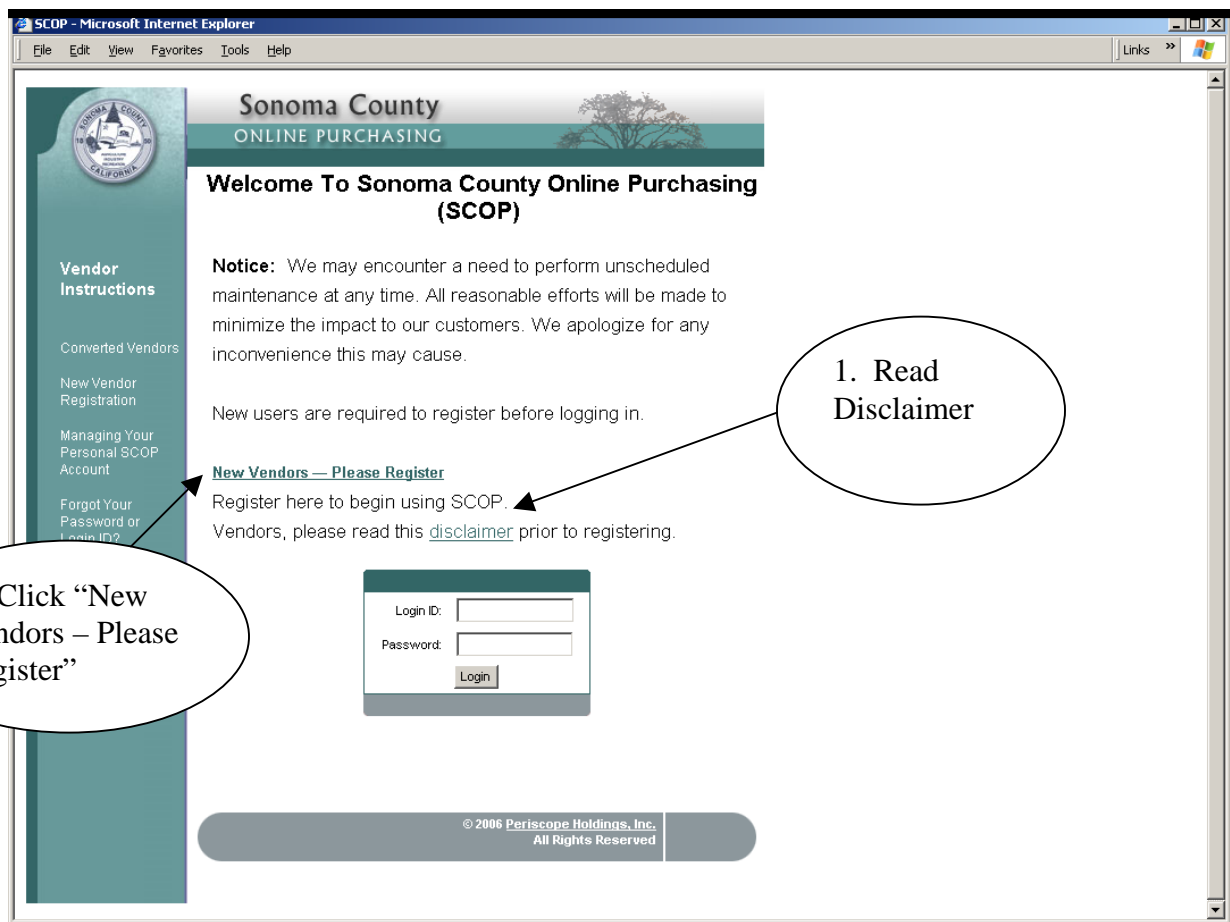
REGISTRATION

You are now ready to register in SCOP. Type the SCOP website address in your browser and bookmark it for future reference: <https://bso.sonoma-county.org> . The following pages will guide you step by step through the registration process.

Step 1 - Login

The SCOP login screen will appear as shown in Screenshot 1 below.

1. Read Disclaimer
2. **CLICK** “New Vendors – Please Register”.

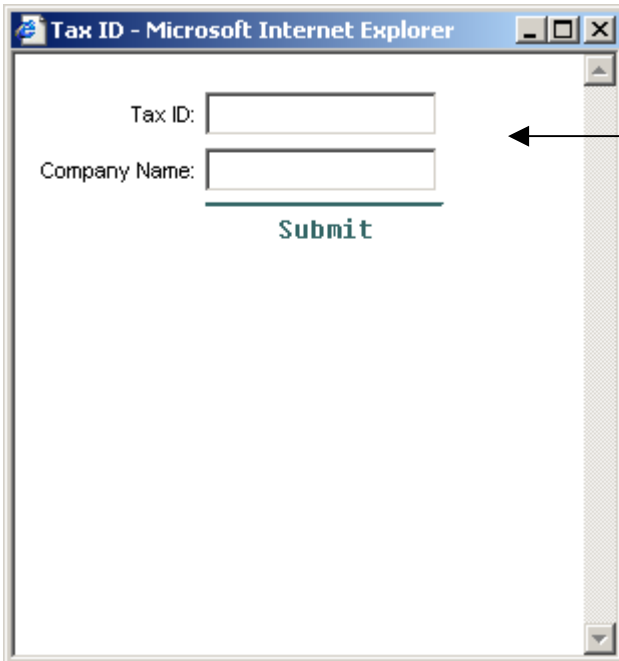


Screenshot 1

Step 2 – Tax ID

The SCOP Tax ID screen will appear as shown in Screenshot 2.

1. Enter your nine digit Tax ID and your Company Name
2. CLICK “Submit”.

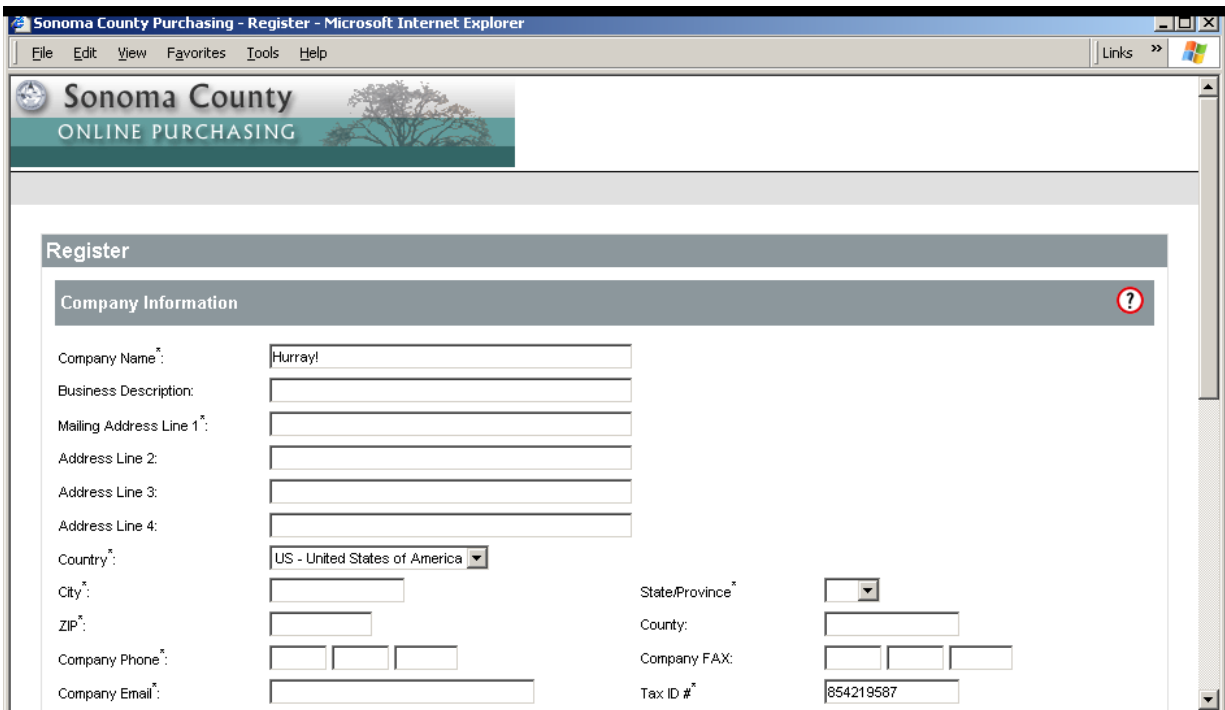


Enter your Tax I.D. Number and Company Name.
Click “Submit”

Screenshot 2

Step 3 - Register

You are now at the Register screen shown below.



Screenshot 3

Please do not use the “back” button during registration!!

Please complete the form as shown in Screenshot 3. **Important note: Fields with an asterisk (*) are required in order to continue with the registration process.**

Hint: If any of the information provided is incomplete, you may see this message, “Please correct the following error(s)”. The message will let you know exactly which item needs to be “fixed”.

1. Verify that your organization’s name is correct.
2. **ENTER** a mailing address, city, state, zip, and phone number.
3. **ENTER** an email address; otherwise you will not receive bid notifications.
REMINDER: Once we begin processing bids in SCOP, bid notifications will be sent to you via email.
4. Select whether your company would like to be a preferred Emergency supplier during a natural disaster. If “Yes” complete the bottom portion of the screen. If “No,” the emergency supplier section isn’t required.
REMINDER: The emergency phone number requires access to a person that can supply us with required goods, 24 hours a day, 7 days a week during the disaster.

* Indicates required fields

Critical to receiving bids

Preferred Delivery method

Do you want to be one of our Emergency suppliers?

The screenshot shows a web browser window titled "County Purchasing - Register - Microsoft Internet Explorer". The form contains the following fields and sections:

- Country:** US - United States of America (dropdown)
- City:** (text input)
- ZIP:** 98388 (text input)
- Company Phone:** 888 888 8888 (text input)
- Company Email:** (text input)
- State of Incorporation:** CA (dropdown)
- Preferred Delivery Method:** Email (dropdown)
- Emergency Supplier Question:** Would you like to be registered as an emergency supplier in the case of an emergency? Yes No. Note: Emergency suppliers must be available 24 hours a day, 7 days a week.
- Emergency Phone:** (text input)
- Ext.:** (text input)
- Emergency Contact:** (text input)
- Emergency Email:** (text input)
- Emergency Info Comment:** (text input)
- Administrative User Information:** (Section header with a help icon)
 - Salutation:** (dropdown)
 - First Name:** (text input)
 - Last Name:** (text input)
 - Job Title:** (text input)
 - Department:** (text input)
 - Email:** (text input)
 - Phone:** (text input)
 - Login ID:** (text input)
 - New Password:** (text input)
 - Confirm Password:** (text input)
 - Login Question:** (text input)
 - Login Answer:** (text input)

At the bottom of the form are buttons: "Add Another Address", "Continue Registration", "Reset", and "Cancel". The footer text reads: "Copyright © 2006 Periscope Holdings, Inc. - All Rights Reserved."

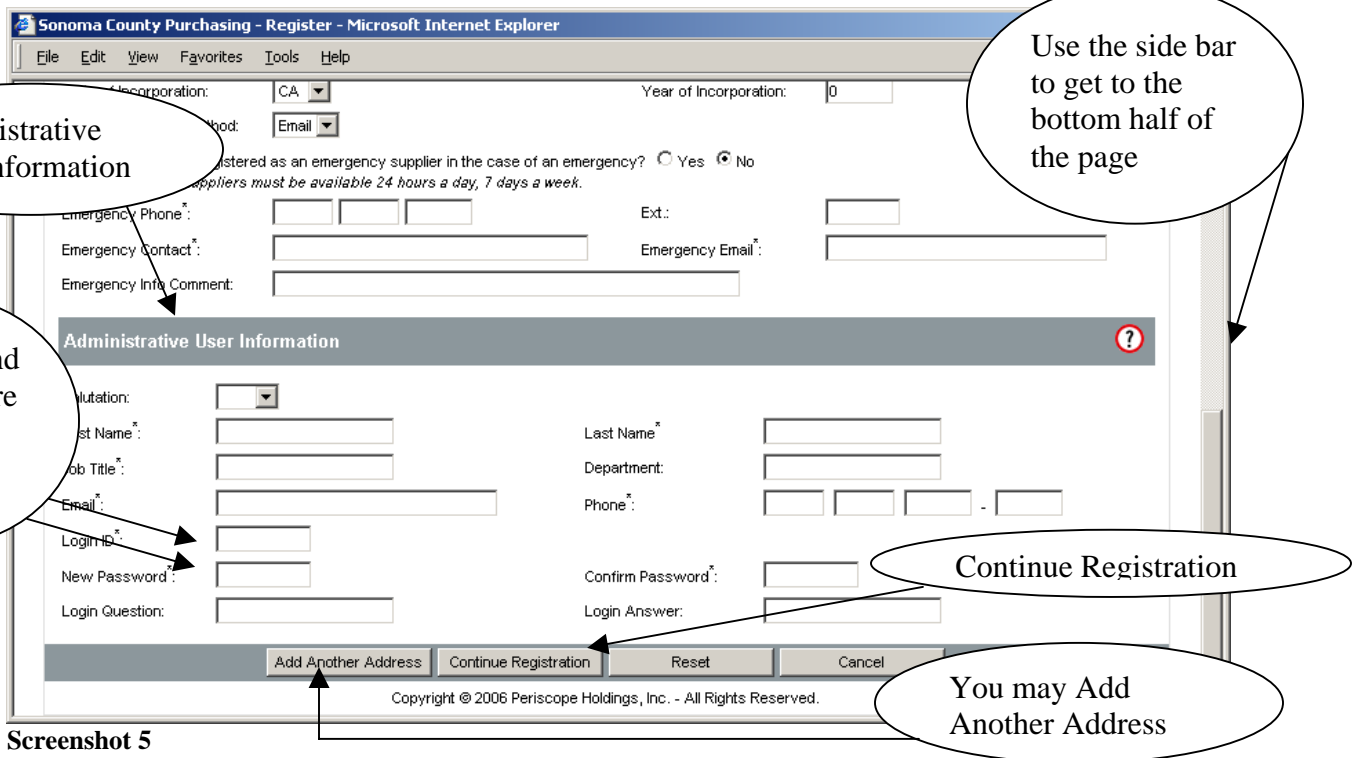
Screenshot 4

Step 4 – Administrative User Information

The Administrative User Information section is where your **Login ID and password are created.** It is located at the bottom of the “Register” form (see Screenshot 5). The Administrative User is responsible for updating your company’s information, i.e., current phone number, fax number, email address, etc. and is also known as the “Seller Administrator”. Only an administrator can add users to your company account.

Remember an asterisk * indicates required fields. Although the Login Question and Login Answer fields are not required, we recommend that you complete them. The login question will be asked of you in the event that you forget your password. If answered correctly, your login ID and password will be emailed to you.

1. **ENTER** the first and last name of the Administrative User.
2. **ENTER** the job title of the Administrative User.
3. **ENTER** an email address (the Company email address and the Administrative User email address may be the same).
4. **ENTER** a login ID and Password (your password will be temporary; the first time you sign in after registering, you will be required to change it).
5. **ENTER** a login question and login answer.
6. **Click** either “Continue Registration” and turn to page 7, or “Add Another Address” and turn to page 6, after completing this Registration Form.

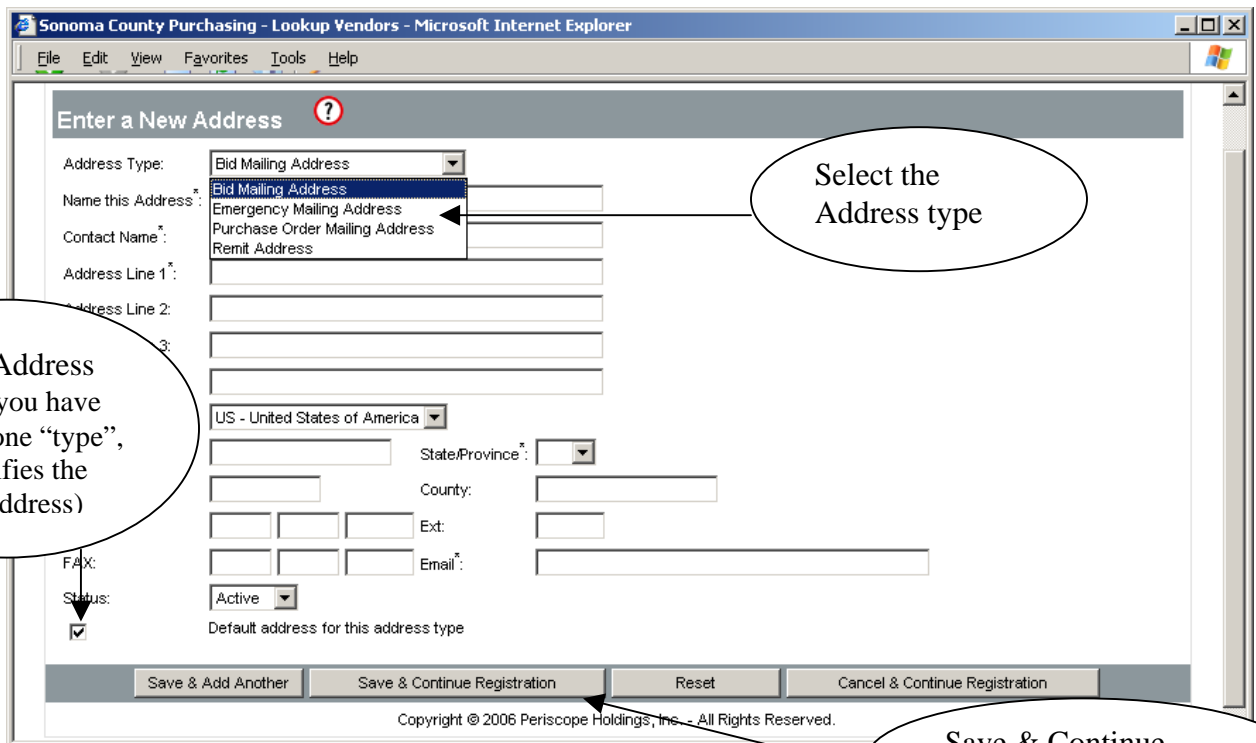


If any of the information you provide is incomplete you will not be allowed to move forward in the registration process until it is completed to SCOP’s satisfaction.

Add Another Address

SCOP allows you to enter multiple addresses and types. If you wish to add additional addresses to your file, **CLICK** “Add Another Address” tab (see Screenshot 5). You are now at the “Enter a New Address” screen (Screenshot 6).

You will need to select an address type for each address entered. You may have multiple addresses for each “type; however, each “type” must have (only) one “default” address. The “default” address is identified by a check in the Default Box on the lower left of the screen.



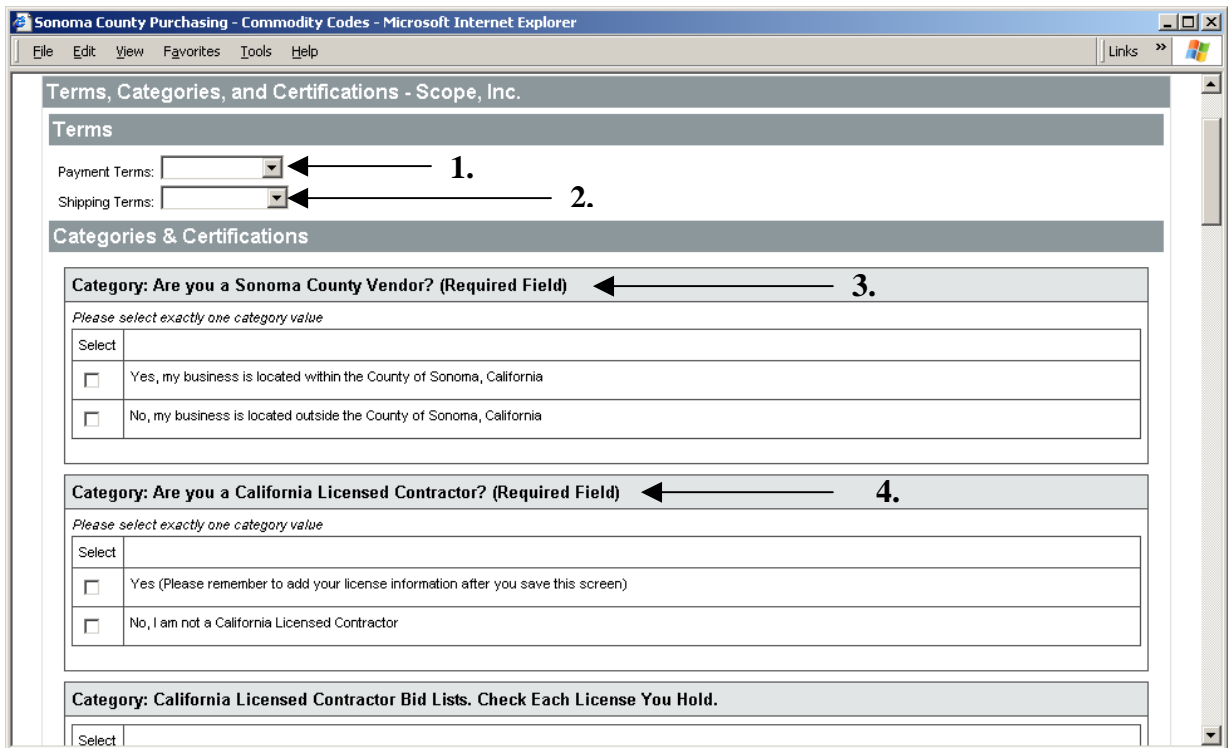
Screenshot 6

You may Save & Add Another Address or **CLICK** “Save and Continue Registration” to move on to Step 5.

Step 5 –Terms ,Categories, and Certifications Form

The Terms, Categories and Certifications screen is displayed as shown below in Screenshot 7. Complete this screen while keeping in mind the following information:

1. **Payment Terms:** The County cannot commit to processing a payment in less than 30 days. Therefore, when evaluating bid prices, the County will not include in the evaluation any prompt payment discounts of less than 30 days. However, upon bid award, the Purchase Order will show any prompt payment discount offered.
2. **Shipping Terms:** The County’s shipping terms are always FOB Destination. If you choose to offer a different option, you must add this information to your quote. Please note that when quoting anything other than F.O.B. destination, the County may choose not to do business with your company.
3. **Are you a Sonoma County Vendor?** This is a required field. SCOP will not allow you to move forward unless you check yes or no.
4. **Are you a California Licensed Contractor?** This is a required field. SCOP will not allow you to move forward until you check yes or no.
 - a. If you are **NOT A CALIFORNIA LICENSED CONTRACTOR**, you have completed this page. Move the cursor to the bottom of the page and **CLICK** “Save & Continue Registration” and go to Page 12 of this manual.
 - b. If you **ARE A CALIFORNIA LICENSED CONTRACTOR**, you will need to add additional information to this screen. Please turn the page and continue reading.

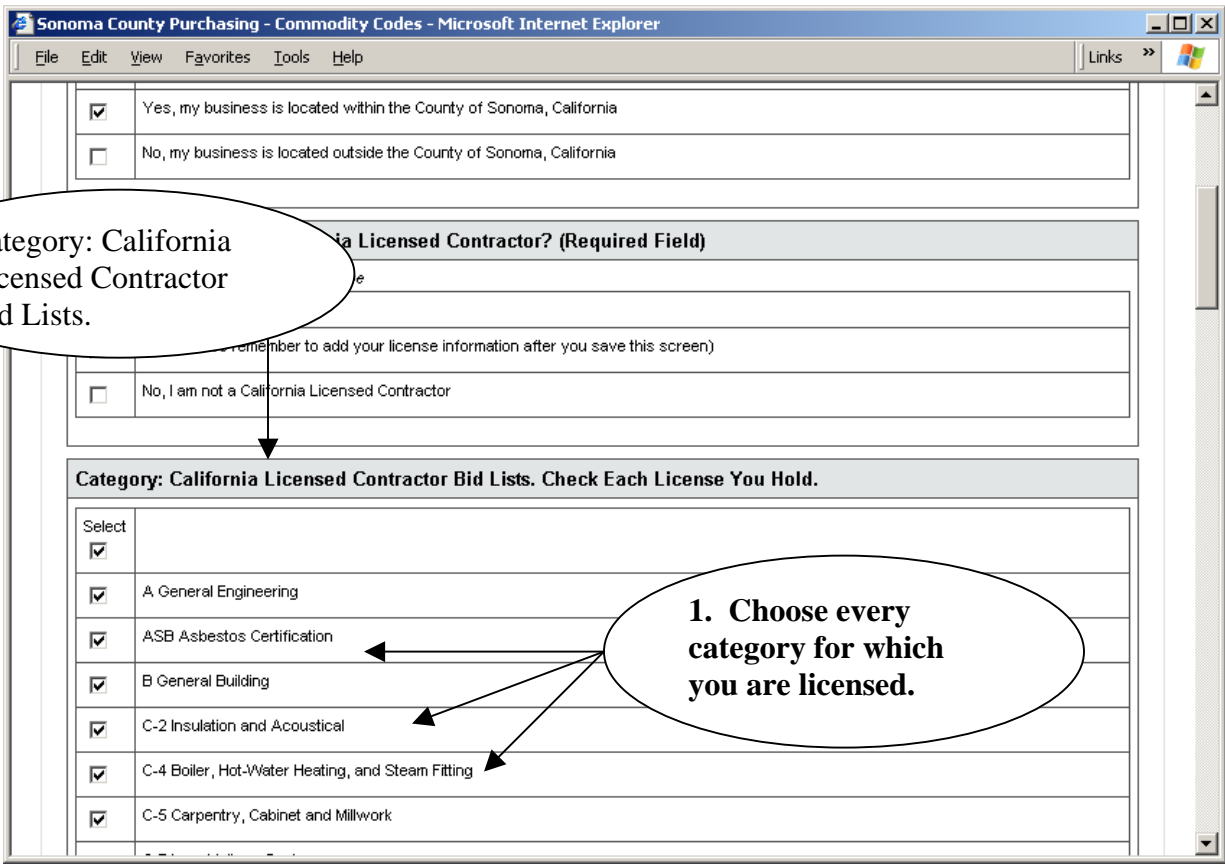


Screenshot 7

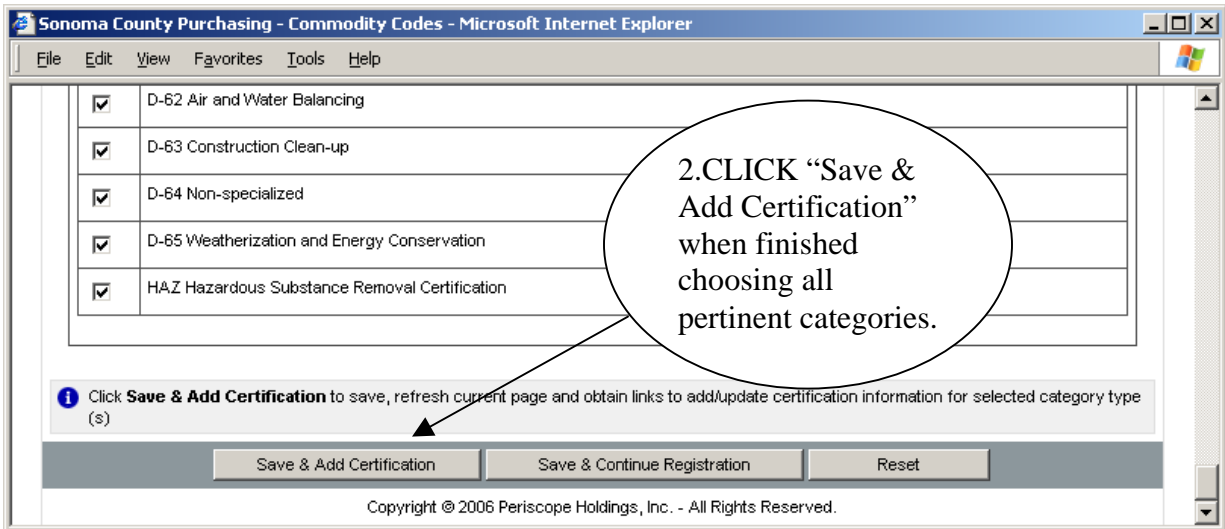
Step 6 – California Licensed Contractors – Choosing Categories

“Category” California Licensed contractor bid Lists” allows for selection of classifications for which you are licensed.

1. If you are a California State Licensed Contractor, go to the Category: California Licensed Contractor Bid Lists section as shown in Screenshot 8.
2. **CLICK** every box for which you hold a valid California Contractor’s License. By checking the appropriate boxes, you will be registered to receive notification of all bids requiring your license classification.
3. **CLICK** “Save & Add Certification” when you have completed checking all appropriate boxes (see Screenshot 9).



Screenshot 8

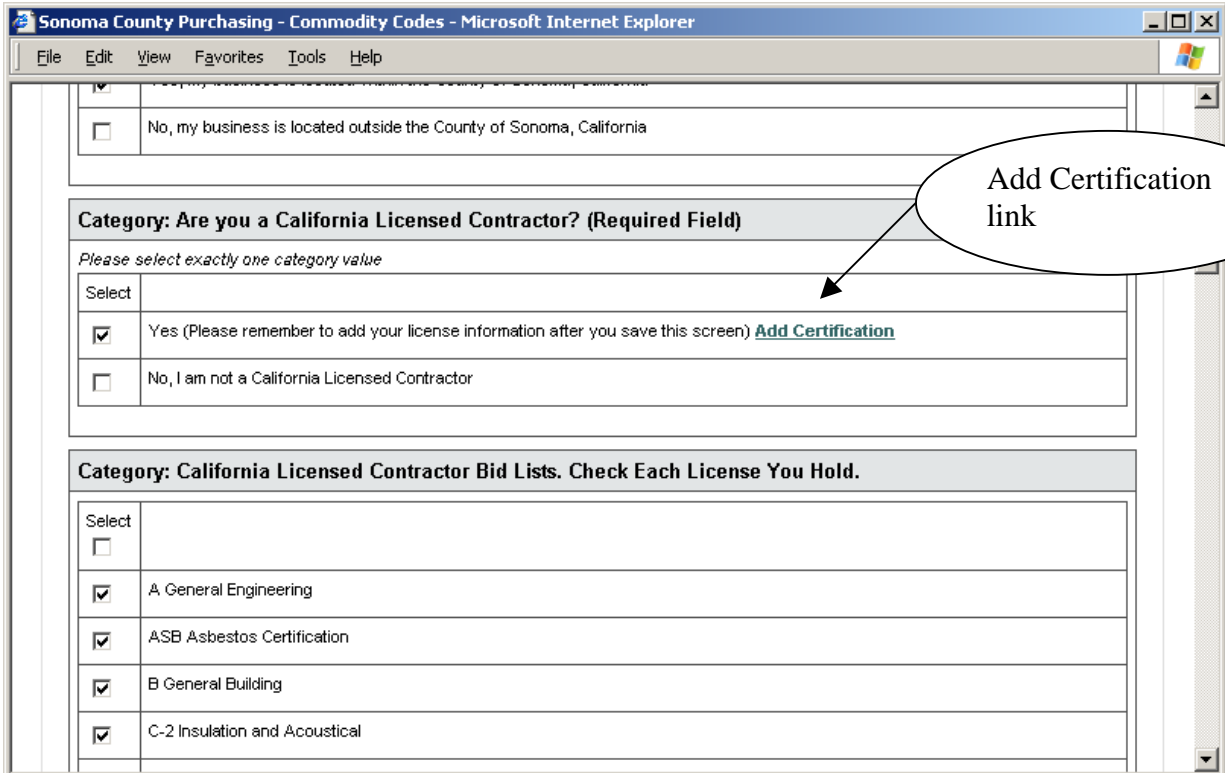


Screenshot 9

Step 7 – California Licensed Contractors – Add Certification Link

The Terms and Categories form is still displayed and is now showing an “Add Certification” link, as shown in Screenshot 10.

1. **CLICK** on the “Add Certification” link.



Screenshot 10

Step 8 – California Licensed Contractors – Add Vendor Certification

The “Add Vendor Certification form is displayed on your screen as shown in Screenshot 11. Enter all required information (as denoted by *).

1. Enter License number.
2. Enter Date issued.
3. **CLICK** “Save & Exit” (see Screenshot 11). Clicking “Save & Exit” will return you to the Terms, Categories, and Certifications screen (see Screenshot 11).

Screenshot 11 shows the "Add Vendor Certification" form for Scope, Inc. in Microsoft Internet Explorer. The form includes the following fields and controls:

- Vendor ID: 008429
- Category: [Empty]
- Category Type: Yes (Please remember to add your license information after you save this screen)
- Certification Source: California Contractors State License Board
- Certification ID *: [Empty] ← 1.
- Certified Date (MM/DD/YYYY) *: [Empty] ← 2.
- Certification Status: Active
- Certification Description: [Empty]

At the bottom of the form are four buttons: Save & Exit, Save & Continue, Reset, and Close Window. A callout bubble points to the "Save & Exit" button with the text: "Click 'Save & Exit to return to the Terms, Categories and Certifications screen.'"

Another callout bubble points to the Certification ID and Certified Date fields with the text: "1. Enter License # here. 2. Enter Date Issued."

Screenshot 11

Just a few more steps and registration will be complete.

Terms, Categories, and Certifications - Scope, Inc.

Terms

Payment Terms: \$0.25/ton - 30

Shipping Terms: FOB Destination

Categories & Certifications

Category: Are you a Sonoma County Vendor? (Required Field)

Please select exactly one category value

Select	
<input checked="" type="checkbox"/>	Yes, my business is located within the County of Sonoma, California
<input type="checkbox"/>	No, my business is located outside the County of Sonoma, California

Category: Are you a California Licensed Contractor? (Required Field)

Please select exactly one category value

Select	
<input checked="" type="checkbox"/>	Yes (Please remember to add your license information after you save this screen)

Certification #	Certification Source	Description for Source Other	Certified Date	Certification Description	Status	Delete
4588888	California Contractors State License Board		02/01/2006		Active	<input type="checkbox"/>

Screenshot 12

Go to the bottom of the screen and **CLICK** “Save & Continue Registration”.

Sonoma County Purchasing - Commodity Codes - Microsoft Internet Explorer

<input checked="" type="checkbox"/>	D-62 Air and Water Balancing
<input checked="" type="checkbox"/>	D-63 Construction Clean-up
<input checked="" type="checkbox"/>	D-64 Non-specialized
<input checked="" type="checkbox"/>	D-65 Weatherization and Energy Conservation
<input checked="" type="checkbox"/>	HAZ Hazardous Substance Removal Certification

CLICK: “Save & Continue Registration”

Save & Add Certification **Save & Continue Registration** **Reset**

Click **Save & Add Certification** to save, refresh current page and obtain links to add/update certification information for selected c type(s)

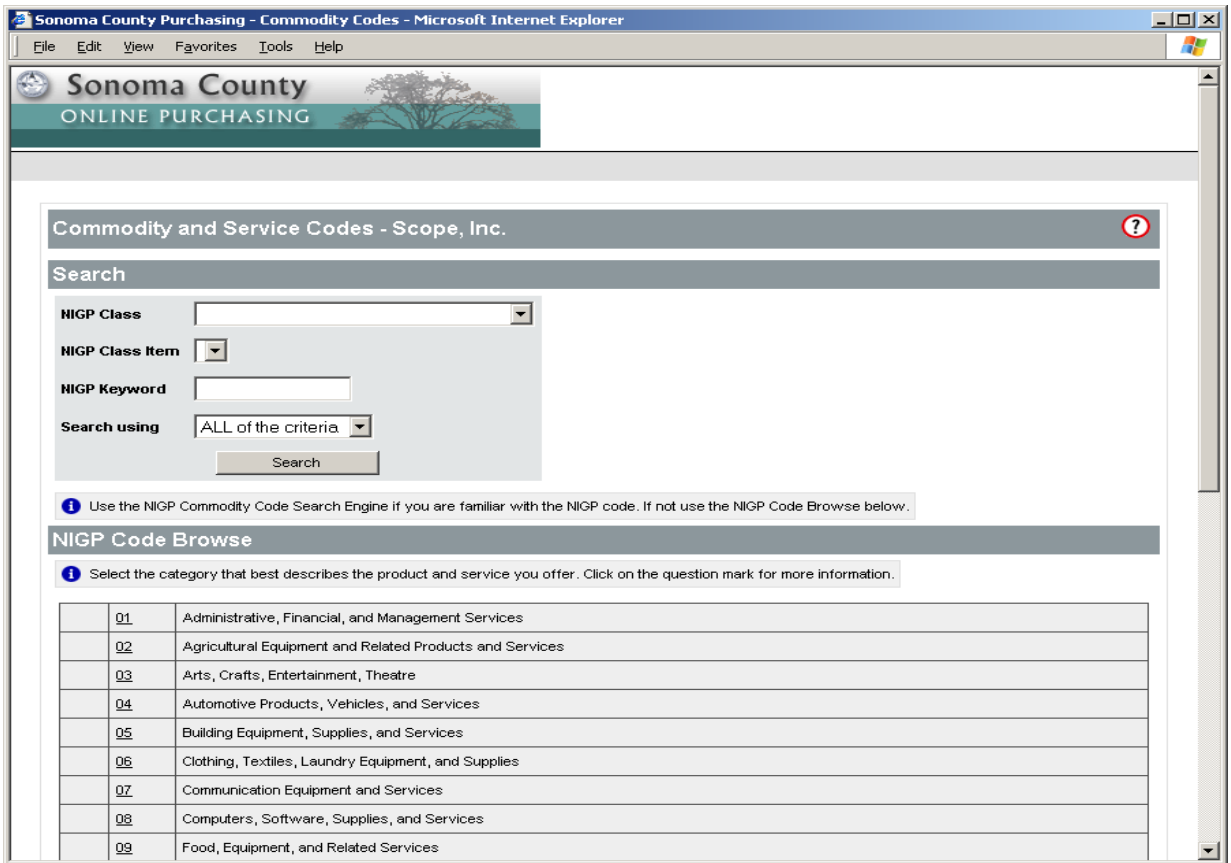
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Screenshot 13

Please do not use the “back” button during registration!!

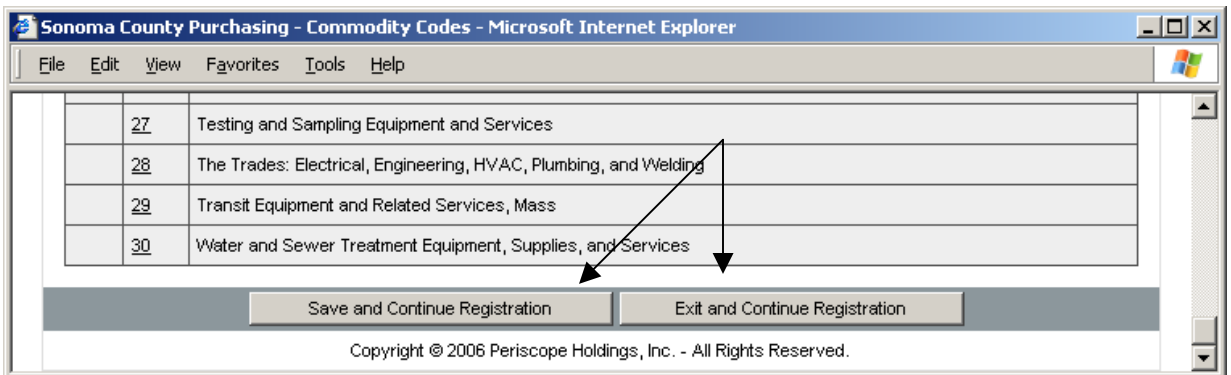
You are now at the “Commodity and Service Codes” screen.

Note: NIGP is the acronym for National Institute of Governmental Purchasing. SCOP uses their commodity classification system.



Screenshot 14

1. If your company also sells goods (without labor) turn to the next page of this manual, **Step 9–Commodity and Service Codes** section, to complete the registration process.
2. If your company does not sell goods (without labor), go the bottom of the screen and **CLICK** either “Save and Continue Registration” or “Exit and Continue Registration”. Both will take you to Screenshot 21 shown on Page 18. Turn to page 18 of this manual.



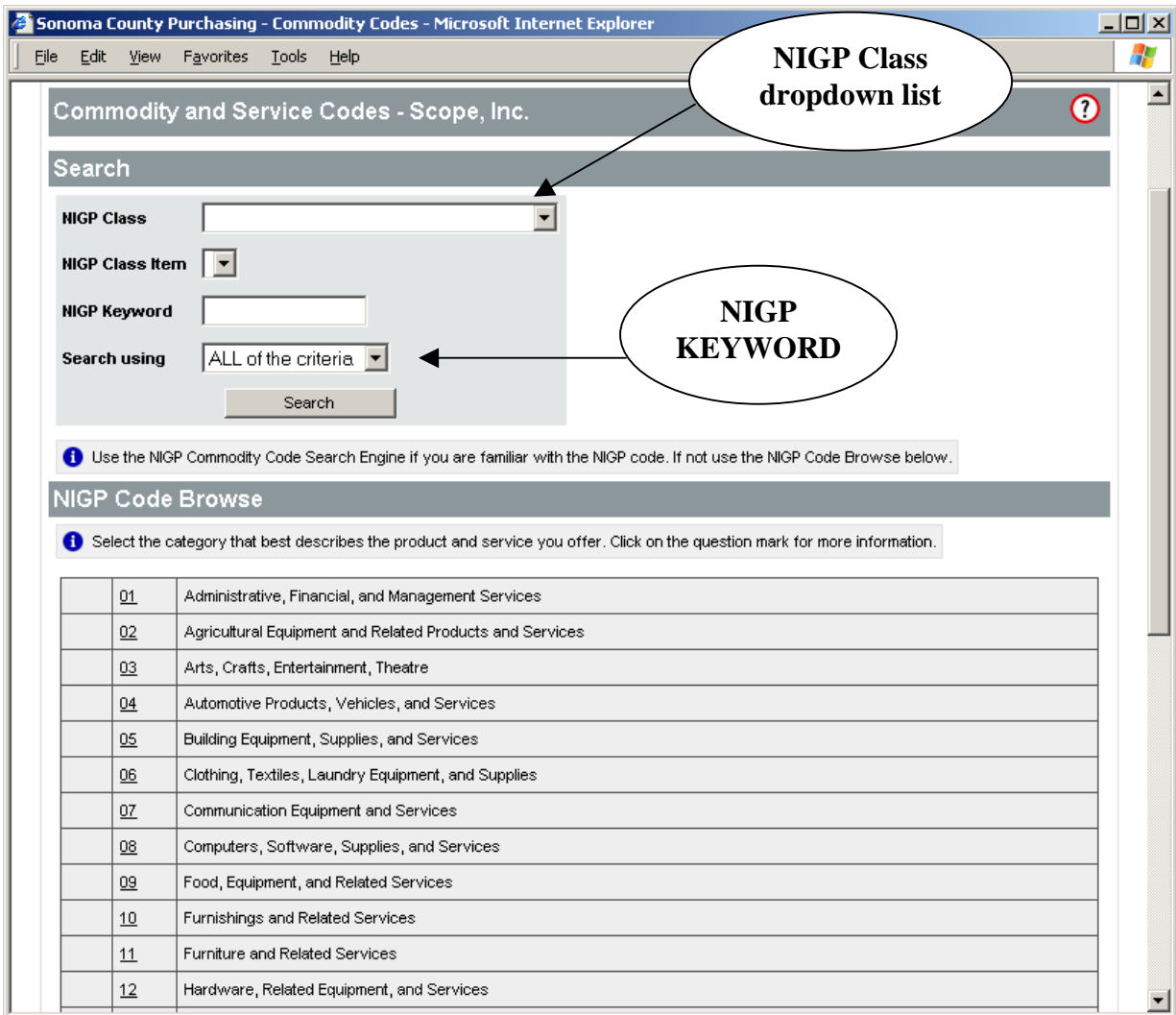
Screenshot 15

Step 9 –Commodity and Service Codes

You are now at the “Commodity and Service Codes” area (see Screenshot 16). The Commodity and Service Codes Section is where you sign up to receive bids for particular commodities or services. Signing up does not guarantee that we will go out to bid for the particular commodity or service but if we do, you will be notified.

Note: We are aware that some vendors are registering so that payments can be processed through SCOP. So, if you are not interested in bidding, scroll to the bottom of this screen (Screenshot 16) and **CLICK** “Save and Continue Registration” or “Exit and Continue Registration”.

As shown below in Screenshot 16, the Search area of the commodity and service codes screen offers two ways of searching and choosing commodity and service codes. Some people find it easiest to explore by NIGP Class. Others prefer using NIGP Keyword search field. We have provided instructions for both. Please continue on for instructions on these search techniques.

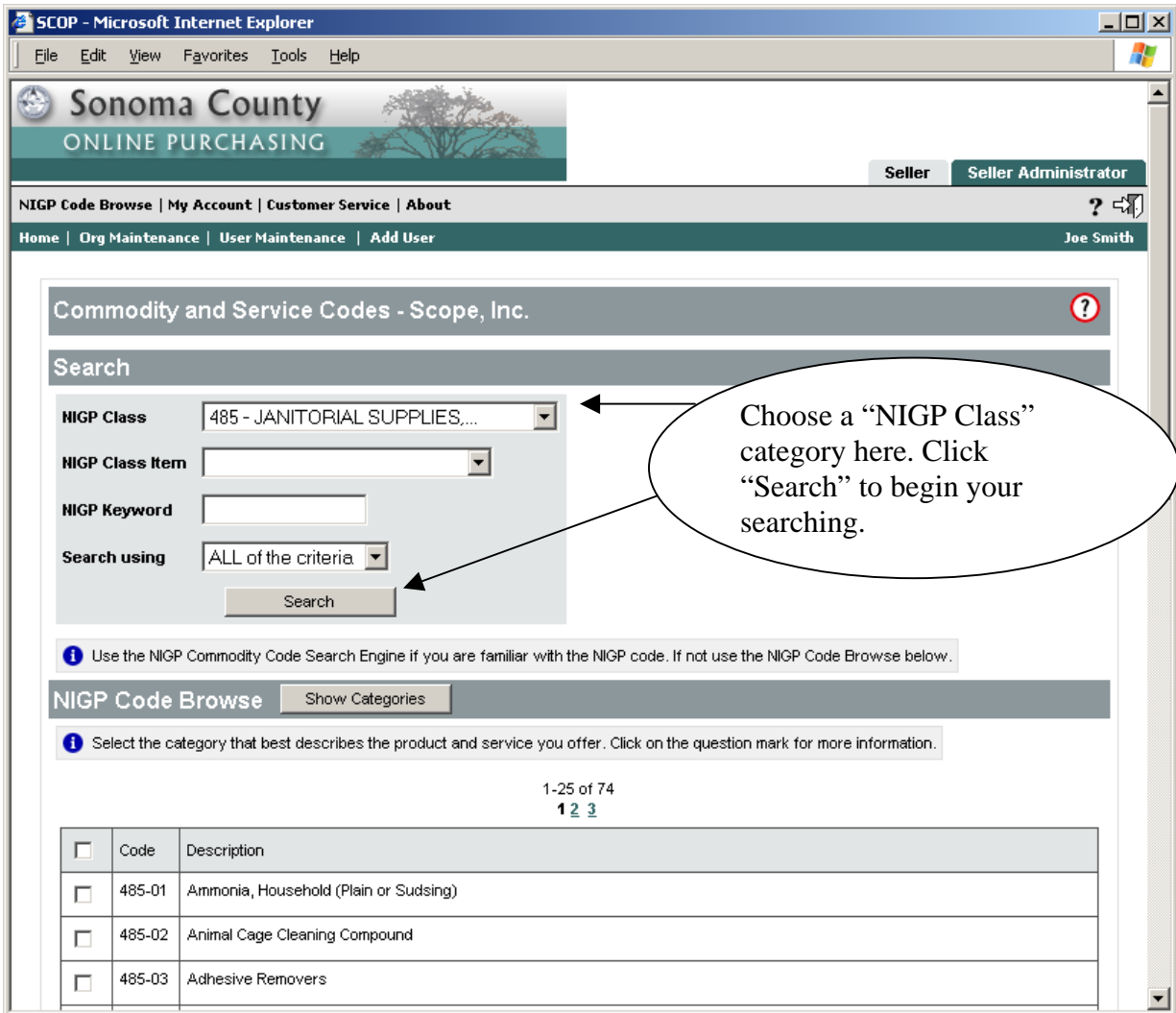


Screenshot 16

Step 10 – NIGP Class Search

For our example, “janitorial supplies,” was the selected class chosen within the NIGP Class search box.

1. **CLICK** on the dropdown box next to the NIGP Class field, to search by NIGP Class.
2. Select a commodity (you may repeat this process for different products).
3. **CLICK** “Search” once you have made your selection.
4. Turn to Page 16 to complete the commodity registration process using the NIGP Class Search feature **Or** continue to the next page to learn how to Search by using keywords.



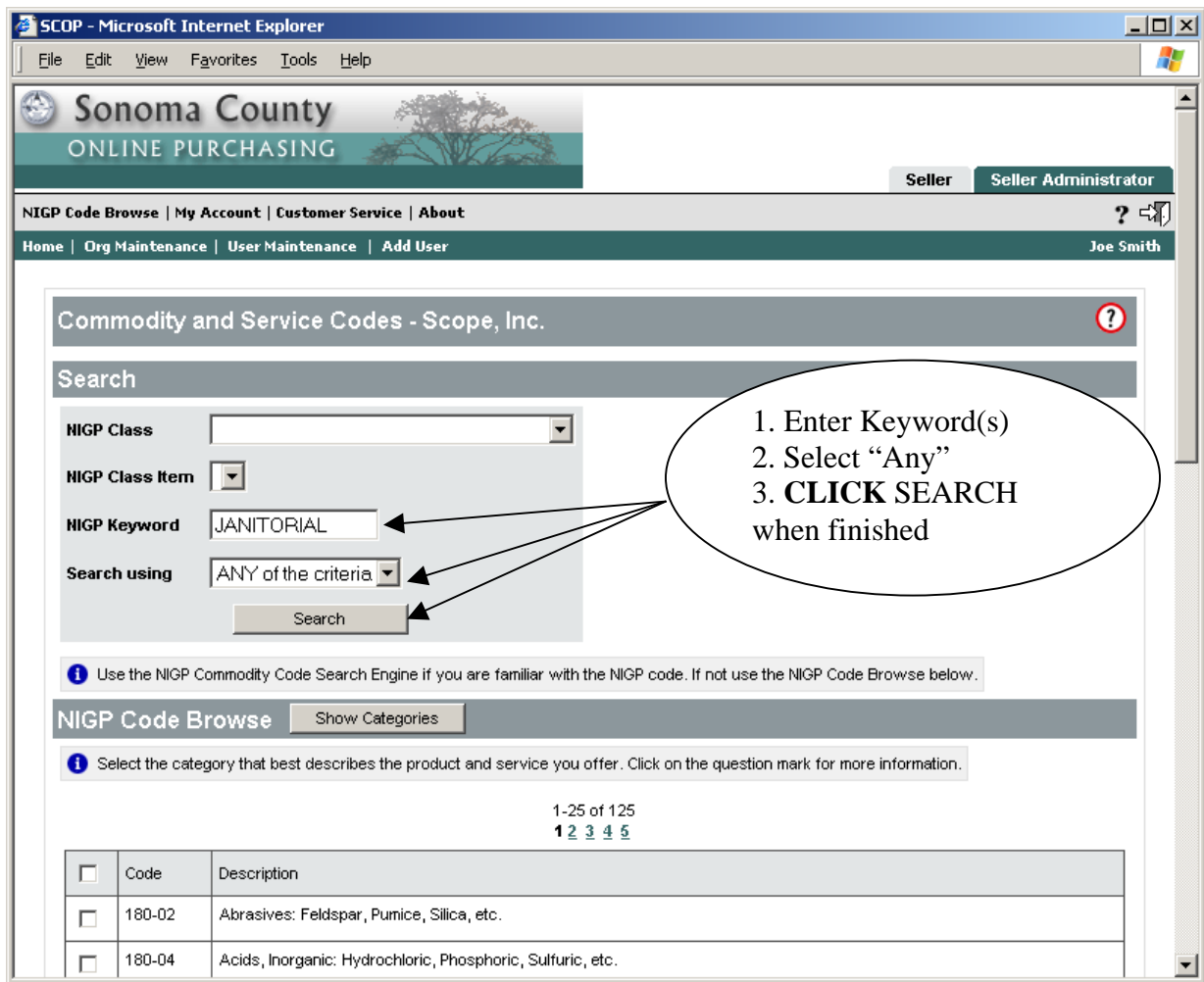
Screenshot 17

Step 11 – NIGP Keyword Search

Searching by keywords is another way to choose commodity and service codes. For our example as shown in Screenshot 18 below, we are using the word “janitorial” in our NIGP keyword search field to search for janitorial supplies. To use this search method, the NIGP Class Field must be blank.

1. Find the NIGP Keyword field and **TYPE** the word that best describes the goods and/or services you provide (one very descriptive word).
2. **SELECT** “ANY of the criteria” option from the “Search Using” drop down menu.
3. **CLICK** “Search” to see your results.

HINT: (You may need to try several different keywords to tap into the correct category)

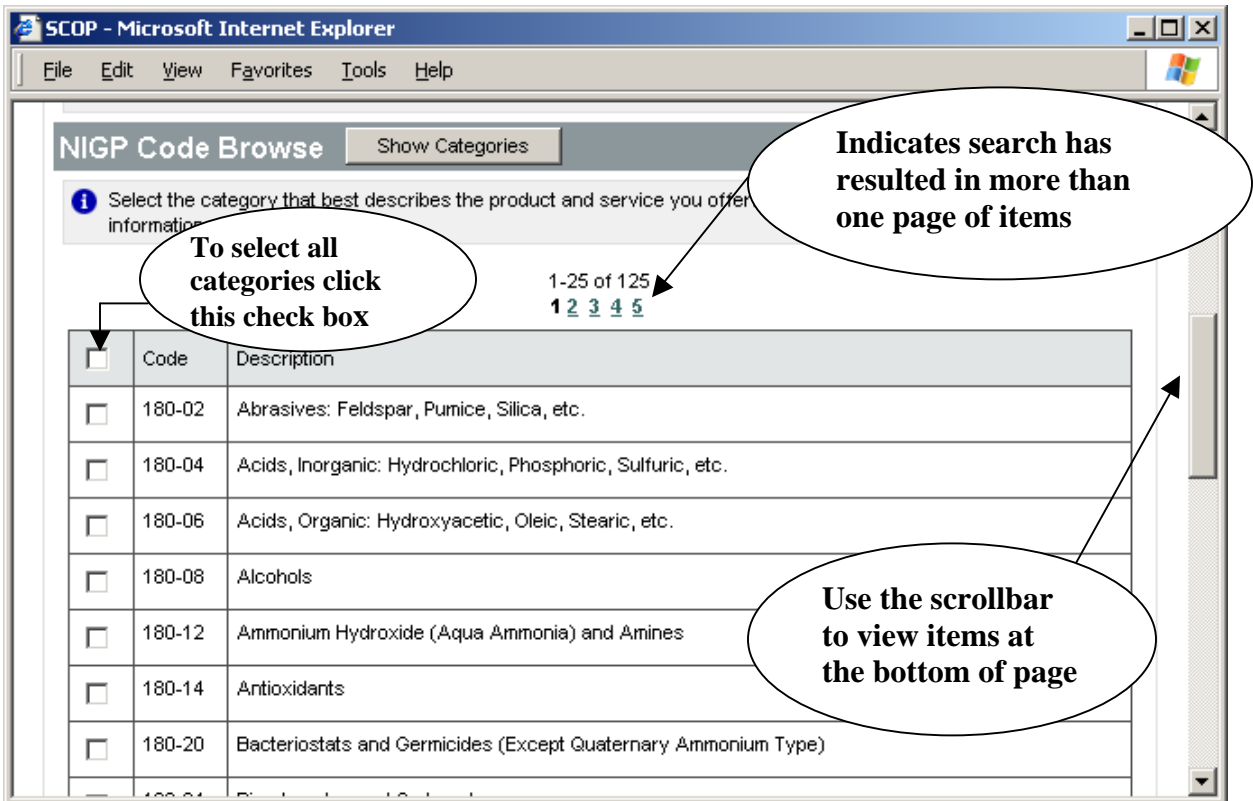


creenshot 18

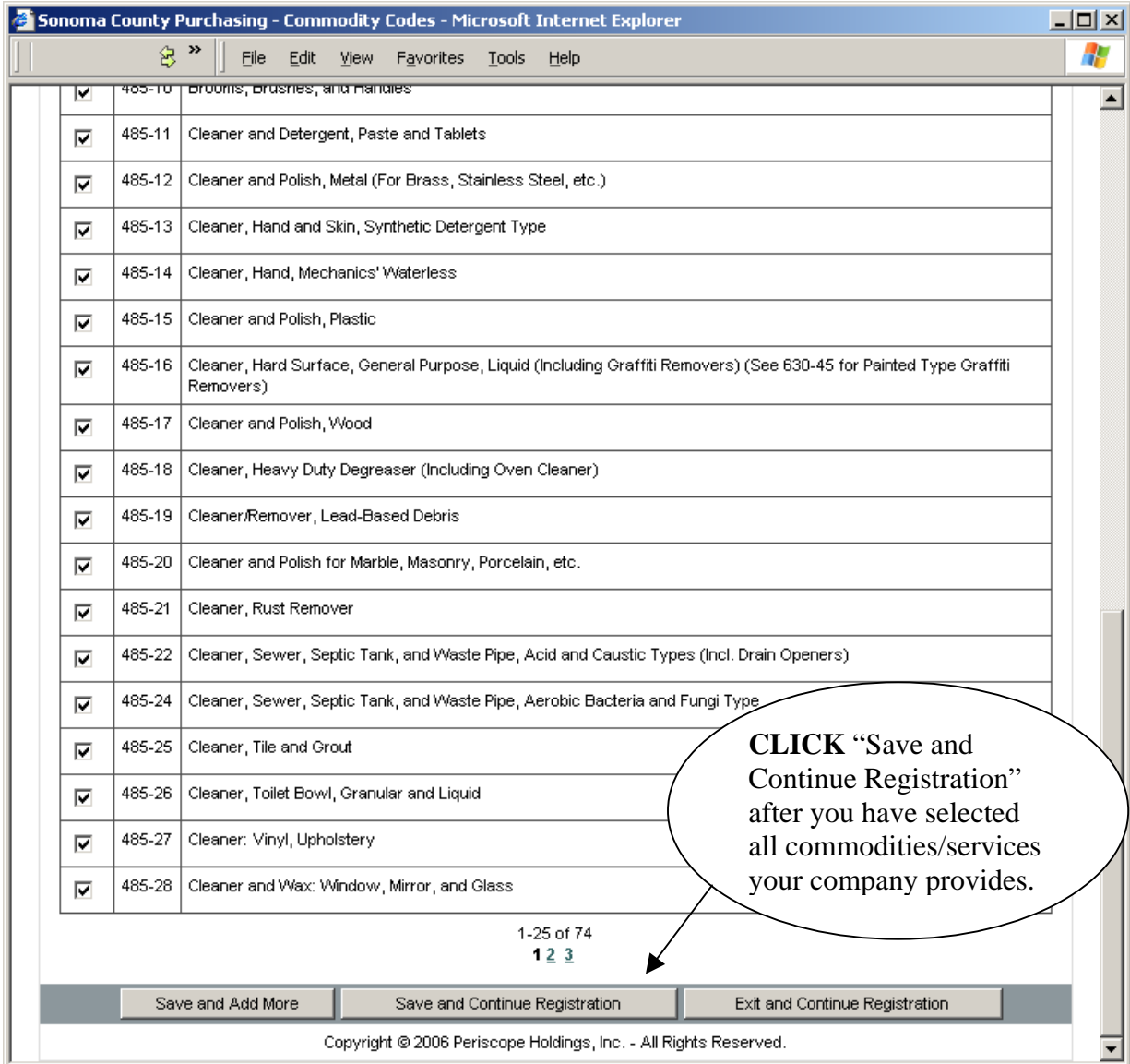
Step 12 – Selecting Commodity/Service Categories

Regardless of the search technique used, the screen will look similar to Screenshot 19. A list of items that corresponds to the category or keyword entered will appear. The list may include more than one page of results.

1. **CLICK** on the empty box to the left of the item/service description for every item or service for which you wish to receive bid notification. (We do not guarantee these will be put out to bid; however, getting on the appropriate list guarantees you will receive a bid if that item is solicited via a public bid.)
2. **SCROLL** to the bottom of the page and **CLICK** “Save and Add More” if there are additional pages to view. (Each page with selected categories must first be saved in order to retain your selections). The screen will refresh and you should be viewing the initial COMMODITY/SERVICE search screen. Additionally, the keywords you entered previously should still be in the search box.
3. **CLICK** “Search.” The categories will show again on your screen and you can then choose the next page you wish to view. You will need to repeat this process for categories on subsequent pages.
4. After all categories have been selected, **CLICK** “Save and Continue Registration” at the bottom of the page (see Screenshot 20 on the next page).



Screenshot 19



Screenshot of a web browser window titled "Sonoma County Purchasing - Commodity Codes - Microsoft Internet Explorer". The browser shows a list of commodity codes with checkboxes. A callout bubble points to the "Save and Continue Registration" button with the text: "CLICK 'Save and Continue Registration' after you have selected all commodities/services your company provides."

Commodity Code	Description
<input checked="" type="checkbox"/> 485-10	Brooms, brushes, and handles
<input checked="" type="checkbox"/> 485-11	Cleaner and Detergent, Paste and Tablets
<input checked="" type="checkbox"/> 485-12	Cleaner and Polish, Metal (For Brass, Stainless Steel, etc.)
<input checked="" type="checkbox"/> 485-13	Cleaner, Hand and Skin, Synthetic Detergent Type
<input checked="" type="checkbox"/> 485-14	Cleaner, Hand, Mechanics' Waterless
<input checked="" type="checkbox"/> 485-15	Cleaner and Polish, Plastic
<input checked="" type="checkbox"/> 485-16	Cleaner, Hard Surface, General Purpose, Liquid (Including Graffiti Removers) (See 630-45 for Painted Type Graffiti Removers)
<input checked="" type="checkbox"/> 485-17	Cleaner and Polish, Wood
<input checked="" type="checkbox"/> 485-18	Cleaner, Heavy Duty Degreaser (Including Oven Cleaner)
<input checked="" type="checkbox"/> 485-19	Cleaner/Remover, Lead-Based Debris
<input checked="" type="checkbox"/> 485-20	Cleaner and Polish for Marble, Masonry, Porcelain, etc.
<input checked="" type="checkbox"/> 485-21	Cleaner, Rust Remover
<input checked="" type="checkbox"/> 485-22	Cleaner, Sewer, Septic Tank, and Waste Pipe, Acid and Caustic Types (Incl. Drain Openers)
<input checked="" type="checkbox"/> 485-24	Cleaner, Sewer, Septic Tank, and Waste Pipe, Aerobic Bacteria and Fungi Type
<input checked="" type="checkbox"/> 485-25	Cleaner, Tile and Grout
<input checked="" type="checkbox"/> 485-26	Cleaner, Toilet Bowl, Granular and Liquid
<input checked="" type="checkbox"/> 485-27	Cleaner: Vinyl, Upholstery
<input checked="" type="checkbox"/> 485-28	Cleaner and Wax: Window, Mirror, and Glass

1-25 of 74
1 2 3

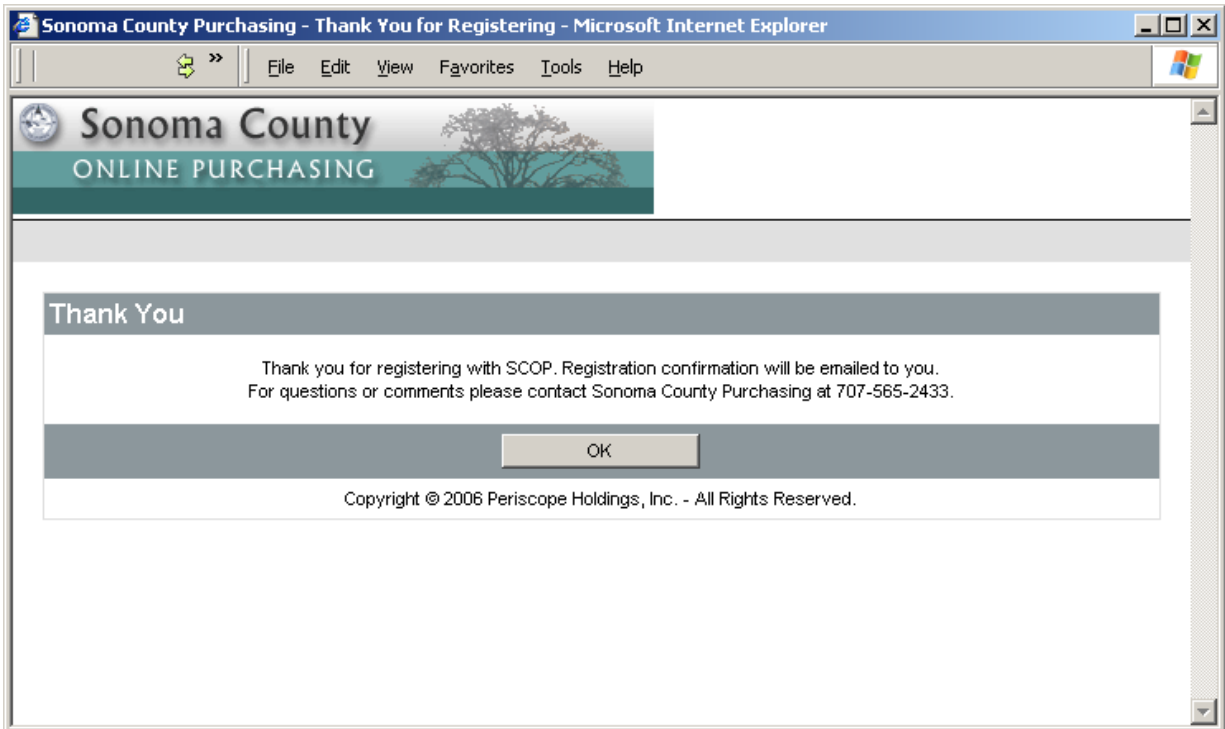
Save and Add More Save and Continue Registration Exit and Continue Registration

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Screenshot 20

CONGRATULATIONS! You have completed the Registration Process. We invite you to continue to explore SCOP, and its many features. We are very excited about this new tool (SCOP) and want you to be excited too!

To continue exploring SCOP, you will need to sign on using the Login ID and Password you created. **YOU NEED TO BE AWARE THAT** even though you have chosen a password during registration, SCOP considers that initial password to be temporary and will require you to change it the first time you sign in after registration.



Screenshot 21

ADDING USERS TO YOUR ACCOUNT: Instructions for adding additional users to your account can be found in the “Pre-Registered Vendors” instruction manual.

IMPORTANT: If you have any questions or problems while logging in to SCOP, please do not “Register” again. Please email SCVENDOR@sonoma-county.org or call (707) 565-2433 for assistance.