



PROCURE-2-PAY MANAGING BID OPPORTUNITIES

Update Notifications, Set Service Locations & Edit Classification Codes

Optimize your profile by setting your Notification preferences, adding your **Ship-to or Service Locations**, manage your **Products and Service Categories** with classification codes to ensure that your organization is able to take full advantage of the Procure-2-Pay (P2P) system notifications. Commodity or classification codes are codes used to identify products or services purchased or sold. Follow the steps below to receive notifications.

⇒ LOGIN

1. Go to www.sccprc.org/P2P and click **Login** to access your P2P account.

Login

⇒ SET YOUR NOTIFICATIONS PREFERENCES

You can specify which notifications you receive and where you would like them sent.

1. From the **Company Settings** menu, select **Notifications**.

2. This takes you to the **A) General** notifications tab, though you can also set **B) Network**, **C) Discovery**, or **D) Sourcing & Contracts** notifications by clicking on the corresponding tabs.

A General

B Network

C Discovery

D Sourcing & Contracts

Enter up to three comma-separated email addresses per field.

3. Click on the check box next to any notification you would like to receive.

4. Enter up to three email addresses, separated by commas, to specify who should receive each notification.

Type	Send notifications when...	To email addresses (one required)
Customer	<input checked="" type="checkbox"/> Send a notification when a buying organization creates a trading relationship with my company and when that buying organization publishes a new CSV invoice or service sheet template.	<input type="text"/>
Customer Requirements Change	<input checked="" type="checkbox"/> Send a notification when a customer has shared or updated Master Data or Business Requirements on my Supplier Information Portal	<input type="text" value="john@abccompany.com,natalie@abccompany.com,fredd@abccompany.com"/>
Collaborations Rule Change	<input type="checkbox"/> Send a notification when a customer changes his B2B collaboration rules.	<input type="text"/>
Trading Relationship Requests	<input type="checkbox"/> Send a notification when a customer responds to my trading relationship request.	<input type="text"/>
Supplier Enablement Activity and Task Reminder	<input checked="" type="checkbox"/> Send a notification when a supplier enablement activity is assigned or a task is overdue.	<input type="text"/>

5. Click **Save** after you are finished configuring your notification preferences.

6. Click **Close** to exit.



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⇒ SET YOUR SHIPT-TO OR SERVICE LOCATIONS

1. Click **Company Settings** and select **Company Profile** in the upper right-hand corner of the page.

Company Settings ▾ Lisa Adams ▾
GAME OF SCONES°.TEST
ANID: ██████████
Company Profile
Account Settings
Users
Notifications
View All

2. Select the **Basic** tab in the upper left-hand corner of the page.

Company Profile
Basic (4) Business (2) Marketing (3) Contacts

3. Scroll down to **Ship-to or Service Locations**. In the search box, type in “Santa Clara” and click on the suggested name “San Jose-Sunnyvale-Santa Clara— California”

Ship-to or Service Locations*
Enter the locations that your company ships to or serves. If you serve limited locations, enter the locations your company serves below services company might only serve the US, but a goods manufacturer may ship globally.
Santa Clara -or-
San Jose-Sunnyvale-Santa Clara - California Suggestions
Santa Barbara-Santa Maria-Goleta - California

4. After you click on the suggested name, you should see it populate under the search box.

Ship-to or Service Locations*
Enter the locations that your company ships to or serves. If you serve limited locations, enter the locations your company serves below services company might only serve the US, but a goods manufacturer may ship globally.
Enter Ship-to or Service Location -or-
San Jose-Sunnyvale-Santa ... x

5. Click **Save**.



PROCURE-2-PAY MANAGING BID OPPORTUNITIES

⇒ MANAGE YOUR PRODUCTS AND SERVICE CATEGORIES

Classifications can be selected or changed by A) searching using a keyword or B) browsing through the categories.

A) Keyword Search

1. Click **Company Settings** and select **Company Profile** in the upper right-hand corner of the page.

The screenshot shows a user menu for 'Lisa Adams'. The 'Company Settings' dropdown is open, and 'Company Profile' is highlighted with a red box and a mouse cursor. Other options include 'Account Settings', 'Users', 'Notifications', and 'View All'.

2. Select the **Basic** tab in the upper left-hand corner of the page.

The screenshot shows the 'Company Profile' page with four tabs: 'Basic (4)', 'Business (2)', 'Marketing (3)', and 'Contacts'. The 'Basic (4)' tab is highlighted with a red box.

3. Scroll down to **Products and Service Categories**. In the search box, type in the commodity or services your organization offers.

The screenshot shows the 'Product and Service Categories' search interface. The search box contains 'furniture'. A dropdown menu is open, showing suggestions: 'Baby and toddler furniture and accessories', 'Restaurant furniture', 'Office furniture' (highlighted with a red box and mouse cursor), and 'Furniture'.

The screenshot shows a suggested list for 'Office furniture'. The list includes: 'Furniture manufacturing services', 'Casegood or non modular managerial ...', 'Storage for panel systems', 'Organization for panel systems', 'Freestanding parts or accessories', 'Computer support storage accessories' (highlighted with a red box), 'Computer support organization', 'Computer support parts or accessories', and 'Furniture cleaners'. Each item has an 'Add' button next to it. Below the list, a search box contains 'Computer support work surfaces'.

4. A suggested list may appear for more detailed options. Click **Add** to add any of the suggestions. After you click on the suggested name, you should see it populate under the search box.

5. Click **Save**.



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B) Classification Code Search

1. Click **Company Settings** and select **Company Profile** in the upper right-hand corner of the page.

Company Settings ▾ Lisa Adams ▾

GAME OF SCONES*-TEST
ANID: ██████████

Company Profile

Account Settings

Users

Notifications

View All

2. Select the Basic tab in the upper left-hand corner of the page.

Company Profile

Basic (4) Business (2) Marketing (3) Contacts

3. Scroll down to **Products and Service Categories** and click **Browse**.

Product and Service Categories*

Enter the products and services your company provides. Postings made by buyers will be matched to you based on the product and service categories you enter below.

Add -or- **Browse**

4. Click the product and service category to show sub-categories. Select the product or service you want to add by clicking on the title and then click the + icon.

Browse Product and Service Categories Didn't find what you were looking for? Try Search »

Construction Materials >
Consumer Electronics & Appliances >
Creative Services >
Distribution & Conditioning Systems >
Drugs & Pharmaceuticals >
Education & Training Services >
Educational Supplies, Musical Instruments & Toys >

Advertising >
Graphic Design >
Photographic Services >
Professional Artists & Performers >
Reproduction Services >
Writing & Translations >

Art design services > **+**
Graphic display services > **+**

Art design or graphics **+**
Chart or graph design services **+**
Computer generated design services **+**
Layout or graphics editing services **+**
Package design services **+**
Photocomposition **+**
Silkscreen design services **+**

5. After you add a product or service, you should see it populate under **My Selections**. To delete selections, click the box next to the item you would like to delete and then click **Remove**.

My Selections (3)

Art design services (View)

Layout or graphics editing services (View)

Art design or graphics (View)

Remove

Tip: The key to selecting the correct products or service categories is to take sufficient time to explore the categories and only selecting categories that describe the business being classified.

Tip: The County recommends ongoing regular maintenance of your P2P account. Monitor your notifications to ensure that the bids that are received are accurate for what products or services your organization offers.

6. Click **OK** to save.