



Supplier Portal
Universal Training Guide

How to Register on the Portal

PeopleSoft eSupplier Connection
Version 9.2 PUM 26

Contents

Contents	2
1. Supplier Portal Overview	3
1.1 Registration Overview.....	3
1.2 Portal User Support	3
2. Bidder Registration (PlanetBids)	4
2.1 New Bidder Registration	4
3. Existing Supplier Registration	5
3.1 Existing Supplier Registration.....	5
4. New Supplier Registration	7
4.1 Becoming a Supplier.....	7
5. Complete A Registration in Progress	18
5.1 Continue From Where You Left.....	18
6. Log in to Portal Profile	20
6.1 Login to Portal Profile	20

1. Supplier Portal Overview

1.1 Registration Overview

The Supplier Portal is designed to help individuals or firms desiring to do business with the City navigate the City of Sacramento's (City) procurement process.

Registration and profile creation are required before Portal use can occur. To register on the Portal, first you need to identify what type of profile you should use. This will also identify the Training Guide sections you should refer to for help during your use of the Portal.

Bidder: An individual or firm that has never done business with the City.

Prospective Bidders must complete the New Vendor Registration through PlanetBids (<https://www.planetbids.com/portal/portal.cfm?CompanyID=15300>) to obtain official City Event documents and to receive emails concerning any changes to an Event.

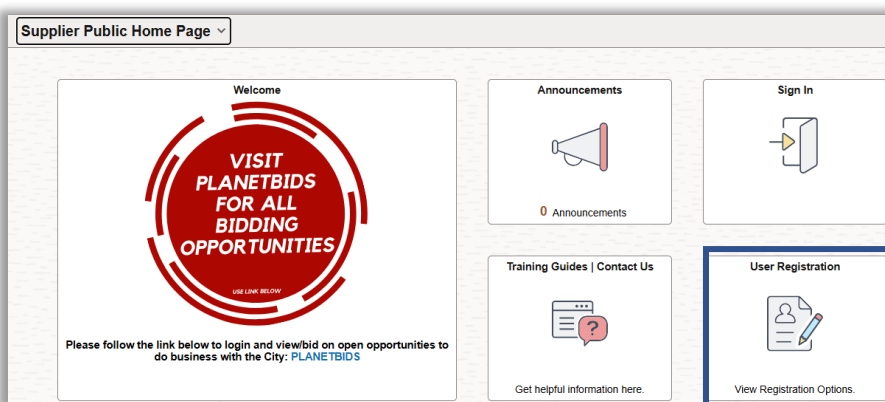
Supplier: An individual or firm that is currently doing business with the City or has previously done business with the City. Those doing business with the City can maintain their City profile at: <https://ebids.cityofsacramento.org>

1.2 Portal User Support

Planetbids: (818) 992-1771 between 7am and 5pm PST

General Support FAQ: <https://solutions.planetbids.com/vendor-support>

City's Supplier Portal for Current Suppliers: Contact your City department representative or contract manager for supplier registration assistance.



2. Bidder Registration (PlanetBids)

2.1 New Bidder Registration

Businesses qualify as Bidders if they are an individual or firm that has never done business with the City.

STARTING BIDDER REGISTRATION

Bidders must self-register on [PlanetBids](https://www.planetbids.com/portal/portal.cfm?CompanyID=15300). The City eBid Portal will redirect all New Bidders to PlanetBids.

In the Login section, if the **New Bidder Registration** link is clicked, the below pop up will provide the appropriate link to PlanetBids:

<https://www.planetbids.com/portal/portal.cfm?CompanyID=15300>

User Registration

Bidder Registration



Select this option if you have never done business with City of Sacramento

[More...](#)

[Register now](#)

Add New User



For approved suppliers only - Register a User(s) who conducts business on behalf of the approved supplier with the City of Sacramento.

[More...](#)

[Register now](#)

Bidder Registration Information

Formal solicitations for the City of Sacramento are now listed on PlanetBids. Please visit below site and register as a vendor to view and bid on open opportunities.

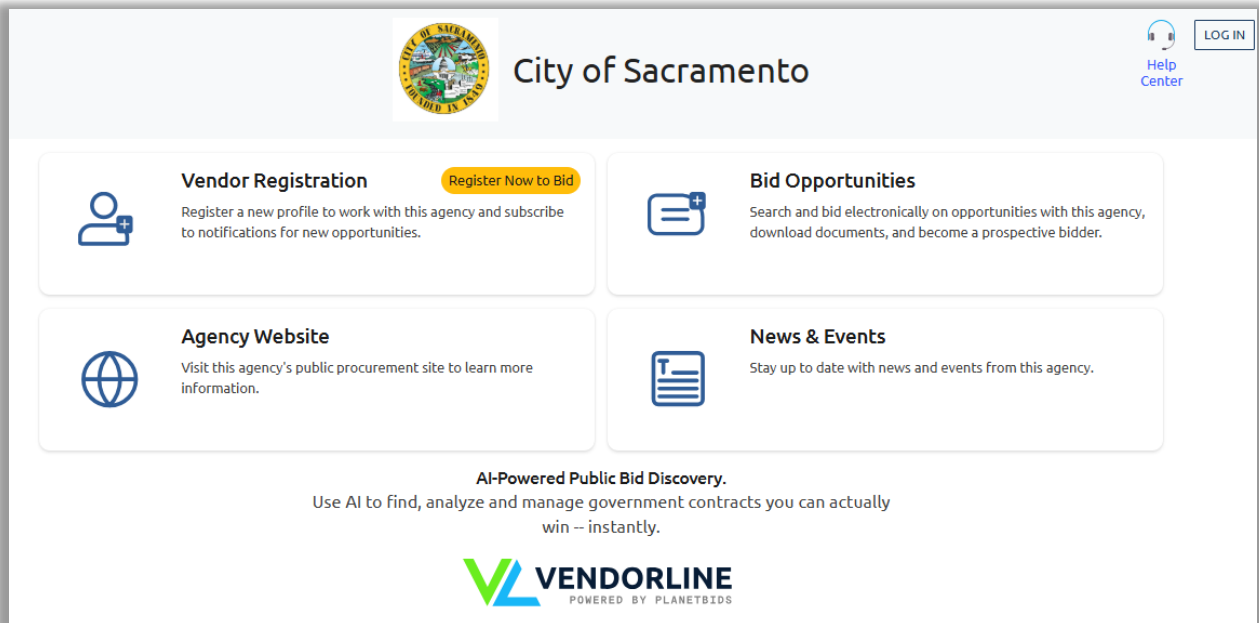
<https://www.planetbids.com/portal/portal.cfm?CompanyID=15300>

[OK](#)

PlanetBids welcome page for the City of Sacramento Vendor Portal:

Note: the PlanetBids Portal should say City of Sacramento at the top.

Users will click the **New Vendor Registration** button.



3. Existing Supplier Registration

3.1 Existing Supplier Registration

Individuals and businesses that are already working with the City of Sacramento will have a City Issue ten-digit Supplier ID. i.e. 0000012345.

If you do not know your City Issued Supplier ID, email your Department contact.

To begin the existing supplier registration, please visit <https://ebids.cityofsacramento.org> and click the **Existing Supplier Registration** link.

User Registration

Bidder Registration

Select this option if you have never done business with City of Sacramento

More...

Register now

Add New User

For approved suppliers only - Register a User(s) who conducts business on behalf of the approved supplier with the City of Sacramento.

More...

Register now

You will be prompted to fill out Supplier List information, User Account Information, and Terms and Conditions.

Supplier List

1. Enter the City Issued **Supplier ID**, ten digits i.e. 0000012345
2. Enter the **Tax Identification Number** **without** the hyphen. i.e. 123456789

Supplier List

*Supplier ID Tax Identification Number

User Account Information ?

* Requested User ID

Description

* Email ID

Language Code

Time Zone

Currency Code USD

Terms and Conditions

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

☐ Click to accept the Terms of Agreement below.

[Terms of Agreement](#)

Submit Cancel

User Account Information

1. Enter the **Requested User ID** for the new contact. This will become the new contact's User ID to login to the Portal. The User ID will be emailed to the contact upon successful registration.
2. Enter the **Description** (Brief Business Description).
3. Enter the **Email ID** for the profile.
4. Select the preferred Language Code from the Drop-Down List.
5. Select the **Time Zone** from the Drop-Down List.
6. Select the preferred **Currency Code** from the Drop-Down List.

Terms and Conditions

1. Click on the **Terms of Agreement Link** to review the City's Terms of Agreement for using the Supplier Portal.
2. Click on the **Return Button** to go back to the previous page.
4. Click the box labelled **Click to accept the Terms of Agreement below**.
5. Click the **Submit Button**.

You will see a message that states, "User Account has been created". Click the **OK Button**.

4. New Supplier Registration

4.1 Becoming a Supplier

A Supplier Profile can be created if:

- You have won an informal or formal bid
- You are a new Sole / Single Source supplier for the City
- Your business now has a new Tax ID.

You will be sent a unique link to Register as a Supplier with the City of Sacramento by your Department contact. Using this unique link will provide for a seamless registration process.

STARTING NEW SUPPLIER REGISTRATION

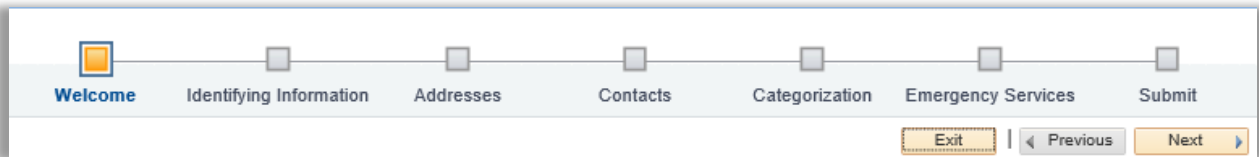
You will receive an email from your Department contact containing similar language as listed below:

Please use the following link to self-register on our website: [Register as Supplier](#).

In the email you receive, the [Register as Supplier](#) language will be a clickable link that will allow for direct registration. This link can only be obtained from your Department contact.

Click the Register as Supplier link to begin.

A progress bar is shown at the top of each screen so that you can track what step you are on during the registration process.



Step 1 of 7: WELCOME

The form will default to “**Start a new registration form**” then answer the following questions:

1. Answer *What type of entity do you represent?*
 - a. To register as a business, click on the **Business Option**.
 - b. To register as an individual, click on the **Individual Option**.
2. Answer *What type of bidding activities you are interested in?*
 - a. If you are only interested in buying Goods and/or Services from the City, click on the **Buying goods/Services Option**.
 - b. If you are only interested in selling Goods and/or Services to the City, click on the **Selling goods/Services Option**.

- c. If you are interested in both buying Goods and/or Services from the City and selling Goods and/or Services to the City, click on the **Both Option**. This is the default option.
3. Click the **Next Button** to proceed to the next Step in the registration process.

City of
SACRAMENTO

Welcome Identifying Information Addresses Contacts Categorization Emergency Services Submit

Exit Previous Next

Welcome - Step 1 of 7

Select an activity below: ?

☒ Start a new registration form

What type of entity do you represent?

☒ Business
☐ Individual

What type of bidding activities you are interested in?

☐ Buying goods/Services
☒ Selling goods/Services
☐ Both

☐ Continue from where you left

Exit Previous Next

* Required field

Step 2 of 7: IDENTIFYING INFORMATION

Unique ID & Company Profile

1. Enter your 9-digit **Tax Identification Number**, either a Federal Employer Identification Number (EIN) or Social Security Number (SSN), whichever applies.
Use the following format with no spaces or dashes: 123456789

PLEASE NOTE: The system will only allow a Tax Identification Number to be registered once.

2. Enter your legally registered business **Entity Name** as it appears on your Federal W-9 form.

3. If the name under which you operate your business is different from its legal, registered name (a.k.a. “doing business as”), enter the operating name under **Additional Name**.
4. If applicable, enter your business **Website** address.
 - a. After entering your website address, it is recommended that you click on the **Open URL Link** to verify that the link to your website works correctly.

You have completed the Unique ID & Company Profile. Scroll down to complete the Profile Questions.

Register Suppliers **Identifying Information**

Welcome Identifying Information Addresses Contacts Categorization Emergency Services Submit

Exit Save for Later Previous Next

Identifying Information - Step 2 of 7

Please enter identifying information about your company.

Unique ID & Company Profile ?

* Tax Identification Number

* Entity Name

Website [Open URL](#)

Profile Questions

**Tax documents are required. You must attach the W9 and one of the following:
590 Form / 587 Form / W-8BEN / W-8BENE**

1. In the W9 Form section, click on the **Add Attachment** link to attach a signed and completed **IRS Federal W9**. A link to the blank W9 form is available in this section.
2. Review the options for the **California Withholding Form (CA590 or CA587)** and **Foreign Withholding Form (W-8BEN or W-8BENE)**. Complete, sign and upload the appropriate document.

Profile Questions ?

A W9 form will be required to be completed and submitted to the City of Sacramento upon receipt of an award notification. A blank W9 form can be obtained at: [W9](#)

[Add Attachment](#) 

A California 590 form will be required to be completed and submitted to the City of Sacramento upon receipt of an award notification for businesses in state. A blank California 590 form can be obtained at: [590 Form](#)

[Add Attachment](#) 

A California 587 form will be required to be completed and submitted to the City of Sacramento upon receipt of an award notification for businesses out of state. A blank California 587 form can be obtained at: [587 Form](#)

[Add Attachment](#) 

A W-8BEN form will be required to be completed and submitted to the City of Sacramento upon receipt of an award notification for the foreign individuals: A blank W-8BEN form can be obtained at: [W-8BEN](#)

[Add Attachment](#) 

A W-8BEN E form will be required to be completed and submitted to the City of Sacramento upon receipt of an award notification for foreign entities. A blank W-8BEN E form can be obtained at: [W-8BENE](#)

[Add Attachment](#) 

To attach any of the tax documents, click on the **Add Attachment** link, click upload then browse to choose the attachment, and upload the document. Lastly, you will add the attachment description and then click Return to move on to the next section.

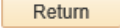
Profile Attachments 

Attachments

[Personalize](#) | [Find](#) |  

First  1 of 1  Last

Attached File	Attachment Description	Upload	View		
1590_-_City_of_Sacramento.pdf		 Upload	 View		



After all appropriate documents are uploaded, click the **Next Button** to proceed to the next registration page.

Step 3 of 7: ADDRESSES

Primary Address

Provide the following information for the main business address.

1. Enter the **Country**, **Street Address**, **City**, **County**, **Postal Zip Code**, **State** and **Email ID**.

It is recommended that you provide a general company email address or a company procurement/sales group email address here. A contact specific email will be added later in Step 4: Contacts.

Other Addresses

If your business has multiple locations where different business functions occur, provide the applicable information for the following functions.

1. **Bill To Address:** If your business has an address for rendering payment that is different from your Primary Address, click on the **Bill To Address Checkbox** and fill out the applicable fields.
2. **Ship to Customer:** If your business has an address for shipping Goods that is different from your Primary Address, click on the **Ship To Customer Checkbox** and fill out the applicable fields.
3. **Invoice Address:** If your business has an address from which you send Invoices that is different from your Primary Address, click on the **Invoice Address Checkbox** and fill out the applicable fields.

Addresses - Step 3 of 7

Please complete the address information for your company.

Primary Address ?

* Country  United States

Address 1

Address 2

Address 3

City

County Postal

State 

Email ID

Other Addresses ?

Check boxes below to indicate addresses that are different from your Primary Address above:

☒ **Bill To Address**
Address for remitting payment

* Country

Address 1

Address 2

Address 3

City

County Postal

State 

Email ID

☐ **Ship To Customer**
Address for shipping goods/service

☐ **Invoice Address**
Address from which you send invoice

Click the **Next Button** to proceed to the next registration page.

Step 4 of 7: CONTACTS

Provide a list of business contacts. A User ID and system generated Password can be created for each new contact added so they can access the Profile. Multiple contacts can be associated with your profile.

However, only one of those contacts can be designated as the Primary Contact. The Primary Contact is the only contact that will be contacted regarding Profile information changes and receive Event notifications.

PLEASE NOTE: Information in your Profile can be revised by any of the profile contacts with login access to the Portal. As such, you may want to limit access to your profile.

Home Contacts

Welcome Identifying Information Addresses **Contacts** Categorization Emergency Services Submit

Exit Save for Later Previous Next

Contacts - Step 4 of 7

Please enter the contact information for your user profile(s).

Company Contacts ?

You have not added any contact information to your application. Click "Add Contact" button to add new contact information.

Add Contact

* Required field

Exit Save for Later Previous Next

To add a new business contact, click on the **Add Contact Button** and enter the appropriate contact information.

Add Contacts

Contact Information ?

* First Name ☒ Primary Contact

* Last Name

Title

* Email ID

* Telephone Ext

Fax Number

Contact Type

User Profile Information ?

* Requested User ID

Description

Language Code

Time Zone

Currency Code

User Profile Information

1. Enter a **Requested User ID** for the contact. This will become the contact's User ID to login to their Profile on the Supplier Portal. User ID will be emailed to the Primary Contact upon successful registration.
2. Enter a **Description** (Nickname for the Contact for easy recognition).
3. Select the contact's preferred **Language Code** from the Drop-Down List.
4. Select the contact's **Time Zone** from the Drop-Down List.
5. Select the contact's preferred **Currency Code** from the Drop-Down List.
6. Click the **OK Button**.

PLEASE NOTE: The User Profile Information section contains User ID selection but does not contain password selection for login to the Profile. Once registration is complete, the contact will receive an email that contains a system generated password. Upon first login, it is recommended that each user change their password.

To add additional contacts, Click the **Add Contact** button and fill in the appropriate information for the profile.

Once you have added all desired contacts, click the **Next Button** to proceed to the next registration page.

Step 5 of 7: CATEGORIZATIONS

Identify the buying or selling categories for Goods and/or Services that you would like associated with your business.

You can find categories using one of two methods, Search Text or Manual Selection.

Search Text

1. Enter desired keyword (text or category number) in **Search Text**.
2. Click the **Search Button**. All entries matching the keyword will appear in a list.

Manual Selection

1. List can be sorted by **Category** or **Description**.
 - a. Ascending – Click once on desired sort type
 - b. Descending – Click twice on desired sort type
2. Manually scroll through the list and click the box for all applicable categories.

Once you have added all desired categories, click the **Next Button** to proceed to the next registration page.

Step 6 of 7: EMERGENCY SERVICES

Select the categories for which your business can provide Goods and/or Services to the City in an emergency. These Goods and/or Services will typically need to be provided to the City upon short notice and possibly during non-business hours.

Emergency Services

Welcome Identifying Information Addresses Contacts Categorization **Emergency Services** Submit

Exit Save for Later Previous Next

Emergency Services - Step 6 of 7

Please select the categories for which your company can provide goods and services to the City in an emergency purchase
Select to add or de-select to remove categories applicable to your business

Search Text Search

Category Search Results		
Select	Category	Description
☐	11510	Biochemicals
☐	12021	Boats & Accessories
☐	15010	Building Supplies
☐	1539	Copy Machine Supplies
☐	16507	Kitchen/Cafeteria Equipment
☐	17513	Chemical Lab Eqpt & Supplies
☐	19036	Chemicals & Solvents

My Categories

Delete	Category	Description
Delete		

PLEASE NOTE: If you are willing to provide emergency Goods and/or Services for a category that you already selected in Step 5: Categorizations, you will still need to select that category again here in Step 6 to tag it as available for emergency purchase.

Once you have added all desired Emergency Service categories, click the **Next Button** to proceed to the next registration page.

Step 7 of 7: SUBMIT

The field for **Email communication** will default to the Email ID provided under the Primary Address header in the Step 3: Addresses. If you would like the registration information to be sent to another contact, provide the new email address.

PLEASE NOTE: This email address is for receiving registration information only.

Before submitting your registration, you are required to read and agree to the Supplier Portal Terms of Agreement.

To review all entered information prior to submitting, click the **Review** button to begin the review process.

Once registration has been reviewed and completed, click **Submit**.

The screenshot shows the 'Submit' step (Step 7 of 7) of a registration process. At the top, there is a navigation bar with a '< Home' button on the left and a 'Submit' button on the right. Below this is a progress bar with seven steps: Welcome, Identifying Information, Addresses, Contacts, Categorization, Emergency Services, and Submit. The 'Submit' step is highlighted with a yellow square. Below the progress bar, there are four buttons: 'Exit', 'Save for Later', 'Previous', and 'Next'. The main content area is titled 'Submit - Step 7 of 7'. It contains the following text: 'Please review and submit your registration information. Click the "Review" button to review the registration information. Click the "Submit" button to submit your registration after reviewing and accepting following Terms of Agreement.' Below this, it says 'Email communication regarding this registration will be sent to:' followed by a text input field containing 'jsmith@abcsupplies.com'. There is a 'Terms and Conditions' section with a question mark icon. It contains the text 'Make sure you read terms of agreement fully before submitting your registration.' and a checked checkbox with the text 'Click to accept the Terms of Agreement below.' Below the checkbox is a link 'Terms of Agreement'. At the bottom of the main content area, there are two buttons: 'Review' and 'Submit'. At the very bottom of the page, there are four buttons: 'Exit', 'Save for Later', 'Previous', and 'Next'.

PLEASE NOTE: If you need to complete your profile at a later time, you can use the **Save for Later** button. Clicking this button will prompt an email to be sent with your Registration ID. You will be prompted to verify the email address that the registration ID will be sent to first.

5. Complete A Registration in Progress

5.1 Continue From Where You Left

If you previously tried to register in the Supplier Portal but did not complete your registration and selected the **Save for Later Button**, follow the steps below:

1. **Click** the link originally provided to you by the City of Sacramento when you were invited to Register as a Supplier. If this link is unavailable, click the following link to proceed: [Continue From Where You Left](#)

2. On the Welcome screen, click on the **Continue from where you left** Option.

Welcome - Step 1 of 7

Select an activity below: ?

☒ Start a new registration form

What type of entity do you represent?

☒ Business
☐ Individual

What type of bidding activities you are interested in?

☐ Buying goods/Services
☐ Selling goods/Services
☒ Both

☐ Continue from where you left

* Required field

You will be asked for your Registration ID and the Tax Identification Number for the Business/Individual.

☒ Continue from where you left

* Registration ID

0000074

* Tax Identification Number

123123123

[Forgot your registration ID?](#)

If you know your Registration ID:

Reply Reply All Forward IM
Wed 7/18/2018 10:37 AM

PortalHelp@cityofsacramento.org
In-Progress Registration Form Has Been Saved

To: jsmith@abcsupplies.com
Reten Expires 7/3/2020

Your In-Progress registration form has been saved. To resume your registration you will need your registration ID: 0000074 and your TIN when you return to the portal.

If you have any questions or feedback regarding your registration ID 0000074, please call the Procurement Services Division at (916)808-6240 or email Procurement-All@cityofsacramento.org.

Thank you,
City of Sacramento

If you know your Registration ID or have the email with your Registration ID, follow the steps below:

1. Using the information from the Save for Later email, enter your **Registration ID**
2. Once you have entered your registration ID, the system will request another piece of information. Enter your **Tax Identification Number**.

The system will now display the registration page in the Supplier Portal that you were on when you selected the **Save for Later Button**.

If you forgot your Registration ID

If you do not know your Registration ID or do not have the email with your Registration ID, follow the steps below:

1. Click on the **Forgot your registration ID? Link**.

The screenshot shows a web application interface. On the left, a sidebar titled 'Welcome - Step 1 of 7' contains a section 'Select an activity below:' with three radio button options: 'Start a new registration form', 'What type of bidding activities y' (with sub-options 'Buying goods/Services', 'Selling goods/Services', and 'Both'), and 'Continue from where you left' (which is selected). Below these options are links for '* Registration ID' and 'Forgot your registration ID?'. The 'Forgot your registration ID?' link is highlighted with a blue box. The main content area is titled 'Forgot Registration ID' and contains instructions: 'Enter registration communication email ID and last 4 digits of the ID Type of your choice, then click on the "Look It Up" button.' Below the instructions are three input fields: '* Email ID' (text), '* ID Type' (dropdown menu), and '* Last 4 Digits of ID' (text). At the bottom of the main area are two buttons: 'Return' and 'Look It Up'. The footer of the form includes a legend '* Required field' and navigation buttons 'Exit', 'Previous', and 'Next'.

2. Fill in the requested information and click **Look it Up**. You will receive a message stating that an email with your Registration ID was sent to the applicable email address. Click the **Return Button** to return to the registration page.
3. Retrieve your email and follow the steps above for **If you know your Registration ID**.

6. Log in to Portal Profile

6.1 Login to Portal Profile

Upon successful registration as a Bidder, Existing Supplier, or New Supplier, you can sign in to your new Profile from the Supplier Portal Homepage.

The Primary Contact will receive an email with a temporary password to log in to the portal.

1. **Visit** the Supplier Portal: <https://ebids.cityofsacramento.org>

2. In the Login Section:

- a. Enter your **User ID**.
- b. Enter your temporary **Password** from the user creation request confirmation email.
- c. Click on the **Sign In Button**.



Login

User ID

Password

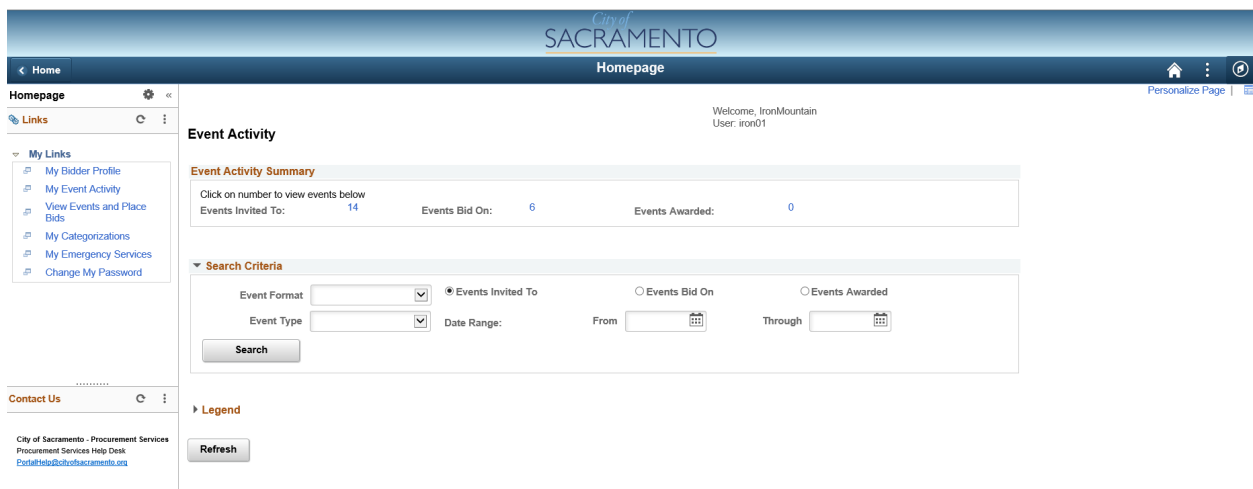
Sign In

[Forgot Password ?](#)

 **Register as a Sourcing Bidder**
Click here to register as a bidder and to be able to bid on events.

 **Create New User Accounts**
Click here to Register a New User to an existing Supplier account

3. Upon successful login, the Profile Homepage will display.



City of SACRAMENTO
Homepage

Welcome, IronMountain
User: iron01

Event Activity

Event Activity Summary

Click on number to view events below

Events Invited To:	Events Bid On:	Events Awarded:
14	6	0

Search Criteria

Event Format: ☒ Events Invited To ☐ Events Bid On ☐ Events Awarded

Event Type: Date Range: From Through

Search

Legend

Refresh

City of Sacramento - Procurement Services
Procurement Services Help Desk
PortalHelp@cityofsacramento.org

For more information on how to use the options on your homepage and how to manage your Profile, see the **Profile Management Training Guide** on the Portal Homepage.