City of SACRAMENTO

Procurement Portal
Universal Training Guide

How to Register on the Portal

PeopleSoft eSupplier Connection
Version 9.2 PUM 26

Contents

1. Procurement Portal Overview

1.1 Registration Overview

The Procurement 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 Procurement Portal for Current Suppliers: PortalHelp@cityofsacramento.org

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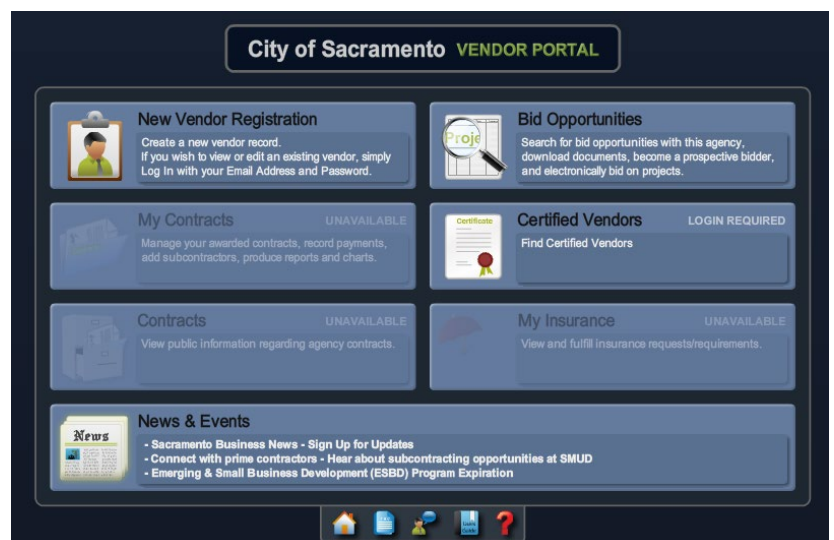https://www.planetbids.com/portal/portal.cfm?CompanyID=15300

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 or PortalHelp@cityofsacramento.org

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

Login

User ID [   ]

Password [   ]

[Sign In]

Forgot Password ?

New Bidder Registration

Existing Supplier Registration

Portal Training Guides

1. How to Register on the Portal. Click Here

2. Getting Started: Introduction to the Portal. Click Here

3. How to Maintain your Portal Profile. Click Here

4. How to View and Respond to City Events. Click Here

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 ⑦

* 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 Procurement 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**.

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]

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.** Email questions to portalhelp@cityofsacramento.org.*

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.
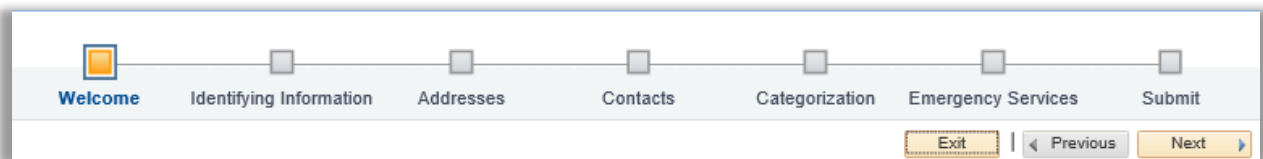
Step 1 of 7: WELCOME

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.

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. If your business has more than one location that will be participating in the online bid process, please contact Procurement Staff via PortalHelp@cityofsacramento.org

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.

Profile Questions

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

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.

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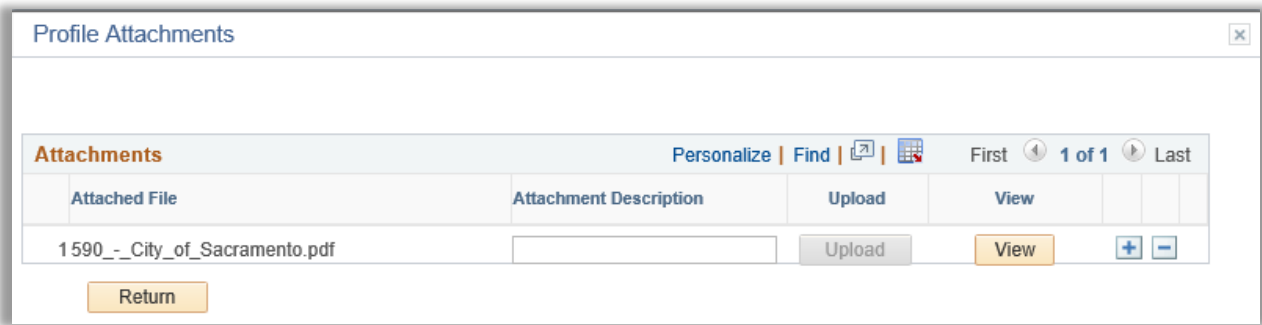
After all appropriate documents are uploaded, click the **Next Button** to proceed to the next registration page.

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	USA 🔍 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	USA United States
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.

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

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 Procurement 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.

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 Procurement 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**.

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 Procurement 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: ⑦

◉ 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

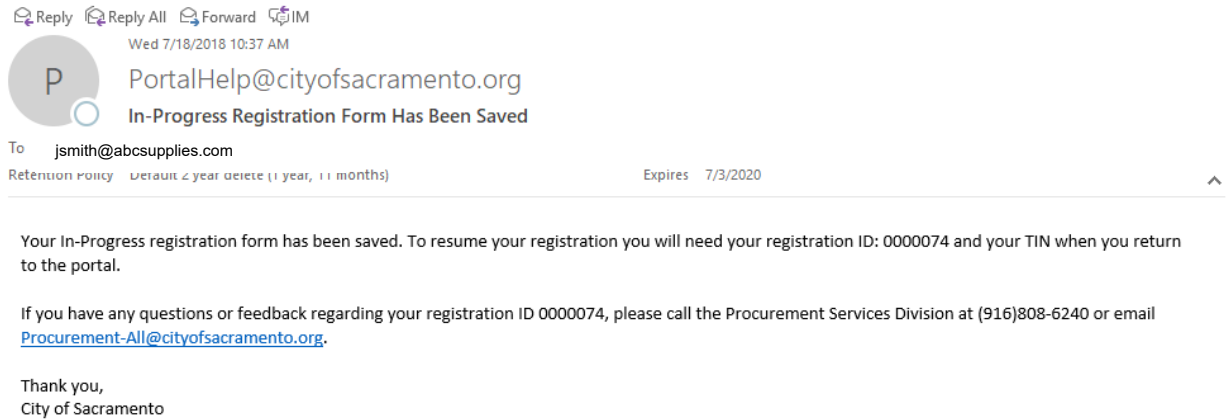○ Continue from where you left

* 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:

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 Procurement 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.

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 Procurement Portal Homepage.

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

1. **Visit** the Procurement 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**.

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

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.