

*City of*  
**SACRAMENTO**

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Procurement Portal  
Universal Training Guide

# Profile Management

**PeopleSoft eSupplier Connection**  
Version 9.2 PUM 17

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# 1. Procurement Portal Overview

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## 1.1 Profile Overview

The Procurement Portal is designed to help individuals or firms doing business with the City of Sacramento (the City), navigate the City's procurement process. It allows you to manage your business/individual information for Goods and Services with the City.

The Procurement Portal is the point of entry for Suppliers currently doing business with the City. Registration and profile creation are required to access the Portal. Reach out to the department you are working with to request a link to begin registration.

Various profile activities are performed within the Procurement Portal including:

### **Profile Management**

#### ➤ **Supplier**

- Self-manage Supplier Profile
- Register multiple User Accounts under one Supplier Profile
- Update Supplier Profile information via a Supplier Change Request
- Search and Review current and past Purchase Orders, Invoices, and Payments

This Profile Management Training Guide outlines the steps needed to successfully manage your Supplier profile on the Portal.

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## 1.2 Accessing the Portal

Once Registered, to Maintain your Business Profile, navigate to the Procurement Portal website at: <https://ebids.cityofsacramento.org>

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## 1.3 Portal User Support

In addition to this Profile Management Training Guide, the City of Sacramento has also created a Portal Registration Training Guide that will walk you through how to register on the Portal Procurement Portal.

Additional questions about the City's Procurement Portal shall be addressed to:

City of Sacramento, Procurement Services Help Desk

Email: [PortalHelp@cityofsacramento.org](mailto:PortalHelp@cityofsacramento.org)

## 1.4 Login to Profile

To Login to a Bidder or Supplier Profile:

1. Navigate to the Procurement Portal website at: <https://ebids.cityofsacramento.org>
2. In the Login Section, enter your **User ID**.
3. Enter your **Password**. If you are using a temporary password provided by the City, please Change your Password once logged in.
4. 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

### Forgot Password?

If you have forgotten your password, follow the steps below:

1. In the Login Section, enter your **User ID**.
2. Click on the **Forgot Password? Link**.
3. When the Supplier Login Screen appears, click on the **Send Button**.

**Supplier Login**

**Reset and Send Forgotten Password**

Enter your UserID and click send to reset your password and have it sent to you via email.

\*User ID

**Send**

1. System will confirm that your password reset was successful. Click on the **OK Button**.
2. Check your email for the new temporary password. Login to the Portal and reset your password.

**Supplier Login**

**Password reset successful.**

Your password has been reset and sent to your E-mail address.

Click the "OK" button to return to the homepage.

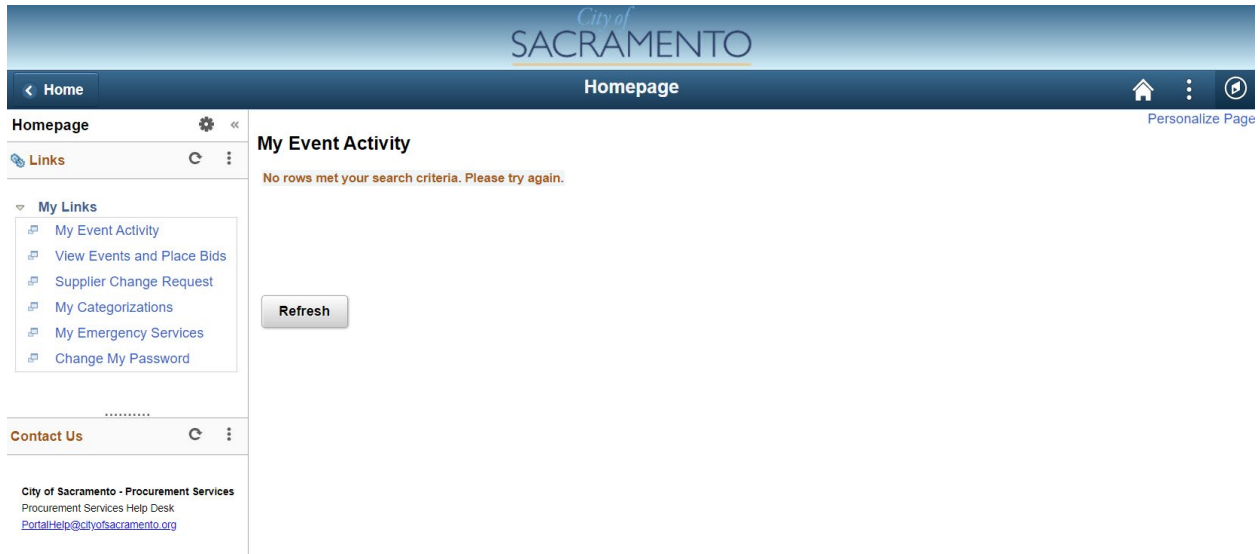
**OK**

### Forgot User ID

If you have forgotten your User ID, please contact Procurement Staff via [PortalHelp@cityofsacramento.org](mailto:PortalHelp@cityofsacramento.org)

## 2. Supplier Profile

### 2.1 Supplier Profile Homepage



This is the default Supplier Profile Homepage view. Here you can maintain your Profile. The Supplier Profile Homepage also includes the following sections in the Left Menu:

#### **LINKS**

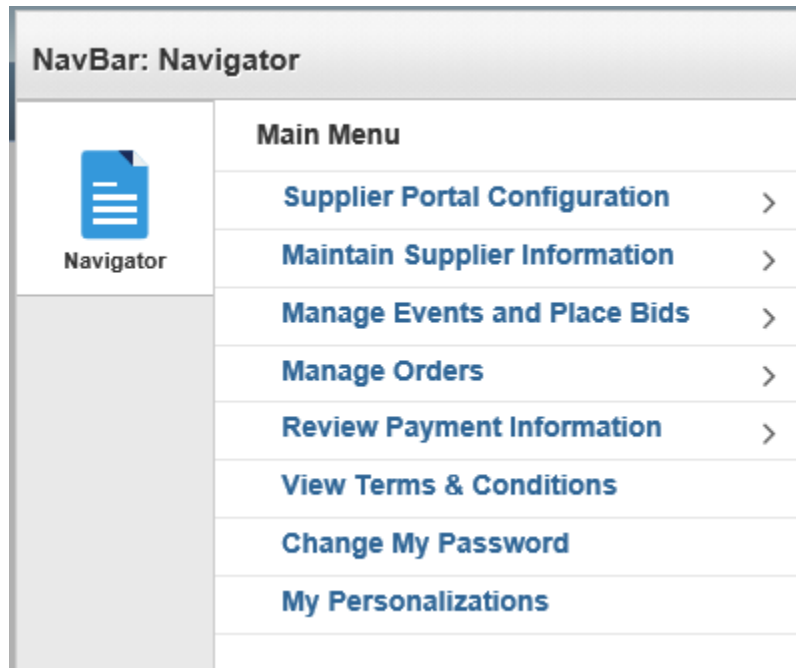
Left-side Menu - Displays pages available for the Supplier to use in maintaining their Supplier Profile including:

- *My Event Activity* – (not currently in use)
- *View Events and Place Bids* – Visit the link on the Log-in/Welcome page for all bidding opportunities
- Supplier Change Request
- My Categorizations
- My Emergency Services
- Change My Password

#### **CONTACT US**

Left-side Menu - Displays the contact information for Procurement Portal Support

To begin navigating of right-side menu  
Start by clicking the compass on the top right of the page to bring up the  
NavBar: Navigator Main Menu



## LINKS

Right-side Menu - Displays pages available for the Supplier to use in maintaining their Supplier Profile including:

- Supplier Portal Configuration – “Supplier Homepage” returns you back to main page
- Maintain Supplier Information – Similar to Supplier Change Request, use left-side menu
- *Manage Events and Place Bids* – (not currently in use) Visit the link on the Log-in/Welcome page for all bidding opportunities
- Manage Orders
- Review Payment Information
- View Terms & Conditions
- Change My Password
- My Personalization

## 2.2 Adding a New User Account to a Supplier Profile

Supplier Profiles allow for two types of Contacts.

- Contacts that create a User Account can login to the system and edit the Supplier Profile.
- Contacts that are added using the Supplier Profile Contact section are only available to select for receiving notifications and cannot login to the system. See section 3.3 Supplier Change Request step 3: Contacts for more information.

**PLEASE NOTE:** Information in your Supplier 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 User Account that will have access to edit the Supplier Profile:

1. Navigate to the Procurement Portal at: <https://ebids.cityofsacramento.org>
2. In the Login section, click on **Existing Supplier Registration Link**.

**Login**


User ID


Password

**Sign In**

[Forgot Password ?](#)

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 [New Bidder Registration](#)

 [Existing Supplier Registration](#)

Provide the following information to create a new User Account associated with your Supplier Profile.

**Supplier List**

1. Enter the **Supplier ID**. (Department personnel can provide this number for you)
2. Enter the **Tax Identification Number**.

**User Account Information**

1. Enter the **Requested User ID** for the new contact. This will become the new contact's User ID for login to their User Account under the Supplier Profile on the Procurement Portal.
2. Enter the **Description** (Nickname for contact for easy recognition of User).
3. Enter the **Email ID** for the new contact.
4. Select the preferred **Language Code** for the new contact from the Drop-Down.
5. Select the **Time Zone** for the new contact from the Drop-Down List.
6. Select the preferred **Currency Code** for the new contact from the Drop-Down List.



**Supplier List**

*Supplier ID	Tax Identification Number	
<input type="text"/>	<input type="text"/>	

**User Account Information** <sup>?</sup>

\* Requested User ID

Description

\* Email ID

Language Code

Time Zone

Currency Code

**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](#)

## Accept 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. Scroll and read through the Procurement Portal Terms of Agreement.
3. Click on the **Return Button** to go back to the previous page.
4. Click on the **Click to accept the Terms of Agreement below Option**.
5. Click the **Submit Button**.
6. You will see a message that states, "User Account has been created". Click the **OK Button**.

**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

**Terms of Agreement****General Disclaimer:**

Information presented on this website is collected, maintained, and provided for the convenience of the user. While every effort is made to keep such information accurate and up-to-date, the City of Sacramento does not certify the authenticity of any information that is provided on this website. Under no circumstances will the City of Sacramento be liable for any actions taken or omissions made from reliance on any information contained herein from whatever source nor will the City be liable for any other consequences from any such reliance

**Conditions of Use:**

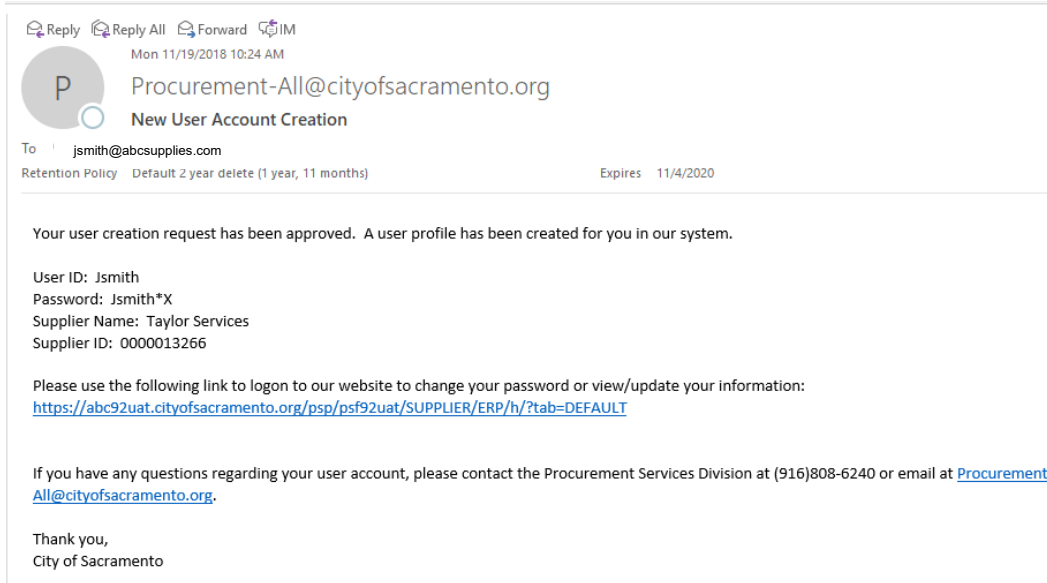
By visiting the City of Sacramento website, users agree that they will not use the site for any unlawful activity, or use it in any way that would violate the terms and conditions of use. This website is governed and construed by the laws of the State of California. Any use of the website shall comply with all Sacramento City and California laws and regulations as well as with all federal laws and regulations. Unauthorized attempts to upload information or change information on this website are strictly prohibited and may be punishable under state law and federal statutes including the Computer Fraud and Abuse Act of 1986 and the National Information Infrastructure Protection Act. We monitor network traffic to identify unauthorized attempts to upload or change information or to otherwise cause damage to the City's website. Anyone using this Web site expressly consents to such monitoring.

**User Account Confirmation Email**

Two separate confirmation emails will be sent to the new user.

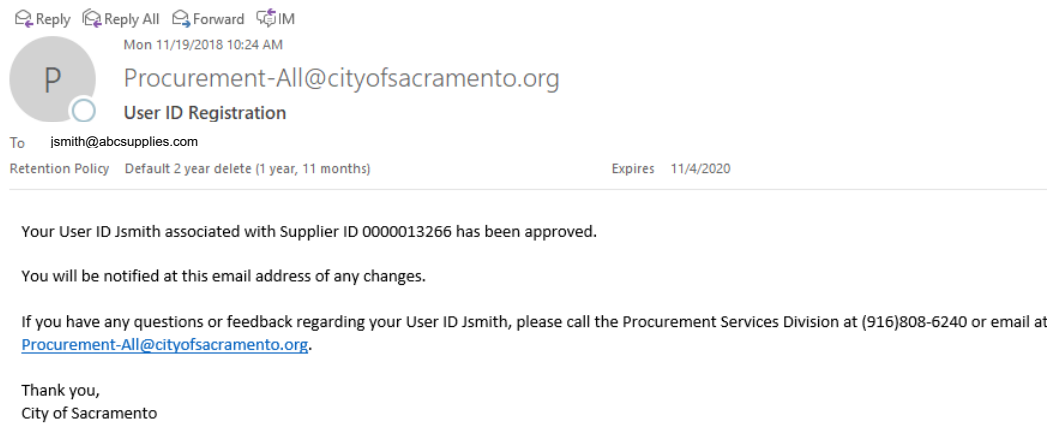
New User Account Creation – Email confirms that your user creation request has been approved. With the following information:

- a. User ID - User selected User ID
- b. Password – System generated password that the user will need to change
- c. Supplier Name – Business Name
- d. Supplier ID – System generated Supplier ID



New User Account Approval – Email confirms that your new user account has been associated with the Supplier and has been approved.

- a. User ID – User selected User ID
- b. Supplier ID – System generated Supplier ID



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## 2.3 Supplier Change Request

Certain changes to a Supplier Profile such as financial and tax information can affect legal requirements and City business processes. As such, certain changes made to a Supplier's Profile must be sent to the City in the form of a Supplier Change Request for City review and approval prior to the change being made in the Supplier's Profile.

**PLEASE NOTE:** Any contact associated with your Supplier Profile that has a User Account can make changes to your Supplier Profile.

Once a Supplier Change Request is received by the City, the request will typically be reviewed and approved by City staff within 24 hours. Notification of change request approval will be sent to the email address indicated in the Submit page. Once the change request has been approved, City staff will update your Supplier Profile.

**PLEASE NOTE:** Once you have submitted a Supplier Change Request, your Supplier Profile will be frozen until the Supplier Change Request is approved and the Supplier Profile has been updated. Until the Supplier Profile update is completed, you will be able to access your Profile, but you will be unable to maintain or manage your Profile and Events.

Making changes in the Supplier Change Request is a simple process. A train stop bar is shown at the top of each page so that you can select only those items that need editing and track which step you are on during the revision process. All information selected or entered into the system is auto-saved unless the **Exit Button** is selected.

Various page navigation buttons are shown on each page, including:

- **Exit Button** - Cancels registration and any information that has been entered will be lost.
- **Save for Later Button** – Saves your registration for later completion. Primary Contact will receive an email notification with instructions on how to return to registration.
- **Previous Button** – Returns you to the prior step to review your entries and make any corrections.
- **Next Button** – Moves you to the next registration page.

Other navigation tools are available on various pages, including:

- **Asterisk (\*)** - Indicates that a question or field requires a response. You will be unable to continue your change request until you give a response to all required fields.
- **Magnifying Glass Icon** - Indicates that a list of options is available for selection.
- **Pencil Icon** - Indicates information that can be edited.
- **Paper Clip Icon** - Indicates that documents can be attached.
- **Glasses with Document Icon** – Allows user to review changes made in a Supplier Change Request.

To access the Supplier Change Request page:

1. Login to the Portal.
2. On the Profile Homepage, click on the **Supplier Change Request Page Link**.

## **Step 1 of 4: COMPANY PROFILE**

In Step 1, the Supplier can update the following:

### **Unique ID & Company Profile**

- **Supplier Name** - Legally registered business entity name as it appears on your Federal W-9 form.
- **Additional Name** - Name under which you operate your business if different from its legal, registered name (a.k.a. “doing business as”).

### **Government Classifications**

Currently, this section is not being used and does not need to be filled out.

### **Standard Industry Codes**

Currently, this section is not being used and does not need to be filled out.

### **Additional Reporting Elements**

Currently, this section is not being used and does not need to be filled out.

### **VAT Information**


Currently, this section is not being used and does not need to be filled out.


### **Profile Questions**


Supplier can add or update their tax documents.


1. Click the **Next Button** to proceed to the next Supplier Change Request page, Step 2: Addresses.

## Step 1 of 4: COMPANY PROFILE


  
Company Profile

  
Addresses

  
Contacts

  
Submit

Exit | Save for Later | Previous | Next

Company Profile for **ABC SUPPLY**  [Review Changes](#)

View or update general information about your company.

**Unique ID & Company Profile**

\*Supplier Name

Additional Name

[Expand All](#)   [Collapse All](#)

- ▶ **Government Classifications**
- ▶ **Standard Industry Codes**
- ▶ **Additional Reporting Elements**
- ▶ **VAT Registration**
- ▼ **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](#)

Attachments (0) Add/View Attachments

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](#)

Attachments (0) Add/View Attachments

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](#)

Attachments (0) Add/View Attachments

## **Step 2 of 4: ADDRESSES**

### **Revising an Address**

1. Click on the **Pencil Icon** at the end of the desired Address to revise.

Addresses for [Review Changes](#)

Add new addresses or select the pencil icon to edit the details for an existing address.

Description	Address Line 1	Change Action	Change Effective Date	Edit
84 FRESNO ST	84 FRESNO ST			
881 W FALLBROOK AVE	881 W FALLBROOK AVE			

[Add New Address](#)

[Review Changes](#)

[Exit](#) [Save for Later](#) [Previous](#) [Next](#)

2. The Supplier can update the following Address Information:
  - **Description** (Nickname for the Address for easy recognition)
  - **Country**
  - **Address1, Address2, Address3**
  - **City, County, Postal** zip code, **State**
3. The Supplier can add Phone Information associated with the Address including:
  - **Phone Type**
  - **Location**
  - **Prefix** (For International Calling)
  - **Telephone** (include Area Code)
  - **Extension**
4. To add more than one phone number for the Address, click on the **Add Phone Button** and enter the phone information outlined above in the new line.
5. The Supplier can choose when the Address changes take effect.
  - a. To authorize changes to take effect upon the City's approval of the Supplier Change Request, click on the **Approval Date Option**.
  - b. To authorize changes to take effect upon a future date, click on the **Future Date Option**. Enter the desired date.
6. Click on the **OK Option**.



## Adding an Address

1. Click on the **Add New Address Button**.
2. Complete steps 2 - 6 as outlined above in Revising an Address.

Click the **Next Button** to proceed to the next Supplier Change Request page, Step 3: Contacts.

**Address Information for Address 1** ×

**Address Information**

Description  ×

Country  United States

Address 1

Address 2

Address 3

City

County  Postal

State  Florida

**Phone Information**

Phone Type	Location	Prefix	Telephone	Extension	Remove
▼	<input style="width: 100%;" type="text"/>	<input style="width: 50%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 50%;" type="text"/>	<input type="checkbox"/>

Approved Changes Take Effect:  Approval Date  
 Future Date

## **Step 3 of 4: CONTACTS**

### **Revising a Contact**

1. Click on the **Pencil Icon** at the end of the desired Contact to revise.

Company Profile      Addresses      **Contacts**      Submit

Exit    Save for Later    < Previous    Next >

Contacts for  Review Changes

Add new contacts or select the pencil icon to edit the details for an existing contact

Name	Address	Change Action	Change Effective Date	Edit

Add New Contact

Review Changes

Exit    Save for Later    < Previous    Next >

2. The Supplier can update the following Address Information:
  - **Description** (Nickname for the Contact for easy recognition)
  - **Contact Name\***
  - **Contact Title**
  - **Email ID\***
  - **URL ID** (Business Website)
  - **Contact Address** – Addresses will be listed by their Description (nickname)
  - **Contact Type** – Select from a pre-defined Drop-Down List.
3. The Supplier can add Phone Information associated with the Contact including:
  - **Phone Type**
  - **Prefix** (For International Calling)
  - **Telephone** (include Area Code)
  - **Extension**
4. To add more than one phone number for the Contact, click on the **Add Phone Button** and enter the phone information outlined above in the new line.
5. The Supplier can choose when the Contract changes take effect.
  - a. To authorize changes to take effect upon the City's approval of the Supplier Change Request, click on the **Approval Date Option**.

b. To authorize changes to take effect upon a future date, click on the **Future Date Option**. Enter the desired date.

6. Click on the **OK Button**.

### Adding a Contact

Contacts that are added through the Supplier Change Request do not receive a User ID and the ability to login to your Supplier Profile. They are for informational purposes and can only receive notifications directly from Event Managers.

To add a new Contact that cannot login to the system:

1. Click on the **Add New Contact Button**.
2. Complete steps 2 - 6 as outlined above in Revising a Contact.
3. Click the **Next Button** to proceed to the next Supplier Change Request page, Step 4: Submit.

Contact Information for Leo Messi ×

**Contact Information**

Description

\* Contact Name

Contact Title

\* Email ID

URLID

Contact Address  ▼

Contact Type  ▼

**Phone Information**

Phone Type	Prefix	Telephone	Extension	Remove
Business Phone ▼	<input type="text"/>	878/234-7766	<input type="text"/>	<input type="checkbox"/>
FAX ▼	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

Approved Changes Take Effect:  Approval Date  
 Future Date

## **Step 4 of 4: SUBMIT**

To complete a Supplier Change Request, you will need to review and submit your changes.

The field for **Email communication regarding this request will be sent to** will default to the Email ID provided by the Primary Contact. If you would like the City's notification of Supplier Change Request Approval to be sent to another contact, provide the new email address.

1. The Supplier must select the reason for the Supplier Change Request. Select the most appropriate **Audit Reason Code** from the Drop-Down List.
2. Supplier can provide **Comments**.
3. Click on the **Review Button** to review your changes. All changes that were made will appear in a review page.

1. Click the **Review Button** to review your registration application. A review page with a summary of your information that was entered during registration will appear.
2. Scroll through and read the review page to make sure that your changes are correct.
  - a. If the changes are correct, click on the **Return Button** to go back to page.

- b. If the changes are incorrect, click on the **Pencil Icon** under the section that needs editing. The system will take you back to the applicable page. Once you have completed your edits, you will need to click the **Next Button** until you get back to Step 4: Submit.

## Review your Supplier Registration Page

Review Page for Taylor Services
×

Expand All
Collapse All

▼ **Address Information** ✎

Type	Information	Current	Proposed	Date To Change
<b>Address: Address 2</b>				
Add			Address 2 USA 1234 Main Street Sarasota Florida 33333	Approval
<b>Address-Phone</b>				
Add	Phone Type Location Prefix Telephone Ext		Business Phone	

▼ **Categorization** ✎

Type	Information	Current	Proposed
Add	Category Description		19036 Chemicals & Solvents

Return

## Submit Supplier Change Request

1. Click the **Submit Button** to submit your Supplier Change Request.

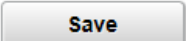
**PLEASE NOTE:** Once you have submitted a Supplier Change Request, your Supplier Profile will be frozen until the Supplier Change Request is approved and the Supplier Profile has been updated. Until the Supplier Profile update is completed, you will be able to access your Profile, but you will be unable to maintain or manage your Profile and Events.

## 4. Profile Maintenance Pages

### 4.1 My Categorizations

The My Categorizations page allows a Bidder or Supplier to maintain which buying or selling categories for Goods and/or Services they are interested in providing to the City. The City uses these categories to ensure that the appropriate companies are being notified of sourcing events.

To access the My Categorizations page:

1. Login to the Portal.
2. On the Profile Homepage, click on the **My Categorizations Page Link**.
3. To update select or deselect new or outdated categories.
4. Once complete click  at the bottom of the list.

< Main
My Categorizations

Welcome, ABC Supply  
User: JSmith

### My Categorizations

**Sourcing Categorization Tree**

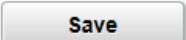
- Buy Categories
- Sell Categories
  - 98111 - Air Compressor Rental or Lease
  - 2585 - Air Compressors & Accessories
  - 7103 - Ambulance, Rescue Vehicles
  - 96206 - Animal Care Services
  - 32525 - Animal Food, Dog & Cat
  - 4003 - Animals and Supplies
  - 74505 - Asphalt, Aggregate
  - 80008 - Boots, Leather
  - 80016 - Boots, Rubber
  - 80086 - Boots, Work
  - 91052 - Building Maint Repair Services
  - 96113 - Charter Svcs-Buses/Cars/Boats
  - 20031 - Clothing-Hazardous Environment

## 4.2 Emergency Services

The Emergency Services page allows a Bidder or Supplier to maintain which buying or selling categories for Goods and/or Services they are interested in providing to the City during 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. The City uses these categories to ensure that the appropriate companies are being notified of sourcing events.

**PLEASE NOTE:** If you are willing to provide emergency Goods and/or Services for a category that you already selected in [My Categorizations](#), you will still need to select that category again here in [Emergency Services](#) to tag it as available for emergency purchase.

To access the My Emergency Categorizations page:

1. Login to the Portal.
2. On the Profile Homepage, click on the [Emergency Services Page Link](#).
3. To update select or deselect new or outdated categories.
4. Once complete click  at the bottom of the list.

### My Emergency Srvcs Categories

**Sourcing Categorization Tree**

Sourcing - Sourcing Categories

- Buy Categories
- Sell Categories
  - 98111 - Air Compressor Rental or Lease
  - 2585 - Air Compressors & Accessories
  - 7103 - Ambulance, Rescue Vehicles
  - 96206 - Animal Care Services
  - 32525 - Animal Food, Dog & Cat
  - 4003 - Animals and Supplies
  - 74505 - Asphalt, Aggregate
  - 80008 - Boots, Leather
  - 80016 - Boots, Rubber
  - 80086 - Boots, Work

## 4.3 Change My Password

The Change My Password page allows a Bidder or Supplier to change their login password.

To access the Change My Password page:

1. Login to the Portal.
2. On the Profile Homepage, click on the [Change My Password Page Link](#).

### PASSWORD

#### Change Password

To change your password, click on the [Change Password Link](#).

1. Enter your [Current Password](#).
2. Enter your [New Password](#).
3. Enter your new password a second time in [Confirm Password](#).
4. Click on the [Change Password Button](#).
5. When you receive the message that your password has been successfully change, click on the [OK Button](#).

**Change Password**

User ID taylor01

Description TAYLOR SER-001

\*Current Password

\*New Password

\*Confirm Password

[Change Password](#)