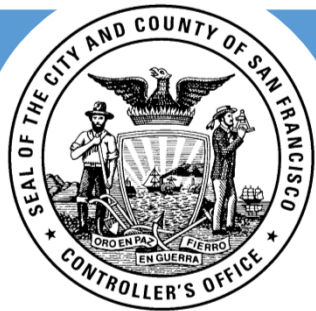




# Getting Started as an SF City Partner



**CITY & COUNTY OF SAN FRANCISCO**

Office of the Controller  
Systems Division

03.05.2018

# Dear SF City Partner,



You are very important to us!

We just made a big transition to our new Financial and Procurement System. We know change of this magnitude isn't easy and we want to make sure our suppliers and bidders are supported on this journey as well as the employees in our 65 City departments.

We have loads of resources to help you navigate the new system and use all of its great features.

Please use this as a resource handbook to get you pointed in the right direction.

# Where to Get Started

Your starting point depends on what your current status is. Please review the following options -- who are you?

Potential Bidder	Registered Bidder	Approved Supplier
<p>A potential bidder is a business that has never done business with the City but is interested in competing for bid opportunities.</p> <p>The first step for a potential bidder is to review the training for the supplier portal at <a href="http://sfcitypartner.sfgov.org">sfcitypartner.sfgov.org</a>.</p> <p>Our online training walks the User step-by-step through the registration process.</p> <p>Becoming a registered bidder allows the User to bid on City opportunities.</p>	<p>A registered bidder is a business that has successfully registered as a bidder in the supplier portal.</p> <p>Registered Bidders can bid on City Opportunities using the Supplier Portal.</p> <p>When a Registered Bidder wants to become an Approved Supplier, the Registered Bidder should begin by emailing <a href="mailto:sfcitypartnersupport@sfgov.org">sfcitypartnersupport@sfgov.org</a> or calling (415)-944-2442.</p> <p>Our User Support Team will assign the request (or ticket) to our Supplier Management Team. We'll also let the User know what documentation they must submit in order to progress to the next level (Approved Supplier).</p> <p>The Supplier Management Teams waits for confirmation from the Treasurer and Tax Collector's Office that Business Registration has been approved before converting a Bidder to a Supplier.</p> <p>A new Supplier ID is then issued.</p>	<p>Approved suppliers are suppliers who have been approved to conduct business with the city, whether or not they have won a contract. An approved supplier has completed the required compliance documents: 12B Compliance and Business Tax Registration.</p> <p>If you are an approved supplier who is not yet using the new supplier portal, please email <a href="mailto:sfcitypartnersupport@sfgov.org">sfcitypartnersupport@sfgov.org</a> or call (415)-944-2442 to get your username and password to the supplier portal.</p> <p>You can also begin your online training at <a href="http://sfcitypartner.sfgov.org">sfcitypartner.sfgov.org</a>.</p>

# Steps to Become an Approved Supplier

## Take Our Online Training

## Gather Your Info & Materials

## Register as a Bidder

## Contact User Support

## Complete Supplier Compliance

## Confirmation as Approved Supplier

- The Supplier Portal training\* covers everything from registering as a bidder to acknowledging payments
- Go to the Training page on the SF City Partner website: [sfcitypartner.sfgov.org/](http://sfcitypartner.sfgov.org/)
- A completed W-9 form (the W-9 Form can be found at [irs.gov](http://irs.gov))
- Federal Tax Identification Number or Social Security Number
- Official Name of Company, as listed on W-9
- Business Type, Contact Name and Address
- Go to the Supplier Portal. You will create a username for logging into our system while registering as a bidder
- After completing this step you will receive a Bidder ID and password to the portal
- You can then log in using this password and your username
- After registering as a Bidder, contact User Support by phoning (415) 944-2442 to let them know your intent to become a supplier
- You can also email User Support (see email on next page)
- User Support will create a ticket and assign your ticket to Supplier Management
- To become a supplier, entities must complete Business Tax Registration with the Treasurer & Tax Collector's Office (see link on next page)
- Entities must also submit a 12B Compliance Declaration. Registered Bidders can submit the 12B Compliance Declaration by logging into the Supplier Portal. (link on following pages)
- Once your business registration is processed, the City will convert your status from bidder to supplier and send you a Supplier ID number via email
- Please allow 3 business days to receive a Supplier ID number

# Complete Supplier Compliance

## Register Your Business in San Francisco

San Francisco's Business and Tax Regulations Code requires that every person engaging in business within the City to register within 15 days after commencing business within the City.

### Business Registration is handled by the Office of the Treasurer and Tax Collector

Via the link below, you can:

1. Determine if your business needs to register in San Francisco.
2. Register your business and/or link your existing business account to your Bidder/Supplier number.
3. Declare that you do not need to register as a business in San Francisco.

Once you have completed this process and paid your registration fee, allow 24 to 48 hours for your account to be updated.

Please go to this link to complete the online form:

<https://newbusiness.sfgov.org/vendor/>

## Submit Your 12B Declaration

All entities seeking to contract or lease with the City and County of San Francisco must comply with the Equal Benefits Ordinance. Suppliers must submit a declaration verifying compliance. This includes any Joint Venture that must establish its own vendor record and submit a separate 12B declaration.

The Ordinance **does not apply** to entities that do less than \$5,000 worth of business with the City per year, or to subcontractors that indirectly receive payments from the City through a Prime Contractor.

### Use the Supplier Portal to complete your 12B Declaration

As a registered bidder, or when you register online as a bidder, you can complete your 12B Declaration through the Supplier Portal.

Once approved, your 12B Compliance status will be updated in the system. However, if you do not see an update to your account, please send your CMD email confirmation to: [sfcitypartnersupport@sfgov.org](mailto:sfcitypartnersupport@sfgov.org)

# SF Supplier Portal

<https://sfsupplierportal.sfgov.org/psp/supplier/SUPPLIER/ERP/h/?tab=DEFAULT>

The screenshot shows the SF Supplier Portal homepage. The header includes the City and County of San Francisco logo and navigation links for Worklist, Home, and Sign Out. The main content area is divided into three columns: Login, Welcome, and Announcements. The Login column contains a 'Sign In' button, a 'Reset Password | Identity Management' link, and a 'Register as a Sourcing Bidder' link, which is circled in red and pointed to by a red arrow with the text 'Register as a bidder here'. The Welcome column features a large image of the San Francisco City Hall and a 'Welcome' message. The Announcements column includes a 'Notice of Intent' section and a 'Visit the links below for additional information' section with various links. A 'System Alerts' section is also present, indicating no alerts at the time. The bottom of the page features a 'Contact Us' section with 'Login Issues' and 'Registration Issues' sub-sections.

**Login**

Sign In

Login into your Account.

[Reset Password | Identity Management](#)

Click the above link to change your password, update your security questions, or register your email address and/or mobile phone number to take advantage of enhanced security features.

[Register as a Sourcing Bidder](#)

Click here to register as a bidder and be able to bid on events

If you are already a vendor with the city and county of San Francisco, do not register as a sourcing bidder. Instead, obtain a supplier login by contacting [sfcitypartnersupport@sfgov.org](mailto:sfcitypartnersupport@sfgov.org).

**System Alerts**

There are no system alerts at this time.

**Contact Us**

**Login Issues**

Contact the Department of Technology Help Desk if you are unable to connect to or log in to the eMerge PeopleSoft system. Examples of connection issues include a "network error" message in your internet browser. An example of a log in issue is if you do not have a valid password or user name. If you are unable to access the Supplier Portal, please contact the DT Help Desk.

Email: [DTIS\\_helpDesk@sfgov.org](mailto:DTIS_helpDesk@sfgov.org)  
Phone: (415) 581-7100  
DT Home Page: <http://sfgov.org/DT>

**Registration Issues**

For assistance with bidder registration, please contact [sfcitypartnersupport@sfgov.org](mailto:sfcitypartnersupport@sfgov.org) or visit the web site at <https://sfcitypartnersupport.sfgov.org/support/home>.

**Welcome**

Welcome to the City and County of San Francisco's Supplier Portal.

This is the central access point for our suppliers and business partners to view valuable information related to conducting business with us. In addition, active suppliers and business partners may also log in to our secure system from this portal to access current transaction information for their accounts.

Registration is required in order to view and respond to business opportunities issued by the City. Register as a Bidder by using the link on the left side of the screen. For additional help with registration, email the [SF City Partners Help Desk](#).

**Announcements**

**Notice of Intent**

Notice of Intent to Award Bid Proposal: 0000000481  
Micro LBE Set Aside for As-Needed Graffiti Removal

**Visit the links below for additional information.**

Migration of all City Bid Opportunities to a single Supplier/Bidder Portal is planned but not complete, so interested Bidders should also check the following site(s) for other potential [City Bid Opportunities](#).

[Office of Contract Administration \(OCA\)](#)

[New Business Registration](#)

[Business Registration Renewal](#)

[Chapter 12B - Equal Benefits Program](#)

[Chapter 14B - Local Business Enterprise Ordinance](#)

As of 9/1/2017, these reports can be found on the Contract Monitoring Division's (CMD) website through the links below.

[12B Compliant Firms Report](#)

[14B Certified Firms Report](#)

**FAQs**

**General Information**

- General Information
- Supplier Portal Instruction Guides

Item Name
DEM_RFP_Earthquake Data Management System
Fiber to Premises Network, Lit Fiber & Wi-fi Svcs
Muni Metro System King Substation Upgrade
OCA - TC72121 Vehicle Washing and Detailing Svcs
OCA TC77408 Lamps, Ballast & LED Luminaires
OCA-DPW- Trailer-Mounted Mobile Generator
OCA-DPW-1T DIESEL LOCKSMITH CARGO VAN
OCA-DPW-One Ton Cargo Van wt Electricians PKG
OCA-DPW-SIX WHEEL MECHANICAL STREET SWEEPER
OCA-PUC-Stake Bed Truck with Liftgate
OCA-REC-STANDON BLOWER
OCA-REC-Two (2) Towable Wood Chippers
OCA-SFFD-Portable Gas Monitors and Accessories
OCA-Sheriff-One Ton Cargo Van
OCA_POL- Night Vision Binoculars

# Need Help? We Have Lots of Resources!



## 24/7 Online Resources

Go To Website:

<https://sfcitypartner.sfgov.org>

Go to SF City Partners, the  
Self-Help Knowledge Center:

[https://sfcitypartnersupport.sfgov.org/  
support/home](https://sfcitypartnersupport.sfgov.org/support/home)



## Live Help

Call User Support:

**(415) 944-2442**

8:30 AM to 5:30 PM

Email:

[sfcitypartnersupport@sfgov.org](mailto:sfcitypartnersupport@sfgov.org)



## One-on-One Labs

Mondays

(Except Holidays)

9:00 AM – 5:00 PM

Drop in at 1155 Market, 6<sup>th</sup> Floor  
Or Make a Reservation by emailing

[sfcitypartnersupport@sfgov.org](mailto:sfcitypartnersupport@sfgov.org)

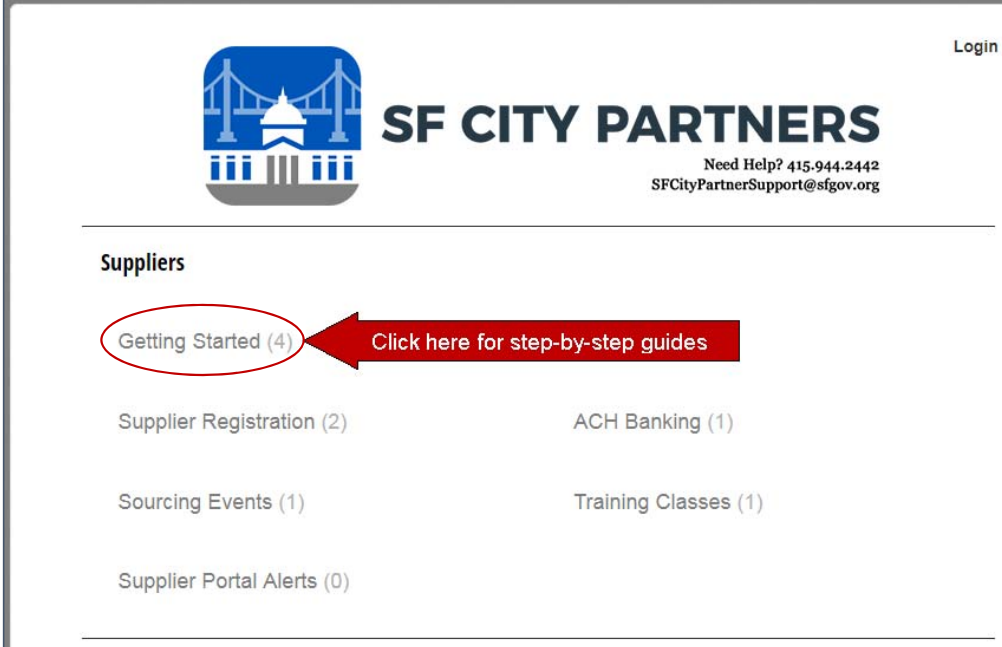
WebEx is available by appointment

# Self-Help Knowledge Center Resources


1. Go to: <https://sfcitypartnersupport.sfgov.org/support/home>
2. Click the Knowledge Base image:



3. Click “Getting Started” for a list of help articles



Login



**SF CITY PARTNERS**  
Need Help? 415.944.2442  
SFCityPartnerSupport@sfgov.org

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**Suppliers**

Getting Started (4) **Click here for step-by-step guides**

Supplier Registration (2)      ACH Banking (1)

Sourcing Events (1)      Training Classes (1)

Supplier Portal Alerts (0)