

SAePS Vendor Training

Vendor Benefits

- ❑ User friendly dashboard for vendors
- ❑ Self administration to manage user access and information
- ❑ Email notification of solicitations relevant to vendor
- ❑ Electronic vendor response including modification, withdrawal of bids, versioning of bids and confirmation of bidder's participation
- ❑ Electronic catalogs—eliminates high-maintenance paper catalogs
- ❑ Increased data accuracy and visibility of invoice process for vendors and COSA
- ❑ Improved requisition-to-order cycle time

Prime and Subcontractors

Vendors/Suppliers wishing to take advantage of the features and benefits of the City of San Antonio procurement tool are required to complete the electronic registration process

- ❖ You are considered a “Procurement Supplier” if one of the following conditions exists:
 - Your company will receive payments from the City of San Antonio under a contract or purchase order
 - Your company will receive Request for Quotations, Purchase Orders, or other Procurement documents
 - Your company is a construction contractor

What do I need to get started?

□ Internet Access

- If you do not have Internet Access at your place of business, you can access the Internet at a Public Library (note: There will be no one to assist with vendor registration, please call vendor support (210-207-0118))

□ Adobe Acrobat Reader

- If you do not have Adobe Reader, you can download a free copy from the City of San Antonio website

□ Email address

- If you do not have an email address you can create a free account using Yahoo, Gmail, Hotmail



To begin the registration process go to:

Note: Vendor Registration is a 2 Step Process

<http://www.sanantonio.gov/Purchasing/saeps.aspx>

Step 1: Vendor Pre-Registration Form

The following information is required to initiate the vendor registration process

* Required Entry

Company Details

Name of Company *	<input type="text"/>
D-U-N-S Number	<input type="text"/>
Federal Tax ID *	<input type="text"/>
Language *	English <input type="button" value="v"/>
Type *	<input type="text"/>

Administration Contact Details

The contact information and email address provided will receive all procurement communications including bid solicitations.

Title *	<input type="text"/>
First Name *	<input type="text"/>
Last Name *	<input type="text"/>
E-Mail Address *	<input type="text"/>
Telephone *	<input type="text"/>
Extension	<input type="text"/>
Fax *	<input type="text"/>
Extension	<input type="text"/>

Address Details

Street Number *	<input type="text"/>	Street Name *	<input type="text"/>
Building	<input type="text"/>		
Floor	<input type="text"/>	Room Number	<input type="text"/>
Postal Code *	<input type="text"/>	City *	<input type="text"/>
State	<input type="text"/>	Country *	Please choose <input type="button" value="v"/>
P.O. Box	<input type="text"/>	PO Box Postal Code	<input type="text"/>
PO Box City and State	<input type="text"/>	PO Box Country	Please choose <input type="button" value="v"/>

Data Privacy Statement

I understand that I am receiving a vendor registration number from the City of San Antonio. This number allows the City of San Antonio to recognize me or my company in their financial software system. This number does not mean that I am an awarded vendor. To become an awarded vendor I must comply with all the City of San Antonio policies regarding such. I further understand that my vendor registration number can be revoked at anytime if I do not follow all applicable City of San Antonio policies, related procedures and all applicable federal and State laws. I further understand that it is my responsibility to have knowledge of all applicable federal and State laws and any changes that may occur.

The City seeks to maximize participation of small, minority, and women-owned business on contracts. To assist in achieving desired levels of participation, contact information, NIGP codes and certifications for registered vendors may be made accessible on the City of San Antonio website. I understand that the City will have no control over how this information is used or its further dissemination by the public or other vendors, and I hereby release and discharge City from any liability for damages incurred therefrom.

certify that the information that I am supplying is true and correct and that it is my obligation to notify City of San Antonio if any information changes and that I have read the data privacy statement listed above.

Vendor Submission Confirmation

Vendor Submission Confirmation

Thank you. You have just completed the first step in the City of San Antonio vendor registration process. An email will be sent to you shortly with confirmation of this submission. If you do not receive an email please check your junk email folder prior to contacting the Vendor Support at 210-207-0118 or by email at vendors@sanantonio.gov

* You may now close the browser window

Email Confirmation of Pre-Registration

From: COSA DV1 Registration [ROS@dv1.sus.sanantonio.gov]

Sent: Tue 8/30/2011 8:55 AM

To: Cynthia Gomez

Cc:

Subject: COSA_Q02

The City of San Antonio has successfully received your pre-registration information and is processing your registration. Please allow two business days to receive your User ID and Password.

Please visit our NIGP Code lookup page by clicking on the link below, to identify possible 5 digit NIGP Commodity Codes for goods or services your company is able to provide. Upon receiving your User ID and Password you must enter the NIGP Codes your company is able to provide to ensure you receive the City of San Antonio solicitation notices for these goods or services.

<https://webapps.sanantonio.gov/NIGPCodes/>

For assistance, please call Vendor Support at (210) 207-0118 or e-mail us at vendors@sanantonio.gov .

Important Information to update in SAePS Portal

The following fields are important to complete in the portal as this will pertain to how the City of San Antonio will evaluate your company and how you will receive your solicitations

- **Spend Categories:** These are the 5 digit NIGP Commodity Codes you will enter for the type of goods/services you are able to provide. Please only select the commodities your company can provide. If you need help identifying your NiGP Codes please refer to the following link. <https://webapps.sanantonio.gov/NIGPCodes/>
- **Vendor Information:** This section are additional questions pertaining to your company.
- **SRM User Setting:** Validate the information in this section is correct especially the email. The email provided here is where all solicitations will go. Please note: only one userid can be used per vendor. Setting up a general email address is recommended for multi-use.
- **Security Question & Password:** Under User Profile you can create a security question and password for password resets

Email Notification with User ID and Temporary Password

From: Cynthia Gomez [mailto:vendors@sanantonio.gov]
Sent: Monday, September 12, 2011 9:51 PM
To: Olga Bennett
Subject: COSA Vendor Log-on Information

We are pleased to welcome your company as a potential vendor in the San Antonio eProcurement System (SAePS) portal.

Your User ID is: V10007951
Your temporary password is: T5836Vht

To access the [SAePS Portal](#), or cut and paste <https://supplierservice.sanantonio.gov> into the address bar of your browser. You may want to create a favorite or bookmark for this web address for future use.

Log into the system using the User ID and temporary password. The first time you log into the system, you will be prompted to change your temporary password. Please note your password must contain a minimum of 8 characters, and at least:

- 1 uppercase letter
- 1 lowercase letter
- 1 number

Upon accessing the SAePS portal, it is very important that you create a security question and answer. They will be necessary in the event you need to reset your password in the future, as the City will not reset passwords via email or telephone. Additionally, please enter the required information by clicking on each of the SPEND CATEGORIES and VENDOR INFORMATION tabs within your profile.

NIGP codes, also referred to as spend categories, assist us to better understand the types of goods or services you are interested in providing to the City. We encourage you to research these codes thoroughly and include all applicable codes to ensure you receive bid notifications when the City is interested in purchasing these specific goods or services.

For assistance with navigating in the SAePS portal, please use the [SAePS Vendor Guide](#), or cut and paste http://www.sanantonio.gov/Purchasing/SAePS_help_guides.aspx into the address bar of your web browser.

The City of San Antonio requires successfully awarded vendors to submit your W-9. Please submit a copy of your W-9 via email to vendors@sanantonio.com or fax: 210-207-9778.

For assistance, please call Vendor Support at 210-207-0118 or email vendors@sanantonio.gov .



Step 2: Supplier Portal Logon



User ID *
Password *

Supplier Logon Problems? [Get Support](#)

Enter permanent username
(Vxxxxxxx)

Enter temporary password
provided on email

Access to this system is limited to authorized users only. Unauthorized access to the system, the unauthorized use of an account, or the unauthorized use of a password are criminal offenses under Section 33.02 Texas Penal Code.



Supplier Portal Logon Password Change



! Password has expired

Change Password

User ID	<input type="text" value="V10000133"/>
Old Password *	<input type="password"/>
New Password *	<input type="password"/>
Confirm Password *	<input type="password"/>
	<input type="button" value="Change"/> <input type="button" value="Cancel"/>

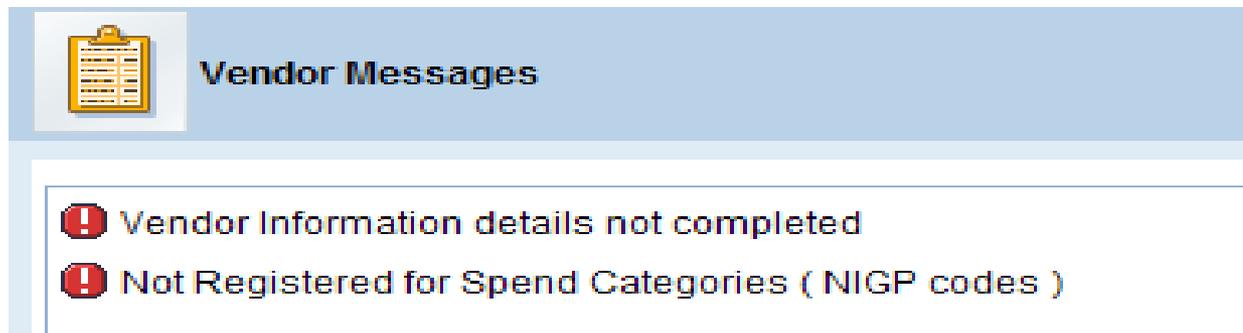
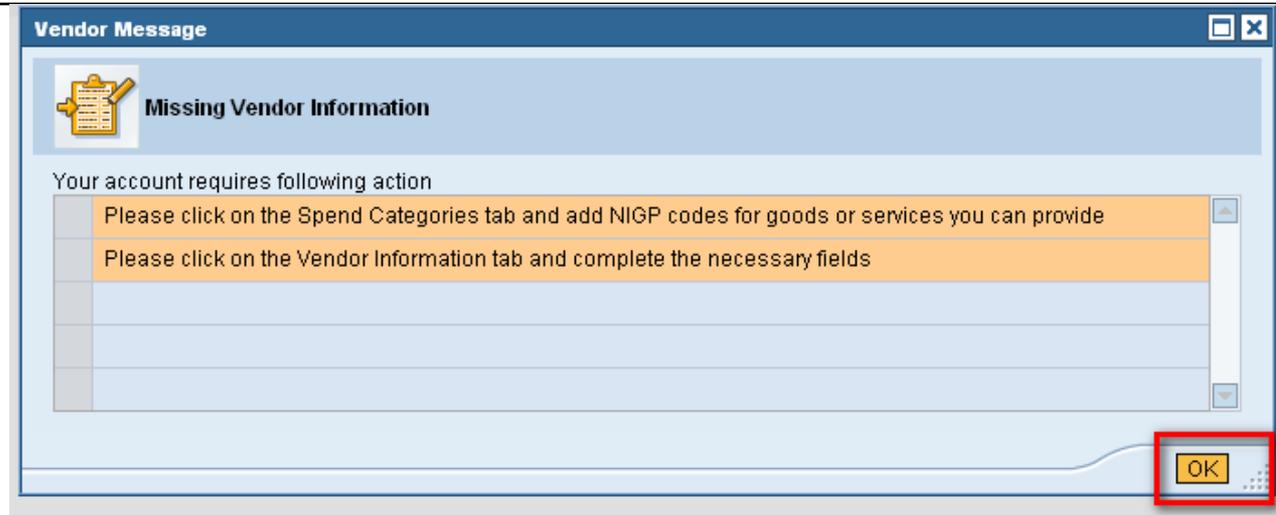
Old Password: use temporary password provided on email

Generate new password for SAePS Portal (Password must be a minimum of 8 characters in length (containing 3 letters, 2 numbers, 1 uppercase letter and 1 lowercase letter))



Missing Vendor Information

Your initial login will display a message with actions required to complete your account. Click Ok



Spend Categories

page 1 of 2

<https://webapps.sanantonio.gov/NIGPCodes/>

Important: The NIGP Commodity Codes you select will determine the solicitation notices your company will receive via e-mail. You may add or delete commodities within your profile as frequently as you desire. View [NIGP Lookup](#)

The screenshot shows the 'Spend Categories' page in the SAePS system. The breadcrumb navigation at the top includes 'Bidder', 'Home', 'Overview', 'Vendor Information', and 'Spend Categories'. A red box highlights the 'Spend Categories' link. Below the navigation is a sidebar with 'Spend Categories' selected. The main content area is titled 'Spend Categories Registered' and contains an empty table with columns 'Product Category' and 'Description'. Below the table, there are 'Add' and 'Delete' buttons. A red box highlights the 'Add' button. A second red box contains the text: '2. Click on Add to begin adding your Spend Categories.' At the bottom, the 'Supplier Id' is displayed as '10014138'.

1. Click on Spend Categories
Note: this may take a few seconds to download

Product Category	Description
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2. Click on Add to begin adding your Spend Categories.

Supplier Id: 10014138

Spend Categories

page 2 of 2

Bidder

Home | Overview | Vendor Information | Spend Categories

Spend Categories

Detailed Navigation

- Spend Categories

Portal Favorites

Available Spend Categories

Add categories either by searching or by selecting from the list below

Search Product Category

You can enter the 5 digit commodity codes in the Search Product Category or scroll through the entire list

Product Category	Description
00505	ABRASIVE EQ & TOOLS
00514	ABRSV, COATED: CLOTH
00521	ABRASIVE SANDBL MTL
00528	ABRASIVES, SANDBLAST
00542	ABRASIVES, SOLID: WH
00556	ABRASIVE TUMBL WHEEL
00563	GRINDING COMPOUNDS
00570	PUMICE STONE
00575	RECYCLED ABRASIVES P
00584	STEEL WOOL, ALUMINUM

Click on back to main screen when you have completed entering your NiGP Commodity Codes. You will then notice the commodities you are registered for

Note: To select multiple rows, hold down Ctrl key and click on the rows.
To de-select, hold down Ctrl key and click on the rows.

Vendor Information Update

Questions 1 – 13 are pre-populated. Information is gathered from the initial registration

Question 14-17 and 21a – 21i are pre-populated. Information is verified by the South Central Texas Regional Certification Agency (SCTRCA). If you are not registered with SCTRCA, the fields will remain blank

All other questions is required for the vendor to complete.

Note: Vendors will not have authorization to make changes to areas that are grayed out. To make changes to question 1 – 13, please submit a letter to vendors@sanantonio.gov requesting the change. Please include your last four digits of your tax id number.

If you are registered with SCTRCA and your certifications are not populated, please make sure your Tax ID # is correct with COSA and with SCTRCA. Please contact vendor support for additional information 210-207-0118.

Information updated Successfully for Supplier 0010002035 into Database.

Vendor Information Update

1. COSA Supplier Number:	10002035
2. Legal Entity Name:	New SAePS
3. Doing Business As (DBA):	
4. Search Term:	
5. Physical Address:	15743 4th Street
6. City:	San Antonio
7. State:	TX
8. Zip Code:	78222
9. Telephone Number:	+12102223333
10. Fax Number:	+12104441234
11. Email Address:	cynthia.gomez@sanantonio.gov
12. Social Security Number:	
13. Federal Employer Identification Number:	12-4574141
14. RCA Certification Number:	
15. RCA Certification Date:	
16. RCA Certification Expiration Date:	
17. Date Last updated from RCA:	
18. Headquarter Physical Location	
18a. Address: *	17845 Broadway
18b. City: *	San Antonio
18c. State: *	TX
18d. Zip Code: *	78222
18e. Telephone No. (Area Code): *	210-333-4444
18f. Date established: *	05/01/1999

18g. Total number of part-time and full-time employees, company-wide: *

50

19. SAMSA Physical Location: San Antonio Metropolitan Statistical Area (SAMSA) is defined as: Atascosa, Bandera, Bexar, Comal, Guadalupe, Kendall, Medina and Wilson counties. Vendors with multiple SAMSA offices only need to enter one address.

19a. Is the Headquarter located in the SAMSA?: *

No Yes

20. SAMSA Physical Location:

20a. If the vendor is not Headquartered in the SAMSA, does the vendor have any: office(s) in the SAMSA? If "Yes" respond 20b through 20g. If "No" skip to 21:

No Yes

20b. Address: *

20c. City: *

20d. State: *

20e. Zip Code: *

20f. State the number of part-time, full-time and contract employees in the SAMSA: office(S):

20g. Date SAMSA offices(s) established:

00/00/0000

Small Business Economic Development Advocacy Program - Please visit www.sanantonio.gov/edd/SmallBusiness/#SBEDA for more information.

21. Are you certified with the South Central Texas Regional Certification Agency?: Please visit www.sctrca.org for more information:

No Yes

21a. Small Business Enterprise (SBE):

21b. Asian Business Enterprise (ABE):

21c. African American Business Enterprise (AABE):

21d. Hispanic American Business Enterprise (HABE):

21e. Native American Business Enterprise (NABE):

21f. Women Business Enterprise (WBE):

21g. Disadvantage Business Enterprise (DBE):

21h. Emerging SBE (ESBE):

21i. Minority Business Enterprise (MBE) and:

21j. Airport Concessionaire Disadvantaged Business Enterprise (ACDBE):

21k. If you are HUBZone certified, please indicate certification number:

14789114879784

Any information captured in this registry will not preclude the registrant from responding to COSA solicitations.

By clicking Save you affirm that the information provided is true and completed by an individual authorized to do business for the vendor. Vendor is required to update profile within 72 hours of any changes. Vendor is required to update any changes to the profile and confirm interest in performing work for the City annually.

Save

To delete details, use this Button

Delete

Vendor Message Update

Click on Home > The Vendor Message will display both sections have been completed > Click on SRM User Setting to update Contact Information

The screenshot shows the SAePS Vendor Message page. The top navigation bar includes 'Bidder', 'Home', 'Overview', 'Vendor Information', and 'Spend Categories'. The 'Home' tab is highlighted with a red box. Below the navigation bar, the 'Vendor Message' section is displayed. On the left, a 'Detailed Navigation' sidebar lists 'Vendor Message', 'Personalization', 'SRM User Settings', 'Portal Personalization', and 'User Profile'. A red arrow points from a text box to the 'SRM User Settings' link in the sidebar. The main content area shows a 'Vendor Messages' section with two checked items: 'Vendor Information details completed' and 'Registered for Spend Categories (NIGP codes)'. At the bottom of the main content area, there is a link for 'SRM User Settings' with a red arrow pointing to it from the text box.

Click on Personalization > SRM User Settings or click on the link

SRM User Settings 1 of 3

This section is the contact information that will be used for bid solicitations. (Note: only one contact person and one email can be used)

The screenshot displays the SRM User Settings page. At the top, there are search options: "Search" and "Advanced Search". Below this is a breadcrumb trail: "Bidder" | "Home" | "Overview" | "Vendor Information" | "Spend Categories". The main heading is "SRM User Settings". On the left, a "Detailed Navigation" sidebar lists several options: "Vendor Message", "Personalization" (expanded to show "SRM User Settings" and "Portal Personalization"), and "Portal Personalization" (expanded to show "User Profile"). At the bottom of the sidebar is "Portal Favorites". In the main content area, there is a yellow icon of a multi-tool and a link labeled "SRM User Settings" which is highlighted with a red rectangular box.

SRM User Settings 2 of 3

Display Contact Person : 10013148

[Help](#)

Employee User ID V1000038 Business Partner Type Contact Person Document Date 03/09/2011 Business Partner Number 10013148 Name of Business Partner 1000038 Bidder

[Edit](#)

[Close](#)

[System Information](#)

[Create Memory Snapshot](#)

[Contact Person Data](#)

[Contact Data](#)

Basic Data

Title: *	<input type="text" value="Mr."/>	Academic Title:	<input type="text"/>
First Name: *	<input type="text" value="1000038"/>	Last Name: *	<input type="text" value="Bidder"/>
Language: *	<input type="text" value="EN"/> English	Country: *	<input type="text" value="US"/> USA
Search Term1:	<input type="text"/>	Search Term2:	<input type="text"/>
Time Zone:	<input type="text" value="CST"/> Central Time (Dallas)	Format Name:	<input type="text"/>
Building Code:	<input type="text"/>	Floor / Room Number:	<input type="text" value=""/> / <input type="text"/>
Company Department:	<input type="text"/>	Internal Mail:	<input type="text"/>
Print Format:	<input type="text"/>		
Is Service Agent:	<input type="checkbox"/>		
Is Contact Person:	<input checked="" type="checkbox"/>		

User Data for Contact Person

User ID: *	<input type="text" value="V1000038"/>
Date Format: *	<input type="text" value="MM/DD/YYYY"/>
Decimal Notation: *	<input type="text" value="1,234,567.89"/>

* Required Entry

SRM User Settings 3 of 3

Edit Contact Person : 10013148

[Help](#)

Employee User ID V1000038

Business Partner Type Contact Person

Document Date 03/09/2011

Business Partner Number 10013148

Name of Business Partner 1000038 Bidder

[Save](#)[Close](#)[Read Only](#)[System Information](#)[Create Memory Snapshot](#)

Contact Person Data

[Contact Data](#)

▼ Telephone Numbers

[Add Lines](#) [Delete](#)

*Telephone Number	Extension	*Country	Description	*Standard
555-555-5555		US	USA	<input checked="" type="radio"/>

▼ Fax Numbers

[Add Lines](#) [Delete](#)

Fax Number	Extension	Country	Description	Standard
				<input type="radio"/>

▼ E-Mail Addresses

[Add Lines](#) [Delete](#)

*E-Mail Address	*Standard
test@hotmail.com	<input checked="" type="radio"/>

Setup Security Question and Password 1 of 2

The screenshot shows the SAePS (San Antonio eProcurement System) user interface. At the top, there is a search bar with a 'Search' button and a link to 'Advanced Search'. Below this is a navigation bar with 'Bidder' selected and other options like 'Home', 'Overview', 'Vendor Information', and 'Spend Categories'. The main content area is titled 'User Profile'. On the left, a 'Detailed Navigation' sidebar shows a tree structure: 'Vendor Message', 'Personalization' (expanded), 'SRM User Settings', and 'Portal Personalization' (expanded), with 'User Profile' selected and highlighted by a red box. In the main 'User Profile' area, a 'Modify' button is also highlighted with a red box. Below the 'Modify' button are four tabs: 'General Information', 'Contact Information', 'Additional Information', and 'User Mapping for System Access'. The 'General Information' tab is active, displaying the following user details:

Logon ID:	V10001352
Last Name:	Gomez
First Name:	Cyndy
E-Mail Address:	cynthia.gomez@sanantonio.gov
Form of Address:	
Language:	
Activate Accessibility Feature:	<input type="checkbox"/>
Company:	COSA_SUPPLIERS
Security Policy:	Default

Important: The security question must be created, as it will be required in the event you have forgotten your password, you will have the ability to click on the “Get Support” on the portal to reset the password

The screenshot shows the SAePS User Profile page. The page has a top navigation bar with 'Bidder', 'Home', 'Overview', 'Vendor Information', and 'Spend Categories'. Below this is a 'User Profile' section with a 'Detailed Navigation' sidebar on the left containing 'Vendor Message', 'Personalization', 'SRM User Settings', 'Portal Personalization', and 'User Profile'. The main content area has tabs for 'General Information', 'Contact Information', 'Additional Information', and 'User Mapping for System Access'. The 'General Information' tab is active, showing fields for 'Login ID' (V10001352), 'Old Password', 'Define Password', 'Confirm Password', 'Security Question' (my cats name), 'Security Answer' (garfield), 'Last Name' (Gomez), 'First Name' (Cyndy), 'E-Mail Address' (cynthia.gomez@sanant), 'Form of Address', 'Language', 'Activate Accessibility Feature', 'Company' (COSA_SUPPLIERS), and 'Security Policy' (Default). Annotations include: a red box around the 'Save' button with the text 'Click Save when completed'; a blue box around the password fields with the text 'No action is required in these section unless you are changing the password created at your initial log in for the SAePS portal.'; a red box around the security question and answer fields with the text 'Enter a security question of your choice and password'; and a blue box around the contact information fields with the text 'The contact information listed will only receive the email for password resets.'

Vendor Registration Completed

Overview

- ✓ You have updated your NiGP Commodity Codes (**Spend Categories tab**)
- ✓ You have answered additional questions in the **Vendor Information tab**
- ✓ You have verified contact information in **SRM User Settings**
- ✓ You have created a **Security Question and Password**



You have successfully completed
City of San Antonio 2 Step vendor
registration process