

# VENDOR GUIDE TO ADD ACH

## Step 1

Log into ESM (Vendor must already be registered for these steps to work)

<https://eprocurement.esmsolutions.com/https://eprocurement.esmsolutions.com/>

## Step 2

Click on Profile. To open the Profile section.

Hi Crystal

Home Profile Events

**ESM Solutions Supplier Portal**  
\*\*Click on the Events tab to access RFPs, RFQs, bids and more.\*\*  
Please contact bidding organizations directly to request event invitations.  
What are the benefits of being an ESM Supplier?

- Ability to view and respond to sourcing opportunities across ESM's customer base
- Search capability for open invitation events
- Ability to track bids and awards

sourcing opportunities - new

Event Name	Customer Name	Invitation Type	Due By
<a href="#">This is a test RFP for the Posting Board</a>	Villanova University	Open Invitation	12/31/2029
<a href="#">Test Bid for Pricing Matrix</a>	Villanova University	Open Invitation	12/31/2030

sourcing opportunities - in progress

No items to display.

sourcing opportunities - recently awarded

No items to display.

customer registration requests

Customer Name	Contact Name	Contact Email	Version #	Status	Actions
ABC University	Ross Harris	<a href="mailto:rhesmdemo@gmail.com">rhesmdemo@gmail.com</a>	1	Not Registered	<a href="#">Register</a> <a href="#">Dismiss</a>
Adrienne's School -New	Adrienne Cianfarini	<a href="mailto:acianfarini@esmsolutions.com">acianfarini@esmsolutions.com</a>	4	Not Registered	<a href="#">Register</a> <a href="#">Dismiss</a>
Andrew - Training Account	Andy Jones	<a href="mailto:ar_supplier1@protonmail.com">ar_supplier1@protonmail.com</a>	1	Not Registered	<a href="#">Register</a> <a href="#">Dismiss</a>
Berkeley County Schools -New	Nick Zalla	<a href="mailto:nicholaszalla@berkeley.gov">nicholaszalla@berkeley.gov</a>	5	Not Registered	<a href="#">Register</a> <a href="#">Dismiss</a>
Dunder Mifflin University -New	Whitney Clark	<a href="mailto:clarkwhitney218@gmail.com">clarkwhitney218@gmail.com</a>	3	Not Registered	<a href="#">Register</a> <a href="#">Dismiss</a>
DuPage - Training Instance	Jordan Towne	<a href="mailto:townej@cod.edu">townej@cod.edu</a>	1	Not Registered	<a href="#">Register</a> <a href="#">Dismiss</a>

## Step 3

Open the Drop Down list

## Step 4

Select Add/Edit User

Hi Crystal

Home Profile Events

Select Function

- Add/Edit User
- Attachment Library
- Commodities
- Customer List
- Company Information
- Business Classification
- Email Notifications

First Name:

Last Name:

Phone:

Address:

Reset Password:

Primary Contact:

View SSN:

Email Alerts:

Time Zone: Eastern Time

Deactivate User:

Privileges:  Home  Profile  Events

Profile Privileges:  Add/Edit User  Attachment Library  Commodities  Customer List  Company Information  View Banking and Routing Information  Edit Banking and Routing Information  Business Classifications  Event Notifications

Update Cancel

Step 5

Type the name of the person to be edited

Step 6

Click Go

The screenshot shows the 'add/edit user' interface. At the top, there's a navigation bar with 'Home', 'Profile', and 'Events'. Below that, a search bar for the user is present. The main form area is divided into two columns. The left column contains personal information fields: Email ID, First Name, Last Name, Phone, Address, Reset Password, Primary Contact, View SSN, Email Alerts, Time Zone, and Deactivate User. The right column contains privilege settings. Under 'Privileges', 'Home', 'Profile', and 'Events' are checked. Under 'Profile Privileges', 'Add/Edit User', 'Attachment Library', 'Commodities', 'Customer List', 'Company Information', 'View Banking and Routing Information', 'Edit Banking and Routing Information', 'Business Classifications', and 'Event Notifications' are listed. 'View Banking and Routing Information' is checked, while 'Edit Banking and Routing Information' is unchecked and circled in red. 'Update' and 'Cancel' buttons are at the bottom right.

Step 7

Move the cursor to the View Banking and Edit Banking boxes

Step 8

Click to check the box to allow the person to View Banking information

Step 9

The Edit Box will change from gray to white.

Click to check the box to allow the person to Edit Banking information

This screenshot shows the same 'add/edit user' interface as the previous one, but with the 'User' field populated with 'crystal'. In the 'Profile Privileges' section, 'View Banking and Routing Information' is checked, and 'Edit Banking and Routing Information' is now checked and circled in red. The other settings and buttons remain the same.

Step 10

Click the Blue Update button

Step 11

Log out by Clicking on the down arrow next to “Hi Name” in the top right corner

The screenshot shows the 'add/edit user' interface. The user 'crystal' is selected. The form contains the following fields and options:

- Email ID:** cyordygreer@gmail.com
- First Name:** Crystal
- Last Name:** Greer
- Phone:** 816-604-1341
- Address:** 3200 Broadway, Kansas city, Missouri, United States
- Reset Password:**
- Primary Contact:**
- View SSN:**
- Email Alerts:**
- Time Zone:** Central Time
- Deactivate User:**
- Privileges:**
  - Home
  - Profile
  - Events
- Profile Privileges:**
  - Add/Edit User
  - Attachment Library
  - Commodities
  - Customer List
  - Company Information
  - View Banking and Routing Information
  - Edit Banking and Routing Information
  - Business Classifications
  - Event Notifications

Step 12

Log back in to see the ACH Banking menu option

Step 13

Repeat Steps 2 and 3

Step 14

Click on Banking and Routing Information

The screenshot shows the 'Banking and Routing Information' menu option highlighted in a dropdown menu. The dropdown menu is open, showing the following options:

- Add/Edit User
- Attachment Library
- Commodities
- Customer List
- Company Information
- Banking and Routing Information** (circled in red)
- Business Classifications
- Email Notifications

Step 15

Click through the boxes adding information to each box with a \* in front of it

Step 16

Click the Blue Update button when all boxes are filled in to save the changes

Step 17

Click on the arrow next to your name to log out

