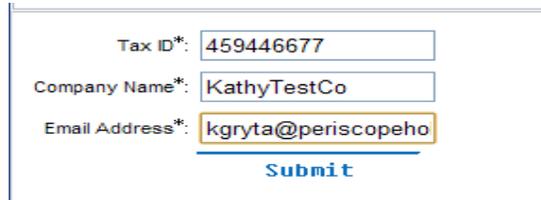


Beginning the Registration Process

In order to receive notifications about bid opportunities or to be issued purchase orders (POs) through ePro, vendors must be registered within the system. Vendors register themselves by accessing the ePro login screen and selecting **Register**.

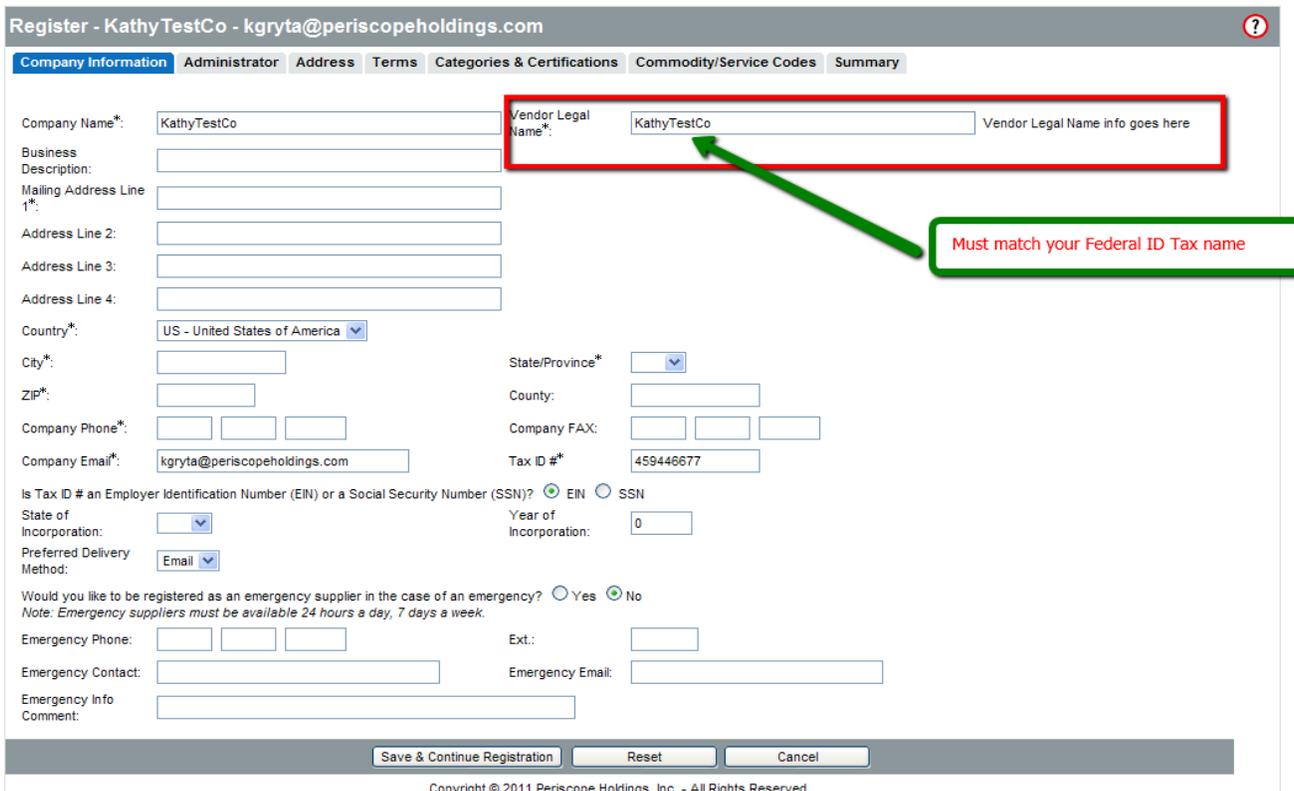
Providing General Information

When you click on **Register**, a pop-up window will appear. Enter your company's Federal Tax Identification Number and name, or your Social Security number and name. If your tax ID is already registered, you will be notified that you cannot complete the registration process. If you are a foreign vendor, call the Help Desk (see number above) for assistance.



Tax ID*: 459446677
 Company Name*: KathyTestCo
 Email Address*: kgryta@periscopeho
 Submit

If your tax ID is new to the system, a **Register** screen will appear. In the **Company Information** section, supply your company's official address and contact information. Note that the Vendor Legal Name field must match the name registered with the Internal Revenue Service for your federal tax ID number.



Register - KathyTestCo - kgryta@periscopeholdings.com

Company Information | Administrator | Address | Terms | Categories & Certifications | Commodity/Service Codes | Summary

Company Name*: KathyTestCo
 Vendor Legal Name*: KathyTestCo Vendor Legal Name info goes here

Business Description:
 Mailing Address Line 1*:
 Address Line 2:
 Address Line 3:
 Address Line 4:

Country*: US - United States of America
 City*:
 ZIP*:
 Company Phone*:
 Company Email*: kgryta@periscopeholdings.com

State/Province*:
 County:
 Company FAX:
 Tax ID #: 459446677

Is Tax ID # an Employer Identification Number (EIN) or a Social Security Number (SSN)? EIN SSN
 State of Incorporation:
 Year of Incorporation: 0

Preferred Delivery Method: Email

Would you like to be registered as an emergency supplier in the case of an emergency? Yes No
 Note: Emergency suppliers must be available 24 hours a day, 7 days a week.

Emergency Phone:
 Ext.:
 Emergency Contact:
 Emergency Email:
 Emergency Info Comment:

Save & Continue Registration | Reset | Cancel

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In the **Administrative User Information** section, provide the information for an administrative user for your organization in the system. This user will be designated as the **"Seller Administrator"** and will be responsible for updating organizational information and adding new users.

Note: The Login ID and Password must be 5-20 characters long, containing at least one letter, and one number and must be unique in the system. A duplicate Login ID will result in an error screen. The initial password is temporary and will need to be changed the first time you log in. At this time, a login question and answer must be provided – this will enable your administrator to access the Forgot Password link in case of a forgotten password.

Vendor Registration

Quick Reference Guide

Help Desk: (855) 800-5046

Register - KathyTestCo - kgryta@periscopeholdings.com

Company Information | **Administrator** | Address | Terms | Categories & Certifications | Commodity/Service Codes | Summary

Administrative User Information

Salutation:

First Name*: Last Name*:

Job Title*: Department:

Email*: Phone*:

Login ID*:

New Password*: Confirm Password*:

Login Question*: Login Answer*:

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Once complete, you may select to **Add Another Address** (Remit-to, Bid, etc.) or to **Continue Registration**.

Register - KathyTestCo - kgryta@periscopeholdings.com

Company Information | Administrator | **Address** | Terms | Categories & Certifications | Commodity/Service Codes | Summary

Maintain Addresses for: KathyTestCo

Name	Address Type	Address Information	Status	Default for Type
General	General Mailing Address	Kathy Gryta 211 E. 7th Street Austin, TX 78701 US Email: kgryta@periscopeholdings.com Phone: (512)555-1212	Active	Yes

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If you add addresses, you may elect to designate default PO, Bid, and Remit addresses.

Enter a New Address

Address Type:

Name this Address*:

Contact Name*:

Address Line 1*:

Address Line 2:

Address Line 3:

Address Line 4:

Country*:

City*: State/Province*:

ZIP*: County:

Phone*: Ext:

Toll Free: Mobile:

Fax: Email*:

Status:

Default address for this address type

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Selecting Your Terms, Categories and Certifications

As you continue the registration process, you will be taken to the **Terms Tab**, which offers the County's standard options.

Register - KathyTestCo - kgryta@periscopeholdings.com

Company Information | Administrator | Address | **Terms** | Categories & Certifications | Commodity/Service Codes | Summary

Payment Terms:

Shipping Terms:

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Save & Continue to go to the **Categories and Certifications** screen. Here you are asked to designate your status for various categories and certifications requested by the County.

Register - KathyTestCo - kgryta@periscopeholdings.com

Company Information | Administrator | Address | Terms | **Categories & Certifications** | Commodity/Service Codes | Summary

Category: 1099 Type -- if unknown or not applicable, select 10

Please select exactly one category value

<input type="checkbox"/>	1-Rents
<input type="checkbox"/>	10-Crop Insurance Proceeds
<input type="checkbox"/>	13-Excess Golden Parachute Payments
<input type="checkbox"/>	14-Gross Proceeds Paid to an Attorney
<input type="checkbox"/>	15a-Section 409A deferrals
<input type="checkbox"/>	15b-Section 409A income
<input type="checkbox"/>	16-State tax withheld
<input type="checkbox"/>	2-Royalties
<input type="checkbox"/>	3-Other Income
<input type="checkbox"/>	4-Federal Income Tax Withheld
<input type="checkbox"/>	5-Fishing Boat Proceeds
<input type="checkbox"/>	6-Medical and Health Care Payments
<input type="checkbox"/>	7-Non-employee Compensation
<input type="checkbox"/>	8-Substitute Payments

Notes:

After you have completed this screen, click **Save & Continue Registration** at the bottom of the screen.

Registering for Commodity Codes

The last step in the registration process is to select the commodities and services that you provide. The commodity codes you select will be used to determine which notifications you will receive regarding bid opportunities available for your product or services.

The **Commodity and Service Codes** screen allows you to search for the National Institute of Governmental Purchasing (NIGP) Codes that correspond with what you offer. You can peruse general categories of commodities and services, or search by keyword. Click **Save and Add** to list additional commodity codes. Once you have selected all the codes that match what you provide, select **Save and Continue Registration**.

Register - KathyTestCo - kgryta@periscopeholdings.com

Company Information Administrator Address Terms Categories & Certifications **Commodity/Service Codes** Summary

Search

NIGP Class

NIGP Class Item

NIGP Keyword

Search using

i Use the NIGP Commodity Code Search Engine if you are familiar with the NIGP code. If not use the NIGP Code Browse below.

NIGP Code Browse

i Select the category that best describes the product and service you offer. Click on the question mark for more information.

01	Administrative, Financial, and Management Services
02	Agricultural Equipment and Related Products and Services
03	Arts, Crafts, Entertainment, Theatre
04	Automotive Products, Vehicles, and Services
05	Building Equipment, Supplies, and Services
06	Clothing, Textiles, Laundry Equipment, and Supplies
07	Communication Equipment and Services
08	Computers, Software, Supplies, and Services

What happens next?

Thank you for completing the self-registration process with the County of San Bernardino ePro electronic procurement system. A message will be sent to the email address you provided within the **Company Information** to confirm that your registration is complete. If your registration is not complete at this point, you will receive an email with information about how to return to ePro to complete the process.

Vendor Profile Maintenance Quick Reference Guide

Help Desk: (855) 800-5046

To ensure receipt of notifications about bid opportunities or to be issued purchase orders (POs) through ePro, you must make sure your information is current within the system. You can do this by accessing the ePro login screen and signing in with your unique Login ID and Password.

Who Can Update Vendor Data?

Upon logging into ePro with your unique Login ID and Password, you may update your company's vendor data if you have the role of **Seller Administrator**. To update your company's data, click on the **Seller Administrator** tab if it displays. NOTE: Users without the role of Seller Administrator can only update their personal information by clicking on **My Account**.

Seller Administrators are presented with four initial options on their **Homepage**:



Maintenance Home Page for: Rejan's Super Company

General Alerts

- Maintain Organization Information**
This section is used for maintaining organization information.
- Maintain Users on this Account**
This section is used to maintain users for the organization.
- Add Users on this Account**
This section is used to add users to the organization.
- Add Associated Organization**
This section is used for adding an organization with the same Tax ID.

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By clicking on the **Maintain Organization Information**, Seller Administrators can update their company general information, addresses, terms, categories/certifications, and the commodities in which they provide. The following guides you through these updates:

Updating Vendor General Information

ePro will track general information about your company, including business description, primary email, fax, and information you may choose to provide as an Emergency Supplier (authorizing the Agency to contact you 24/7 for emergency orders). This data may be updated by clicking on Maintain General Organization Information.

Vendor Profile Maintenance

Quick Reference Guide

Help Desk: (855) 800-5046

[NIGP Code Browse](#) | [My Account](#) | [Customer Service](#) | [About](#)
Seller **Seller Administrator**
 August 3, 2009 4:51:34 PM CDT
[Home](#) | [Org Maintenance](#) | [User Maintenance](#) | [Add User](#)
Chris Kennedy

Maintain General Organization Information

Vendor ID: 00000016

Company Name*: Bob's Taxidermy

Tax ID #: #####433 Country Code for Tax ID: US - United States of America

Is Tax ID # an Employer Identification Number (EIN) or a Social Security Number (SSN)? EIN SSN

Incorporation Details: State: Year of Incorporation: 0

Business Description:

Preferred Delivery Method: Email

Vendor Email: tgarza@goperiscope.com

Vendor Fax:

Emergency Supplier: Yes No

Emergency Phone*: Ext.:

Emergency Contact Name*:

Emergency Email*:

Emergency Info Comment:

Updating Vendor Addresses

To update addresses, click the **Maintain Addresses** icon. This will provide a list of current addresses registered for your company. You can update an existing address by clicking on the blue link in the **Name** column, or you can click **Add Another Address** to create a new address for your company.

[NIGP Code Browse](#) | [My Logo](#) | [Customer Service](#) | [About](#)
Seller **Seller Administrator**
 July 16, 2009 10:58:10 AM CDT
[Home](#) | [Org Maintenance](#) | [User Maintenance](#) | [Add User](#)
John Andretti

Maintain Addresses for: Tires R Us

Name	Address Type	Address Information	Status	Default for Type
General	General Mailing Address:	John Andretti 1234 Sitraighta Way Lotus, AZ 55555 US Email: John.Andretti@trtru.com Phone: (555)555-5555	Active	Yes
Purchase Order	Purchase Order Mailing Address:	Jeff Gordon 500 Indianapolis Way Phoenix, AZ 55555 US Email: jeff.gordon@trtru.com Phone: (555)555-5555 Ext. 5	Active	Yes

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ePro allows you to save multiple types of addresses for your company, including **General**, **Bid**, **Purchase Order**, and **Remittance** addresses. In addition, you can have multiple addresses for each type (example: if you have multiple locations where POs can be sent by the County); however, you will be asked to identify a Default address for each type you create. Once you have made all additions or changes, click **Save & Exit** to return to the list of addresses for your company.

Vendor Profile Maintenance

Quick Reference Guide

Help Desk: (855) 800-5046

[NIGP Code Browse](#) | [My Account](#) | [Customer Service](#) | [About](#)

[Seller](#) | [Seller Administrator](#)
 July 16, 2009 10:59:09 AM CDT

[Home](#) | [Org Maintenance](#) | [User Maintenance](#) | [Add User](#)
John Andretti

Address Book - Tires R Us

General Mailing Address

Name this Address*:
 Contact Name*:
 Address Line 1*:
 Address Line 2*:
 Address Line 3*:
 Address Line 4*:
 Country*:
 City*: State/Province*:
 ZIP*: County:
 Phone*: Ext:
 Toll Free: Mobile:
 Fax: Email*:
 Status:
 Default address for this address type

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Updating Commodity Codes and Services

To update information you have provided the County about which goods and services you offer, click the **Maintain Commodity Codes and Services** icon. This will help ensure that you receive notifications about bid opportunities for those commodities and services. From this screen, you can either **Display Inactive Commodity Codes** to view any codes you had previously registered for, but that the County no longer uses for vendor searches.

For most updates, you should click **Maintain Commodity Codes**. You will see a list of commodities and services you previously registered for. You can deactivate current commodities, or add new commodities by clicking **Add Additional Codes** to reach the **Commodity and Services Codes** screen.

The **Commodity and Service Codes** screen allows you to search for the National Institute of Governmental Purchasing (NIGP) Codes that correspond with what your entity offers. You can peruse general categories of commodities and services, or search by keyword. To choose additional commodities, click **Save and Add More**. Once you have selected all the codes that match what you provide, select **Save**.

Vendor Profile Maintenance

Quick Reference Guide

Help Desk: (855) 800-5046

Commodity and Service Codes - Testing Labs ?

Search

NIGP Class

NIGP Class Item

NIGP Keyword

Search using

1 Use the NIGP Commodity Code Search Engine if you are familiar with the NIGP code. If not use the NIGP Code Browse below.

NIGP Code Browse

1 Select the category that best describes the product and service you offer. Click on the question mark for more information.

01	Administrative, Financial, and Management Services
02	Agricultural Equipment and Related Products and Services
03	Arts, Crafts, Entertainment, Theatre
04	Automotive Products, Vehicles, and Services
05	Building Equipment, Supplies, and Services
06	Clothing, Textiles, Laundry Equipment, and Supplies
07	Communication Equipment and Services
08	Computers, Software, Supplies, and Services
09	Food, Equipment, and Related Services
10	Furnishings and Related Services
11	Furniture and Related Services
12	Hardware, Related Equipment, and Services
13	Highway Road Equipment, Materials, and Related Equipment
14	Janitorial and Cleaning Equipment, Supplies, and Services
15	Laboratory Equipment, Supplies, and Services
16	Maintenance and Repair of Equipment
17	Medical Equipment, Supplies, and Services
18	Miscellaneous Commodities and Services
19	Office Supplies, Related Items, and Services
20	Paper, Printing Equipment, and Related Products and Services
21	Personal Products, Equipment, and Services
22	Public Works, Park Equipment, and Construction Services
23	Rental and Leasing Services
24	Safety and Protection Equipment and Related Services
25	School and Library Equipment, Supplies, and Services
26	Sporting, Athletic, and other Outdoor Equipment and Services
27	Testing and Sampling Equipment and Services
28	The Trades: Electrical, Engineering, HVAC, Plumbing, and Welding
29	Transit Equipment and Related Services, Mass
30	Water and Sewer Treatment Equipment, Supplies, and Services

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Updating Terms and Categories

To update information you have provided the County regarding payment, freight and shipping terms, click the **Maintain Terms and Categories** icon.

Here, using the pull-down menu, you can update your standard payment and shipping terms, which can be applied to purchase orders issued by the County, as well as update your status for various categories and certifications requested by the County.

The **Categories and Certifications** options for the County of San Bernardino are different from the examples shown below. Please be sure you have provided an answer for all categories that are designated 'required'.

After you have completed this screen, click **Save & Continue Registration** along the bottom. Thank you.

Vendor Profile Maintenance

Quick Reference Guide

Help Desk: (855) 800-5046

Terms, Categories, and Certifications - Durango Trading Company

Terms

Payment Terms:

Freight Terms:

Shipping Method:

Shipping Terms:

Categories & Certifications

Category: Tax ID Certification

Please select exactly one category value

Select	
<input type="checkbox"/>	Under Penalties of perjury, I certify that the number shown on this form is my correct taxpayer identification number.
<input type="checkbox"/>	Under Penalties of perjury, I certify that I am waiting for a taxpayer identification number to be issued to me.

Notes:

Category: Backup Withholding Certification

Please select exactly one category value

Select	
<input type="checkbox"/>	Under Penalties of perjury, I certify that I am not subject to backup withholding because I am exempt from backup withholding.

Vendor Maintenance – Add a User

Quick Reference Guide

Help Desk: (855) 800-5046

To ensure receipt of notifications about solicitation opportunities or to be issued purchase orders (POs) through ePro, you must make sure that users within your company are set up to receive this information and their information is current. You can do this by accessing the ePro login screen and signing in with your unique Login ID and Password.

Who Can Update Vendor Data?

Upon logging into ePro with your unique Login ID and Password, you may update your company's vendor data if you have the role of **Seller Administrator**. To update your company's data, click on the **Seller Administrator** tab in the upper right hand corner. If the tab does not appear, you are already in that tab. NOTE: Users without the role of Seller Administrator can only update their personal information by clicking on **My Account**.

Seller Administrators are presented with four initial options on their **Homepage**:



By clicking on the **Maintain Users on this Account**, Seller Administrators can determine whether the user is already set up in the system or whether adding the user is required. The following steps guide you through adding a new user:

Add User

ePro registration requires the user name, job title, department, phone number, email, login id, password, security question, and answer, along with the user role. To begin adding a new user, select the **Add User** button. To update the user information, click on the **Login ID** of that user (left column).



Note: A user's login must be unique in the system. An error screen may mean that the chosen Login ID is already in use.

Enter New User Information

Complete the New Vendor User information, including all required fields (fields with an “*”).

New Vendor User for Tires R Us

Salutation	<input type="text"/>	Last Name*:	<input type="text"/>
First Name*:	<input type="text"/>	Department	<input type="text"/>
Job Title*:	<input type="text"/>	Email*:	<input type="text"/>
Phone*:	<input type="text"/> - <input type="text"/>	Status*:	<input type="text"/>
Login ID*:	<input type="text"/>	Confirm Password*:	<input type="text"/>
New Password*:	<input type="text"/>	Login Answer	<input type="text"/>
Login Question	<input type="text"/>		

Roles

Seller

Seller Administrator

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Note: A user’s Login ID must be **unique** in the system. An error screen at this point may mean that the chosen Login ID is already in use.

Select Role for New User

In the **Roles** section, selecting **Seller** will allow that user to view and respond to solicitations. The **Seller Administrator** role does not include the ability to view and respond to solicitations. Both roles may be appropriate for one user.

New Vendor User for Tires R Us

Salutation	<input type="text"/>	Last Name*:	<input type="text" value="Gordon"/>
First Name*:	<input type="text" value="Jeff"/>	Department	<input type="text"/>
Job Title*:	<input type="text" value="CTO"/>	Email*:	<input type="text" value="jeff.gordon@trtru.com"/>
Phone*:	<input type="text" value="555 555 5555"/> - <input type="text"/>	Status*:	<input type="text" value="Active"/>
Login ID*:	<input type="text" value="jeff.gordon@trtru.com"/>	Confirm Password*:	<input type="text" value="*****"/>
New Password*:	<input type="text" value="*****"/>	Login Answer	<input type="text" value="’67 Camaro SS"/>
Login Question	<input type="text" value="What was you first car?"/>		

Roles

Seller

Seller Administrator

Click the **Save & Exit** button upon completion. New user is now entered. Thank you.

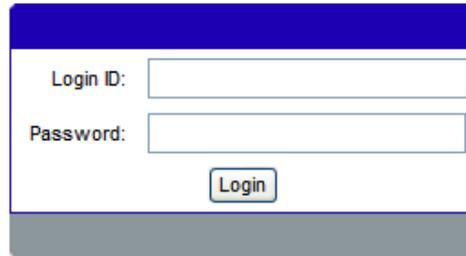
Adding Attachments to Vendor Profile Quick Reference Guide

Help Desk: (855) 800-5046

In order to do business in the County, you may be required to provide specific documents such as insurance certificates for validation by the County staff. This information can be uploaded to your vendor profile or record with the county. To do this, you must first have completed the registration process and have your user id and password.

Login

Enter your user id and password into the login screen:



Login ID:
Password:

[Forgot your password?](#)

Select the Correct Profile

Be sure to select the Seller Administrator tab on your profile:



Navigate to the Upload Feature

Click the box labeled Maintain Organization Information :



Maintenance Home Page for: Rejan's Super Company

General Alerts

Maintain Organization Information
This section is used for maintaining organization information.

Maintain Users on this Account
This section is used to maintain users for the organization.

Add Users on this Account
This section is used to add users to the organization.

Add Associated Organization
This section is used for adding an organization with the same Tax ID.

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Adding Attachments to Vendor Profile

Quick Reference Guide

Help Desk: (855) 800-5046

Click the box labeled Maintain General Organization Information:

Maintain General Organization Information



This section is used for maintaining general organization information.

Maintain Addresses



This section is used to maintain addresses.

Maintain Commodity Codes & Services



This section is used to maintain commodity codes and services.

Maintain Regions



This section is used to maintain regions.

Maintain Terms and Categories



This section is used to maintain terms and categories.

Maintain Quote Attachment Repository



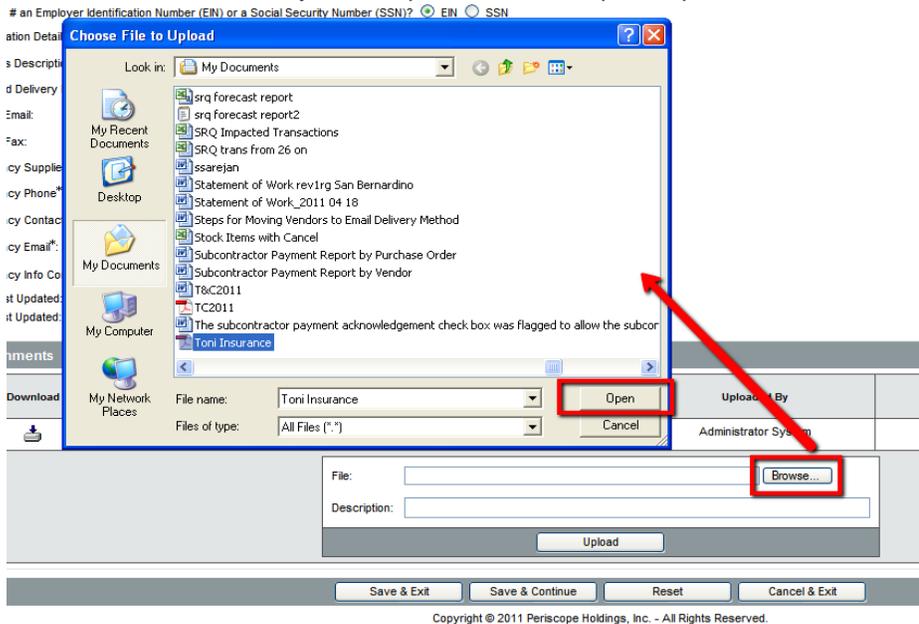
This section is used to maintain files in the quote attachment repository.

Select, Upload and Delete Files

Click the browse button to view files on your computer and select the correct one to upload:

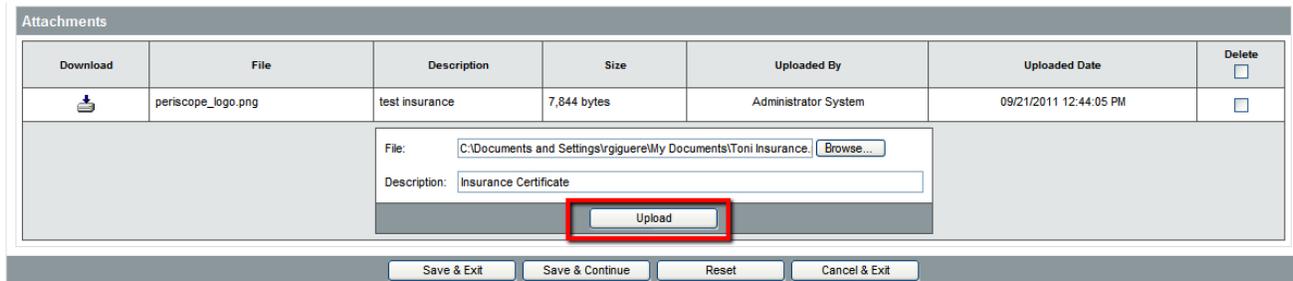
Attachments						
Download	File	Description	Size	Uploaded By	Uploaded Date	Delete
	periscope_logo.png	test insurance	7,844 bytes	Administrator System	09/21/2011 12:44:05 PM	<input type="checkbox"/>
<div style="display: flex; justify-content: space-between;"> <div style="width: 60%;"> <p>File: <input style="width: 90%;" type="text"/></p> <p>Description: <input style="width: 90%;" type="text"/></p> </div> <div style="width: 35%; text-align: center;"> <input style="width: 80%; height: 20px;" type="button" value="Browse..."/> </div> </div> <div style="text-align: center; margin-top: 10px;"> <input type="button" value="Upload"/> </div>						

Select the correct file on your computer and click open to pull the

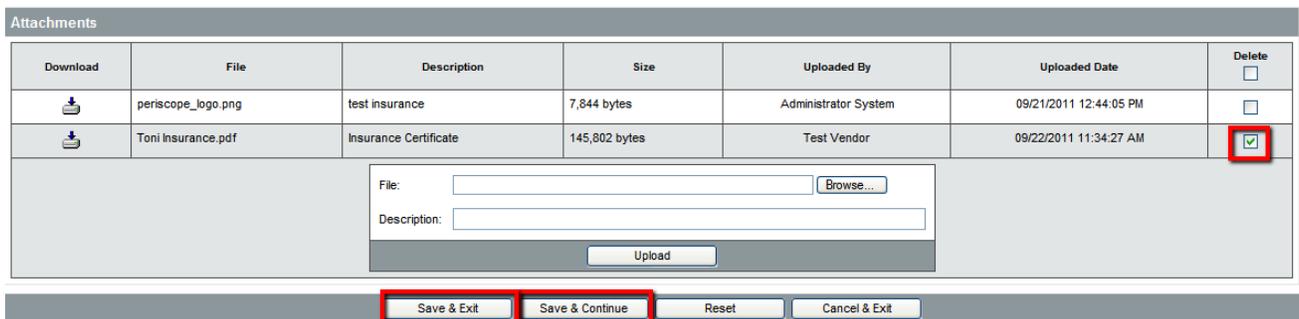


file back into ePro:

Once you have the file listed, you can add a description and then click **Upload** to add the document to your BuySpeed vendor profile.



To remove a file you have added, simply click the delete checkbox next to the appropriate file, then click either **Save & Exit** or **Save & Continue**:



Responding to a Solicitation

Quick Reference Guide

Help Desk: (855) 800-5046

The following will guide a vendor through the process of responding to a solicitation. In ePro, a solicitation (Invitation to Bid, Request for Proposal, etc.) is referred to as a “Bid” document.

All solicitations issued by the County of San Bernardino in ePro will be managed and published online, including, in most cases, solicitation responses by vendors. In order to respond to a solicitation, a Vendor must be a fully registered vendor in ePro. If the vendor is not registered, they should register by accessing the ePro login screen and selecting **Register**.

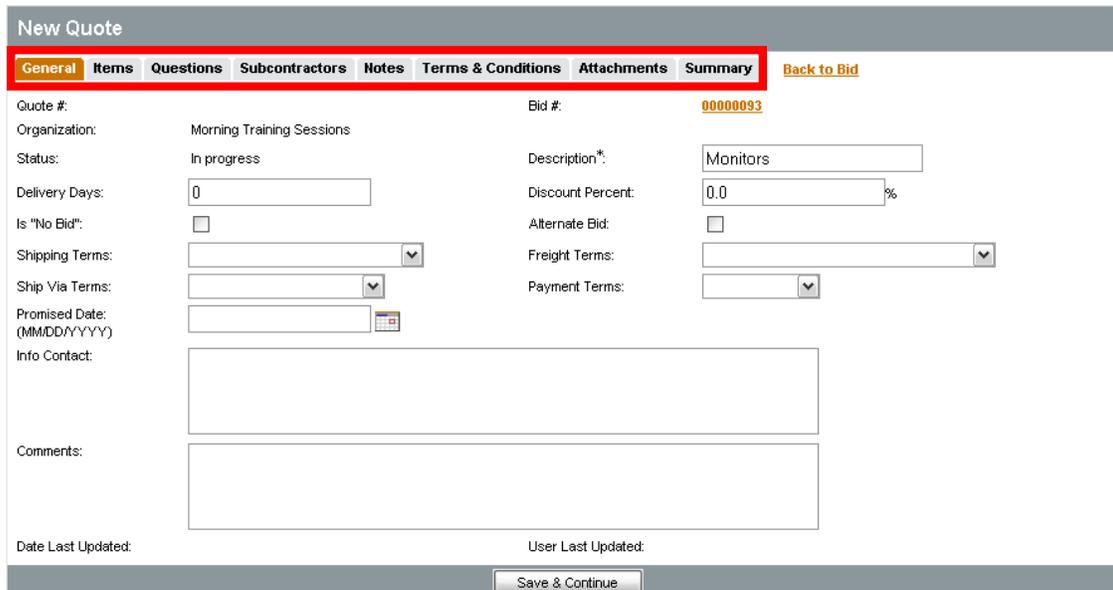
For vendors who are fully registered, log in with the User ID and Password.

Creating a Response to the Solicitation

In ePro, a response (offer, quote, bid, or proposal) to a solicitation is referred to as a “Quote.” Once you are viewing an active, open solicitation, you can create a response by clicking the **Create Quote** button on the bottom of the screen. This will display the **New Quote** screen.

Quotes are completed by working through the tabs along the top of the document from left to right, saving on each tab. The final tab on the right, the Summary tab, contains a summary of all of the data entered on the previous tabs and allows you to submit the Quote.

NOTE: You must click **Submit Quote** on the Summary tab for your response to be submitted and be considered for award.



The following table provides a description of the fields provided on the **General** tab of the quote. Please note that the * denotes a required field.

Quote Number	Will be auto assigned upon completion of the General tab
Description	Same as the Bid description. This can be edited to provide a description of your response, if appropriate

Responding to a Solicitation

Quick Reference Guide

Help Desk: (855) 800-5046

Delivery Days	If applicable, number of days for delivery
Discount Percent	If entered, will indicate the payment discount term being offered for all items on quote. Terms of less than 30 days for cash discount will be considered as net.
Is "No Bid"	Selecting "No Bid" will notify the County that you do not wish to submit a response
Alternate Bid	If the vendor submits multiple quotes, the vendor can flag specific response as "alternate"
Terms	Defaults to terms selected during vendor registration. These can be modified by selecting the appropriate term from the drop down menu
Promised Date	If applicable, promised date for delivery of the requested good or service (for one-time delivery)
Info Contact	Enter Vendor primary contact information for the solicitation response
Comments	Enter in any comments for the quote. This will display to the buyer and be considered part of your response

Once the vendor has entered in the necessary fields, click **Save and Continue**. The screen will refresh and a unique quote number will be assigned.

Error Messaging

While working on the Quote, the vendor may see red or yellow error messages. Red error messages indicate that something must be corrected before submitting a response. A yellow warning indicates a component of the response that may be non-standard; however the response can be submitted even if yellow warnings display.

Quote Validation Errors

- Terms & Conditions is not acknowledged.

Responding to a Solicitation

Quick Reference Guide

Help Desk: (855) 800-5046

Items Tab

The items tab is where the vendor will enter pricing information for the items requested.

Quote 00000147 - Tim's Laptops

General **Items** Questions Subcontractors Notes Terms & Conditions Attachments Summary [Back to Bid](#)

General Notes

Sort by Column: Print Sequence Sort Descending

Item #	Print Sequence	Questions Exist	Description								
			Quantity	UOM	Unit Cost	Discount %	Tax Rate	Freight	Extended Amount	No Bid	No Charge
1	1.0	No	20" Flat Screen Monitor								
			10.0	EA	0.00	0.0		0.00	\$0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
		Alternate Description:	<input type="text"/>								
Quote Response Total									\$0.00		

The following fields allow for the vendor to enter in information:

Unit Cost	Enter in the unit cost per item. ePro will automatically multiply the unit cost by the quantity.
Discount Percent	Enter in the discount for the specific item, if applicable. ePro will automatically calculate the amount
Tax Rate	If applicable, choose the Tax Rate. ePro will automatically calculate the amount
Freight	DO NOT ENTER FREIGHT HERE follow the instructions in the bid document regarding how freight is expected to be handled in your response.
No Bid	If checked, the vendor is not supplying a quote for this specific item
No Charge	If checked, the item is considered to be included provided the vendor is awarded the contract
Alternate Description	An alternate description can be provided, either to supplement the description provided in the County's solicitation or to replace the County's description. For example, you can use this field to indicate if you are providing a different brand, or if pricing is based on a specific unit of measure that is different than indicated in the solicitation. Be sure to follow the guidance in the bid as to if these alternatives are allowed.

Once completed, click **Save & Continue**

Responding to a Solicitation

Quick Reference Guide

Help Desk: (855) 800-5046

Questions Tab

The Questions tab allows the vendor to respond to questions posted on the Bid. Please note that if responses to questions are required, the vendor must respond in order to allow the Quote to be submitted. Unanswered questions will generate red error messages.

Quote 00000147 - Tim's Laptops

General Items **Questions** Subcontractors Notes Terms & Conditions Attachments Summary [Back to Bid](#)

Question #	Required	Question	Response
1	No	What brand of monitor is it?	<input type="text"/>

Save & Continue

Subcontractor Tab

If indicated as part of a solicitation, a response may require you to indicate if you are using subcontractors. If subcontractors are used, you may be asked to provide the following information:

- Identify the specific vendor/subcontractor(s). The vendor must be registered in ePro. You can search for the vendor by clicking **Lookup and Add Vendor**. If the subcontractor is not registered, they must register prior to submitting your response, or you may be considered non-responsive.
- Provide a proposed dollar amount being paid to the subcontractor if you are awarded the contract.

Notes Tab

The Notes tab allows vendors to record internal comments. For example, if multiple vendor users are working on a response, the Notes tab can be used to track changes from one user to another. **Please note that the County will NOT see any notes when evaluating the responses.**

Quote 00000147 - Tim's Laptops

General Items Questions Subcontractors **Notes** Terms & Conditions Attachments Summary [Back to Bid](#)

i The quote notes tab is for vendor users to enter useful information about the quote. Only authorized users who have access to this profile can view the information added to this tab. This information is not viewable by the agency.

Delete	Note Date	User	Note
<input type="checkbox"/>			<input type="text"/>

Save & Continue Reset

Responding to a Solicitation

Quick Reference Guide

Help Desk: (855) 800-5046

Terms & Conditions Tab

The Terms & Conditions tab allows the vendor to view or download any attachments to the solicitation. The attachments will include the official documentation related to the solicitation. The vendor is also asked whether or not they accept the terms and conditions of the solicitation.

Quote 00000147 - Tim's Laptops

General Items Questions Subcontractors Notes Terms & Conditions Attachments Summary Back to Bid

The following list constitutes all the attachments for the bid which may include supplemental terms and conditions.

File Name	Description	File Size
Winter-1.jpg (Winter-1.jpg)		105,542 bytes

Do you accept the terms & conditions of the bid? Yes Yes with exceptions No

If you do not fully accept the terms & conditions, please note the exceptions below:

If the Terms and Conditions are accepted, select **Yes** and click **Save & Continue**. If the vendor selects **Yes with Exceptions** or **No**, the field below becomes required and the vendor must state the reasons for not accepting the Terms and Conditions.

Attachments Tab

The Attachments tab allows the Vendor to add any necessary documentation for the Quote. This can include specifications, statement of work, pricing sheets and any other relevant information.

Quote 00000147 - Tim's Laptops

General Items Questions Subcontractors Notes Terms & Conditions Attachments Summary Back to Bid

i Marking an item "Confidential" will ensure the document is only seen by relevant personnel and will not be displayed publicly.

i Click **Add Attachment** to add attachments.

No Attachments

To add an attachment, click **Add Attachments**. The following screen will appear.

Add File

i **Name** is the display name for the file that will appear where attachment repository files are displayed. It can be different from the name on disk and can contain alphanumeric characters, spaces, and special characters up to a maximum length of 200.

Name*:

Description:

File*:

Location: vendor/000000003/quote

Responding to a Solicitation

Quick Reference Guide

Help Desk: (855) 800-5046

Use the Browse button to search for the file to upload from your computer. Please note that individual attachment documents shall not exceed 10 MB. Once chosen, the vendor can edit the name of the file as well as giving it a description. Once completed, click **Save & Exit**.

The Attachments tab will then list all attachments on the Quote. The Vendor may select an attachment and mark it Confidential. Marking a document Confidential signals your desire for the document not to be visible publicly. **However, the County will determine if this document is part of public record.**

Quote 00000147 - Tim's Laptops

General Items Questions Subcontractors Notes Terms & Conditions **Attachments(1)** Summary [Back to Bid](#)

i Marking an item "Confidential" will ensure the document is only seen by relevant personnel and will not be displayed publicly.

Name	Description	Confidential	Attached By	Attached Date	Delete
Quick Reference Guide.doc		<input checked="" type="checkbox"/>	Timothy Garza	09/02/2009	<input type="checkbox"/>

Save & Continue Add Attachment

Summary Tab

The Summary Tab is the Vendor's opportunity to review all the information entered on the Quote. If any changes need to be made, select the tab to go back to that screen and edit the information.

The **Print** button allows the Vendor to print a copy for records.

The **Submit Quote** button will submit the quote into the system. No changes can be made to the Quote unless the vendor withdraws the Quote.

The **Cancel Quote** button cancels the quote.

Quote 00000147 - Tim's Laptops

General Items Questions Subcontractors Notes Terms & Conditions Attachments(1) **Summary** [Back to Bid](#)

Header Information

Quote #: 00000147 Bid #: **0000093** Status: In progress

Organization: Morning Training Sessions

Description: Monitors Delivery Days: 0 Discount Percent: 0.0

Bid Flag: Alternate Bid: No Shipping Terms:

Freight Terms: Ship Via Terms: Payment Term:

Promised Date: Info Contact: Quote Total: \$4,000.00

Comment: Date Last Updated: 09/02/2009 10:25:21 AM User last Updated: Timothy Garza

Vendor accepts the terms & conditions with no exceptions.

Questions:

Question #	Required	Question	Response
1	No	What brand of monitor is it?	

Attachments: [Quick Reference Guide.doc](#)

Item Information

Print Sequence # 1.0 : (204 - 54) 20" Flat Screen Monitor

Quantity	UOM	Unit Cost	Discount %	Tax Rate	Freight	Extended Amount	No Bid	No Charge
10.0	EA	\$400.00	0.0%	0.0%	\$0.00	\$4,000.00	No	No

Print Submit Quote Cancel Quote

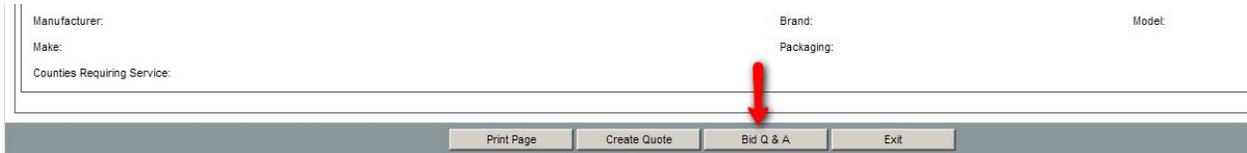
Responding to a Solicitation

Quick Reference Guide

Help Desk: (855) 800-5046

Viewing and Submitting a Question

Vendors may also be able to view and submit questions regarding a solicitation through ePro by clicking on the **Bid #** listed on the Bid tab. They can scroll down to the bottom of the page and click on the **Bid Q&A** button.



Any previously published questions and answers will be visible here. If enabled by the procurement officer, the vendor will now have the ability to add new questions.

Open Market Bid 05-00085

Add new questions:

Question Subject	Question (max: 2000 characters)
Bid Amendment(s) and Due Date	Will the CEA issue any addenda that will change the bid due date?

Save & Exit Save & Continue Reset Cancel & Exit

Withdrawing a Quote

Once the quote is submitted, no changes can be made. If changes need to be made either due to an amendment or by vendor decision, the Withdraw Quote button will appear on the Summary tab. Click this button, then choose the Reopen Button at the bottom of the Summary tab if you would like to modify and resubmit the response. The Quote will be fully open to make changes.

Please note the Quote must be resubmitted before the Bid Opening Date/Time or the Quote shall not be accepted.

Amendments and Acknowledgements

If the County makes an amendment to the Bid, the Vendor must acknowledge the amendment. If the vendor has previously submitted a Quote, was originally notified about the Bid, or has viewed and acknowledged the Bid, the vendor will receive an email and the amendment will be shown on the Seller homepage. On the Bids tab, a new section will appear labeled as Bid Amendments Unacknowledged.

Bids / Bid Amendments (Un-Acknowledged)

Bid #	Organization	Alternate Id	Buyer	Description	Bid Opening Date	Pre-Bid Conference	Bid Holder
0000068	Afternoon Training Sessions		Afternoon Trainee1	printing services	08/25/2009 01:30:00 PM	Scheduled	
0000069	Default Organization		Chris Harris	Laptops and related equipment	08/27/2009 09:15:00 AM		
0000070	Morning Training Sessions		Morning Trainee10	Police Bicycles	08/27/2009 09:15:00 AM	Scheduled	
0000072	Morning Training Sessions		Morning Trainee8	computer software	08/27/2009 09:15:00 AM	Scheduled	
0000073	Morning Training Sessions		Morning Trainee6	Residential Placement	08/27/2009 09:15:00 AM		

[View More...](#)

Responding to a Solicitation

Quick Reference Guide

Help Desk: (855) 800-5046

Clicking on the Bid # will bring the vendor to the Bid Detail view. Once the vendor has read the amendments, click the Acknowledge Amendments button. Please note that if the Amendment makes a change to the items, the Vendor may wish to withdraw any quotes in the system and make updates based on the Amendment before resubmitting the quote.

Amendments:		
Amendment #	Amendment Date	Amendment Note
1	09/02/2009 10:46:04 AM	Header 1. Bid Opening Date changed from "09/30/2009 09:49:00 AM" to "10/30/2009 09:49:00 AM".

Item Information						
Item # 1: (204 - 54) 20" Flat Screen Monitor						
Qty	Unit Cost	UOM	Total Discount Amt.	Tax Rate	Tax Amount	Total Cost
10.0		EA - Each				
Manufacturer:		Brand:		Model:		
Make:		Packaging:				

Acknowledge Amendment(s)	Print Page	Create Quote	Bid Q & A	Exit
--------------------------	------------	--------------	-----------	------

Revisions

Once the bid is officially opened, during the tabulation and evaluation process the County may ask the Vendor for a Revision. The Revision may be clarifications or a Best and Final Offer. The vendor will receive an email containing the instructions for the Revision.

Request for Revision				
Quote #	Organization	Bid #	Bid Opening Date	Date Last Modified
00000133-R1	Afternoon Training Sessions	00000087	08/27/2009 01:30:00 PM	08/27/2009 01:34:27 PM

On the Seller Homepage, the Request for Revision section will appear. The Vendor can click on the Quote number, and then following the guide above for responding to a bid they can edit and update the revised quote. Once completed, the quote must be submitted via the Submit Quote button on the Summary Tab.

Accessing POs and Change Orders

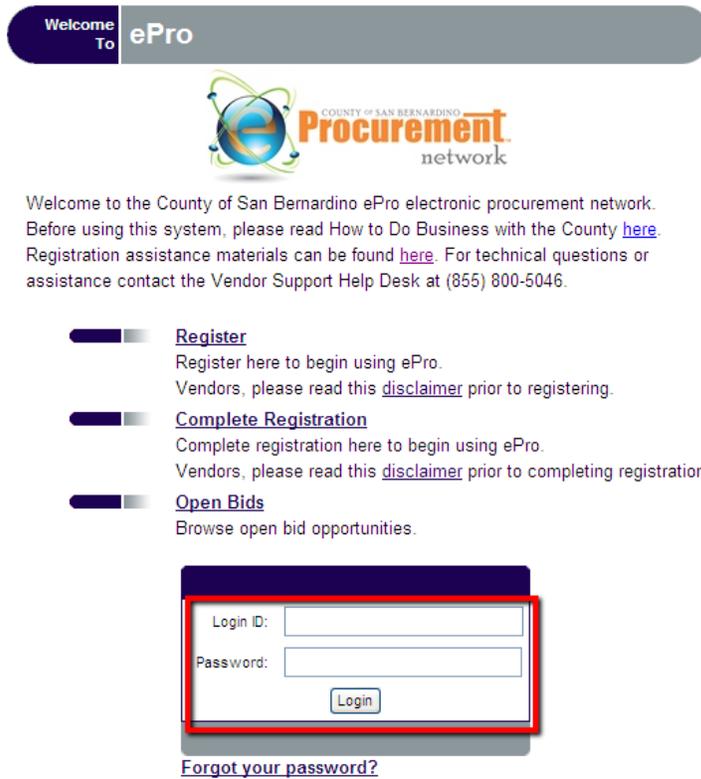
Help Desk: (855) 800-5046

Quick Reference Guide

This quick reference guide is designed to help vendors understand how to access Purchase Orders (POs) and Change Orders sent to them in the San Bernardino County new eProcurement system, ePro. PO and Change Order notifications will be sent to the primary email address associated with the vendor's profile, not to individual vendor users. If your entity has received a notification about a PO or Change Order via email, follow the steps in this guide to access and review the document.

Login to ePro

The first step is to login to ePro at <https://epro.sbcounty.gov/epro/> using your login ID and password. The email you received notifying you about the PO or Change Order will contain a link to the system that you can click.



Welcome To ePro



Welcome to the County of San Bernardino ePro electronic procurement network. Before using this system, please read How to Do Business with the County [here](#). Registration assistance materials can be found [here](#). For technical questions or assistance contact the Vendor Support Help Desk at (855) 800-5046.

- Register**
Register here to begin using ePro. Vendors, please read this [disclaimer](#) prior to registering.
- Complete Registration**
Complete registration here to begin using ePro. Vendors, please read this [disclaimer](#) prior to completing registration.
- Open Bids**
Browse open bid opportunities.

Login ID:

Password:

[Forgot your password?](#)

Finding a Purchase Order

After login you will see your home page and tabs underneath the Welcome message. To find a PO or Change Order, click on the PO tab. The POs and/or POs with Change Orders that you have not yet acknowledged will be listed first. You can access a PO by clicking on the link in the **Purchase Order #** column on the left side of the screen.

Home - Welcome Back Vendor User

News(2) Bids(70) **PO(14)** Quotes(29)

Purchase Orders / Change Orders (Un-Acknowledged)

Purchase Order #	Organization	Purchase Order Date	Fiscal Year	Description	Status	Vendor Name	Total	Number of Change Orders
A05PO10-000199	State Procurement Office	05/10/2010	2010	AutoGSD Architecture Subscription Renewal	3PS - Sent	Periscope Holdings, Inc.	\$0.00	1

Acknowledging a Purchase Order

Upon selecting a PO, you will be asked to acknowledge receipt of the PO and its Change Orders before it will display. Acknowledging a PO indicates that you are aware of it and that you will respond to it.

Check both of the check boxes on the left and click on the **Proceed** button to:

- Acknowledge your receipt of the PO and its Change Orders, and
- Notify the requestor at the County that you have received the PO.

Download Acknowledgement

I am acknowledging receipt of this purchase order and/or its change order(s).

Notify requestor of receipt of this purchase order and/or its change order(s).

Viewing a Purchase Order

The PO will be displayed with the number prominently displayed in the upper left hand corner of the document.

Open Market Purchase Order ADSP010-000390

Summary | Subcontractors

Header Information

Purchase Order Number: ADSP010-000390	Release Number: 0	Short Description: Laptops
Status: 3PS - Sent	Purchaser: System Administrator	Receipt Method: Quantity
Fiscal Year: 2010	PO Type: Open Market	Minor Status:
Department: ABA - Accountancy Board	Location: ABA - Accountancy Board	Type Code:
Alternate ID:	Entered Date: 09/29/2010 04:30:51 PM	Control Code:
Days ARO: 0	Retainage %: 0.00%	Discount %: 0.00%
Required By Date:	Promised Date:	Actual Cost: \$4,000.00
Contact Instructions:	Tax Rate:	
Ship-to Address: Arizona Department of Homeland Security 1700 W. Washington St. Suite 201 Phoenix, AZ 85007 US Email: test@goperiscope.com Phone: (602)542-7056	Bill-to Address: Arizona Department of Homeland Security 1700 W. Washington St. Suite 201 Phoenix, AZ 85007 US Email: test@goperiscope.com Phone: (602)542-7056	

Master Blanket/Contract End Date (Maximum):

Attachments: [Uniform Terms & Conditions](#), [Uniform Instructions](#)

Additional Documentation about the PO

Accessing POs and Change Orders

Help Desk: (855) 800-5046

Quick Reference Guide

PO Terms

Preferred Delivery Method: Email

Remit-to Address: Periscope Holdings
211 East 7th Street
Suite 1100
Austin, TX 78701
US
Email: test@goperiscope.com
Phone: (555)555-5555

Payment Terms: Net 30

Shipping Method:

Shipping Terms:

Freight Terms:

PO Mailing Address: Periscope Holdings
211 East 7th Street
Suite 1100
Austin, TX 78701
US
Email: test@goperiscope.com
Phone: (555)555-5555

Payments

There are no payments.

Item Information

Item #	Print Sequence	Item Description								Total Cost
		Quantity	Unit Cost	Net Unit Cost	UOM	Total Discount Amt.	Tax Rate	Tax Amount	Freight	
1	1.0	(204 - 54) Laptop computer, 160 GB hard drives, 2 GHZ processor, 4 GB of RAM,								\$4,000.00
		10.0	\$400.00	\$400.00	EA - Each	\$0.00		\$0.00	\$0.00	

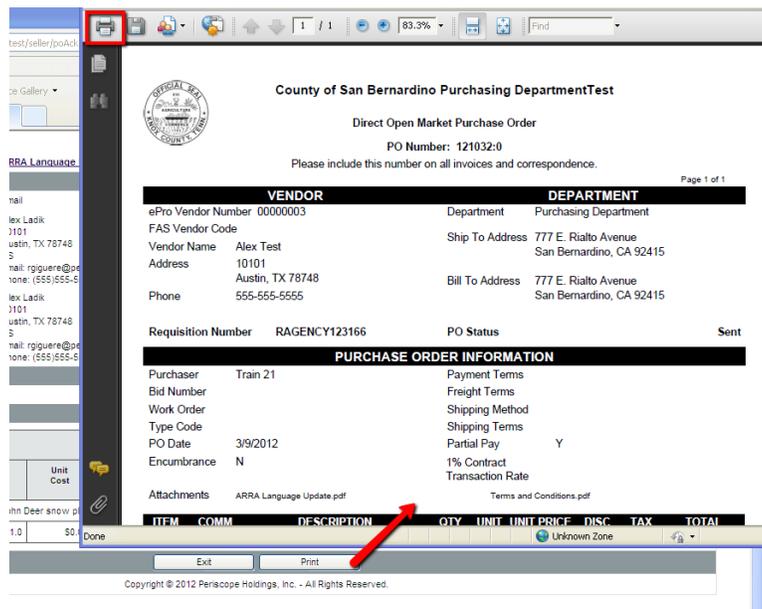
Exit Print

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Details about ordered line-items

Printing a Purchase Order

All POs issued to you will stay within ePro indefinitely, so you do not need to print it out. However, if you would like to print out a paper copy of a PO, click on the **Print** button on the bottom of the screen while looking at the PO. ePro will preview the PO on the screen and you can then print the PO to the printer of your choice or save it to your computer.



test/seller/poAd

County of San Bernardino Purchasing Department

Direct Open Market Purchase Order

PO Number: 121032:0

Please include this number on all invoices and correspondence.

Page 1 of 1

VENDOR		DEPARTMENT	
ePro Vendor Number	00000003	Department	Purchasing Department
FAS Vendor Code		Ship To Address	777 E. Rialto Avenue San Bernardino, CA 92415
Vendor Name	Alex Test	Address	10101 Austin, TX 78748
Phone	555-555-5555	Bill To Address	777 E. Rialto Avenue San Bernardino, CA 92415

Requisition Number RAGENCY123166 PO Status Sent

PURCHASE ORDER INFORMATION			
Purchaser	Train 21	Payment Terms	
Bid Number		Freight Terms	
Work Order		Shipping Method	
Type Code		Shipping Terms	
PO Date	3/9/2012	Partial Pay	Y
Encumbrance	N	1% Contract	
		Transaction Rate	

Attachments ARRA Language Update.pdf Terms and Conditions.pdf

ITEM	COMM	DESCRIPTION	QTY	UNIT	UNIT PRICE	DISC	TAX	TOTAL
1.0					\$0			Done

Exit Print

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Accessing POs and Change Orders

Help Desk: (855) 800-5046

Quick Reference Guide

Finding and Acknowledging a Change Order

You will be notified of Change Orders if an agency has made changes to a PO they've previously sent you. Notifications of Change Orders will also be sent to the primary email address associated with the vendor's profile, and not to individual users established for the vendor's profile. Change Orders are accessed in exactly the same way as the PO, and are visible on the PO document in the **Change Orders** section.

Just like POs, you will be asked to acknowledge receipt of Change Orders upon selecting the PO to view. Check both of the check boxes on the left and click on the **Proceed** to view the PO and its Change Order(s).

Open Market Purchase Order ADSP010-000390

[Summary](#) [Subcontractors](#)

Header Information

Purchase Order Number: ADSP010-000390	Release Number: 0	Short Description: Laptops
Status: 3PS - Sent	Purchaser: System Administrator	Receipt Method: Quantity
Fiscal Year: 2010	PO Type: Open Market	Minor Status:
Department: ABA - Accountancy Board	Location: ABA - Accountancy Board	Type Code:
Alternate ID:	Entered Date: 09/29/2010 04:30:51 PM	Control Code:
Days ARO: 0	Retainage %: 0.00%	Discount %: 0.00%
Required By Date:	Promised Date:	Actual Cost: \$6,000.00
Contact Instructions:	Tax Rate:	
Ship-to Address: Arizona Department of Homeland Security 1700 W. Washington St. Suite 201 Phoenix, AZ 85007 US Email: test@goperiscope.com Phone: (602)542-7056	Bill-to Address: Arizona Department of Homeland Security 1700 W. Washington St. Suite 201 Phoenix, AZ 85007 US Email: test@goperiscope.com Phone: (602)542-7056	

Master Blanket/Contract End Date (Maximum):

Attachments: [Uniform Terms & Conditions](#), [Uniform Instructions](#), [COPE.pdf](#)

PO Terms

Preferred Delivery Method: Email		
Remit-to Address: Periscope Holdings 211 East 7th Street Suite 1100 Austin, TX 78701 US Email: test@goperiscope.com Phone: (555)555-5555	Payment Terms: Net 30	Shipping Method:
	Shipping Terms:	Freight Terms:

Change Orders

Change Order #	Change Order Note	Change Order Date	Bilateral Change Order
1	Item 1 1. Quantity changed from "10" to "15.0".	09/29/2010 04:43:21 PM	No

Finding Bilateral Change Orders

Some Change Orders may require your approval before they are applied to the PO. These are referred to as "Bilateral Change Orders." These are primarily used when an amendment is needed to a term contract you have with the County. Notifications of approval requests for Bilateral Change Orders will be sent to individual user accounts established for your vendor profile, via email.

After you've received this notification, the Change Order is visible from your homepage within ePro under the PO tab within the **Change Orders Pending My Approval** section.



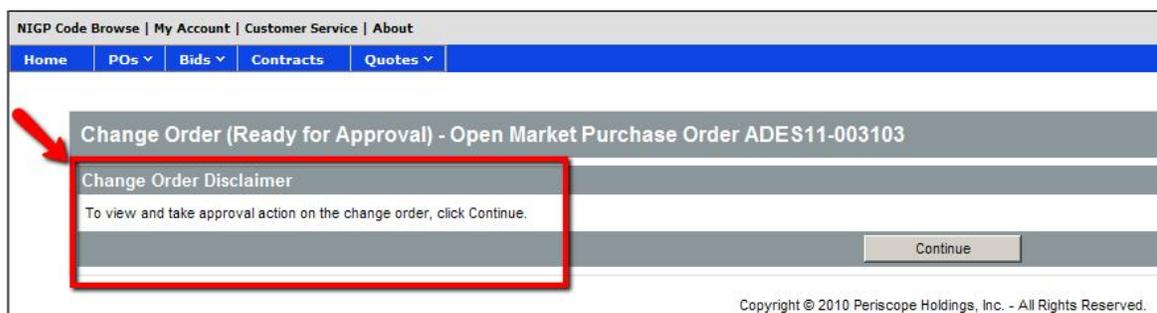
Purchase Order #	Change Order #	Purchase Order Date	Description	Dept/Loc	Purchaser	Total
ADES11-003103	1	09/23/2010	Computer Supplies	ADESI/ADES	Don Hagman	\$978.30

Purchase Orders / Change Orders (Un-Acknowledged)

Approving Bilateral Change Orders

If you have been notified of a Change Order that you need to approve, upon selecting the document, follow the steps below to take action:

1. The **Change Order Disclaimer** screen will appear. You will need to accept it by clicking the **Continue** button.



NIGP Code Browse | My Account | Customer Service | About

Home | POs | Bids | Contracts | Quotes

Change Order (Ready for Approval) - Open Market Purchase Order ADES11-003103

Change Order Disclaimer

To view and take approval action on the change order, click Continue.

Continue

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2. Review the Change Order onscreen.

NOTE: If you want to review the entire PO, click the *Cancel and Exit* button. This will return you to your homepage. Select the PO tab again, then click on the PO# from the *Purchase Orders - Sent* section.



Change Order (Ready for Approval) - Open Market Purchase Order ADES11-003103

Comment for the whole change order:

Header/Item Changes			
Modified Field	Item #	Description	User
Quantity	1	Quantity changed from "10" to "20.0"	Don

Approval Actions

Options: Approve Disapprove Change Order

Comment: _____

Cancel and Exit Save & Continue

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3. Select to "Approve" or "Disapprove Change Order" in the **Approval Actions** section. Selecting "Approve" will date and timestamp your approval of the Change Order. Selecting "Disapprove Change Order" will send the Change Order back to the County.

NOTE: If you select "Disapprove Change Order," you **must** provide a **Comment** field with the reasons for the disapproval.

4. Select the **Save & Continue** button. You will be asked to verify your selection. To do so, click **OK**. You have now responded to the approval request.



Change Order (Ready for Approval) - Open Market Purchase Order ADES11-003103

Comment for the whole change order:

Header/Item Changes			
Modified Field	Item #	Description	User
Quantity	1	Quantity changed from "10" to "20.0"	Don

Approval Actions

Options: Approve Disapprove Change Order

Comment: _____

Are you sure you want to approve this change order?

OK Cancel

Cancel and Exit Save & Continue

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Each vendor that registers with ePro must have a unique tax identification number. However, if your entity does business under multiple names, or has subsidiaries that utilize the same tax ID, you may want to register each of these DBAs or subsidiaries separately so that each can receive and manage solicitation opportunities, contracts and purchase orders within ePro that are specific to them. In order for each of these DBAs or subsidiaries to have standalone vendor records in ePro using the same tax ID, follow the instructions provided below.

Registering a Vendor in ePro

In order to setup a DBA or subsidiary in ePro, you must first have successfully registered one vendor within ePro with the tax ID that these entities will use. Once you have registered as a vendor within ePro, you can then allow other associated entities to register with the same tax ID as that original vendor.

If you attempted to register and have seen the **Federal Tax ID Exists** message, then another entity is already registered within ePro with the same tax ID. If you are unaware of who has registered within ePro with your tax ID, then please follow the instructions provided. **Do not enter inaccurate tax ID information into ePro, as this information is utilized by the County for tax and payment purposes.**

Federal Tax ID Exists

Federal Tax ID: 123456789 already exists in our system. If you believe this is in error, contact us at test@cooperiscope.com for registration assistance. Include the Federal Tax ID you are using for registration and contact information. We will contact you via e-mail or phone with access information.

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If an affiliated entity has registered within ePro with the tax ID that you will need to utilize, then please contact them and have them follow the instructions provided within this guide, which will allow you to register with the same tax ID.

Sending an Associated Organization Registration Link

ePro will allow you to register a new vendor with the same tax ID as a previously setup vendor if you access ePro using a link sent to you by that previously set up vendor.

In order to send this Associated Organization registration link, a user from that previously registered vendor with the Seller Administrator role will need to login to ePro and ensure that this role is selected in the top right corner of the screen. The user that initially registered the vendor will automatically have this role, along with any other users this person setup with this role.

Adding an Associated Organization (or DBA) Quick Reference Guide



The screenshot shows the Seller Administrator interface. At the top right, the user role is "Seller Administrator". The main navigation bar includes "NIGP Code Browse | My Account | Customer Service | About" and the date "July 8, 2010 9:30:51 AM MST". Below this, a secondary navigation bar has "Home | Org Maintenance | User Maintenance | Add User" and "Vendor User". The main content area is titled "Maintenance Home Page for: Periscope Holdings, Inc." and contains four cards:

- Maintain Organization Information**: This section is used for maintaining organization information.
- Maintain Users on this Account**: This section is used to maintain users for the organization.
- Add Users on this Account**: This section is used to add users to the organization.
- Add Associated Organization**: This section is used for adding an organization with the same Tax ID.

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Once the Seller Administrator role has been selected, four links will appear below. Clicking the far right link, **Add Associated Organization**, will enable the user to send a notification and the DBA registration link to the individuals that will register separate entities within ePro with the same tax ID.



This screenshot is identical to the one above, but the "Add Associated Organization" card is highlighted with a red rectangular border to indicate it is the focus of the next step.

Upon selecting **Add Associated Organization**, the **Send Mail** screen will appear. Completing the following fields on this screen and selecting the **Send** button on the bottom of the screen will send the email and the link to the desired recipients.

Adding an Associated Organization (or DBA) Quick Reference Guide

- **To** – The email addresses of the individuals that will receive this email and the DBA registration link which allows them to register a vendor with the same tax ID.
- **CC** – The email addresses of additional individuals that should receive this email.
- **Send confirmation email to (your email address)** – When checked, an email will be sent to the sender confirming that the email was sent and listing the recipients.
- **From** – This will automatically contain the sender's email address and cannot be edited.
- **Subject** – The subject of the email that will be sent. This automatically populates with the following language, but can be edited:

(Vendor Name) requests you register in the County's ePro system

- **Text** – The body of the email that will be sent. This automatically populates with the following language, which cannot be changed, but text typed into this field will appear *before* the standard language below.

Use the link below to register with the ePro system using the same tax ID as (Vendor Name).

Send Mail

i Use the email form below to request that the associated organizations register in BSO. The link provided below must be used in order to register with the same tax ID.

To*:

CC:

Send confirmation email to charris@goperiscope.com

From:

Subject*:

Text:

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Registering as an Associated Organization

Once the email notification and the Associated Organization registration link have been received, you will be able to register a separate entity with the same tax ID as the vendor that sent the email and link. Simply click the link received in the email and the ePro vendor registration screen will appear.

Register

Company Information ?

<p>Company Name*: <input type="text"/></p> <p>Business Description: <input type="text"/></p> <p>Mailing Address Line 1*: <input type="text"/></p> <p>Address Line 2: <input type="text"/></p> <p>Address Line 3: <input type="text"/></p> <p>Address Line 4: <input type="text"/></p> <p>Country*: US - United States of America</p> <p>City*: <input type="text"/></p> <p>ZIP*: <input type="text"/></p> <p>Company Phone*: <input type="text"/></p> <p>Company Email*: <input type="text"/></p> <p>State of Incorporation: ▼</p> <p>Preferred Delivery Method: Email</p> <p>Would you like to be registered as an emergency supplier in the case of an emergency? <input type="radio"/> Yes <input checked="" type="radio"/> No <small>Note: Emergency suppliers must be available 24 hours a day, 7 days a week.</small></p> <p>Emergency Phone*: <input type="text"/></p> <p>Emergency Contact*: <input type="text"/></p> <p>Emergency Info Comment: <input type="text"/></p>	<p>State/Province*: ▼</p> <p>County: <input type="text"/></p> <p>Company FAX: <input type="text"/></p> <p>Tax ID #: <input type="text"/></p> <p>Year of Incorporation: <input type="text" value="0"/></p> <p>Ext.: <input type="text"/></p> <p>Emergency Email*: <input type="text"/></p>
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Administrative User Information ?

<p>Salutation: ▼</p> <p>First Name*: <input type="text"/></p> <p>Job Title*: <input type="text"/></p> <p>Email*: <input type="text"/></p> <p>Login ID*: <input type="text"/></p> <p>New Password*: <input type="text"/></p> <p>Login Question: <input type="text"/></p>	<p>Last Name*: <input type="text"/></p> <p>Department: <input type="text"/></p> <p>Phone*: <input type="text"/> - <input type="text"/></p> <p>Confirm Password*: <input type="text"/></p> <p>Login Answer: <input type="text"/></p>
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Add Another Address
Continue Registration
Reset
Cancel

Note that the same user account cannot have access to multiple vendors within ePro. Therefore, if you need to be able to login on behalf of different vendor records, you will need to setup a different ePro account for each one.

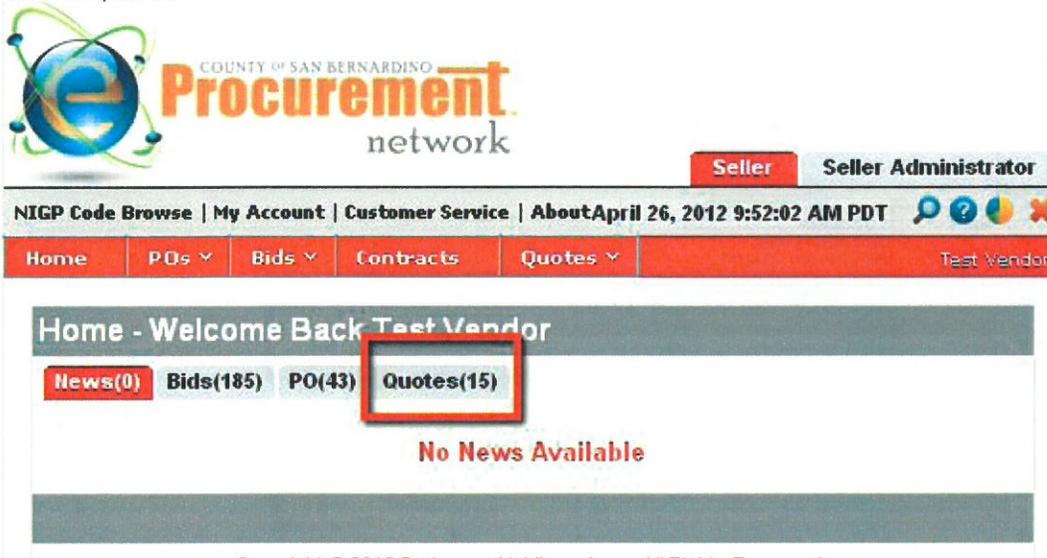
Informal Quote Response Quick Reference Guide

Help Desk: (855) 800-5046

An informal quote is a simple price quote – an electronic version of the phone quote. Vendors may respond by adding a price for the items listed, but cannot provide any additional narrative input or attach documents.

Accessing Informal Quote requests

You may receive an email inviting you to provide an informal quote, or you may view the list of all available informal quote requests once you have logged into ePro and clicked on your Seller role. Click on the Quotes tab to access all the different sorts of quotes.

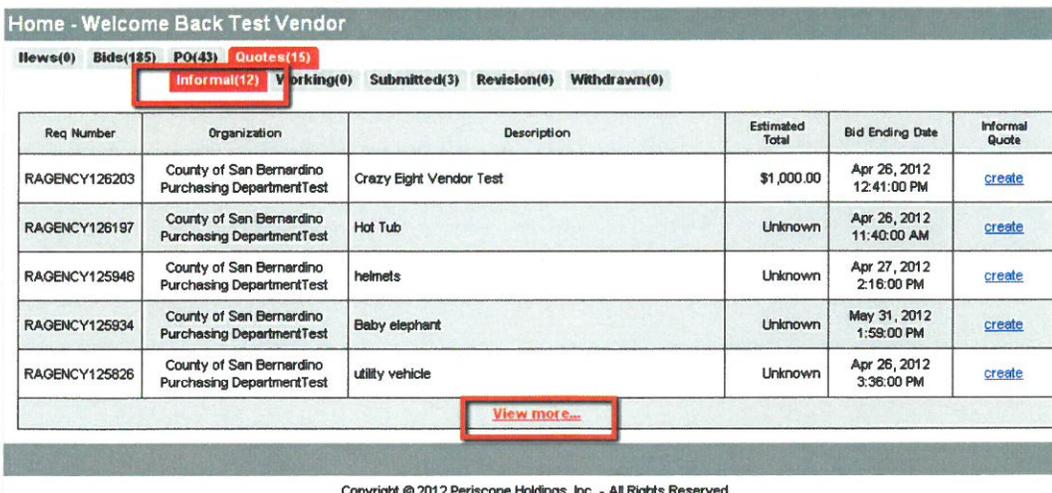


The screenshot shows the eProcurement network interface. At the top, there is a navigation bar with 'Seller' and 'Seller Administrator' tabs. Below this is a search bar and a date/time display: 'About April 26, 2012 9:52:02 AM PDT'. A secondary navigation bar contains 'Home', 'POs', 'Bids', 'Contracts', 'Quotes', and 'Test Vendor'. The 'Quotes' tab is highlighted. Below the navigation bar, a dashboard area shows 'Home - Welcome Back Test Vendor' with several buttons: 'News(0)', 'Bids(185)', 'PO(43)', and 'Quotes(15)'. The 'Quotes(15)' button is highlighted with a red box. Below these buttons, the text 'No News Available' is displayed.

Under the Quotes tab, there are 5 sub-tabs. The left-most is the Informal tab. Next to it is a number in parentheses telling you how many informal quote requests are visible behind that tab. The other tabs – Working, Submitted, Revision, and Withdrawn all refer to quotes in the formal solicitation process, and have no bearing on Informal Quotes.

Choose the informal quote tab, and a list of the most recent 5 available informal quotes will be displayed. If there are more than 5 available, then a link is provided to 'View More'

The Bid Ending Date shown is the deadline to submit an informal quote for a given requisition. After the Bid Ending Date and Time, the informal quote will no longer display and you will not be able to submit a quote. Time is the server time shown at the top of the screen just under the Seller and Seller Administrator tabs.



The screenshot shows the eProcurement network interface displaying a list of informal quotes. The 'Quotes(15)' tab is highlighted, and the 'Informal(12)' sub-tab is also highlighted with a red box. Below the tabs, a table lists the most recent 5 available informal quotes. The table has columns for Req Number, Organization, Description, Estimated Total, Bid Ending Date, and Informal Quote. A 'View more...' link is highlighted with a red box at the bottom of the table.

Req Number	Organization	Description	Estimated Total	Bid Ending Date	Informal Quote
RAGENCY126203	County of San Bernardino Purchasing DepartmentTest	Crazy Eight Vendor Test	\$1,000.00	Apr 26, 2012 12:41:00 PM	create
RAGENCY126197	County of San Bernardino Purchasing DepartmentTest	Hot Tub	Unknown	Apr 26, 2012 11:40:00 AM	create
RAGENCY125946	County of San Bernardino Purchasing DepartmentTest	helmets	Unknown	Apr 27, 2012 2:16:00 PM	create
RAGENCY125934	County of San Bernardino Purchasing DepartmentTest	Baby elephant	Unknown	May 31, 2012 1:59:00 PM	create
RAGENCY125826	County of San Bernardino Purchasing DepartmentTest	utility vehicle	Unknown	Apr 26, 2012 3:36:00 PM	create

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Informal Quote Response

Quick Reference Guide

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Creating the Informal Quote

To create an informal quote response to one of the Requisitions listed, click the blue 'create' link in the Informal quote column.

You will see a brief description of the Requisition information, along with any attachments the requestor has added to further document the purchase. Download the attachments by clicking on each link, and view them to assist you in creating your quote.

Informal Quote - Requisition

Header Information

Requisition Number	RAGENCY126203	Description	Crazy Eight Vendor Test
Buyer	Laurie Rozko Phone: (909)555-1212 test@periscopeholdings.com		
Ship To	Administration 777 E. Rialto Avenue San Bernardino, CA 92415	Bill To	Administration 777 E. Rialto Avenue San Bernardino, CA 92415

Attachments

[Non-Competitive Board Agenda Item Checklist.pdf](#) ,
 [Non-Competitive Purchase Template.pdf](#) ,
 [Unbudgeted Fixed Asset Template.PDF](#) ,
 [FM Supplies 2 , Contract Transaction Charge \(CTC\).pdf](#)

Sort by Column: Print Sequence Sort Descending Go

Req Item Info	Quantity	Unit Cost	UOM	Tax Rate	Freight	Extended Amount	Quote Total	No Bid
Item # : 1 Print Sequence: 1.0 (080 - 78) Eight balls Quantity(UOM) : 100.00(EA) Unit Cost: \$10.00	100.0	10.00	EA - Each	<input type="text" value=""/>	0.00	\$1000.00	No Charge	<input type="checkbox"/>
						\$1000.00	\$0.00	

Please save your changes before sorting . Otherwise, your changes will be lost.

Save & Exit
Save & Continue
Exit

Next to each item on the requisition is a place for you to input your unit cost. At the far right there is an option for you to designate 'No Bid' for a particular item if you wish to respond, but not bid for that particular item.

Make your desired entries, then click either Save & Exit – to return to the list of informal quotes, or Save & Continue to remain on this page and make additional changes, or Exit to leave this page without making any changes.

Once you click either Save choice, your price quote will be communicated to the purchaser on the requisition and your Informal quote has been submitted.