Help Desk: (855) 800-5046

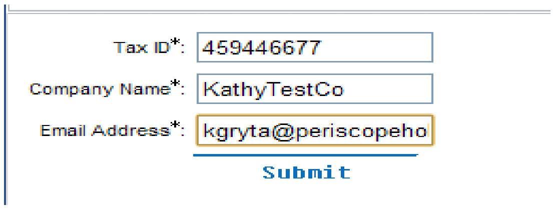
Vendor Registration
Quick Reference Guide

Beginning the Registration Process

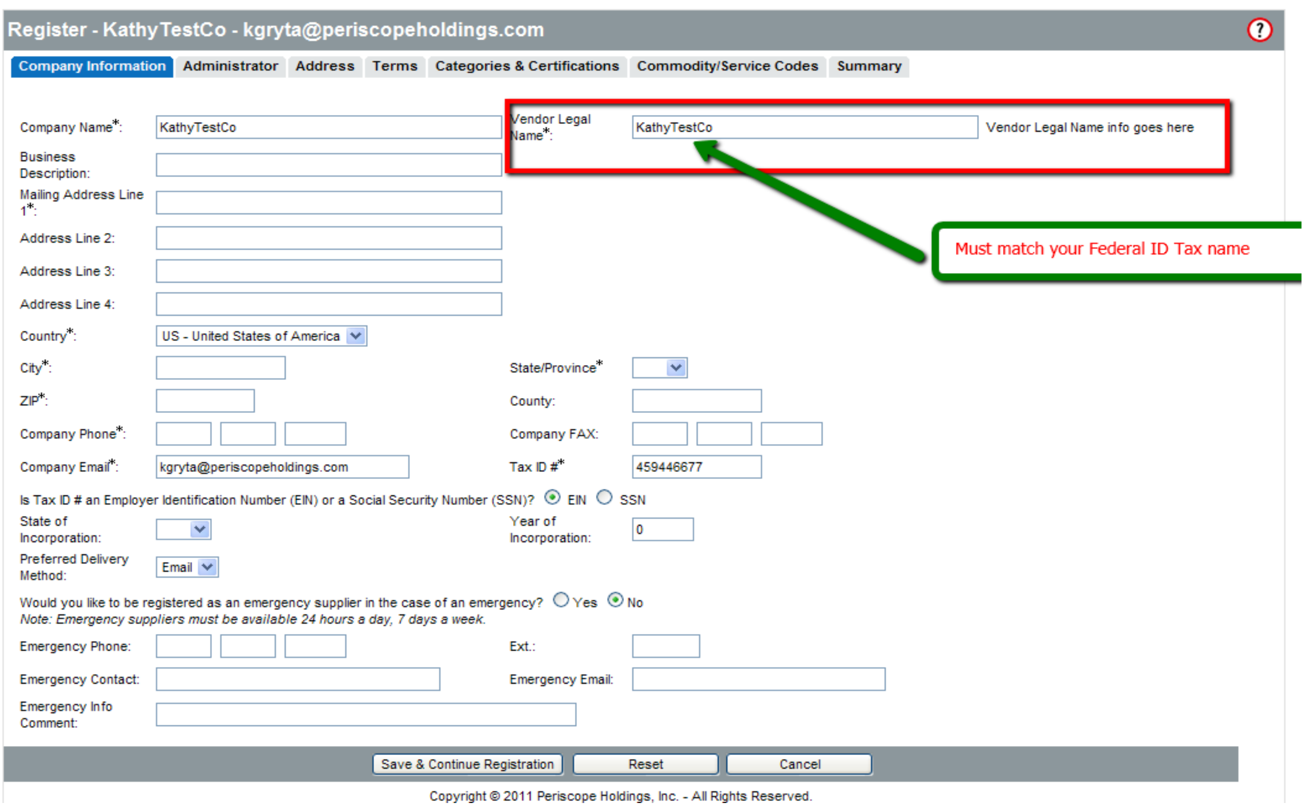
In order to receive notifications about bid opportunities or to be issued purchase orders (POs) through ePro, vendors must be registered within the system. Vendors register themselves by accessing the ePro login screen and selecting **Register**.

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.



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.

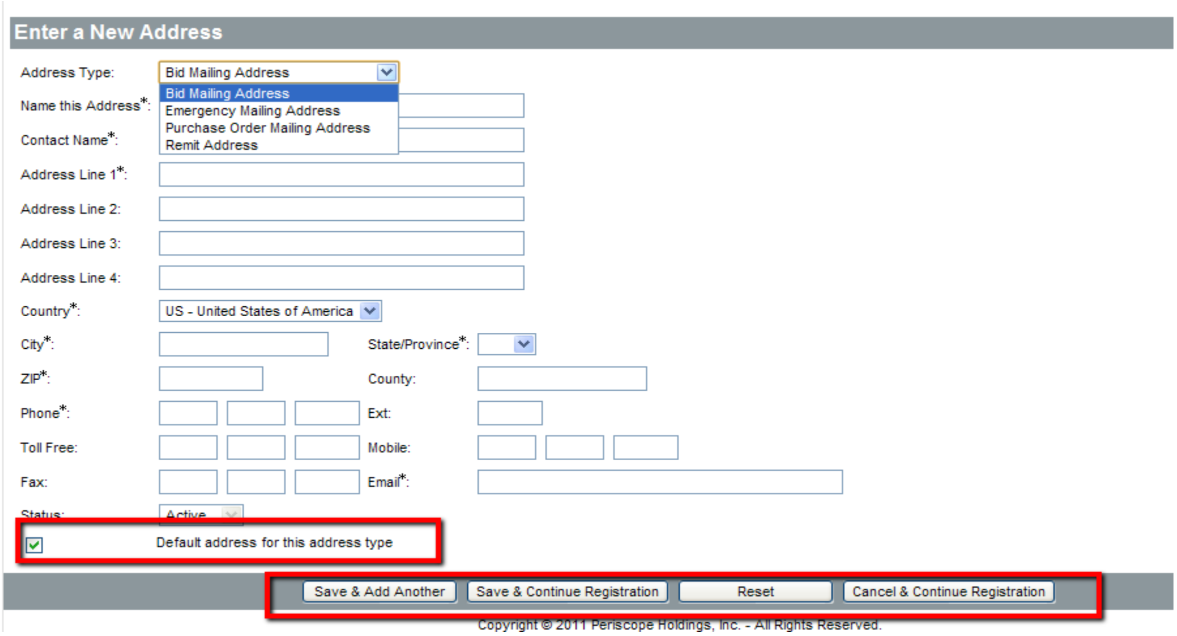


In the **Administrative User Information** section, provide the information for an administrative user for your organization in the system. This user will be designated as the "**Seller Administrator**" and will be responsible for updating organizational information and adding new users.

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.

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

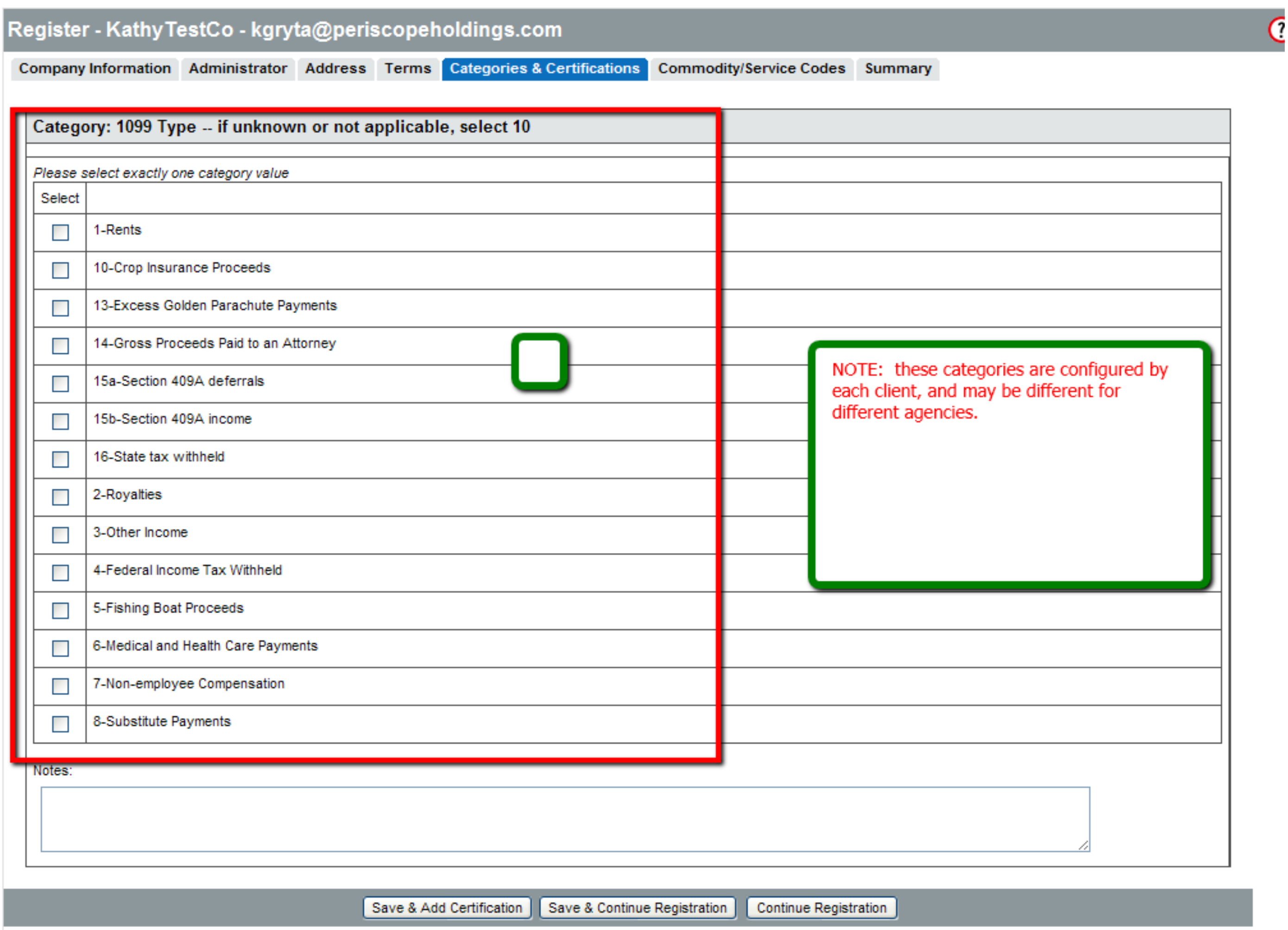
If you add addresses, you may elect to designate default PO, Bid, and Remit addresses.



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.

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.

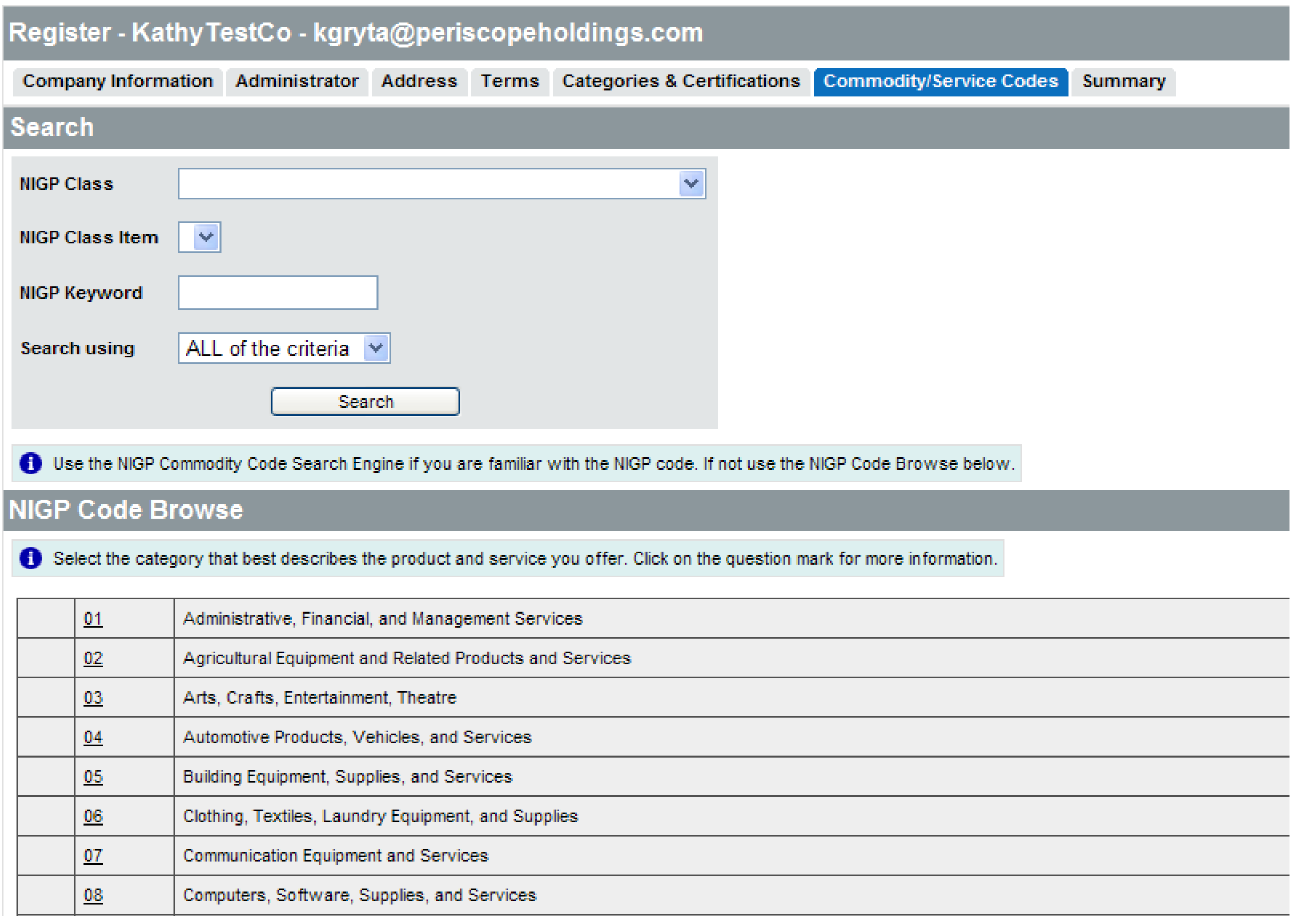


After you have completed this screen, click **Save & Continue Registration** at the bottom of the screen.

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**.



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

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?

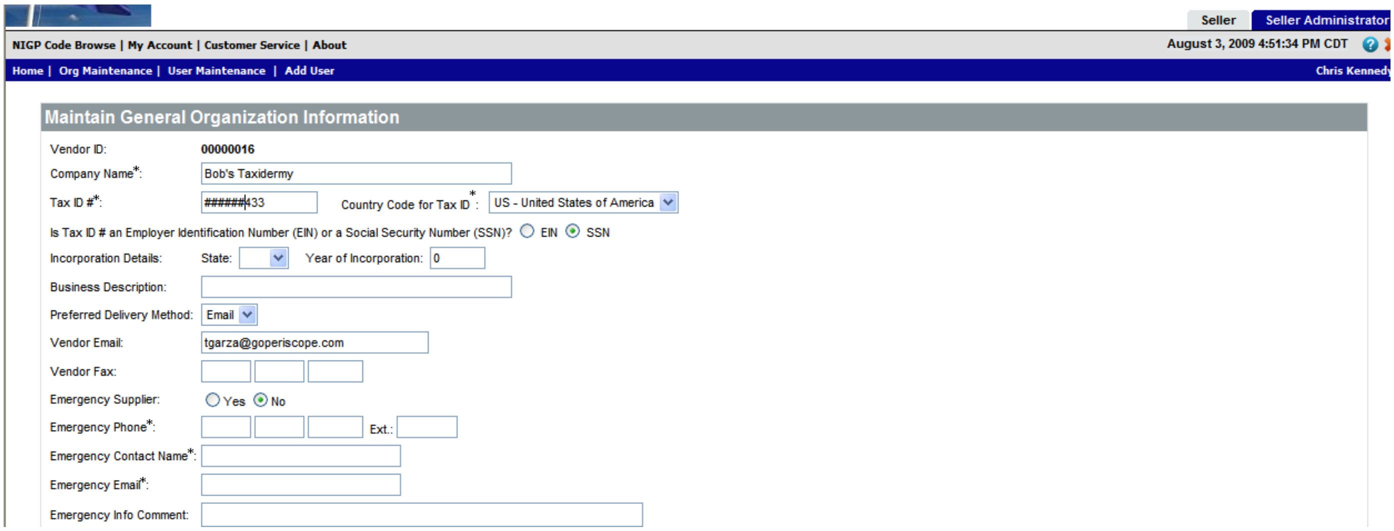
Upon logging into ePro with your unique Login ID and Password, you may update your company's vendor data if you have the role of **Seller Administrator**. To update your company's data, click on the **Seller Administrator** tab if it displays. NOTE: Users without the role of Seller Administrator can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

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

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:

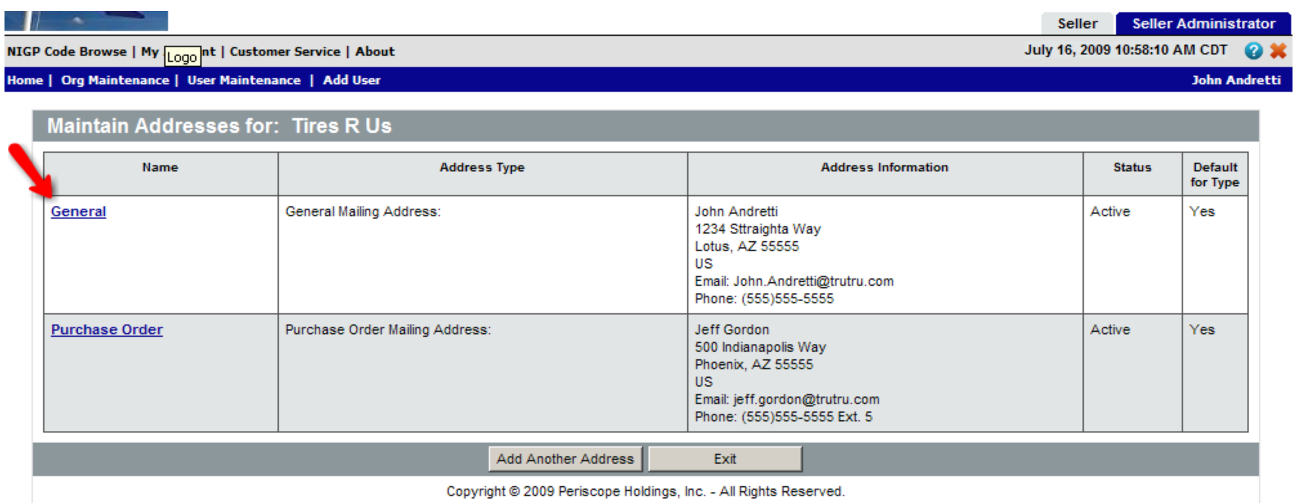
Updating Vendor General Information

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.

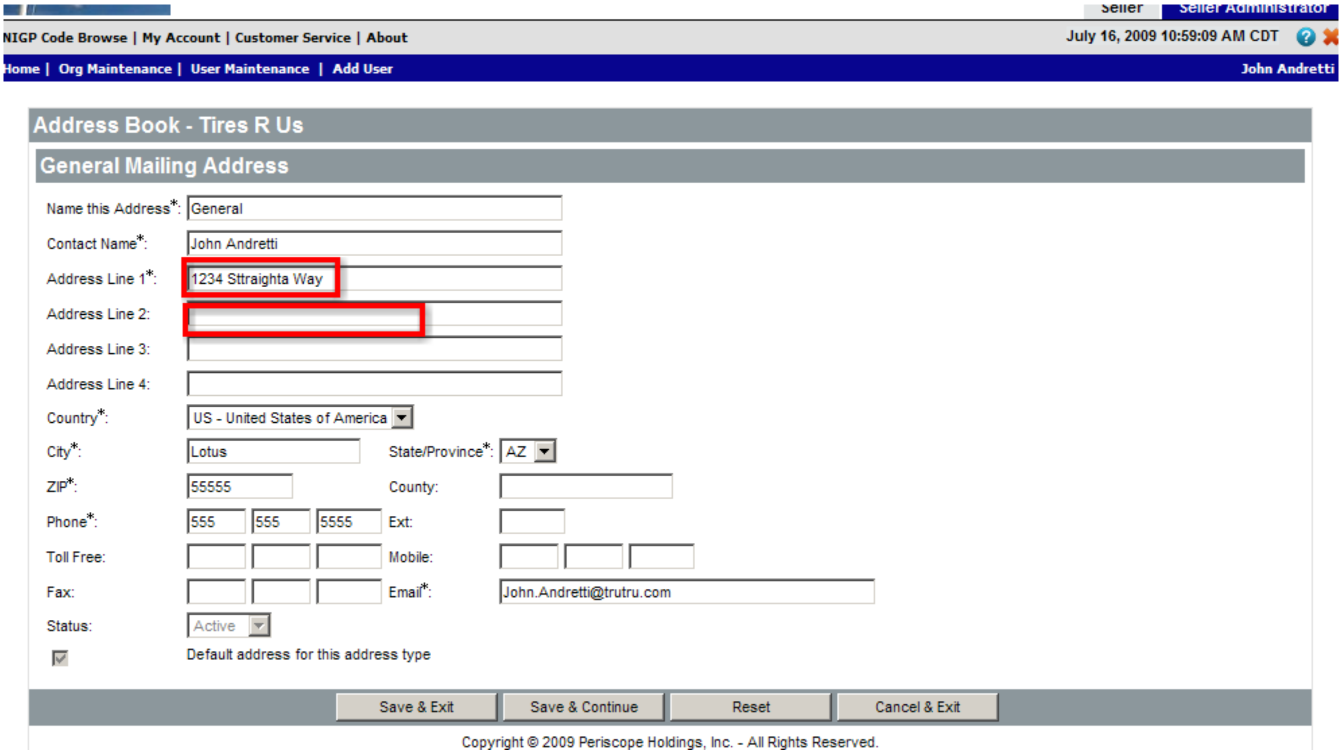


Updating Vendor Addresses

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.



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.

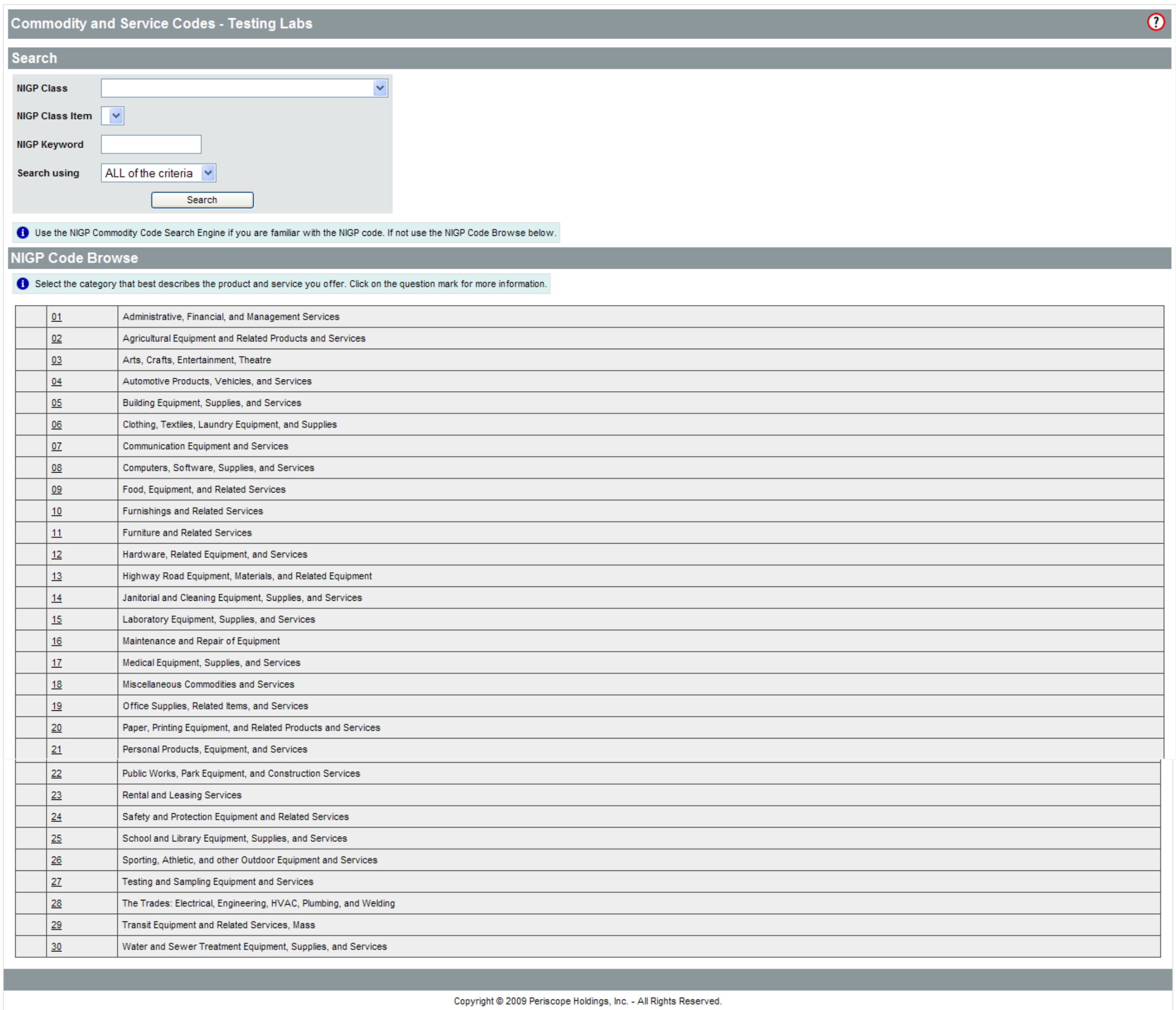


Updating Commodity Codes and Services

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**.


Commodity and Service Codes - Testing Labs

Search

NIGP Class

NIGP Class Item

NIGP Keyword

Search using ALL of the criteria

Search

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

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

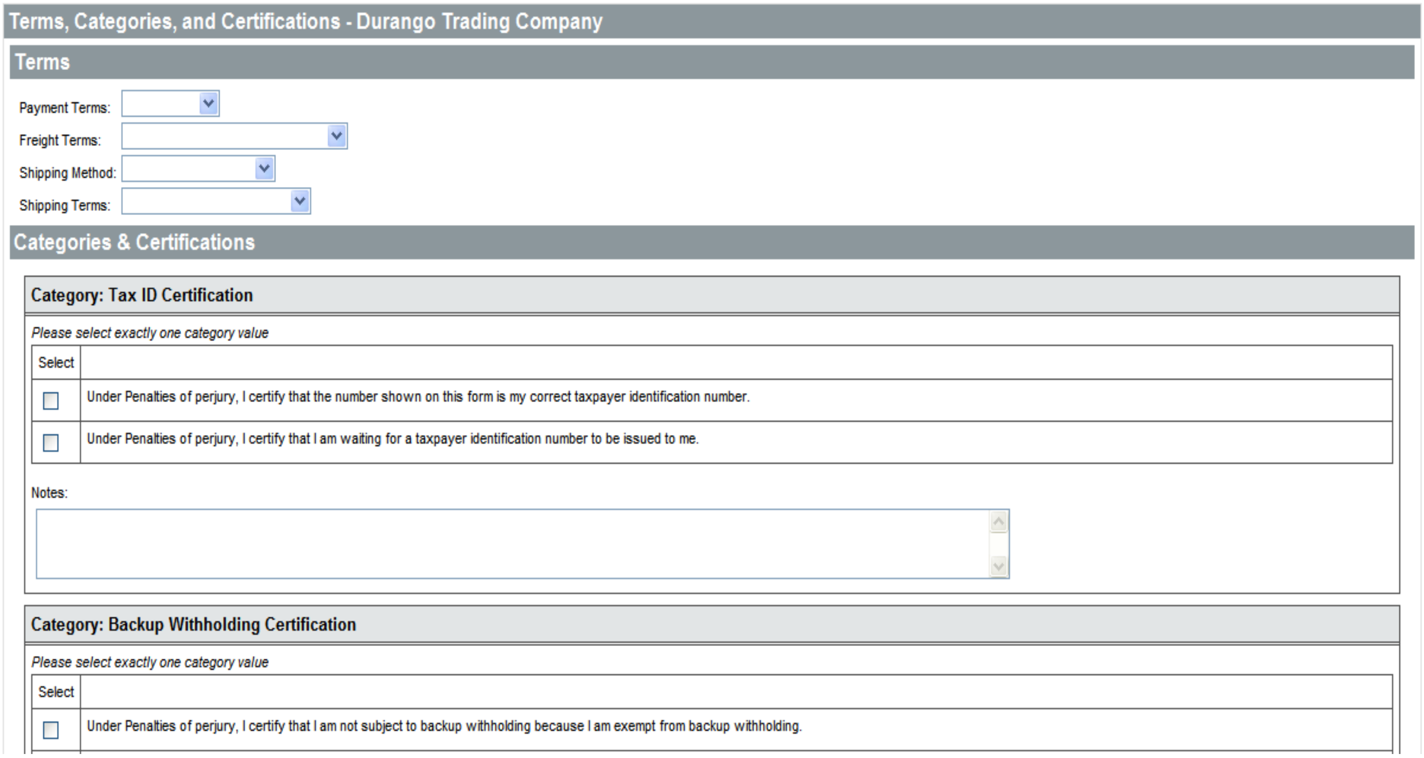
Updating Terms and Categories

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.



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	
☐	Under Penalties of perjury, I certify that the number shown on this form is my correct taxpayer identification number.
☐	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	
☐	Under Penalties of perjury, I certify that I am not subject to backup withholding because I am exempt from backup withholding.

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?

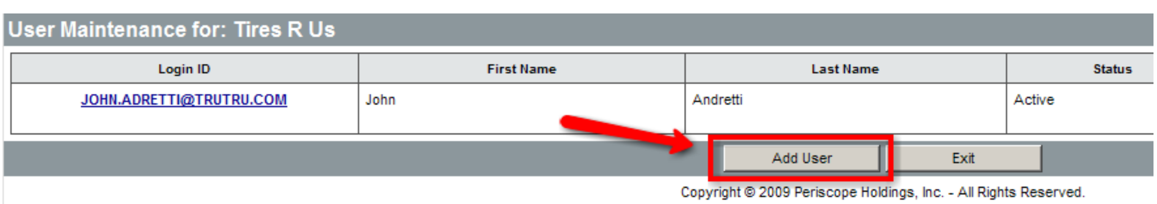
Upon logging into ePro with your unique Login ID and Password, you may update your company's vendor data if you have the role of **Seller Administrator**. To update your company's data, click on the **Seller Administrator** tab in the upper right hand corner. If the tab does not appear, you are already 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).



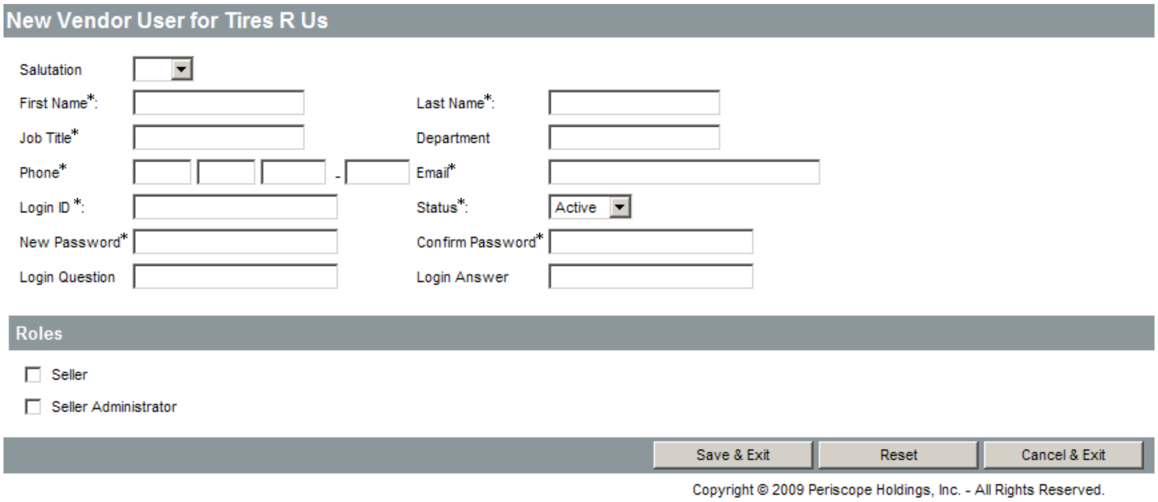
Note: A user's login must be unique in the system. An error screen may mean that the chosen Login ID is already in use.

Vendor Maintenance – Add a User

Quick Reference Guide

Enter New User Information

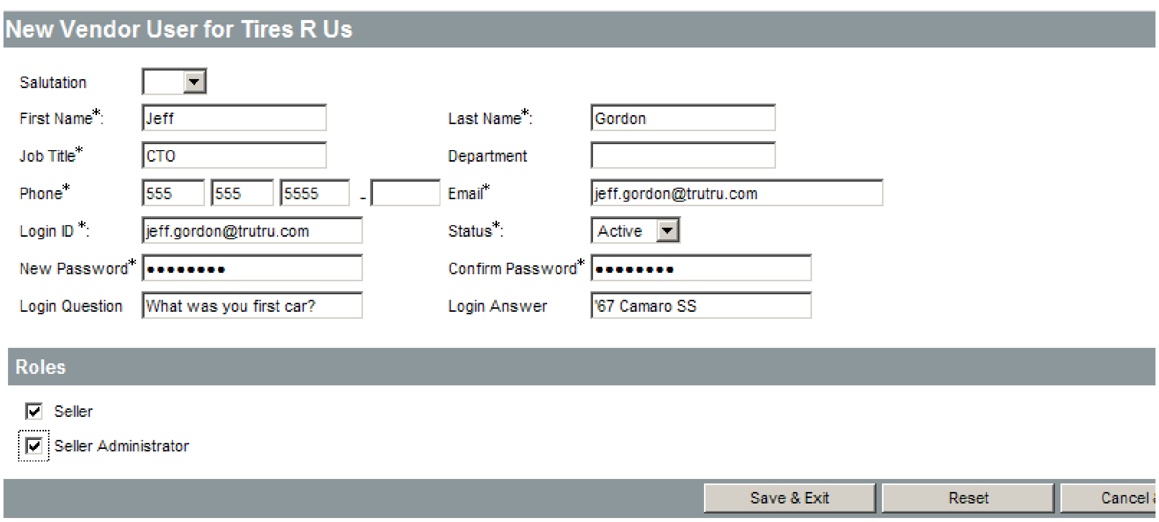
Complete the New Vendor User information, including all required fields (fields with an '*').



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.



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

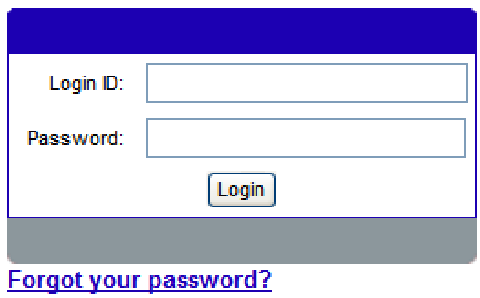
Adding Attachments to Vendor Profile

Quick Reference Guide

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.

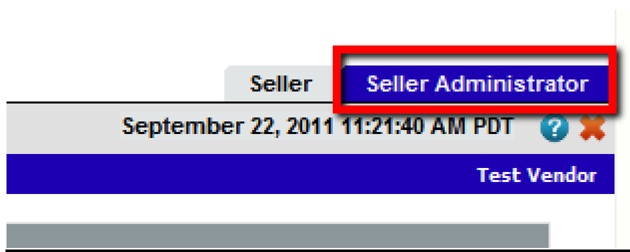
Login

Enter your user id and password into the login screen:



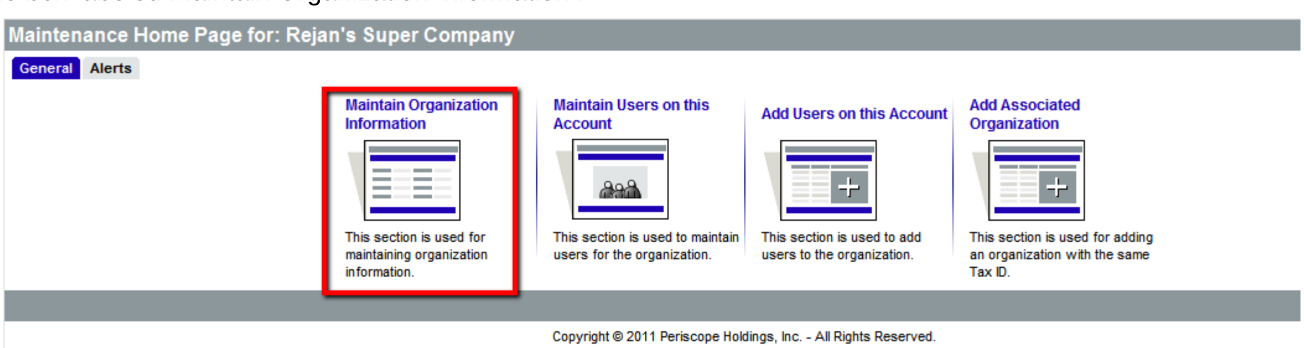
Select the Correct Profile

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

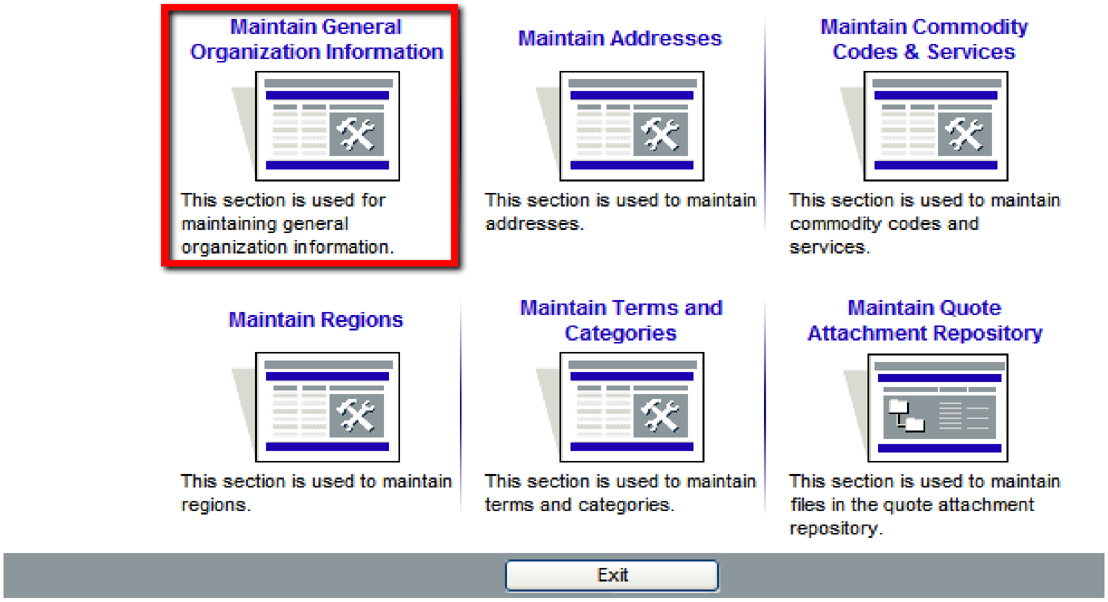


Navigate to the Upload Feature

Click the box labeled Maintain Organization Information :

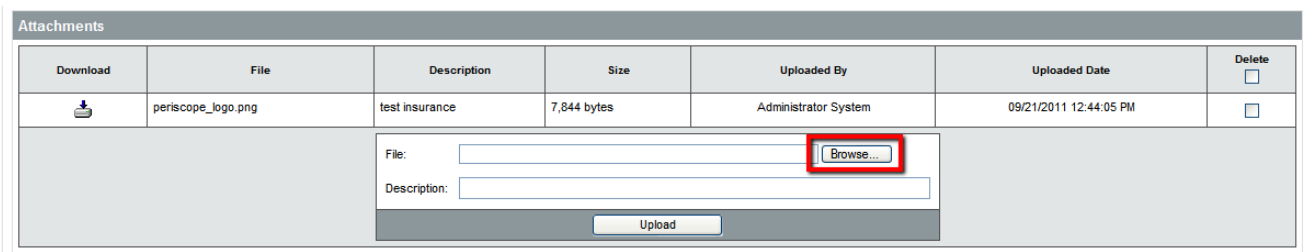


Click the box labeled Maintain General Organization Information:

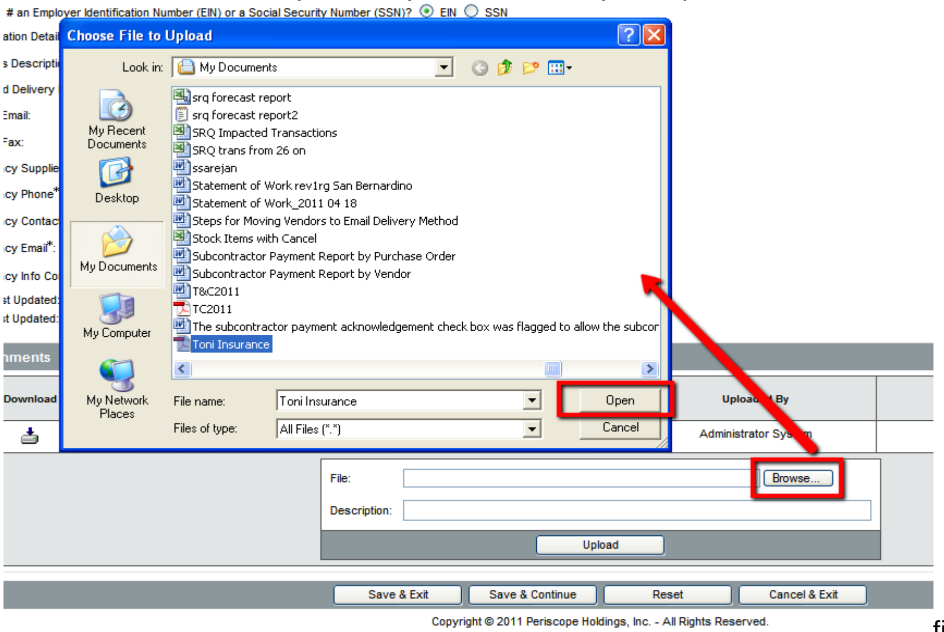


Select, Upload and Delete Files

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

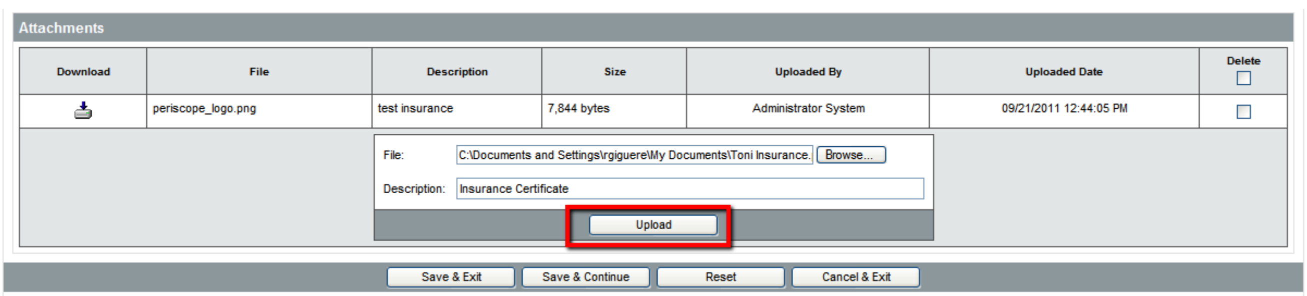


Select the correct file on your computer and click open to pull the

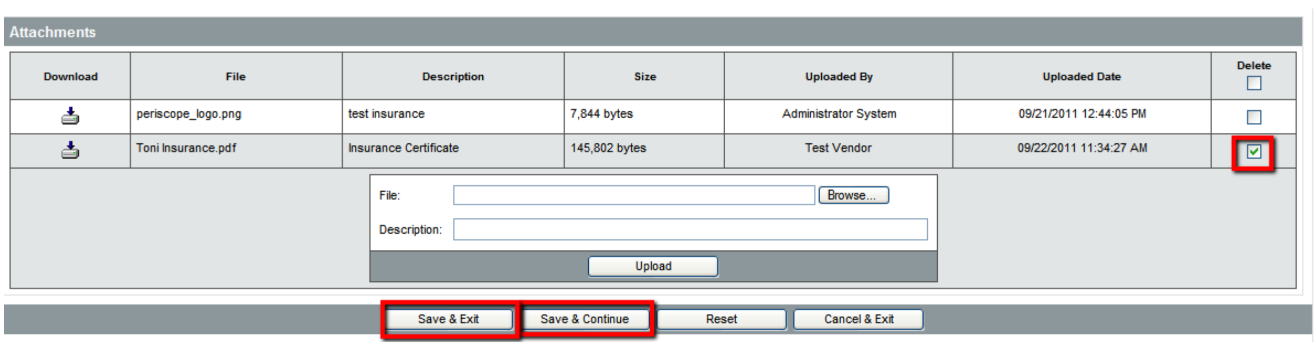


file back into ePro:

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:**



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**.

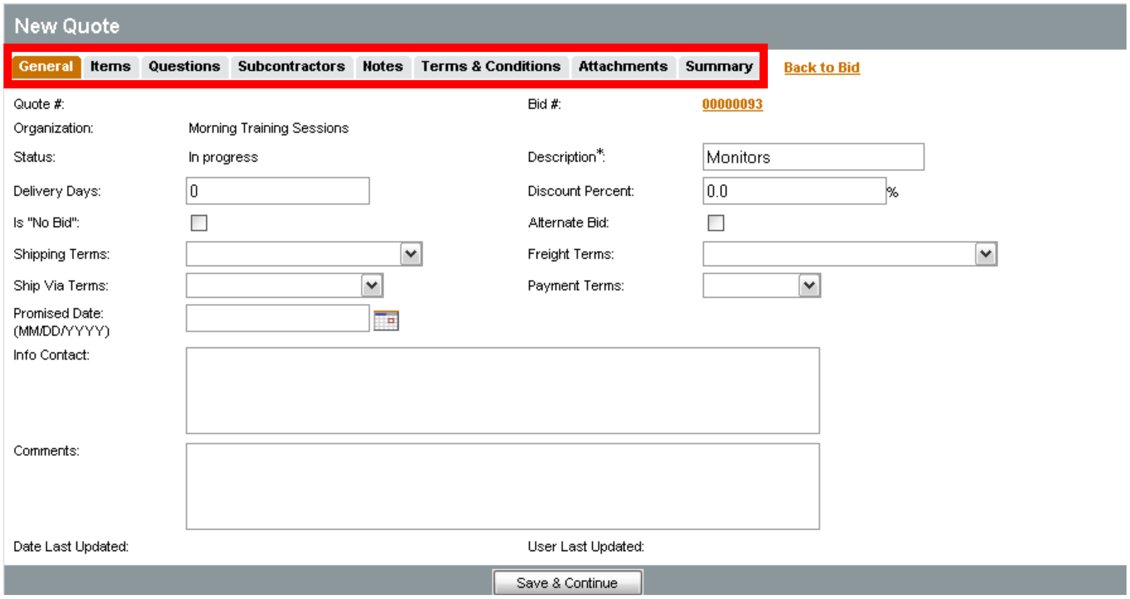
For vendors who are fully registered, log in with the User ID and Password.

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

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

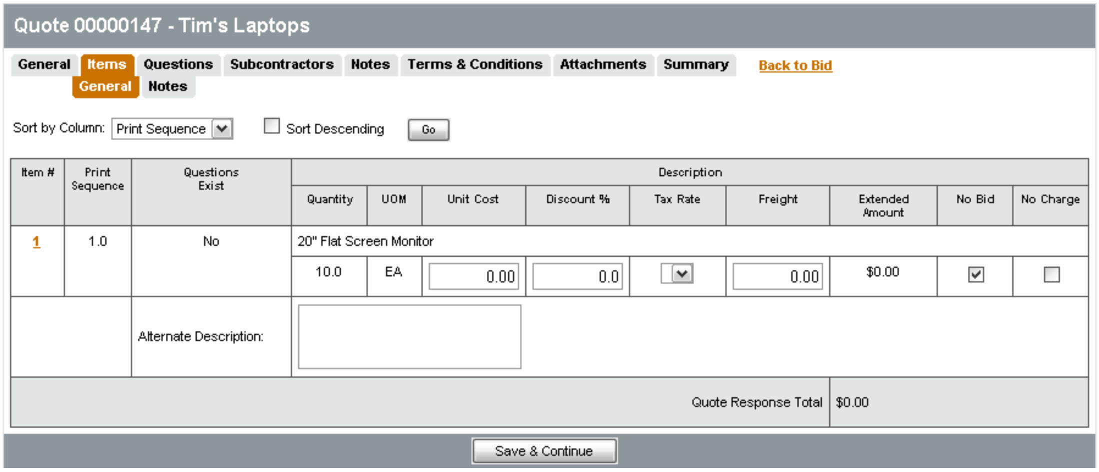
Once the vendor has entered in the necessary fields, click **Save and Continue**. The screen will refresh and a unique quote number will be assigned.

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.

Items Tab

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



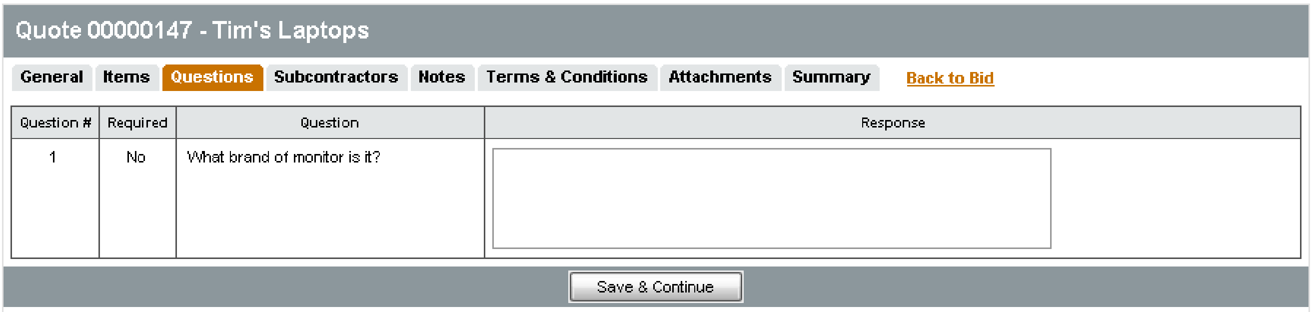
The following fields allow for the vendor to enter in information:

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**

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.



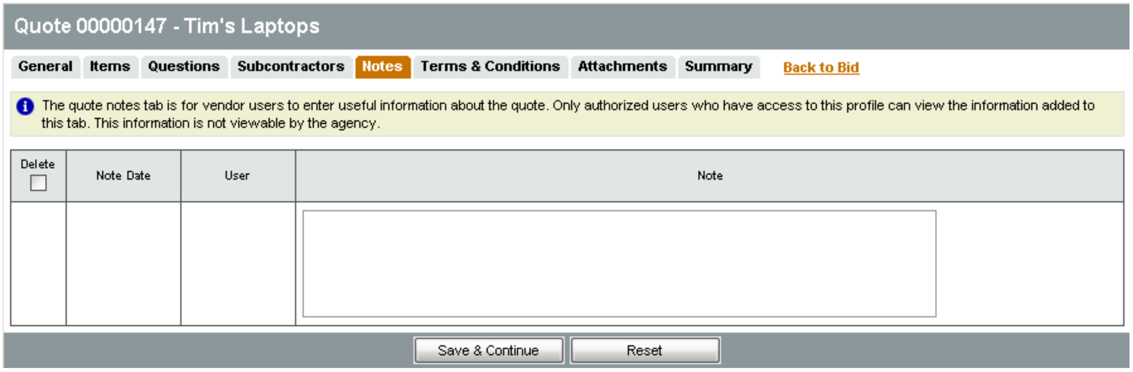
Subcontractor Tab

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.

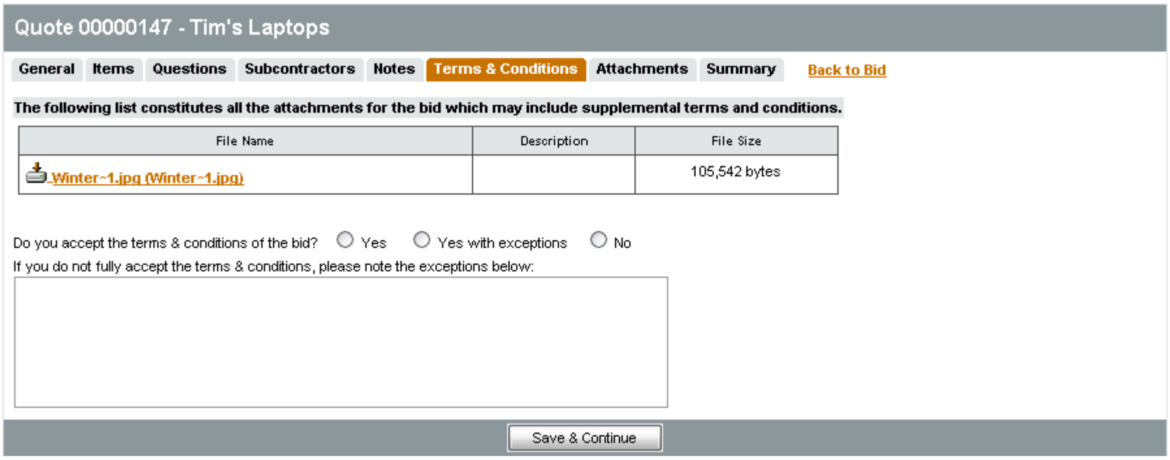
Notes Tab

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**.



Terms & Conditions Tab

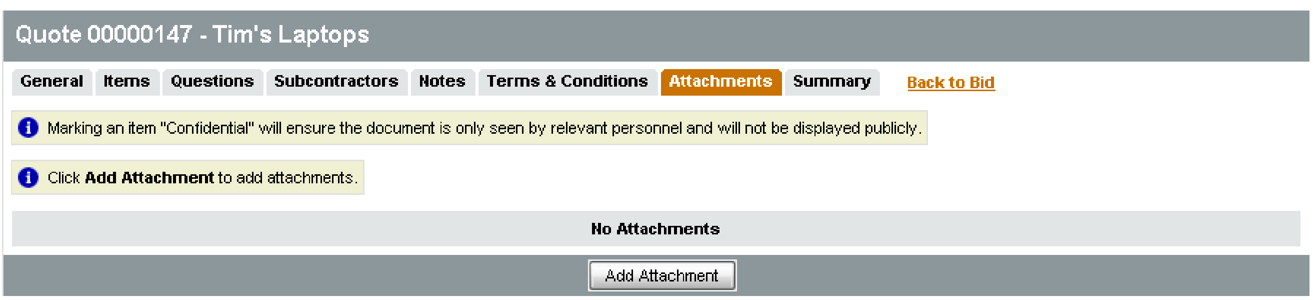
The Terms & Conditions tab allows the vendor to view or download any attachments to the solicitation. The attachments will include the official documentation related to the solicitation. The vendor is also asked whether or not they accept the terms and conditions of the solicitation.



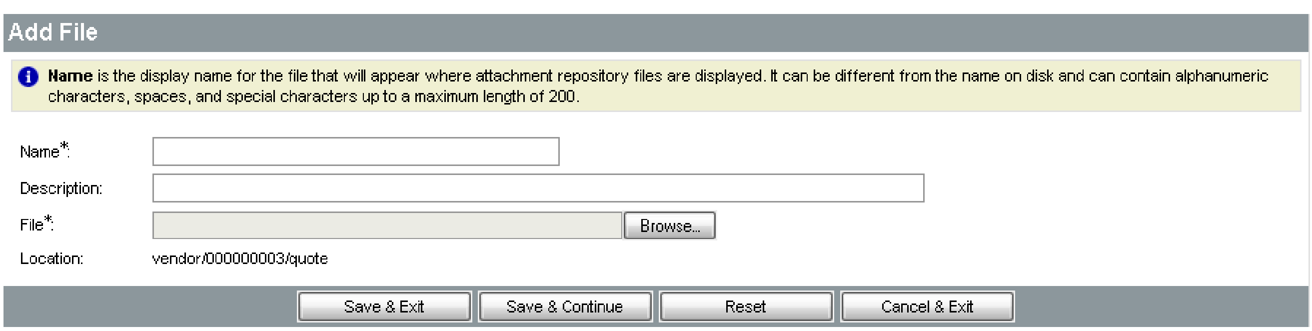
If the Terms and Conditions are accepted, select **Yes** and click **Save & Continue.** If the vendor selects **Yes with Exceptions** or **No,** the field below becomes required and the vendor must state the reasons for not accepting the Terms and Conditions**.**

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.

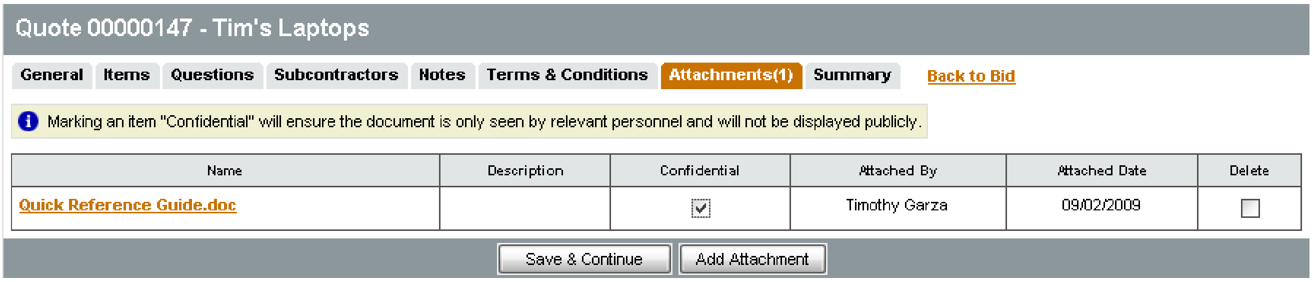


To add an attachment, click **Add Attachments**. The following screen will appear.



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.**



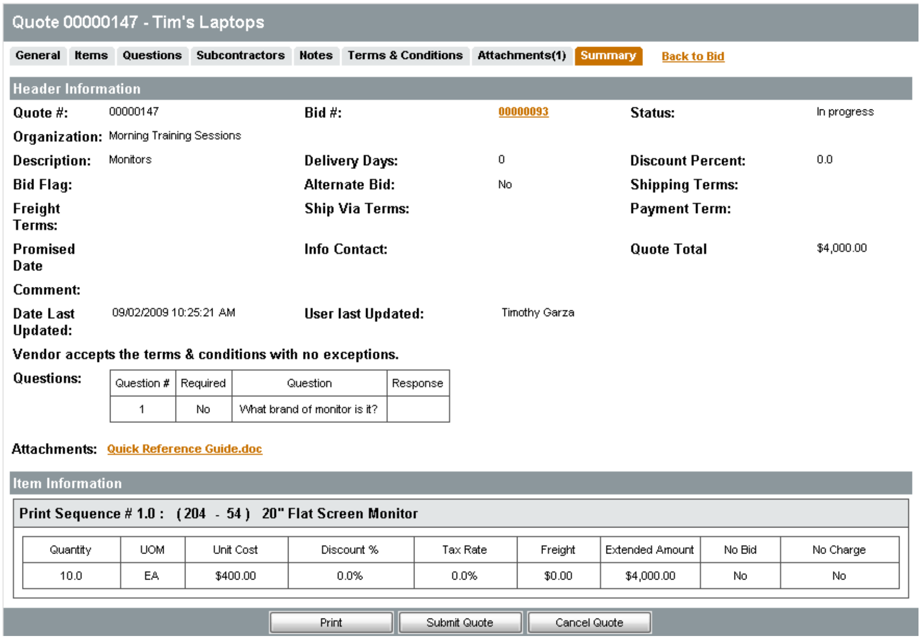
Summary Tab

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.

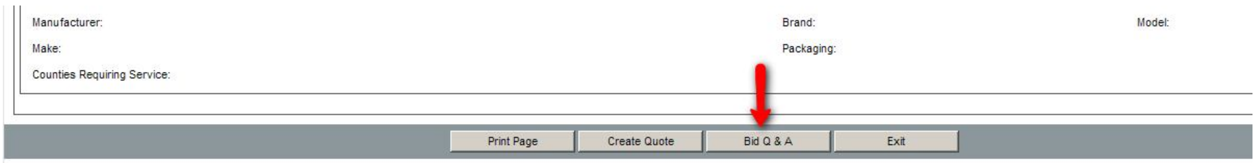
The **Submit Quote** button will submit the quote into the system. No changes can be made to the Quote unless the vendor withdraws the Quote.

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

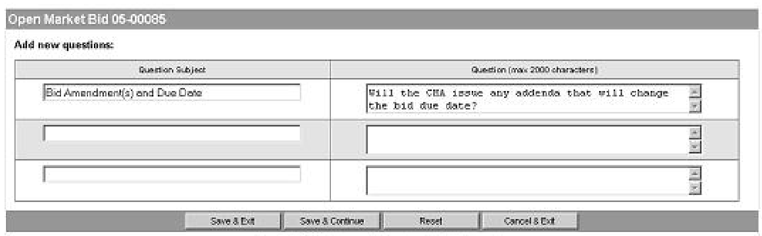


Viewing and Submitting a Question

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.



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.

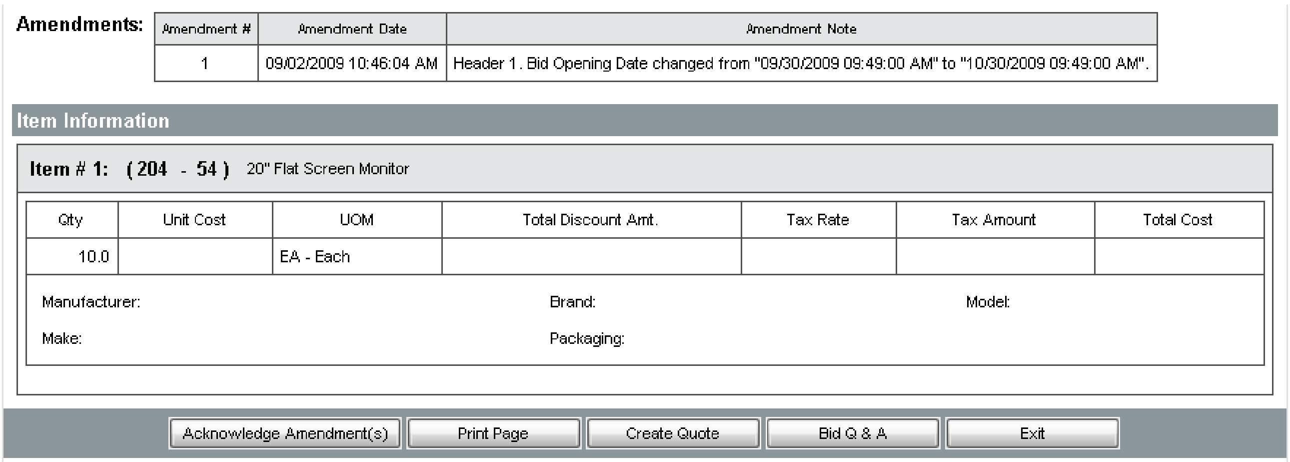
Amendments and Acknowledgements

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
00000068	Afternoon Training Sessions		Afternoon Trainee1	printing services	08/25/2009 01:30:00 PM	Scheduled	
00000069	Default Organization		Chris Harris	Laptops and related equipment	08/27/2009 09:15:00 AM		
00000070	Morning Training Sessions		Morning Trainee10	Police Bicycles	08/27/2009 09:15:00 AM	Scheduled	
00000072	Morning Training Sessions		Morning Trainee8	computer software	08/27/2009 09:15:00 AM	Scheduled	
00000073	Morning Training Sessions		Morning Trainee6	Residential Placement	08/27/2009 09:15:00 AM		
View More...							

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

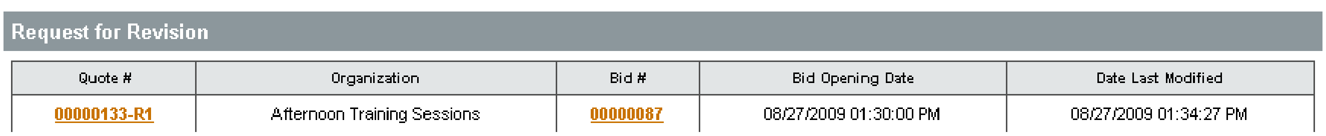
Qty	Unit Cost	UOM	Total Discount Amt.	Tax Rate	Tax Amount	Total Cost
10.0		EA - Each				

Manufacturer: Brand: Model:

Make: Packaging:

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.

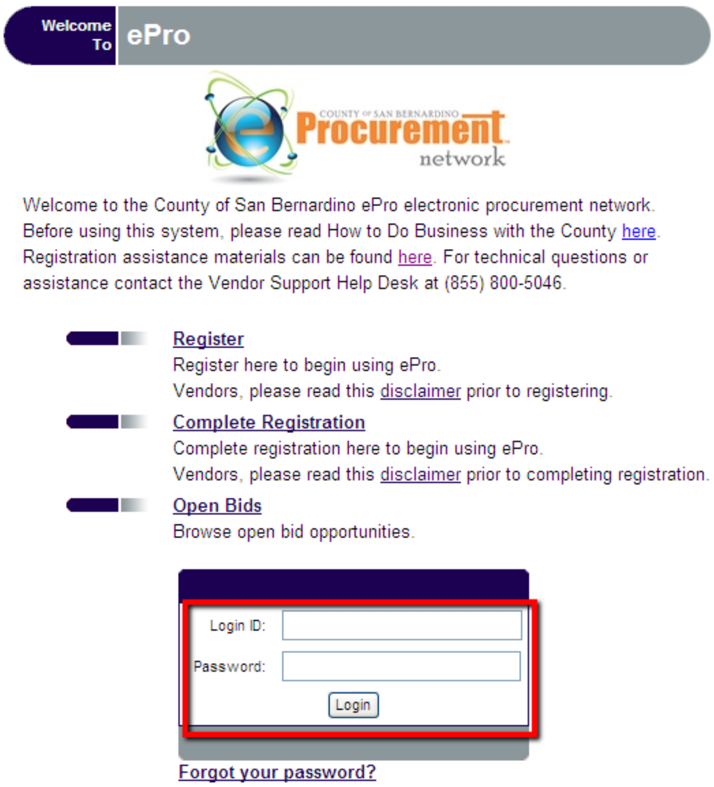
Accessing POs and Change Orders

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.

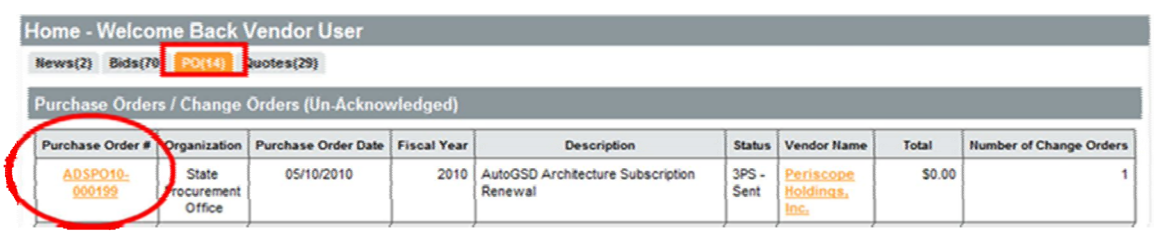
Login to ePro

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.



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.



Accessing POs and Change Orders

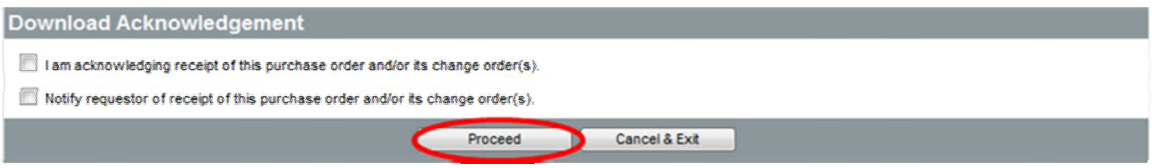
Quick Reference Guide

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

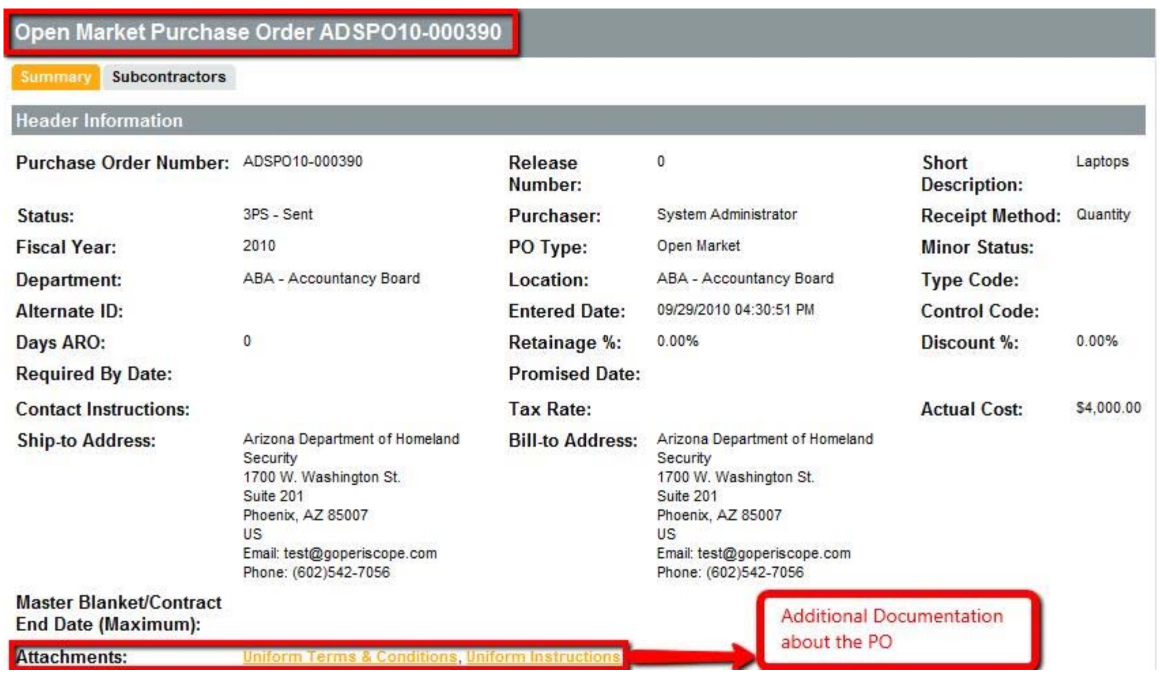
☐ I am acknowledging receipt of this purchase order and/or its change order(s).

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

Proceed | Cancel & Exit

Viewing a Purchase Order

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



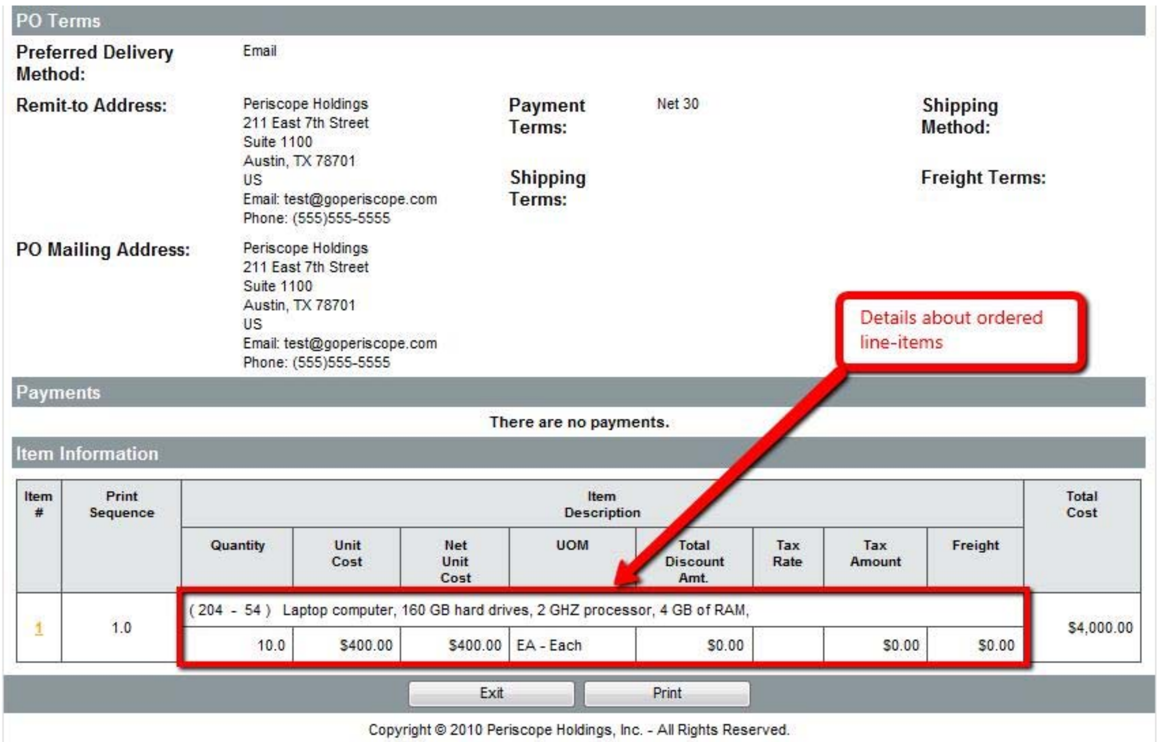
Open Market Purchase Order ADSPO10-000390

Summary | Subcontractors

Header Information

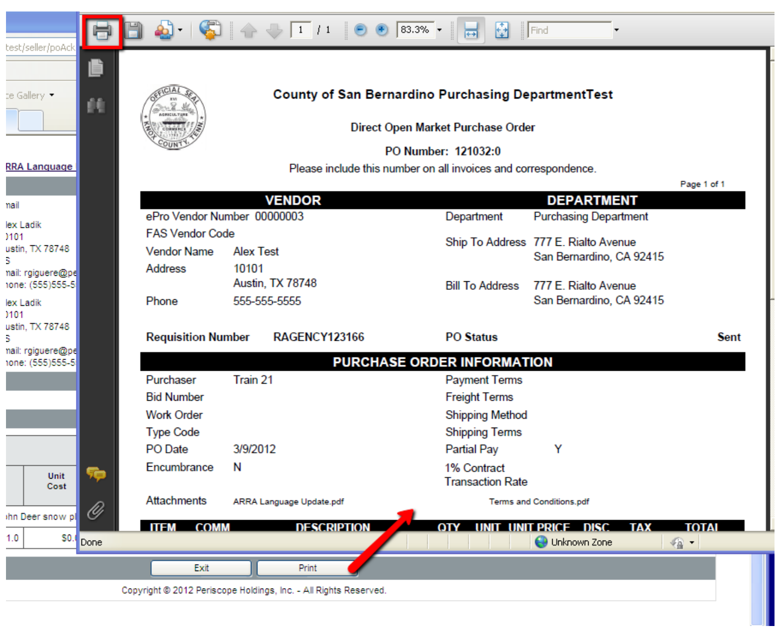
Purchase Order Number:	ADSPO10-000390	Release Number:	0	Short Description:	Laptops
Status:	3PS - Sent	Purchaser:	System Administrator	Receipt Method:	Quantity
Fiscal Year:	2010	PO Type:	Open Market	Minor Status:	
Department:	ABA - Accountancy Board	Location:	ABA - Accountancy Board	Type Code:	
Alternate 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:			
Contact Instructions:		Tax Rate:		Actual Cost:	$4,000.00
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



Printing a Purchase Order

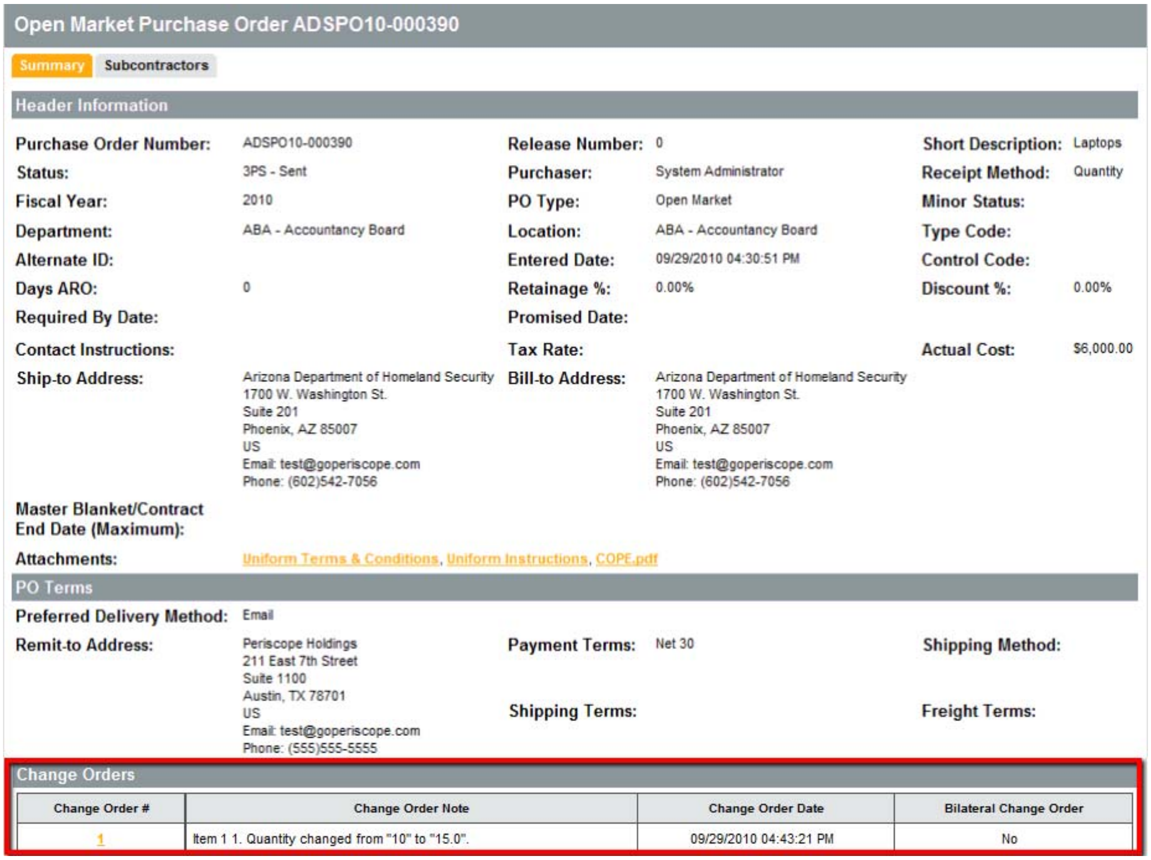
All POs issued to you will stay within ePro indefinitely, so you do not need to print it out. However, if you would like to print out a paper copy of a PO, click on the **Print** button on the bottom of the screen while looking at the PO. ePro will preview the PO on the screen and you can then print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



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 ADSPO10-000390

Summary | Subcontractors

Header Information

Purchase Order Number:	ADSPO10-000390	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:			
Contact Instructions:		Tax Rate:		Actual Cost:	$6,000.00
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:	

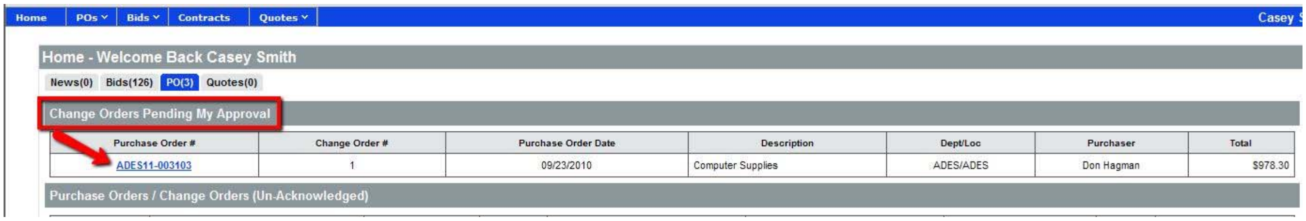
Change Orders

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.

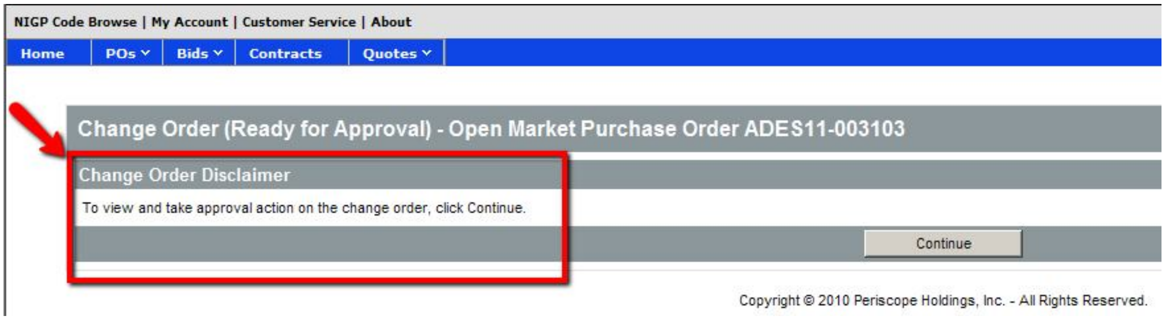
After you’ve received this notification, the Change Order is visible from your homepage within ePro under the PO tab within the **Change Orders Pending My Approval** section.



Approving Bilateral Change Orders

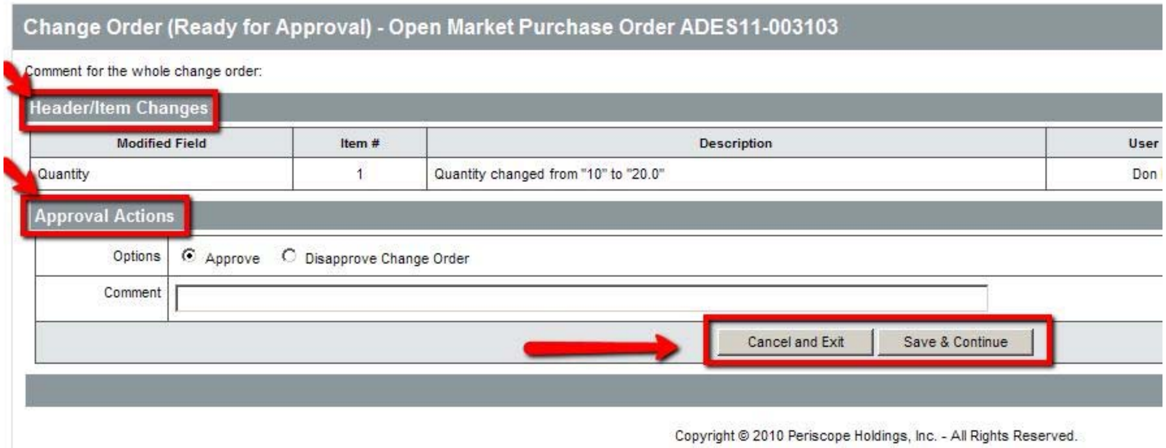
If you have been notified of a Change Order that you need to approve, upon selecting the document, follow the steps below to take action:

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



2. Review the Change Order onscreen.

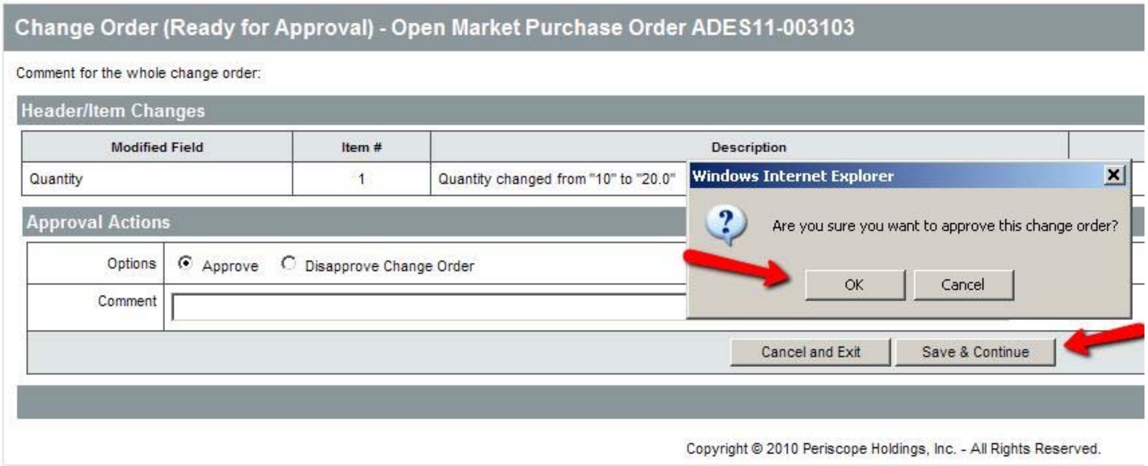
NOTE: If you want to review the entire PO, click the *Cancel and Exit* button. This will return you to your homepage. Select the PO tab again, then click on the PO# from the *Purchase Orders - Sent* section.



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.

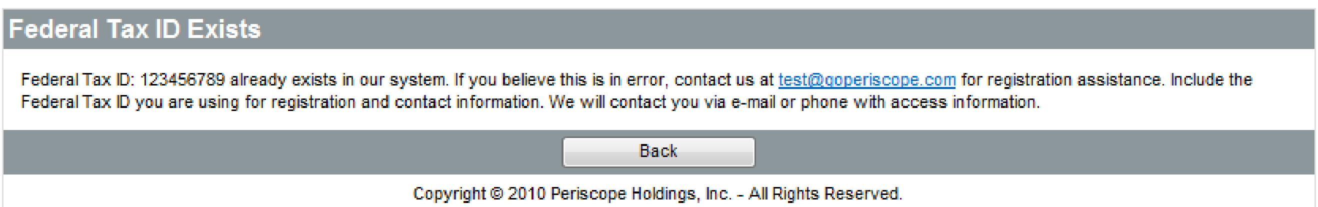


Each vendor that registers with ePro must have a unique tax identification number. However, if your entity does business under multiple names, or has subsidiaries that utilize the same tax ID, you may want to register each of these DBAs or subsidiaries separately so that each can receive and manage solicitation 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@goperiscope.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.

Back

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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

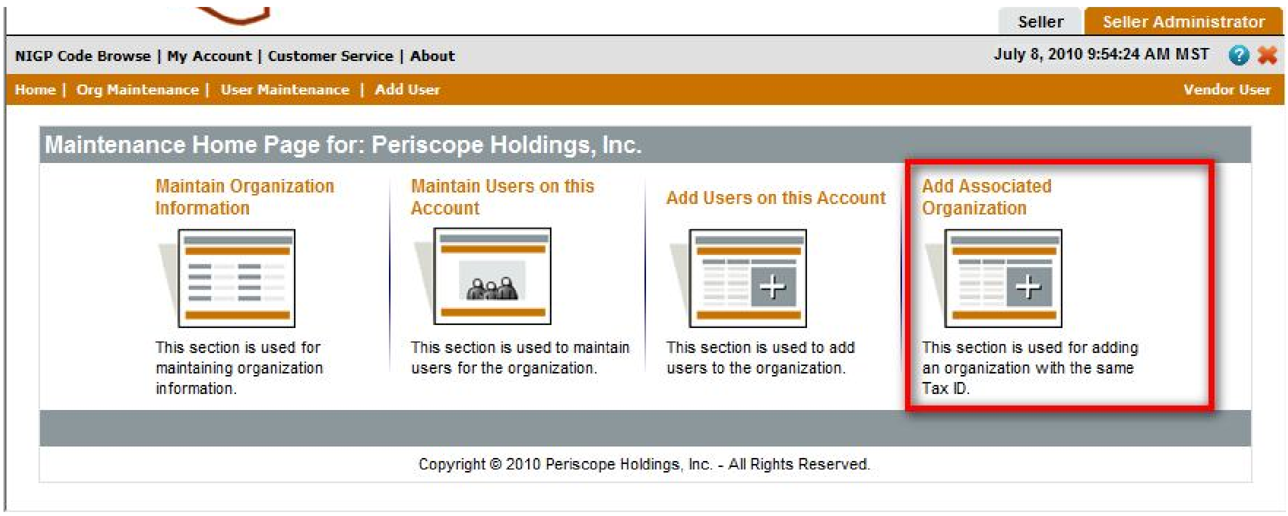
ePro will allow you to register a new vendor with the same tax ID as a previously setup vendor if you access ePro using a link sent to you by that previously set up vendor.

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

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.



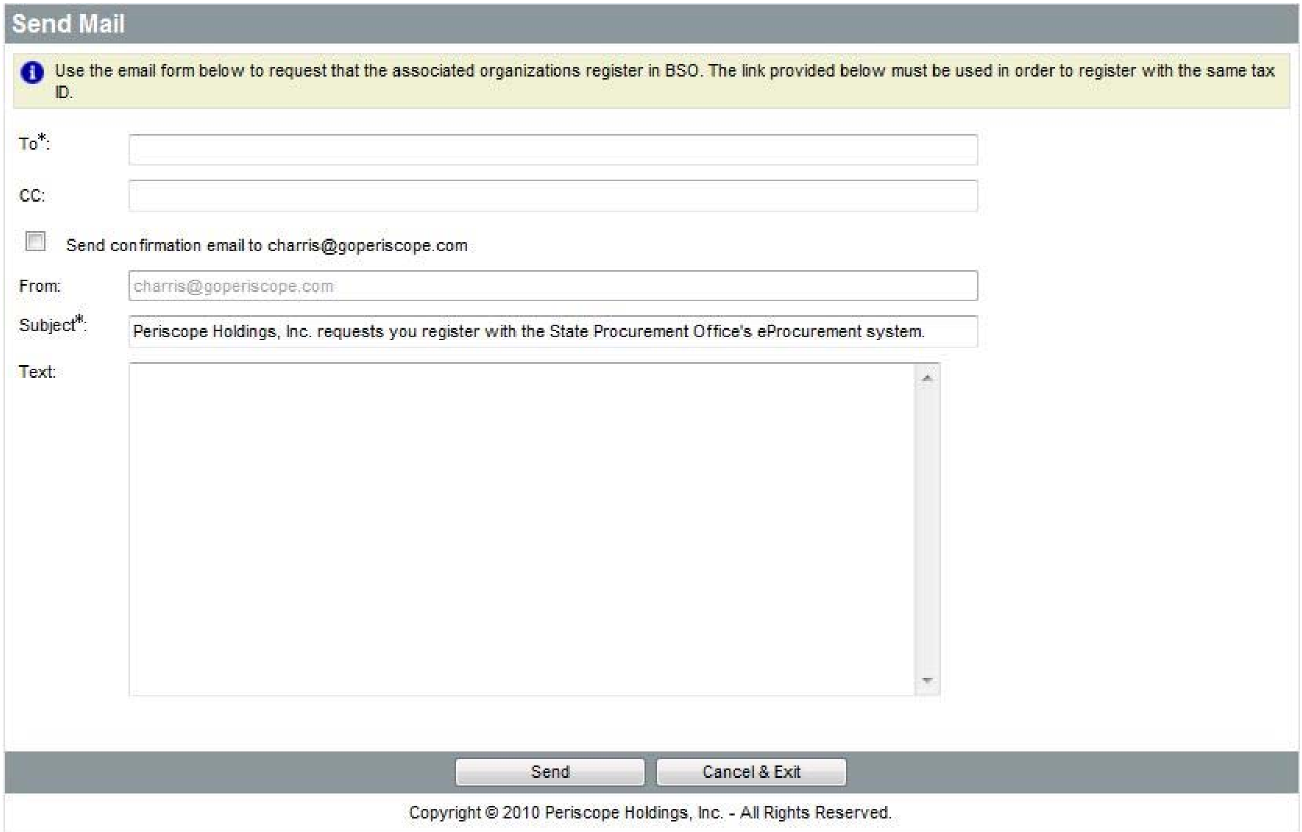
Upon selecting **Add Associated Organization**, the **Send Mail** screen will appear. Completing the following fields on this screen and selecting the **Send** button on the bottom of the screen will send the email and the link to the desired recipients.

- 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

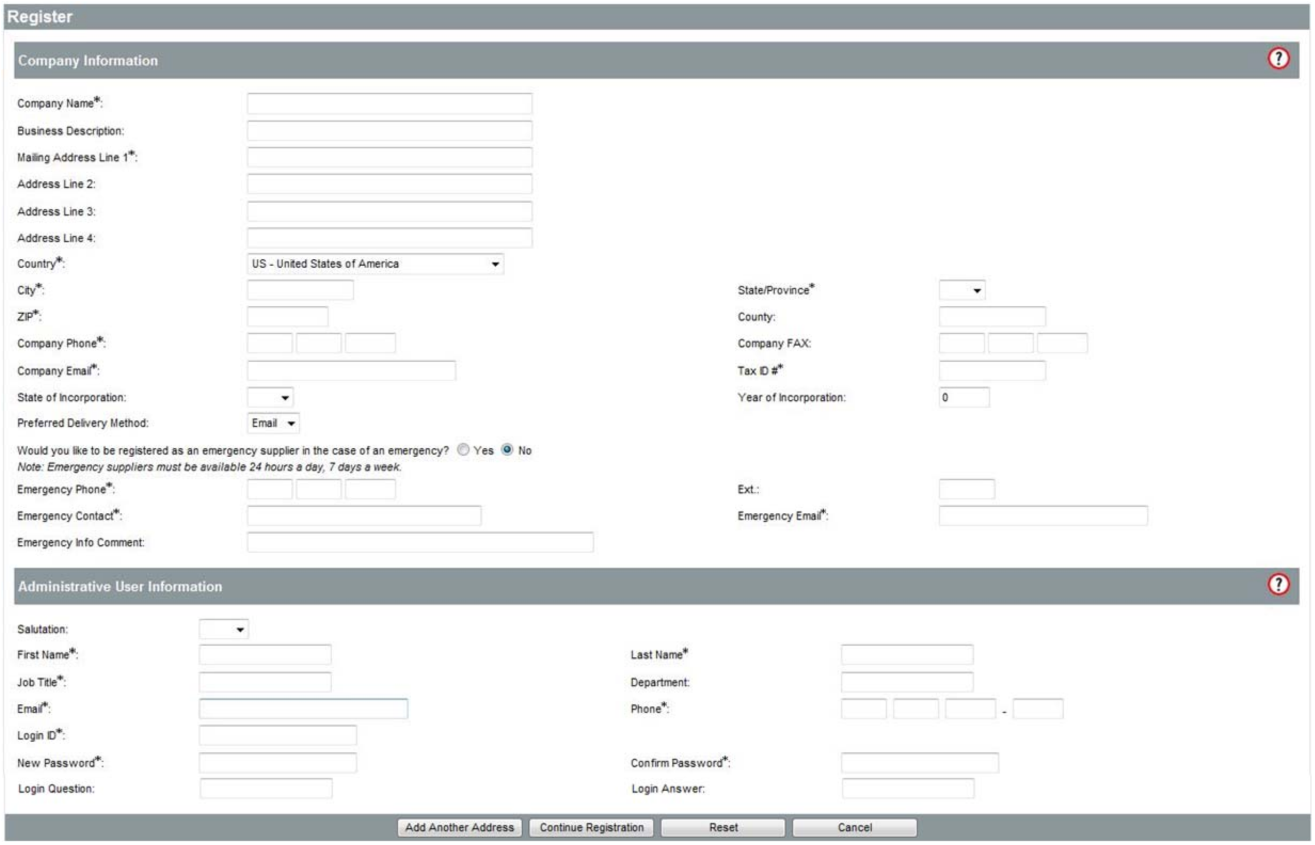
- Text – The body of the email that will be sent. This automatically populates with the following language, which cannot be changed, but text typed into this field will appear *before* the standard language below.

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



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

Company Name*:
Business Description:
Mailing Address Line 1*:
Address Line 2:
Address Line 3:
Address Line 4:
Country*: US - United States of America
City*: State/Province*
ZIP*: County:
Company Phone*: Company FAX:
Company Email*: Tax ID #*
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:

Administrative User Information

Salutation:
First Name*: Last Name*
Job Title*: Department:
Email*: Phone*:
Login ID*:
New Password*: Confirm Password*:
Login Question: Login Answer:

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.

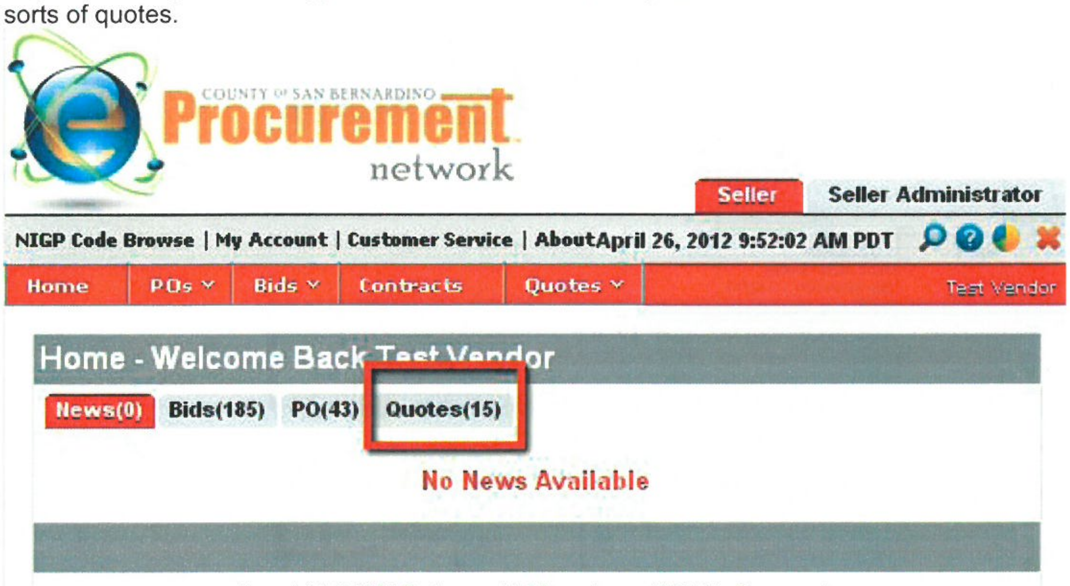
Help Desk: (855) 800-5046

Informal Quote Response
Quick Reference Guide

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

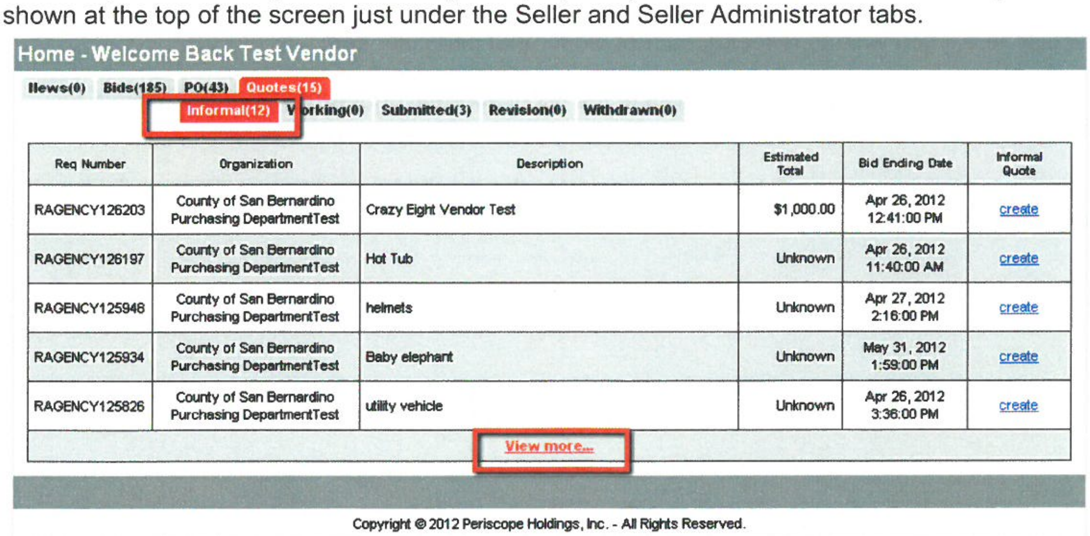
You may receive an email inviting you to provide an informal quote, or you may view the list of all available informal quote requests once you have logged into ePro and clicked on your Seller role. Click on the Quotes tab to access all the different sorts of quotes.



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.



Home - Welcome Back Test Vendor

News(0) Bids(185) PO(43) Quotes(15)

Informal(12) Working(0) Submitted(3) Revision(0) Withdrawn(0)

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
RAGENCY125948	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

View more...

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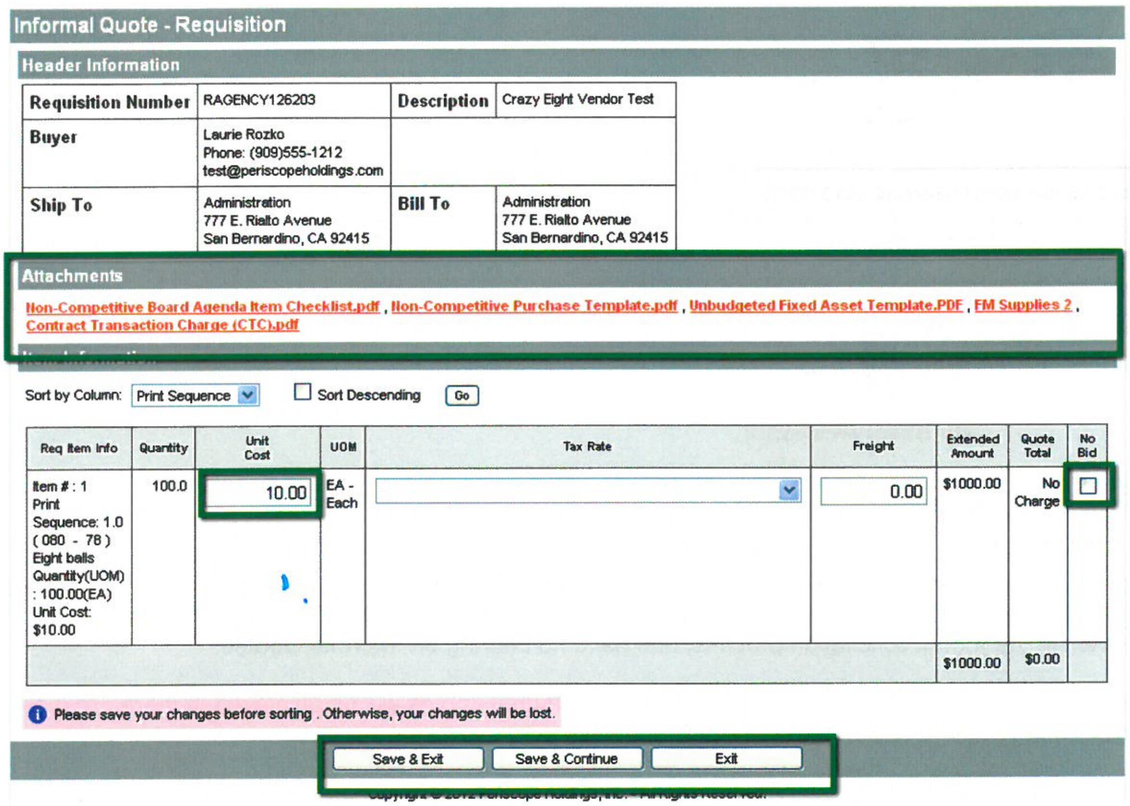
Informal Quote Response
Quick Reference Guide

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.



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.