

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:

Login

[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(78) **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
ADSP010-000129	State Procurement Office	05/10/2010	2010	AutoGSD Architecture Subscription Renewal	3PS - Sent	Periscope Holdings, Inc.	\$0.00	1

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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 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:			
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

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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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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/poAch

County of San Bernardino Purchasing DepartmentTest

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	Bill To Address	777 E. Rialto Avenue San Bernardino, CA 92415
Address	10101 Austin, TX 78748		
Phone	555-555-5555		

Requisition Number RAGENCY123166 PO Status Sent

PURCHASE ORDER INFORMATION	
Purchaser	Train 21
Bid Number	
Work Order	
Type Code	
PO Date	3/9/2012
Encumbrance	N
Payment Terms	
Freight Terms	
Shipping Method	
Shipping Terms	
Partial Pay	Y
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					\$0.00			

Exit Print

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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
Status:	3PS - Sent	Purchaser:	System Administrator
Fiscal Year:	2010	PO Type:	Open Market
Department:	ABA - Accountancy Board	Location:	ABA - Accountancy Board
Alternate ID:		Entered Date:	09/29/2010 04:30:51 PM
Days ARO:	0	Retainage %:	0.00%
Required By Date:		Promised Date:	
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):		Actual Cost: \$6,000.00	
Attachments: Uniform Terms & Conditions , Uniform Instructions , COPE.pdf			
PO Terms			
Preferred Delivery Method:	Email	Payment Terms:	Net 30
Remit-to Address:	Periscope Holdings 211 East 7th Street Suite 1100 Austin, TX 78701 US Email: test@goperiscope.com Phone: (555)555-5555	Shipping Terms:	
		Shipping Method:	
		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.



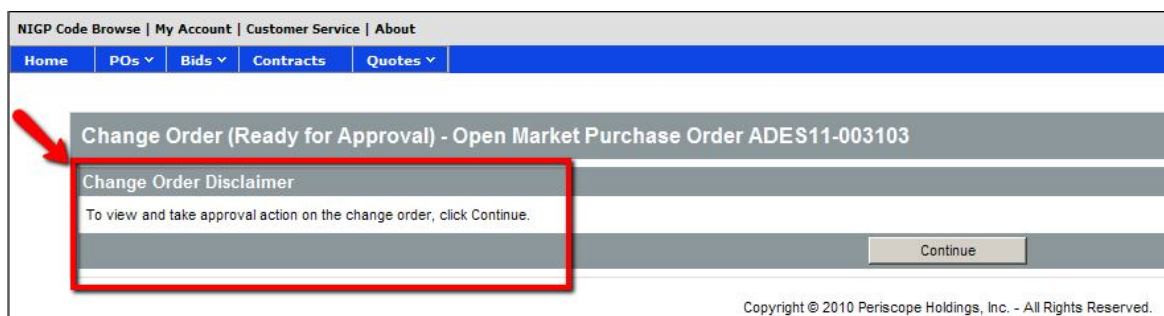
Purchase Order #	Change Order #	Purchase Order Date	Description	Dept/Loc	Purchaser	Total
ADES11-003103	1	09/23/2010	Computer Supplies	ADES/ADES	Don Hagman	\$978.30

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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- 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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- 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.

- 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
Quantity	1	Quantity changed from "10" to "20.0"

Approval Actions

Options: ☒ Approve ☐ Disapprove Change Order

Comment:

Cancel and Exit **Save & Continue**

Windows Internet Explorer

Are you sure you want to approve this change order?

OK **Cancel**

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