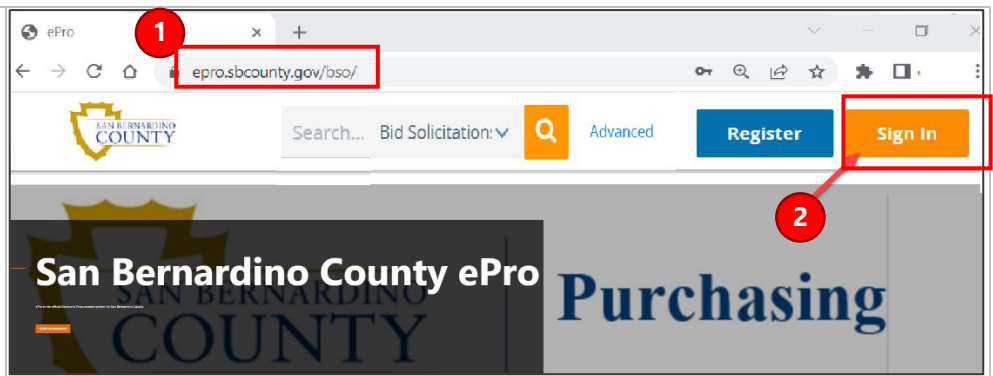
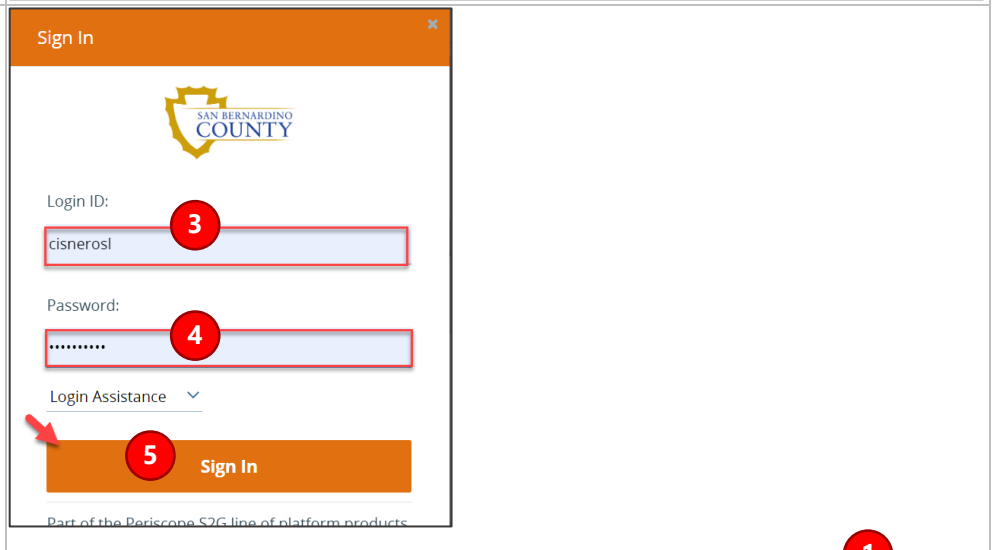
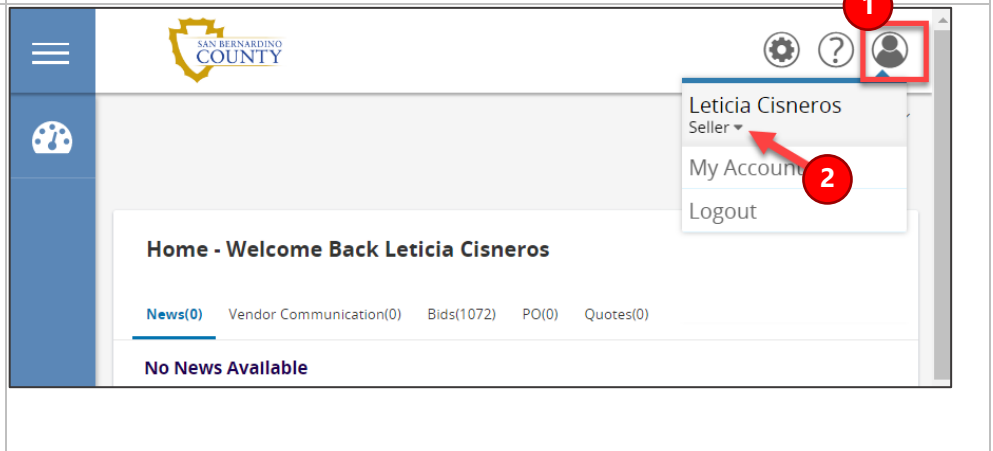


Manage Your ePro Vendor Instruction Guide Account

This guide provides instructions on how to manage your San Bernardino County ePro Vendor Account. You can manage your vendor account to update your organization’s information, add users and request password reset for your users.

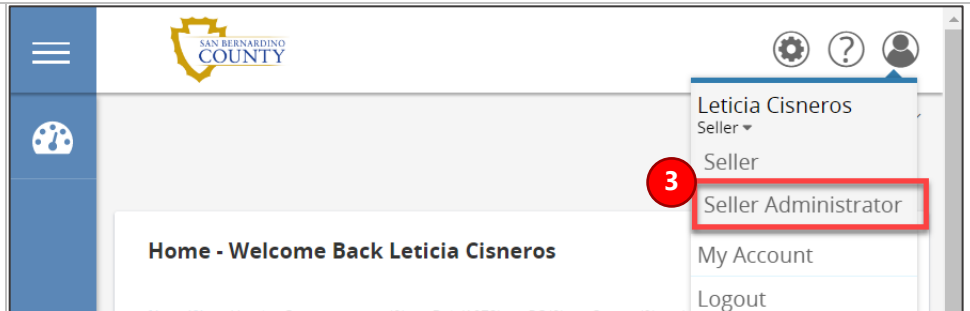
Note: If you have not registered for an ePro account, see instruction guide on How to Register in ePro for San Bernardino County.

| | |
|---|--|
| <ol style="list-style-type: none"> Go to the internet address: https://epro.sbcounty.gov/ Click Sign In. |  |
| <ol style="list-style-type: none"> Enter your Login ID. Enter your Password. Click Sign In. <p>Note: If you forgot your password, click Login Assistance.</p> |  |
| <p>After logging in to your ePro vendor account, you will need to switch to the administrator profile. The Seller Administrator profile is only used to manage the vendor account. Bids cannot be searched for or viewed under the Seller Administrator profile.</p> <ol style="list-style-type: none"> Click the Account icon. Click the profile drop-down. |  |

3. Click **Seller Administration**.

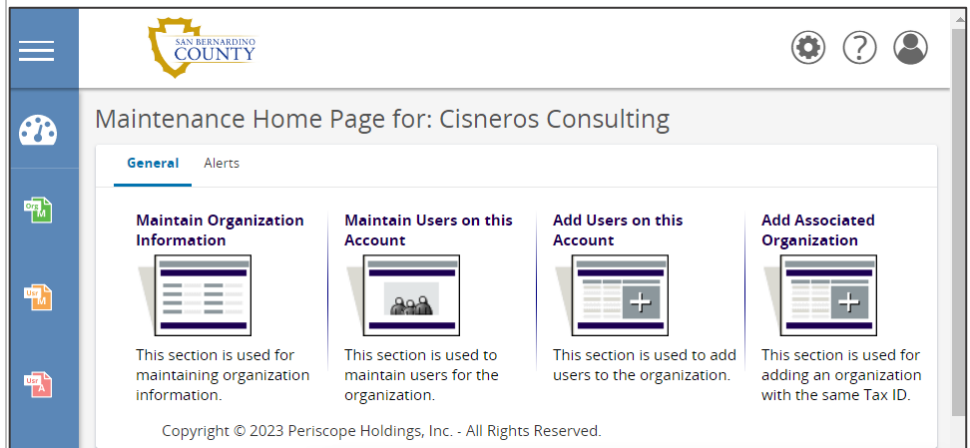
Important: The next time you login to ePro, be sure to change your profile to **Seller** so that you can view bids.

The Maintenance Home Page will display.



The Maintenance Home Page allows you to:

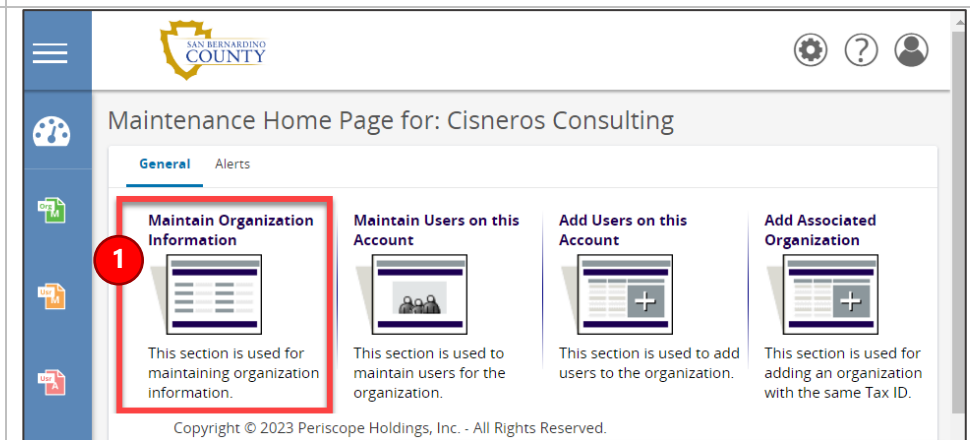
- Update your organization by clicking on the Maintain Organization Information tile.
- Maintain Users on this account allows you to update user information and request password reset.
- Add Users on this Account allows you to add users.
- Add Associated Organization is not supported.



To update information for your organization:

1. Click the **Maintain Organization Information** tile.

The Maintain Organization Information page displays.

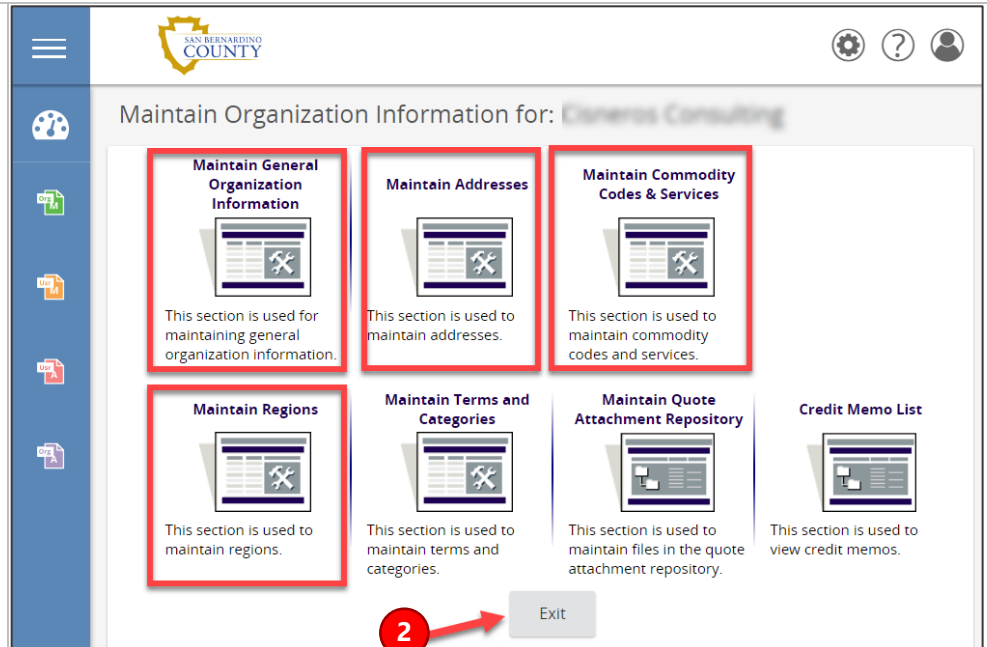


Updating Organization Information

From the Maintain Organization Information page, you can update information in the following tiles:

- Maintain General Organization Information allows you to update your mailing address, and company and vendor legal name.
- Maintain Addressees allows you to add/update additional addresses.
- Maintain Commodity Codes & Services allow you to add/delete commodity codes that reflect the products and services for your business.
- Maintain Regions allows you to add/update the San Bernardino regions that your business services.

2. Click **Exit** to return to the Maintenance Home Page.



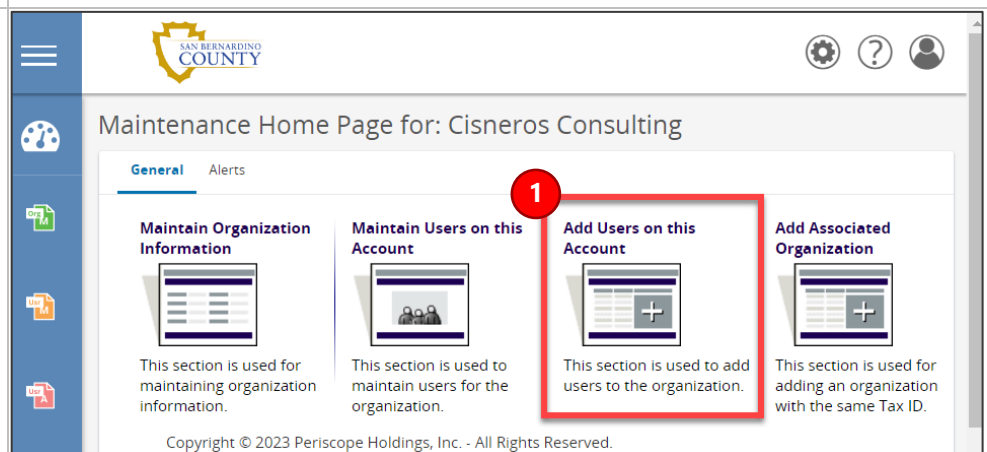
Adding users to Vendor Account

The following information will be required to create a new user:

- First Name
- Last Name
- Job Title
- Phone
- Email
- Login ID
- Login Answer

1. Click **Add Users on this Account** tile.

The New Vendor User page displays.



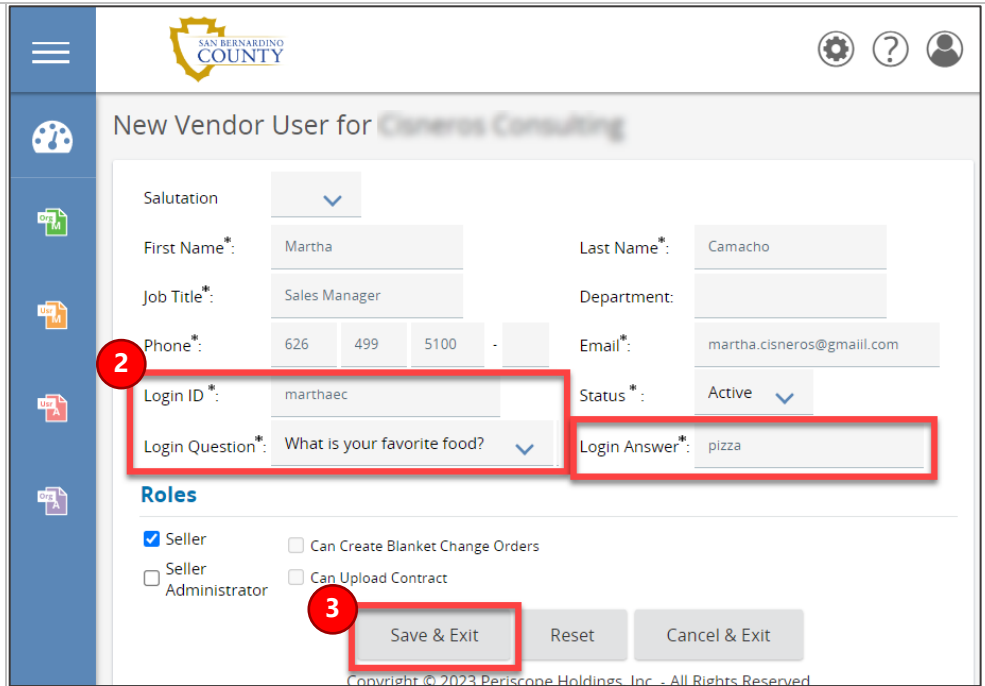
In the New Vendor User page, complete the mandatory fields identified with an asterisk to the right of the field name.

Mandatory fields:

- First Name
- Last Name
- Job Title
- Phone
- Email
- Login ID
- Login Answer

2. Provide the Login ID, Login Question, and Login Answer to your user. This information will help the user login if they forget their password.

3. Click **Save & Exit** when done.



New Vendor User for Cisneros Consulting

Salutation: [v]
 First Name*: Martha
 Last Name*: Camacho
 Job Title*: Sales Manager
 Department: [v]
 Phone*: 626 499 5100 - [v]
 Email*: martha.cisneros@gmail.com
 Login ID*: marthaec
 Status*: Active [v]
 Login Question*: What is your favorite food? [v]
 Login Answer*: pizza

Roles

Seller Can Create Blanket Change Orders
 Seller Administrator Can Upload Contract

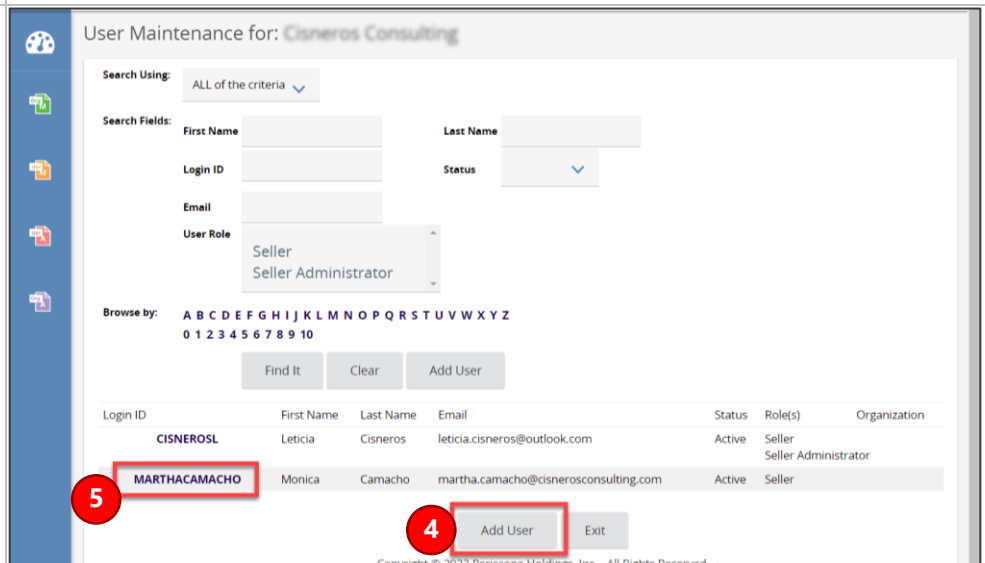
3 Save & Exit Reset Cancel & Exit

Copyright © 2023 Periscope Holdings, Inc. - All Rights Reserved

The new user will be added to the table located at the bottom of the page. The new user will receive an email that will contain a temporary password which will prompt the user to set up a new password.

4. Click **Add User** to add additional users.

5. Click the user's **Login ID** to update user information and to request a password reset.



User Maintenance for: Cisneros Consulting

Search Using: ALL of the criteria [v]

Search Fields: First Name [v] Last Name [v]
 Login ID [v] Status [v]
 Email [v]
 User Role: Seller [v]
 Seller Administrator [v]

Browse by: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
 0 1 2 3 4 5 6 7 8 9 10

Find It Clear Add User

| Login ID | First Name | Last Name | Email | Status | Role(s) | Organization |
|----------------------|------------|-----------|---------------------------------------|--------|--------------------------------|--------------|
| CISNEROSL | Leticia | Cisneros | leticia.cisneros@outlook.com | Active | Seller Seller Administrator | |
| MARTHACAMACHO | Monica | Camacho | martha.camacho@cisnerosconsulting.com | Active | Seller | |

5 **4** Add User Exit

Copyright © 2023 Periscope Holdings, Inc. - All Rights Reserved

Update the user's information as needed. To save the updated information:

6. Click **Save & Continue**.

To request a password reset if the user forgot their password:

7. Click **Reset Password**.

An email will be sent to the user will a temporary password which will prompt the user to set up a new password.

To return to the User Maintenance home page:

8. Click **Save & Exit**

Important: The next time you login to ePro, be sure to change your profile to **Seller** so that you can view bids.

9. Click the **Account** icon.

10. Click the profile drop-down.

11. Select **Seller** profile.