

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



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.

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"/></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.