



Staffordshire County Council eSourcing Portal User Guide

Version 2

(22nd January 2019)

These instructions have been produced to assist suppliers using the electronic sourcing platform. The County Council reserve the right to to update and re-issue the instructions with no prior notification to suppliers. Please note that the instructions are as accurate as possible and the County Council accepts no responsibility where the instructions differ from changes in the platform functionality.

This site operates best using Internet Explorer (versions 9 and above), or the latest versions of Safari, Firefox and Chrome. A screen resolution of 1024 x 768 or above is recommended.

For any urgent technical issues or forgotten passwords please use either the 'Contact Us' facility on the homepage or call Proactis direct on 0330 0050352

It is important that you call Proactis with any issues encountered submitting tenders, especially if you leave uploading until the last day. (not recommended)

the knot unites

A decorative graphic at the bottom of the page consisting of several parallel, wavy lines in shades of gold and yellow, curving from left to right.

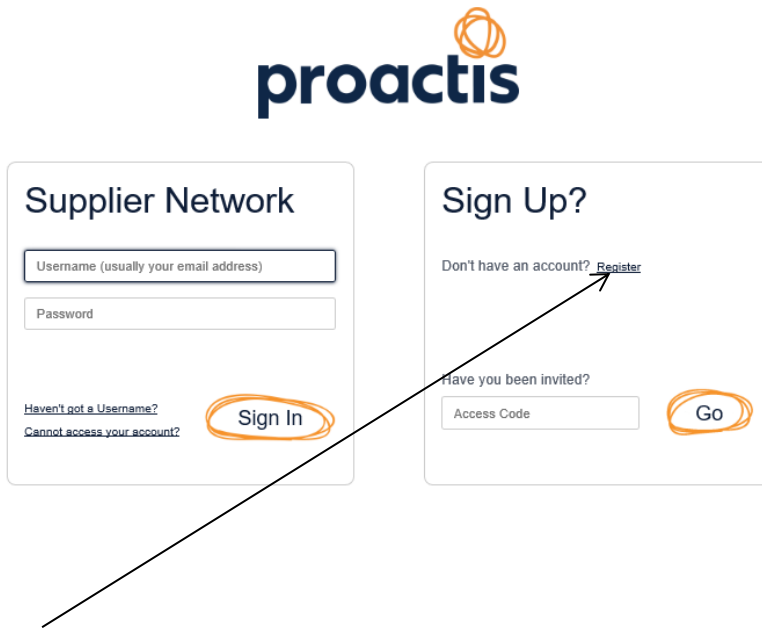
Staffordshire County Council E-Tendering Portal User Guide

Important Information - Points to remember

- It is the supplier's responsibility to ensure that a copy of ALL documentation is retained by the supplier prior to any submission.
- The supplier is required to download this document (and any other) from the portal to a secure location on their own server / computer drive. From this location the supplier is then able to populate and save the questionnaire as requested.
- Please ensure no individual attachment is greater than **10MB** in file/memory size.
- It is recommended that all submissions are PDF formatted prior to submission.
- Ensure that no uploaded portal attachments possess any software virus that prevents the County Council opening the documents post-deadline. Ensure also that any software media / file types used are commonplace to the County Council and that file types are not corrupt when uploaded. **It is always recommended to present documents in a PDF format to avoid such issues.** The County Council reserves the right to disqualify any tender submission which cannot be opened (for the reasons discussed) post-deadline.
- **NOTE** – It is the suppliers' responsibility to maintain an 'active' tender account throughout the process. Accounts tend to become inactive if a supplier mistakenly keys-in an incorrect password several times. It is not the responsibility of the Council to monitor the status of tenderer accounts. Please note for suppliers' who are subsidiaries or franchises of an organisation you will need to have your own email account and register for a password unique to your organisation.
- Please be aware that any tender communications may not be available to view if an account is inactive. In the first instance, please contact the Buyer direct to get the account re-instated. It is required that the supplier regularly checks the status of their tender accounts during a procurement. The Council is not responsible for any missed communications (or the consequences) due to inactive accounts or periods where suppliers take annual leave etc.
- It is the suppliers responsibility to update the eTendering portal with any changes in its staffing
- All returns must be made via the portal only and within the stated timescales.
- Suppliers are required to submit all clarification questions which arise during the Procurement period **in writing using the eTendering portal only**
- Suppliers who decide that they do not wish to apply for an opportunity once they have registered an interest can decline the opportunity. This makes the supplier "inactive" on the opportunity and you will no longer receive dialogues or alerts for that opportunity.

1. Supplier Self Registration

The portal can be found at <https://supplierlive.proactisp2p.com/Account/Login#>



Click 'Sign Up' and populate all the fields including the Organisation ID which is created by the user. All fields with an asterix (*) are mandatory.

Self Registration

Register on our Supplier Network

Please follow these simple steps to register

1. Enter the following information and click the Register button to start the process.
2. An activation email will be sent to the email address of your Primary Contact.
3. Click on the link contained within the email to activate your account.

Not received your activation email yet? [Click here.](#)

Sign in Details	
Email Address *	Repeat Email Address *
<input type="text"/>	<input type="text"/>

Organisation Details	
Organisation Name *	Property Name/Number *
<input type="text"/>	<input type="text"/>
Address 1 *	Address 2
<input type="text"/>	<input type="text"/>
Town *	County
<input type="text"/>	<input type="text"/>
Postcode *	Country *
<input type="text"/>	UNITED KINGDOM

Primary Correspondence Details	
First Name *	Surname *
<input type="text"/>	<input type="text"/>
Telephone Number *	
<input type="text"/>	

Complete the information and click 'Register' at the bottom of the page. The system may ask you to confirm that your organisation is not already registered. Tick the appropriate box and continue. Or the system will explain that your account needs to be authenticated.

Thank you

Your registration is being processed.



1. An activation email has been sent to the email address of your primary contact.
2. Click on the link contained within the email to activate your account.



The system will send you an email. Check all mail boxes; including trash and spam. Click the link 'Click here to activate your account' in the email to return to the Portal and enter your details. It is important that you do this within 24 hours of receiving the email. Complete the fields and click 'Next'.

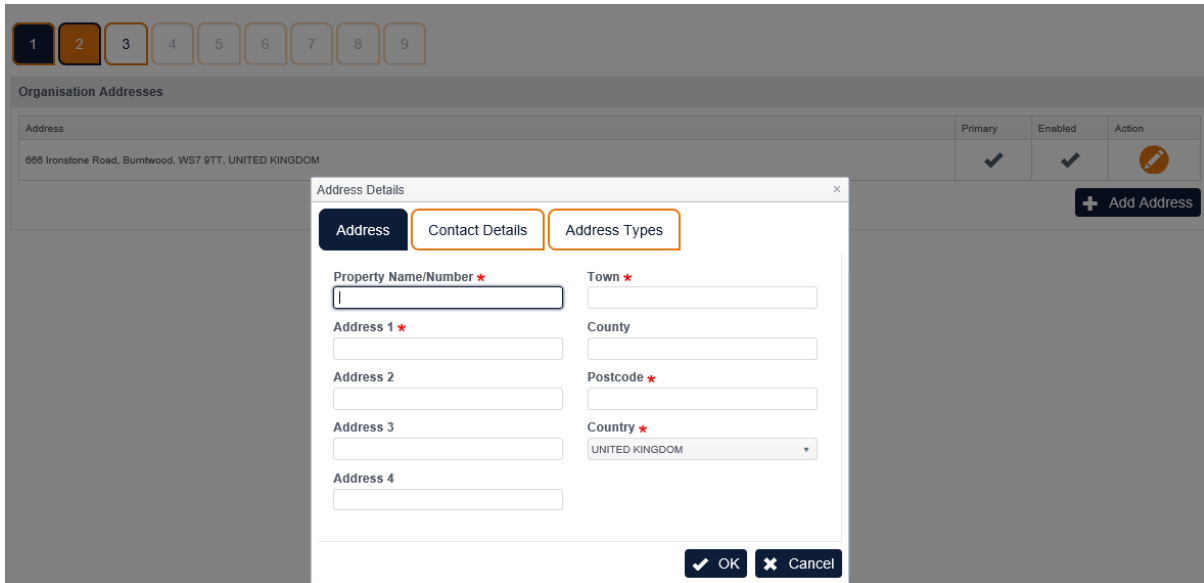
Step One: Organisation Details


The screenshot shows the 'Self Registration | Step 1 of 9' interface. At the top, there is a navigation bar with a 'Save & Continue Later' button, 'Back' and 'Next' buttons, and a 'Welcome' tooltip. The tooltip contains the text: '1 Welcome Don't worry! There are a number of steps you need to go through in order to complete your registration but go at your own pace. We automatically save your data after each step and you can click 'Save & Continue Later' if you want to save what you've done and come back to it when you have more time. Click 'Next' to take the short tour.' Below the navigation bar is a progress indicator with steps 1 through 9, where step 1 is highlighted. The main form area is titled 'Organisation Details' and contains several sections: 'Organisation Name' with a text input field containing 'Think Pad Ltd'; 'Registration Number', 'VAT Number', and 'DUNS Number' each with a text input field and a 'Not Applicable' checkbox; 'Construction Industry Scheme (CIS) Details' with a 'CIS Registration Type' dropdown menu; and 'Organisation Type' with a list of radio button options: Public Company, Limited Liability Company, Partnership, Sole Trader, Limited Liability Partnership, Government Body, and Third Sector. A blue arrow points from the 'Next' button in the tooltip to the 'Next' button in the form navigation.

Complete the fields or select 'Not Applicable'. Once complete click the next arrow  to move onto step two. Your profile can be amended at any time after registration using the arrow icon  in the top right corner. There is a tour available to help you understand the system

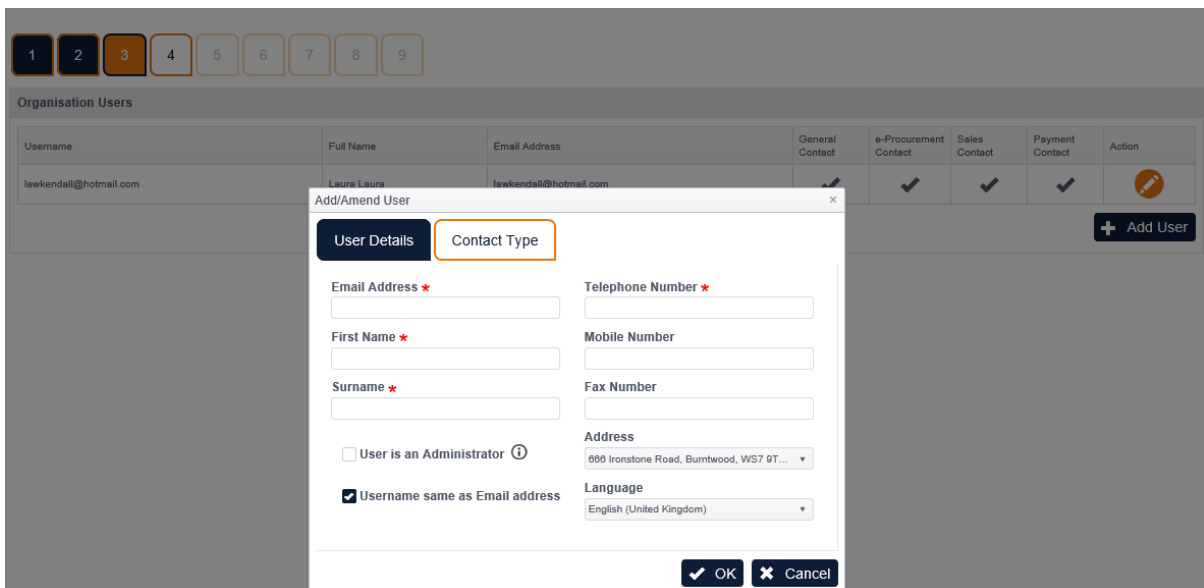
Step Two: Addresses

If you wish to add more addresses click on 'Add Address' and populate the fields, click 'Ok' to save.



To amend an address, click the pencil . Work through the tabs. Click 'Ok' to save or 'Cancel' to close the box. Click 'Next' to move to Step Three.

Step Three: Users



Click 'Add User' to add additional staff to your account. Click 'Ok' to save or 'Cancel'. To edit details of an existing user, click the pencil underneath the Action tab or click 'Next' to move on.

Step Four: What you Sell

The system uses CPV (Common Procurement Vocabulary) classification codes to identify what you sell. In the search box type key words that describe what you sell and click. The results will be displayed below.



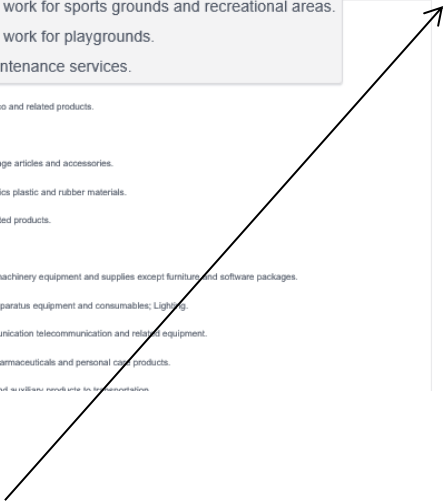
Save & Continue Later Back Next

La

- 1
- 2
- 3
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- 5
- 6
- 7
- 8
- 9

Grounds|

43325100 : Grounds-maintenance equipment.	➤	Added
45112720 : Landscaping work for sports grounds and recreational areas.	➤	
45112723 : Landscaping work for playgrounds.	➤	
77314000 : Grounds maintenance services.	➤	
<input type="checkbox"/> 15000000 : Food beverages tobacco and related products. <input type="checkbox"/> 18000000 : Agricultural machinery. <input type="checkbox"/> 18000000 : Clothing footwear luggage articles and accessories. <input type="checkbox"/> 19000000 : Leather and textile fabrics plastic and rubber materials. <input type="checkbox"/> 22000000 : Printed matter and related products. <input type="checkbox"/> 24000000 : Chemical products. <input type="checkbox"/> 30000000 : Office and computing machinery equipment and supplies except furniture and software packages. <input type="checkbox"/> 31000000 : Electrical machinery apparatus equipment and consumables; Lighting. <input type="checkbox"/> 32000000 : Radio television communication telecommunication and related equipment. <input type="checkbox"/> 33000000 : Medical equipments pharmaceuticals and personal care products. <input type="checkbox"/> 34000000 : Transport equipment and vehicles road use in transportation.		



Click on the arrows to add/remove the category to your profile. Repeat as required. Click ➤ to move to the next step.

Step 5: Buyer Selection



Save & Continue Later Back Next



- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9

Select Buyer Organisations

Title	Town	Post Code	County	Country
Bristol City Council	Bristol	BS1 6EE		United Kingdom
Caerphilly County Borough Council	Bargoed	CF81 8AB	Caerffili	UNITED KINGDOM
Cardiff Council	Cardiff	CF10 4UW		UNITED KINGDOM
Coillte	Newtownmountkennedy		Co. Wicklow	IRELAND
Denbighshire County Council	Denbigh	LL16 3RJ	Denbighshire	UNITED KINGDOM
Department for Education	Sheffield	S1 2FJ		GB
East Midlands Strategic Commercial Unit	Arnold	NG5 8PP	Nottinghamshire	UNITED KINGDOM
Flintshire County Council	Mold	CH7 6NB	Flintshire	United Kingdom
North of England Commissioning Support Unit (NECS)	Leeds	LS2 7UE	West Yorkshire	UNITED KINGDOM
PeoplePlus	Sheffield	S2 4SW	South Yorkshire	UNITED KINGDOM
Somerset County Council	Taunton	TA1 4DY	Somerset	UNITED KINGDOM
Staffordshire County Council	Staffordshire County Council	ST16 2DH	Staffordshire	UNITED KINGDOM

This allows you to be included into a buyer's directory for private tender invites etc. Ensure that you select 'Staffordshire County Council' as a minimum by ticking the box. Click ➤ to move on.

Step Six: Primary Contact Details



[Save & Continue Later](#) [Back](#) [Next](#)

Laura Lau
Think Pad



Primary Contact Details

Organisation Name

Email Address *

First Name *

Surname *

Telephone Number *

The primary contact has overall administration rights for the supplier. Confirm the details are correct and click [Next](#) to move to Step Seven.

Step Seven: Notification Alerts

The system sends notification to registered users of the account. As a default all notifications are ticked. This can be changed by unchecking a particular line



[Save & Continue Later](#) [Back](#) [Next](#)

Laura Lau



Notification Details

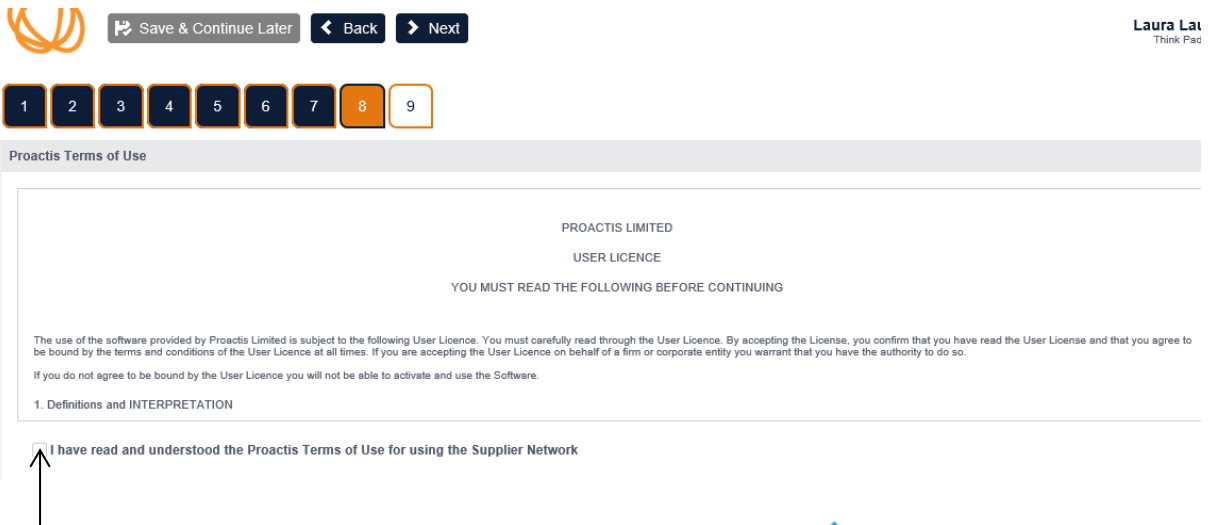
This is the full list of email notifications and they are all enabled at present. You can select/deselect whichever ones you require. Ongoing changes can be made via the Preferences tab under Your Business

Select/Unselect all options here.

Notification Subscriptions

- Notification of new Buyer Dialogue on an Assessment
- Notification of being assigned to Issue for an Assessment
- Notification of Update to an Issue for Assessment
- Notifications of new Buyer Dialogue in Contracts
- Reminders sent to Suppliers when their Documents are nearing their expiry
- Notifications of new Buyer Dialogue in Opportunities
- Notification of new Buyer Dialogue in Sourcing Requests
- Supplier notifications for amendments to RFX Request Documents
- Notifications of tender closing date changes
- e-Sourcing project participation status change notifications
- Questionnaire Completion Requests

Step Eight: Terms and Conditions



Save & Continue Later Back Next

1 2 3 4 5 6 7 8 9

Proactis Terms of Use


PROACTIS LIMITED
USER LICENCE
YOU MUST READ THE FOLLOWING BEFORE CONTINUING

The use of the software provided by Proactis Limited is subject to the following User Licence. You must carefully read through the User Licence. By accepting the License, you confirm that you have read the User Licence and that you agree to be bound by the terms and conditions of the User Licence at all times. If you are accepting the User Licence on behalf of a firm or corporate entity you warrant that you have the authority to do so.

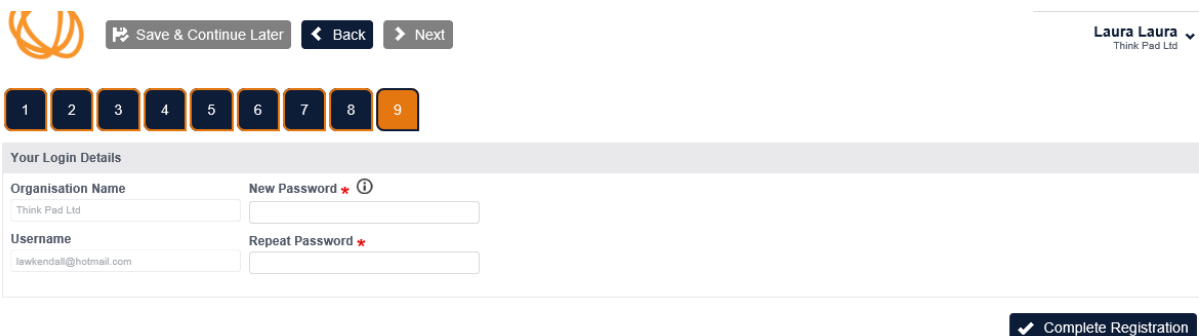
If you do not agree to be bound by the User Licence you will not be able to activate and use the Software.

1. Definitions and INTERPRETATION

I have read and understood the Proactis Terms of Use for using the Supplier Network

Tick to agree with the Terms and Conditions of using the Portal. Click  to move to the final step.

Step Nine: Complete Registration



Save & Continue Later Back Next


1 2 3 4 5 6 7 8 9

Your Login Details

Organisation Name Think Pad Ltd New Password * ⓘ

Username lawkendall@hotmail.com Repeat Password *

Complete Registration

Create your password which must be between 4 and 15 characters in length and contain at least 2 numbers. Passwords expire every 2 months. Then click  you will then be brought to your homepage within the Portal (below).



2. Home Screen Explained

Notifications – Displays any buyer notifications that require your attention.

Opportunities – Displays opportunities from UK organisations which use Proactis, allows you to express an interest and submit your tender response.

Orders – Displays orders raised to your organisation.

Invoices – View, print and resend invoices to the customer.

Customer Relationships – Search and manage trading requests between you and your customers

Customer Requests – Search and manage trading requests between you and your customers

Auctions – Displays available auctions

Contracts – Displays contracts awarded to your organisation

You can select which one you require from either the main tiles or the blue side bar on the left

3. Search for an Opportunity & Submit a Tender

Select 'Opportunities' which will display current opportunities or search in the search box.

From here you can review the requests that have been sent to you by customers and create responses.

Search by customer reference, title or customer name...

Closing Date From:

Announcement Type:

Response Status:

Registered Interest?:

Include Expired?

Reference	Customer Name	Title	Type	Closing Date	Time Remaining	Show Me
GSC1000582REQ	Flintshire County Council	Provision of Assisted Garden Maintenance Service	Advertised	22/01/2019 12:00	2 hours 47 minutes	<input type="button" value="➔"/>

You can use the 'Filters' button to search only for the tenders that you have expressed an interest in by amending the drop down boxes.

Click the to view more information and to register your interest in the tender.

From here you can review the requests that have been sent to you by customers and create responses.

Search by customer reference, title or customer name...

Reference	Customer Name	Title	Type	Closing Date	Time Remaining	Show Me
GSC1000582REQ	Flintshire County Council	Provision of Assisted Garden Maintenance Service	Advertised	22/01/2019 12:00	2 hours 52 minutes	<input type="button" value="➔"/>
WKS1000240REQ	Denbighshire County Council	New Short Stay Car Park & Landscaping Works - Rhyd	Advertised	25/01/2019 12:00	3 days 2 hours	<input type="button" value="➔"/>
EREQ1003337	Torfaen County Borough Council	Provision of housing and related support services to meet the needs of vulnerable people in Torfaen	Advertised	28/01/2019 12:00	0 days 2 hours	<input type="button" value="➔"/>
RQST12590	Caerphilly County Borough Council	Childcare Provision at Idris Davies School	Advertised	28/01/2019 12:00	8 days 2 hours	<input type="button" value="➔"/>
SREQ1000063	University of Essex	Soft market testing event for the provision of furniture and related services	Advertised	30/01/2019 23:59	8 days 14 hours	<input type="button" value="➔"/>
NECSeReq1000321	North of England Commissioning Support Unit (NECS)	NHSE481 - Child Health Information Services	Advertised	31/01/2019 12:00	9 days 2 hours	<input type="button" value="➔"/>
SREQ1002664	Staffordshire County Council	IA1512 - Redevelopment, Project Management and Design of Play Facilities at Charnley Road Open Space	Advertised	31/01/2019 12:00	9 days 2 hours	<input type="button" value="➔"/>
GSC1000288REQ	Denbighshire County Council	Rhyd1 Trip Project	Advertised	31/01/2019 15:00	9 days 5 hours	<input type="button" value="➔"/>
ERFX1004685	Cardiff Council	Fleet Replacement of Heavy Plant Vehicles on a Contract Hire Basis with Full Maintenance	Advertised	01/02/2019 12:00	10 days 2 hours	<input type="button" value="➔"/>
RQST12588	Caerphilly County Borough Council	Capel y Babell - Restoration Works	Advertised	01/02/2019 12:00	10 days 2 hours	<input type="button" value="➔"/>

1 - 10 of 97 Items

SREQ1002664 Staffordshire County Council IA1512 - Redevelopment, Project Management and Design of Play Facilities at Charnley Road Open Space Advertised 31/01/2019 12:00 9 days 2 hours

Opportunity | SREQ1002664

Description

Stafford Borough Council (SBC) is seeking to commission a suitably qualified and experienced company for the project management, design, supply and installation of all equipment and associated impact absorbing surfacing. Include for all necessary ground works, surfacing, landscaping and reinstatement.

The successful applicant must be able to provide a fully managed service regarding the contract and provide one main point of contact within the organisation who will project manage the contract. Under no circumstances are applicants allowed to discuss this contract with members of the public.

The site is approximately 5.4 hectares in size, accommodating a traditional play area, Multi Use Games Area (MUGA), three adult size grass football pitches, playing fields, car park and changing facilities for the football pitches.

The project start date and end date will depend on the work plan submitted by each supplier. Please note the project will need to be completed by 31st December 2019.

Contract Start Date
11 February 2019

Contract End Date
31 December 2019

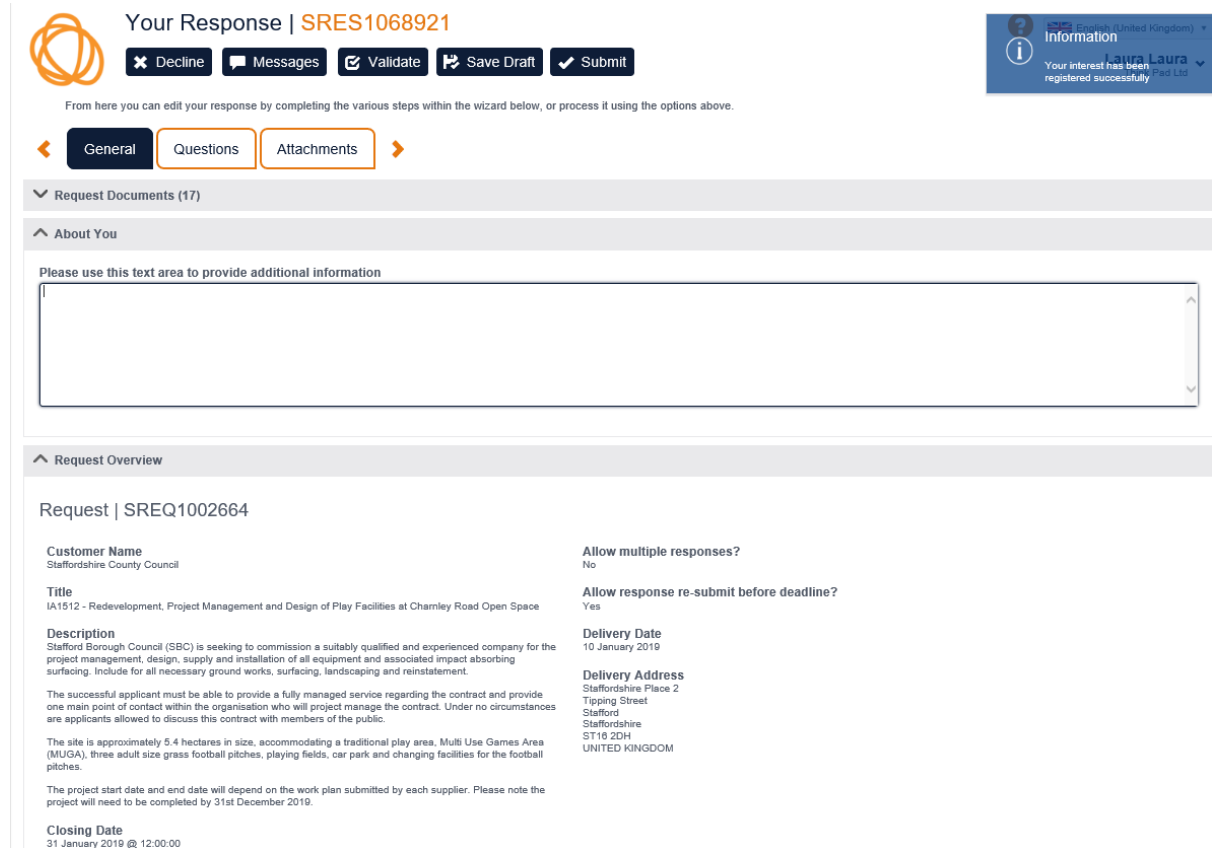
Delivery Address
Staffordshire Place 2
Tipping Street
Stafford
Staffordshire
ST16 2DH
UNITED KINGDOM

Purchasing Contact
Michelle Davies
0178277119
michelle.davies@staffordshire.gov.uk

To express your interest against an opportunity, click 'Register Interest'. Your organisation will now receive any communication regarding that opportunity. When you go back to the 'Opportunities' page, your chosen tender will be labelled 'Private'.

4. Create a Response

Once you register your interest it will take you through to show the actual tender and the full details.



Your Response | SRES1068921

From here you can edit your response by completing the various steps within the wizard below, or process it using the options above.

Request Documents (17)

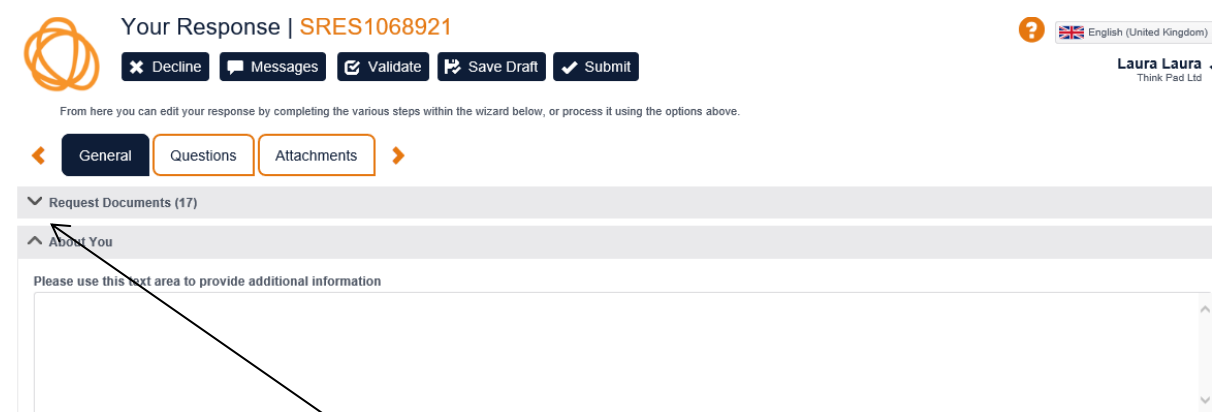
About You

Please use this text area to provide additional information

Request Overview

Request | SREQ1002664

Customer Name Staffordshire County Council	Allow multiple responses? No
Title IA1512 - Redevelopment, Project Management and Design of Play Facilities at Charnley Road Open Space	Allow response re-submit before deadline? Yes
Description Stafford Borough Council (SBC) is seeking to commission a suitably qualified and experienced company for the project management, design, supply and installation of all equipment and associated impact absorbing surfacing. Include for all necessary ground works, surfacing, landscaping and reinstatement. The successful applicant must be able to provide a fully managed service regarding the contract and provide one main point of contact within the organisation who will project manage the contract. Under no circumstances are applicants allowed to discuss this contract with members of the public. The site is approximately 5.4 hectares in size, accommodating a traditional play area, Multi Use Games Area (MUGA), three adult size grass football pitches, playing fields, car park and changing facilities for the football pitches. The project start date and end date will depend on the work plan submitted by each supplier. Please note the project will need to be completed by 31st December 2019.	Delivery Date 10 January 2019
Closing Date 31 January 2019 @ 12:00:00	Delivery Address Staffordshire Place 2 Tipping Street Stafford Staffordshire ST16 2DH UNITED KINGDOM



Your Response | SRES1068921

From here you can edit your response by completing the various steps within the wizard below, or process it using the options above.

Request Documents (17)

About You

Please use this text area to provide additional information

Download and read the 'Request Documentation' that the buyer has provided as part of the tender. Some of the documents need to be completed and returned to the buyer. The documents should be saved to your own computer to allow you to work on the opportunity

5. Returning a response

To do this suppliers should navigate back to the opportunity.

Suppliers should ensure that you have completed any questions from under the questions tab

The screenshot shows the 'MANDATORY DOCUMENT UPLOAD' section of a tender response wizard. At the top, there are navigation buttons: Decline, Messages, Validate, Save Draft, and Submit. Below these are tabs for General, Questions, and Attachments. A message states: 'Please complete the following questionnaire from Staffordshire County Council. Your answers will be automatically saved every five minutes. You can also hit the Save button at any time if you want to stop and finish off later.' Another message says: 'You must fill in all questions with a * next to them.' The section is titled '1 : MANDATORY DOCUMENT UPLOAD (5 questions)'. It contains four questions: 1.01 'Please attach your completed Pricing Return for this tender.' with an 'Attach file...' button; 1.02 'Please attach your completed Quality Questionnaire / Tender Return document for this tender.' with an 'Attach file...' button; 1.03 'Confirm that all other supporting documentation has been uploaded to the "ATTACHMENTS" screen.' with a checkbox; and 1.04 'Please provide as an attachment on letter headed paper the following information:-' followed by a list of required information: Company Name, Company Address (that will appear on the invoice), Bank Details (Bank Name, Bank Address, Account Name, Sort Code & Account Number), Unique Tax Reference Number, An email address for the receiving of Remittance Advice, and An email address for the receiving of Electronic Purchase Orders. An 'Attach file...' button is provided for this section.

Suppliers will not be able to return a tender submission unless the Mandatory questions on this screen have been completed.

To return a response you need to do this this via the 'Attachments' button.

The screenshot shows the 'Your Files' section of the tender response wizard. At the top, there are navigation buttons: Decline, Messages, Validate, Save Draft, and Submit. Below these are tabs for General, Questions, and Attachments. A message states: 'If required please use the options below to add Attachments to your response. Select an attachment type, add or drag and drop a file and then click "Upload files".' The section is titled 'Your Files' and contains an 'Attachment Type' dropdown menu with the text 'Select a type...'. Below the dropdown is an 'Attach files...' button and a 'Or drag and drop files here' area.

Under the “Your Files” section, choose the attachment type then press the “**Attach Files**”, this will lead you through the process to add a document from your computer.

Your Response | SRES1068921

Decline Messages Validate Save Draft Submit

From here you can edit your response by completing the various steps within the wizard below, or process it using the options above.

General Questions Attachments

If required please use the options below to add Attachments to your response. Select an attachment type, add or drag and drop a file and then click 'Upload files'.

Your Files

Attachment Type
Generic Documents

Attach files

Or drag and drop files here

Uploaded Files

Name	Type	Download	Remove
No items to display			

Once the file has been attached press “**Upload Files**”.

From here you can edit your response by completing the various steps within the wizard below, or process it using the options above.

General Questions Attachments

If required please use the options below to add Attachments to your response. Select an attachment type, add or drag and drop a file and then click 'Upload files'.

Your Files

Attachment Type
Generic Documents

Attach files...

Or drag and drop files here

PO000047488.pdf

Upload files

Uploaded Files

Name	Type	Download	Remove
No items to display			

Failure to select both “attach” and “upload” for each document will result in documents not being submitted. Please note the submit button will still function irrespective of whether documents are attached or not.

All uploaded files will then be listed below the “Uploaded Files” section. A file will have only been successful if it highlights green and populates under this section.

If after you have selected the “Upload Files” button and your document gets a red bar across the document name (as shown below) then this file has **NOT** uploaded and therefore it will not have been uploaded or submitted.

Suppliers will have to try variations in re-uploading this – files size, file type, length of file name etc. as there is a problem with the document. Normally the error occurs due to the file name being too long.

Please Note: The Proactis system does not allow you to directly upload macro-enabled Excel documents, i.e. those files which have an extension .XLSM. Should you need to do this then please ZIP the Excel file, which the system will then readily accept.



- Decline
- Messages
- Validate
- Save Draft
- Submit

From here you can edit your response by completing the various steps within the wizard below, or process it using the options above.

- General
- Questions
- Attachments

If required please use the options below to add Attachments to your response. Select an attachment type, add or drag and drop a file and then click 'Upload files'.

Your Files

Attachment Type
Generic Documents

Attach files...
Or drag and drop files here

PO000047488.pdf
PO000047488.pdf

Uploaded Files

Name	Type	Download	Remove
PO000047488	Generic Documents		

1 - 1 of 1 Items

Please note the receiving meg limit is **10MB** and generic documents is set to “any type of file”.

A drag and drop functionality is available for use when adding attachments. Should suppliers wish to use this functionality please be aware that you must still select the upload button to ensure that you documents are attached to the response correctly.

You can then review or remove any file if required. Use of the 'Validate' button may assist in showing some areas of the tender you have not completed. Once you are happy with your submission and have uploaded the correct documentation click '**Submit**'.

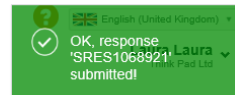
The below will appear if you have completed all sections of the response.

Your Opportunities

From here you can review the requests that have been sent to you by customers and create responses.

Search by customer reference, title or customer name... Search Filters

Reference	Customer Name	Title	Type	Closing Date	Time Remaining	Show Me
GSC1000582REQ	Flintshire County Council	Provision of Assisted Garden Maintenance Service	Advertised	22/01/2019 12:00	2 hours 29 minutes	



The screen below will appear if any sections of your response have not been completed

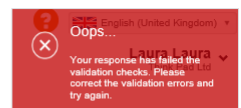
Your Response | SRES1068921

Decline Messages Validate Save Draft Submit

From here you can edit your response by completing the various steps within the wizard below, or process it using the options above.

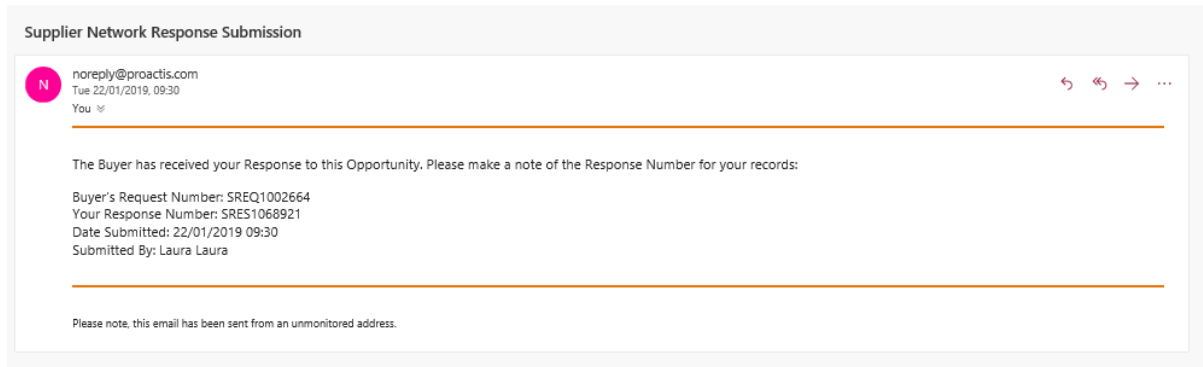
General Questions Attachments

If required please use the options below to add Attachments to your response. Select an attachment type, add or drag and drop a file and then click 'Upload files'.



If the tender does not contain a Question screen, please be aware that the submit button can be selected without any documents being uploaded. Please bear in mind that the system will automatically show the above green message and will also generate the below email even if no documents have been attached. Suppliers must ensure that the documents they wish to submit to the County Council are listed under the uploaded files section.

Once submitted you will receive a reference number / green flag (as shown above) together with a confirmation email as shown here: -



Please retain this email as evidence of submission as without it the Council or Proactis cannot progress any investigation into any perceived irregularity in submissions. Please check all inboxes including spam folders for this email each time you 'submit'.

Please Note: The County Council highly recommend that once a Supplier has clicked the Submit button that they return back to the opportunity to check that the documents which they wish to submit are visible under the "Attachments" section.

This can be done by selecting the "show me" button of the opportunity from the "Opportunities" tab on the home page and then selecting "Attachments"

6. Declining an opportunity

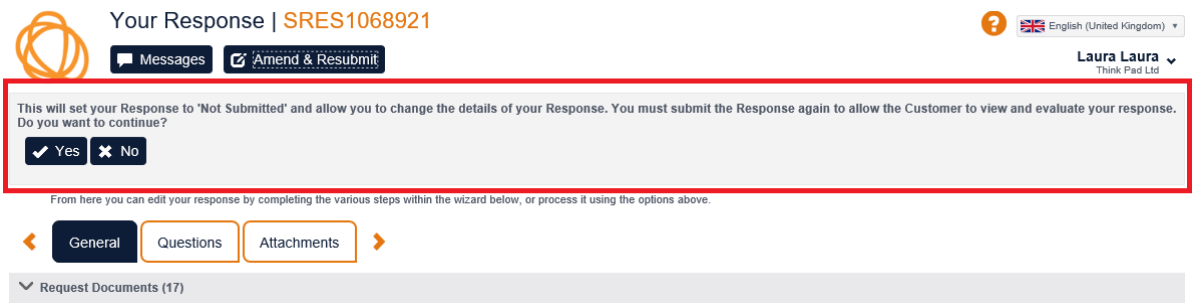
To do this supplier's should navigate back to the opportunity. To decline the opportunity you need to do this this via the 'Decline' button.

By declining an opportunity this makes your organisations status as “inactive” meaning you will no longer receive dialogue alerts in your registered email address for this opportunity. However, any messages that the County Council sends via the messages function will still be viewable by your organisation by navigating back to the opportunity and re-registering your interest.

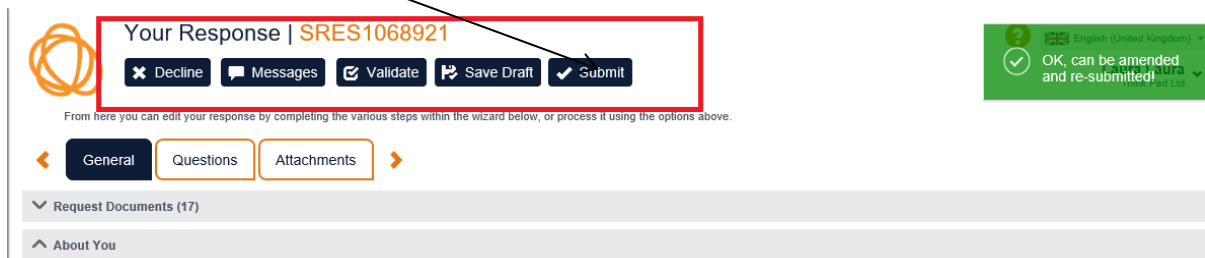
7. Retracting and resubmitting a Bid

The portal allows suppliers to retract and resubmit a bid if required. When you return to the portal your response will have the following:

Once the “**Amend & Resubmit**” button has been clicked all attachments previously uploaded will be removed from the buyers view, the information message shown below warns suppliers ***“This will set your Response to “NOT SUBMITTED” and allows you to change the details of your Response. You MUST submit the Response again to allow the Customer to view and evaluate your response. Do you want to continue?”***



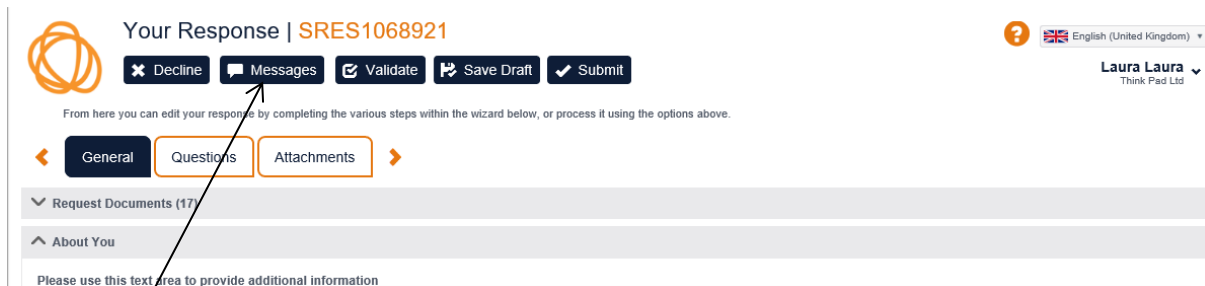
On selecting “**Yes**” you will remove your submitted bid from the County Councils view and you will be required to submit the bid again.



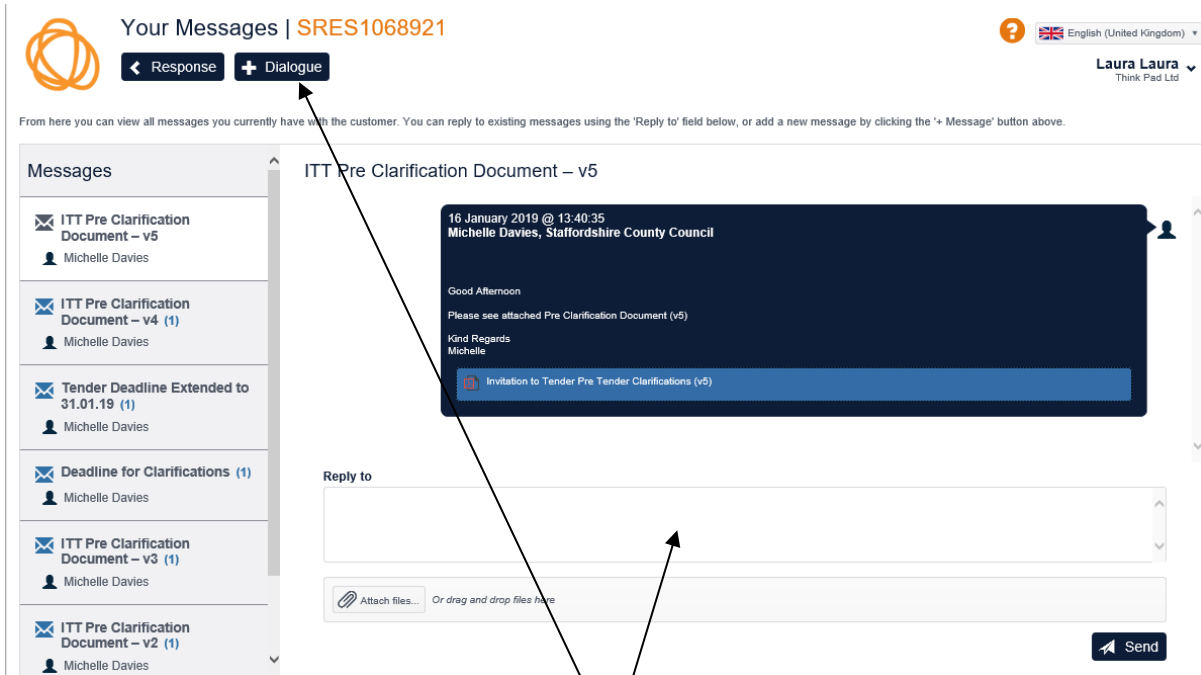
Please note that If you abort the screen at this stage for any reason without selecting the “**SUBMIT**” button you will have submitted **NO** bid.

8. To View or Send a Message/Clarification

Locate the tender you wish to raise a clarification about following the steps above.



Select ‘Messages’



To send a new message to the buyer select + Dialogue, complete the boxes as required followed by 'Send'. The buyer response will also be displayed here.

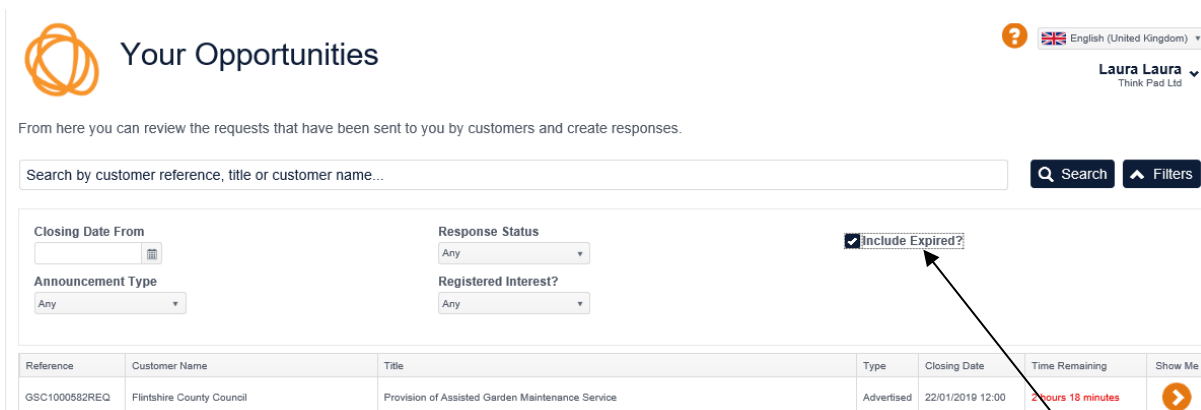
All message received for this opportunity build up on the left-hand side of the screen. You can also reply to a received message by typing in the "Reply to" box and selecting send

Suppliers are advised to periodically check the system for messages from the buyer and not be reliant on email prompts from the system

9. Viewing Submitted Documents Pre/Post Tender Deadline

If required, Suppliers can view submitted documents pre/post the tender deadline by doing the following:-

From the home screen select "**Opportunities**", ensure '**Filters**' is pressed, and then ensure the menus and tick box is checked as follows: -



Enter your project number of the expired tender (if known), ensuring you select the "Include Expired" and hit 'Search'

IA1143 Search Filters

Closing Date From: Response Status: Any Include Expired?

Announcement Type: Any Registered Interest?: Any

Reference	Customer Name	Title	Type	Closing Date	Time Remaining	Show Me
SREQ1002076	Staffordshire County Council	IA1143 Civic Centre Car Park Extension	Advertised	01/10/2018 12:00	Expired	

If you are looking for the project post tender deadline the project should show as 'Expired' with the 'Show Me' link next to it. Press 'Show Me': -

If you are searching pre tender deadline, then the opportunity will be displaying the time remaining before deadline.

Press 'Attachments'. This will display the documents that the buyer should have received when it was opened after the deadline: -

Your Response | SRES1038176 English (United Kingdom) Paul Timmins Rock and Roll Drums

Messages Amend & Resubmit

From here you can edit your response by completing the various steps within the wizard below, or process it using the options above.

General Questions **Attachments**

Your Files

Uploaded Files		
Name	Type	Download
ESPO Contact	Generic Documents	

1 - 1 of 1 items

You may also have more documents on separate screens as shown by the prompts circled in red below.

Your Files

Uploaded Files		
Name	Type	Download
003PC583 Specification and Memorandum of Understanding (120214)	General Document	
003PC583 ITT Procurement Pack - (120214)	General Document	
003PC583 ITT Questionnaire - RETURN TO BUYER (030214)	General Document	
005PC583 Lot 1 - Pricing (Building) - RETURN TO BUYER (040314) version 2	General Document	
006PC583 Lot 2 - Pricing (Mechanical) - RETURN TO BUYER (040314) version 2	General Document	

1 - 5 of 6 items

10. Viewing Messages Post Tender Deadline

Where applicable, Suppliers may receive dialogue messages from the buyer after the tender deadline. These messages can be viewed by doing the following:-

From the home screen select "Opportunities", ensure 'Filters' is pressed, and then ensure the menus and tick box is checked as follows: -



From here you can review the requests that have been sent to you by customers and create responses.

Search by customer reference, title or customer name... Search Filters

Closing Date From: Response Status: Any Include Expired?

Announcement Type: Any Registered Interest?: Any

Reference	Customer Name	Title	Type	Closing Date	Time Remaining	Show Me
GSC1000582REQ	Flintshire County Council	Provision of Assisted Garden Maintenance Service	Advertised	22/01/2019 12:00	2 hours 18 minutes	

Enter your project number (PC583 is the example here) and hit 'Search' to show the following: -

IA1143 Search Filters

Closing Date From: Response Status: Any Include Expired?

Announcement Type: Any Registered Interest?: Any

Reference	Customer Name	Title	Type	Closing Date	Time Remaining	Show Me
SREQ1002076	Staffordshire County Council	IA1143 Civic Centre Car Park Extension	Advertised	01/10/2018 12:00	Expired	

If you are looking for the project post tender deadline the project should show as 'Expired' with the 'Show Me' link next to it. Press 'Show Me': -

If you are searching pre tender deadline, then the opportunity will be displaying the time remaining before deadline.

Press 'Messages'. This will display the messages that the buyer/supplier will have sent and received during the tender process: -

Your Response | SRES1038176 English (United Kingdom)

Messages Amend & Resubmit

From here you can edit your response by completing the various steps within the wizard below, or process it using the options above.

General Questions Attachments

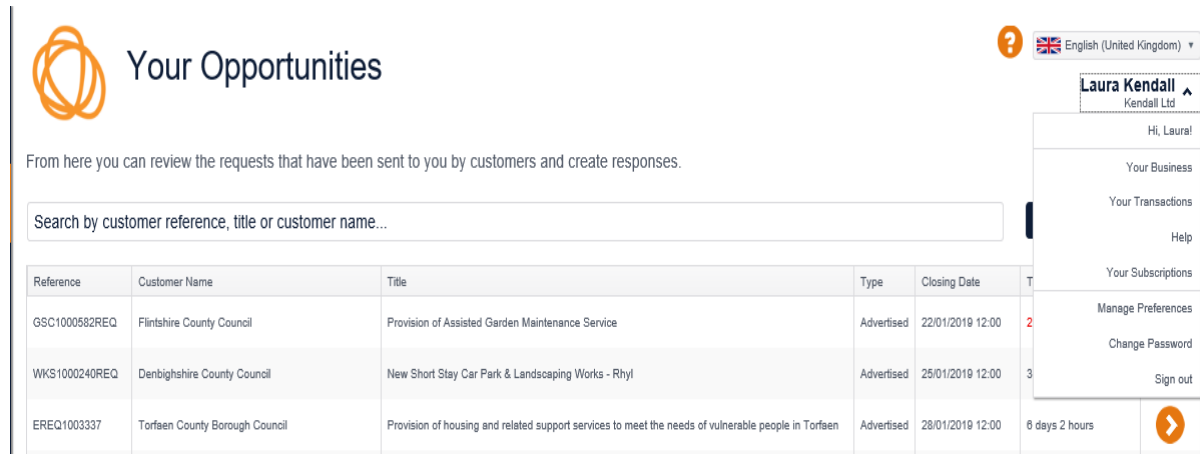
Request Documents (5)

About You

11. Changing your organisation details

There may be occasions when you need to amend the details of your organisation. To do this follow these simple steps...

- a) Log in to the Proactis supplier portal
- b) From the top right hand screen under your organisation name, select the arrow to expand the drop down list, Select "Your Business"
- c) Navigate through the options to review and amend your details
- d) Once all amendments have been made select "Save"



The screenshot displays the 'Your Opportunities' section of the Proactis supplier portal. At the top left is the logo and the text 'Your Opportunities'. Below this is a message: 'From here you can review the requests that have been sent to you by customers and create responses.' A search bar is provided with the placeholder text 'Search by customer reference, title or customer name...'. Below the search bar is a table of opportunities. To the right of the table is a user profile dropdown menu for 'Laura Kendall' from 'Kendall Ltd', which includes options like 'Hi, Laura!', 'Your Business', 'Your Transactions', 'Help', 'Your Subscriptions', 'Manage Preferences', 'Change Password', and 'Sign out'.

Reference	Customer Name	Title	Type	Closing Date	T
GSC1000582REQ	Flintshire County Council	Provision of Assisted Garden Maintenance Service	Advertised	22/01/2019 12:00	2
WKS1000240REQ	Denbighshire County Council	New Short Stay Car Park & Landscaping Works - Rhyf	Advertised	25/01/2019 12:00	3
EREQ1003337	Torfaen County Borough Council	Provision of housing and related support services to meet the needs of vulnerable people in Torfaen	Advertised	28/01/2019 12:00	8 days 2 hours