



SUPPLIER GUIDE

FOR

COMPLETING THE RESPONSE
(QUESTIONNAIRES) WITHIN
PROCONTRACT

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Responding to Online Questionnaires

When a tender is published an e-mail will be sent by the system to inform you of this, and that the exercise (Pre-Qualification Questionnaire, Invitation to Tender or the Request for Quotation) can now be viewed and worked on.

Note: While this section covers the questionnaire within a PQQ (Pre-Qualification Questionnaire) process, it remains the same for the return of any questionnaire, it is just the specific wording/questions that will change, the functionality will not.

Viewing the Exercise Details/ Questionnaire

Login to the system and it will take you to the screen highlighted below

Buyer	Title	Current event	Event deadline
ESPO	Test 11 for guidance notes	Test 11 for guidance notes	24/01/2019

From the drop down menu select the organisation which advertised the opportunity, in this instance ESPO. Then you will be able to see your current activities that you are working on, from the "Activities" section, click on the title of the Activity you wish to work on.

The Activities area shows all the various tenders that you are involved with (expressed an interest), so this can be an ITT (Invitation to Tender), RFQ (Request for Quotation), PQQ (Pre-Qualification Questionnaire) etc.

Buyer	Title	Current event	Event deadline
Cheshire	Example Project	Example ITT	22/04/2015
Cheshire	(a) Accommodation for Service User(s)	(a) Accommodation for Service Users	28/01/2016

Note: The process is the same in the system for all types of tender opportunity, PQQ, ITT and RFQ's, etc., however in this case the ITT has been chosen to look through, and the ITT will be referred to at various points.

As you can see above, the Buyer, title of the project, current event and event deadline is shown. In this case it shows a  symbol to reflect it is new and it has not yet been viewed or worked on yet.

By clicking on the title in blue, further information is now shown. From this screen all aspects of this project can be dealt with; the tender can be viewed, questions can be asked and answers received, additional information can be issued and your response can be put together and sent to the contracting organisation. Each stage of the procurement process will be seen as its own section.

To view the relevant stage of the project click **Start** within the relevant stage.

[Home](#) > [Test 11 for guidance notes](#) [< Back to home page](#)

Activity : Test 11 for guidance notes

Events

Test 11 for guidance notes	Not started (Respond by: 24/01/2019)	Hide details Start
Activity type:	ITT	
Reference:	5267713	
Respond by:	24 January 2019 at 17:00	
Response status:	Not started	

[Archive this activity](#)

Messages (0)

You have received 0 message(s) of which 0 are unread

[View all](#) | [View unread](#)

Audit history

[View audit history](#)

This will open the tender screen. This is broken up into different sections: activity information, question sets, messages and clarifications. **Note:** There is also a **countdown timer** in the top right indicating the time left until the submission deadline.

[<Back to dashboard](#)

Activity Information

Buyer: ESPO
Title: Test 11 for guidance notes ID: 5267713
Description: Test 11

Evaluation criteria/question sets

Title	Questions		
	Mandatory	Online	Internal
Invitation to Tender (190)	74	94	0

Deadline & Time remaining

A response to this activity can be submitted no later than
24th January 2019 at 5:00 PM

Time remaining

1 5 3 41
Day Hours Minutes Seconds

Messages & Clarifications (0)

This panel will show any messages & clarifications that have been sent to you concerning this activity from the buyer

You have received 0 message(s) of which 0 are unread

[View all](#) | [View unread](#)

Response controls

[Start my response](#)

[Register intent to respond](#)

[No longer wish to respond](#)

Messages and Clarifications

During the process all questions should be raised using the portal. The ability to ask questions/send messages is found in the Messages section. Anything sent through this area will go to the member of staff that is working on this tender within the procuring organisation. Open this area by clicking on **View Messages**.

Messages & Clarifications (0)

This panel will show any messages & clarifications that have been sent to you concerning this activity from the buyer

You have received 0 message(s) of which 0 are unread

[View all](#) | [View unread](#)

This will show any messages that have already been sent or received. To send a new message, click on the [Create new message](#) button.

Inbox

[Create new message](#) [Export Messages](#) --Actions-- [Go](#)

☐	Ref No	Subject	From	To	Date	Public
☐	9.1	Lot 8 - specifications	Project team		22/01/2019 09:44	

Populate the subject along with the main body of text, and once done then click on the send button. Attachments can also be added (details of adding an attachment within the system is included later in this guide.)

New message

To: Project team

Subject:

Attachments: +

Will the branding be required on the front only, or back too?

Click Send message to issue the message to the procuring organisation.

The sent message is now shown in the Inbox. To see the sent message you need to tick the 'read' box and update.

Messages for Decision event test - Search results

Narrow your results

Read Status

Read

Unread

Flagged

Event Title

All

Invitation to Tender

Portal Advert

Start date End date

Reset Update

Inbox

Create new message Export Messages --Actions-- Go

	Ref No	Subject	From	To	Date	Public
<input type="checkbox"/>	1.1	xxx	supplier_espo_5 company - supplier_espo_5 workgroup	Project team	21/12/2017 15:08	

When a reply to that message is sent by the procuring organisation, you will see that the reply is linked to the original message by the numbering. All messages you send to the procuring organisation will be privately sent to them, shown by the ✔ symbol. When the procuring organisation replies they may reply privately to you alone (✔), or publically so all suppliers involved in this stage can see the response. **Note:** The system will NEVER show which supplier sent the original message.

Narrow your results

Read Status

Read

Unread

Flagged

Event Title

All

Invitation to Tender

Portal Advert

Start date End date

Reset Update

Inbox

Create new message Export Messages --Actions-- Go

	Ref No	Subject	From	To	Date	Public
<input type="checkbox"/>	1.1	xxx	supplier_espo_5 company - supplier_espo_5 workgroup	Project team	21/12/2017 15:08	
<input type="checkbox"/>	2.1	Books supply	Project team	All Suppliers	21/12/2017 15:09	✔

Completing the Response (Online Questionnaires)

To begin the response, from the tender summary screen, click **Start my response**.

[<Back to dashboard](#)

Activity Information

Buyer: ESPO
Title: Test 11 for guidance notes **ID:** 5267713
Description: Test 11

Deadline & Time remaining

A response to this activity can be submitted no later than
24th January 2019 at 5:00 PM

Time remaining

1 5 3 41
Day Hours Minutes Seconds

Evaluation criteria/question sets

Title	Questions		
	Mandatory	Online	Internal
Invitation to Tender (190)	74	94	0

Messages & Clarifications (0)

This panel will show any messages & clarifications that have been sent to you concerning this activity from the buyer

You have received 0 message(s) of which 0 are unread

[View all](#) | [View unread](#)

Response controls

[Start my response](#)

[Register intent to respond](#)

[No longer wish to respond](#)

In the 'Response control' box you also have two additional options:

Register Intent to Respond – this option will notify the buyer about your intention to respond.

No longer wish to respond – you can select this option, if after reading the tender documentation you decide to opt-out from the tender opportunity.

The Response Wizard

This will open up the response wizard that will take you through each stage of the tender response to make sure it is completed successfully. Stage 1 will always contain a welcome message which should be read carefully.

Create ITT response

1 Details 2 Additional information 3 Attachments

Response reference: 107828682

Welcome to the ITT response wizard.

The wizard will assist you with the completion of your response.

You will be presented with a number of different steps to complete. Once each step has been completed you can click the 'Continue' button to proceed to the next step, or 'Back' to return to the prior step or 'Cancel' to exit the wizard.

After the completion of each step, the response information entered will be saved as a draft, which will allow you to resume the response at a later date if required.

Once all the steps have been completed and all mandatory response criteria have been met, you will be asked if you wish to submit your response.

If you agree to submit your response, you will receive a confirmation receipt email. Please note, if you do not receive the confirmation email please contact support as you cannot be guaranteed that your response has been received.

Continue Reset Cancel

From the options section at the bottom of the page click "Continue" to move onto the next page and click "Cancel" to leave the wizard.

Create ITT response

1 Details 2 Additional information 3 Attachments

Supplier reference (optional)

Response information (optional)

Additional comments (optional)

Continue Reset Cancel Back

Completing the Online Questionnaires

The next stage allows you to answer a number of questions from the online Questionnaire.

Note: In some cases an attachment will be mandatory, so it may not let you submit until an attachment is added at this stage.

Create ITT response

1 Details 2 Additional information 3 Question sets

Title	Action	Progress
Invitation to Tender (190)	Edit response	Progress bar

Finish Reset Cancel Back

View evaluation questions

Title	Weight: %	Section status	Status	Flag
Invitation to tender Complete section Section weight: 0.00%				
Invitation to Tender (190)	N/A	Answer question	●	
Selection questions Incomplete section Section weight: 0.00%				
Part 1 - Potential Supplier Information Incomplete section Section weight: 0.00%				
1.1 (a) Full name of the Supplier completing the information	N/A	Answer question	●	
1.1 (b)(i) Registered office address (if applicable)	N/A	Answer question	●	★
1.1 (b)(ii) Registered website address	N/A	Answer question	●	
1.1 (c) Trading status	N/A	Answer question	●	
1.1 (d) Date of registration	N/A	Answer question	●	
1.1 (e) Company registration number	N/A	Answer question	●	
1.1 (f) Charity registration number	N/A	Answer question	●	
1.1 (g) DUNS number	N/A	Answer question	●	
1.1 (h) Registered VAT number	N/A	Answer question	●	
1.1 (i)(i) Professional or trade register(s)	N/A	Answer question	●	
1.1 (j)(i) Legal requirement of possession of a particular authorisation, or to be a member of a	N/A	Answer question	●	

Progress (16%)

Key

- The answer provided is valid and complete.
- The answer has been automatically populated from a previous answer but it must be reviewed before submission.
- Mandatory elements of this question have not been provided.
- ★ The question has been flagged for review.

Public attachments

No attachments

The screen above shows you the sections and relevant questions in each section and the total weighting value of each individual section and question.

Note: Alongside each question, you may have one of the following icons, please see the below descriptions

Key

- The answer provided is valid and complete.
- The answer has been automatically populated from a previous answer but it must be reviewed before submission.
- Mandatory elements of this question have not been provided.
- ★ The question has been flagged for review.

Click on **Answer question** to obtain more information about that question.

[Show more information](#)

Part 1 - Potential Supplier Information | Question 1 of 36

Question

Title:
1.1 (a) Full name of the Supplier completing the information

Description:
Please state the full name of the organisation submitting this tender (and, where applicable, the full name of the organisation acting as the lead contact where a consortium bid is being submitted):

Weight
0.00 %

Section help
General information questions are asked for information purposes only and the responses will not be assessed as pass/fail or scored.

Question help
Maximum of 50 characters.
This question is mandatory
This question is mandatory

Question attachments
No attachments

Answer Flag question for review

You have 49 characters remaining

[Save and close](#) [Save and previous](#) [Save and next](#)

This will now bring up further information, including the title, weighting, and help and public attachments linked to this question. It will also give you the ability to **answer the question**.

There may be further section help available. To view this, click

[Show more information](#)

in the top right of the screen. There is also the ability to **flag a question for review**, by marking the tick box.

When you have answered a question, and are happy to move forward, you can either save and close, which will take you back to the summary page, or click previous / next to move onto the questions before/after this one.

[Save and close](#) [Save and previous](#) [Save and next](#)

As you move through the questionnaire, the **Progress** bar on the summary page will reflect this and show how much has been completed.

View Evaluation questions

Question	Weight %	Section Status	Status	Flag
1 Company Information		Complete section		Section weight: 0.00%
1.1 Company Name	0.00%	Answer question		

Progress

Key

Types of questions

Each question may give different options on how you are required to answer the question. For example, a question might be mandatory or optional, with optional attachment or comments section. Examples of some questions are below:

Yes/No

This type of question requires you to answer either Yes or No.

Pass / Fail Questions | Question 1 of 5

Question	
Do you have an environmental policy?	
Answer	
Yes <input type="radio"/> No <input type="radio"/>	Flag question for review <input type="checkbox"/>
Save and close Previous Next	

Number

This type of question requires you to answer using numerical values.

Financial Details | Question 1 of 2

Question	
What was your company turnover for the last financial year?	
Answer	
<input type="text"/>	Flag question for review <input type="checkbox"/>

Text

You are required to answer this type of question with text. You will be advised of a maximum number of characters.

Company Information | Question 1 of 2

Question	
Company Name	
Answer	
Flag question for review <input type="checkbox"/>	
<input type="text" value="Due North Ltd."/>	
Save and close Previous Next	

Option

This type of question requires you to choose from a drop down list

General Information | Question 1 of 3

Question

How many staff do you currently employ?

Answer

Please select

- Please select
- 0 - 10
- 10 - 25
- 26 - 50
- 50 - 100
- 100+

Flag question for review

Checkbox

To answer this type of question you must check the box alongside the relevant answer(s). It may be that you are able to give more than one answer.

General Information | Question 3 of 3

Question

Which of the following accreditations do you currently hold?

Answer

- ISO27001
- Investor in People
- Other
- N/A

Flag question for review

Attachment

With this type of question you are required to add an attachment as an answer.

Technical Lot Questions | Question 1 of 1

Question

Attach your technical response

Answer

No attachments

Flag question for review

Submitting The Tender Response

When all mandatory questions are answered you can navigate back to the main tender screen by clicking back in the bottom of the questionnaire

Supporting Organisation Selection Questionnaire (Annex 1) N/A Answer question

Back

Then submit the response by clicking **Submit response**. You will be required to confirm this by clicking Submit response for a second time.

My response 108210763 Draft

Additional information Edit

Supplier reference:

Evaluation criteria/question sets

Title	Action	Progress
Invitation to Tender (190)	Edit response	

<Back to summary

Deadline & Time remaining

A response to this activity can be submitted no later than

24th January 2019 at 5:00 PM

Time remaining

1 Day 4 Hours 4 Minutes 24 Seconds

Response controls

Submit response

[Open response wizard](#)

Submission checklist

- Evaluation criteria/question sets

Audit history

[View audit history](#)

If the Submit response button is greyed out, the Submission checklist can be used to pick out why (anything with a red box will need revisiting.)

Note: Please make sure that you have submitted the latest version of the online questionnaire. You should be notified about any amendments to the invitation to tender via email.

Editing Tender Response and Re-Submission

An important feature that is available after the tender response has been submitted is the ability as a supplier to edit this response before the submission time and date has passed.

All the procuring organisation will see, is the version number of the response but no previous submissions, providing they are all returned on time (further information on this later).

To edit a response from the tender summary screen, click **I would like to edit my response**.

The screenshot displays a tender summary interface with several panels:

- Activity Information:** Buyer: ESPO, Title: Decision event test ID: 5264039, Description: Decision event test.
- Attachments:** Public attachments can be viewed by all procurers and suppliers involved in this rfx. Attachment: s-11600.jpg (128 KB).
- Deadline & Time remaining:** A response to this activity can be submitted no later than **21st December 2017 at 5:00 PM**. Time remaining: 0 Days, 1 Hour, 42 Minutes, 26 Seconds. Status: Submitted.
- Messages & Clarifications (0):** This panel will show any messages & clarifications that have been sent to you concerning this activity from the buyer. You have received 0 message(s) of which 0 are unread. View all | View unread.
- Response controls:** I would like to edit my response (highlighted in red), No longer wish to respond.
- My responses:** Version 1 Submitted 21/12/2017 15:17:05.

This close-up shows the 'Response controls' and 'My responses' sections:

- Response controls:** I would like to edit my response (circled in red), No longer wish to respond.
- My responses:**

Version 1	Submitted	23/01/2019 12:56:45
Version 2	Submitted	23/01/2019 15:32:14

When this option is selected a draft version will be created.

Each area can then be amended by editing the relevant section. Once you have edited your response click **Submit Response** and make sure the status of the submission changes from **Draft** to **Submitted**

My response 108210772 **Draft**

Additional information [Edit](#)

Supplier reference:

Evaluation criteria/question sets

Title	Action	Progress
Invitation to Tender (190)	Edit response	

[<Back to summary](#)

Deadline & Time remaining

A response to this activity can be submitted no later than

24th January 2019 at 5:00 PM

Time remaining

1	1	25	29
Day	Hour	Minutes	Seconds

Response controls

Submit response

[Open response wizard](#)

Submission checklist

- Evaluation criteria/question sets

Audit history

[View audit history](#)

Portal Technical Support

Email for Non-emergency issues and General Technical Support

For all non-emergency issues and general support, please contact Due North Technical Support Team via email, ProContractSuppliers@proactis.com. This will auto-log you a support ticket in the PROACTIS Supplier Support Helpdesk, <http://proactis.kayako.com/default>

On logging a ticket, if you have not already logged one before, you will be issued with a registration email that will give you instructions to allow you to log in, review and update your tickets effectively, as well as having full audit records.

Phone number for Time-Sensitive or Emergency Contact only

+44 (0)330 005 0352 (lines open 8.30am – 5.30 pm Monday to Friday
excluding bank holidays)

Prior to contacting the help desk via the phone you should already have logged a support ticket via the method outlined above.

Please note you should use the phone number only in an emergency situation but this should be by exception and not as a rule.

(Note: questions relating to the tender content should be submitted to ESPO by accessing the messaging tool for each tender– please see the introduction pages of this Invitation to Tender for details).