## ProContract User Guide

*Click on ctrl + the link you need, to go to the relevant page:* 

**Registering an Account** 

Logging In and Accessing Contract Opportunities

Drafting and Submitting a Response

**<u>Contacting the Buyer</u>** (and ProContract Contact Details)

**NOTE:** This guide that has been put together by LGSS Procurement to assist potential providers in responding to contract opportunities on ProContract. Potential providers using this guide are still fully responsible for ensuring their responses are submitted correctly. Other support is also available in the form of a ProContract helpdesk (contact details can be found at the end of this document).

### **Registering an Account**

- Enter the Organisation name and your chosen email address
- To read the sites Terms and Conditions click 'Terms and Conditions'
- To Read the sites Privacy Policy click 'Privacy Policy'
- Once you have read and agreed to these click 'Continue Registration'

Register free with ProContract	Minimum requirements
Begin your ProContract supplier account registration by filling in a few details below. Organisation name	Why should I register with ProContact? Registration is free and your company profile will be immediately available for opportunities managed by over 30,000 buyers from over 400 private, public sector and 3rd sector organisations.
Email address  Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address Email address E	What happens next? Once we have verified your company name and email address you will be asked to complete a short registration process including basic company details and contact information. Upon submission, your registration application will be reviewed by the ProContract team and you will be sent an email address confirming next steps.
Continue registration Already registered? Log in here	<b>Do I receive opportunity alerts?</b> Following successful registration, as part of your company profile you can stipulate your preferred opportunity areas of interest along with geographical locations to which you can supply your goods & services. Overnight, your interests will be matched against the latest published opportunities and you will be notified by email. The email will contain links to review, and if you wish, express your interest in each of the opportunities.

• On the next page, you will need to confirm your email address, select a password, entry organisation details, select your primary contact details and confirm your communication preferences.

# **@**LGSS

## Supplier registration

Sign in details					
Your email address will be used as your account username and to send you important account and opportunity information. You can refine your opportunity areas and communication preferences without your account management dashboard.					
Email address Change	Repeat email address				
test@northamptonshire.gov.uk		Your email address will become your username			
Password 🕡	Repeat password				
		Your password must be at least 8 characters long, contain a mixture of UPPERCASE and lowercase letters, numbers and symbols. e.g. PassWord\$123			

• Once selected enter your organisation details, including address and post code.

Organisation details		
Please provide your organisation details below.		
Organisation name Change		
Test1234321		√
Address		
Town	County	
	Please select	
Postal code / zip	Country	
	Please select	~
Website (optional)		
e.g. http://www.example.com		
Registration number (optional)		
e.g. 03182974	Not applicable	
VAT number (optional)		
e.g. GB999 9999 73	Not applicable	

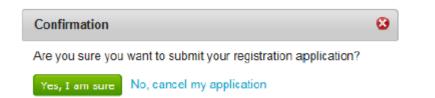
• Once complete, please then confirm your primary contact details.

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Primary contact details		
Please provide your contact details below	ι.	
Title First name		Last name
Job title	Depart	tment
Telephone	Mobile (optional)	Fax (optional)
Communication preferences		Privacy Policy
To receive the full benefits of your ProCo published that you may be interested in.	ntract registration, buying organise	ations may notify you by email when opportunities are
Your interest will be based upon your cho when you log in for the first time.	sen categories of interest and sele	ected region(s) of supply which you will be asked to confirm
These may include, but is not restricted to	o, new opportunity adverts, invitation	ons to tender and clarifications.
Do you want to receive email notificati Yes O No, I acknowledge I may miss		

- Please read the Communication preferences section carefully.
- Click 'Continue registration'.

• The system will then ask you if you want to submit your registration application.



- Click 'Yes, I am sure' to submit your application.
- You will be notified by email when your application has been reviewed and your log in details assigned.

## Logging In and Accessing Contract Opportunities

- Go to <u>https://procontract.due-north.com/Login</u> then enter your login details.
- Note if you are logging in for the first time, you will be asked to select your categories / regions of interest. You can update these at any time within your existing profile.
- Click 'Find Opportunities', then on the drop down menu to filter by 'LGSS' by clicking on 'Update' to find the opportunity you are interested in.

Narrow your results	Opportunities				
Portals      LGSS	1 2 Next>				
	Title	Buyer	Expression Start	Expression End	Estimated value
<ul> <li>Organisations</li> </ul>	Cambridgeshire County Council - Supply of local bus service 34	LGSS	29/04/2016	13/05/2016	N/A
All	Cambridgeshire County Council Mediation and Disagreement Resolution Services for children and young people from 0-25 with Special Educational Needs and Disabilities	LGSS	19/04/2016	26/05/2016	N/A
<ul> <li>Categories ()</li> </ul>	Cambridgeshire County Council Transport Framework 2016 VERSION 2	LGSS	13/04/2016	19/05/2016	N/A
There are 0 categories selected	Disabled Facilities Grant Register of Contractors	LGSS	15/02/2016	13/05/2016	N/A
Add UNSPSC categories	Dynamic Purchasing System (DPS) for Education (Mainstream) Home To School Transport in Cambridgeshire	LGSS	28/04/2016	09/05/2016	N/A
Add NHS eClass categories	East Cambridgeshire District Council - East Cambridgeshire District Leisure Centre Management Contract	LGSS	14/03/2016	06/05/2016	N/A
Add CPV categories  Add ProClass categories	Independent Advocacy Services in Cambridgeshire and Peterborough	LGSS	23/03/2016	02/05/2016	£7,535,969.00
<ul> <li>Regions</li> </ul>	Intelligent Transport Systems, Framework Agreement	LGSS	05/04/2016	05/05/2016	N/A
-	LGSS Occupational Health	LGSS	08/04/2016	10/05/2016	N/A
There are 0 regions selected  Add new region	Local Voluntary and Community Sector Infrastructure Support in Cambridgeshire	LGSS	05/04/2016	16/05/2016	£371,772.00
<ul> <li>Keywords</li> </ul>	1 2 Next >				

- Click on the title you are interested in and then the 'Register interest in this opportunity' button.
- The register interest button will then be greyed out and you will need to click on 'My Activities' along the top ribbon and then filter by 'LGSS' by clicking 'Update'.
- This will allow you to then access the project, the online questionnaire (if applicable) and any associated attachments.

### **Drafting and Submitting a Response**

- Log in (if not already logged in) again and click 'My Activities' from the home page
- On the next page, choose 'LGSS' from the dropdown list and then click the opportunity you are interested in.
- 'Opening' or 'starting' the event will present you with a screen that gives you general information about the opportunity such as closing date / time, description and any associated attachments including the terms and conditions. It also provides you with a number of online questions you have to complete.

Activity : Test			<u>&lt; Back to home pag</u>
Events			<b>V</b> LGSS
<u>Test</u>	Complete	<u>View details   Open</u>	Reinstate this activity
Test	Draft (Respond by: 16/06/2016)	<u>Hide details   Open</u>	Messaging
Activity type: Reference: Respond by:	Request for information 157323 16 June 2016 at 16:00		You have 0 unread message(s). View messages
Response status:	Version 1 - Draft		Audit history
			View audit history

## **C**LGSS

#### Time remaining LGSS - ITT 5200861 8 52 0 37 ✓ Main details Days Hours Minutes Seconds Title: Test Respond by: 29 April 2016 22:00:00 Description: Test Messaging Attachments You have 0 unread message(s). View messages Public attachments can be viewed by all procurers and suppliers involved in this rfx Response controls Terminology - Procurement.docx 12 KB Start my response Register intent to respond Evaluation criteria/question sets No longer wish to respond Questions ← My responses Title Mandatory Online Internal You have not yet started your response. Test Questionnaire 5 5 0

- You have the option of informing the buyer of your intent to respond or you can also opt out if you wish. The system will still allow you to opt back • in at any time.
- Click 'Start My Response' to then begin answering the questions.
- The response wizard is made up of 4 stages: •

• Details

- Additional Information
- Question Sets
- Attachments

### **Details**

### Create ITT response

1 Details 2 Additional information 3 Question sets 4 Attachments					
Response reference: 1671513					
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					

• This screen just gives you an overview of the 'ITT response wizard'. When you have read this, click 'Continue'.

### Additional Information

### Create ITT response

Details 2 Additional information 3 Question sets 4 Attachments	
Supplier reference (optional)	
Response information (optional) 🥹	
Additional comments (optional) 🕡	
Continue Reset Cancel Back	

- The next screen allows you to input further details including a supplier reference, but all of these fields are non-mandatory.
- Once finished, click on 'Continue'.

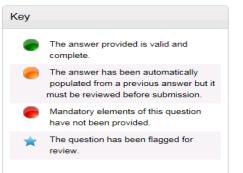
### **Question Sets**

• Clicking on 'Question sets' will then allow you to start to view and answer the online questionnaire. Clicking 'Edit response' underneath the 'Action' will then provide you with an overview of the questionnaire.

## Create ITT response

Details     Additional information	3 Question sets 4 Attachme	ents
Title	Action	Progress
QUESTIONNAIRE	Edit response	
Continue Reset Cancel Back		

• You will also see a helpful key that has been included on the right hand side of the page to assist you, including an ability to flag any questions you wish to review when composing your response.



### NOTE:

- All mandatory questions must be answered.
- $\,\circ\,$  All non-mandatory questions must have been opened and read.
- $\circ$  The questions in green show you which ones you have responded to.
- You will also see a progress bar that shows you the status of your response and will start to fill up with green bars once you answer the questions.

Progre	SS				

• You will then see an overview of all the questions and can begin responding to them by clicking on 'Answer question'

CONTRACT 1	Incomplete s	ection	Section weight: 0.00%
Name of customer organisation	0.00%	Answer questio	n 🔴
Point of contact in customer organisation. Position in the organisation. E-mail address	0.00%	Answer questio	n 🔵
Contract start date. Contract completion date. Estimated Contract Value	0.00%	Answer questio	n 🔵
In no more than 500 words, please provide a brief description of the contract delivered including evidence as to your technical capability in this market.	0.00%	Answer questio	n 🔵

• As you answer each question, you can click 'Save & Next' so that your response is saved and you can answer the next question

• When you click on a question to answer the format of the screen will look similar to this:

#### SUITABILITY QUESTIONS (PASS / FAIL) - INSURANCE | Question 1 of 1

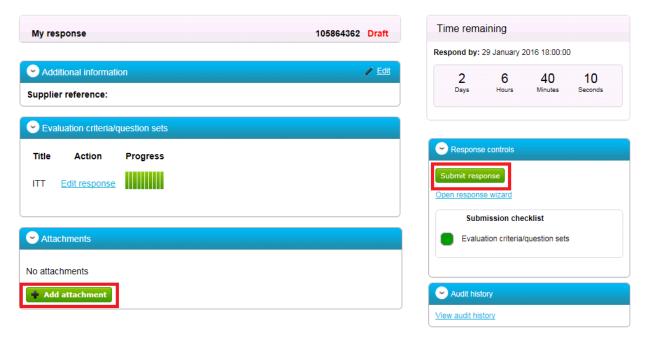
Question	Weight		
Please self-certify whether you already have, or can commit to obtain, prior to the commencement of the contract, the levels of insurance cover indicated below:	0.00 %		
Employer's (Compulsory) Liability Insurance = £5,000,000 Public Liability Insurance = £10,000,000 Professional Indemnity Insurance = £5,000,000 Product Liability Insurance = £5,000,000 * It is a legal requirement that all companies hold Employer's (Compulsory) Liability Insurance of £5 million as a	Help		
minimum. Please note this requirement is not applicable to Sole Traders.	This question is mandatory Potential Providers who answer 'No' will be		
Answer Flag question for review	eliminated from this procurement process.		
Yes  No  O	Question attachments		
Save and close Save and previous Save and next	No attachments		

- This screen will detail the question, any description beneath, any supplier help, weighting and question attachments. It will also tell you whether the question is mandatory or not.
- There will be an answer field displaying either: a multiple choice selection (e.g. yes / no), the ability to select multiple answers from a drop down list, provide a text response or upload an attachment.
- You can also flag the question for review by selecting the square box.
- Continually do this to work your way through the questions, clicking 'Save and next' as you go.
- When you want to stop, click 'Save and Close'.
- The progress bar will now show you the progress made in completing your response. You can go back to this later and carry on.
- Once all questions have been answered, the progress bar will be full and the questions displayed in green.

### View evaluation questions

uestions				
itle	Weight: %	Section status	Status	Flag
1 Quality	Complete see	ction Section	on weight: 6	0.00%
1.1 Please tell us how the different modules interlink?	50.00%	Answer question 🖉	۲	
1.2 How user friendly is the system?	10.00%	Answer question		
1.3 Please explain how the system will be	30.00%	Answer question 🖉		
used? 1.4 Tell us why you should be given this contract?	10.00%	Answer question 🏼	•	
2 Price	Complete see	ction Section	on weight: 4	0.00%
2.1 Please upload your completed pricing schedule here	100.00%	Answer question 🏼		

- Click the 'Back' button to return to the main screen then click 'Continue'.
- You will be able to add any additional attachments here (if required) as well using the 'add attachment' button. Once you have done this, click 'Finish'
- Your draft response will then be assigned a unique reference number below.



- Once you are happy your response is complete, if you then click the 'Submit response' button. You will then receive an email to confirm that your submission has been received.
- If you want to edit your response before the deadline, go back to the home screen and click on the contract reference number again, you will then see a button to edit your response.



• Click 'Log Out' when finished.

### **Contacting the Buyer**

- All communications with the buyer <u>must</u> be sent through the ProContract messaging system
- For technical / navigational queries about the system, you may use the electronic ticket logging system which can be found <u>here</u>. Remember to include as much detail as possible, label your message as "Urgent" (only if time-sensitive) and include your telephone contact information.
- Alternatively you may contact ProContract by telephone on 0330 005 0352 (9am 5:30pm Mon to Fri) or by email to <u>ProContractSuppliers@proactis.com</u>
- To send a message / clarification question to the buyer regarding the opportunity you are responding to, firstly click on 'View Messages'.
- Click 'Create New Message', entering details of your message (including any attachments) and click 'send message'.

To:	Project team	
Subject:		
Attachments:	9	

• When a response is sent to your message, you will be notified by <u>ProContract-Notifications@due-north.com</u> and will access the 'View Messages' area to view these.