



## SUPPLIER GUIDE

FOR

RESPONDING TO TENDERS (USING  
ATTACHMENTS) WITHIN  
PROCONTRACT

## Contents

Viewing the Exercise Details/Documents .....	4
Attachments, Messages .....	6
Completing the Response (using attachments) .....	8
The Response Wizard .....	8
Uploading Attachment .....	10
Submitting The Tender Response .....	11
Editing Tender Response and Resubmission .....	12
Portal Technical Support .....	13

## **Responding to RFQ/PQQ/ITT's (using attachments)**

When the RFQ/PQQ/Tender is published an e mail will be sent by the system to inform you of this and that the exercise can now be viewed and worked on. The following section of the user guide will take you through the RFQ/PQQ/Tender response process.

**Note:** While this guide covers the attachment of an ITT response, it remains the same for the return of a PQQ or RFQ, it is just the specific wording that will change, the functionality will not. **Online Evaluations are covered in a separate User Guide/Help Section.**

## Viewing the Exercise Details/Documents

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

The screenshot shows the 'Home page' of a system. At the top, there is a navigation bar with 'Home', 'All opportunities' (dropdown), a search box, and a 'Go' button. Below this, the 'Home page' title is followed by four main sections:

- Activities:** A section with tabs for 'Active', 'Recently added', and 'Last viewed'. A dropdown menu is open, showing options: '-- Please select --' and 'ESPO'. A red circle highlights the dropdown menu. Below the dropdown is a search box and a 'Go' button. A message below the search box says: 'Please select a buyer from the dropdown and click on the 'Go' button'.
- Company details summary:** A section for 'ESPO' with address 'Barnsdale Way, Grove Park, Enderby, Leicester, Leicestershire, LE19 1ES', a description 'Local Authority Purchasing & Supply Consortium', and keywords 'Procurement, supplies, framework, contract, distributor, stock'. There is an 'Edit' link.
- Opportunities:** A section with a 'Find opportunities' link and a message: 'To search and view all of the latest opportunities available on the Due North portal, please click on the 'Find opportunities' link above'.
- Workgroups:** A section with a message: 'Activities are assigned to workgroups allowing all contacts within a workgroup to work on the activities together'. It lists workgroups: 'Commercial Team (1)', 'People & Communities (1)', and 'Education (1)', each with a 'Request merge' link. There is an 'Add new workgroup' button.

From the drop down menu select the organisation which advertised the opportunity. 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), a 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 ITT will be referred to at various points. If you are completing a PQQ or Quotation (using attachments) then the screens will remain the same, it is only the terminology that will change. Online responses to online evaluations are covered in a separate guide/help section.

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 upon 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, in this instance 'Example ITT'.



**Events**

[Example ITT](#) Not started (Respond by: 20/09/2016) [Hide details](#) | [Start](#)

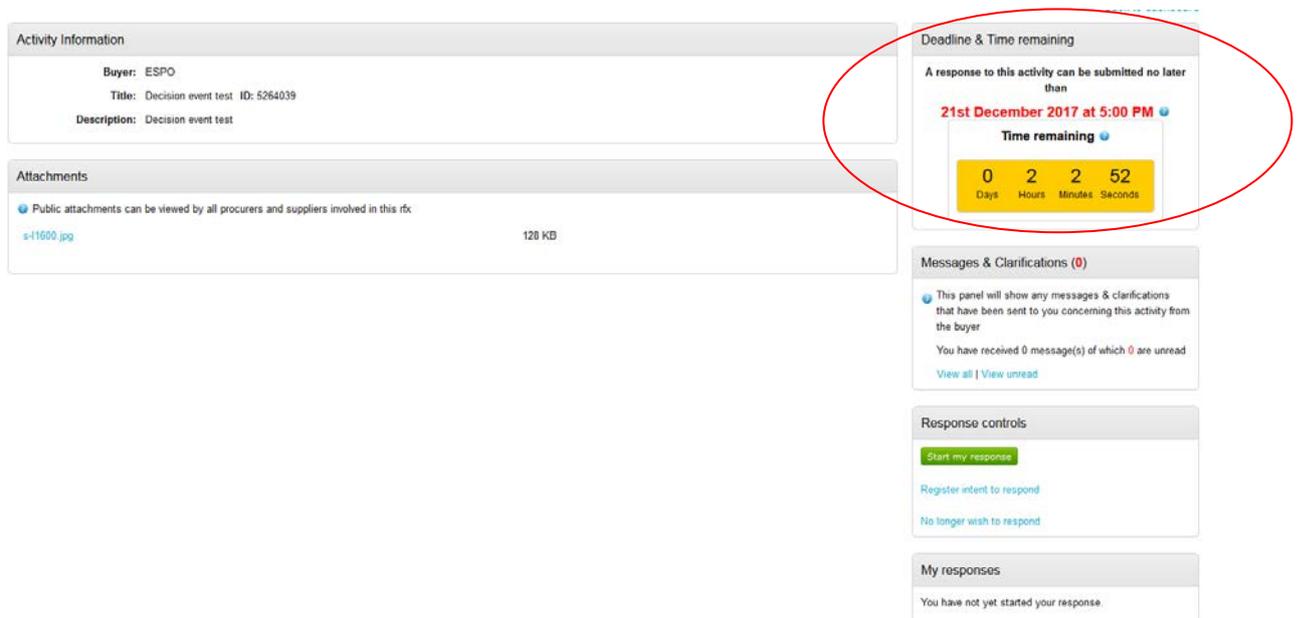
**Activity type:** ITT  
**Reference:** 5236009  
**Respond by:** 20 September 2016 at 15:30  
**Response status:** Not started

[Archive this activity](#)

**Messaging**  
 You have 0 unread message(s).  
[View messages](#)

**Audit history**  
[View audit history](#)

This will open the tender screen. This is broken up into different sections; Additional Information and Attachments and Messaging. **Note:** There is also a **countdown timer** in the top right indicating the time left until the submission deadline.



**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.  
 s=1600.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 2 Hours 2 Minutes 52 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](#)

**My responses**

You have not yet started your response.

The different sections are explained below;

## Main details

This section shows the title, description and date and time the completed tender must be returned by.

## Attachments

This section shows the attachments that have been published by the organisation. To download these click on the title of the attachment.

**Note:** There may be no attachments here, however in the majority of cases there will be. Where there are documents, they should be **downloaded and saved** to your own network or desktop before working on them.

## Messages

During the process all questions should be raised using the portal. The ability to ask questions/send messages is found in the Messaging section. Anything sent through this area will go to the member of staff that is working on this 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

--Actions-- **Go**

Ref No	Subject	From	Date	
<input type="checkbox"/> 1.1	<a href="#">Additional Info</a>	Project team	12/03/2015 15:40	

**Create new message**

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: Branding

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 '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  
dd/mm/yyyy dd/mm/yyyy

Refresh Update

Inbox

Create new message Export Messages

--Actions-- Go

Ref No	Subject	From	To	Date	Public
1.1	<a href="#">xxx</a>	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.

Inbox

Create new message Export Messages

--Actions-- Go

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

## Completing the Response (using attachments)

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

The screenshot displays a tender summary interface with several sections:

- Activity Information:** Buyer: ESPO, Title: Decision event test ID: 5264039, Description: Decision event test.
- Attachments:** A public attachment named 's-11600.jpg' (128 KB) is listed.
- Deadline & Time remaining:** A response must be submitted no later than 21st December 2017 at 5:00 PM. A timer shows 0 days, 2 hours, 2 minutes, and 52 seconds remaining.
- Messages & Clarifications (0):** A panel for messages and clarifications from the buyer, currently showing 0 unread messages.
- Response controls:** A section with three buttons: 'Start my response' (highlighted with a red circle), 'Register intent to respond', and 'No longer wish to respond'.
- My responses:** A section indicating that the user has not yet started their response.

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

The screenshot shows the 'Create ITT response' wizard at Stage 1: Details. The interface includes a progress bar with three steps: 1 Details, 2 Additional information, and 3 Attachments. The main content area contains the following text:

**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.

At the bottom, there are three buttons: 'Continue' (highlighted in green), 'Reset', and '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

Details 2 Additional information 3 Attachments

Supplier reference (optional) ⓘ

Response information (optional) ⓘ

Additional comments (optional) ⓘ

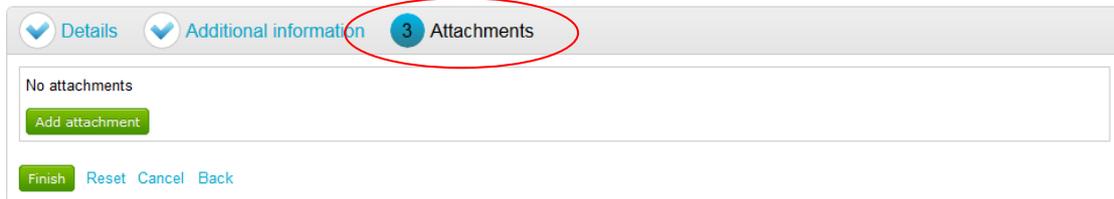
[Continue](#) [Reset](#) [Cancel](#) [Back](#)

## Uploading Attachments

The next stage allows you to upload your relevant tender attachments.

**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



To add an attachment click  .

You can now browse your computer for the attachments using the file uploader (see below). You can add as many attachments as you like.



When uploaded, you can view an attachment by clicking its name, to remove the attachment click the red cross icon. When all required attachments have been added, click on the “Next” button to proceed to the next screen.



[ITT Attachment.docx](#)

When complete click “Continue” to move onto the next page, “Reset” to begin the wizard again and remove all info, “Cancel” to leave the wizard completely (without saving) or “Back” to return to the previous stage.

## Submitting The Tender Response

When all information is added you can submit the response by clicking **Submit response**. You will be required to confirm this by clicking Submit response for a second time.

The screenshot displays a web interface for submitting a tender response. On the left, there are three main sections: 'My response' with ID 108208119 and status 'Draft'; 'Additional information' with a 'Supplier reference:' field and an 'Edit' button; and 'Attachments' showing a file 's-11600.jpg' (128 KB) with a red 'x' icon and an 'Add attachment' button. On the right, there are three sections: 'Deadline & Time remaining' with a '<a href="#">Back to summary</a>' link, a warning that the response must be submitted by '21st December 2017 at 5:00 PM', and a 'Time remaining' counter showing 0 Days, 1 Hour, 43 Minutes, and 23 Seconds; 'Response controls' with a 'Submit response' button circled in red, an 'Open response wizard' link, and a 'Submission checklist' showing 'Attachments' with a green checkmark; and 'Audit history' with a 'View audit history' link.

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.)

This is a close-up of the 'Submission checklist' section. It features the title 'Submission checklist' and a single item 'Attachments' which is marked with a green square, indicating it has been successfully checked.

**Note:** Please make sure that you submitted the latest version of the tender package. You should be notified about any amendments to the tender package via email and/or through the messaging section.

## 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 sections:

- 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**. A timer shows 0 Days, 1 Hour, 42 Minutes, and 26 Seconds remaining. A green 'Submitted' button is visible.
- 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. Links: View all | View unread.
- Response controls:** A red circle highlights the link 'I would like to edit my response'. Another link 'No longer wish to respond' is also present.
- My responses:** A table showing one response: Version 1, Submitted, 21/12/2017 15:17:05.

When this is clicked it will create a draft version 2.

The screenshot shows a button labeled 'My response' with the number '26' and the word 'Draft' in red text.

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**

<Back to summary

My response **108208120 Draft**

Additional information **Edit**

Supplier reference:

Attachments

s-11600.jpg 128 KB

**Add attachment**

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 41 Minutes 23 Seconds

Response controls

**Submit response**

Open response wizard

Submission checklist

Attachments

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](mailto: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 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 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).