



## Appendix A ProContract User Guide

**Please note this document is current  
as at 01 June 2019**

**For further information refer to the  
ProContract on-line guidance**

# Registering on ProContract

## How to Register

On the portal home page there is a link to **Register** (for free) on the right hand side of the screen, as shown below.

Click this link to begin the step-by-step registration wizard, where you will be required to enter your company details.

Home page

The screenshot shows the ProContract portal home page. It features several sections:

- News and announcements:** Includes two news items: "Tories plan 'extreme cuts' - Labour" and "Cameron pledges 500 new free schools".
- Current opportunities:** A table listing opportunities with columns for Buyer, Title, StartDate, EndDate, and Estimated Value. One opportunity is listed for Cheshire with a value of £5,000,000.00.
- New to portal:** A section titled "List of benefits" listing advantages like real-time feedback and local currencies. It includes "Free registration" buttons for "Register" and "Login", and a link for "Forgotten your username or password?".
- Useful links:** A section with a link to "Contracts register".

## Requirements

This page is an introduction to the process that you will be taken through in order to complete your registration on the portal. Please read this text carefully before proceeding through this process.

**Minimum and recommended system requirements** can also be viewed here. If you wish to proceed, click **Continue** from the options at the bottom of the page, or if you want to abort the registration process click **Cancel**.

Register

The screenshot shows the registration wizard progress bar with steps 1 through 7: Requirements, Contact info, Company info, Description, Opportunities, T&Cs, and Confirmation. Step 1, Requirements, is currently active. Below the progress bar, the text reads:

Welcome to the supplier registration wizard. The wizard will assist you with the completion of your registration.

Once you have confirmed your details and submitted your registration you will receive an email receipt.

Your submission will then be validated by the supplier approver and once approved you will be issued with a username and password to access the site.

> [Minimum and recommended system requirements](#)

Buttons for "Continue" and "Cancel" are visible at the bottom.

## Contact Information

At this stage of the registration process you need to enter your own contact details, a username, a password, and a memorable word/hint. These details will be used when logging into the system. You will be the primary account holder for this company (although details can be changed post registration) so this account will be able to modify the details for the company and add more accounts (which is detailed in another guide).

Register

Requirements 2 Contact info 3 Company info 4 Description 5 Opportunities 6 T&Cs 7 Confirmation


We require all this information to create your account unless marked as optional.

Title First name Last name

Job title Department ?

### Contact Information

In this section your contact information is entered along with your job details. Complete all mandatory fields as required.

**Note:** Further help regarding the fields can be found in the by hovering over the  icon.

**Department** - This will form your work group. All future members of this work group will be able to access events you are involved in.

**E-mail** - This is the e-mail address that messages will be sent to confirming registration details, and all other system communication that may take place during the tender process (including notifications of new tender opportunities). It is recommended in most instances that a **GENERIC EMAIL ADDRESS** is used, so that communication will not be lost if that person is away or leaves their position (i.e. to a sales@... or tenders@... address possible.) Also this must be of standard email format e.g. name@company.com

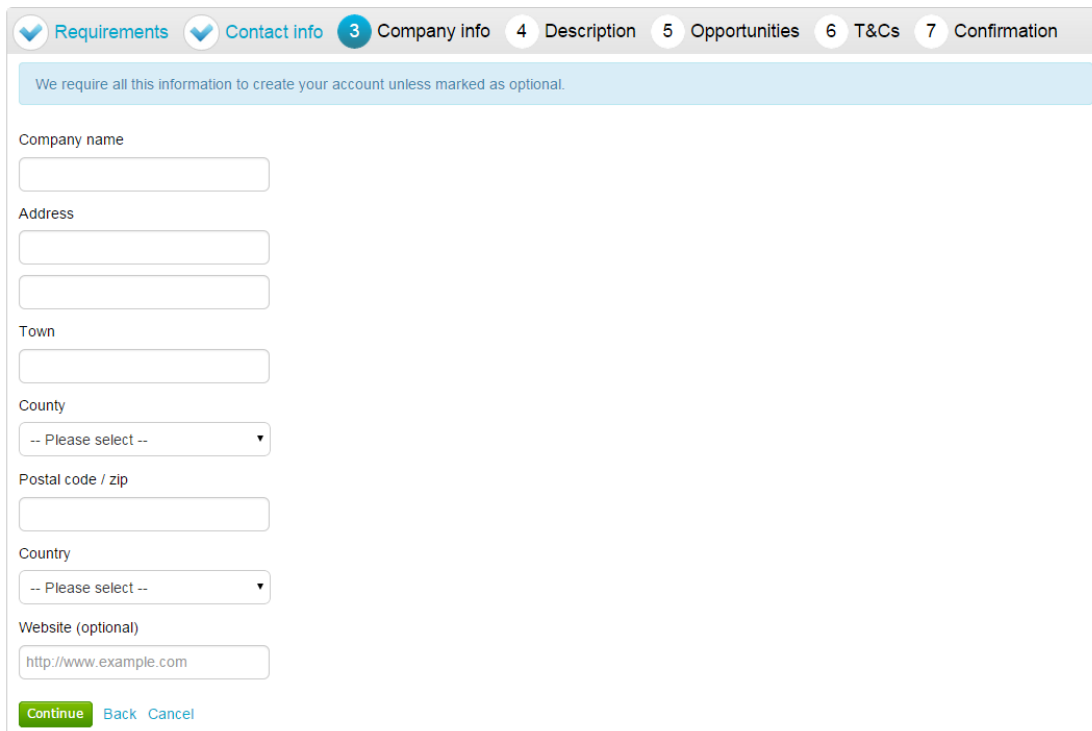
### Security Information

The second part of this stage is dedicated to setting up your security information. This is where you are asked to specify a password, a memorable word and a hint to help you in case you forget it. This must be something that is secure and also that is **memorable** to you.

When the details have been completed then please click on the **Continue** button to proceed, the **Back** button to go back to the previous stage, or the **Cancel** button to cancel the registration.

## Company Information

In this section you will need to populate details regarding the company you work for/are registering on behalf of, as shown below.

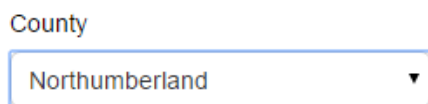


You are required to enter the name of the company you work for and location details.

If any of the fields do not apply but are mandatory, such as “Postcode/ZIP” for companies based outside of the United Kingdom, by entering “**N/A**” here you can still proceed.

**Note:** Some of the fields (County and Country) are chosen by using a dropdown menu. To select a County/State click the arrow to the right of the box to reveal a drop down menu containing all the possibilities that can be chosen.

From the list select the required option by clicking on its name and this will populate the field as required.



If United Kingdom is selected, then fields will appear requiring Registration number and VAT number.

When the details are complete then please click on the **Continue** button to proceed, the **Back** button to go back to the previous stage, or the **Cancel** button to cancel the registration.

## Description

The first part of this stage requires a Company description and up to 6 keywords. Here more information on the company is entered to help the contracting organisation understand what it is your company does. The description helps promote your company to potential buyers, while the keywords can improve the 'searchability' of your company.

**Note:** A description and at least one keyword are required in this section. This is free text and as much information as required can be entered here.

It is important that you complete this information as the procuring organisations can search for a company based on the description or keywords specified.

The screenshot shows a multi-step registration process with tabs for Requirements, Contact info, Company info, Description (active), Opportunities, T&Cs, and Confirmation. A blue banner states: "We require all this information to create your account unless marked as optional." Below this, the "Company description" section has a text area with the prompt "Promote your company to potential buyers." and the example text "E-Sourcing / Procurement software providers". The "Company keywords" section has the prompt "Improve your company's searchability by entering a number of keywords." and four numbered input fields. The first field contains "Saas", and the others are empty.

## Number of Employees/Classifications

Enter your best estimate as to the number of employees in your organisation within the *Number of employees* field.

### Number of employees

*Please provide your best estimate as to the number of employees in your organisation*

The final section is the *Classifications* section. This is where the supplier can highlight the classifications that the company belongs to (which is used for reporting purposes only). To select a classification hover over the relevant box and left click on the mouse to mark the box to the left with a tick. You can highlight as many that apply to your organisation.

**Note:** The first batch of classifications are mandatory and at least one must be selected from the list.

## Classifications

Please check all that apply. This information is used for reporting purposes only.

Legal Status of Organisation

- Charitable Incorporated Organisation (CIO)
- Community Interest Company (CIC)
- General Partnership
- Industrial & Provident Society
- Limited Liability Partnership (LLP)
- Limited Partnership
- Private Company Limited by Guarantee (LTD)
- Private Limited Company (LTD)
- Public Limited Company (PLC)
- Sole Trader
- Unlimited Company
- Other

**Note:** The second batch of classifications are optional, and are selected in the same way as described above.

Further Organisation Detail (optional)

- Public sector organisation
- Charity
- Black and Minority Ethnic (BME) organisation
- A company owned and managed by women
- Social Enterprise (SE)
- Franchise
- Voluntary Community Sector (VCS)

When the details are complete then please click on the **Continue** button to proceed, the **Back** button to go back to the previous stage, or the **Cancel** button to cancel the registration.

## Opportunities - Category/Region Selection

This is the category and region selection stage of the supplier registration, which will look as shown below.

To select your chosen categories click the **Select Categories** button.

Categories

*Have opportunities in the following categories emailed to you.*

[Select categories](#)

### Categories List

This section is where you can register your company to receive automatic e-mail notifications of new opportunities that have been published that may be of interest to

your company. This will greatly assist you when using the portal and means that relevant opportunities are not missed. At least one category must be selected.

### Category selection

The screenshot shows a user interface for category selection. At the top is a grey header with the text 'Search categories'. Below this is a search bar containing the placeholder text 'Enter the search criteria...'. To the right of the search bar is a green 'Search' button. Further right are two radio buttons: 'Exact match' (which is selected) and 'Fuzzy search'. Below the search bar is another grey header with the text 'Categories list'. Underneath is a list of four categories, each with a blue diamond icon to its left and a checkbox to its right. The categories are: '01000000 - Food', '02000000 - Supply Chain', '03000000 - Supplies and Services', and '04000000 - Drink'. All checkboxes are currently unchecked.

**Category:** The top level categories that you can register to receive updates under are all listed.

To select a top level category, mark the box to the left of the category by clicking it. You can select multiple categories if required. Ensure that you click on **Select Categories** to add this to the list.

If you are not sure, or if you want to put your company against lower level classifications, you may use the search facility at the top of the page to search for specific words to help you narrow down the categories to add to your account.

This can also be done by clicking on the blue diamond to the left of the category which will take you down to the next level. This can then be repeated to go down further levels in some categories.

**Note:** When selecting categories, only categories relevant to the goods or services you can offer as a supplier should be selected. Category selection can be revisited at anytime to carry out required amendments, and searches of advertised opportunities for all categories can also be carried out at anytime.

This screenshot shows the same 'Search categories' and 'Categories list' interface as the previous one. The search bar and buttons are identical. The 'Categories list' section shows a more detailed tree structure. The top level categories are '01000000 - Food', '02000000 - Supply Chain', and '03000000 - Supplies and Services'. Under '02000000 - Supply Chain', there are two sub-level categories: '02010000 - Waste' and '02020000 - Energy'. Under '02020000 - Energy', there are two more sub-level categories: '02020100 - Utilities' and '02020200 - Equipment'. The checkboxes for '02000000 - Supply Chain' and '02020200 - Equipment' are checked, while all other checkboxes are unchecked. A vertical scrollbar is visible on the right side of the categories list.

When all required categories have been chosen, click **Select Categories** from the options at the bottom of the page.


Requirements Contact info Company info 4 Description 5 Opportunities 6 T&Cs 7 Confirmation

Please correct the 2 errors on the form to continue

We require all this information to create your account unless marked as optional.

Categories  
Have opportunities in the following categories emailed to you.  
02020200 - Equipment  
Please select at least one category.  
Select categories

Selected categories are now shown as above.

**Note:** If a category has been added in error this can be removed by clicking the  button.

## Regions

At least one *Region* must now be selected. These will limit the opportunities that you are emailed to only regions that you supply to. Regions are selected in the same way as categories.

Register

Requirements  
We require all the information to create your account unless marked as optional.

Categories  
Have opportunities in the following categories emailed to you.  
02020200 - Equipment  
Select categories

Regions  
Limit opportunities to only regions that you supply to.  
Select regions  
Continue Back

Region selection

Search regions

Enter the search criteria... Search Exact match Fuzzy search

Regions list

- UK - UNITED KINGDOM
  - UKC - NORTH EAST (ENGLAND)
    - UKC1 - Tees Valley and Durham
    - UKC2 - Northumberland and Tyne and Wear
  - UKD - NORTH WEST (ENGLAND)
  - UKE - YORKSHIRE AND THE HUMBER
  - UKF - EAST MIDLANDS (ENGLAND)
  - UKG - WEST MIDLANDS (ENGLAND)

Selected regions

UKC2 - Northumberland and Tyne and Wear

Select regions Remove all Cancel

## Additional Classifications/Categories

Also further lists/categories may now also be found (if the procuring organisation/portal have used these). This allows you to register against further supplier lists, as set up by the procuring organisation(s) to allow you to be further categorised and found more easily by procurers.

**Note:** This is totally independent of the Contract Category Interest that is chosen and this will NOT generate any email notifications.



Each list will show up with the title, followed by a classification structure, which you can register your company against. Tick the options that are applicable from this list, this may be done for several lists.

When the details are complete then please click on the **Continue** button to proceed, the **Back** button to go back to the previous stage, or the **Cancel** button to cancel the registration.

## T&C's and Privacy Policy

This is the step where you will be asked to agree to the Terms and Conditions of using the system, and also the privacy policy as laid out by Due North.

Register

The screenshot shows a registration progress bar at the top with steps: Requirements, Contact info, Company info, Description, Opportunities, T&Cs (active), and Confirmation. Below the progress bar, there are two scrollable text areas. The first is titled 'Due north terms and conditions' and contains text about 'Due North Limited', 'Terms and Conditions of use', 'Acceptance of Terms', 'International Use', and a checkbox for agreement. The second is titled 'Privacy policy' and contains text about 'Due North Limited', 'This document should be read in conjunction with the Terms and Conditions shown on this site.', and 'Privacy'. At the bottom of the form, there is a checked checkbox 'You must agree to all conditions to continue' and three buttons: 'Continue' (green), 'Back', and 'Cancel'.

To agree with Due North Ltd's Terms and Conditions and Privacy Policy tick the box placed at the bottom of the page.

When the box is ticked click on the **Continue** button to proceed, the **Back** button to go back to the previous stage, or the **Cancel** button to cancel the registration.

## Confirmation Page

The final screen will be a summary of the details that have already been entered into the system, that need to be checked before completion of registration.

If you are unhappy or would like to change any of the information in the sections then this can be done by clicking on the **relevant stage title** along the top of the page.

## Register

Requirements	Contact info	Company info	Description	Opportunities	T&Cs	7 Confirmation
Name	Mr Chris Cox					
Job title	Support					
Department	Support					
Telephone	01670597120					
Fax						
Mobile						
User name	chris.cox					
Email	chris.cox@due-north.com					
Company name	Cox & Clifton					
Address	1 DN Support, Support Town, Northumberland, NE23 1LZ United Kingdom					
URL						
Registration number	123456					
VAT number	VAT1234					
Company description	Support					
Keywords	Support					
Number of employees	10					
Legal Status of Organisation	Private Limited Company (LTD)					
Further Organisation Detail						
Categories	02020200 - Equipment					
Regions	UKC2 - Northumberland and Tyne and Wear					
Public lists						

## Submitting your Registration

Once you are happy that all details are complete and correct the Registration needs to be submitted.

Regions	UKC2 - Northumberland and Tyne and Wear
Public lists	
<a href="#">Submit registration</a>	<a href="#">Back</a> <a href="#">Cancel</a>

When you are happy that all the information is complete and correct, click **Submit Registration** at the bottom of the screen. Click the **Back** button to go back to the previous stage, or the **Cancel** button to cancel the registration.

This will show the Supplier Registration Confirmation page as shown below.

## Thank You

Thank you for registering your details. Your registration will be assessed and you will be notified of the outcome in due course.

[Continue](#)

The system will then send a confirmation e-mail to say the application is being considered. The email will also contain an application reference number for your own records.

Click **Continue** to return to the supplier portal.

When the registration is accepted then you will receive an email containing a reminder of your username and the link to access the opportunity portal.

# Registering an Interest

## Contract Opportunities

Contract Opportunities are posted by buying organisations to notify you of their up and coming contracts and to give suppliers a chance to express their interest in the opportunity and to receive the relevant documents.

The opportunities area will also show a list of **suggested opportunities**, based on the Categories and Regions selected in your profile.

The screenshot displays the user interface for 'Contract Opportunities'. At the top, there is a news snippet: 'The number of free schools in England will more than double to over 500 by 2020, if the Conservatives are re-elected, David Cameron has promised.' Below this is the 'Activities' section, which includes tabs for 'Active activities', 'Archived activities', and 'Last viewed activities'. A search bar is present with a dropdown menu set to 'All buyers' and a 'Go' button. A message below the search bar states 'Your criteria returned no results'. The 'Opportunities' section follows, with a heading 'Suggested Opportunities' and a message 'No matching records found'. On the right side, there are two panels: 'Keywords' with a 'Support' link, and 'Workgroups' with a description, a 'Support (1)' link, and an 'Add new workgroup' button.

## Searching Opportunities

To search for new opportunities from the supplier home page click on **Find Opportunities** located across the top of the page.

The screenshot shows the top navigation bar of the ProContract system. It includes links for 'Home', 'Find opportunities', and 'My activities'. On the right side of the bar, the user's name 'Chris Cox' is displayed along with 'Your account' and 'Logout' links. Below the navigation bar, there is a search area with a dropdown menu set to 'All opportunities', a search input field, and a 'Go' button. The text 'Home page' is visible below the search area.

This will then open the Opportunities screen which includes a full list of all current opportunities. You can specify search criteria to **narrow your results** in the left hand panel, or just do a key word search (on Title, Buyer or All Data) within the **Search** area in the top right of the page.

## Opportunities

**Narrow your results**

▼ Portals

All

North West Portal

▼ Categories

There are 0 categories selected

[+ Add new category](#)

▼ Regions

There are 0 regions selected

[+ Add new region](#)

▼ Include Closed

Yes  No

▼ Interest Date

Start date

End date

[Update](#)

Opportunities

Title	Buyer	Expression Start	Expression End	Estimated Value
<a href="#">(a) Accommodation for Service User(s)</a>	Cheshire	05/02/2015	04/02/2019	£5,000,000.00

**Narrow your results on:**

**Portals:** This setting allows the Portal you are searching on to be chosen.

**Categories:** This field allows you to choose the category classification to which the opportunities you wish to search for are associated. To select a category, click on the *Add new category* and search for the relevant entry.

**Regions:** This field allows you to choose the region to which the opportunities you wish to search for are associated. To select a region, click on the *Add new region* and search for the relevant entry.

**Include Closed:** This defaults to No which will show only opportunities that you can currently express your interest in - so the expression of interest window is open. To view all current opportunities, and also all past and future opportunities that are on the portal but have closed, mark Yes.

**Interest Date:** Refine your results based on the Expression of Interest date.

Once the search has been set up in the desired way then click on Update and the opportunity results in the middle of the page will refresh.

To view the further details of the opportunity, click the corresponding **title**.

Opportunities

Title	Buyer	Expression Start	Expression End	Estimated Value
<a href="#">(a) Accommodation for Service User(s)</a>	Cheshire	05/02/2015	04/02/2019	£5,000,000.00

The opportunity details will look as shown, with all the relevant opportunity/contract details.

## (a) Accommodation for Service User(s)

[Return to find opportunities](#)

[Register interest in this opportunity](#)

### Main contract details

**Title** (a) Accommodation for Service User(s)  
**Categories** 03000000 - Supplies and Services  
**Description** This is for the provision of Accommodation for Service User(s) coming via our Care Brokerage team. We are running this exercise as an Open DPS Framework. This means that as a potential provider you can apply to be added to this framework as anytime throughout it's 4 year duration. If you don't succeed with your first attempt you can try again at a latter stage. Please also find attached a contract overview and a summary of how the DPS works and the advantages for you as the provider.

### Contact details

**Buyer** Cheshire  
**Contact** Buyer One  
**Email** [buyer1@example.com](mailto:buyer1@example.com)  
**Telephone** 56446565  
**Fax** 654546546  
**Address** Enterprise Court  
Cramlington  
Northumberland  
NE23 1LZ  
United Kingdom

### Key dates

#### Estimated contract dates

**Start date** 30/01/2015 **End date** 30/01/2016

#### Expression of interest dates

**Start date** 05/02/2015 08:00:00 **End date** 04/02/2019 08:39:00

#### Current Dynamic Purchasing System (DPS) round information

**End date** 30/01/2016 00:00:00

### Attachments

Public attachments can be viewed by all procurers and suppliers involved in this project

No attachments

## Main Contract Details

This shows key details of the contract including the title, categories and description.

### Key Dates

This section shows the estimated contract dates, the expression of interest dates and any other important information (i.e. Current DPS Round end date, for example.) The expression of interest dates determine the options that will be available regarding the opportunity, as the date must fall within these two dates in order to express an interest.

### Contact Details

This shows details of the Buyer and Main Contact.

### Attachments

Any attachments or links relevant will appear in the bottom right, where they can be viewed/downloaded by clicking on the title.

In the top right there are 2 options – either register an interest in the opportunity, or return to the find opportunities page.

## Registering Interest in an Opportunity

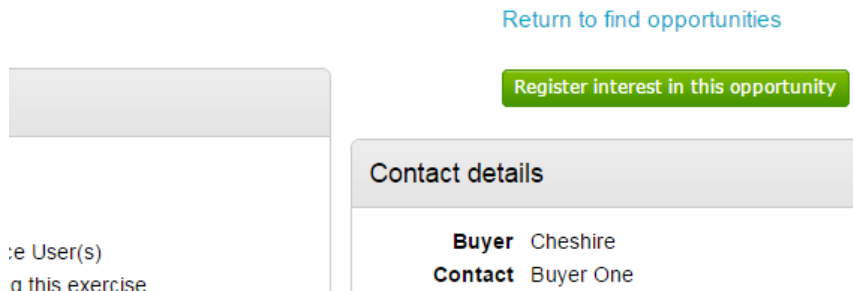
To register interest in a particular opportunity you must be registered on the portal.

*This process is covered in detail in the section [Registering](#)*

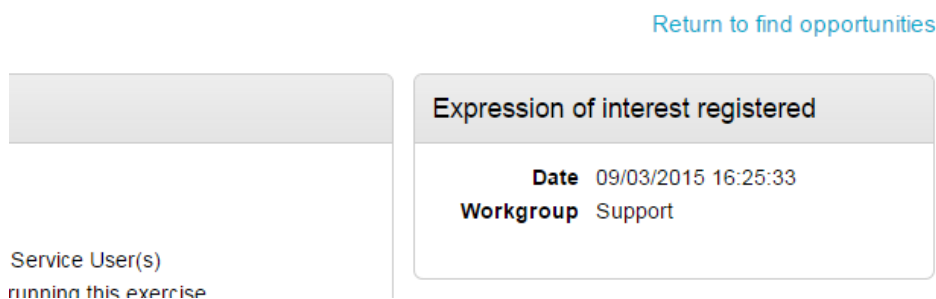
Once registered, you will have a username and password to access the portal. This allows you to register interest in any opportunities that are advertised on the portal.

Once you are logged in, you can find the relevant opportunity using the process in the section [Contract Opportunities](#).

If after viewing the information regarding the opportunity you decide that you are no longer interested in registering an interest then click the *Return to find opportunities* button. If you do decide you would like to express your interest then click on **Register interest in this opportunity**.



The same area will now show **confirmation** of the registered Expression of Interest. Click [Return to find opportunities](#) to start a New Search.



# Submitting a Response

## Viewing the Details/Documents

Login to the system and then it will take you to your homepage.

The screenshot shows the ProContract system homepage. At the top, there is a navigation bar with 'Home' on the left, a dropdown menu for 'All opportunities', a search box, and a 'Go' button. Below the navigation bar, the 'Home page' section is visible. It contains several widgets: 'News and announcements' with two news items, 'Company details summary' for 'Cox & Clifton', 'Activities' with a table of active activities, and 'Workgroups' with a description and an 'Add new workgroup' button.

Home page

News and announcements [View all](#)

**UK surveillance 'lacks transparency'**  
The legal framework surrounding surveillance by MI5, MI6 and GCHQ is "unnecessarily complicated" and "lacks transparency", MPs say. [More](#)

**Farage: I'd axe 'much of' race laws**  
Nigel Farage says UKIP would scrap many laws designed to prevent racial discrimination - but says his comments have been "wilfully misrepresented". [More](#)

Company details summary [Edit](#)

**Cox & Clifton**  
1 DN Support, Support Town, Northumberland, NE23 1LZ

**Description**  
Support

**Keywords**  
Support

Activities [View full screen](#)

Active activities Archived activities Last viewed activities

All buyers [Go](#) Search [Go](#)

Buyer	Title	Current event	Event deadline
★ Cheshire	<a href="#">Example Project</a>	Example ITT	22/04/2015
★ Cheshire	<a href="#">(a) Accommodation for Service User(s)</a>	(a) Accommodation for Service Users	28/01/2016

Workgroups

Activities are assigned to workgroups allowing all contacts within a workgroup to work on the activities together

[Support \(1\)](#)

[Add new workgroup](#)

From here to view 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 have registered with, this can be an ITT (Invitation to Tender), RFQ (Request for Quotation), a PQQ (Pre-Qualification Questionnaire) etc.

**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 **Open Event** within the relevant stage, in this instance 'Example ITT'.

[Home](#) > Example Project

Activity : Example Project

[< Back to home page](#)

Events

[Archive this activity](#)

Example ITT
In Progress

[Hide details](#) | [Open event](#)

**Reference:** 41

**End date:** 22/04/2015

**Start date:** 24/03/2015

**Event status:** In Progress

**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; Main details, Public attachments, Terms & Conditions, Item breakdown and Messaging. **Note:** There is also a **countdown timer** in the top right indicating the time left until the submission deadline.

Cheshire - ITT 41

▼ Main details

**Title:** Example ITT **Respond by:** 03/14/2015 21:30:00

**Description:**  
Example ITT

▼ Public attachments

Public attachments can be viewed by all procurers and suppliers involved in this rfx

[ITT Attachment.docx](#) 12 KB

[Specification & Requirements Document.docx](#) 12 KB

▼ Terms & conditions

[Standard Legal Terms](#)

▼ Item breakdown Export

Item description	Unit of measure	Quantity	Comments
Uniform			
Branded Jumpers (Mens)	per jumper	500	
Branded Cardigan (Womens)	per cardigan	500	

**Time remaining**

2
6
5
28

Days
Hours
Minutes
Seconds

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

▼ 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.

### **Public attachments**


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

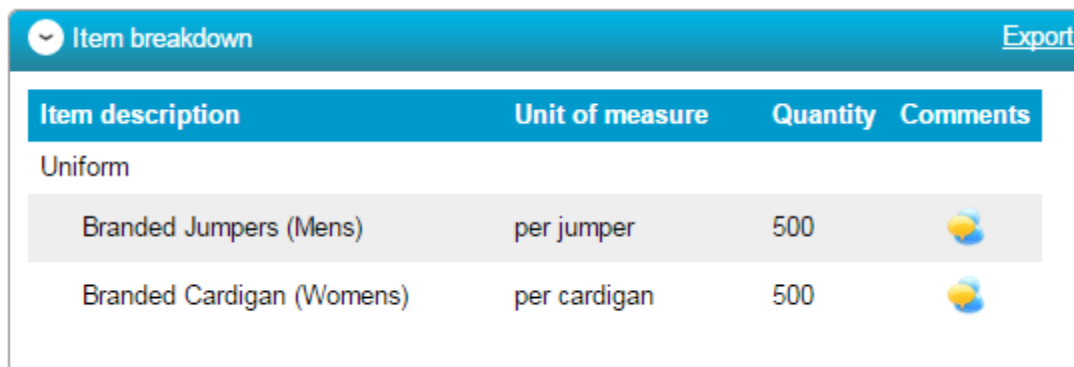
**Note:** There may be no attachments here, however in the majority of cases there will be. Where there are documents, they should be **downloaded and saved** to your own network or desktop before working on them.



### **Item Breakdown**

This section is the item breakdown for the tender used for pricing, if one has been created by the organisation.

**Note:** This is an optional section and there may not be one included with an exercise.

This shows the description of the group/line item, the unit the item is measured in, the quantity of these units required and any additional comments regarding the line item (shown by hovering over the  icon.) An example of one is shown below.



Item description	Unit of measure	Quantity	Comments
Uniform			
Branded Jumpers (Mens)	per jumper	500	
Branded Cardigan (Womens)	per cardigan	500	

This can also be exported if required, by clicking **Export**.

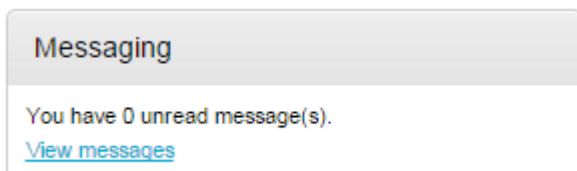
### **Terms and Conditions**

The Terms and conditions section shows the terms that have been used with this tender. To view them click on the Terms & Conditions title, shown in blue. There will be at least one set of terms here and there can be more depending what the procuring organisation have set up.

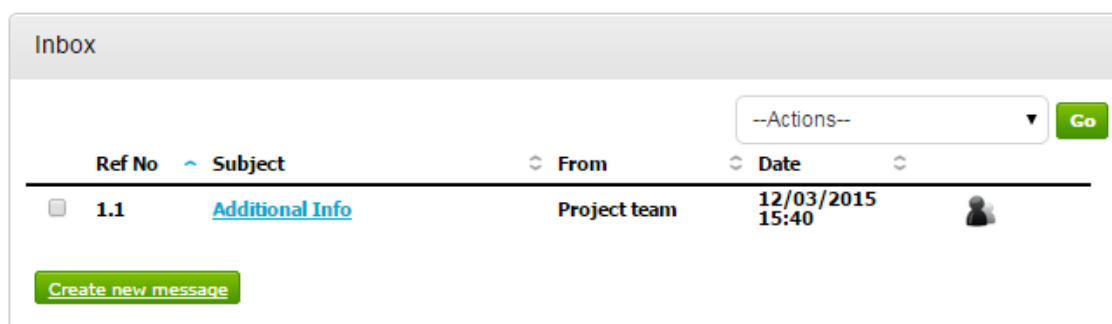


## Messages

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**.



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



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

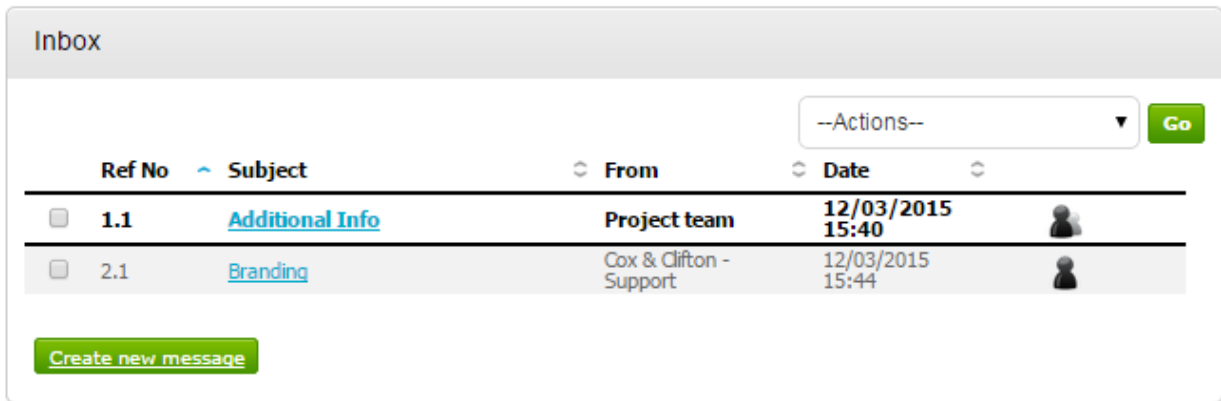
Subject:

Attachments: [+](#)

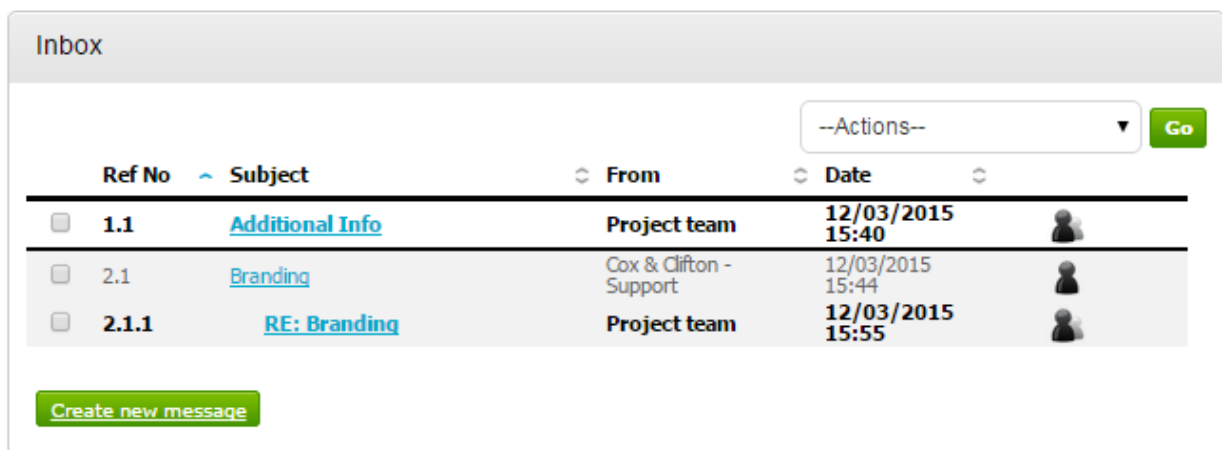
Will the branding be required on the front only, or back too?

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

The sent message is now shown in the Inbox.



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 publicly (so all suppliers involved in this stage) can see the response ( ). **Note:** The system will NEVER show which supplier sent the original message.



## Completing the Response (using attachments)

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

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**Main details**

**Title:** Example ITT **Respond by:** 03/14/2015 21:30:00

**Description:**  
Example ITT

---

**Public attachments**

Public attachments can be viewed by all procurers and suppliers involved in this rfx

<a href="#">ITT Attachment.docx</a>	12 KB
<a href="#">Specification &amp; Requirements Document.docx</a>	12 KB

---

**Terms & conditions**

**Time remaining**

<b>2</b> <small>Days</small>	<b>5</b> <small>Hours</small>	<b>21</b> <small>Minutes</small>	<b>30</b> <small>Seconds</small>
---------------------------------	----------------------------------	-------------------------------------	-------------------------------------

**Messaging**

You have 1 unread message(s).  
[View messages](#)

**Response controls**

[Start my response](#)

[Register intent to respond](#)

[No longer wish to respond](#)

## Responding to Online Questionnaires

When the 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 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.

### Question sets

Within the response wizard, one stage will be the **Question sets** section. Here, you can view the questionnaire(s) that is being used with the tender.

#### Create PQQ response

Title	Action	Progress	
Pre Qualification Questionnaire	<a href="#">Edit Response</a>	<div style="width: 100%; height: 10px; background-color: #ccc;"></div>	Mandatory
Lot 1 Questionnaire	<a href="#">Edit Response</a>	<div style="width: 100%; height: 10px; background-color: #ccc;"></div>	Opt Out
Lot 2 Questionnaire	<a href="#">Edit Response</a>	<div style="width: 100%; height: 10px; background-color: #ccc;"></div>	Opt Out

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

**Note:** This is optional, and the contracting organisation may not have included an online questionnaire, so if this stage may not be available.

If an evaluation has been included, click on **Edit response** to begin answering the questions/view further information and help.

Pre Qualification Questionnaire	<a href="#">Edit Response</a>	<div style="width: 100%; height: 10px; background-color: #ccc;"></div>
---------------------------------	-------------------------------	------------------------------------------------------------------------

This will open the evaluation summary screen.

## View Evaluation questions

Question	Weight %	Section Status	Status	Flag
<b>1 Company Information</b> <span style="float: right;">Incomplete section</span> <span style="float: right;">Section weight: 0.00%</span>				
1.1 Company Name	0.00%	<a href="#">Answer question</a>		
1.2 Company Address	0.00%	<a href="#">Answer question</a>		
<b>2 Pass / Fail Questions</b> <span style="float: right;">Incomplete section</span> <span style="float: right;">Section weight: 0.00%</span>				
2.1 Do you have an environmental policy?	0.00%	<a href="#">Answer question</a>		
2.2 Have you ever been declared bankrupt?	0.00%	<a href="#">Answer question</a>		
2.3 Please confirm if the Applicant (or any organisation within the Applicant's group, including any parent or subsidiary companies) has been accused of or found guilty of blacklisting. If so, please provide details, including the steps taken to address this.	0.00%	<a href="#">Answer question</a>		
2.4 The Council is	0.00%	<a href="#">Answer question</a>		

**Progress**

Progress bar with 10 segments, all empty.

**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.
- ✔ The answer has been automatically populated from a previous answer and does not need to be reviewed.
- ★ The question has been flagged for review.

**Public attachments**

<a href="#">Specification &amp; Requirements Document.docx</a>	9 KB
----------------------------------------------------------------	------

### Online Response

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:** Some questions may have a ✔ symbol next to them automatically. This means the question has been answered by you before, and is still valid.

1.1 Company Name      0.00%      [Answer question](#)      ✔

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

1.2 Company Address      0.00%      [Answer question](#)

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**.

## Company Information | Question 2 of 2

<b>Question</b> Company Address	<b>Weight</b> 0.00 %
<b>Answer</b> Flag question for review <input type="checkbox"/> Company Address is: 1 Supplier Street North Supplier UK <u>SU1</u> 1PL  <a href="#">Save and close</a> <a href="#">Previous</a> <a href="#">Next</a>	<b>Question attachments</b> No attachments  <b>Help</b> This question is mandatory Enter registered address of company

There may be further section help available. To view this, click [Show more information](#) in the top right of the screen.

[Show more information](#)

## Company Information | Question 2 of 2

<b>Question</b> Company Address	<b>Weight</b> 0.00 %
<b>Answer</b> Flag question for review <input type="checkbox"/>	<b>Question attachments</b> No attachments

There is also the ability to **flag a question for review**, by marking the tick box.

Flag question for review





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.

North Supplier UK <u>SU1</u> 1PL  <a href="#">Save and close</a> <a href="#">Previous</a> <a href="#">Next</a>	This qu Enter r
----------------------------------------------------------------------------------------------------------------------------	--------------------

Alongside each question, you may have one of the following icons;



**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.
-  The answer has been automatically populated from a previous answer and does not need to be reviewed.
-  The question has been flagged for review.

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%	
4.4 Company Name	0.00%	Answer question		

**Progress**



Each question may give different options on how you are required to answer the question. Examples are below; however the answer method is dictated by the organisation who has requested your answers.

### 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  No

Flag question for review

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

Flag question for review

### 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

Due North Ltd.

Flag question for review

[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

Add attachment

Click 'Add attachment' and you will be prompted with the document upload facility.

## Responding to Lot Questionnaires

When a buying organisation publishes questionnaire sets using Lots, they will appear in your Tender Summary page as shown below.

My response
27 Draft

▼ Evaluation criteria/question sets

Title	Action	Progress	
Pre Qualification Questionnaire	<a href="#">Edit response</a>	<div style="width: 100%; height: 10px; background-color: green;"></div>	Mandatory
Lot 1 Questionnaire	<a href="#">Edit response</a>	<div style="width: 50%; height: 10px; background-color: #ccc;"></div>	<a href="#">Opt out</a>
Lot 2 Questionnaire	<a href="#">Edit response</a>	<div style="width: 50%; height: 10px; background-color: #ccc;"></div>	<a href="#">Opt out</a>

[<Back to summary](#)

Time remaining

Respond by: 25 March 2015 01:30

4  
Days

10  
Hours

59  
Minutes

6  
Seconds

▼ Response controls

Submit response

[Open response wizard](#)

Submission checklist

**Note:** Where 'Mandatory' is stated alongside a 'Lot' this means that the question set must be answered.

**Note:** Where 'Opt out' appear this means that the questions are optional to be completed.

▼ Evaluation criteria/question sets

Title	Action	Progress	
Pre Qualification Questionnaire	<a href="#">Edit response</a>	<div style="width: 100%; height: 10px; background-color: green;"></div>	Mandatory
Lot 1 Questionnaire	<a href="#">Edit response</a>	<div style="width: 50%; height: 10px; background-color: #ccc;"></div>	<a href="#">Opt out</a>
Lot 2 Questionnaire	<a href="#">Edit response</a>	<div style="width: 50%; height: 10px; background-color: #ccc;"></div>	<a href="#">Opt out</a>




The response is completed by clicking Edit response and answering the questions. Once you have complete a series of questions the progress bar will be full.

Pre Qualification Questionnaire [Edit response](#) Mandatory

If you wish to opt out of a non mandatory set of questions, then you are required to click on **Opt out**.

Lot 1 Questionnaire [Edit response](#)[Opt out](#)

The system will then display your question sets in the following manor, to show questions sets you are required to answer and question sets you have opted out of.

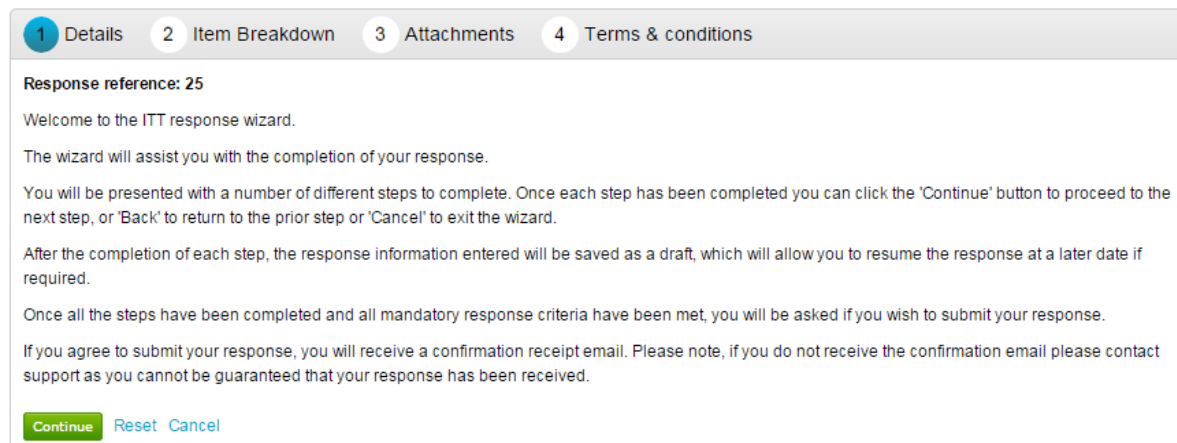
Evaluation criteria/question sets		
Title	Action	Progress
Pre Qualification Questionnaire	<a href="#">Edit response</a>	 Mandatory
Lot 1 Questionnaire	<a href="#">Edit response</a>	 <a href="#">Opt out</a>
Title	Action	Progress
Lot 2 Questionnaire	<a href="#">View question set</a>	 <a href="#">Opt in</a>

You can easily opt back in by clicking the *Opt in* option.

## 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** Item Breakdown   **3** Attachments   **4** Terms & conditions

**Response reference:** 25

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 or click **Cancel** to leave the wizard.

## Item Breakdown

The next screen in this example is the Item description breakdown, however, if no item breakdown has been specified by the procuring organisation then this stage will not appear.

This stage is where the prices are entered for specific items.

This will show;

**Item description-** Here the specific item that is being asked for is specified

**Unit of measure-** Specified by the procuring organisation, this is the items that the item is measured in.

**Quantity-** The number of items required.

**Unit Price-**The price per unit of the item, in the specified currency, is entered here.

**Total-** This is calculated by the system by multiplying the quantity by the item price.

To enter the prices into the system click **Edit** in the corresponding row and enter the amount per item, with any comments (optional) and click **Save** to return to the overview, or **Next** to move to the next item.

Item description	Unit of measure	Quantity	Price	Total
<b>Uniform</b>				
Branded Jumpers (Mens)	per jumper	500	£0 <a href="#">Edit</a>	-
Branded Cardigan (Womens)	per cardigan	500	£0 <a href="#">Edit</a>	-
<b>Total:</b>				-

Item description  
Branded Jumpers (Mens)

Item details  
Unit of measure: per jumper  
Quantity: 500

Unit price  
10

Supplier comments (optional)  
Same price for all sizes

[Save](#) [Next](#) [Previous](#)

Comments  
200 L, 200 M, 100 S

If you prefer, you can export the item template to Excel, complete there, and then upload the completed template using the **Import/Export** area as highlighted below.

### Create ITT response

[Details](#)
2
[Item Breakdown](#)
3
[Attachments](#)
4
[Terms & conditions](#)

Item description	Unit of measure	Quantity	Price	Total
<b>Uniform</b>				
Branded Jumpers (Mens)	per jumper	500	£10.00 <a href="#">Edit</a>	£5,000.00
Branded Cardigan (Womens)	per cardigan	500	£9.00 <a href="#">Edit</a>	£4,500.00
<b>Total:</b>				£9,500.00

**Import/Export**

[Export item template](#)

[Upload completed template](#)

If required you can export the item breakdown to an xls spreadsheet. This can then be completed offline and uploaded by using the links provided.

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

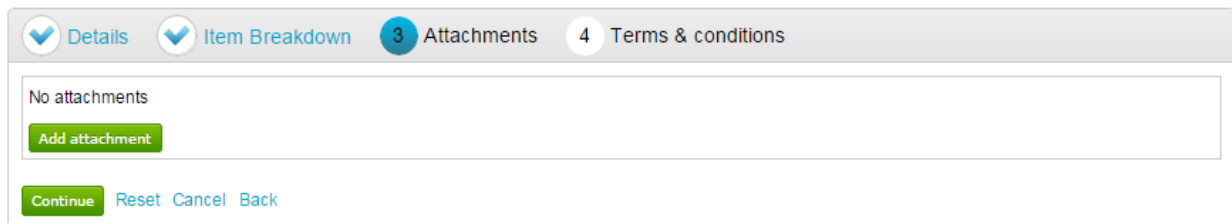
When complete click **Continue** to move onto the next page, **Reset** to begin the wizard again and remove all info, **Cancel** to leave the wizard completely (without saving) or **Back** to return to the previous stage.

## 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



The screenshot shows a wizard interface with four steps: 1. Details, 2. Item Breakdown, 3. Attachments (current step), and 4. Terms & conditions. The 'Attachments' step is highlighted with a blue circle and the number 3. Below the progress bar, there is a text area that says 'No attachments' and a green 'Add attachment' button. At the bottom of the wizard, there are four buttons: 'Continue' (green), 'Reset' (blue), 'Cancel' (blue), and 'Back' (blue).

To add an attachment click  .

You can now browse your computer for the attachments using the file uploader. You can add as many attachments as you require.

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.

## Terms and Conditions

The next stage asks whether you accept the Terms & Conditions associated with this tender.

You can view the terms by clicking on its name in blue, which will open the Terms and Conditions documents attached.

Then you must select Accept or Decline, and if you do not agree you must specify the reasons why you do not agree in the space provided.



## Create ITT response

Details Item Breakdown Attachments **4** Terms & conditions

Please follow the link to read the terms and conditions

[Standard Legal Terms](#)

Accept  
 Decline

**Finish** Reset Cancel Back

When complete click **Finish** to go back to the summary screen, **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 reconfirm this by clicking Submit response for a second time.

The screenshot displays the tender submission interface with the following components:

- My response:** Shows version 25 as a Draft.
- Terms & conditions:** Status is Accepted. Includes a link to Standard Legal Terms and a Decline button.
- Item breakdown:** A table listing items with their descriptions, quantities, units, and prices.
- Time remaining:** Countdown timer showing 2 Days, 4 Hours, 49 Minutes, and 5 Seconds. Respond by: 14 March 2015 21:30.
- Response controls:** Includes a Submit response button (highlighted in green), an Open response wizard link, and a Submission checklist.
- Attachments:** Shows one attachment: ITT Attachment.docx (12 KB).

Item description	Quantity	Unit of measure	Comments	Price
Uniform				
Branded Jumpers (Mens)	500	per jumper		£5,000.00
Branded Cardigan (Womens)	500	per cardigan		£4,500.00
Total				£9,500.00

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.)

**Submission checklist**

- Terms & conditions
- Attachments

## 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 **Create new version**.

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▼ Main details

Title: Example ITT Respond by: 03/14/2015 21:30:00  
 Description: Example ITT

▼ Public attachments

Public attachments can be viewed by all procurers and suppliers involved in this rfx

<a href="#">ITT Attachment.docx</a>	12 KB
<a href="#">Specification &amp; Requirements Document.docx</a>	12 KB

▼ Terms & conditions

[Standard Legal Terms](#)

Time remaining

<b>2</b> <small>Days</small>	<b>4</b> <small>Hours</small>	<b>40</b> <small>Minutes</small>	<b>32</b> <small>Seconds</small>
---------------------------------	----------------------------------	-------------------------------------	-------------------------------------

Messaging

You have 1 unread message(s).  
[View messages](#)

Response controls

[I would like to make a response](#)  
[No longer wish to respond](#)

My responses

<a href="#">Version 1</a>	Submitted	12/03/2015
---------------------------	-----------	------------

[+ Create new version](#)

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

**My response**
**26 Draft**

Each area can then be amended, either by editing the relevant section or clicking **Open response wizard**, and then submitted using the process outlined above.

▼ Item breakdown
[Edit](#)

Item description	Quantity	Unit of measure	Comments	Price
Uniform				

▼ Response controls

[Submit response](#)

[Open response wizard](#)

Submission checklist