



USER GUIDE: Provider Registration

Provider Reference Guide

Somerset County Council (SCC) has implemented a new Framework Agreement for Regulated Homecare Services in Somerset. This portal will enable suppliers to experience the most user-friendly and efficient way of submitting their details for SCC to hold on record for any relevant contracting opportunity that may arise.

This reference guide is a step-by-step walk-through to aid you in completing your registration on to this portal. Registering will mean you are able to see any relevant contracting opportunity with Somerset, and register your interest against this. Your details will be kept on the system to avoid you having to input the same information more than once, but will also offer the opportunity to amend the details we keep on file in case any of your details do change.

This portal works with most web-browsers, but may lose some functionality with older versions of Internet Explorer. Please ensure you have an up-to-date web browser, such as Google Chrome, for the best user experience

Should you experience any difficulty in registering, there is a help-line you can call. This can be found at the top right of the home screen. Clicking on the question mark next to your business name will bring up the 'Help' screen, as shown in picture 28 below.

Please note: The below guide uses Proactis' test system for demonstration purposes. The live system you will use is in exactly the same format, but any references to 'Test' or 'Demo/Demonstration' in this guide can be ignored

- 1) You will receive an email from the Proactis portal, as shown below. This will include a link (underlined blue text at the bottom of the email) that will take you directly through to complete the registration process.

*** THIS EMAIL HAS BEEN PRODUCED BY A TEST SYSTEM
*** SENT FROM: <https://www.proactisplazademo.com/>

Dear DEMO SUPPLIER

At Somerset County Council we are continually exploring ways in which we can deliver more efficient and effective solutions for our Providers, the Council and ultimately our customers. As part of this process we are implementing a new web based procurement system.

To make registration easier, we have already uploaded some basic information about your organisation, by clicking on the link below, the system will take you through a simple wizard allowing you to review the details we have entered, and allowing you to amend any of these details if required. This process should take under five minutes.

Click Here:

<https://SupplierDemo.ProactisP2P.com/Account/Activation/Index?Mod=2&Req=gbgt5pvfvan51t6gzmytnee30&cid=SOMERSETCC>

Please note that if you wish to see all the opportunities, you must register on the system.

- 2) Clicking on the link mentioned above will bring you through to the registration home screen. This will be a staged process that will guide you through the information SCC need from you in order to assess your eligibility to join the Homecare Framework.

Please complete this information as fully as possible, otherwise you may not be eligible to join the portal until you provide us with the information we need.

Customer Engagement | Organisation Details

DEMO SUPPLIER

1 2 3 4 5 6 7 8 9

Documents (1)

Organisation Details

Organisation ID *
D2527659

Organisation Name *
DEMO SUPPLIER

Registration Number ⓘ
 Not Applicable

VAT Number ⓘ
 Not Applicable

DUNS Number ⓘ
 Not Applicable

Organisation Type * ⓘ

- Public Company
- Limited Liability Company
- Partnership
- Sole Trader
- Limited Liability Partnership
- Government Body
- Third Sector

3) As you can see below, the required boxes have been filled out with information. Please note – this information is purely for demonstration purposes. You will need to complete this with correct and accurate information about your company.

 Customer Engagement | Organisation Details DEMO SUPPLIER  

◀ 1 2 3 4 5 6 7 8 9 ▶

Documents (1)

Organisation Details

Organisation ID *

Organisation Name *

Registration Number 
 Not Applicable

VAT Number 
 Not Applicable

DUNS Number 
 Not Applicable

Organisation Type * 

- Public Company
- Limited Liability Company
- Partnership
- Sole Trader
- Limited Liability Partnership
- Government Body
- Third Sector



- 4) In step 3 (above), the information relating to 'Registration Number', 'VAT Number', and 'DUNS Number' has been completed. On the right hand side of the picture in step 3, you can see that the option 'Limited Company' has been ticked. If you are not a Limited Company, and therefore do not hold this information, please select 'Not Applicable' (as shown below). Please also select the correct 'Operation Type' for your company to the right of the screen.

Once you have filled out all the correct information, please click on this arrow to move to the second stage of the process

Customer Engagement | Organisation Details DEMO SUPPLIER

1 2 3 4 5 6 7 8 9

Documents (1)

Organisation Details

Organisation ID *
D2527659

Organisation Name *
DEMO SUPPLIER

Registration Number ⓘ
 Not Applicable

VAT Number ⓘ
 Not Applicable

DUNS Number ⓘ
 Not Applicable

Organisation Type * ⓘ

Public Company

Limited Liability Company

Partnership

Sole Trader

Limited Liability Partnership

Government Body

Third Sector

5) Stage 2 is about understanding the areas of Somerset you would prefer to work in. There are 5 areas you can choose from, and you can select more than one area. Below, Mendip and Sedgemoor have been selected, but you are able to choose any combination you wish. It is worth noting that you will not hear of any opportunities for areas you do not select. If you wish to see all opportunities across the county, please select all areas, as you do not have to submit a bid for any areas you do not wish to operate in.

When your chosen areas have been selected, please click on the right-pointing arrow in the middle of the screen. This will align your chosen areas to your company's profile. Once you have done this, please click the arrow towards the top right of the screen to move you along to stage 3, as you did in the step above to move to stage 2.

The screenshot displays a web interface titled "Customer Engagement | Region". At the top right, it shows the user is logged in as "DEMO SUPPLIER". A progress indicator at the top center consists of nine numbered buttons (1-9), with button "2" highlighted in blue. Below this, there are two main panels: "Available" on the left and "Added" on the right. The "Available" panel lists five regions with checkboxes: "1: SOMERSET" (checked), "11: South Somerset", "12: West Somerset", "13: Mendip" (checked), "14: Sedgemoor" (checked), and "15: Taunton Deane". The "Added" panel lists three regions with checkboxes: "1: SOMERSET", "13: Mendip", and "14: Sedgemoor". Between the two panels are three circular icons: a right-pointing arrow, a left-pointing arrow, and a trash can icon. A large right-pointing arrow is also visible at the top center of the interface.

6) Stage 3 is a confirmation of the address SCC currently holds for you. If this is correct, please click the arrow to the top right of the screen to move to stage 4.

Should you wish to amend your address, please click the blue circle with a pencil in the middle (to the right of the screen) to edit this address. If you need to add an address, please click the 'Add Address' button.

 Customer Engagement | Address Details DEMO SUPPLIER ▾ ?
DEMO SUPPLIER

◀ 1 2 **3** 4 5 6 7 8 9 ▶

Organisation Addresses

Address	Enabled	Action
88 Withies Park, Midsomer Norton, Radstock, Somerset, BA3 2PB, UNITED KINGDOM	✓	

[+ Add Address](#)

- 7) Clicking either the edit or add address options mentioned above will bring this screen up. This will allow you to input the information regarding the address(es) linked to your company, and ensure it is accurate. You will also need to click on 'Contact Details' and 'Address Types' to make sure the information in these sections is as you would like it.

Please click 'OK' once you are happy with the information you have input. You will then be taken back to the screen above. Please click on the arrow to the top right of the screen to move to stage 4.

Customer Engagement | Address Details

DEMO SUPPLIER

Address Details

Address Contact Details Address Types

Property Name/Number * 88 Withies Park

Town * Radstock

Address 1 * Midsomer Norton

County Somerset

Address 2

Postcode * BA3 2PB

Address 3

Country United Kingdom

Address 4

OK Cancel

Enabled	Action
✓	

+ Add Address

8) Stage 4 is a confirmation of the user details SCC currently hold for you. If this is correct, please click the arrow to the top right of the screen to move to stage 5.

Should you wish to amend your address, please click the blue circle with a pencil in the middle (to the right of the screen) to edit this address. If you need to add an address, please click the 'Add Address' button.

Customer Engagement | User Details DEMO SUPPLIER

1 2 3 4 5 6 7 8 9

Organisation Users

Login Name	Full Name	Email Address	General Contact	e-Procurement Contact	Sales Contact	Payment Contact	Action
ADMIN	DEMO SUPPLIER	bwarden@somerset.gov.uk	✓	✓	✓	✓	

+ Add User Edit

- 9) Clicking either the edit or add address options mentioned above will bring this screen up. This will allow you to input the information regarding the contact details linked to your company, and ensure they are accurate. You will also need to click on 'User Details' to make sure the information in these sections is as you would like it.

Please click 'OK' once you are happy with the information you have input. You will then be taken back to the screen above. Please click on the arrow to the top right of the screen to move to stage 5.

The screenshot displays a web application interface for 'Customer Engagement | User Details'. The main header includes a logo on the left and 'DEMO SUPPLIER' with a dropdown arrow and a help icon on the right. Below the header, there is a section for 'Organisation Users' with a table containing columns for 'Login Name' and 'Full Name'. The table has one row with 'ADMIN' and 'DEMO'. To the right of the table is a table with columns for 'Sales Contact', 'Payment Contact', and 'Action', with checkmarks in the first two columns and an edit icon in the third. A '+ Add User' button is located below this table. In the foreground, a modal window titled 'Add/Amend User' is open, featuring two tabs: 'User Details' (selected) and 'Contact Type'. The 'User Details' tab contains several input fields: 'Login Name *' (ADMIN), 'First Name *' (DEMO), 'Surname *' (SUPPLIER), 'Email Address: *' (bwarden@somerset.gov.uk), 'Telephone Number *' (0), 'Mobile Number', 'Fax Number', and 'Address:' (88 Withies Park, Midsomer Norton, Rads...). At the bottom of the modal are 'OK' and 'Cancel' buttons.

Login Name	Full Name
ADMIN	DEMO

Sales Contact	Payment Contact	Action
✓	✓	

DEMO SUPPLIER ▼ ?

DEMO SUPPLIER

Customer Engagement | User Details

Add/Amend User

User Details | Contact Type

Login Name *
ADMIN

Telephone Number *
0

First Name *
DEMO

Mobile Number

Surname *
SUPPLIER

Fax Number

Email Address: *
bwarden@somerset.gov.uk

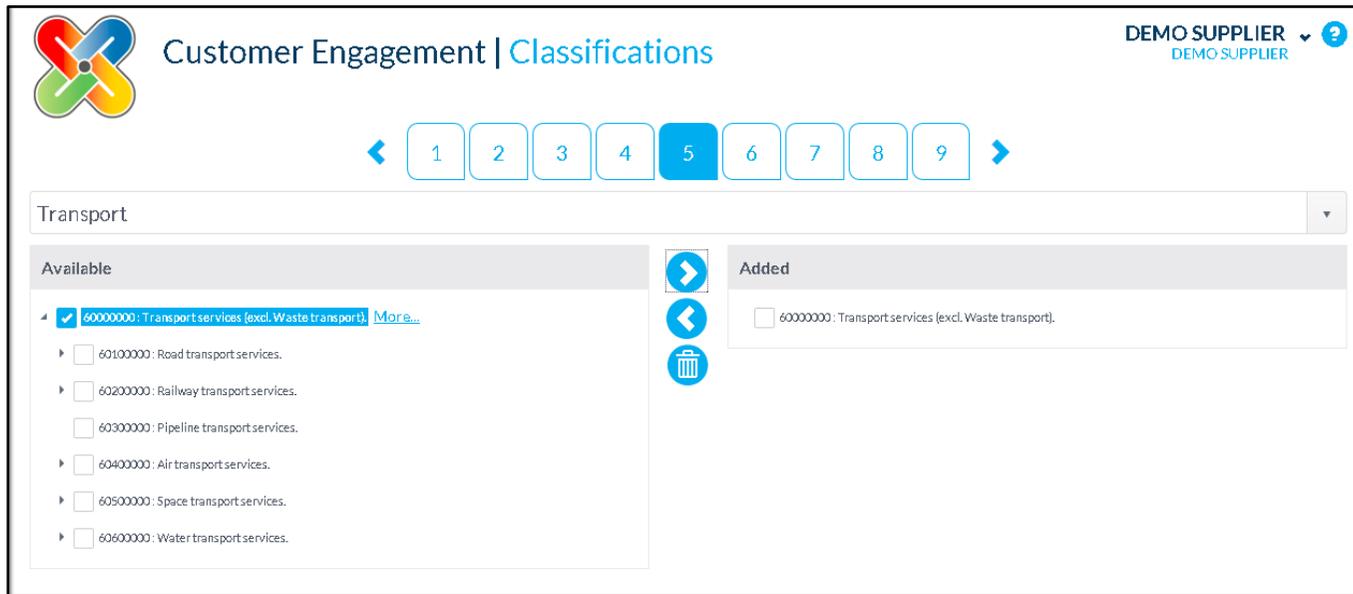
Address:
88 Withies Park, Midsomer Norton, Rads...

OK Cancel

+ Add User

10) Stage 5 relates to an area that links your profile with the type of work you're interested in. This is done by a supplier selecting a unique reference number that links to the area of work they operate in, and SCC using the same list of unique reference numbers to link to the opportunities they advertise. When an opportunity is advertised with the relevant reference number, all suppliers who have linked themselves to the same number will receive an email notification.

Because of this, it is extremely important to link your company to all the codes that are relevant to your company. You can see below that the word 'Transport' has been used to search for relevant reference numbers, listed below. Please select the reference numbers applicable to your company, and click the right-facing arrow in the middle of the screen to align these with your profile. Please then click the arrow at the top right of your screen to move to stage 6.



NB these unique reference numbers are called Common Procurement Vocabulary (CPV) codes, should you see this terminology in other literature.

11) Stage 6 is the Selection Questionnaire which includes questions on financial stability of your company, sustainability, health and safety etc. Please answer all these questions truthfully and accurately.



Customer Engagement | Questionnaire

DEMO SUPPLIER ▼ ?
DEMO SUPPLIER

◀ 1 2 3 4 5 **6** 7 8 9 ▶

! Please complete the following questionnaire from Somerset County Council.

! Click or touch the headings to expand each section. You must fill in all questions with a * next to them.

- 1: General (3 questions)
- 2: Mandatory exclusion (2 questions)
- 3: Discretionary exclusion (2 questions)
- 4: Economic and Financial Standing (2 questions)
- 5: Insurance (1 question)
- 6: Sustainability (1 question)
- 7: Health & Safety (2 questions)

12) There are a number of answers that are the default response for each question. Please read through each of these carefully to ensure the information provided represents your company fairly. There are drop-down boxes for most of the questions, as show below, should you wish to amend any of the answers.

 Customer Engagement | Questionnaire DEMO SUPPLIER  

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

 Please complete the following questionnaire from Somerset County Council.

 Click or touch the headings to expand each section. You must fill in all questions with a * next to them.

1: General (3 questions)

1.01 Confirm you have read and understood the attached guidance notes? (10)

1.02 Do you fully accept the terms and conditions as attached? (10)

1.03 Do your Directors, Partners or the Company Secretary have any relatives who are currently employed by Somerset County Council at a senior level or who are currently employed as an elected Member of the Authority?

2: M... (3 questions)

13) Stage 7 is used to check your primary contact details. Please fill these details out with your company's correct contact details, if they are not already there.



Customer Engagement | Primary Contact Details

DEMO SUPPLIER  

< 1 2 3 4 5 6 7 8 9 >

Primary Contact Details

Organisation Name

Login Name

First Name *

Surname *

Email Address: *

Telephone Number *

Memorable Questions

What is your Mother's maiden name? *

What is the name of the town where you were born? *

What was the name of your first school? *

14) Stage 8 details Proactis' Terms and Conditions (Ts&Cs). You must agree to these if you wish to apply for inclusion on the Homecare Framework. If you agree with these Ts&Cs, please click the box next at the bottom of the screen, as shown below. Please then click the arrow to the top right of the screen to move to the final stage.

 Customer Engagement | Terms and Conditions

DEMO SUPPLIER  

1 2 3 4 5 6 7 8 9

Terms and Conditions

PROACTIS GROUP LIMITED
USER LICENCE
YOU MUST READ THE FOLLOWING BEFORE CONTINUING

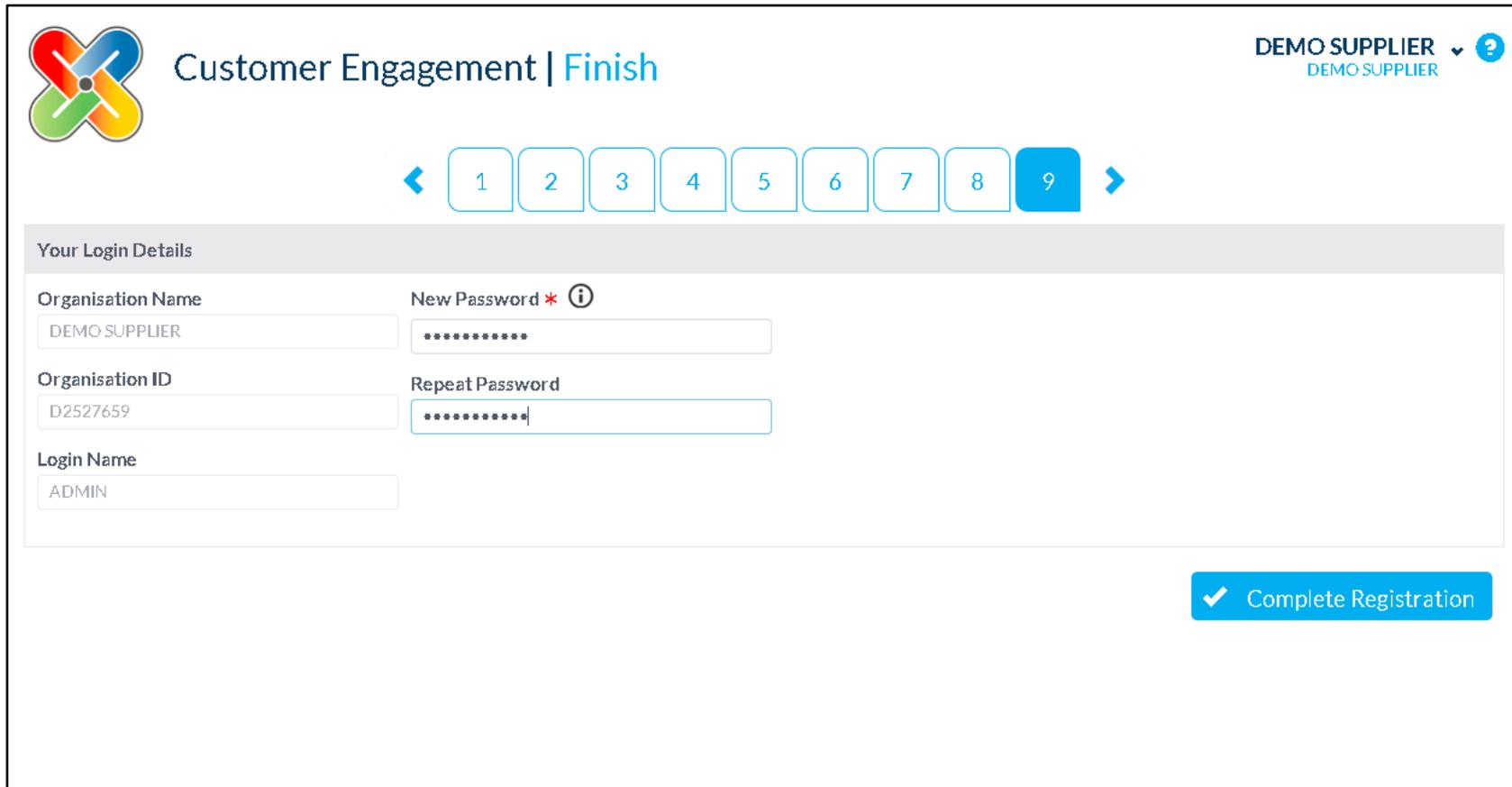
The use of the software provided by PROACTIS Group Limited is subject to the following User Licence. You must carefully read through the User Licence. By accepting the Licence you confirm that you have read the User Licence and that you agree to be bound by the terms and conditions of the User Licence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

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

4. Definitions and INTERPRETATION

I have read and understood the Terms and Conditions for using the Supplier Network

15) Stage 9 is the final stage in the registration process. Please input a memorable, secure password that you will use for logging to the portal from this point on. Once you're happy with the password, please click 'Complete Registration' at the bottom of the screen. Your registration is now complete.



 Customer Engagement | Finish

DEMO SUPPLIER  
DEMO SUPPLIER

◀ 1 2 3 4 5 6 7 8 9 ▶

Your Login Details

Organisation Name	New Password * 
<input type="text" value="DEMO SUPPLIER"/>	<input type="password" value="*****"/>
Organisation ID	Repeat Password
<input type="text" value="D2527659"/>	<input type="password" value="*****"/>
Login Name	
<input type="text" value="ADMIN"/>	

 Complete Registration

16) Following the completion of your registration, you will receive another email from the Proactis portal, as show below, giving you a summary of your company's information, and a link for logging in to the portal in future.

*** THIS EMAIL HAS BEEN PRODUCED BY A TEST SYSTEM
*** SENT FROM: <https://www.proactisplazademo.com/>

You have been sent this email because your Organisation has just registered on the Supplier Network website. Any buying organisations that you have attempted to engage with are aware of your interest and may be in contact in due course.

To access the portal use the details below along with the password which was set during registration:

Organisation ID: D2527659
Organisation Name: DEMO SUPPLIER
Primary Contact Name: DEMO SUPPLIER
Login Name: ADMIN
Supplier Network website URL: <https://SupplierDemo.ProactisP2P.com/?cid=SOMERSETCC>

If you have forgotten your password please [click here](#)

17) Clicking on the link mentioned above will lead to your company's home screen, once you have input you company's log on details. This is a very useful area that provide links to opportunities advertised by SCC, shows you what contracts you already have running, and whether you have any unread notifications.

Should you wish to amend any of your company's information, please click on the arrow next to your company's name in the top right hand corner of the screen. Click on 'Your Business', and amend your information as detailed above. Please see the user-guide for further information.

