Staffordshire
County Council

Staffordshire County Council

eSourcing Portal User Guide

Version 1.11

(6th February 2018)

These instructions have been produced to assist suppliers using the electronic sourcing platform. The County Council reserve the right to to update and re-issue the instructions with no prior notification to suppliers. Please note that the instructions are as accurate as possible and the County Council accepts no responsibility where the instructions differ from changes in the platform functionality.

This site operates best using Internet Explorer (versions 9 and above), or the latest versions of Safari, Firefox and Chrome. A screen resolution of 1024 x 768 or above is recommended.

For any urgent technical issues or forgotten passwords please use either the 'Contact Us' facility on the homepage or call Proactis direct on 0330 0050352

It is important that you call Proactis with any issues encountered submitting tenders, especially if you leave uploading until the last day. (not recommended)

Look at pages 1 to 7 only

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Staffordshire County Council E-Tendering Portal User Guide

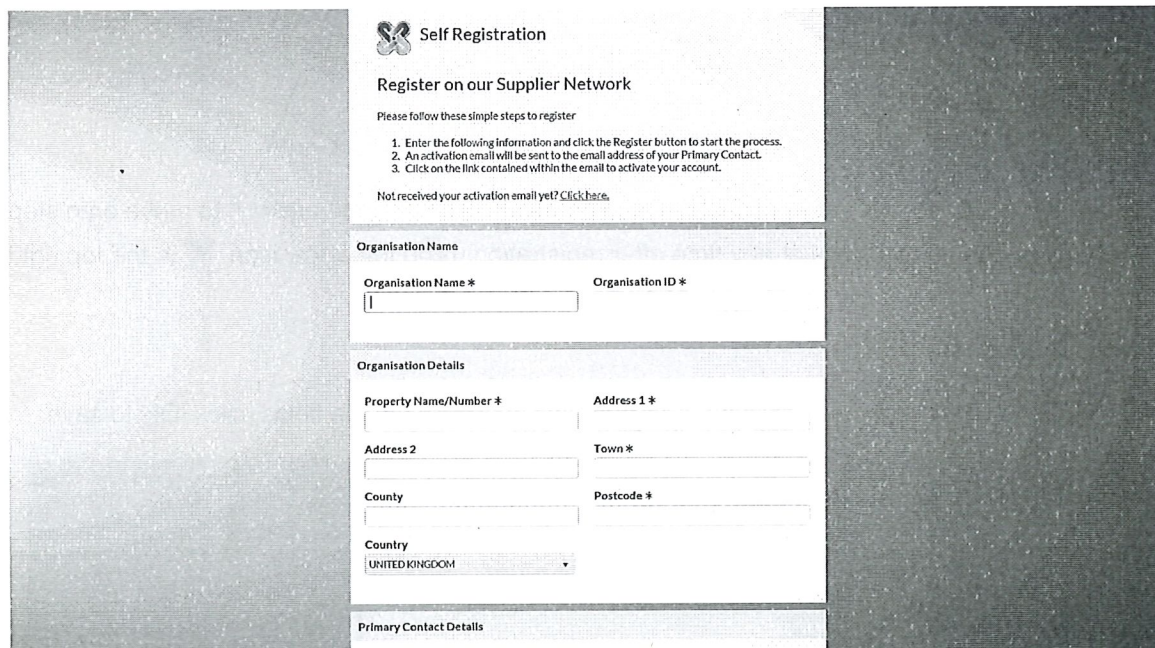## Important Information - Points to remember

- It is the supplier's responsibility to ensure that a copy of ALL documentation is retained by the supplier prior to any submission.

- The supplier is required to download this document (and any other) from the portal to a secure location on their own server / computer drive. From this location the supplier is then able to populate and save the questionnaire as requested.

- Please ensure no individual attachment is greater than **10MB** in file/memory size.

- It is recommended that all submissions are PDF formatted prior to submission.

- Ensure that no uploaded portal attachments possess any software virus that prevents the County Council opening the documents post-deadline. Ensure also that any software media / file types used are commonplace to the County Council and that file types are not corrupt when uploaded. **It is always recommended to present documents in a PDF format to avoid such issues.** The County Council reserves the right to disqualify any tender submission which cannot be opened (for the reasons discussed) post-deadline.

- **NOTE** – It is the suppliers' responsibility to maintain an 'active' tender account throughout the process. Accounts tend to become inactive if a supplier mistakenly keys-in an incorrect password several times. It is not the responsibility of the Council to monitor the status of tenderer accounts. Please note for suppliers' who are subsidiaries or franchises of an organisation you will need to have your own email account and register for a password unique to your organisation.

- Please be aware that any tender communications may not be available to view if an account is inactive. In the first instance, please contact the Buyer direct to get the account re-instated. It is required that the supplier regularly checks the status of their tender accounts during a procurement. The Council is not responsible for any missed communications (or the consequences) due to inactive accounts or periods where suppliers take annual leave etc.

- It is the suppliers responsibility to update the eTendering portal with any changes in its staffing

- All returns <u>must</u> be made via the portal only and within the stated timescales.

- Suppliers are required to submit all clarification questions which arise during the Procurement period <u>**in writing using the eTendering portal only**</u>

- Suppliers who decide that they do not wish to apply for an opportunity once they have registered an interest can decline the opportunity. This makes the supplier "inactive" on the opportunity and you will no longer receive dialgoues or alerts for that opportunity.
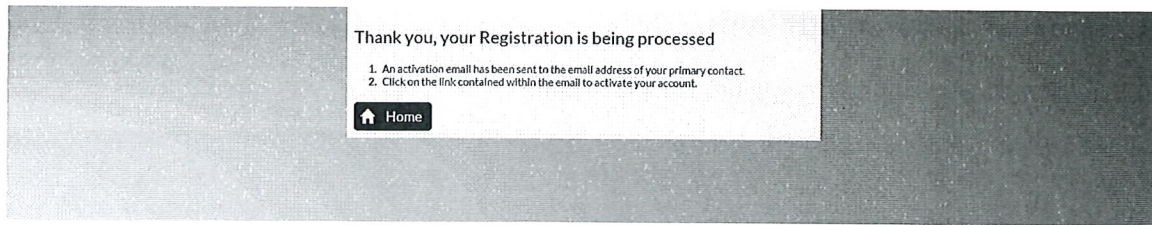
1. Supplier Self Registration

The portal can be found at https://www.proactisplaza.com/

Click 'Sign Up' and populate all the fields including the Organisation ID which is created by the user. All fields with an asterix (*) are mandatory.

Complete the information and click 'Register' at the bottom of the page. The system may ask you to confirm that your organisation is not already registered. Tick the appropriate box and continue. Or the system will explain that your account needs to be authenticated.

Thank you, your Registration is being processed

1. An activation email has been sent to the email address of your primary contact.
2. Click on the link contained within the email to activate your account.

🏠 Home

The system will send you an email. Check all mail boxes; including trash and spam. Click the link 'Click here to activate your account' in the email to return to the Portal and enter your details. It is important that you do this within 24 hours of receiving the email. Complete the fields and click 'Next'.

Step One: Organisation Details

Complete the fields or select 'Not Applicable'. Once complete click the next arrow ❯ to move onto step two. Your profile can be amended at any time after registration using the arrow icon ❤ in the top right corner.

Step Two: Addresses

If you wish to add more addresses click on 'Add Address' and populate the fields, click 'Ok' to save.
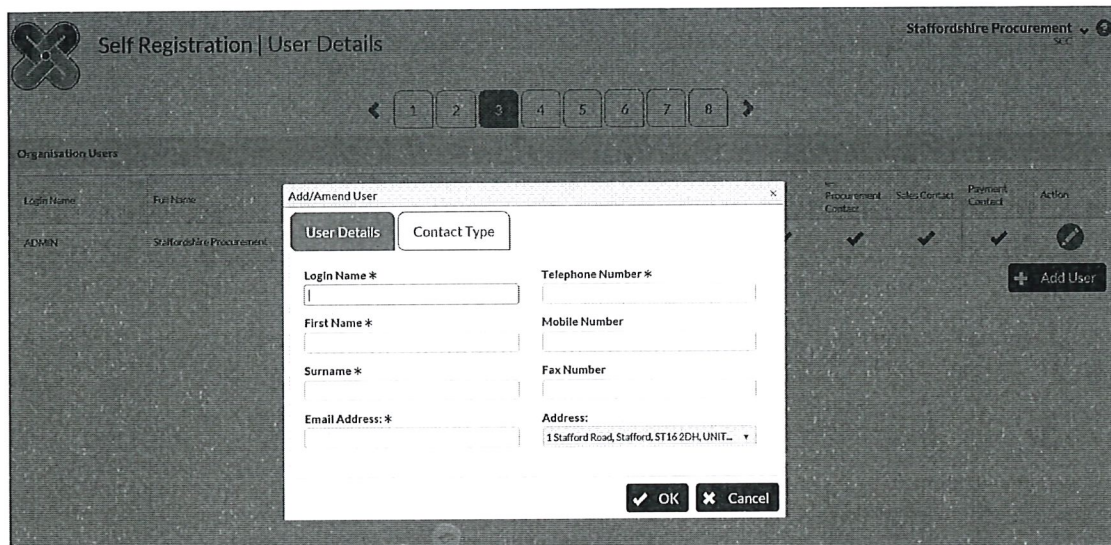
To amend an address, click the pencil ![pencil icon]. Work through the tabs. Click 'Ok' to save or 'Cancel' to close the box. Click 'Next' to move to Step Three.
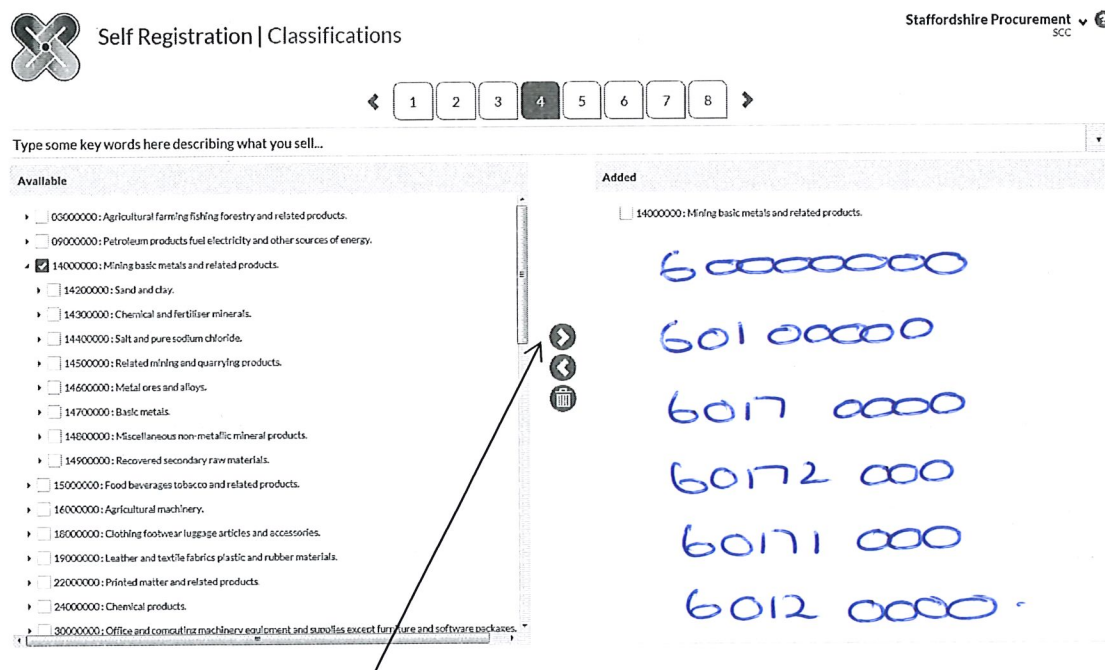
Step Three: Users

Click 'Add User' to add additional staff to your account. Click 'Ok' to save or 'Cancel'. To edit details of an existing user, click the pencil underneath the Action tab or click 'Next' to move on.

Step Four: What you Sell

The system uses CPV (Common Procurement Vocabulary) classification codes to identify what you sell. In the search box type key words that describe what you sell and click. The results will be displayed below.

Click on the arrows to add/remove the category to your profile. Repeat as required. Click ❯ to move to the next step.

Step 5: Buyer Selection

Self Registration | Buyers

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SCC

‹ 1 2 3 4 **5** 6 7 8 ›

Select Buyer Organisations

Title	Town	Post Code	County	Country	
AB Ports	London	WC2B 4HN		UNITED KINGDOM	☐
Bassetlaw District Council	Worksop	S80 2AH	Nottinghamshire	UNITED KINGDOM	☐
Bedford Borough Council	Bedford	MK42 9AP	Bedfordshire	UNITED KINGDOM	☐
Blaenau Gwent County Borough Council	Ebbw Vale	NP23 6XB		UNITED KINGDOM	☐
Bridgewater Associates	Bridgewater			UNITED STATES	☐
Bristol City Council	Bristol			UNITED KINGDOM	☐
Cancer Research UK	London	EC2 5GT		UNITED KINGDOM	☐
Cardiff Council	Cardiff	CF10 4UW		UNITED KINGDOM	☐
Chartered Institute of Management Accountants	London	SW1P 4NP		UNITED KINGDOM	☐
Civica Borough Council	Luton	LU4 8SP	Bedfordshire	UNITED KINGDOM	☐
Ceilite	Newtownmountkennedy		Co. Wicklow	IRELAND	☐
Coventry City Council	Coventry	CV1 2FW		UNITED KINGDOM	☐
East Midlands Strategic Commercial Unit	Arnold	NG5 8PP	Nottinghamshire	UNITED KINGDOM	☐

This allows you to be included into a buyer's directory for private tender invites etc. Ensure that you select 'Staffordshire County Council' as a minimum by ticking the box. Click ⟩ to move on.

Step Six: Primary Contact Details

Self Registration | Primary Contact Details

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‹ 1 2 3 4 5 **6** 7 8 ›

Primary Contact Details

Organisation Name
SCC

Login Name
ADMIN

First Name ∗
Staffordshire

Surname ∗
Procurement

Email Address: ∗
alison.morgan@staffordshire.gov.uk

Telephone Number ∗
01785 854654

The primary contact has overall administration rights for the supplier. Confirm the details are correct and click ⟩ to move to Step Seven.

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Step Seven: Terms and Conditions

Self Registration | Terms and Conditions

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

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 License you confirm that you have read the User License 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.

1. Definitions and INTERPRETATION

☐ I have read and understood the Terms and Conditions for using the Supplier Network
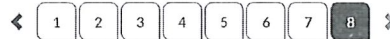
Tick to agree with the Terms and Conditions of using the Portal. Click ➤ to move to the final step.

## Step Eight: Complete Registration

Self Registration | Finish

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

Your Login Details

Organisation Name	New Password * ⓘ
SCC	
Organisation ID	Repeat Password
SCC1	
Login Name	
ADMIN	

✔ Complete Registration

Create your password which must be between 4 and 15 characters in length and contain at least 2 numbers. Passwords expire every 2 months. Then click ➤ you will then be brought to your homepage within the Portal.
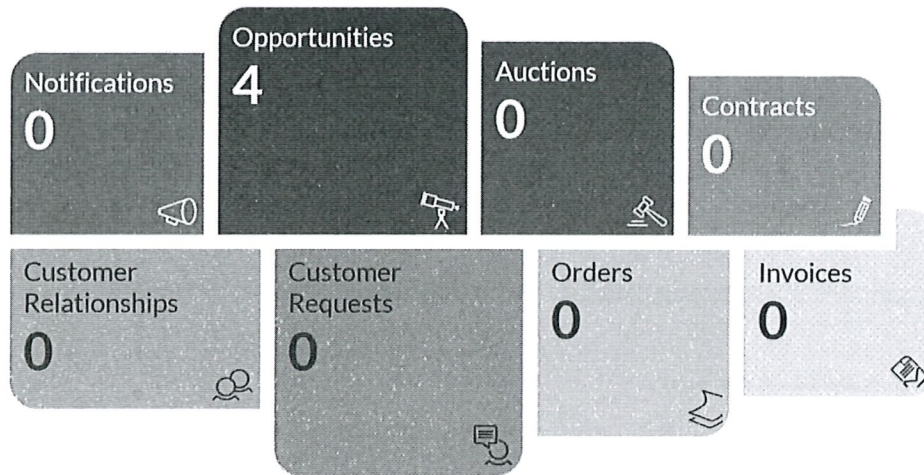
2. Home Screen Explained

Notifications – Displays any buyer notifications that require your attention.

Opportunities – Displays opportunities from UK organisations which use Proactis, allows you to express an interest and submit your tender response.

Auctions – Displays available auctions

Contracts – Displays contracts awarded to your organisation

Customer Relationships – Search and manage trading requests between you and your customers

Customer Requests – Search and manage trading requests between you and your customers

Orders – Displays orders raised to your organisation.

Invoices – View, print and resend invoices to the customer.

3. Search for an Opportunity & Submit a Tender

Your Opportunities

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From here you can review the requests that have been sent to you by customers and create responses.

Search by customer reference, title or customer name...   🔍 Search   ✔ Filters

Reference	Customer Name	Title	Type	Closing Date	Time Remaining	Show Me
RFQ_REQ1000020	National Trust	test notice	Advertised	01/02/2015 00:00	12 days 13 hours	❯
RFQ_REQ1000021	National Trust	Rachel 2 stage	Advertised	01/02/2015 00:00	12 days 13 hours	❯
ERFX1000292	Cardiff Council	Provision of Training Services	Advertised	10/03/2015 00:00	1 month 22 days	❯
ERFX1000270	Cardiff Council	DPS - Domiciliary Care Provision	Advertised	01/01/2017 00:00	More than a year	❯