



PROACTIS:

Supplier User Guide

Contract Management

- Introduction
- Why PROACTIS
- Contract Management
 - Tender award
 - Updating Contractor details
 - Accepting tender award
 - Accepting / rejecting the contract offer
- General Contract Management
 - Reviewing your contract
 - Contract Messages
- PROACTIS Supplier Manuals

This manual is intended for all existing Coillte Supplier Network Users

Instructions are provided on Contract Management within the Supplier Network

Please familiarise yourself with the manual prior to reviewing your contracts within the PROACTIS Supplier Network

- The PROACTIS Supplier Network is very easy to use.
- You can self register and maintain your own data, downloaded documents
- Submit tender responses electronically 24 hours a day, 7 days a week.
- Tenders lodged electronically do not incur postage or courier costs
- You receive automatic confirmation that your response has been received.
- You can search the database for awarded contracts as a means of identifying potential business leads.

On the Supplier Network you are able to;

- Search for sales opportunities
- Create relationships with customers
- Register an interest in opportunities
- Respond to opportunities online
- Create electronic invoices and get paid more quickly
- Communicate with your customers online

Tender Award

Successful contractor(s) will receive a letter of tender offer sent by email

i Terms and conditions

i Bank Account details

i Two insurance declaration forms are attached:

1. Contractor's own broker insurance
2. Coillte Chartis insurance scheme

If an insurance form has not already been provided for the service being delivered, you must complete and submitted.

From: coillte@proactis.com
To: philip.pandhal@coillte.ie
Cc: Philip Pandhal
Subject: [REDACTED]

Sent: Thu 18/12/2014 09:00

Message: Terms and Conditions acceptance form.pdf (47 KB) Chartis Insurance deduction scheme form.pdf (136 KB) Bank account details form.pdf (176 KB) Contractor Insurance Confirmation form.doc (290 KB)

Dear Philip Pandhal,

I refer to your recent tender for the above competition, for which the evaluation process is now completed.

I am pleased to inform you have been selected as the successful tenderer designate, subject to the conclusion of contract under the terms and conditions of the tender documentation.

The following four steps now need to be completed:

- 1) Using the dialogue function in the system please reply indicating acceptance or rejection of the offer. Also, please indicate the type of insurance cover for the contract (own or Coillte AIG scheme).
- 2) Prior to contract agreement we will require the following (if not already provided):
 - An up to date Tax Clearance Certificate issued by the Revenue Commission must be provided prior to the conclusion of contract agreement. This tax clearance status must be maintained for the life of the contract.
 - A completed insurance declaration form (own or AIG scheme) to cover the service to be provided.
 - Bank account details, provided on company headed paper.
 - A signed declaration form accepting Coillte standard terms and conditions.
- 3) Once complete, please upload the documents to SMS (use the Contract Management User Manual found on www.coillte.ie and then forward by e-mail the relevant documents to the Accounts Payable team on accounts payable@coillte.ie and include the category manager on the e-mail (see address below).

Please complete the above within five working days, otherwise this offer will be withdrawn and offered to the next highest scoring tenderer.

This letter is without prejudice to Coillte, does not purport to create a legally binding relations and no legitimate expectation may arise there from.

Yours Sincerely,

i Instructions within Letter of Offer

The contractor(s) must then ensure they have all relevant details in order to deliver the service;

- Insurance,
- Tax Clearance Certificate,
- Bank Account details.

Once complete Contractor(s) details must be updated within SMS where a message must be sent to Coillte accepting the letter of offer

Updating Contractor details

Complete the required forms and then Log into the Supplier Management System (SMS) and upload the information, as follows:

Copy / type the link into your internet browse

<https://www.proactisplaza.com/SupplierPortal/?CID=coillte>

To enter the PROACTIS Supplier Network



Sign In

Organisation ID

Login Name

Password

[Sign In](#) [Forgotten login details?](#)

Don't have an account? [Sign up](#)

Have you been invited?

Access Code

[Go](#)

[View Opportunities](#)

Powered by **PROACTIS**
The Spend Control Company

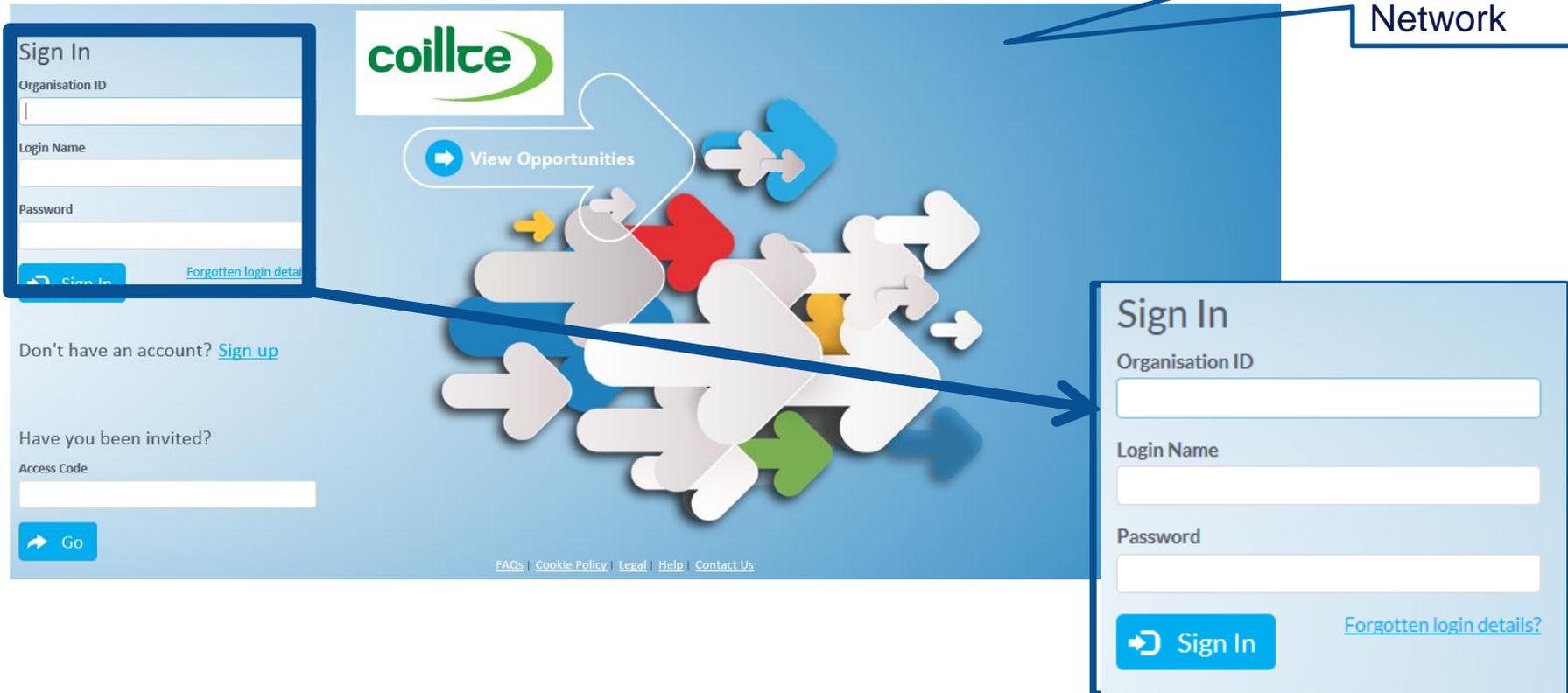
[FAQs](#) | [Cookie Policy](#) | [Legal](#) | [Help](#) | [Contact Us](#)

Feel free to
view Public
Opportunities

Updating Contractor details

Sign In

Step One requires you to sign into the Supplier Network



The image shows a screenshot of the coillte website's Sign In page. The page features the coillte logo at the top left, a central graphic of various colored arrows, and a 'View Opportunities' button. A callout box on the right explains that Step One requires signing into the Supplier Network. Two callout boxes highlight the Sign In form: one on the left shows the form in its context on the page, and one on the right provides a zoomed-in view of the form fields.

coillte

[View Opportunities](#)

Sign In

Organisation ID

Login Name

Password

[Forgotten login details?](#)

[Sign In](#)

Don't have an account? [Sign up](#)

Have you been invited?

Access Code

[Go](#)

[FAQs](#) | [Cookie Policy](#) | [Legal](#) | [Help](#) | [Contact Us](#)

Updating Contractor details

Navigate to 'Your Business'



Supplier Network

Notifications
154



Opportunities
0



Auctions
0



Customer Relationships
3



Customer Requests
4



Orders
41



Invoices
8



Paul Szypulinski 

Yorkshire Purchasing Organisation

Hi, Paul!

- Your Business**
- Your Transactions
- Your Subscriptions
- Change Password
- Sign out

Click on your name

Select 'Your Business'

Updating Contractor details

Enter the Documents Library



Your Business

 Save



About You

Addresses

Users

What You Sell

Documents

Preferences



Paul Szypulinski 
Yorkshire Purchasing Organisation

Select 'Documents' to maintain your document library



Clicking on the PROACTIS Tool tip provides information on the requested fields

Organisation Details

Organisation ID *

YPO

Organisation Name *

Yorkshire Purchasing Organisation

Registration Number 

Not Applicable

VAT Number 

Organisation Type * 

Public Company

Limited Liability Company

Partnership

Sole Trader



You can maintain your Business details here

Updating Contractor details

To ensure you have all relevant details in order to deliver the service please either;

- Add new updated documents to your existing library

OR

- View and if required amend existing documents within your library.

Both options are described here

Adding a document

Select to Add a document



Your Business

Paul Szypulinski  
Yorkshire Purchasing Organisation

Select '+ Add Document' to upload the relevant form



About You

Addresses

Users

What You Sell

Documents

Preferences



Search by document name...

 Search

 Add Document

Name	Type	Last Changed	Expires In	Visible to all Customers	Show Me
ANDY TEST g	Matt	30/06/2011 16:16:32	Expired		
TEST IMAGE	Employers Liability Insurance Certificate	29/03/2011 11:49:13	Expired		

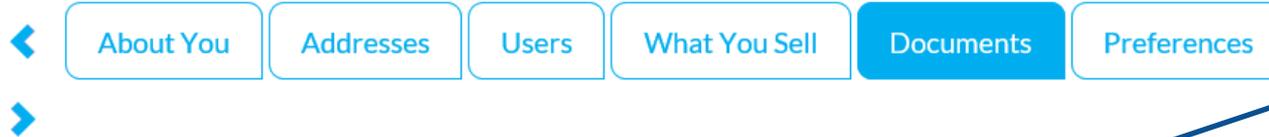
Adding a document

Enter the document specific information



Your Business

Paul Szypulinski ▾ ?
Yorkshire Purchasing Organisation



Enter the Name of the document e.g. "Tax Clearance Certificate"

New Document

Please be aware that all your customers will be able to see this document

Name

Type
Employers Liability Insurance Certificate ▾

Expiry Date
30/01/2015

New File
Attach file... Or drag and drop a file here

OK Cancel

Enter the expiry date of the document if requested

Select from the drop down menu the document. If there is not a suitable option available select "generic document"

Adding a document

Select a document and upload

New File

 Attach file... *Or drag and drop a file here*

Either select 'Attach' file and select a file to upload or drag a file and drop it into the area

Click 'OK' to complete the upload



Your Business

Paul Szypulinski  
Yorkshire Purchasing Organisation

- About You
- Addresses
- Users
- What You Sell
- Documents**
- Preferences

Search by document name...

 Search

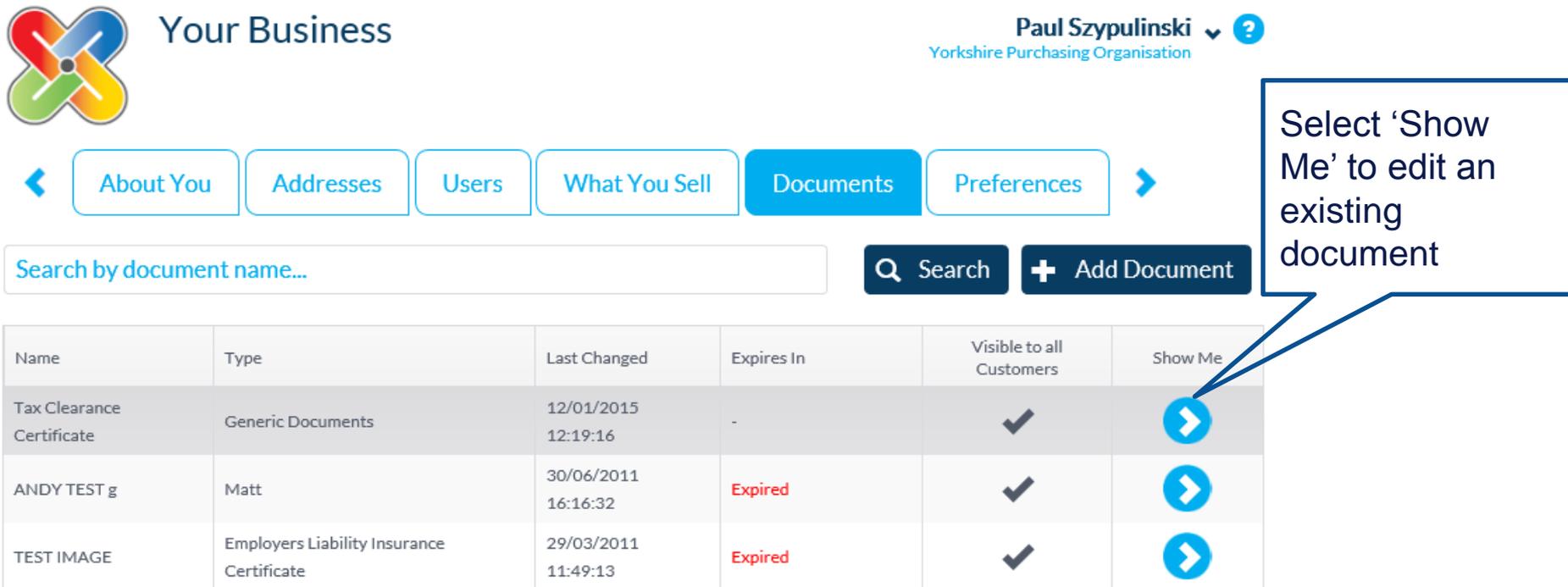
 Add Document

The file is added to your document library

Name	Type	Last Changed	Expires In	Visible to all Customers	Show Me
Tax Clearance Certificate	Generic Documents	12/01/2015 12:19:16	-	<input checked="" type="checkbox"/>	
ANDY TEST g	Matt	30/06/2011 16:16:32	Expired	<input checked="" type="checkbox"/>	
TEST IMAGE	Employers Liability Insurance Certificate	29/03/2011 11:49:13	Expired	<input checked="" type="checkbox"/>	

Editing a document

If editing / updating existing documents select to amend



Your Business

Paul Szypulinski ▾ ⓘ
Yorkshire Purchasing Organisation

◀ About You Addresses Users What You Sell **Documents** Preferences ▶

Search by document name... 🔍 Search + Add Document

Name	Type	Last Changed	Expires In	Visible to all Customers	Show Me
Tax Clearance Certificate	Generic Documents	12/01/2015 12:19:16	-	✓	➔
ANDY TEST g	Matt	30/06/2011 16:16:32	Expired	✓	➔
TEST IMAGE	Employers Liability Insurance Certificate	29/03/2011 11:49:13	Expired	✓	➔

Select 'Show Me' to edit an existing document

Editing a document

Select to edit



Your Business

Paul Szypulinski  
Yorkshire Purchasing Organisation



About You

Addresses

Users

What You Sell

Documents

Preferences



Search by document name...

 Search

 Add Document

Name	Type	Last Changed	Expires In	Visible to all Customers	Show Me
Tax Clearance Certificate	Generic Documents	12/01/2015 12:19:16	-	<input checked="" type="checkbox"/>	

Name	Type	Download	File Name
Tax Clearance Certificate	Generic Documents		Phil todo.xlsx

 Edit  Delete

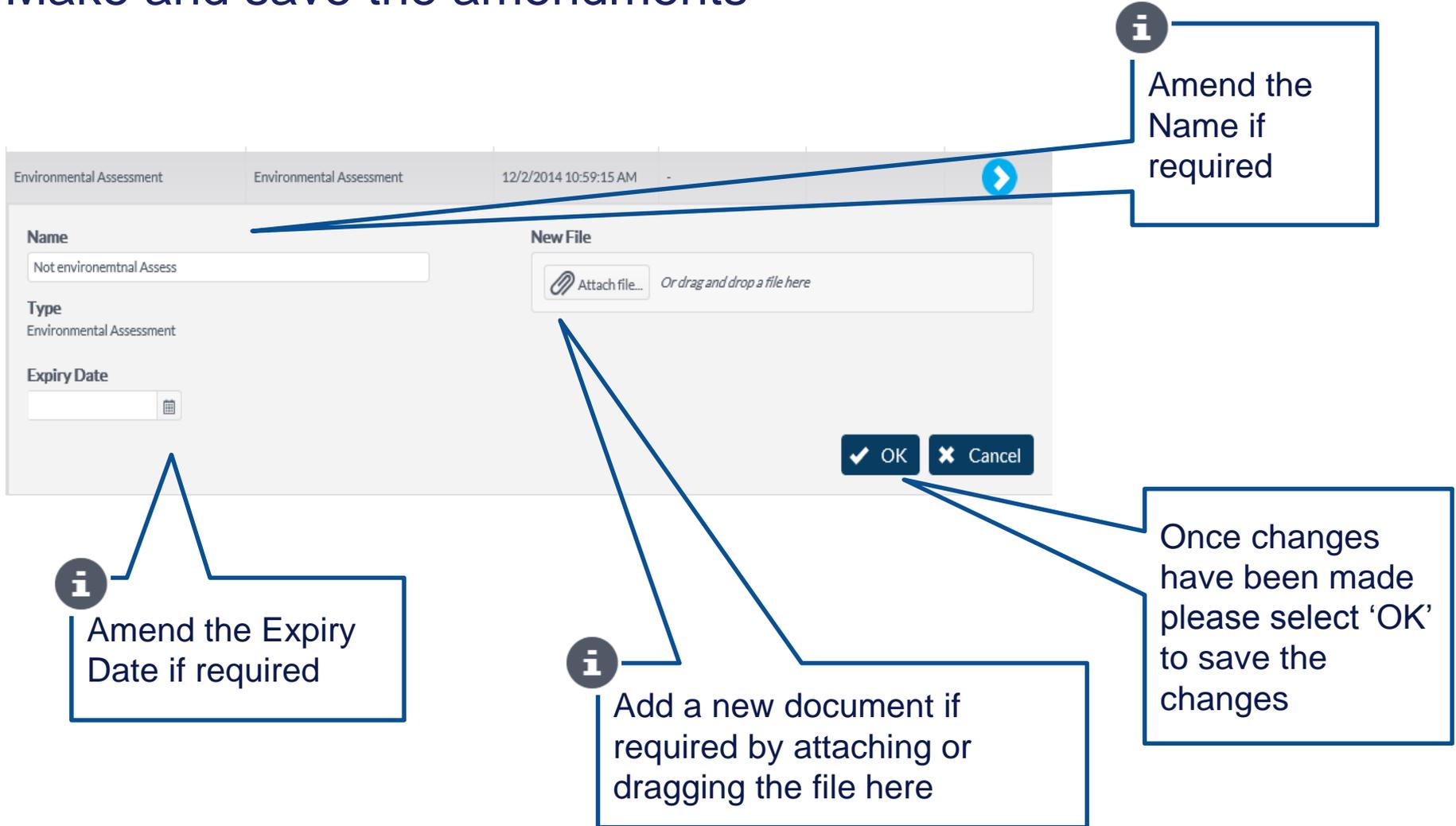
Select 'Edit' to make amendments

 Documents may be removed by selecting 'Delete'

 You can view the document by double clicking and then opening the document icon

Editing a document

Make and save the amendments



The screenshot shows the 'New File' dialog box in the PROACTIS system. The dialog has a header with 'Environmental Assessment' and a timestamp '12/2/2014 10:59:15 AM'. Below the header, there are three main sections: 'Name' with a text input field containing 'Not environemtral Assess', 'Type' with a dropdown menu set to 'Environmental Assessment', and 'Expiry Date' with a date picker. To the right of these fields is a 'New File' section with an 'Attach file...' button and the instruction 'Or drag and drop a file here'. At the bottom right of the dialog are 'OK' and 'Cancel' buttons. Three callout boxes with information icons provide instructions: one points to the 'Name' field, another to the 'Expiry Date' field, and a third to the 'OK' button.

i Amend the Name if required

i Amend the Expiry Date if required

i Add a new document if required by attaching or dragging the file here

Once changes have been made please select 'OK' to save the changes

Editing a document

Changes are reflected in you document library



Your Business

Paul Szypulinski  
Yorkshire Purchasing Organisation

-  [About You](#) [Addresses](#) [Users](#) [What You Sell](#) [Documents](#) [Preferences](#) 

 Search  Add Document

Name	Type	Last Changed	Expires In	Visible to all Customers	Show Me
Tax Clearance Certificate	Generic Documents	12/01/2015 13:43:30	-		
ANDY TEST g	Matt	30/06/2011 16:16:32	Expired		
TEST IMAGE	Employers Liability Insurance Certificate	29/03/2011 11:49:13	Expired		

The file is added to your document library

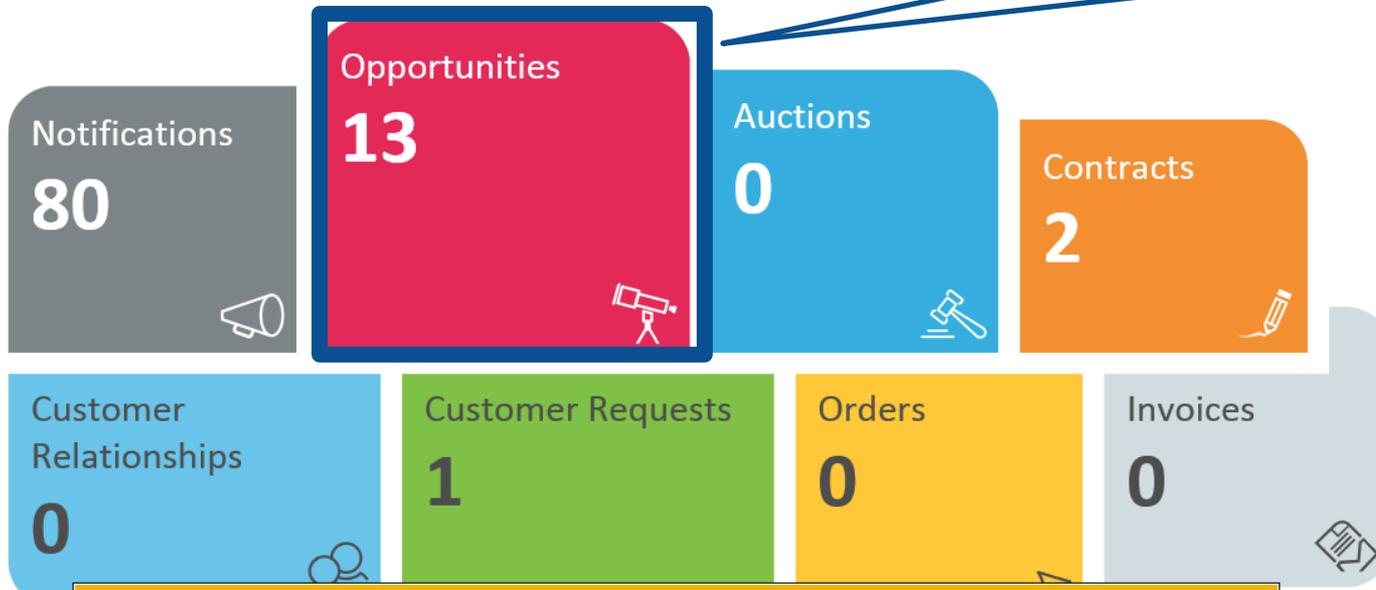
Accepting tender award

Once details are in order the contractor must reply to either the accept or reject the tender letter of offer as follows;

Select
'Opportunities
from the Supplier
Dashboard

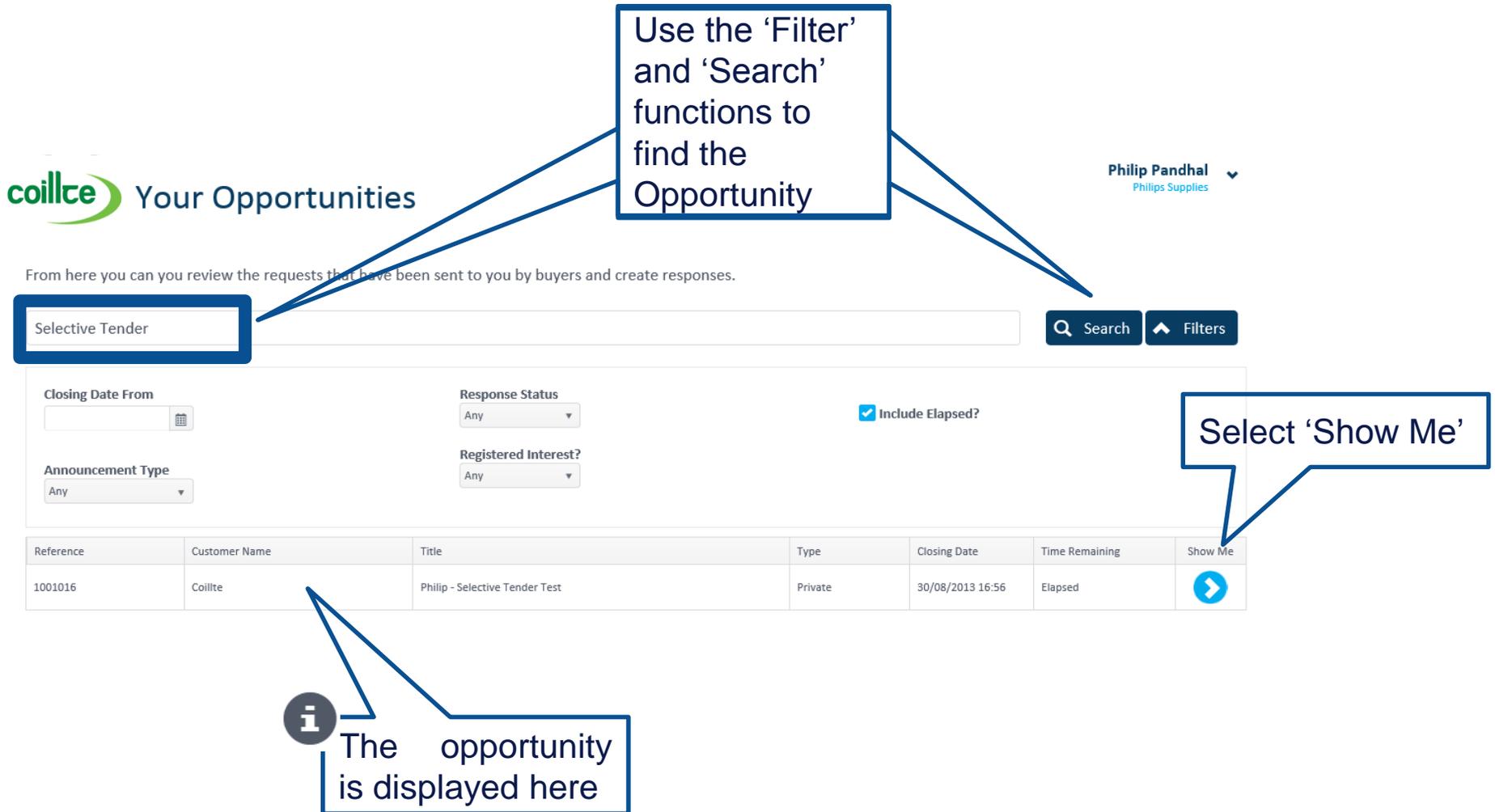
Philip Pan
Philips Su

 Your Portal



Accepting tender award

Find the Opportunity that you have been offered by Coillte



coillte Your Opportunities

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

Philip Pandhal
Philips Supplies

Selective Tender

Search Filters

Closing Date From
Response Status: Any
Registered Interest?: Any
Include Elapsed?

Announcement Type: Any

Select 'Show Me'

Reference	Customer Name	Title	Type	Closing Date	Time Remaining	Show Me
1001016	Coillte	Philip - Selective Tender Test	Private	30/08/2013 16:56	Elapsed	

i The opportunity is displayed here

Accepting tender award

Create a message



Your Response | 1001017

Messages

Select 'Message'

From here you can edit your response by completing the various steps within the wizard below, or process it using the options above.

General Items Questions Attachments

About You

Use this text area to provide more information about yourself

Request Overview

There are currently no messages between you and the buyer. Please enter a subject and text below to start a dialogue.

Subject

Selective tender for IT services

Text

Dear Coillte Category Manager
I would like to thank you for your email and take this opportunity to formally accept your offer
Kind Regards

Attach files ...or, drag and drop files here

Create your response indicating either acceptance or rejection

Files can be attached or 'dropped' here

Select 'Send Message'

Send Message Cancel

Accepting tender award

Messages

Selective tender for IT services

Started by Philip Pandhal

Posts for 'Selective tender for IT services'

18 December 2014 @ 10:17:02
Philip Pandhal, Philips Supplies

Dear Coillte Category Manager
I would like to thank you for your email and take this opportunity to formally accept your offer
Kind Regards
Phil

i Messages are displayed as a list and can viewed

i Messages are date and time stamped

Reply to Post

i Messages can be replied to here

Accepting / rejecting contract offer

The next step in the process is receiving an electronic copy of the contract on SMS.

A notification email will be received once the document is issued on SMS. The email contains a link to the system to log on.



Accepting / rejecting contract offer

Enter Notifications

Select
'Notifications'



Your Portal

Philip Pandhal
Philips Supplies

Notifications
81



Opportunities
13



Auctions
0



Contracts
2



Accepting / rejecting contract offer

The Notification will be displayed at the top of the list



Select 'Show Me'

Philip Pandhal
Philips Supplies

From here you can view your notifications and take action if needed.

Customer	Notification	Raised On	Show Me
Coillte	New Message Notification	18/12/2014 10:25:29	



Philip Pandhal
Philips Supplies

From here you can view your notifications and take action if needed.

Customer	Notification	Raised On	Show Me
Coillte	New Message Notification	18/12/2014 10:25:29	

New Message Notification

Contract 'PROACTIS Buyer Portal: <https://PlazaUAT.ProactisP2P.com/>'
You have a new message from '1001016'.

Select 'View'

Accepting / rejecting contract offer



Messages | [Contract K1000067](#)

Philip Pandhal
Philips Supplies

[← Contract](#) [+ Message](#)

From here you can view all dialogue you currently have with the buyer. You can reply to existing messages using the 'Reply to Post' field below, or add a new message by clicking the '+ Message' button above.

Messages

 K1401535 Philip Supplies Contractor Ltd

Started by Seamus Corry

Posts for 'K1401535 Philip Supplies Contractor Ltd'

18 December 2014 @ 10:25:27
Seamus Corry, Coillte

Dear Contractor,

I attach Contract number K1401535 for authorisation. If you the Supplier accept this contract form please click on REPLY option and insert into the dialogue box the following sentence:

"I hereby declare and confirm that I have read and (have the legal capacity and authority to) accept the (attached) contract Form, for and on behalf of the Supplier, pursuant to Coillte's terms and Conditions."

If you have any query regarding the contract please contact the Coillte Contract Manager Lorcan Harrison.

Thank You,
Philip
Coillte Contract Administration

Tip: You can copy and paste the legally accepted wording above to save you typing it all out.

 K1401535 Philip Supplies Ltd.pdf

Reply to Post

 Attach files ...or, drag and drop files here

Send

Review the message

Review your electronic copy of the contract (The attachment)

Accepting / rejecting contract offer

Reply indicating whether you accept or reject the contract offer

Reply to Post

To Coillte Contracts Authoriser
"I hereby declare and confirm that I have read and (have the legal capacity and authority to) accept the (attached) contract Form, for and on behalf of the Supplier, pursuant to Coillte's terms and Conditions."
Regards

 Attach files ...or, drag and drop files here

i
Files can be attached or 'dropped' here

 Send

Select to Send

Accepting / rejecting contract offer

Messages

 K1401535 Philip Supplies Contractor Ltd

Started by Seamus Corry

Posts for 'K1401535 Philip Supplies Contractor Ltd'

I attach Contract number K1401535 for authorisation. If you the Supplier accept this contract form please click on REPLY option and insert into the dialogue box the following sentence:

"I hereby declare and confirm that I have read and (have the legal capacity and authority to) accept the (attached) contract Form, for and on behalf of the Supplier, pursuant to Coillte's terms and Conditions."

If you have any query regarding the contract please contact the Coillte Contract Manager Lorcan Harrison.

Thank You,
Philip
Coillte Contract Administration

Tip: You can copy and paste the legally accepted wording above to save you typing it all out.

 K1401535 Philip Supplies Ltd.pdf

18 December 2014 @ 10:36:30
Philip Pandhal, Philips Supplies

To Coillte Contracts Authoriser
"I hereby declare and confirm that I have read and (have the legal capacity and authority to) accept the (attached) contract Form, for and on behalf of the Supplier, pursuant to Coillte's terms and Conditions."
Regards
Phil

 All messages are displayed as a list and can be viewed

 Messages can be replied to on screen

 Messages are date and time stamped

Next Steps

The contract will now go for internal approval at Coillte

Once the contract has been approved / rejected you will receive notification from the Category Manager informing you of the contract status

General Contract Management

The next section form you of the following;

- Reviewing your contract
- Contract Messages

General Contract Management

Review your contract

 Your Portal



Contract Management

Enter 'Contracts'

View all of your Contracts held within the PROACTIS Supplier Network

 Your Contracts

Philip Pandhal 
Philips Supplies

From here you can search for contracts that have been awarded to you by your customers.

 Search  Filters

Reference	Number	Contract Name	Customer Name	Value	Awarded Date	Status	Show Me
Test KJ	K1000092	Test KJ	Coillte	EUR 100.00	16/10/2013 17:00	Completed	
1001016	K1000067	Philip - Selective Tender Test	Coillte	EUR 10,100.00	02/09/2013 09:32	Active	

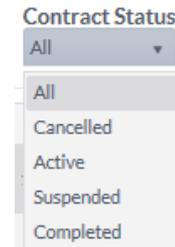
Contract Management

Search for your contract(s)

Enter a key search word and then click 'Search'

Click 'Filter' and use the parameters to search, then click 'Search'

Use the search and/or Filter function to find the Contract(s)



Sally Adams
AquaPoint Ltd

From here you can search for contracts that have been awarded to you by your customers.

Search by customer name, contract reference, name or number...

Search Filters

Contract Status

- All
- Cancelled
- Active
- Suspended
- Completed

Contract Name	Customer Name	Value	Awarded Date	Status	Show Me
VF TEST 2 - AquaPoint Ltd	Acme PLC	GBP 30.00	24/11/2014 11:58	Active	



Contracts are displayed including information such as the Reference, Number, Name, Customer, Date, Contract Status and Customer



'Contract Status' are controlled / owned by the Customer

Contract Management

Open the Contract



Sally Adams
AquaPoint Ltd

From here you can search for contracts that have been awarded to you by your customers.

 Search  Filters

Contract Status
All

Reference	Number	Contract Name	Customer Name	Value	Awarded Date	Status	Show Me
10077/R	30045/C	v5 TEST 2 - AquaPoint Ltd	Acme PLC	GBP 30.00	24/11/2014 11:58	Active	

Show Me


Once the Contract is displayed click 'Show Me'

Contract Management

Contract Details

Contract Status
All

Reference	Number	Contract Name	Customer Name	Value	Awarded Date	Status	Show Me
10077/R	30045/C	v5 TEST 2 - AquaPoint Ltd	Acme PLC	GBP 30.00	24/11/2014 11:58	Active	

Start Date
24 November 2014

Delivery Address
The Water Centre
York Road Business Park
Malton
YO17 6YD
UNITED KINGDOM

Purchasing Contact
Steve Adams

Contact Address
Acme Plc
Riverview Court
Castle Gate
Wetherby
North Yorkshire
LS22 6LE
UNITED KINGDOM

 Messages

Contract Details are displayed onscreen

Column headers such as Value, Status, Name, references etc. can be used to sort Contracts

Contract Dates, Contact(s), Delivery Address(es) and values are visible

Messages can be sent to the customer and are received from the customer specific to this contract

Contract Management

Contract Messages



To send or view messages specific to this contract click on 'Messages'



Messages | Contract 30045/C



New messages can be created

Previous messages can be viewed

From here you can view all dialogue you currently have with the buyer. You can reply to existing messages using the 'Reply to Post' field below, or add a new message by clicking the '+ Message' button above.

Messages

 Contract Dialogue
Started by Steve Adams

Posts for 'Contract Dialogue'

24 November 2014 @ 12:05:32
Steve Adams, Acme PLC

Well done See attachment

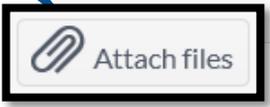
Rgds
Phil

 Internal.doc

Messages can be replied to

Files can be attached

Reply to Post



Click here to send files



- Registering on the Supplier Portal (Invited by Customer)
- Registering on the Supplier Portal (Self Registration)
- Changing my Organisation details
- Registering an interest in a tender opportunity
- Responding to a tender opportunity
- Locating / Amending a tender opportunity response
- Invoice Management
- Contract Management
- Password Management (Forgot or Amend)
- Frequently Asked Questions (FAQs)