



# PROACTIS: Supplier User Guide

Frequently Asked Questions (FAQ)

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This manual is intended for all potential and existing Supplier Network Users

Please familiarise yourself with the manual if you have any queries or questions related to the use of the PROACTIS Supplier Network

# Why PROACTIS

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- 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

Frequently Asked Questions contained within this manual are separated into the following sections;

1. Overview
2. Support
3. Notifications
4. Opportunities
5. Auctions
6. Contracts
7. Customers
8. Customer Requests
9. Password Policy

# 1. Overview

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## **Q1. Do I need special equipment to use the Supplier Network?**

A1. No special equipment or software is needed - just internet access. The portal works best on the following web browsers;

- Microsoft Internet Explorer 9, 10 and 11 (in compatibility mode)
- Google Chrome
- Safari
- Firefox

## **Q2. What is the Supplier Network and how does it work?**

A2. It is a cloud based service that creates an interface between buyers and its suppliers or those wishing to become suppliers. As it is web based it is available from anywhere where there is internet access

# 1. Overview

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## **Q3. Is it secure?**

A3. In meeting the ISO 27001 and ISO 9001 demands, PROACTIS demonstrates on-going commitment to the highest standards of security, risk and quality management processes. These certifications result from continuing commitment to secure the integrity of business-critical information, while maintaining a focus on PROACTIS' ability to meet customer requirements and continuously improve.

## **Q4. What do I do if I have a problem registering or inputting information on the system?**

A4. If you have any problems with the system then please email your customer specific PROACTIS support personnel

## 2. Support

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### **Q1. Do PROACTIS provide help on how to use the system?**

A1. Yes a number of manuals exist (displayed in the final page) which have been distributed to all customers.

Alternatively a number of videos exist which can be viewed on the Supplier Network

Tool tips exist in the product where you can hover over help icons

# 3. Notifications

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## **Q1. Why am I receiving notifications?**

A1. You are receiving notifications because when you registered you identified 'what you sell'. Notifications are a method of keeping you informed of opportunities that exist that you may be interested in.

## **Q2. How can I stop/update or amend notifications?**

A2 You can stop/update or amend notifications within the 'Your Business' area found on your Supplier Dashboard page. Please review your business roles, contacts and users to ensure the most suitable notifications are received by the appropriate personnel

# 4. Opportunities

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## Q1. What is an Opportunity?



A1. The PROACTIS Supplier Network is a multi-tenanted portal shared by organisations to advertise opportunities to tender for goods and services they may require. Opportunities are known by a number of names depending on the customer involved and in essence are the advertisement of works/goods and/or services that customers are seeking suppliers for. Some names used include Tenders, Solicitations, Requests for work, Pre-Qualifications, Requests for Information, Invitations to Tender.

As a supplier, you can register and respond to advertised opportunities for organisations using the portal.

# 4. Opportunities

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**Q2. I can't find an opportunity, but have received an email notifying me of one?**

A2. Please select the opportunity icon and then use the filter and search functions to search for all opportunities. If the Opportunity is not displayed please contact the customer who will be able to inform you of closing dates and where to access current opportunities

**Q3. How can I search for more opportunities?**

A3. Please select the opportunity icon and then use the filter and search functions to search for all opportunities.

# 4. Opportunities

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**Q4. Can I update/resubmit my response once it has been submitted?**

A4. If an opportunity can be resubmitted will vary on a tender by tender basis and will be detailed in the Request Overview 'Allow response re-submit before deadline?'

**Q5. Can I submit multiple responses?**

A5. It will vary per tender if multiple responses can be submitted. This will be detailed in the Request Overview 'Allow Multiple responses'

# 4. Opportunities

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**Q6. Will a tender opportunity response be automatically saved?**

A6. A tender opportunity response will be automatically saved every 5 minutes, alternatively the responses can be saved more regularly using the save button at the top of each page.

**Q7. Can I tell what the closing date of the opportunity is?**

A7. Yes, the closing date of the opportunity is shown along with a countdown showing the time remaining to respond.

# 4. Opportunities

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## **Q8. I can't submit my response?**

A8. Some of the information requested may be incomplete or require mandatory responses before tender submission. To highlight any issues press the validate button at the top of the page.

## **Q9. I can't upload a document to a tender response?**

A9. PROACTIS Supports a number of document extensions e.g. .doc, xlxs etc. Please ensure your document is of an acceptable type. If the document type is correct ensure the document size is accepted by the customer organisation

# 4. Opportunities

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**Q10. I want to upload a document that isn't one of the document types available?**

A10. You can only upload document(s) that have been requested by the customer.

**Q11. How do I view opportunities?**

A11. To view opportunities please click on the 'Opportunities' icon on you dashboard and search or filter if required. Alternatively on PROACTIS Login screen please click on the 'View Opportunities' arrow.

# 4. Opportunities

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## **Q12. How do I respond to a tender?**

A12. Please review the documentation attached to the tender, within the Request, as this will outline what is required. Alternatively please

## **Q13. Can I reselect my customers to ensure I only see relevant opportunities?**

A13. You can add customers by clicking on the 'Customers' icon and then the '+ Customers' button

## 4. Opportunities

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**Q14. I 'Withdraw' a registration of interest and it withdrew me without a warning message.**

A14. The system does contain a series of warning or prompt messages, however it is not advisable to pre-empt these. If you accidentally click 'withdraw' you can resubmit a registration of interest and a response to a tender at any time up until the closing date. Please ensure that you do not click 'Withdraw' unless you want to withdraw either a response or registration of interest

## 4. Opportunities

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**Q15. Can I add 'Add' or 'Amend' a user within my organisation?**

A15. You can 'Add' or 'Amend' users and organisation information by using the 'Your Business' Page, accessed from your dashboard

**Q16. Can I amend my prices?**

A16. Prices can be amended as can all responses up until the opportunity 'closing date'. Please navigate to 'Opportunities' and then specific opportunity. Click 'Show Me' and then amend the response prices and resubmit

## 4. Opportunities

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**Q17. How do I contact the buyer if I have a tender specific query?**

A17. Within the opportunity response click the 'Messages' button and create a message

**Q18. Where do we download the tender documents?**

A18. Within the opportunity response the tender documents are at the bottom of each screen within the 'Request Overview' and 'Request Documents' sections

## 4. Opportunities

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**Q19. Do I have to upload documents e.g. safety statements before the closing date of an opportunity?**

A19. Responses to opportunities in their entirety, including the upload of documents must be complete before the closing date (unless specifically stated by the customer). The system will not allow the upload of documents or alteration of responses after the closing date.

**Q20. I saved and completed my opportunity response but forgot to submit, does this eliminate me from the process?**

A20. If you have saved your responses and forgot to submit, before the closing date and time have passed, then you are eliminated from the process. If the closing date has passed you cannot submit the response.

# 4. Opportunities

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**Q21. Can I submit or send an opportunity response after the closing date?**

A21. Only responses submitted before the closing date and time can be entered into the system and accepted for evaluation purposes

**Q22. What do I do if I forgot my password?**

A22. If you forget your password please use the 'Forgotten Password' link on the PROACTIS home page where you will then be prompted to enter information that you set during your initial registration (below) Once this is complete half of your password will be sent via. email to you. Once this is received follow the on screen instructions

# 4. Opportunities

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**Q23. How long do opportunities/tenders sit on my opportunities page?**

A23. Tenders or opportunities will remain on your opportunities page until the tender has closed, or the date set by the customer. The opportunities page has a filter and search function which allow for the advanced search of opportunities.

**Q24. Why do I have to register an interest?**

A24. You may have to register interest in an opportunity as you have not been directly invited. The registration process allows customers to capture information on organisations interested in providing services to them and also allows the suppliers to view opportunities without formally submitting a response.

# 5. E-Auctions

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## **Q1. I don't have any auctions?**

A1. Auctions run on the supplier network will be part of an opportunity to tender, run by the customer organisation. If you have not responded to a tender and been notified that you will be taking part in an auction. You will not see any auctions listed.

## **Q2. I don't want to be part of the auction?**

A2. The Customer organisation determines whether each Opportunity incorporates an auction, any queries or discrepancies should be notified to the customer organisation

## 5. E-Auctions

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**Q3. My bid is lower than another supplier why am I not ranked 1<sup>st</sup>?**

A3. The auction may be a price/quality auction so you are being evaluated based on both aspects on just price alone.

**Q4. How can I communicate with customers when the auction is underway?**

A4. Message functionality is available in the system where you can initiate a message to the customer.

# 6. Contracts

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## **Q1. I don't have any contracts listed?**

A1. Please use the search and filter function to find your contracts. If you do not have any contracts that have been activated using PROACTIS then no contracts will be displayed. Please contact the customer organisation with whom you have the contract.

## **Q2. How do I clarify details of the contract(s) listed?**

A2.If you select a contract, you can view the details by clicking 'Show Me'. Alternatively you can contact the customer organisation with whom you have the contract and they can direct you to the full contract details

# 6. Contracts

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## **Q3. How do I remove the contracts listed?**

A3. Contracts can only be removed by the customer organisation with whom you have the contract. If you would like to remove a contract please contact the customer organisation who can do this for you.

## **Q4. Can I communicate with the customer regarding a contract?**

A4. Yes, using the message functionality available within each specific contract.

# 7. Customers

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## **Q1. My customers are not listed?**

A1. Please use the search function within the customers section to find your customers. If your customers are still not displayed you can add a customer by using the '+ Customer' button on the right hand side of the screen

## **Q2. Why is the status not reviewed, when will it be reviewed?**

A2. The status is not reviewed because the customer organisation has not had the opportunity to review your registration or response to engagement. The status remains as reviewed until the customer organisation alters this to reviewed.

# 7. Customers

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**Q3. The status is reviewed, what does this mean?**

A3. The status of reviewed means that the customer organisation has had the opportunity to review your organisation details submitted

**Q4. Is there a limit to the amount of users I can have?**

A4. No there is no limit to the amount of users

# 7. Customers

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**Q5. What is the difference between a General Contact, e-Procurement contact, sales contact, Payment contact?**

A5. Contact types can be defined within your organisation, to ensure that only relevant notifications and communications are received. The division of contacts assists in ensuring accountability and segregation are visible and maintained.

Please see the next page for more detail on Contact types

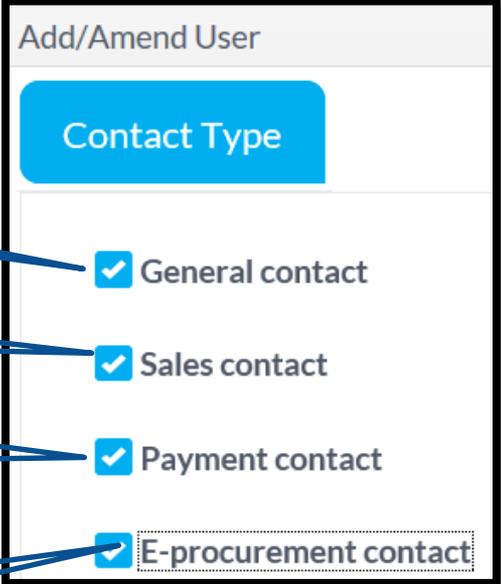
# 7. Customers

**General:** A mandatory selection to ensure you receive generic system communications

**Sales:** Users are notified when Requests are issued, or dates change and when a trading relationship or your supplier record is amended

**Payment:** Users in this category are notified of e-invoice communications

**E-Procurement:** Users are notified of new dialogue and notifications from Customer when participating in Opportunities.



The screenshot shows a web interface titled "Add/Amend User". Below the title is a blue button labeled "Contact Type". Underneath, there is a list of four contact types, each with a blue checkmark in a box to its left:

- General contact
- Sales contact
- Payment contact
- E-procurement contact

Blue lines connect the text boxes on the left to the corresponding checkmarks in the screenshot.

## Q6. How can I contact my customer through the system?

A6. Messages can be sent to customers when responding to an opportunity using the messages button. Messages can also be sent within the contracts screen.

# 8. Customer Requests

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## **Q1. What is a customer request?**

A1. A request from a customer organisation to create a relationship with you. The request can take several forms including to initially engage, to obtain more specific information about your organisation or to complete surveys and reviews.

## **Q2. Response is started but I can't find it?**

A2. Please click on the requests icon on your supplier dashboard, you can search for your requests and amend or submit these from here.

# 8. Customer Requests

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**Q3. The request is not approved, who approves it and when will they approve it?**

A3. The customer organisation approves the request once it has been received and reviewed. Depending on the customer organisation requests may be approved immediately or take some time

# 9. Password Policy

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## **Q1. What is the password policy for a users login?**

A1. Passwords must be between 6 and 50 characters in length. It must contain at least 2 number(s).

## **Q2. How can I change my password?**

A2. Access 'Your Business' section and then select 'Your Users'. Use the 'Action icon to enter the user details tab where passwords can be changed

For further details on password management please see the PROACTIS supplier user guide 'Password Management'

- 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)