



# **PROACTIS:** **Supplier User Guide**

Registering on the Supplier Portal  
(Self Registration)

- Introduction
- Why PROACTIS
- Getting Started
- Registration Options
- Self Registration
- PROACTIS Supplier Manuals

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

Instructions are provided on how to register on the Supplier Portal

Please familiarise yourself with the manual prior to registration

- 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

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

## Self Registration – WHY?

I have **not** been invited to join the Supplier Network but would like 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

# TYPE B: I have not been invited

Copy / type the link into your internet browser

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

To enter the PROACTIS Supplier Portal

Feel free to  
view public  
opportunities



Sign In

Organisation ID

Login Name

Password

[View Opportunities](#)

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

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

Have you been invited?

Access Code

[Go](#)

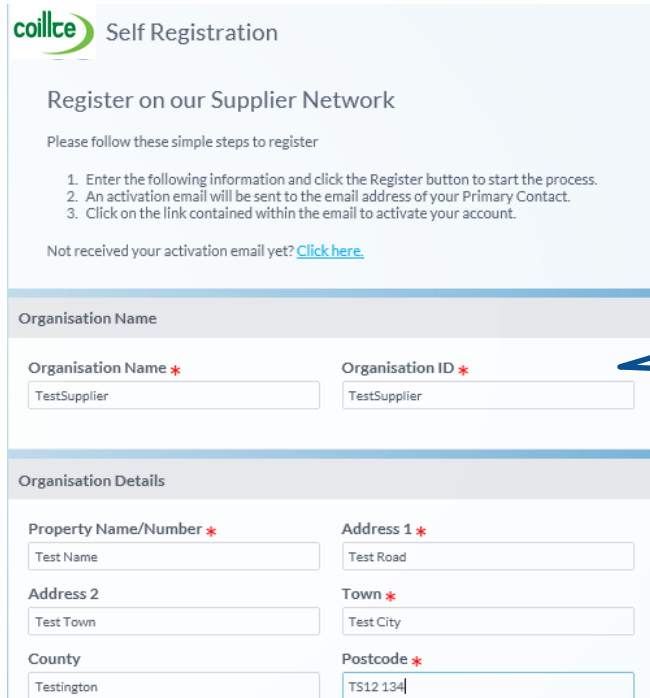
Powered by **PROACTIS**  
The Spend Control Company

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

Click Sign up

# TYPE B: I have not been invited

## Complete Initial Registration Steps



**coillce** Self Registration

Register on our Supplier Network

Please follow these simple steps to register

1. Enter the following information and click the Register button to start the process.
2. An activation email will be sent to the email address of your Primary Contact.
3. Click on the link contained within the email to activate your account.

Not received your activation email yet? [Click here.](#)

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**Organisation Name**

Organisation Name *	Organisation ID *
<input type="text" value="TestSupplier"/>	<input type="text" value="TestSupplier"/>

---

**Organisation Details**

Property Name/Number *	Address 1 *
<input type="text" value="Test Name"/>	<input type="text" value="Test Road"/>
Address 2	Town *
<input type="text" value="Test Town"/>	<input type="text" value="Test City"/>
County	Postcode *
<input type="text" value="Testington"/>	<input type="text" value="TS12 134"/>

Complete initial registration steps – to allow an activation email to be sent

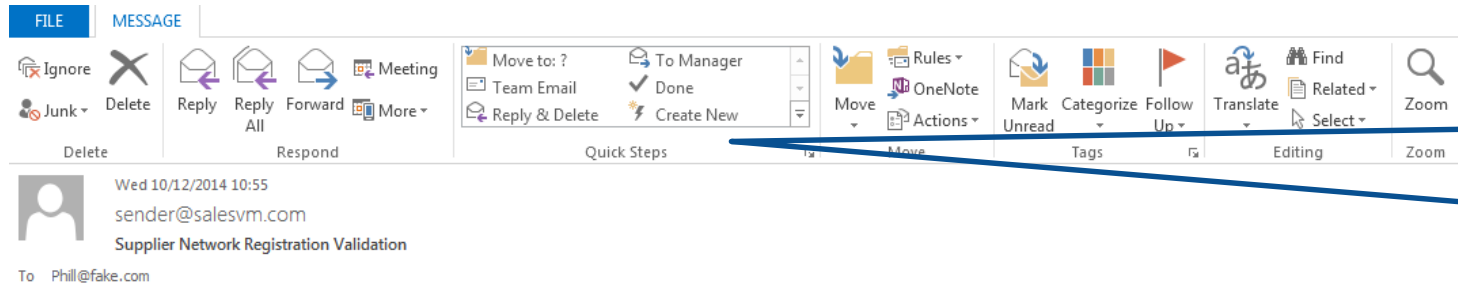
Enter the requested details

**i** Initial registration requests that you input some memorable information that will be used if you need to reset your password.

**i** Fields depicting a “\*” are mandatory and must be complete



# TYPE B: I have not been invited



Once activation is confirmed on screen an email is received

You have been sent this email because your Organisation has requested to be registered on the Supplier Network website. You must use the link below to activate your account within 24 hours from the time the you submitted your Registration Request.

The details entered were:

Organisation ID: TESTSUPPLIER  
Organisation Name: TestSupplier  
Primary Contact Name: Test Test  
Login Name: ADMIN  
Temporary Password: 7Ym-n6+PW!  
Supplier Network website URL: <http://localhost:8080/>

[Click here to activate your account](#)

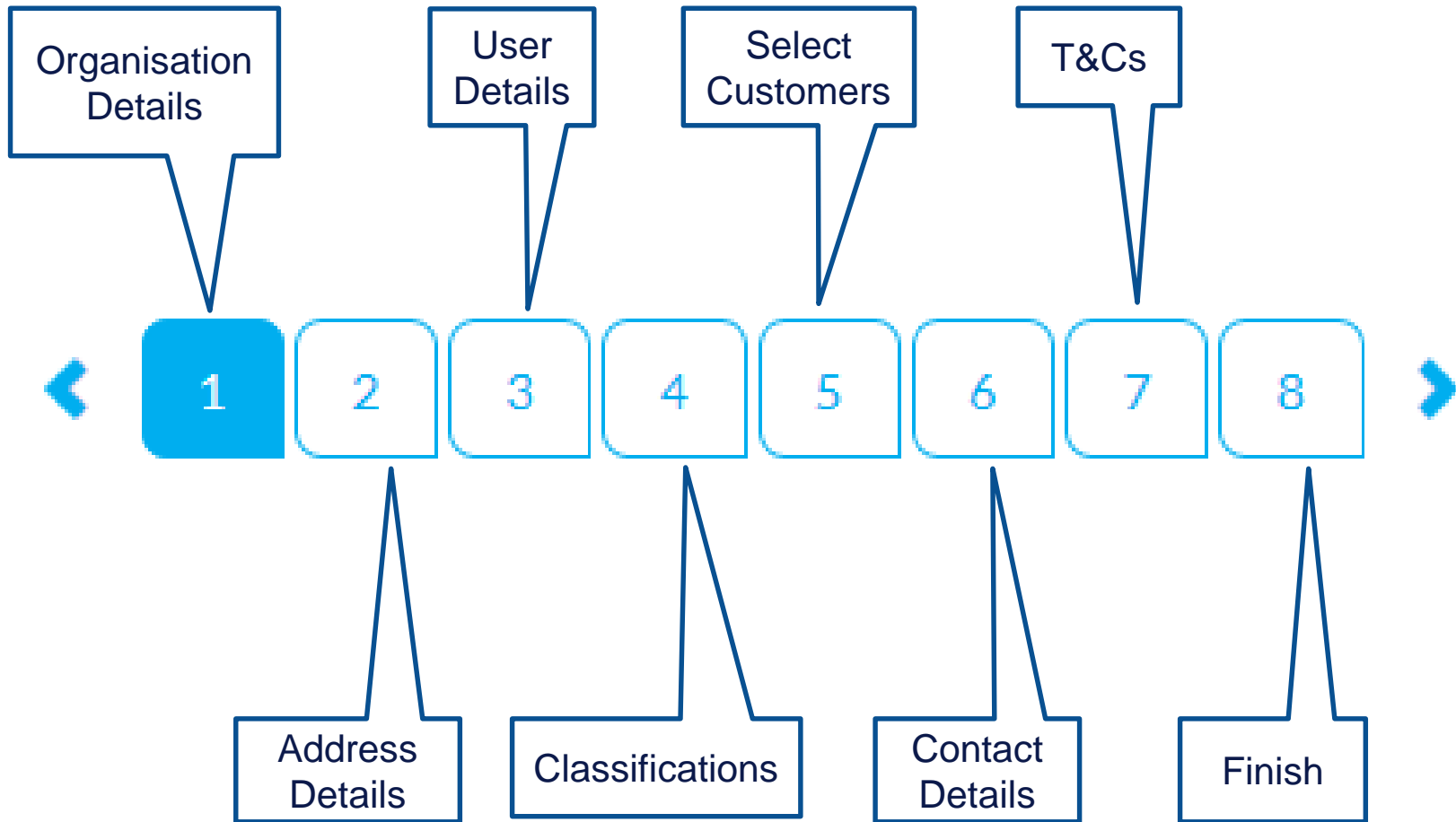


The email contains your new organisational details and a temporary password. Please keep this email until you have successfully registered

Click the link to activate your account

# TYPE B: I have not been invited

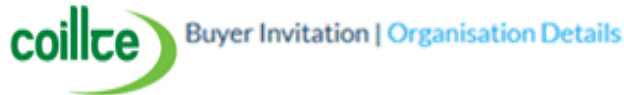
Self Registration requires the completion of 8 simple steps



# TYPE B: I have not been invited

## Step One: Organisation Details

Step One requires the population of a number of fields related to your organisation



Documents (1)

Name	Type
T&Cs	Terms and Conditions of Supply

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

Other Organisation Categories ⓘ


- Small Or Medium Sized Enterprise

**i** Fields depicting a '\*' are mandatory and must be complete

# TYPE B: I have not been invited

## Step Two: Address Details

Step Two requires the entry of address details and types for your organisation

 Buyer Invitation | Address Details



Organisation Addresses		
Address	Enabled	Action
85 Test Road, Test Town, Test City, Testington, T21 0BB, UNITED KINGDOM	<input checked="" type="checkbox"/>	

[+ Add Address](#)



You can amend these at any point in time by selecting 'Your Business' once you have registered


Click the pencil icon to amend the general (registered company address)

Addresses can be added here


# TYPE B: I have not been invited

## Step Three: Add / Amend User Details

Step Three requires the entry of user address details for your organisation

 Buyer Invitation | User Details




Organisation Users							
Login Name	Full Name	Email Address	General Contact	e-Procurement Contact	Sales Contact	Payment Contact	Action
ADMIN	Philip Test	sender@salesvm.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

 Add User

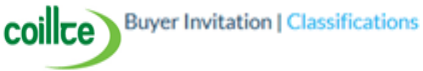
Click the Pencil icon to amend the ADMIN user details

Users can be added here

 You should specify the type of contact the user is. It will be your responsibility for the maintenance of any users. If a user leaves your company you will need to ensure you disable their account.

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## Step Four: Add Classifications



Step Four requires the addition of product/service classifications

Professional Ser

- 66339400 : Professional liability insurance services.
- 72590000 : Computer-related professional services.
- 74000000 : Architectural, engineering, construction, legal, accounting and other professional services.
- 76100000 : Professional services for the gas industry.
- 76200000 : Professional services for the oil industry.
- 91100000 : Services furnished by business, professional and specialist organisations.
- 91120000 : Services furnished by professional organisations.

- 13000000 : Metal ores.
- 14000000 : Mining, quarrying and other associated products.
- 15000000 : Food products and beverages.
- 16000000 : Tobacco, tobacco goods and substitutes.
- 17000000 : Textiles and textile articles.
- 18000000 : Clothing and accessories.
- 19000000 : Leather, leather products and footwear.
- 20000000 : Wood, wood products, cork products, basketware and wickerwork.
- 21000000 : Various types of pulp, paper and paper products.
- 22000000 : Various types of printed matter and articles for printing.
- 23000000 : Petroleum products and fuels.

Added




Selections can be made / amended using the arrows

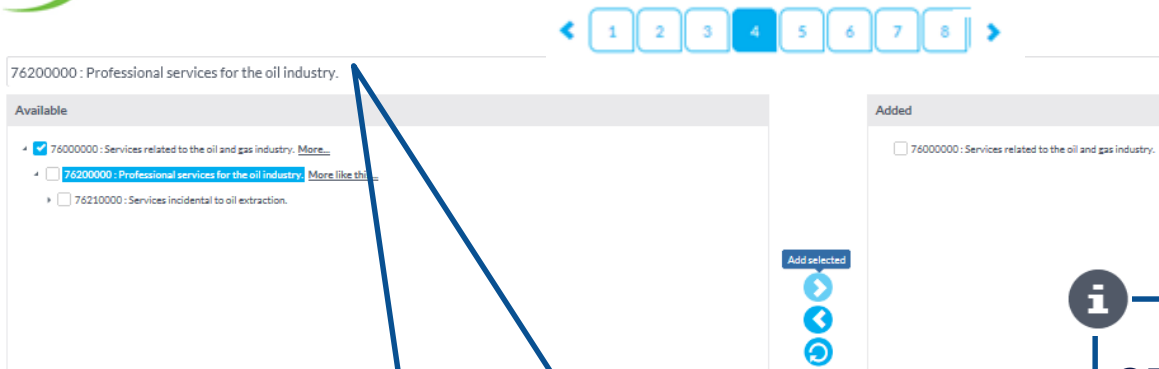
**i** You **MUST** select at least one product classification; you can always enter more or deselect classifications within the supplier portal. This information will be used to match you to relevant opportunities therefore try to be as accurate as you can when selecting product classifications.

# TYPE B: I have not been invited

## Step Four Continued: Add Classifications

Step Four requires the addition of product/service classifications

 Buyer Invitation | Classifications



You can enter a keyword into the search function and the system will return all codes containing that word. Please select the most appropriate

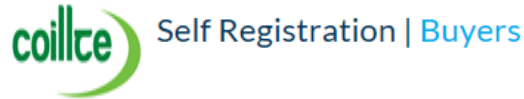


CPV codes are designed to help procurement personnel to classify their contracts consistently and correctly and to help suppliers find the notices which are of interest to them by using a standardised vocabulary.

# TYPE B: I have not been invited

## Step Five: Select Buyers (Customers)

Step Five requires the addition/selection of organisations that you want to do business with



456456 456  
41545



### Select Buyer Organisations

Title ▼	Town	Post Code	County	Country	
Acme PLC		LS22 6LE	North Yorkshire	UNITED KINGDOM	<input type="checkbox"/>

To select please tick the box on the right hand side of the screen



Once selected you will be notified of opportunities from these organisations for the products/services that you specifically provide



# TYPE B: I have not been invited

## Step Six: Primary Contact Details

Step Six requires you to review your personal details and update these

 Self Registration | Primary Contact Details



### Primary Contact Details

**Organisation Name**

Test Supplier PASP

**Login Name**

ADMIN

**First Name \***

!

**Surname \***

1

**Email Address: \***

clairereceive@proactitest.info

**Telephone Number \***

1

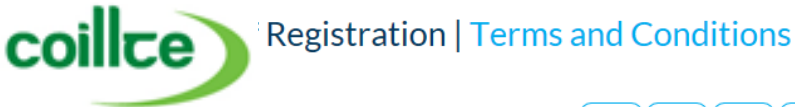


Please ensure data entered is accurate as this will be used for correspondence and so notification of opportunities

# TYPE B: I have not been invited

## Step Seven: PROACTIS Terms & Conditions

Step Seven requires you to review the PROACTIS User License



Test Supplier PASP

### 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.

4. DEFINITIONS AND INTERPRETATION

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

Once reviewed please select the box to proceed



If you would like further information on PROACTIS then please visit their website

<http://www.proactis.com/>

# TYPE B: I have not been invited

## Step Eight: Finish

Step Eight requires you to review your Organisation ID and enter a password



Self Registration | Finish


!1  
Test Supplier PASP



### Your Login Details

Organisation Name

Test Supplier PASP

New Password \* 

Organisation ID

TSP123

Repeat Password

Login Name

ADMIN



Please take note of your;

- Organisation ID,
- Username,
- **Password,**

as these will be required to Log In in the future

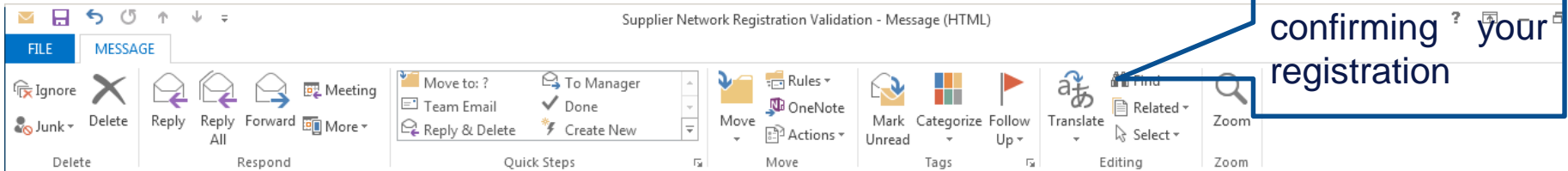
 Complete Registration

Once complete please select 'Complete Registration'

# TYPE B: I have not been invited

## Email Received:

An email is received confirming your registration



Wed 10/12/2014 10:41  
sender@salesvm.com  
Supplier Network Registration Validation  
To: Phill@fake.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: PTESTSUPPLIER  
Organisation Name: Phils Supplier  
Primary Contact Name: Philip Test  
Login Name: ADMIN  
Supplier Network website URL: <http://localhost:8080/?cid=ACME>

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

**i** Please keep this email as it contains your sign in details

**i** Click on the link to enter the Supplier Portal

- 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)