



# PROACTIS: Supplier User Guide

Responding to a tender opportunity

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# Introduction

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

Instructions are provided on how to submit a response to a Tender Opportunity \*

Please familiarise yourself with the manual prior to creating a response to a tender opportunity

\*Please Note: If you have not been directly invited (by email) you must Register an interest first

# 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

# Responding to a Tender Opportunity

If you have not been directly invited you must Register an interest before responding

For further support please see the PROACTIS Supplier Guide



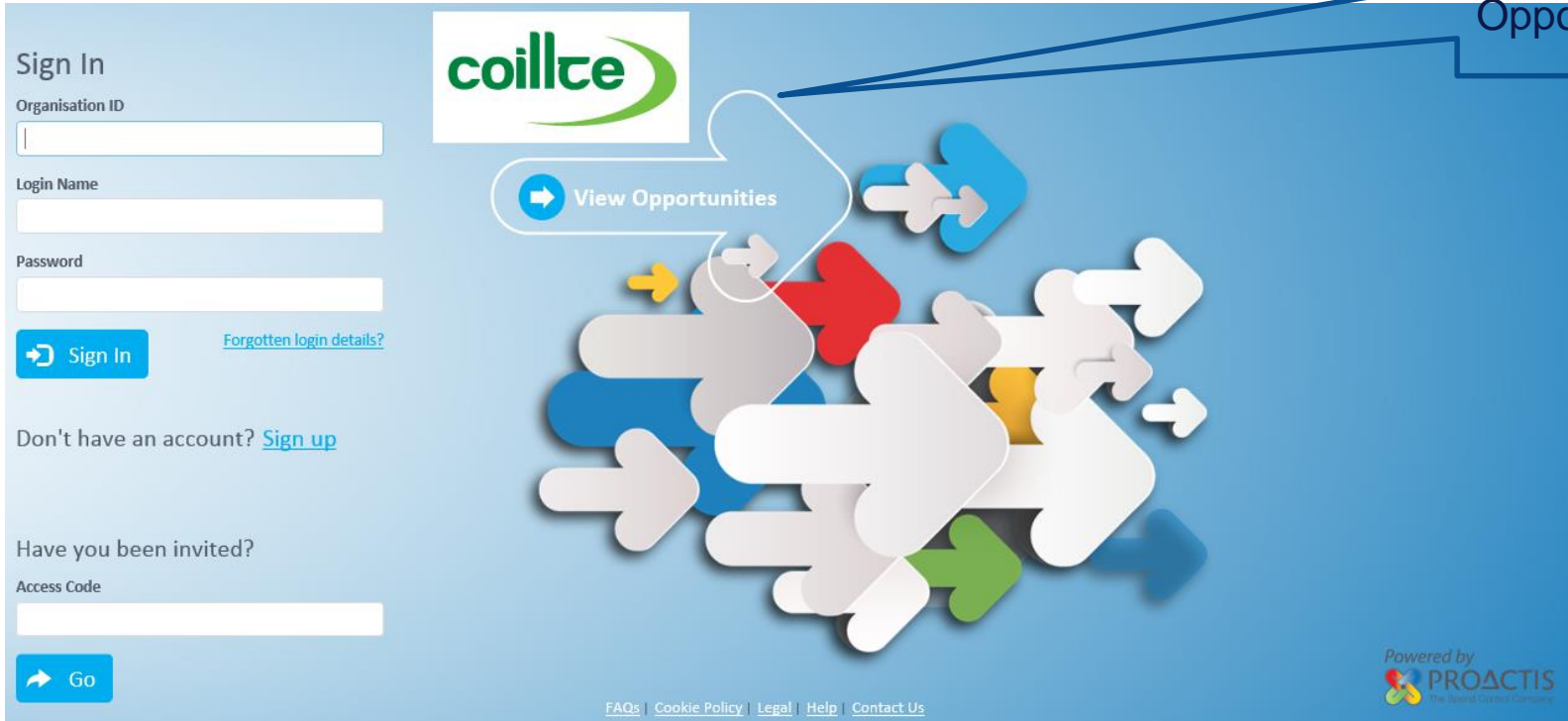
# Responding to a Tender Opportunity

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

[Forgotten login details?](#)

[Sign In](#)

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

Have you been invited?

Access Code

[Go](#)

**coillte**

[View Opportunities](#)

Powered by **PROACTIS**  
The Spend Control Company

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

# Responding to a Tender Opportunity

## Step One: Sign In

Step One requires you to sign into the Supplier Portal



The image shows a screenshot of the coillte Supplier Portal sign-in page. The page features the coillte logo at the top left. Below the logo is a 'View Opportunities' button with a blue arrow icon. The main content area is a light blue background with a cluster of colorful arrows (white, blue, red, yellow, green) pointing in various directions. A blue callout box on the right side of the page points to the 'View Opportunities' button and contains the text 'Step One requires you to sign into the Supplier Portal'. Another blue callout box on the left side of the page points to the sign-in form and contains the text 'Step One: Sign In'. The sign-in form is a light blue box with the following fields and buttons:

- Sign In
- Organisation ID
- Login Name
- Password
- Sign In button (with a blue arrow icon)
- [Forgotten login details?](#)

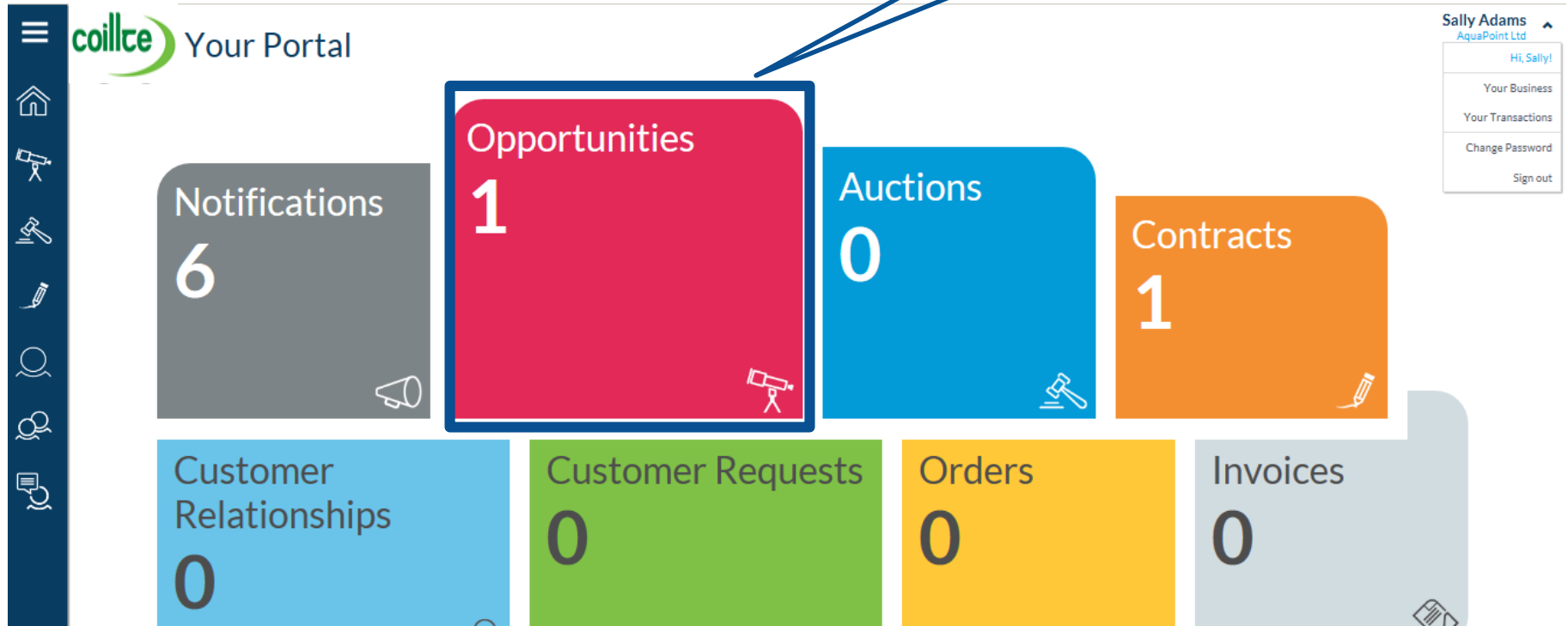
Below the sign-in form, there are links for 'Don't have an account? [Sign up](#)' and 'Have you been invited? Access Code' with a 'Go' button. At the bottom of the page, there are links for [FAQs](#), [Cookie Policy](#), [Legal](#), [Help](#), and [Contact Us](#).



# Responding to a Tender Opportunity

## Step Two: Enter 'Opportunities'

Click Opportunities to view all Opportunities available to you



The screenshot shows the 'coillce Your Portal' interface. A vertical sidebar on the left contains navigation icons. The main dashboard features several colored tiles representing different metrics:

- Notifications:** 6 (grey tile)
- Opportunities:** 1 (red tile, highlighted with a blue border and callout box)
- Auctions:** 0 (blue tile)
- Contracts:** 1 (orange tile)
- Customer Relationships:** 0 (light blue tile)
- Customer Requests:** 0 (green tile)
- Orders:** 0 (yellow tile)
- Invoices:** 0 (light grey tile)

In the top right corner, a user profile for 'Sally Adams' (AquaPoint Ltd) is visible, with options for 'Hi, Sally!', 'Your Business', 'Your Transactions', 'Change Password', and 'Sign out'.


# Responding to a Tender Opportunity

## Step Three: Find the Opportunity

Enter a key search word and then click 'Search'

Click 'Filter' and enter parameters to search, then click 'Search'

Use the search and/or Filter function to find the opportunity.

 Your Opportunities

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

Search by customer reference, title or customer name...

 Search  Filters



Closing Date From

Response Status

Include Elapsed?

Announcement Type

Registered Interest?

Reference	Customer Name	Title	Type	Closing Date	Time Remaining	Show Me
20054/T	Acme PLC	FAQ	Advertised	15/12/2014 00:00	3 days 12 hours	
10081/R	Acme PLC	Phil Entity Test	Private	17/12/2014 12:00	6 days 0 hours	

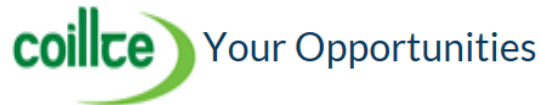
i

Opportunities are displayed including information such as the Customer, Type of Opportunity, Closing date, Time remaining and Opportunity title

Sally Adams  
AquaPoint Ltd

# Responding to a Tender Opportunity

## Step Four: Open the Opportunity





Sally Adams  
AquaPoint Ltd

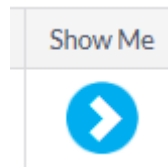
From here you can review the requests that have been sent to you by buyers and create responses.

Search by customer reference, title or customer name...

Search Filters

Reference	Customer Name	Title	Type	Closing Date	Time Remaining	Show Me
10081/R	Acme PLC	Phil Entity Test	Private	17/12/2014 12:00	5 days 19 hours	
20054/T	Acme PLC	FAQ	Private	18/12/2014 12:00	6 days 19 hours	

Once the tender opportunity is displayed click 'Show Me'




# Responding to a Tender Opportunity

## Step Five: Review the Tender Opportunity

Review the requested items and questions selecting the buttons at the top of the screen

Review the tender 'Request' overview

Review the tender 'Request' Documents

 Your Response | 10083/R

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

About You

Use this text area to provide more information about yourself



Request Overview

Request | 10081/R

Customer Name Acme PLC	Allow multiple responses? No
Title Phil Entity Test	Allow response re-submit before deadline? No
Description Phil Entity Test	Delivery Date 20 December 2014
Closing Date 17 December 2014 @ 12:00:00	Delivery Address Acme Plc Riverview Court Castle Gate

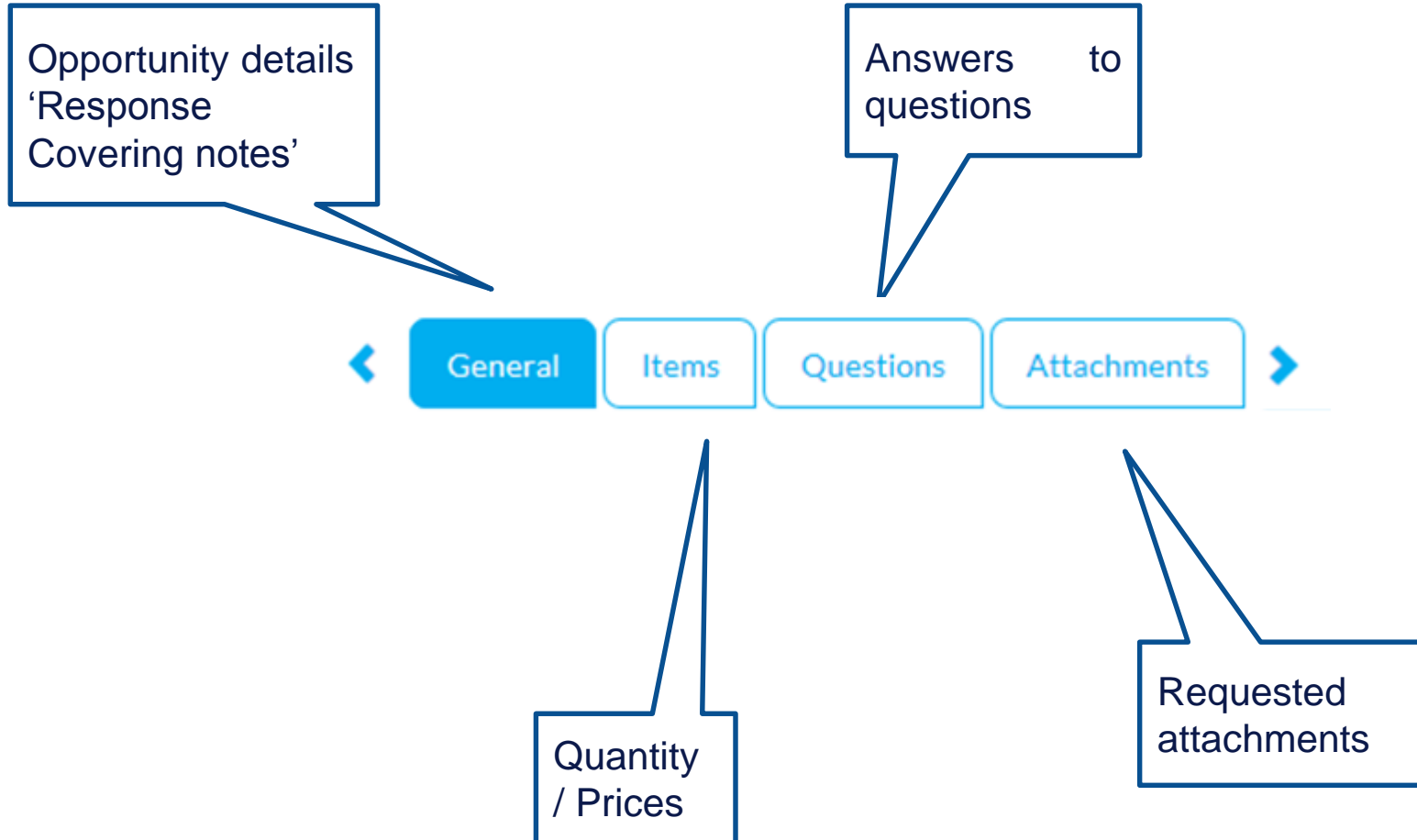
Request Documents (2)

Please read these documents. They are important specifications and/or requirements.

Name	Type	Download
Legal Statement	Generic Documents	
Privacy Statement	Generic Documents	

# Responding to a Tender Opportunity

## Step Six: Create a response



# Responding to a Tender Opportunity

## Step Six: General Continued..

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

The General Tab allows you to enter a general note to the potential customer

**i** Entering text here is not mandatory

**i** Data entered is not scored and may be in the form of a covering letter

# Responding to a Tender Opportunity

## Step Seven: Items



Items are individual works / goods / services that you are to provide a price for

Ref	Part Number	Name	UOM	Unit Price (GBP)	Quantity Requested	Quantity Supplying	Value (GBP)	Free Issue?
#1	1	1	Each	10	1	1	10	<input type="checkbox"/>
#2	2	2	Each	10	2	2	20	<input type="checkbox"/>

Lot 1 | Default

1 - 2 of 2 Items

Lot 2 | Lot 2

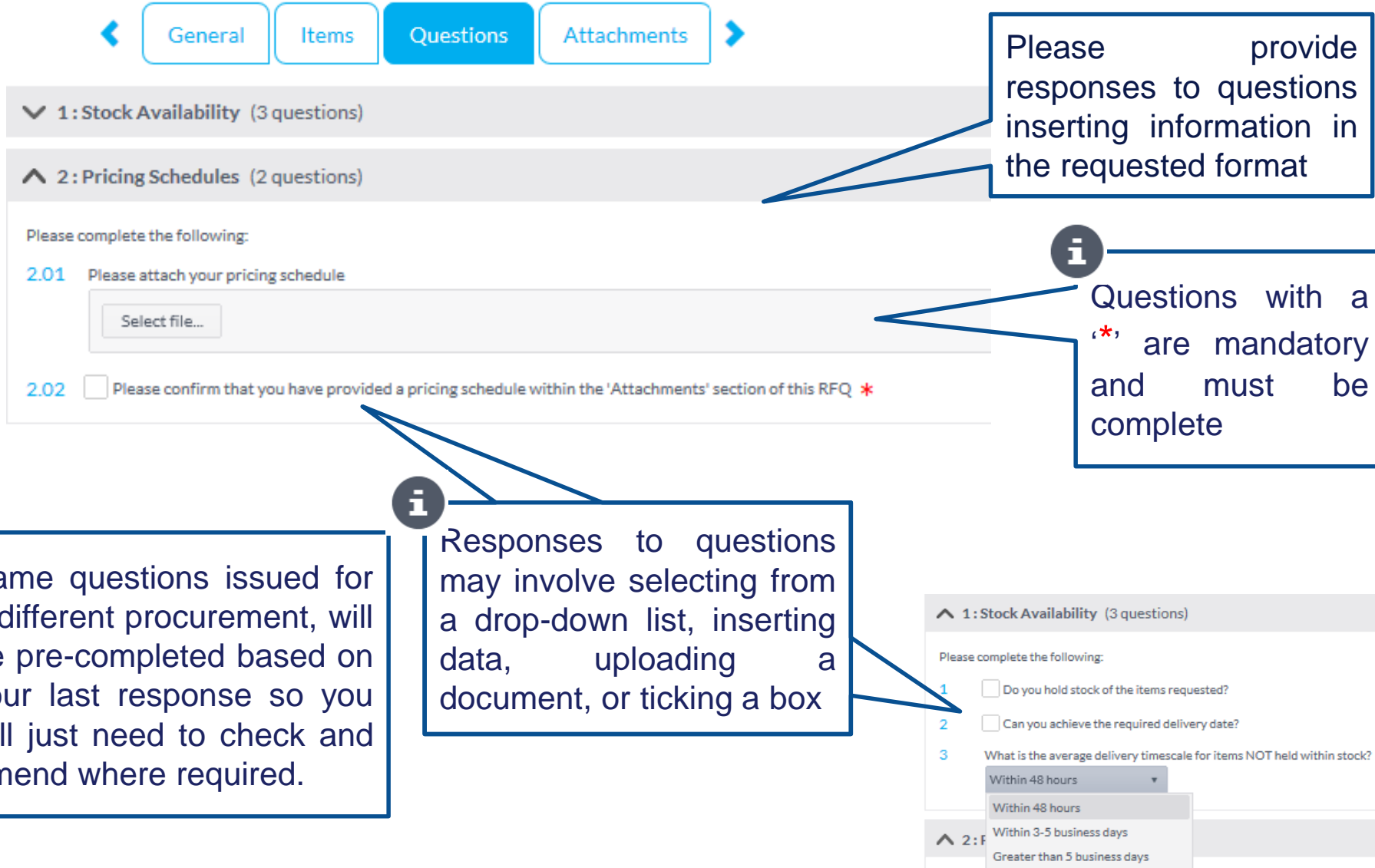
There may be several Lots, you must select which LOT(s) you are interested in supplying. Prices must be entered for each LOT

Insert the unit price for each item. The value will be calculated automatically

Use the 'Free Issue' ONLY box to indicate that you are willing to provide the service / goods / works free (at no charge)

# Responding to a Tender Opportunity

## Step Eight: Questions



Please provide responses to questions inserting information in the requested format

Questions with a '\*' are mandatory and must be complete

Responses to questions may involve selecting from a drop-down list, inserting data, uploading a document, or ticking a box

Same questions issued for a different procurement, will be pre-completed based on your last response so you will just need to check and amend where required.

1: Stock Availability (3 questions)

2: Pricing Schedules (2 questions)

Please complete the following:

2.01 Please attach your pricing schedule

Select file...

2.02  Please confirm that you have provided a pricing schedule within the 'Attachments' section of this RFQ \*

1: Stock Availability (3 questions)

Please complete the following:

1  Do you hold stock of the items requested?

2  Can you achieve the required delivery date?

3 What is the average delivery timescale for items NOT held within stock?

Within 48 hours

Within 48 hours

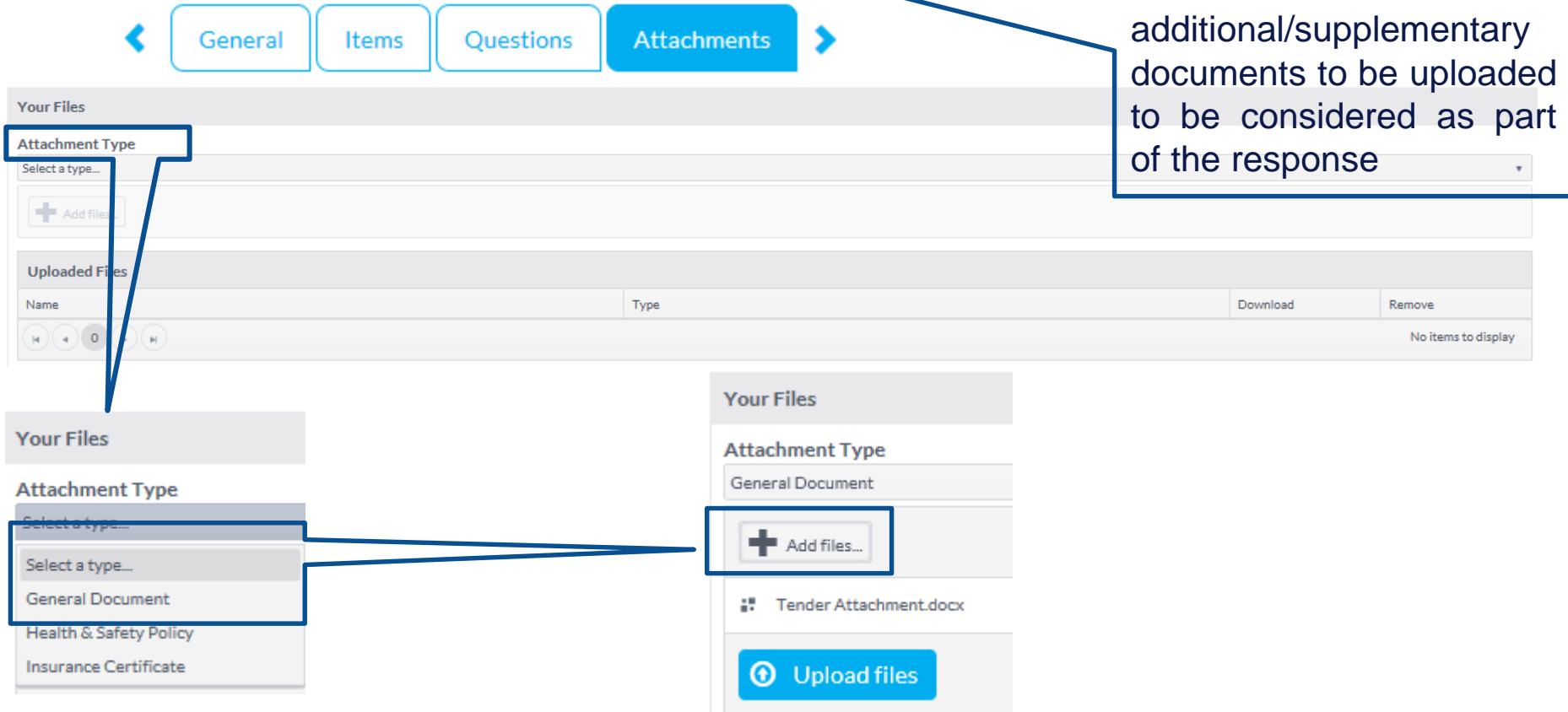
Within 3-5 business days

Greater than 5 business days



# Responding to a Tender Opportunity

## Step Nine: Attachments



Attachments allows for additional/supplementary documents to be uploaded to be considered as part of the response

**Your Files**

**Attachment Type**  
Select a type...

+ Add files...

**Uploaded Files**

Name	Type	Download	Remove
No items to display			

**Your Files**

**Attachment Type**  
General Document

+ Add files...

Tender Attachment.docx

Upload files

**Your Files**

**Attachment Type**  
Select a type...

Select a type...

- General Document
- Health & Safety Policy
- Insurance Certificate

Select Attachment Type

Select 'Add File'

# Responding to a Tender Opportunity

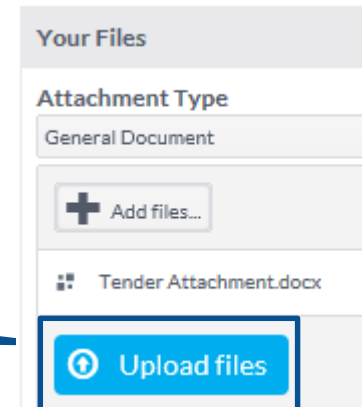
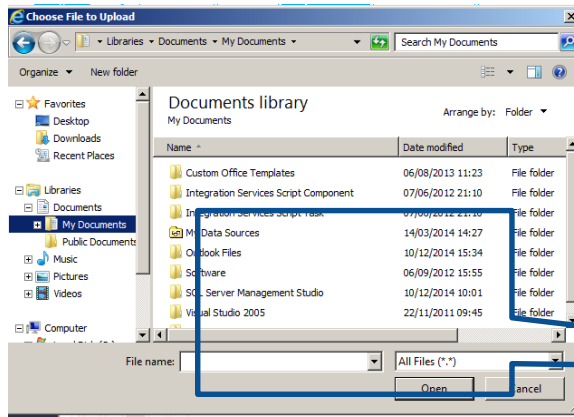
## Step Nine: Attachments continued..



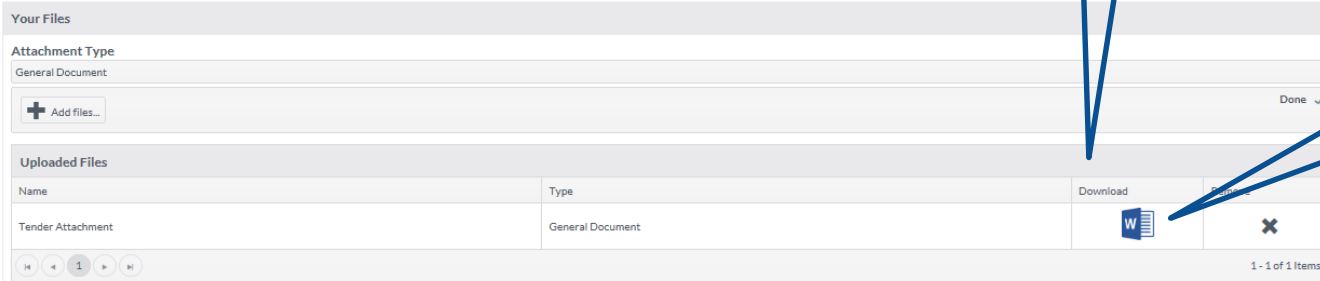
Choose the file to add

Click 'Upload File'

Added file is displayed on screen



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



Added file displayed on screen

# Responding to a Tender Opportunity

- Message to Customer



Your Response | 20057/T

Messages

To create a message to your customer click on 'Messages'

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

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

Subject

Tender Clarification Question 1.01

Text

Hi ACME plc

In relation to question 1.01 what is meant by the statement 'The supplier must provide all services dirt cheap'

Attach files

Send Message

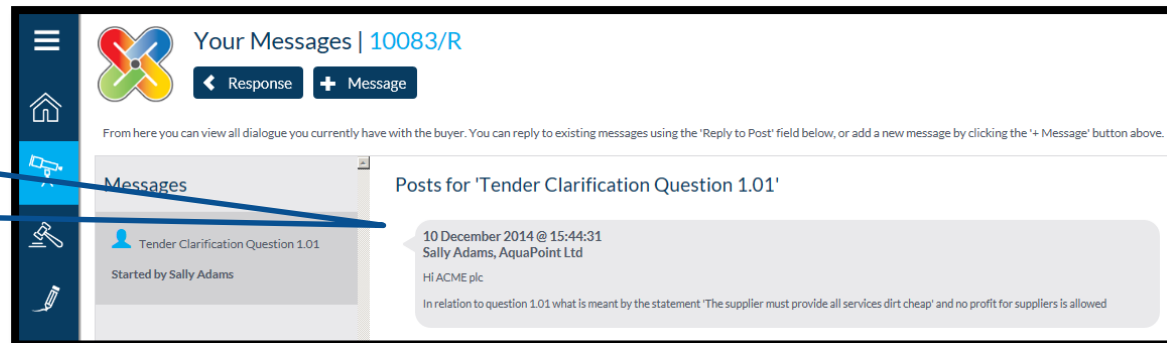
Cancel

Enter a subject and your message

Files can be attached to messages, if required

Click to Send Message

Message history displayed on screen



Your Messages | 10083/R

Response 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


Tender Clarification Question 1.01  
Started by Sally Adams

Posts for 'Tender Clarification Question 1.01'

10 December 2014 @ 15:44:31  
Sally Adams, AquaPoint Ltd  
Hi ACME plc  
In relation to question 1.01 what is meant by the statement 'The supplier must provide all services dirt cheap' and no profit for suppliers is allowed

# Responding to a Tender Opportunity

## Step Ten: Validate and Save



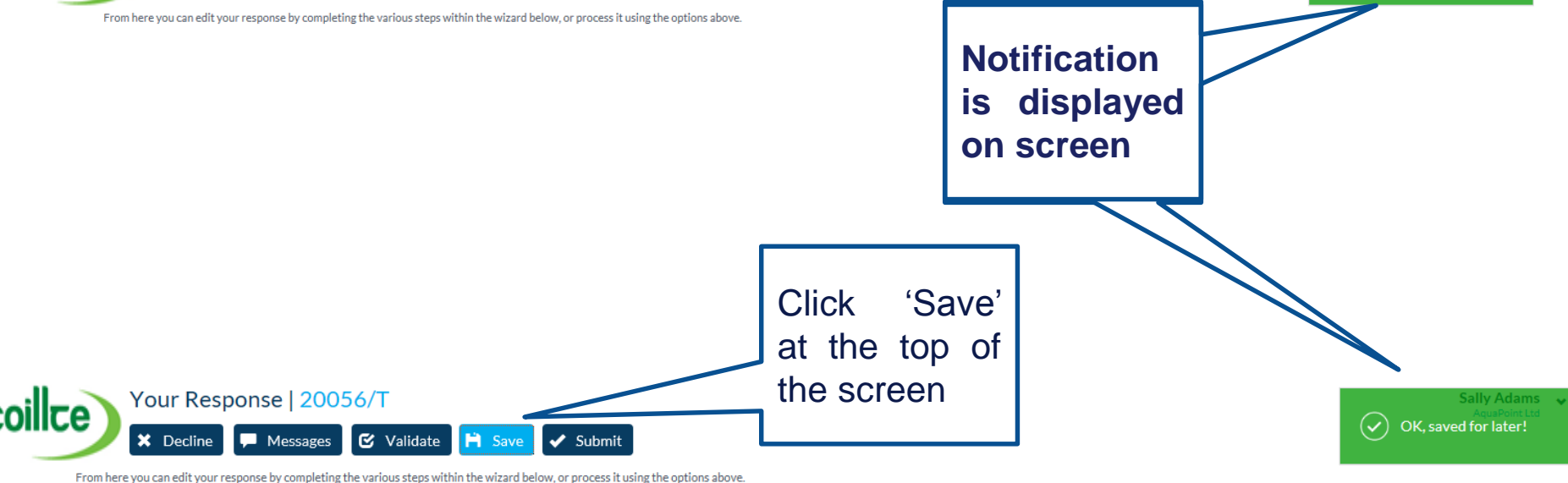
**Click 'Validate' at the top of the screen**

coillce Your Response | 20056/T

Decline Messages Validate Save Submit

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

Sally Adams  
AquaPoint Ltd  
OK, response is valid!



**Notification is displayed on screen**

coillce Your Response | 20056/T

Decline Messages Validate Save Submit

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

Sally Adams  
AquaPoint Ltd  
OK, saved for later!

**Click 'Save' at the top of the screen**

# Responding to a Tender Opportunity

## Step Eleven: Submit the response

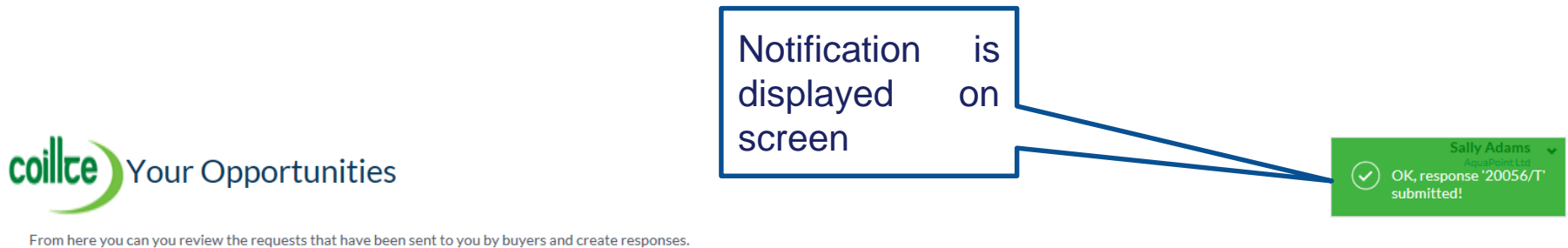


coilte Your Response | 20056/T

Decline Messages Valdate Save Submit

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

Click 'Submit' at the top of the screen



coilte Your Opportunities



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

Notification is displayed on screen

Sally Adams  
AquaPoint Ltd  
OK, response '20056/T' submitted!

Search by customer reference, title or customer name...

Search Filters

Reference	Customer Name	Title	Type	Closing Date	Time Remaining	Show Me
10081/R	Acme PLC	Phil Entity Test	Private	17/12/2014 12:00	5 days 19 hours	
20054/T	Acme PLC	FAQ	Private	18/12/2014 12:00	6 days 19 hours	

- 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)