

ProContract V3 Supplier Guide

Registering & Getting Started

Contents

ProContract V3 Supplier Guide	1
Registering & Getting Started.....	1
Registering.....	3
How to Register	3
Requirements.....	3
Contact Information.....	4
Company Information	5
Description.....	6
Opportunities - Category/Region Selection	8
T&C's and Privacy Policy.....	11
Confirmation Page	12
Submitting your Registration.....	12
Logging into ProContract Version 3	15
Portal Homepage.....	16
Contract Opportunities.....	17
Contract Opportunities	17
Searching Opportunities	17
Registering Interest in an Opportunity.....	20
Responding to Tenders	21
Viewing the Details/Documents	21
Messages	25
Completing the Response (using attachments)	27
Responding to Online Questionnaires.....	27
Responding to Lot Questionnaires	33
The Response Wizard	34
Item Breakdown.....	35
Uploading Attachments.....	36
Terms and Conditions	37

Submitting The Tender Response	38
Editing Tender Response and Re-Submission	39
Managing Account Details	40
Changing your Password	40
Updating your Personal Details	41
Updating your User Image	43
Updating Workgroups	44
Updating Access Rights	44
Viewing Audit History	45

Registering

To take part in **any** exercise and to be able to express an interest in a contract opportunity, first you **must register** on ProContract with details of yourself and also the company that you work for. This process is covered, in detail, in the following sections, with explanations of all the key actions required.

How to Register

On the portal home page there is a link to **Register** (for free) on the right hand side of the screen (as shown below).

Click the link to begin the step-by-step registration wizard, where you will be required to enter your company details.

Home page

The screenshot shows the ProContract portal home page. It features three main sections: 'News and announcements', 'Current opportunities', and 'New to portal'. The 'News and announcements' section includes two articles: 'Tories plan 'extreme cuts' - Labour' and 'Cameron pledges 500 new free schools'. The 'Current opportunities' section displays a table of the latest opportunities, with one entry for 'Cheshire' regarding 'Accommodation for Service User(s)'. The 'New to portal' section lists benefits of registration and provides 'Register' and 'Login' buttons. A 'Useful links' section contains a link to 'Contracts register'.

News and announcements [View all](#)

Tories plan 'extreme cuts' - Labour
Labour accuses the Conservatives of planning "extreme" public spending cuts of £70bn after the election, while the Tories say Labour would cause "chaos". [More](#)

Cameron pledges 500 new free schools
The number of free schools in England will more than double to over 900 by 2020, if the Conservatives are re-elected, David Cameron is to say. [More](#)

Current opportunities

Shown below is a list of the latest current opportunities

Opportunities

Buyer	Title	StartDate	EndDate	Estimated Value
Cheshire	(a) Accommodation for Service User(s)	05/02/2015 08:00:00	04/02/2019 08:39:00	£5,000,000.00

[Search all opportunities](#)

New to portal

List of benefits

- Gain real time feedback on the competitiveness of your bid
- Reduce the time required to win business
- Bid in your own local currencies
- Automatically calculate landing costs

Free registration

[Register](#) [Login](#)

[Forgotten your username or password?](#)

Useful links

[Contracts register](#)

Requirements

This page is an introduction to the process that you will be taken through in order to complete your registration on the portal. Please read the text carefully before proceeding through this process.

Minimum and recommended system requirements can also be viewed here. If you wish to proceed, click **Continue** from the options at the bottom of the page, or if you want to abort the registration process click **Cancel**.

Register

The screenshot shows the 'Requirements' step of the registration wizard. It features a progress bar at the top with seven steps: 1 Requirements, 2 Contact info, 3 Company info, 4 Description, 5 Opportunities, 6 T&Cs, and 7 Confirmation. The 'Requirements' step is currently selected. Below the progress bar, there is a welcome message and instructions. At the bottom, there are 'Continue' and 'Cancel' buttons.

1 Requirements 2 Contact info 3 Company info 4 Description 5 Opportunities 6 T&Cs 7 Confirmation

Welcome to the supplier registration wizard. The wizard will assist you with the completion of your registration.

Once you have confirmed your details and submitted your registration you will receive an email receipt.

Your submission will then be validated by the supplier approver and once approved you will be issued with a username and password to access the site.

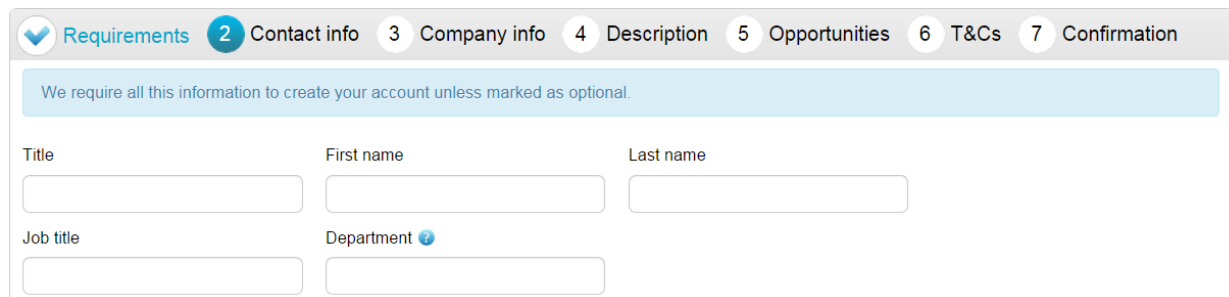
[Minimum and recommended system requirements](#)

[Continue](#) [Cancel](#)

Contact Information

At this stage of the registration process you need to enter your own contact details, a username, a password, and a memorable word/hint. These details will be used when logging into the system. You will be the primary account holder for this company (although details can be changed post registration) so this account holder will be able to modify the details for the company and add more accounts (which is detailed in another guide).


Register



The screenshot shows a registration progress bar with seven steps: Requirements (checked), Contact info (active), Company info, Description, Opportunities, T&Cs, and Confirmation. Below the progress bar is a light blue banner with the text: "We require all this information to create your account unless marked as optional." The form contains five input fields: Title, First name, Last name, Job title, and Department. The Department field has a blue question mark icon next to it.

Contact Information

In this section your contact information is entered along with your job details. Complete all mandatory fields.

Note: Further help regarding the fields can be found in the by hovering over the  icon.

Department - This will form your work group. All future members of this work group will be able to access events you are involved in.

E-mail - This is the e-mail address that messages will be sent to confirming registration details, and all other system communication that may take place during the tender process (including notifications of new tender opportunities). It is recommended in most instances that a **GENERIC EMAIL ADDRESS** is used, so that communication will not be lost if that person is away or leaves their position (i.e. to a sales@... or tenders@... address possible.) Also this must be of standard email format e.g. name@company.com.

Security Information

The second part of this stage is dedicated to setting up your security information. This is where you are asked to specify a password, a memorable word and a hint to help you in case you forget it. This must be something that is secure and also that is **memorable** to you.

When the details have been completed then please click on the **Continue** button to proceed, the **Back** button to go back to the previous stage, or the **Cancel** button to cancel the registration.

Company Information

In this section you will need to populate details regarding the company you work for/are registering on behalf of, as shown below.

Requirements Contact info **3** Company info 4 Description 5 Opportunities 6 T&Cs 7 Confirmation

We require all this information to create your account unless marked as optional.

Company name

Address

Town

County

Postal code / zip

Country

Website (optional)

Continue Back Cancel

You are required to enter the name of the company you work for and location details.

If any of the fields do not apply but are mandatory, such as “Postcode/ZIP” for companies based outside of the United Kingdom, by entering “**N/A**” here you can still proceed.

Note: Some of the fields (County and Country) are chosen by using a dropdown menu. To select a County/State click the arrow to the right of the box to reveal a drop down menu containing all the possibilities that can be chosen

From the list select the required option by clicking on its name and this will populate the field as required.

County

Northumberland

If United Kingdom is selected, then fields will appear requiring Registration number and VAT number.

When the details are complete then please click on the **Continue** button to proceed, the **Back** button to go back to the previous stage, or the **Cancel** button to cancel the registration.

Description

The first part of this stage requires a Company description and up to 6 keywords. Here more information on the company is entered to help the contracting organisation understand what it is your company does. The description helps promote your company to potential buyers, while the keywords can improve the 'searchability' of your company.

Note: A description and at least one keyword are required in this section. This is free text and as much information as required can be entered here.

It is important that you complete this information as the procuring organisations can search for a company based on the description or keywords specified.

Requirements Contact info Company info **4** Description 5 Opportunities 6 T&Cs 7 Confirmation

We require all this information to create your account unless marked as optional.

Company description
Promote your company to potential buyers.

E-Sourcing / Procurement software providers

Company keywords
Improve your company's searchability by entering a number of keywords.

1. Saas
2.
3.
4.

Number of Employees/Classifications

Enter your best estimate as to the number of employees in your organisation within the *Number of employees* field.

Number of employees

Please provide your best estimate as to the number of employees in your organisation

The final section is the *Classifications* section. This is where the supplier can highlight the classifications that the company belongs to (which is used for reporting purposes only). To select a classification hover over the relevant box and left click on the mouse to mark the box to the left with a tick. You can highlight as many that apply to your organisation.

Note: The first batch of classifications are mandatory and at least one must be selected from the list.

Classifications

Please check all that apply. This information is used for reporting purposes only.

Legal Status of Organisation

- Charitable Incorporated Organisation (CIO)
- Community Interest Company (CIC)
- General Partnership
- Industrial & Provident Society
- Limited Liability Partnership (LLP)
- Limited Partnership
- Private Company Limited by Guarantee (LTD)
- Private Limited Company (LTD)
- Public Limited Company (PLC)
- Sole Trader
- Unlimited Company
- Other

Note: The second batch of classifications are optional, and are selected in the same way as described above.

Further Organisation Detail (optional)

- Public sector organisation
- Charity
- Black and Minority Ethnic (BME) organisation
- A company owned and managed by women
- Social Enterprise (SE)
- Franchise
- Voluntary Community Sector (VCS)

When the details are complete then click on the **Continue** button to proceed, the **Back** button to go back to the previous stage, or the **Cancel** button to cancel the registration.

Opportunities - Category/Region Selection

This is the category and region selection stage of the supplier registration, which will look as shown below.

To select your chosen categories click the **Select Categories** button.

Categories

Have opportunities in the following categories emailed to you.

Select categories

Categories List

This section is where you can register your company to receive automatic e-mail notifications of new opportunities that have been published that may be of interest to your company. This will greatly assist you when using the portal and means that relevant opportunities are not missed. At least one category must be selected.

Category selection

Search categories

Enter the search criteria... **Search** Exact match Fuzzy search

Categories list

- 01000000 - Food
- 02000000 - Supply Chain
- 03000000 - Supplies and Services
- 04000000 - Drink

Category: The top level categories that you can register to receive updates under are all listed.

To select a top level category, mark the box to the left of the category by clicking it. You can select multiple categories if required. Ensure that you click on **Select Categories** to add this to the list.

If you are not sure, or if you want to put your company against lower level classifications, you may use the search facility at the top of the page to search for specific words to help you narrow down the categories to add to your account.

This can also be done by clicking on the blue diamond to the left of the category which will take you down to the next level. This can then be repeated to go down further levels in some categories.

Note: When selecting categories, only categories relevant to the goods or services you can offer as a supplier should be selected. Category selection can be revisited at anytime to

carry out required amendments, and searches of advertised opportunities for all categories can also be carried out at anytime.

Search categories

Enter the search criteria... Search Exact match Fuzzy search

Categories list

- 01000000 - Food
- 02000000 - Supply Chain
 - 02010000 - Waste
 - 02020000 - Energy
 - 02020100 - Utilities
 - 02020200 - Equipment

When all required categories have been chosen, click **Select Categories** from the options at the bottom of the page.

Requirements Contact info Company info 4 Description 5 Opportunities 6 T&Cs 7 Confirmation

Please correct the 2 errors on the form to continue

We require all this information to create your account unless marked as optional.

Categories


Have opportunities in the following categories emailed to you.

02020200 - Equipment

Please select at least one category.

Select categories

Selected categories are now shown as above.

Note: If a category has been added in error this can be removed by clicking the  button.

Regions

At least one *Region* must now be selected. These will limit the opportunities that you are emailed to only regions that you supply to. Regions are selected in the same way as categories.

The screenshot shows a web interface for region selection. On the left, there is a sidebar with the title 'Register' and several sections: 'Requirements' (with a 'We require all the' text), 'Categories' (with 'Have opportunities' text and '02020200 - Equip' category), and 'Regions' (with 'Limit opportunities' text). The 'Regions' section has a 'Select regions' button and 'Continue' and 'Back' buttons. The main content area is titled 'Region selection' and contains a search bar with the text 'Search regions' and a 'Search' button. Below the search bar is a 'Regions list' section with a tree view of regions. The regions listed are: UK - UNITED KINGDOM, UKC - NORTH EAST (ENGLAND), UKC1 - Tees Valley and Durham, UKC2 - Northumberland and Tyne and Wear (checked), UKD - NORTH WEST (ENGLAND), UKE - YORKSHIRE AND THE HUMBER, UKF - EAST MIDLANDS (ENGLAND), and UKG - WEST MIDLANDS (ENGLAND). Below the list is a 'Selected regions' section with a text box containing 'UKC2 - Northumberland and Tyne and Wear' and a 'Remove' button. At the bottom, there are buttons for 'Select regions', 'Remove all', and 'Cancel'.

Additional Classifications/Categories

Also further lists/categories may now also be found (if the procuring organisation/portal have used these) This allows you to register against further supplier lists, as set up by the procuring organisation(s) to allow you to be further categorised and found more easily by procurers.

Note: This is totally independent of the Contract Category Interest that is chosen and this will NOT generate any email notifications.

Each list will show up with the title, followed by a classification structure, which you can register your company against. Tick the options that are applicable from this list, this may be done for several lists.

When the details are complete then please click on the **Continue** button to proceed, the **Back** button to go back to the previous stage, or the **Cancel** button to cancel the registration.

T&C's and Privacy Policy

This is the step where you will be asked to agree to the Terms and Conditions of using the system, and also the privacy policy as laid out by Due North.

Register

Requirements Contact info Company info Description Opportunities **6 T&Cs** 7 Confirmation

Due north terms and conditions

Due North Limited

Terms and Conditions of use

Acceptance of Terms

The Website may provide communication tools such as email, bulletin boards, chat areas, news groups, classifieds, forums and/or other message or communication facilities ("the Services") designed to enable you to communicate with others. Unless stated otherwise the Services are for your personal and organisation's use only. Your access to and use of www.nepoportal.org ("the Website") and the Services outlined, are subject exclusively to these Terms and Conditions.

You will not use the Website/Services for any purpose that is unlawful or prohibited by these Terms and Conditions. By using the Website/Services you are fully accepting the terms, conditions and disclaimers contained in this notice. If you do not accept these Terms and Conditions you must immediately stop using the Website/Services.

Due North Limited reserves the right to update or amend these Terms and Conditions at any time and your continued use of the Website/Services following any changes shall be deemed to be your acceptance of such change. It is therefore your responsibility to check the Terms and Conditions regularly for any changes.

International Use

You agree to comply with all applicable laws regarding the transmission of technical data exported from the United Kingdom or the country in which you reside

Privacy policy

Due North Limited

This document should be read in conjunction with the Terms and Conditions shown on this site.

Privacy

Due North Limited shall comply with all applicable UK data protection legislation in place in respect of any personal information relating to you or information pertaining to your company.

Due North Limited will not supply customer or personal information held on this site to other parties who could use it for commercial purposes.

You must agree to all conditions to continue

[Continue](#) [Back](#) [Cancel](#)

To agree with Due North Ltd's Terms and Conditions and Privacy Policy tick the box placed at the bottom of the page.

When the box is ticked click on the **Continue** button to proceed, the **Back** button to go back to the previous stage, or the **Cancel** button to cancel the registration.

Confirmation Page

The final screen will be a summary of the details that have already been entered into the system, that need to be checked before completion of registration.
If you are unhappy or would like to change any of the information in the sections then this can be done by clicking on the **relevant stage title** along the top of the page.

Register

Requirements	Contact info	Company info	Description	Opportunities	T&Cs	7 Confirmation
Name	Mr Chris Cox					
Job title	Support					
Department	Support					
Telephone	01670597120					
Fax						
Mobile						
User name	chris.cox					
Email	chris.cox@due-north.com					
Company name	Cox & Clifton					
Address	1 DN Support, Support Town, Northumberland, NE23 1LZ United Kingdom					
URL						
Registration number	123456					
VAT number	VAT1234					
Company description	Support					
Keywords	Support					
Number of employees	10					
Legal Status of Organisation	Private Limited Company (LTD)					
Further Organisation Detail						
Categories	02020200 - Equipment					
Regions	UKC2 - Northumberland and Tyne and Wear					
Public lists						

Submitting your Registration

Once you are happy that all details are complete and correct the Registration needs to be submitted.

Regions	UKC2 - Northumberland and Tyne and Wear
Public lists	
Submit registration	Back Cancel

When you are happy that all the information is complete and correct, click **Submit Registration** at the bottom of the screen. Click the **Back** button to go back to the previous stage, or the **Cancel** button to cancel the registration.

This will show the Supplier Registration Confirmation page as shown below.

Thank You

Thank you for registering your details. Your registration will be assessed and you will be notified of the outcome in due course.

[Continue](#)

The system will then send a confirmation e-mail to say the application is being considered. The email will also contain an application reference number for your own records.

Click **Continue** to return to the supplier portal.

When the registration is accepted then you will receive an email containing a reminder of your username and the link to access the opportunity portal.

Getting Started

System Requirements

PC - Minimum computer specifications

	Minimum	Recommended
Processor	Intel/AMD 200Mhz	Intel/AMD 1Ghz
Operating system	Windows 98 and above / Linux	Windows XP and above / Linux
Memory	32 MB	1 GB
Internet browser	Internet Explorer (Version 9) Google Chrome (Latest)	Internet Explorer (Version 9) Google Chrome (Latest)
Screen display	800x600 256 colours	1024x768 32-bit colour
Internet connection*	56K Dialup	512k Broadband

Apple Mac - Minimum computer specification

	Minimum	Recommended
Processor	Power PC 300Mhz	Intel/Power PC 1Ghz
Operating system	Mac OS 9.0+	Mac OSX
Memory	32 MB	1 GB
Internet browser	Internet Explorer (Version 9) Google Chrome (Latest)	Internet Explorer (Version 9) Google Chrome (Latest)
Screen display	800x600 256 colours	1024x768 32-bit colour
Internet connection*	56K Dialup	512k Broadband

* Performance of uploads/downloads is directly related to the bandwidth/usage of your internet connection. It may also be affected by the configuration of your computer/internet browser. The bandwidth available at our data centre supports the highest connection speeds available, so you should always get the best performance that your configuration provides.

Logging into ProContract Version 3

When visiting the opportunities portal the screen will look similar to that shown below. Here, click on the **login** icon on the right hand side of the screen to log into the system.



Home page

› News and announcements [View all](#)

Current opportunities

Shown below is a list of the latest current opportunities

Buyer	Title	StartDate	EndDate	Estimated Value
Cheshire	(a) Accommodation for Service User(s)	05/02/2015 08:00:00	04/02/2019 08:39:00	£5,000,000.00

[Search all opportunities](#)

New to portal

List of benefits

- Gain real time feedback on the competitiveness of your bid
- Reduce the time required to win business
- Bid in your own local currencies
- Automatically calculate landing costs

Free registration

[Register](#) [Login](#)

[Forgotten your username or password?](#)

Useful links

[Contracts register](#)

This will then change to the portal login screen where user name and password need to be entered.

Log In

User Name

Password

[Forgotten your username or password?](#)

[Continue](#)

User Name: In this field you enter your username that you set within your application for the portal. Click into the text box and type your name, which may contain both text and numbers.

Password: In this field you enter your password that you set within your application for the portal. Again, click into the box and type your password. This is **Case Sensitive**. Once this has been done click on the **Continue** button.

If you have forgotten any of the above information, there are links to click to reset the security details.

Portal Homepage

You are now taken to the supplier home page.

The screenshot shows the Portal Homepage with a blue navigation bar at the top containing 'Home', 'Find opportunities', 'My activities', 'Chris Cox', 'Your account', and 'Logout'. Below the navigation bar is a search bar with 'All opportunities' as a dropdown, a search input field, and a 'Go' button. The main content area is titled 'Home page' and is divided into several sections:

- News and announcements:** Contains two news items. The first is 'Tories plan 'extreme cuts' - Labour' with a sub-headline 'Labour accuses the Conservatives of planning "extreme" public spending cuts of £70bn after the election, while the Tories say Labour would cause "chaos".' and a 'More' link. The second is 'Cameron pledges 500 new free schools' with a sub-headline 'The number of free schools in England will more than double to over 900 by 2020, if the Conservatives are re-elected, David Cameron is to say.' and a 'More' link.
- Activities:** Features tabs for 'Active activities', 'Archived activities', and 'Last viewed activities'. Below the tabs is a search bar with 'All buyers' as a dropdown, a search input field, and a 'Go' button. A red message below the search bar reads 'Your criteria returned no results'.
- Opportunities:** Contains a sub-section titled 'Suggested Opportunities' with a red message below it that reads 'No matching records found'.
- Company details summary:** Shows 'Cox & Clifton' with address '1 DN Support, Support Town, Northumberland, NE23 1LZ', a 'Description' of 'Support', and 'Keywords' of 'Support'. There is an 'Edit' link next to the company name.
- Workgroups:** Contains a description: 'Activities are assigned to workgroups allowing all contacts within a workgroup to work on the activities together'. There is a 'Support (1)' link and an 'Add new workgroup' button.

Logout can be clicked at any time to log out of the portal when you are finished. You can also access and make changes to **Your Account** here too.

The **Activities** area will show any Active, Archived or Last Viewed Activities you are currently included in.

The **Opportunities** area will show any suggested opportunities based on the categories and regions selected in your profile.

Company details and **Workgroups** can also be viewed/amended.

Opportunities

Contract Opportunities

Contract opportunities are posted by buying organisations to notify you of their up and coming contracts and to give suppliers a chance to express their interest in the opportunity and to receive the relevant documents.

Contract Opportunities

Contract Opportunities are posted by buying organisations to notify you of their up and coming contracts and to give suppliers a chance to express their interest in the opportunity and to receive the relevant documents.

The opportunities area will also show a list of **suggested opportunities**, based on the Categories and Regions selected in your profile.

The screenshot displays the user interface for the Opportunities section. At the top left, there is a news snippet with a blue icon and text: "The number of free schools in England will more than double to over 600 by 2020, if the Conservatives are re-elected, David Cameron has promised." with a "More" link. Below this is the "Activities" section, which has a "View full screen" link. It contains three tabs: "Active activities", "Archived activities", and "Last viewed activities". Under "Active activities", there is a dropdown menu set to "All buyers", a "Go" button, a search input field, and another "Go" button. A red message below the search area states "Your criteria returned no results". Below the "Activities" section is the "Opportunities" section, which includes a "Suggested Opportunities" tab and a red message: "No matching records found". On the right side of the page, there are three sections: "Support" with a "Support" link, "Keywords" with a "Support" link, and "Workgroups" with a description: "Activities are assigned to workgroups allowing all contacts within a workgroup to work on the activities together", a "Support (1)" link, and an "Add new workgroup" button.

Searching Opportunities

To search for new opportunities from the supplier home page click on **Find Opportunities** located across the top of the page.

The screenshot shows the top navigation bar of the web application. It has a blue background with white text. On the left, there are three links: "Home", "Find opportunities", and "My activities". On the right, there is the user name "Chris Cox", followed by "Your account" and "Logout". Below the navigation bar is a search bar with a dropdown menu set to "All opportunities", a search input field, and a "Go" button.

Home page

This will then open the Opportunities screen which includes a full list of all current opportunities. You can specify search criteria to **narrow your results** in the left hand panel, or just do a key word search (on Title, Buyer or All Data) within the **Search** area in the top right of the page.

Home > Find Opportunities All data Search **Go**

Opportunities

Narrow your results

- Portals
 - All
 - North West Portal
- Categories

There are 0 categories selected

[Add new category](#)
- Regions

There are 0 regions selected

[Add new region](#)
- Include Closed

Yes No
- Interest Date

Start date
End date

Update

Opportunities

Title	Buyer	Expression Start	Expression End	Estimated Value
(a) Accommodation for Service User(s)	Cheshire	05/02/2015	04/02/2019	£5,000,000.00

Narrow your results on:

Portals: This setting allows the Portal you are searching on to be chosen.

Categories: This field allows you to choose the category classification to which the opportunities you wish to search for are associated. To select a category, click on the *Add new category* and search for the relevant entry.

Regions: This field allows you to choose the region to which the opportunities you wish to search for are associated. To select a region, click on the *Add new region* and search for the relevant entry.

Include Closed: This defaults to No which will show only opportunities that you can currently express your interest in - so the expression of interest window is open. To view all current opportunities, and also all past and future opportunities that are on the portal but have closed, mark Yes.

Interest Date: Refine your results based on the Expression of Interest date.

Once the search has been set up in the desired way then click on Update and the opportunity results in the middle of the page will refresh.

To view the further details of the opportunity, click the corresponding **title**.

Opportunities				
Title	Buyer	Expression Start	Expression End	Estimated Value
(a) Accommodation for Service User(s)	Cheshire	05/02/2015	04/02/2019	£5,000,000.00

The opportunity details will look as shown, with all the relevant opportunity/contract details.

[Home](#) > [Find opportunities](#) > (a) Accommodation for Service User(s)

[Return to find opportunities](#)

[Register interest in this opportunity](#)

Main contract details

Title (a) Accommodation for Service User(s)

Categories 03000000 - Supplies and Services

Description This is for the provision of Accommodation for Service User(s) coming via our Care Brokerage team. We are running this exercise as an Open DPS Framework. This means that as a potential provider you can apply to be added to this framework as anytime throughout it's 4 year duration. If you don't succeed with your first attempt you can try again at a latter stage. Please also find attached a contract overview and a summary of how the DPS works and the advantages for you as the provider.

Contact details

Buyer Cheshire

Contact Buyer One

Email buyer1@example.com

Telephone 56446565

Fax 654546546

Address Enterprise Court
Cramlington
Northumberland
NE23 1LZ
United Kingdom

Key dates

Estimated contract dates	
Start date 30/01/2015	End date 30/01/2016
Expression of interest dates	
Start date 05/02/2015 08:00:00	End date 04/02/2019 08:39:00
Current Dynamic Purchasing System (DPS) round information	
End date 30/01/2016 00:00:00	

Attachments

Public attachments can be viewed by all procurers and suppliers involved in this project

No attachments

Main Contract Details

This shows key details of the contract including the title, categories and description.

Key Dates

This section shows the estimated contract dates, the expression of interest dates and any other important information (i.e. Current DPS Round end date, for example.) The expression of interest dates determine the options that will be available regarding the opportunity, as the date must fall within these two dates in order to express an interest.

Contact Details

This shows details of the Buyer and Main Contact.

Attachments

Any attachments or links relevant will appear in the bottom right, where they can be viewed/downloaded by clicking on the title.

In the top right there are 2 options – either register an interest in the opportunity, or return to the find opportunities page.

Registering Interest in an Opportunity

To register interest in a particular opportunity you must be registered on the portal. See the section [Registering](#)

Once registered, you will have a username and password to access the portal. This allows you to register interest in any opportunities that are advertised on the portal.

Once you are logged in, you can find the relevant opportunity using the process in the section [Contract Opportunities](#).

If after viewing the information regarding the opportunity you decide that you are no longer interested in registering an interest then click the *Return to find opportunities* button. If you do decide you would like to express your interest then click on **Register interest in this opportunity**.

The screenshot shows a user interface with a grey header bar on the left containing the text "Service User(s) running this exercise". To the right, there is a blue link "Return to find opportunities" and a green button "Register interest in this opportunity". Below the button is a grey box titled "Contact details" containing the following information:

Buyer	Cheshire
Contact	Buyer One

The same area will now show **confirmation** of the registered Expression of Interest. Click [Return to find opportunities](#) to start a New Search.

The screenshot shows the same user interface as above, but with the green button replaced by a grey box titled "Expression of interest registered". The text "Return to find opportunities" is still visible above the box. The box contains the following information:

Date	09/03/2015 16:25:33
Workgroup	Support

Responding to Tenders

When an RFQ/PQQ//Tender is published an e-mail will be sent by the system to inform you of this, and that the exercise can now be viewed and worked on. The following section of the user guide will take you through the RFQ/PQQ/Tender response process.

Note: While this guide covers the attachment of an ITT response, it remains the same for the return of a PQQ or RFQ, it is just the specific wording that will change.

Viewing the Details/Documents

Login to the system and then it will take you to your homepage.

The screenshot shows the system homepage with a navigation bar at the top containing 'Home', 'All opportunities', a search box, and a 'Go' button. Below the navigation bar, the 'Home page' section is divided into several panels:


- News and announcements:** Contains two news items. The first is 'UK surveillance 'lacks transparency'' with a sub-headline 'The legal framework surrounding surveillance by MI5, MI6 and GCHQ is "unnecessarily complicated" and "lacks transparency", MPs say.' The second is 'Farage: I'd axe 'much of' race laws' with a sub-headline 'Nigel Farage says UKIP would scrap many laws designed to prevent racial discrimination - but says his comments have been "wilfully misrepresented".'
- Company details summary:** Shows details for 'Cox & Clifton', including '1 DN Support, Support Town, Northumberland, NE23 1LZ', 'Description: Support', and 'Keywords: Support'.
- Workgroups:** States 'Activities are assigned to workgroups allowing all contacts within a workgroup to work on the activities together' and includes a 'Support (1)' link and an 'Add new workgroup' button.
- Activities:** Features a tabbed interface for 'Active activities', 'Archived activities', and 'Last viewed activities'. It includes a search bar and a table of active activities.

Buyer	Title	Current event	Event deadline
★ Cheshire	Example Project	Example ITT	22/04/2015
★ Cheshire	(a) Accommodation for Service User(s)	(a) Accommodation for Service Users	28/01/2016

From here to view your current activities that you are working on, from the **Activities** section click on the title of the Activity you wish to work on.

The **Activities** area shows all the various tenders that you have registered with, this can be an ITT (Invitation to Tender), RFQ (Request for Quotation), a PQQ (Pre-Qualification Questionnaire) etc.

Note: The process is the same in the system for all types of tender opportunity, PQQ, ITT and RFQ's, etc. however, in this case the ITT has been chosen to look through, and ITT will be referred to at various points. If you are completing a PQQ or Quotation (using attachments) then the screens will remain the same, it is only the terminology that will change. Online responses to online evaluations are covered in a separate guide/help section.

As you can see above, the Buyer, Title of the project, current event and event deadline is shown. In this case it shows a  symbol to reflect it is new and it has not yet been viewed or worked upon yet.

By clicking on the title in blue, further information is now shown. From this screen all aspects of this project can be dealt with; the tender can be viewed, questions can be asked and answers received, additional information can be issued and your response can be put together and sent to the contracting organisation. Each stage of the procurement process will be seen as its own section.

To view the relevant stage of the project click **Open Event** within the relevant stage, in this instance 'Example ITT'.

[Home](#) > Example Project

Activity : Example Project

[< Back to home page](#)

Events

[Example ITT](#) In Progress [Hide details](#) | [Open event](#)

Reference: 41 **Start date:** 24/03/2015
End date: 22/04/2015 **Event status:** In Progress

[Archive this activity](#)

Messaging

You have 0 unread message(s).
[View messages](#)

Audit history

[View audit history](#)

This will open the tender screen. This is broken up into different sections; Main details, Public attachments, Terms & Conditions, Item breakdown and Messaging. **Note:** There is also a **countdown timer** in the top right indicating the time left until the submission deadline.

Cheshire - ITT
41

▼ Main details

Title: Example ITT **Respond by:** 03/14/2015 21:30:00

Description:
Example ITT

▼ Public attachments

Public attachments can be viewed by all procurers and suppliers involved in this rfx

[ITT Attachment.docx](#) 12 KB

[Specification & Requirements Document.docx](#) 12 KB

▼ Terms & conditions

[Standard Legal Terms](#)

▼ Item breakdown [Export](#)

Item description	Unit of measure	Quantity	Comments
Uniform			
Branded Jumpers (Mens)	per jumper	500	
Branded Cardigan (Womens)	per cardigan	500	

Time remaining

2
Days

6
Hours

5
Minutes

28
Seconds

Messaging

You have 0 unread message(s).
[View messages](#)

▼ Response controls

[Start my response](#)

[Register intent to respond](#)

[No longer wish to respond](#)

▼ My responses

You have not yet started your response.

The different sections are explained below;

Main details

This section shows the title, description and date and time the completed tender must be returned by.

Public attachments

This section shows the attachments that have been published by the organisation. To download click on the title of the attachment.



Note: There may be no attachments here, however, in the majority of cases there will be. Where there are documents, they should be **downloaded and saved** to your own network or desktop before working on them.

Item Breakdown

This section is the item breakdown for the tender used for pricing, if one has been created by the organisation.

Note: This is an optional section and there may not be one included with an exercise.

This shows the description of the group/line item, the unit the item is measured in, the quantity of these units required and any additional comments regarding the line item (shown by hovering over the icon.) An example of one is shown below.

Item breakdown Export			
Item description	Unit of measure	Quantity	Comments
Uniform			
Branded Jumpers (Mens)	per jumper	500	
Branded Cardigan (Womens)	per cardigan	500	

This can also be exported if required, by clicking **Export**.

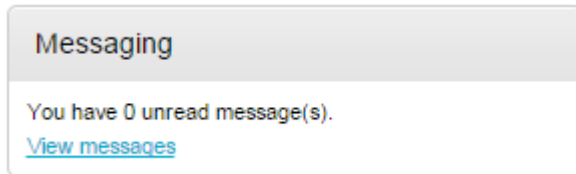
Terms and Conditions

The Terms and Conditions section shows the terms that have been used with this tender. To view them click on the Terms & Conditions title, shown in blue. There will be at least one set of terms here and there can be more depending what the procuring organisation have set up.

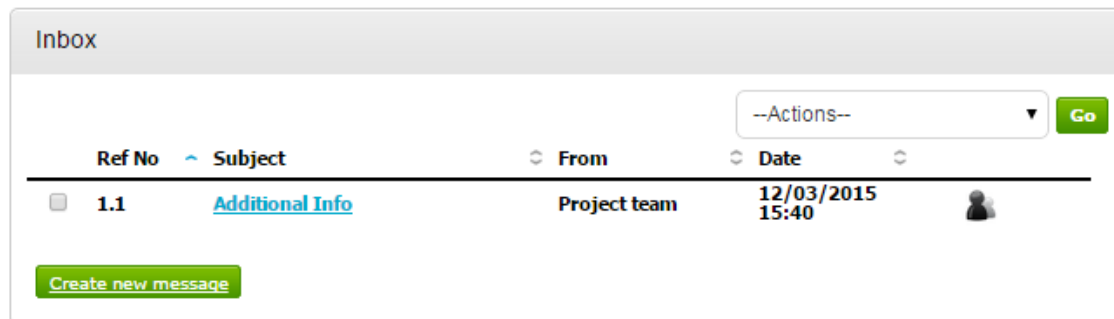
Terms & conditions	
	Standard Legal Terms

Messages

During the process all questions should be raised using the portal. The ability to ask questions/send messages is found in the Messaging section. Anything sent through this area will go to the member of staff that is working on this within the procuring organisation. Open this area by clicking on **View Messages**.



This will show any messages that have already been sent or received. To send a new message, click on the **Create new message** button.



Populate the subject along with the main body of text, and once done then click on the **Send** button. Attachments can also be added (details of adding an attachment within the system is included later in this guide).

New message

To: Project team



Subject:

Attachments: **+**




Will the branding be required on the front only, or back too?




Click **Send message** to issue the message to the procuring organisation.

The sent message is now shown in the Inbox.

Inbox					
				--Actions--	Go
Ref No	Subject	From	Date		
<input type="checkbox"/> 1.1	Additional Info	Project team	12/03/2015 15:40		
<input type="checkbox"/> 2.1	Branding	Cox & Clifton - Support	12/03/2015 15:44		

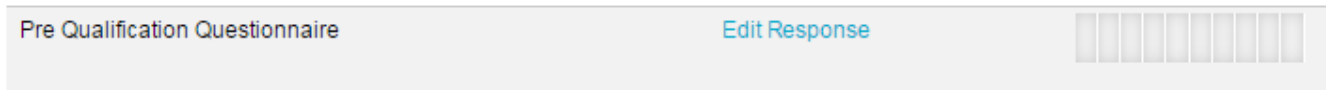
[Create new message](#)

When a reply to that message is sent by the procuring organisation, you will see that the reply is linked to the original message by the numbering. All messages you send to the procuring organisation will be privately sent to them, shown by the  symbol. When the procuring organisation replies they may reply privately to you alone (), or publicly (so all suppliers involved in this stage) can see the response (). **Note:** The system will NEVER show which supplier sent the original message.

Inbox					
				--Actions--	Go
Ref No	Subject	From	Date		
<input type="checkbox"/> 1.1	Additional Info	Project team	12/03/2015 15:40		
<input type="checkbox"/> 2.1	Branding	Cox & Clifton - Support	12/03/2015 15:44		
<input type="checkbox"/> 2.1.1	RE: Branding	Project team	12/03/2015 15:55		

[Create new message](#)

Note: This is optional, and the contracting organisation may not have included an online questionnaire, so if this stage may not be available.
 If an evaluation has been included, click on **Edit response** to begin answering the questions/view further information and help.



This will open the evaluation summary screen.

View Evaluation questions

Question	Weight %	Section Status	Status	Flag
1 Company Information Incomplete section Section weight: 0.00%				
1.1 Company Name	0.00%	Answer question		
1.2 Company Address	0.00%	Answer question		
2 Pass / Fail Questions Incomplete section Section weight: 0.00%				
2.1 Do you have an environmental policy?	0.00%	Answer question		
2.2 Have you ever been declared bankrupt?	0.00%	Answer question		
2.3 Please confirm if the Applicant (or any organisation within the Applicant's group, including any parent or subsidiary companies) has been accused of or found guilty of blacklisting. If so, please provide details, including the steps taken to address this.	0.00%	Answer question		
2.4 The Council is	0.00%	Answer question		

Progress

Progress indicator: 10 empty boxes

Key

- ✔ The answer provided is valid and complete.
- 🔄 The answer has been automatically populated from a previous answer but it must be reviewed before submission.
- ✔ The answer has been automatically populated from a previous answer and does not need to be reviewed.
- ★ The question has been flagged for review.

Public attachments

[Specification & Requirements Document.docx](#) 9 KB

Online Response

The screen above shows you the sections and relevant questions in each section and the total weighting value of each individual section and question.

Note: Some questions may have a ✔ symbol next to them automatically. This means the question has been answered by you before, and is still valid.

1.1 Company Name 0.00% [Answer question](#) ✔

Click on **Answer question** to obtain more information about that question.

1.2 Company Address 0.00% [Answer question](#)

This will now bring up further information, including the title, weighting, and help and public attachments linked to this question. It will also give you the ability to **answer the question**.

Company Information | Question 2 of 2

Question Company Address	Weight 0.00 %
Answer Flag question for review <input type="checkbox"/> Company Address is: 1 Supplier Street North Supplier UK <u>SU1</u> 1PL Save and close Previous Next	Question attachments No attachments Help This question is mandatory Enter registered address of company

There may be further section help available. To view this, click

[Show more information](#)

in the

[Show more information](#)

Company Information | Question 2 of 2

Question Company Address	Weight 0.00 %
Answer Flag question for review <input type="checkbox"/>	Question attachments No attachments

There is also the ability to **flag a question for review**, by marking the tick box.





Flag question for review

When you have answered a question, and are happy to move forward, you can either *Save and close*, which will take you back to the summary page, or click *Previous / Next* to move onto the questions before/after this one.

North Supplier UK <u>SU1</u> 1PL Save and close Previous Next	This q Enter r
--	-------------------


Alongside each question, you may have one of the following icons;

Key


-  The answer provided is valid and complete.
-  The answer has been automatically populated from a previous answer but it must be reviewed before submission.
-  The answer has been automatically populated from a previous answer and does not need to be reviewed.
-  The question has been flagged for review.

As you move through the questionnaire, the **Progress** bar on the summary page will reflect this and show how much has been completed.

View Evaluation questions

Question	Weight %	Section Status	Status	Flag
1 Company Information		Complete section	Section weight: 0.00%	
1.1 Company Name	0.00%	Answer question		

Progress



Each question may give different options on how you are required to answer the question. Examples are below; however the answer method is dictated by the organisation who has requested your answers.

Yes/No

This type of question requires you to answer either Yes or No.

Pass / Fail Questions | Question 1 of 5

Question

Do you have an environmental policy?

Answer

Yes No

Flag question for review

Save and close [Previous](#) [Next](#)

Number

This type of question requires you to answer using numerical values.

Financial Details | Question 1 of 2

Question	
What was your company turnover for the last financial year?	
Answer	
<input type="text"/>	Flag question for review <input type="checkbox"/>

Text

You are required to answer this type of question with text. You will be advised of a maximum number of characters.

Company Information | Question 1 of 2

Question	
Company Name	
Answer	
Flag question for review <input type="checkbox"/>	
<input type="text" value="Due North Ltd."/>	
<input type="button" value="Save and close"/>	Previous Next

Option

This type of question requires you to choose from a drop down list

General Information | Question 1 of 3

Question

How many staff do you currently employ?

Answer

Please select Flag question for review

- Please select
- 0 - 10
- 10 - 25
- 26 - 50
- 50 - 100
- 100+

Checkbox

To answer this type of question you must check the box alongside the relevant answer(s). It may be that you are able to give more than one answer.

General Information | Question 3 of 3

Question

Which of the following accreditations do you currently hold?

Answer

ISO27001 Investor in People Other N/A Flag question for review

Attachment

With this type of question you are required to add an attachment as an answer.

Technical Lot Questions | Question 1 of 1

Question

Attach your technical response

Answer

No attachments Flag question for review

Click 'Add attachment' and you will be prompted with the document upload facility.

Responding to Lot Questionnaires

When a buying organisation publishes questionnaire sets using Lots, they will appear in your Tender Summary page as shown below.

My response
27 Draft

▼ Evaluation criteria/question sets

Title	Action	Progress	
Pre Qualification Questionnaire	Edit response	<div style="width: 100%; height: 10px; background-color: green;"></div>	Mandatory
Lot 1 Questionnaire	Edit response	<div style="width: 50%; height: 10px; background-color: #ccc;"></div>	Opt out
Lot 2 Questionnaire	Edit response	<div style="width: 50%; height: 10px; background-color: #ccc;"></div>	Opt out

<Back to summary

Time remaining

Respond by: 25 March 2015 01:30

4
10
59
6

Days
Hours
Minutes
Seconds

▼ Response controls

[Open response wizard](#)

Submission checklist

Note: Where 'Mandatory' is stated alongside a 'Lot' this means that the question set must be answered.

Note: Where 'Opt out' appear this means that the questions are optional to be completed.

▼ Evaluation criteria/question sets

Title	Action	Progress	
Pre Qualification Questionnaire	Edit response	<div style="width: 100%; height: 10px; background-color: green;"></div>	Mandatory
Lot 1 Questionnaire	Edit response	<div style="width: 50%; height: 10px; background-color: #ccc;"></div>	Opt out
Lot 2 Questionnaire	Edit response	<div style="width: 50%; height: 10px; background-color: #ccc;"></div>	Opt out




The response is completed by clicking Edit response and answering the questions. Once you have complete a series of questions the progress bar will be full.

Pre Qualification Questionnaire [Edit response](#) Mandatory

If you wish to opt out of a non-mandatory set of questions, then you are required to click on **Opt out**.

Lot 1 Questionnaire [Edit response](#)[Opt out](#)

The system will then display your question sets in the following manor, to show questions sets you are required to answer and question sets you have opted out of.

Evaluation criteria/question sets			
Title	Action	Progress	
Pre Qualification Questionnaire	Edit response		Mandatory
Lot 1 Questionnaire	Edit response		Opt out
Title	Action	Progress	
Lot 2 Questionnaire	View question set		Opt in

You can easily opt back in by clicking the *Opt in* option.

The Response Wizard

This will open up the response wizard that will take you through each stage of the tender response to make sure it is completed successfully. Stage 1 will always contain a welcome message which should be read carefully.

Create ITT response

1 Details
2 Item Breakdown
3 Attachments
4 Terms & conditions

Response reference: 25

Welcome to the ITT response wizard.

The wizard will assist you with the completion of your response.

You will be presented with a number of different steps to complete. Once each step has been completed you can click the 'Continue' button to proceed to the next step, or 'Back' to return to the prior step or 'Cancel' to exit the wizard.

After the completion of each step, the response information entered will be saved as a draft, which will allow you to resume the response at a later date if required.

Once all the steps have been completed and all mandatory response criteria have been met, you will be asked if you wish to submit your response.

If you agree to submit your response, you will receive a confirmation receipt email. Please note, if you do not receive the confirmation email please contact support as you cannot be guaranteed that your response has been received.

Continue
[Reset](#)
[Cancel](#)

From the options section at the bottom of the page click **Continue** to move onto the next page or click **Cancel** to leave the wizard.

Item Breakdown

The next screen in this example is the Item description breakdown, however, if no item breakdown has been specified by the procuring organisation then this stage will not appear.

This stage is where the prices are entered for specific items.

This will show;

Item description- Here the specific item that is being asked for is specified

Unit of measure- Specified by the procuring organisation, this is the items that the item is measured in.

Quantity- The number of items required.

Unit Price-The price per unit of the item, in the specified currency, is entered here.

Total- This is calculated by the system by multiplying the quantity by the item price.

To enter the prices into the system click **Edit** in the corresponding row and enter the amount per item, with any comments (optional) and click **Save** to return to the overview, or **Next** to move to the next item.

Item description	Unit of measure	Quantity	Price	Total
Uniform				
Branded Jumpers (Mens)	per jumper	500	£0 Edit	-
Branded Cardigan (Womens)	per cardigan	500	£0 Edit	-
Total:				-

Item description

Branded Jumpers (Mens)

Item details

Unit of measure: per jumper

Quantity: 500

Unit price

Supplier comments (optional)

Same price for all sizes

[Save](#) [Next](#) [Previous](#)

Comments

200 L, 200 M, 100 S

If you prefer, you can export the item template to Excel, complete there, and then upload the completed template using the **Import/Export** area as highlighted below.

Create ITT response

The screenshot shows the 'Create ITT response' wizard at the 'Item Breakdown' stage. The top navigation bar includes 'Details', '2 Item Breakdown', '3 Attachments', and '4 Terms & conditions'. The main area contains a table with the following data:

Item description	Unit of measure	Quantity	Price	Total
Uniform				
Branded Jumpers (Mens)	per jumper	500	£10.00 Edit	£5,000.00
Branded Cardigan (Womens)	per cardigan	500	£9.00 Edit	£4,500.00
Total:				£9,500.00

To the right of the table is an 'Import/Export' sidebar with two buttons: 'Export item template' and 'Upload completed template'. Below the second button is a text box explaining that users can export the item breakdown to an XLS spreadsheet for offline completion. At the bottom of the wizard are buttons for 'Continue', 'Reset', 'Cancel', and 'Back'.

When complete click **Continue** to move onto the next page, **Reset** to begin the wizard again and remove all info, **Cancel** to leave the wizard completely (without saving) or **Back** to return to the previous stage.

Uploading Attachments

The next stage allows you to upload your relevant tender attachments.

Note: In some cases an attachment will be mandatory, so it may not let you submit until an attachment is added at this stage.

Create ITT response

The screenshot shows the 'Create ITT response' wizard at the 'Attachments' stage. The top navigation bar includes 'Details', 'Item Breakdown', '3 Attachments', and '4 Terms & conditions'. The main area contains a text box with the message 'No attachments' and a green 'Add attachment' button. At the bottom of the wizard are buttons for 'Continue', 'Reset', 'Cancel', and 'Back'.

To add an attachment click  .

You can now browse your computer for the attachments using the file uploader. You can add as many attachments as you require. When uploaded, you can view an attachment by clicking its name, to remove the attachment click the red cross icon. When all required attachments have been added, click on the "Next" button to proceed to the next screen.



[ITT Attachment.docx](#)

When complete click **Continue** to move onto the next page, **Reset** to begin the wizard again and remove all info, **Cancel** to leave the wizard completely (without saving) or **Back** to return to the previous stage.

Terms and Conditions

The next stage asks whether you accept the Terms & Conditions associated with this tender. You can view the terms by clicking on its name in blue, which will open the Terms and Conditions documents attached.

Then you must select Accept or Decline, and if you do not agree you must specify the reasons why you do not agree in the space provided.

Create ITT response

Details Item Breakdown Attachments **4** Terms & conditions

Please follow the link to read the terms and conditions

[Standard Legal Terms](#)

Accept
 Decline

Finish Reset Cancel Back

When complete click **Finish** to go back to the summary screen, **Reset** to begin the wizard again and remove all info, **Cancel** to leave the wizard completely (without saving) or **Back** to return to the previous stage.

Submitting The Tender Response

When all information is added you can submit the response by clicking **Submit response**. You will be required to reconfirm this by clicking Submit response for a second time.

My response 25 **Draft**

Terms & conditions - Accepted [Decline](#)

[Standard Legal Terms](#)

Item breakdown [Edit](#)

Item description	Quantity	Unit of measure	Comments	Price
Uniform				
Branded Jumpers (Mens)	500	per jumper		£5,000.00
Branded Cardigan (Womens)	500	per cardigan		£4,500.00
Total				£9,500.00

[Export](#)

Time remaining

Respond by: 14 March 2015 21:30

2 Days 4 Hours 49 Minutes 5 Seconds

Response controls

[Submit response](#)

[Open response wizard](#)

Submission checklist

- Terms & conditions
- Attachments

Attachments [Add](#)

- [ITT Attachment.docx](#) 12 KB

If the Submit response button is greyed out, the Submission checklist can be used to pick out why (anything with a red box will need revisiting.)

Submission checklist

- Terms & conditions
- Attachments

Editing Tender Response and Re-Submission

An important feature that is available after the tender response has been submitted is the ability as a Supplier to edit this response before the submission time and date has passed.

All the procuring organisation will see, is the version number of the response, but no previous submissions, providing they are all returned on time (further information on this later).

To edit a response from the tender summary screen, click **Create new version**.

The screenshot shows the tender summary screen for 'Cheshire - ITT' with 41 items. The main details section includes the title 'Example ITT', a description 'Example ITT', and a response deadline of '03/14/2015 21:30:00'. The public attachments section lists two documents: 'ITT Attachment.docx' (12 KB) and 'Specification & Requirements Document.docx' (12 KB). The terms & conditions section includes a link to 'Standard Legal Terms'. The time remaining section shows 2 days, 4 hours, 40 minutes, and 32 seconds. The messaging section indicates 1 unread message. The response controls section has links for 'I would like to make a response' and 'No longer wish to respond'. The my responses section shows 'Version 1' submitted on 12/03/2015, with a 'Create new version' button.

When this is clicked it will create a draft Version 2.

The screenshot shows a button labeled 'My response' with '26 Draft' next to it, indicating the number of draft responses.

Each area can then be amended, either by editing the relevant section or clicking **Open response wizard**, and then submitted using the process outlined above.

The screenshot shows the 'Item breakdown' table and the 'Response controls' section. The table has columns for 'Item description', 'Quantity', 'Unit of measure', 'Comments', and 'Price'. The first row shows 'Uniform' with a quantity of 500 and a unit of measure of 'per'. The 'Response controls' section includes a 'Submit response' button, a link to 'Open response wizard', and a 'Submission checklist' section.

Managing Account Details

If at any point you need to alter/update your personal details or account information then you can do this from the **Your Account** section of the system. This area is accessed by logging into the portal and then clicking on the option in the top right of the screen.

The screenshot shows the top navigation bar with links for Home, Find opportunities, My activities, Chris Cox, Your account, and Logout. Below the navigation bar is a search bar with a dropdown menu for 'All opportunities', a search input field, and a 'Go' button. The main content area is titled 'Home page' and contains two summary cards. The first card, 'News and announcements', lists two news items: 'French sports stars die in Argentina' and ''Terror apologists must share blame''. The second card, 'Company details summary', shows details for 'Cox & Clifton', including the address '1 DN Support, Support Town, Northumberland, NE23 1LZ', a description 'Support', and a 'Keywords' section.

Changing your Password

To change your Password or Memorable Information used to login to the portal, click **Edit** within the *Login details* section.

The screenshot shows the 'User details' section. The 'Location' card displays 'Organisation: Cox & Clifton'. The 'Login details' card, which has an 'Edit' link, displays 'User name: chris.cox', 'Memorable word: *****', and 'Password: *****'.

To make changes to your password or memorable information you must firstly add your **Current Password**. You can then add your **new password** (must be inserted twice) and new memorable information/hint as required.

Edit login details

Current Password

New Password

Your password must be between 8 and 12 characters long, contain a mixture of UPPERCASE and lowercase letters and also at least 1 numeric.

Confirm new password

Once the changes have been made, click **Update login details** from the bottom of the page or Click **Cancel** to return to your account without making changes.

[Update login details](#) [Cancel](#)

Updating your Personal Details

From the Your Account page you can also update your own personal contact information by clicking **Edit** within the *Contact details* section.

Contact details [Edit](#)

Name: Mr Chris Cox

Job title: Support

Email address: chris.cox@due-north.com

Telephone: 01670597120

Fax:

Mobile:

Address: 1 DN Support
Support Town
NE23 1LZ

This will open the *Update contact details* screen, and from here you can change and update your contact information as necessary.

Update contact details

User name

Title **First name** **Surname**

Job title

Email address **Confirm email address**

Telephone Number

Fax number (optional)

Mobile number (optional)

You can also select a different contact address by clicking **Change address** if required. This will bring up a list of existing addresses linked with this account. To select a contact address, mark the **radio button** to the left of the relevant address.

Update contact details

Address	Town	County	Postcode	Country
<input checked="" type="radio"/> 1 DN Support,	Support Town	Northumberland	NE23 1LZ	United Kingdom

Use this address **Create new address** [Cancel](#)

The **Create new address** button can be used to add a new address to the list. Enter the details and click **Create address** when complete. That new address will be made available for selection.

Create new address

Address line 1

Address line 2 (optional)

Town

County

Postcode

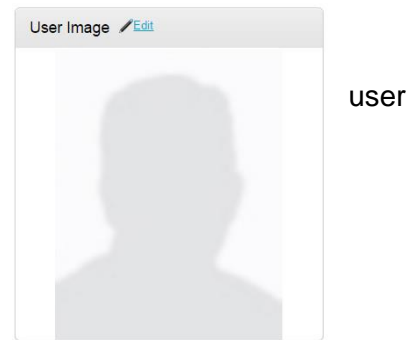
Country

Create address [Cancel](#)

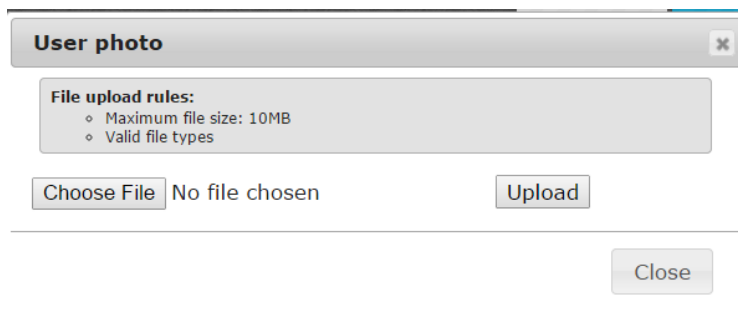
Click **Update contact details** from the options at the bottom of the page when all details have been changed, or **Cancel** to return without making any changes.

Updating your User Image

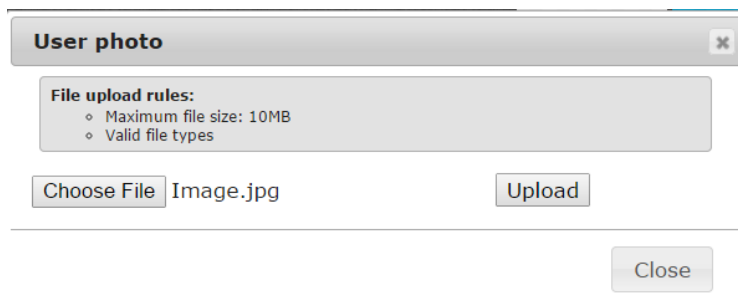
From the Your Account page you can also update your image by clicking **Edit** within the *User Image* section.



This will now allow you to choose an image/file to upload. Select **Choose File** and navigate to the desired file.



Once the **image/photo** is selected, click **Upload**.

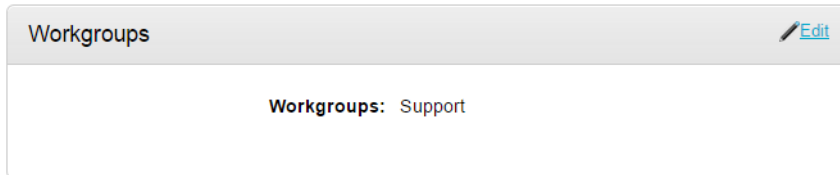


This will now be shown within the *User Image* area of Your Account.



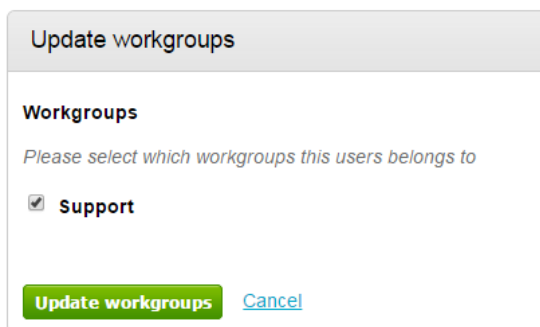
Updating Workgroups

From the Your Account page you can also update the workgroup you belong to by clicking **Edit** within the *Workgroups* section. (**Note:** This ability to change your assigned workgroups is only available if you have the role of Company Administrator or Workgroup Administrator.)



The screenshot shows a grey header bar with the text "Workgroups" on the left and a blue pencil icon followed by the text "Edit" on the right. Below the header, the text "Workgroups: Support" is centered in a white box.

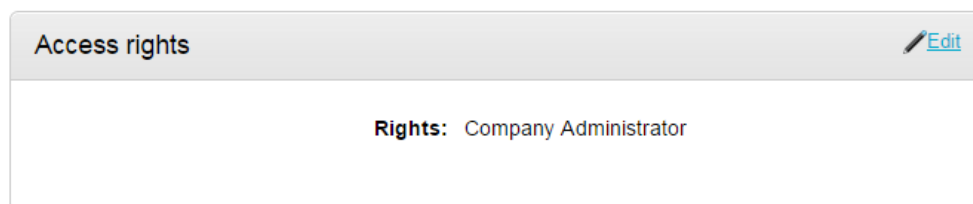
Tick the **boxes** to the left of any workgroups you belong to, and click [Update workgroups](#).



The screenshot shows a dialog box with a grey header bar containing the text "Update workgroups". Below the header, the text "Workgroups" is followed by the instruction "Please select which workgroups this users belongs to". There is a single checkbox labeled "Support" which is checked. At the bottom of the dialog, there are two buttons: a green "Update workgroups" button and a blue "Cancel" link.

Updating Access Rights

From the Your Account page you can also update your rights by clicking **Edit** within the *Access Rights* section. (**Note:** This ability to change your access rights is only available if you have the role of Company Administrator.)



The screenshot shows a grey header bar with the text "Access rights" on the left and a blue pencil icon followed by the text "Edit" on the right. Below the header, the text "Rights: Company Administrator" is centered in a white box.

There are 3 roles available;

Company Administrator – You will have full access to view and edit Company details, with the ability to create and edit accounts/contact within the Company profile. You can also edit workgroups and user roles.

Workgroup Administrator – You will be able to add new workgroups to the Company account, and change which users sit within each workgroup. However, if only this role is selected they will not get full company administrator rights.

Basic – If neither of the above are ticked, then you will have Basic supplier rights, you can change your own contact details, but gain none of the access mentioned above.

Tick the **roles** that apply, and then click **Update rights**.

Update Access Rights

Rights (optional)

Please check all that apply. This information is used for reporting purposes only.

Company Administrator

Workgroup Administrator

Update rights [Cancel](#)

Viewing Audit History

There is also the option to view the **Audit History** linked to this account.

Audit history

[View audit history](#)



Audit History for Chris Cox

Date and time	Description	Actioner
09/03/2015 14:15:06	User created via company approval	Mr Buyer One
10/03/2015 10:35:44	User Contact details updated	Mr Chris Cox
10/03/2015 10:37:31	User Contact details updated	Mr Chris Cox
10/03/2015 11:31:06	User updated their photograph	Mr Chris Cox

Close