Supplier Portal

1

User guide for using the supplier portal

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Introduction

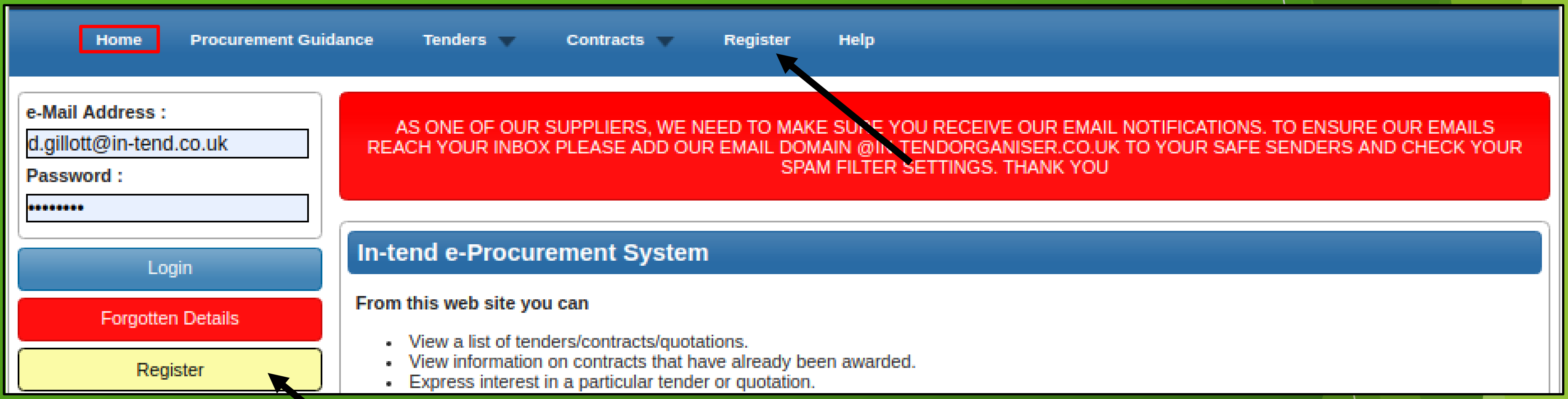
The following information will assist you in using this e-tendering / Contract Management system.

Once you have registered, you will be able to maintain your company information, return tender submissions and maintain company/contract documentation in a secure area via the internet.

If you encounter any difficulties whilst using the system you can contact our Support team by phoning 0845 557 8079 or emailing support@in-tend.co.uk

Registration

Registering on the e-Tendering system



From the homepage click on Register

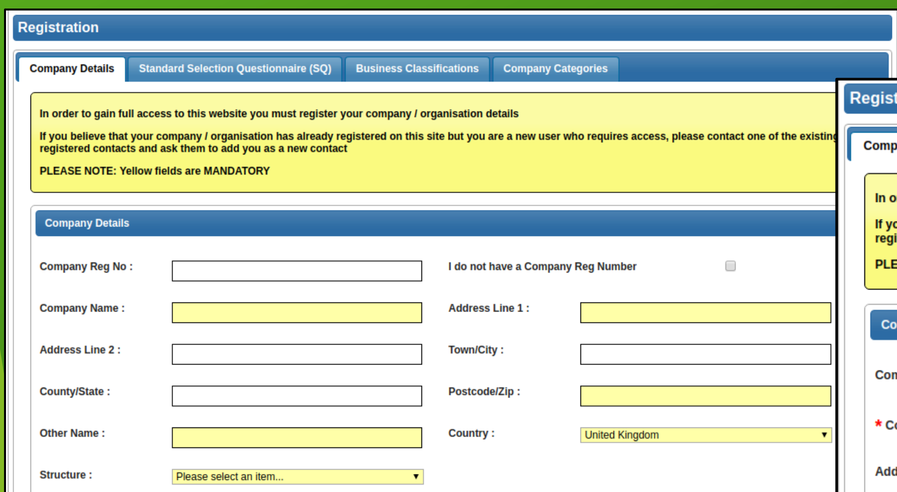
Note: Colour schemes and banners may differ depending upon the portal accessed.

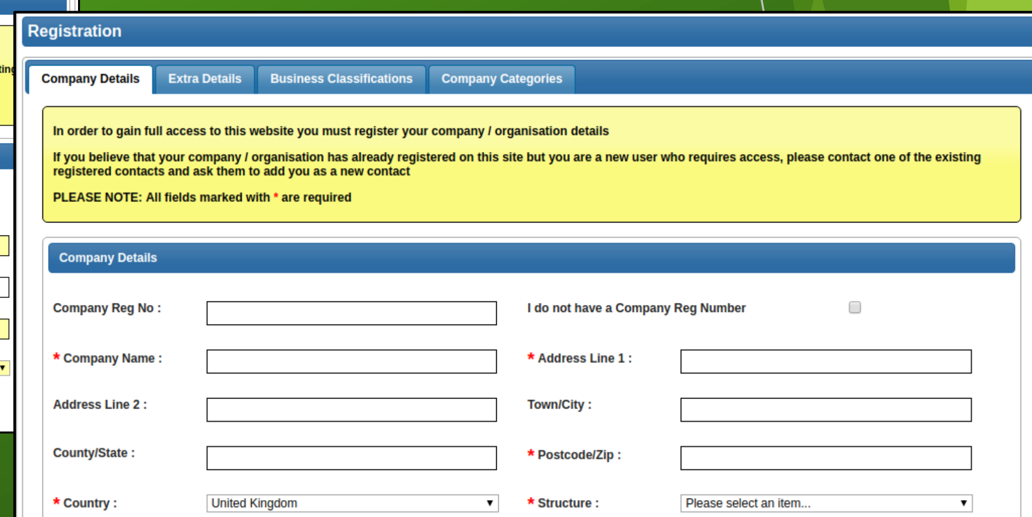
Registration

Registration process

As part of the simple registration form you will be asked to complete your Company Details, Contact Details and Primary User Details.

All mandatory fields are indicated by either the red asterisk *or* highlighted as yellow Mandatory information may also be required against any of the additional tabs





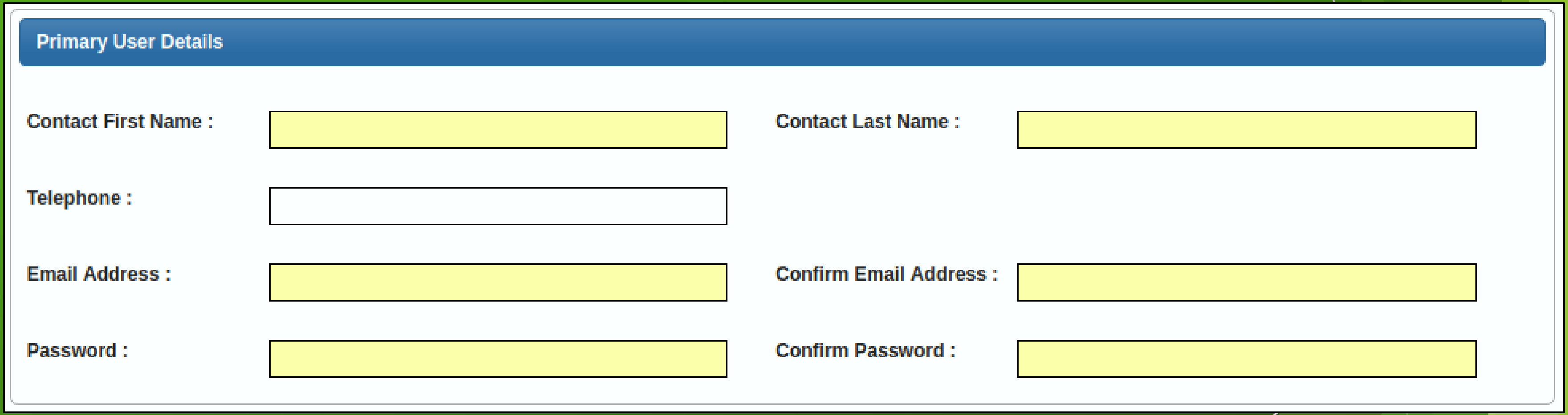
Note: Mandatory fields are indicated by Yellow *or* Red Asterisk

Registration

Registration process

Email alerts and actions will be sent to the email addresses you provide, so if possible it is useful to enter a general company email address in the Primary User Details section such as info@ *****.co.uk.

The email address and password should be duly noted as this will be required when logging into the site.

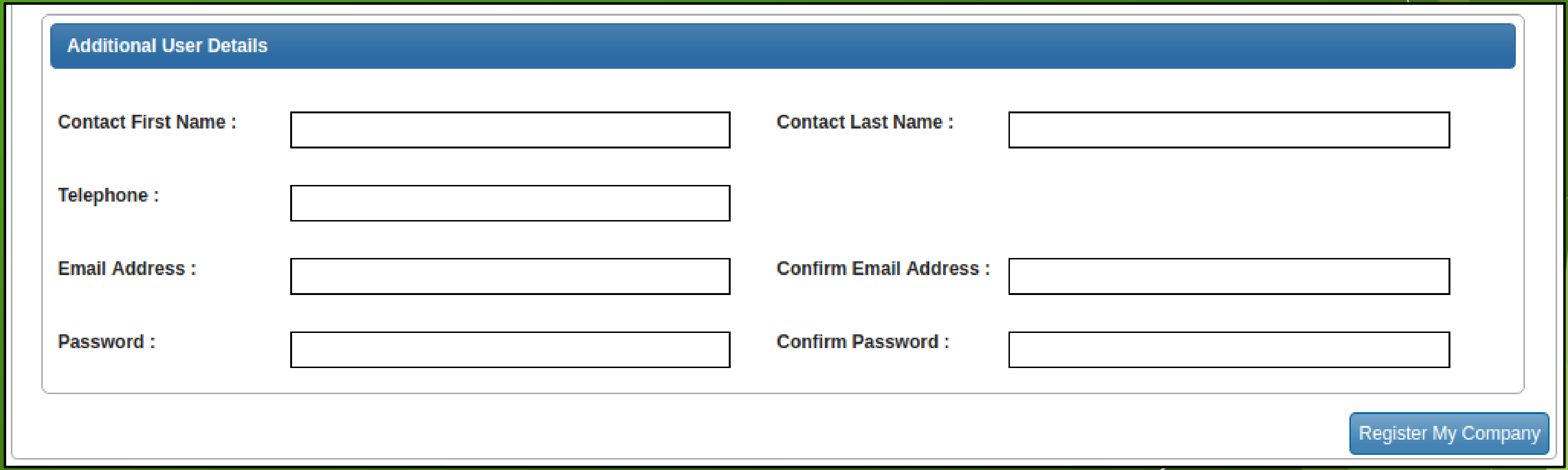


Registration

In addition to the primary user, we strongly recommended adding an ‘Additional User’ as a secondary point of contact for your company.

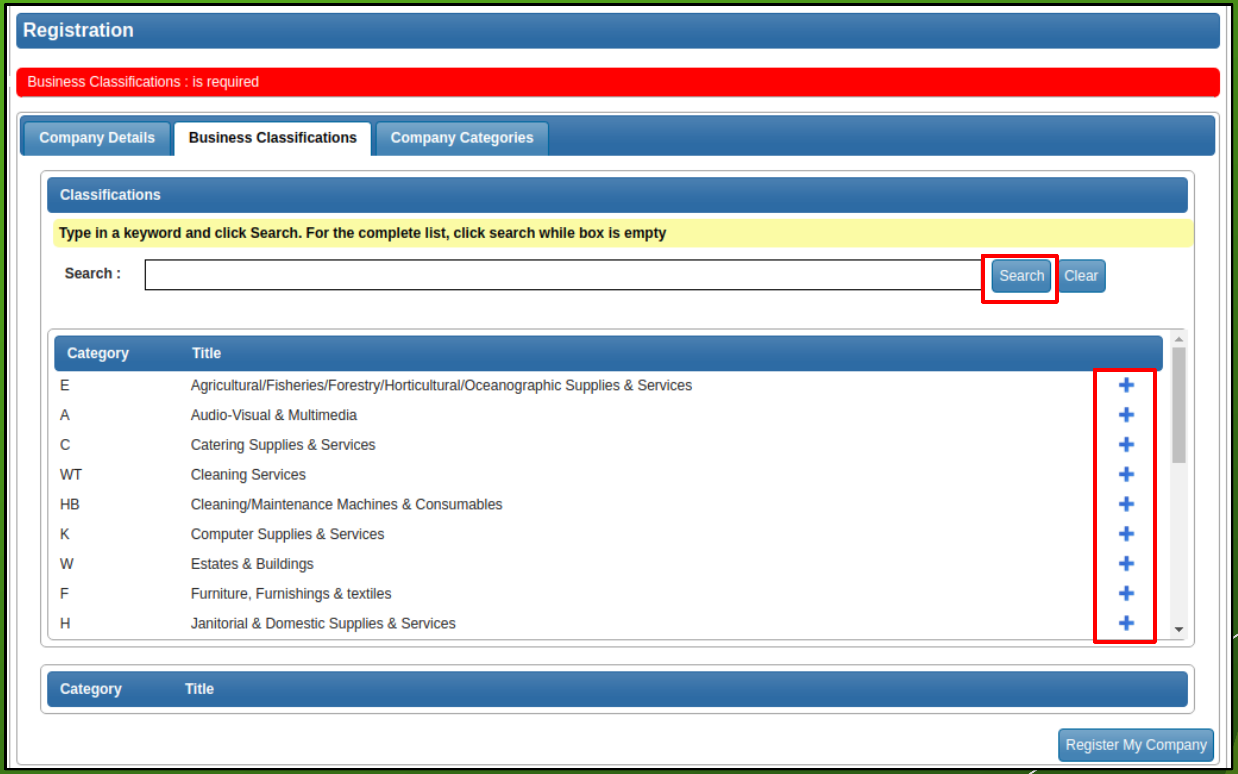
Doing so will allow them to also gain access to the site and receive a copy of any related emails.

You may only add **one** additional point of contact at registration, however after the registration is complete you may login to your account and add as many additional contacts as required.



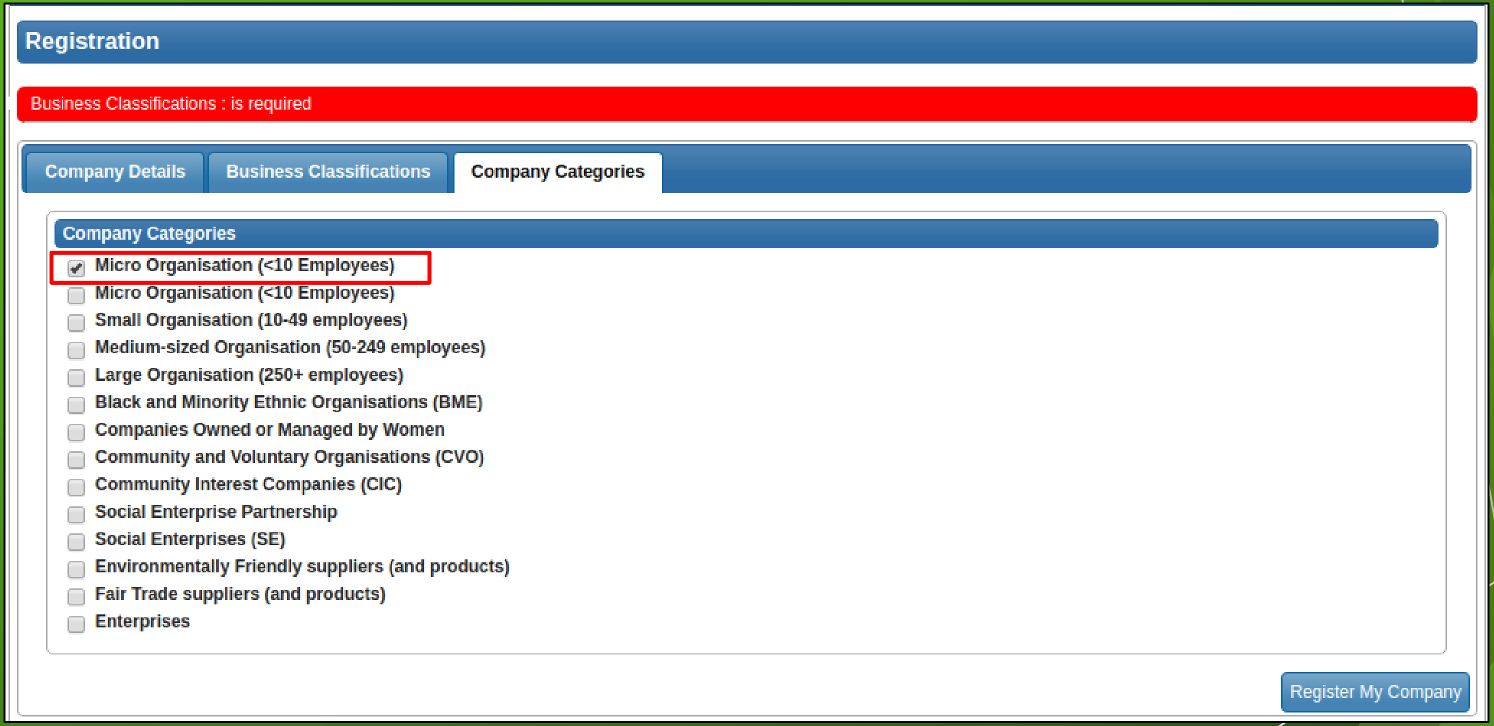
Registration

In most cases the **Business Classifications** will be mandatory requiring you to select at least one business classification before you can register. Enter a keyword *or* click on the search button to see the full list of available categories. Click the blue + symbol to add a category you require. Multiple categories can be selected as required.



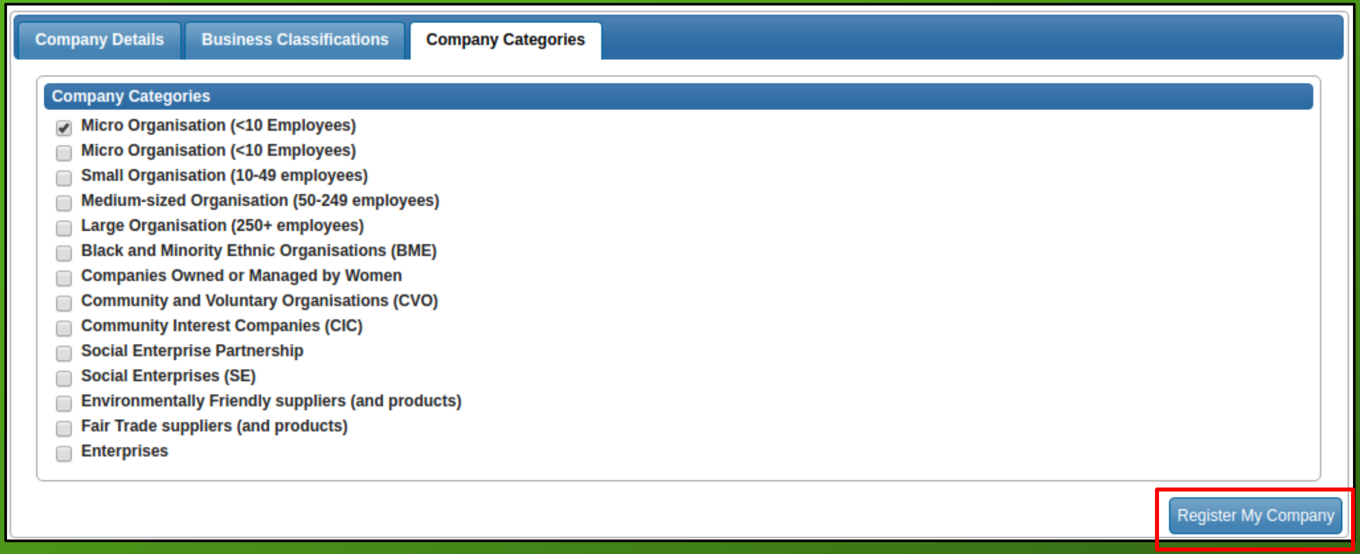
Registration

In the **Company Categories tab** you are able to tick any of the categories that apply to your company.



Registration

Once you have completed the required information click on **Register My Company**



You should not register your company more than once, unless they are under a separate company registration number.

If your company has several locations, register the company against the head office and add contact details for individuals at the different locations.

You can add one additional user at the time of registration. Once registered, you can add several contacts in the **Company Details** section.

Registration

Once registration is complete, the system will then thank you for registering and inform you that your details are being processed.

Registration Complete

Thank you for registering

Thank you for registering with the In-Tend electronic tendering web site.

Confirmation E-Mail

Your details are awaiting processing, and each contact will be sent an email to confirm their registration has been accepted.

These e-mails will contain the automatically system generated User ID, as well as a reminder of the e-mail address.

Upon receipt of the registration e-mail you will be able to login to your secure area of the web site.

Shortly after you will receive an email* with confirmation of your registration.

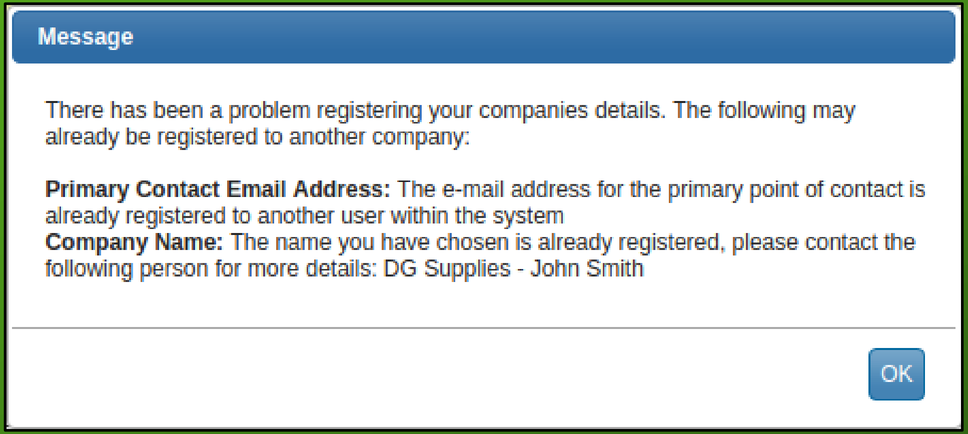
**Some systems may send a verification email containing a one time entry security code.*
In such cases the verification email will contain a secure link which may be used in conjunction with the security code provided.

Registration

Registration Troubleshooting

If your company has already been registered by another user *or* the system detects duplicate information from an existing account, then you may receive an error message as show below.

If this happens, there are two options available to allow you to resolve this:



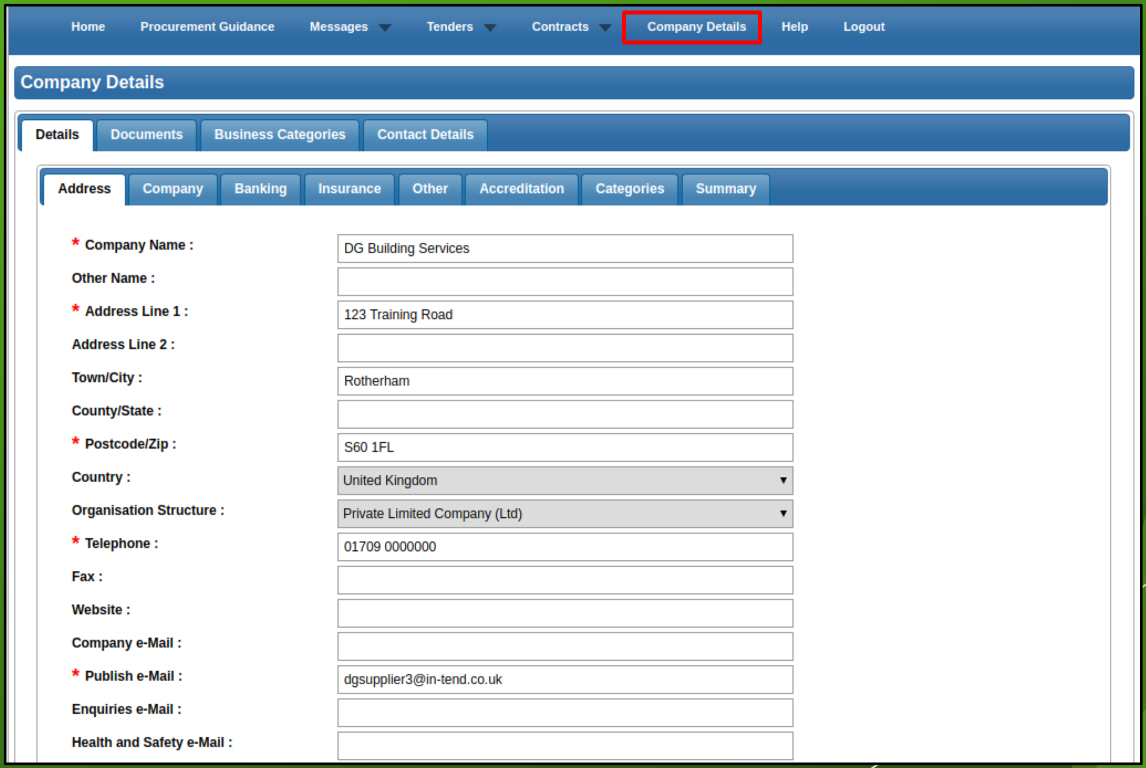
1. Contact the user specified against the company that is already registered and ask them to add you as an additional user to the existing company account.

2. If the user registered against the account has left your organisation you can contact the buyer directly using the number found within the 'Help' section of the portal to arrange recovery.

Managing your Details

If you need to update your company information you can do this by logging into the system and navigating to the **Company Details** section on the top menu bar.

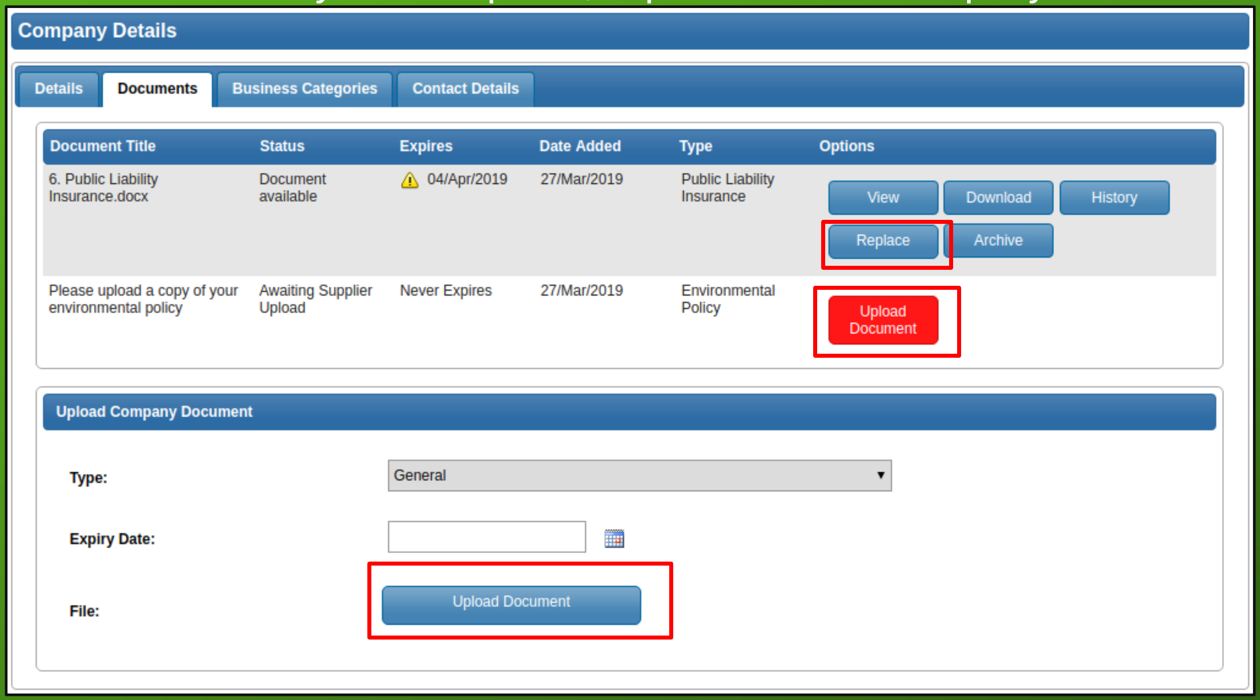
From here you can edit/add information regarding the company, contact details, company documents and business classifications.



Managing your Details

Managing Company Documents

From the documents tab you can upload, replace or view company related documents.

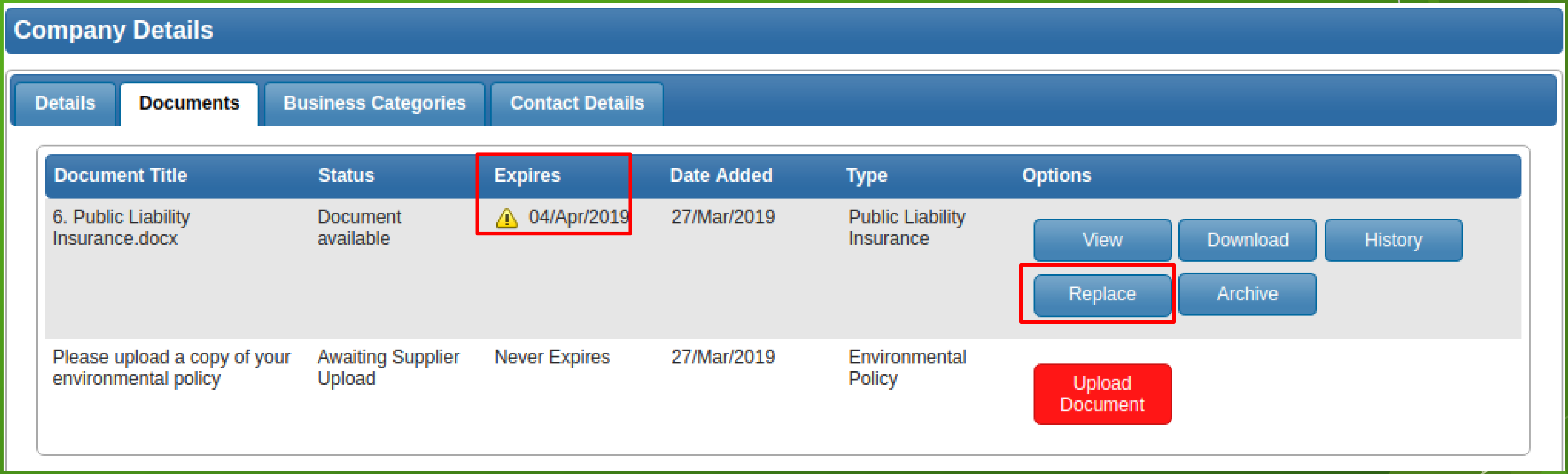


Note: On some systems, company documents may automatically get stored in this area when you upload the same document type as part of a tender submission. This provides a benefit of allowing this same document to be used repeatedly, if asked for again on different tender opportunities or for use within contract records.

Managing your Details

Managing Company Documents

Where documents have been uploaded with expiry dates the system will start sending reminder emails shortly before the expiry date to inform you that the document should be updated.



Company Details

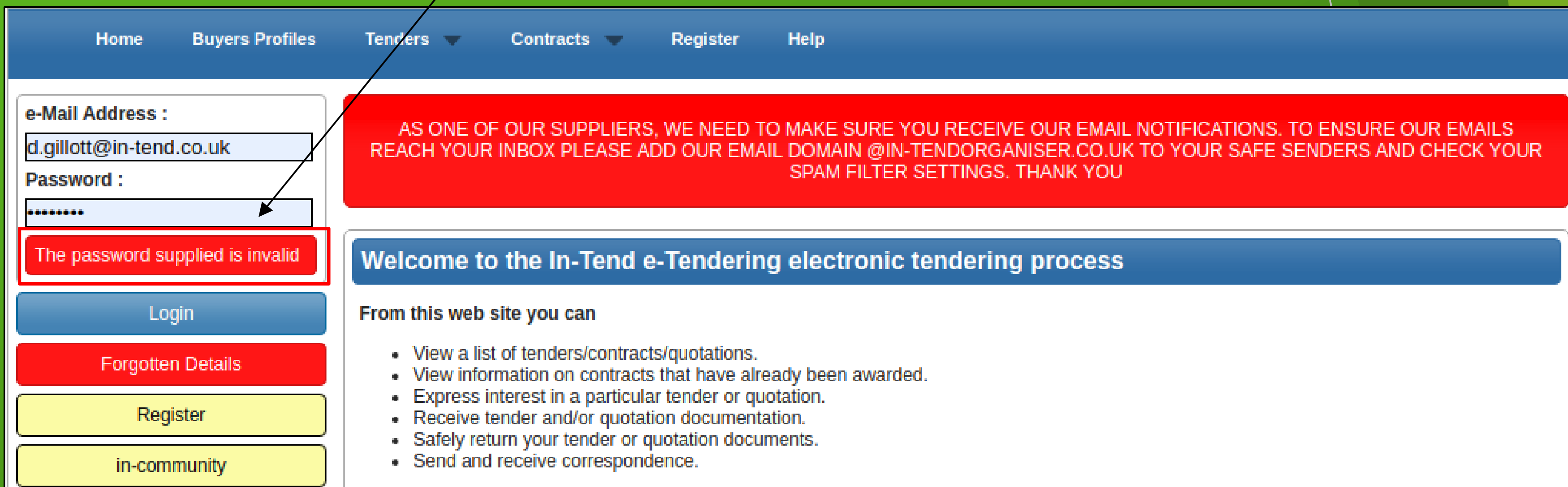
Details | Documents | Business Categories | Contact Details

Document Title	Status	Expires	Date Added	Type	Options
6. Public Liability Insurance.docx	Document available	04/Apr/2019	27/Mar/2019	Public Liability Insurance	View Download History Replace Archive
Please upload a copy of your environmental policy	Awaiting Supplier Upload	Never Expires	27/Mar/2019	Environmental Policy	Upload Document

To update the expiring document and CANCEL the notification emails, click the 'Replace' button of the expiring document and upload a new copy.

Account Locked Out

The system will only allow for three bad login attempts.

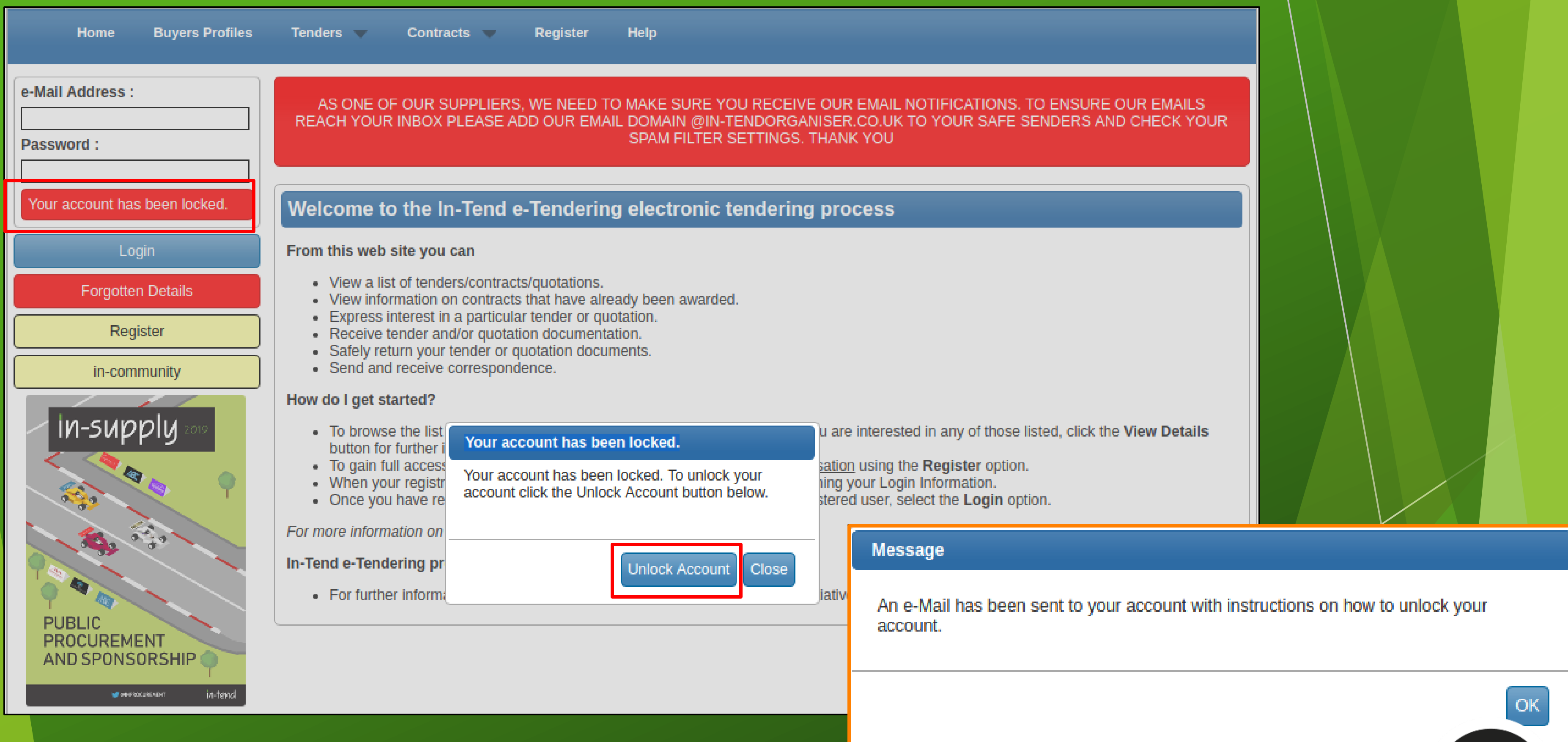


If you are unsure of the password then the 'Forgotten Details' button can be used to recover the password via the email address that you registered against.

If the password is entered incorrect three consecutive times then your account will become locked out.

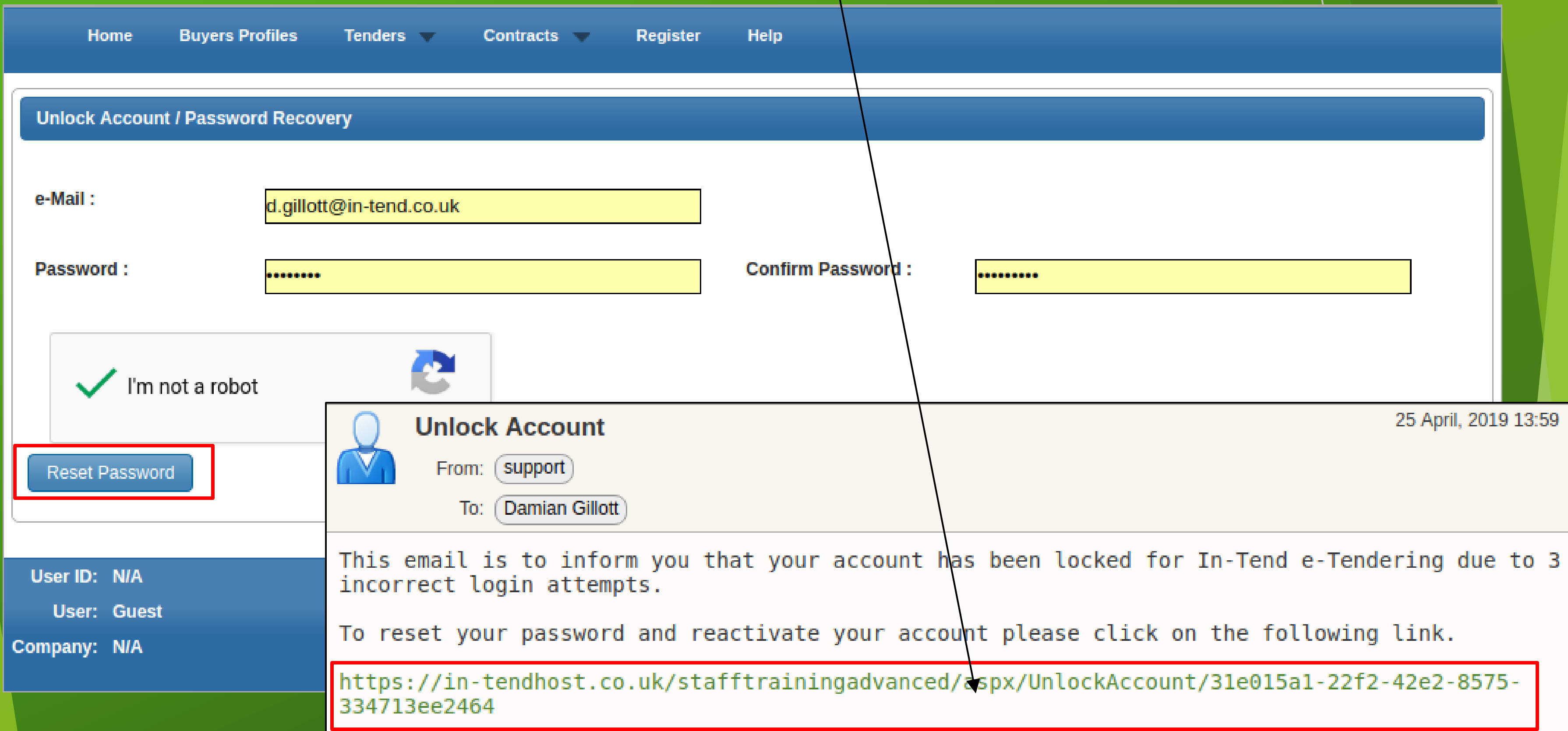
Account Locked Out

If you are locked out of your account then follow the on screen instructions to unlock your account and reset your password. Clicking 'Unlock Account' will send an email with an account recovery link.



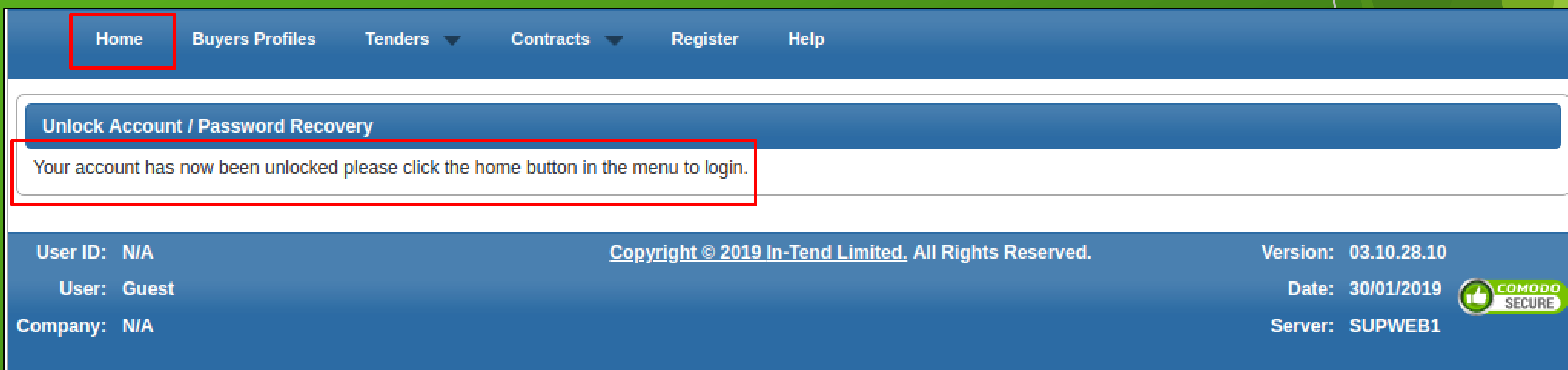
Account Locked Out

When you receive the recovery email, please click the secure link which will take you to the access password recovery screen.



Account Locked Out

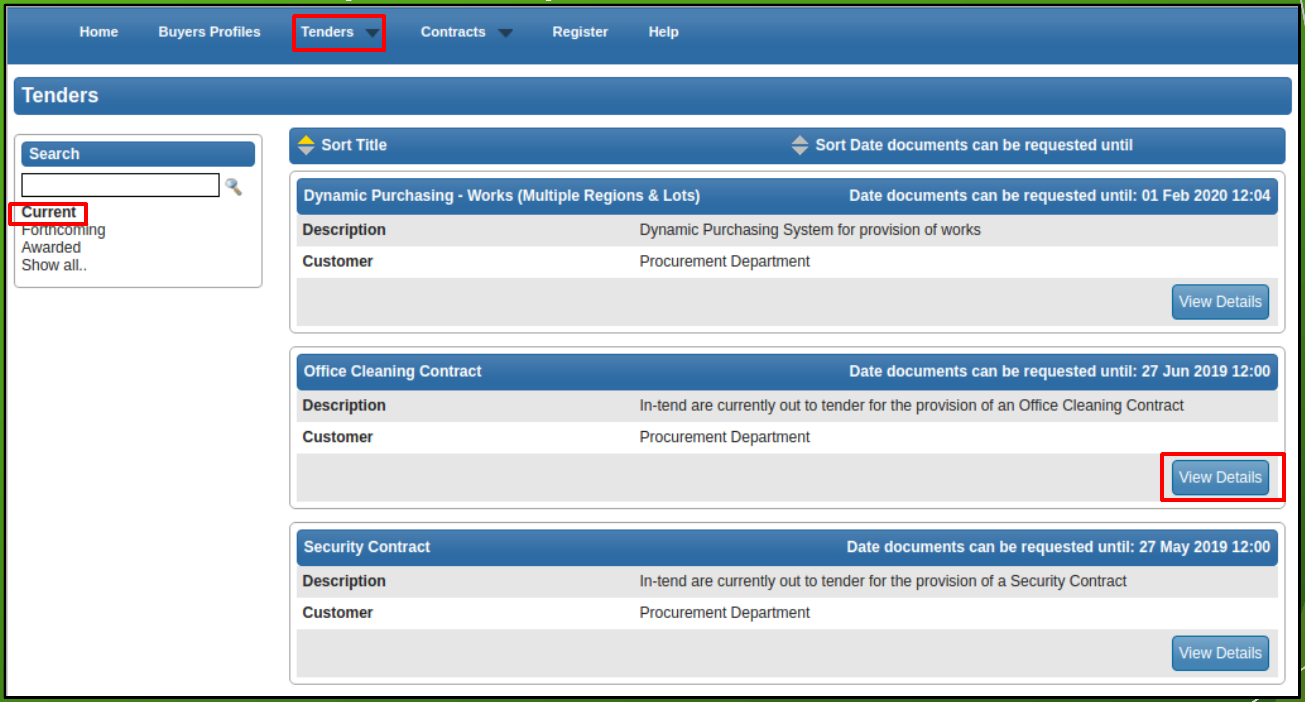
Once you have unlocked your account, you can log into the system by clicking the 'Home' link and entering your updated login details.



Tender Opportunities

There are two possible ways of taking part in a tender process within the system.

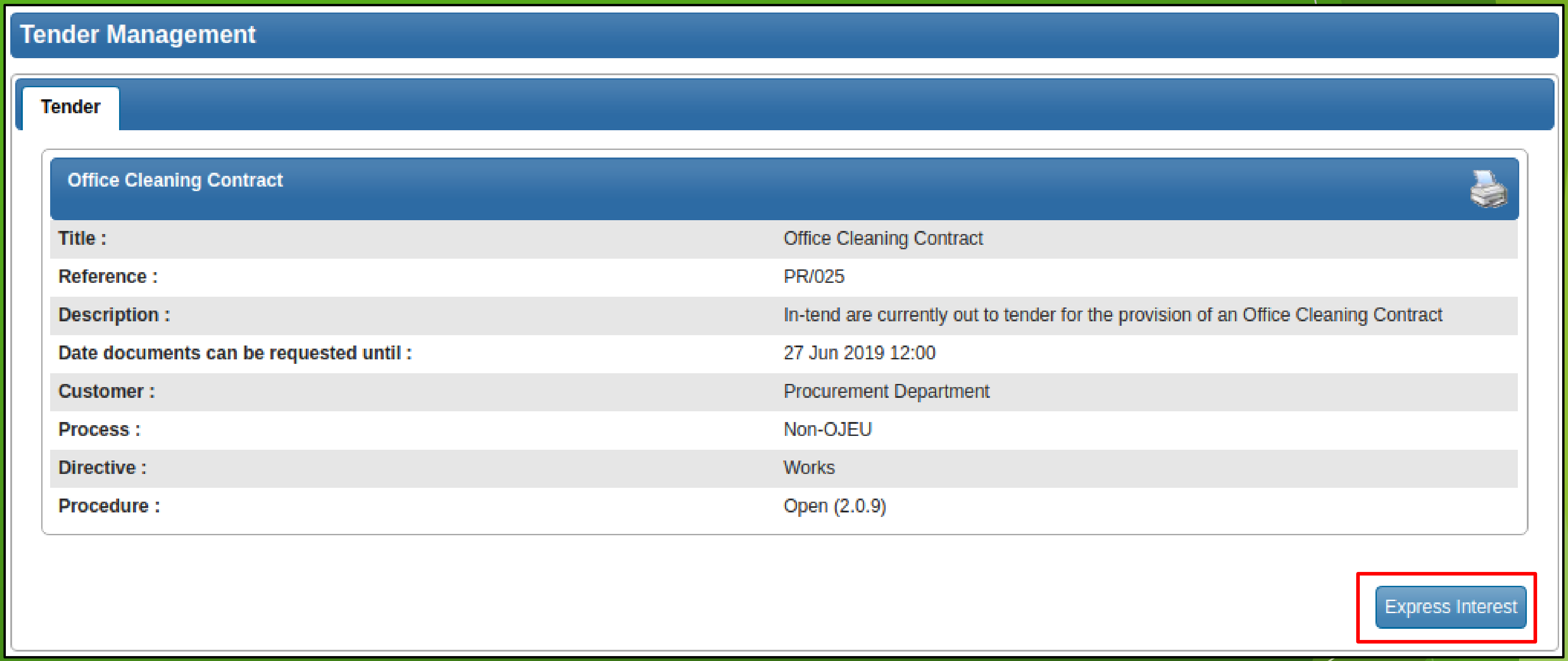
1. Browsing the list open tenders and expressing your interest.
2. Direct invitation from the buyer authority.



To browse open tender opportunities hover over the **Tenders** section at the top menu bar and then click on **Current**, this will provide you with a full list of current tender opportunities being advertised. For a tender that you are interested in you should click **View Details** to access further information.

Tender Opportunities

To take part in the tender opportunity click the '**Express Interest**' button.



Tender Management

Tender

Office Cleaning Contract

Title :	Office Cleaning Contract
Reference :	PR/025
Description :	In-tend are currently out to tender for the provision of an Office Cleaning Contract
Date documents can be requested until :	27 Jun 2019 12:00
Customer :	Procurement Department
Process :	Non-OJEU
Directive :	Works
Procedure :	Open (2.0.9)

Express Interest

Note: *If you are invited by the buying authority to take part in a tender process, you should receive an automated email alert containing the name of the tender. You will need to login into the system and access this project from the '**My Tenders**' section.*

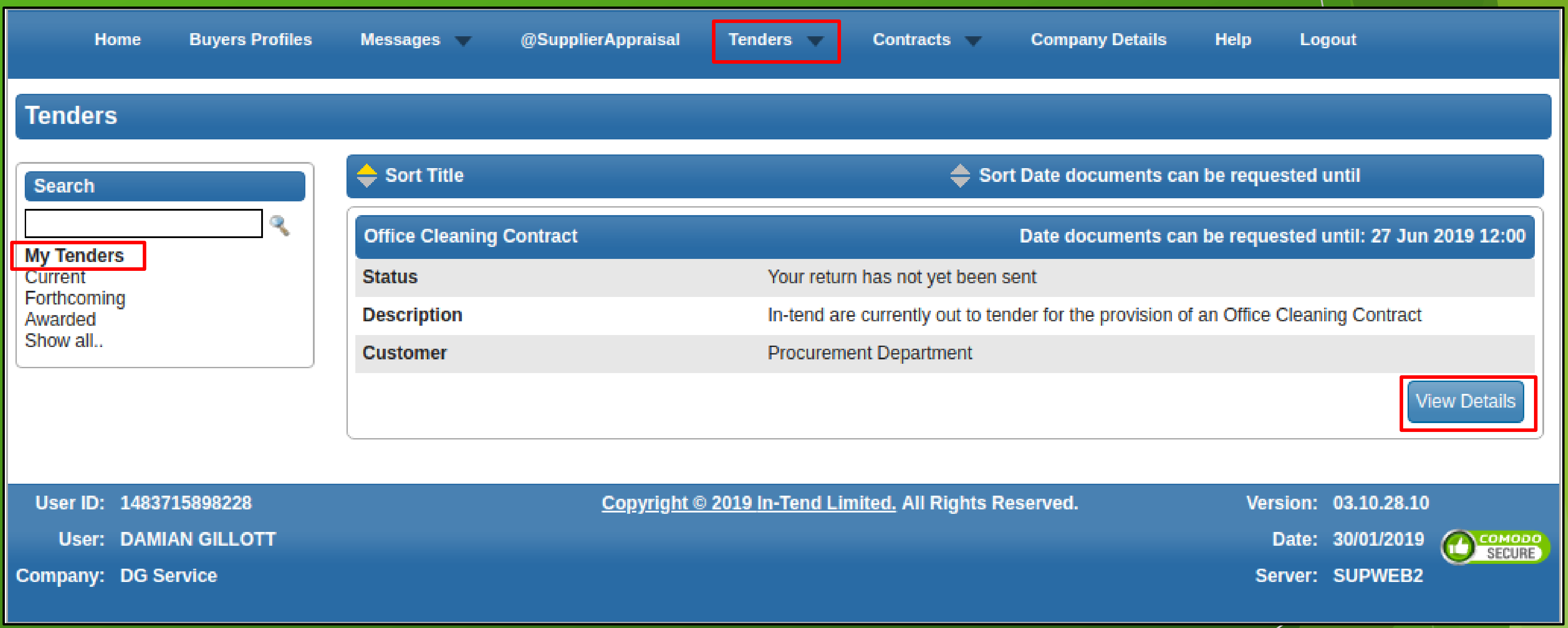
Tender Opportunities

If you are not already logged into the secure area of the portal the system will now prompt you to log in to continue and take part in this tender.

If you are not registered yet, simply click ‘Register’ and follow the registration process.
Note: When you log into the system you will be asked to confirm your expression of interest before being taken directly to the ‘**Tender Management**’ area.

Tender Management

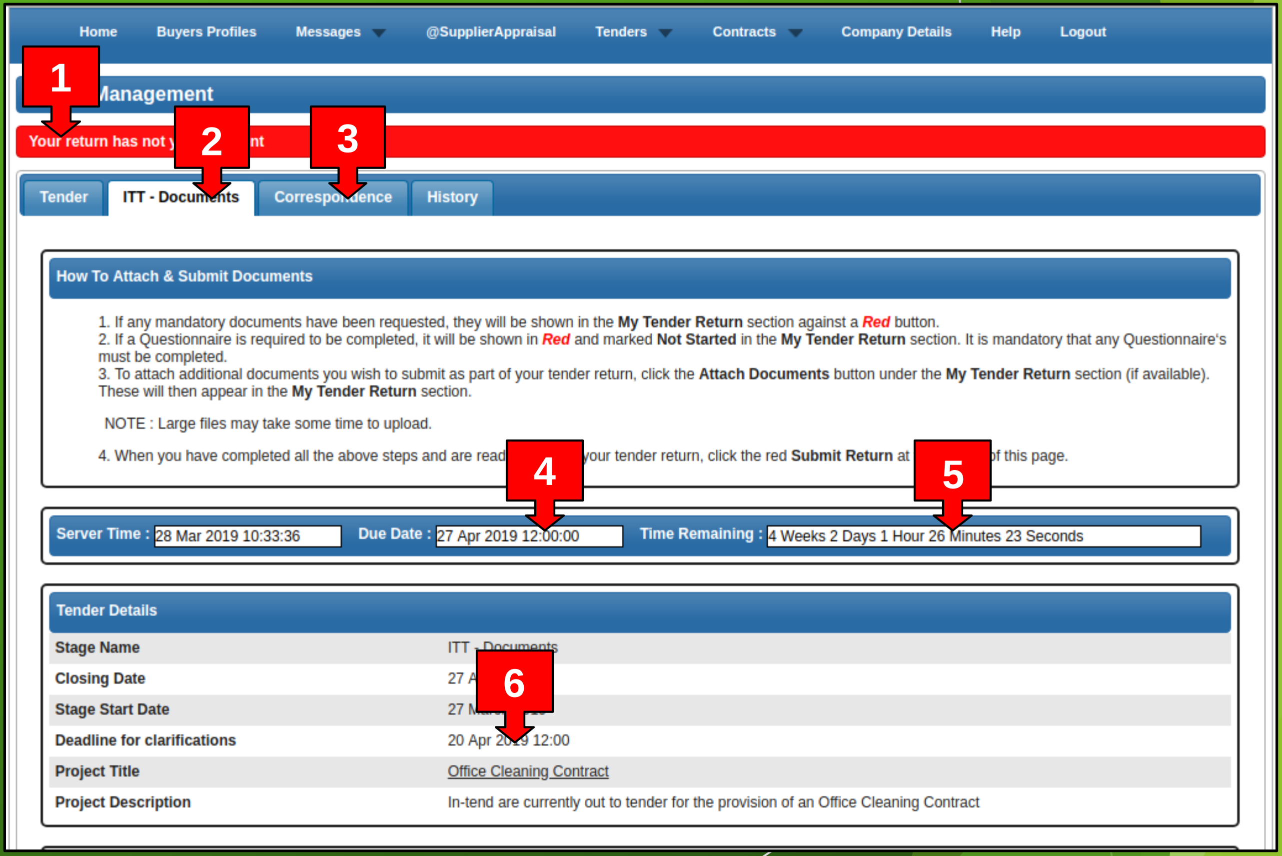
Whether you have been invited directly *or* you have expressed interest in a tender then you will have direct access to the project which can be found in the '**My Tenders**' Section.



Clicking the 'View Details' of a project in the '**My Tenders**' section will take you directly to the tender management screen for that project.

Tender Management

The '**My Tenders**' Section will contain all the required information for taking part in the tender process.



Key Information:

(1) Current status of tender

(2) Stage name

(3) Correspondence area

(4) Tender Deadline

(5) Time Remaining

(6) Deadline for Clarifications

Tender Management

Key Information continued:

(7) Access tender documents

(8) Opt in or Out of the tender*

(9) Complete an online questionnaire*

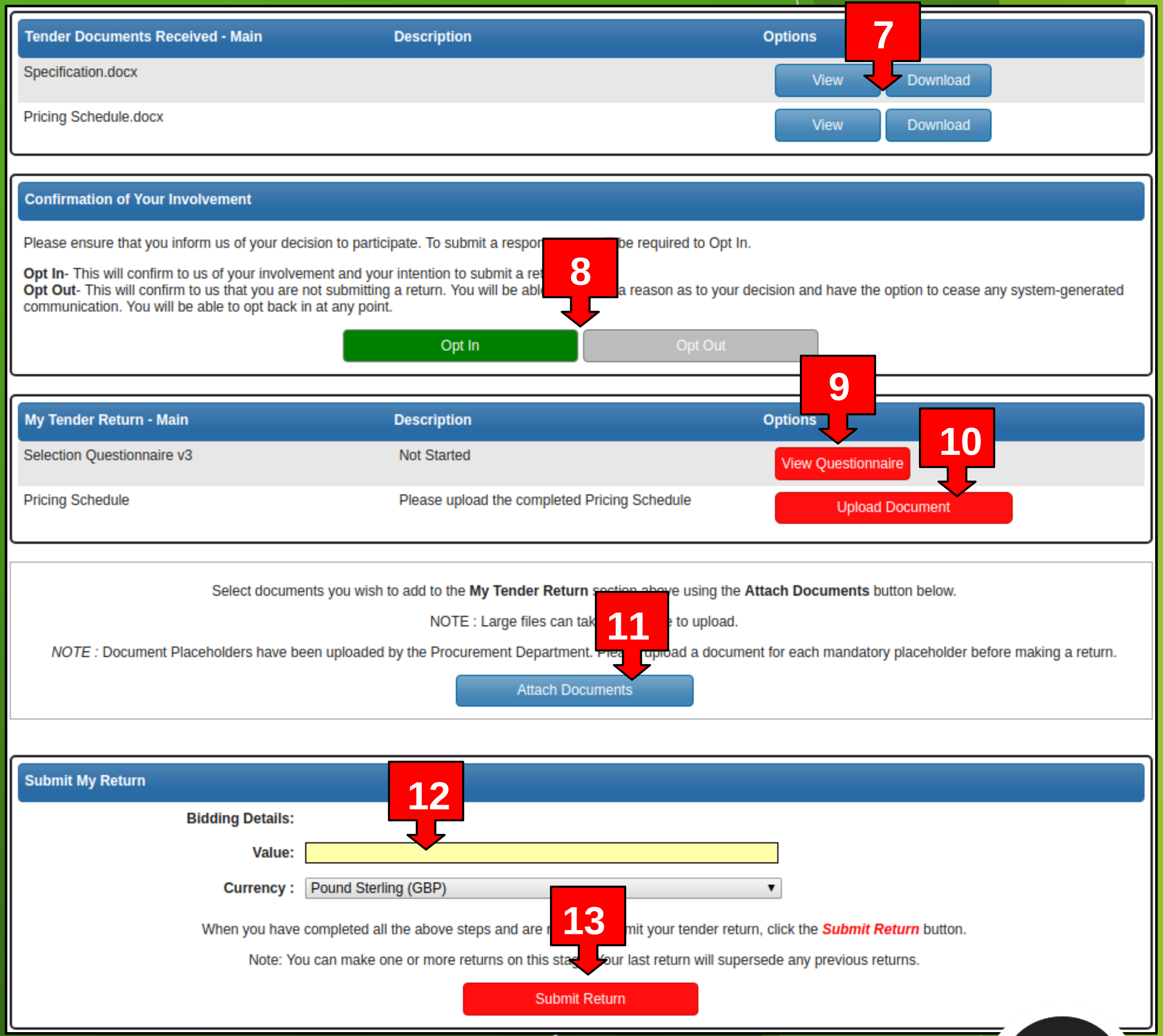
(10) Upload a specific document*

(11) Upload ‘General’ documents*

(12) Enter a total bid value*

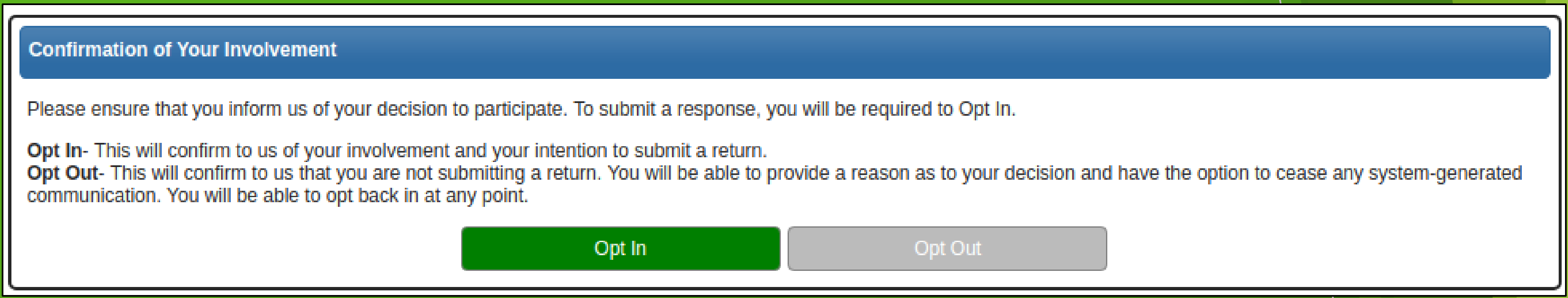
(13) Submit your Tender Return

** Optional items subject to specific tender setup*



Tender Management

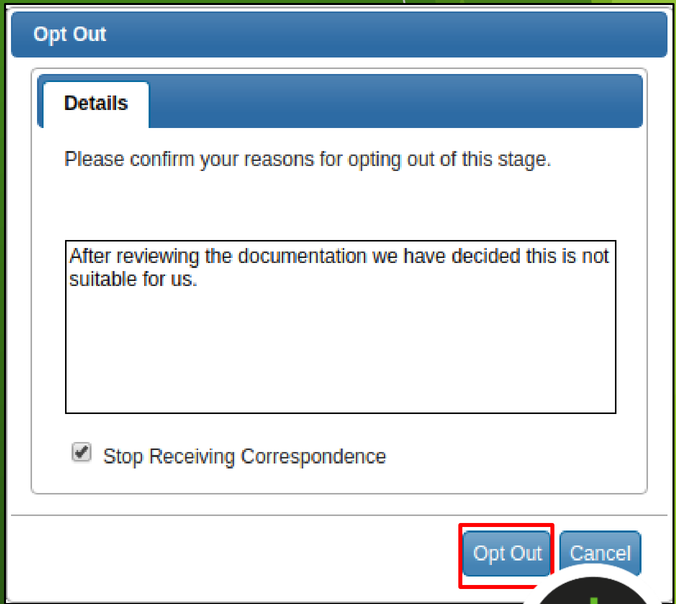
<u>*Opting In or Out of a Tender</u> *(*Subject to setup and may not be available)*



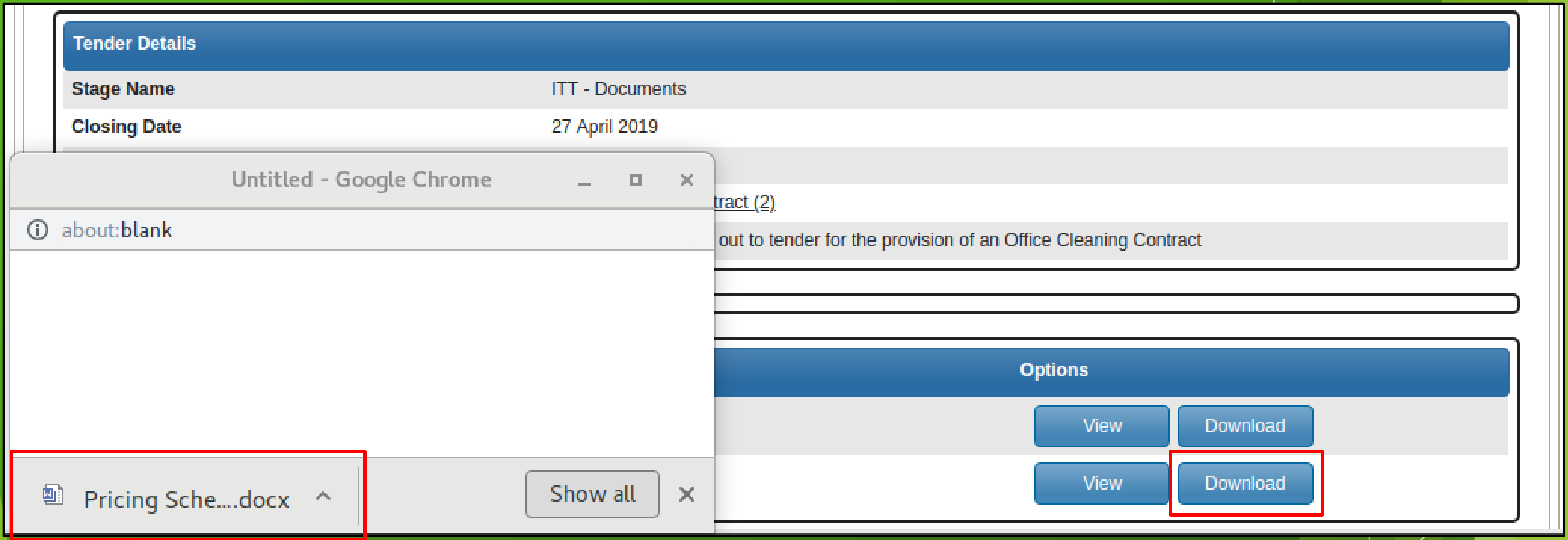
'Opt In' - This confirms your involvement and your intention to submit a bid. Opt In gives access to the 'My Tender Return' area containing any questionnaires, required document uploads and the 'Submit Return' button.

'Opt Out' - This can be selected at any time during the tender process. Opt out informs the buyer you no longer wish to take part in the process. You have the opportunity to enter some feedback comments when selecting the 'Opt Out' button.

When you 'Opt Out' you can specify that you no longer wish to receive automated emails for this tender by selecting 'Stop Receiving Correspondence'. You may opt back in at anytime within the deadline of the tender.



Accessing Tender Documentation

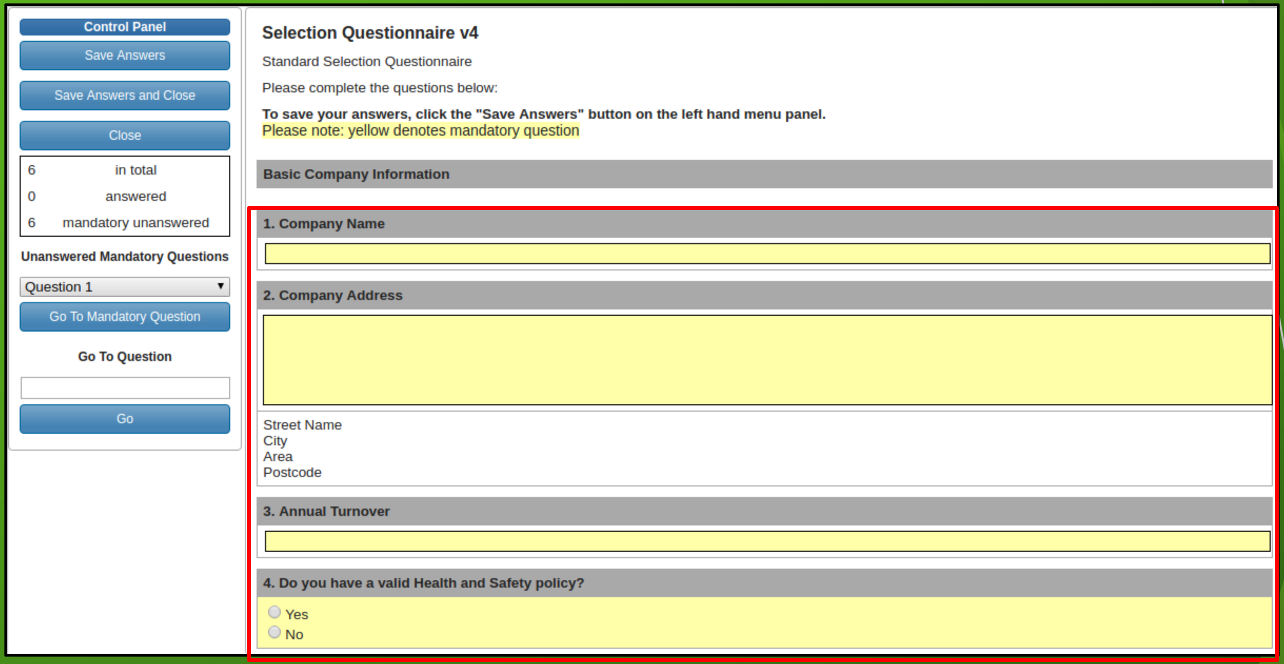


Click on the 'Download' button to save a copy of each file on your computer. A new window should open displaying the file that has downloaded. The file can be found by opening up your standard 'Downloads' folder of your computer.

Note: *If the window that opens appears blank – You may have to use the scroll the window to the bottom in order to see the downloaded file.*

Tender Management

Completing Questionnaires

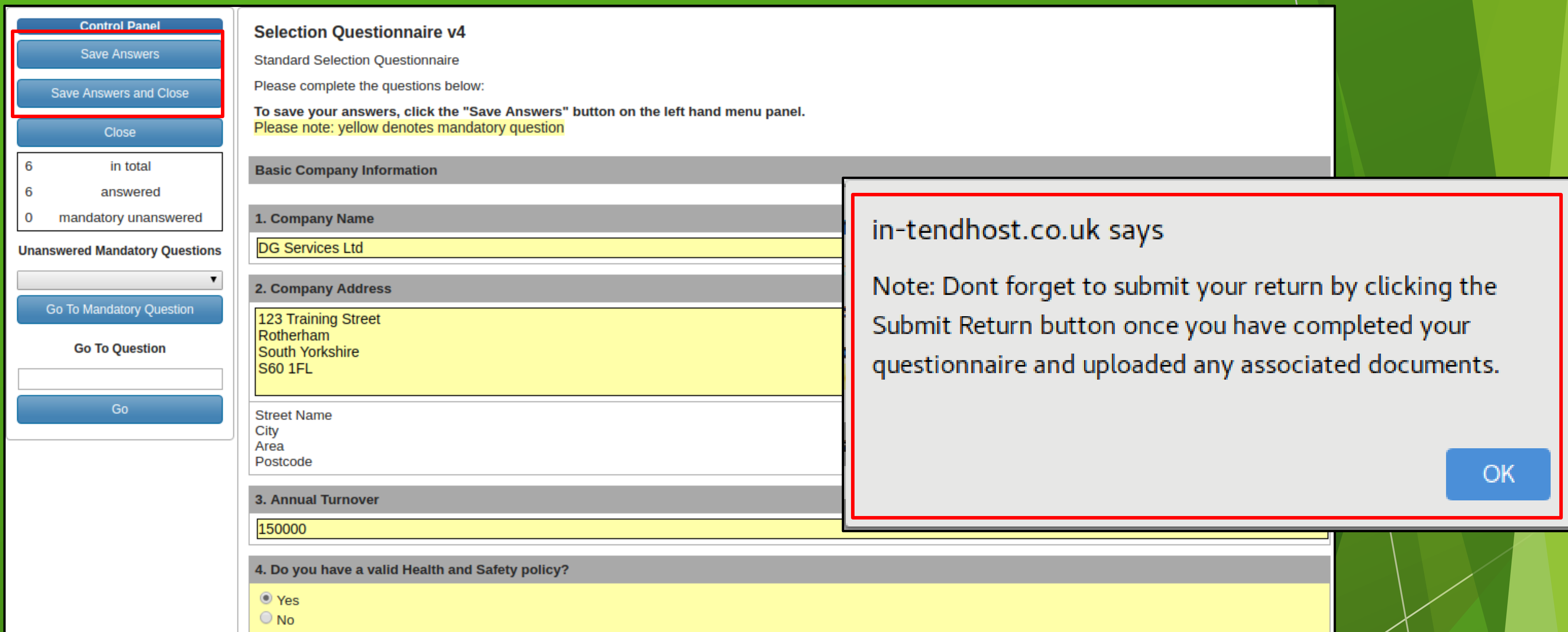


Answer questions as required noting that any questions in Yellow *or* Red Asterisk are mandatory and must be answered before you can submit your tender response. Control buttons at the top left allow for saving & closing etc.

Note: It is important to remain logged into the supplier portal when completing a questionnaire so ensure your browser is not accidentally closed as this may result in a loss of your answers

Tender Management

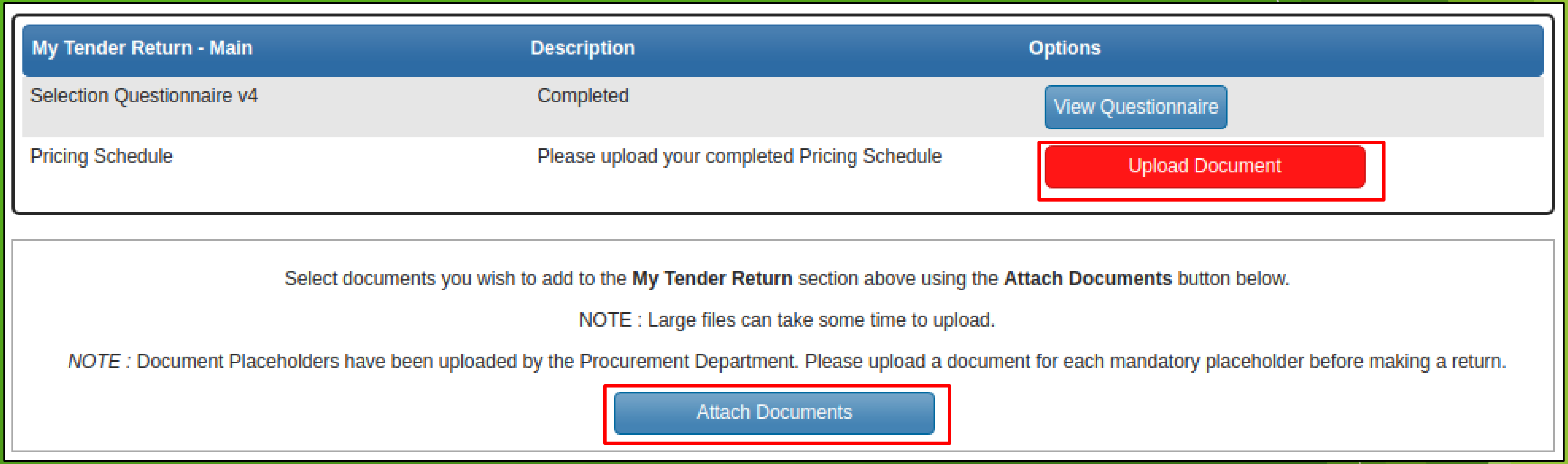
Completing Questionnaires



Answer questions as required noting that any questions in Yellow or Red Asterisk are mandatory and must be answered before you can submit your tender response. Control buttons at the top left allow for saving & closing when complete.

Note: *The system will offer a pop out message to remind you not to forget to submit the return*

Uploading Documents

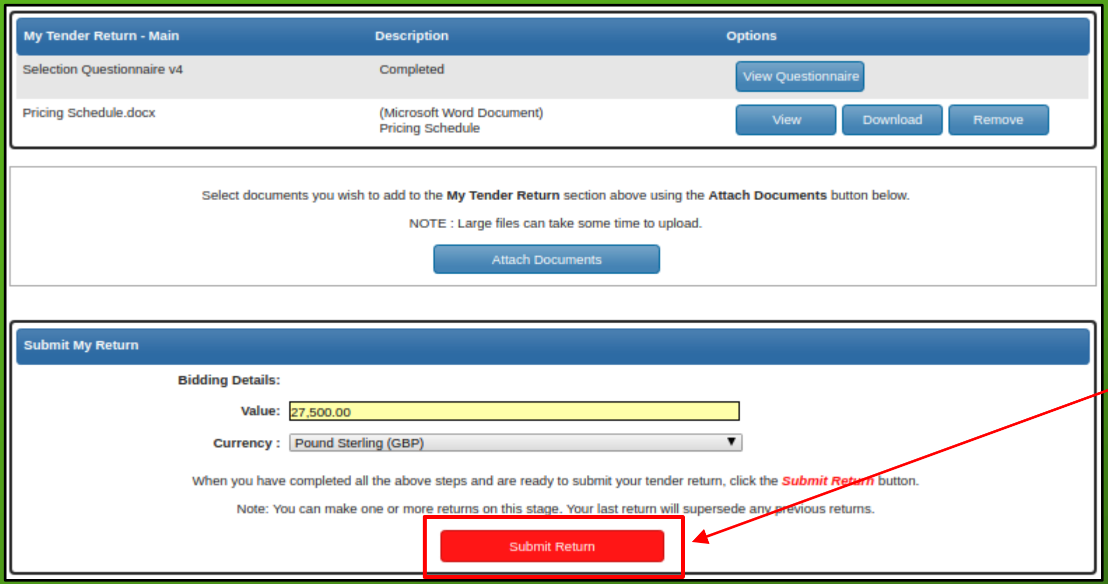


Documents will need to be uploaded in most cases to support your tender submission and should be uploaded into the system as indicated by the buying authority. Specific documents may be asked for via individual upload buttons, alternatively the 'Attach Documents' button may be used (if available) to upload documents when individual Upload Document buttons are not present.

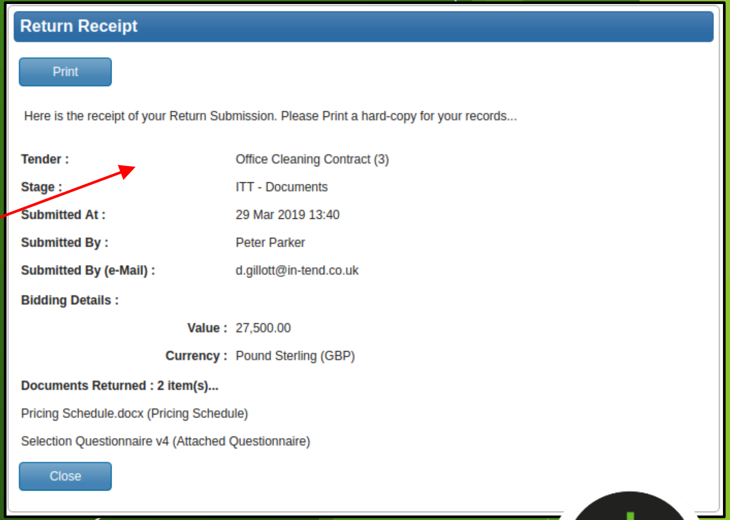
Note: Any red 'Upload Document' button indicates that the document is mandatory and you will not be permitted to 'Submit' your return until the mandatory documents have been uploaded.

Tender Management

Submitting Returns



When all mandatory information has been completed and your tender response is ready, it can be submitted to the Buying Authority using the 'Submit Return button.



After submission, a receipt should open as a pop out window to confirm the submission has been successful.

Note: *Due to individual browser settings this may displayed under other active windows. The receipt will always be available for access under the 'History' tab.*

Modifying your Tender Submission *(If permitted)*

My Tender Return - Main	Description	Options
Selection Questionnaire v4	Completed	View Questionnaire
Pricing Schedule.docx	(Microsoft Word Document) Pricing Schedule	View Download

Return Submitted

You have made a previous return for this tender on **29 March 2019**

It is possible to modify the your return by selecting the 'Modify Return' button. Please note that any documents not included in the subsequent return will not be considered. All tender documents you wish to return must be included in your modified bid as this replaces your first and existing bids.

You must press the 'Submit' button again, in order to submit any subsequent modified returns.

Modify Return

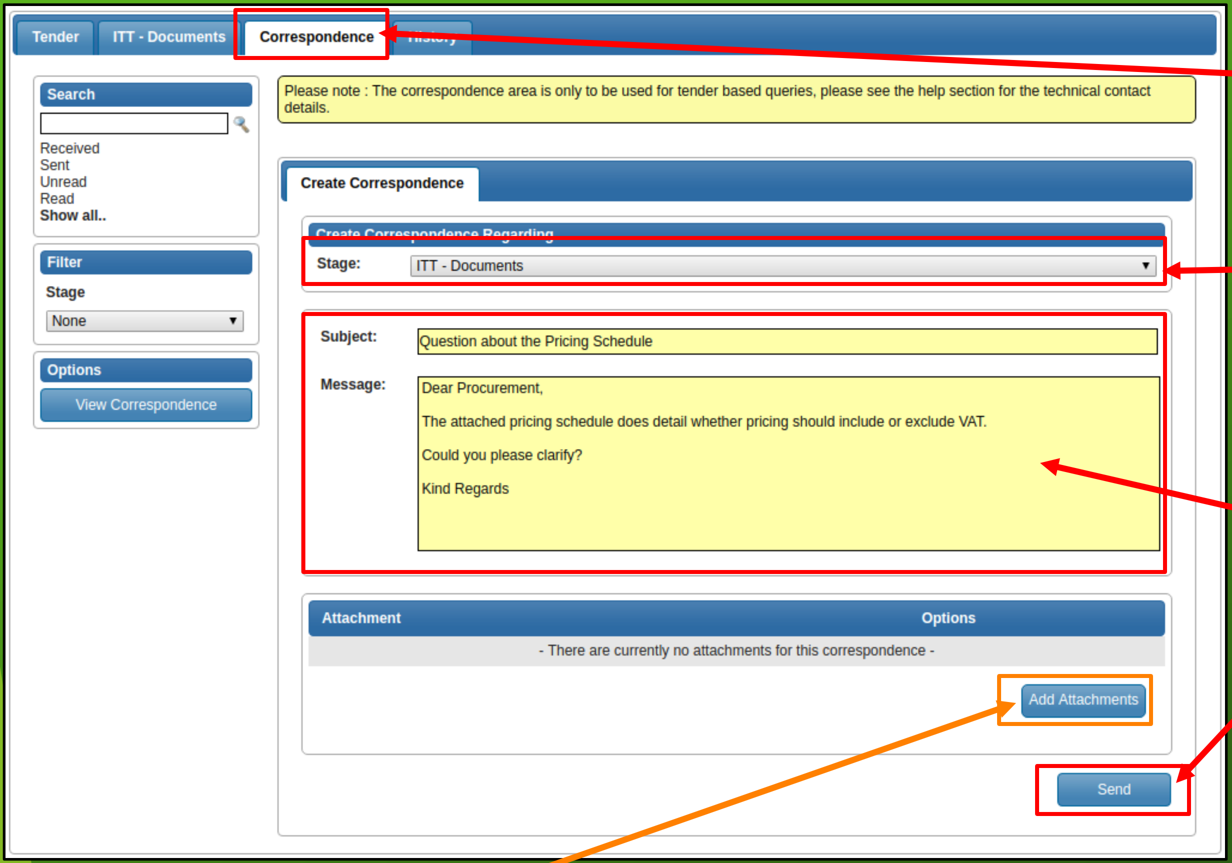
If the buying authority is permitting modifications to the submission then any changes to your submission can be made through the 'Modify Return' button.
Note: This will only be available until the tender deadline.

When the return is being modified you will have full access to the submission allowing for changes of documents, questionnaires and bid value.

IMPORTANT – Don't forget to re-submit the modifications using the 'Submit Return' button again!

Communication

Asking questions about a tender



Clarification questions can be sent to the buyer from within the 'Correspondence' tab of the tender.

For tenders with multiple stages, the question can be made specific to a chosen stage.

A subject and message can be created.

When complete, the correspondence message can be sent to the buyer using the 'Send' button.

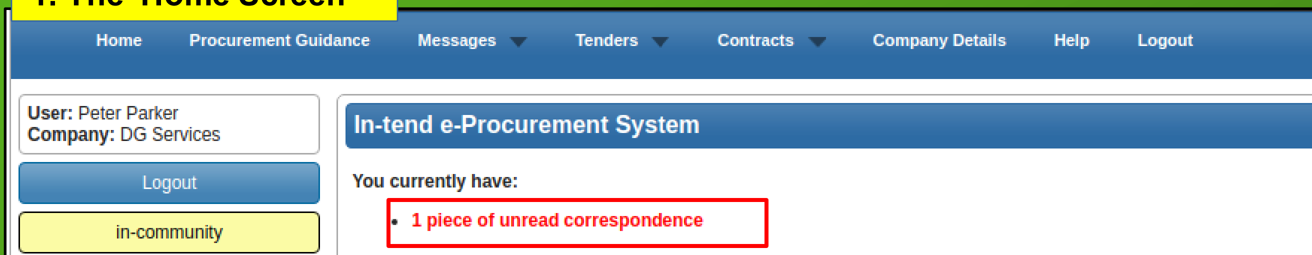
Note: *File attachments should only be added if instructed by the buyer.*

Communication

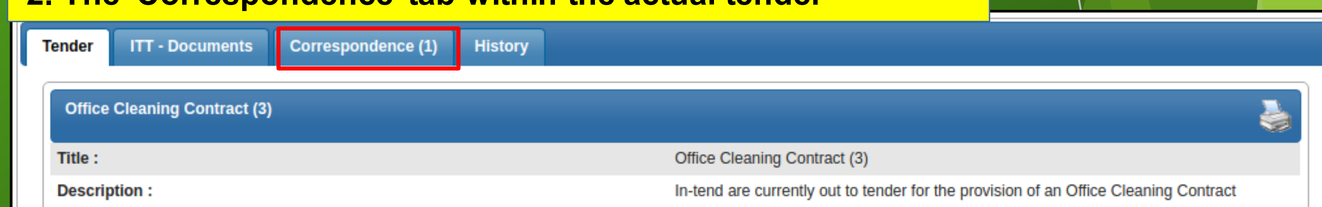
Receiving Correspondence Messages from the Buyer

When the buyer sends you a correspondence message you will receive an automated email notification. The correspondence message can be accessed from three places.

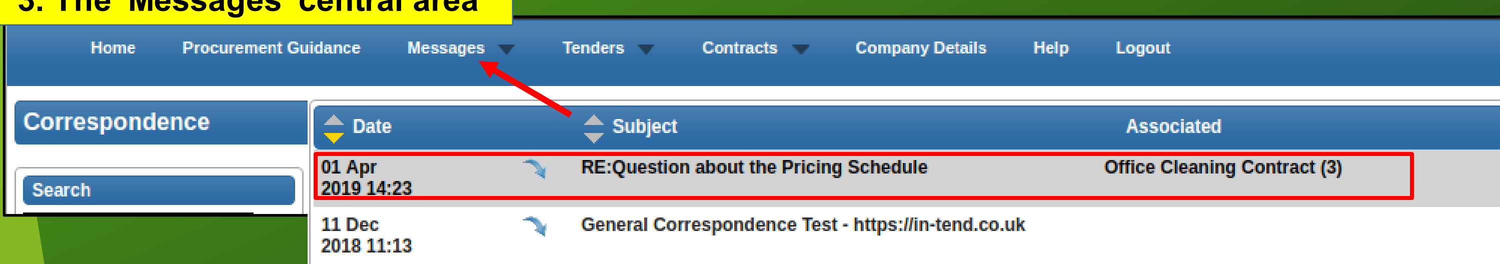
1. The 'Home Screen'



2. The 'Correspondence' tab within the actual tender



3. The 'Messages' central area

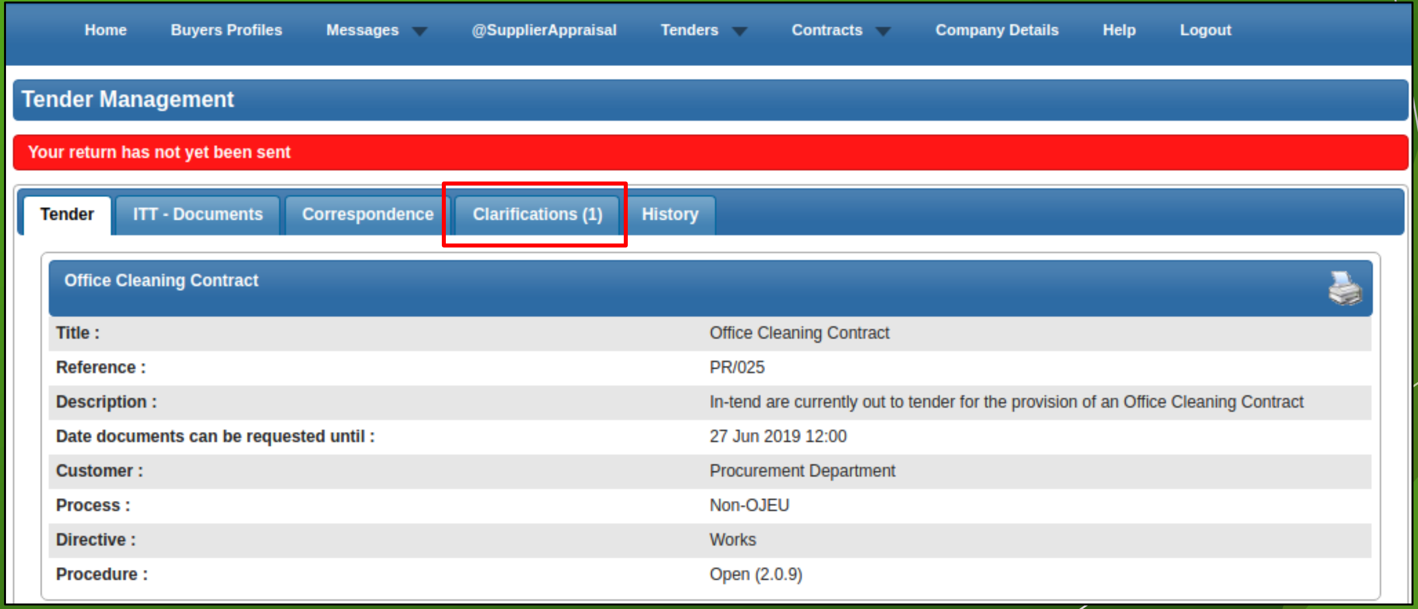


Tender Clarifications

Clarifications issued by the Buying Authority

Tender clarifications may be published by the buyer to inform all potential suppliers of any material changes, missing information or responses to clarifications questions that may have been received regarding the tender.

If a clarification has been published then you will be notified via email and can access the new information under the 'Clarification' tab within the tender management area of the project.



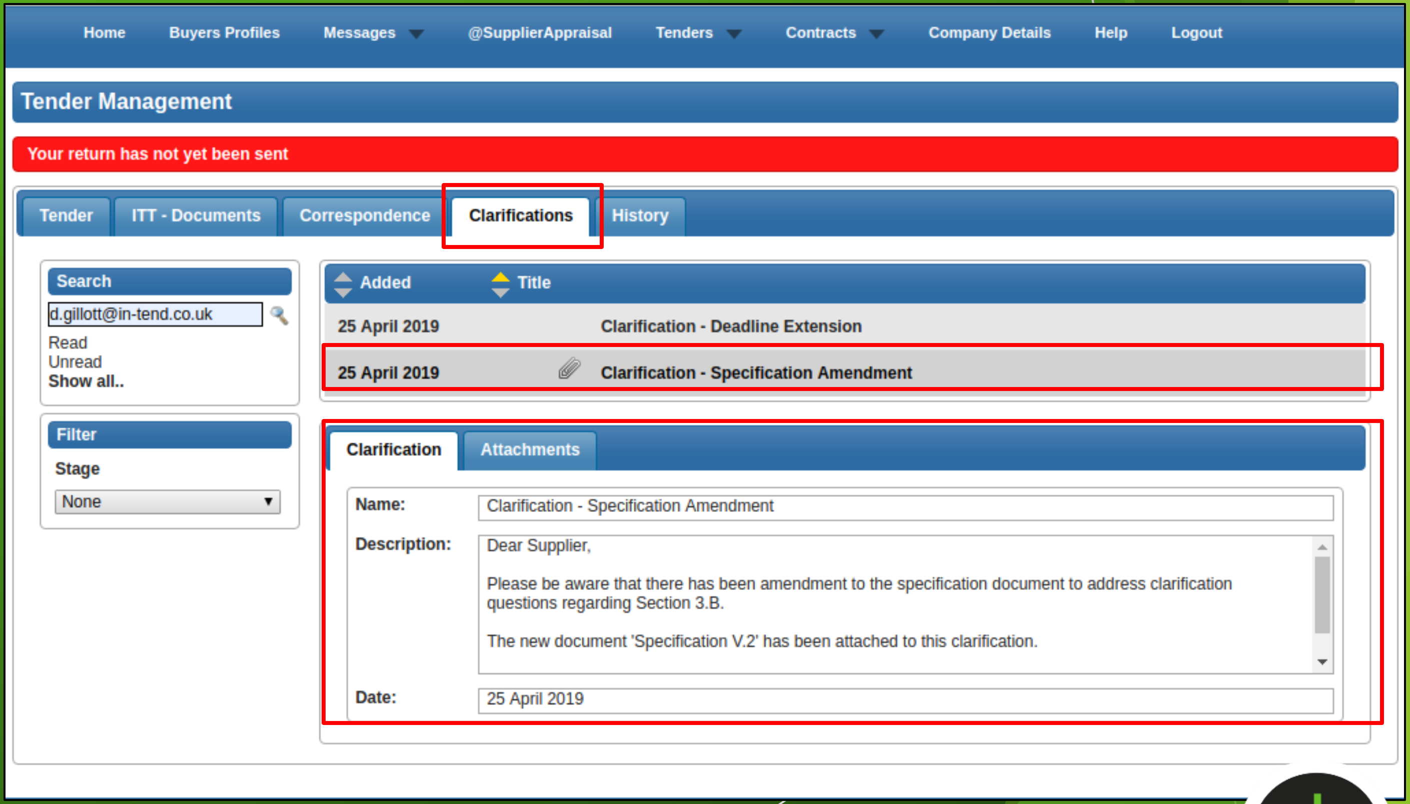
Tender Clarifications

Clarifications Tab

The clarifications tab will give access to all clarifications issued for this tender. Select the required clarification to view the information. A paper clip icon indicates a file attachment which can be accessed through the 'Attachments Tab'.

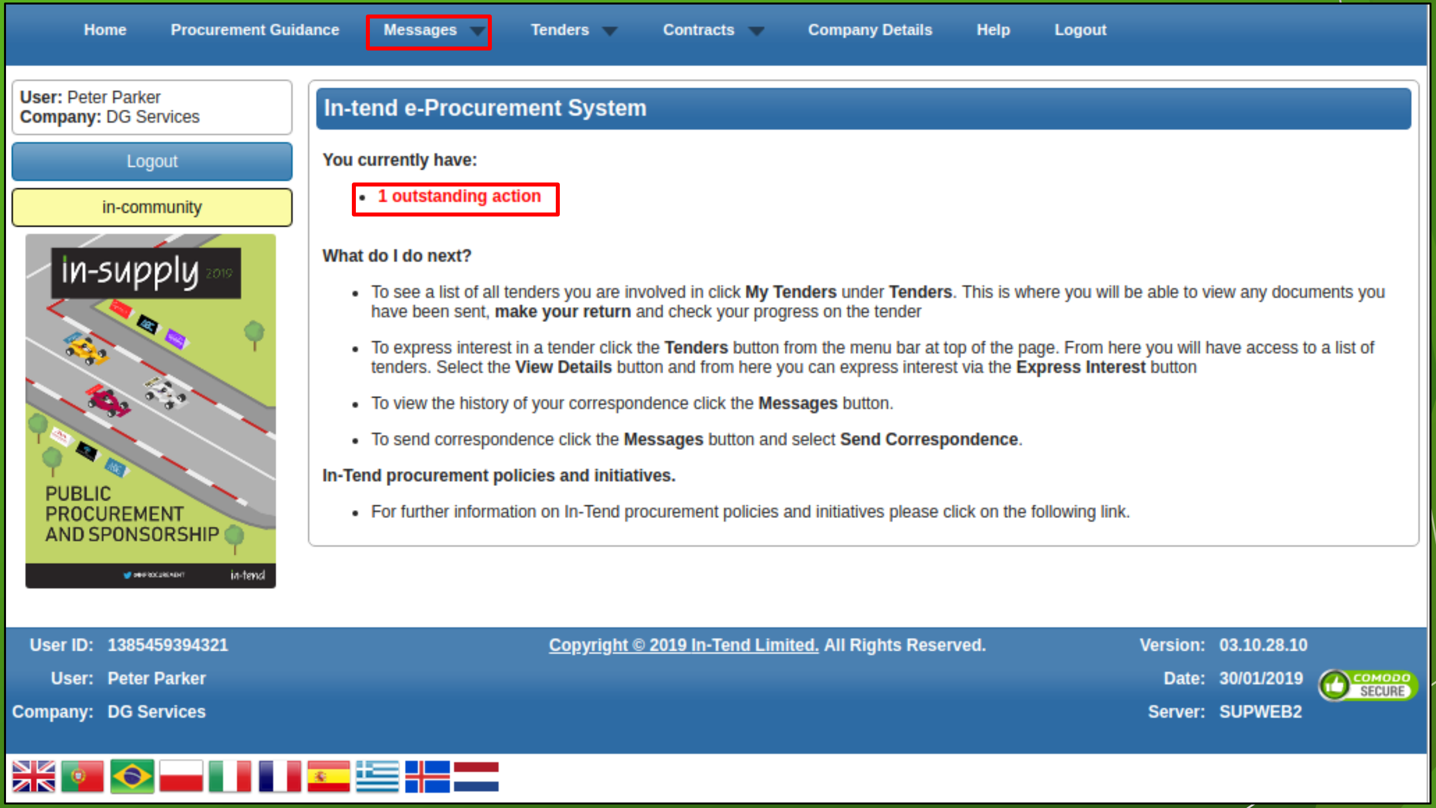
Please Note: *The clarification area of the portal is a one way messaging tool for the buyer.*

Any questions relating to the content of a clarification should be made using the correspondence function.



Actions

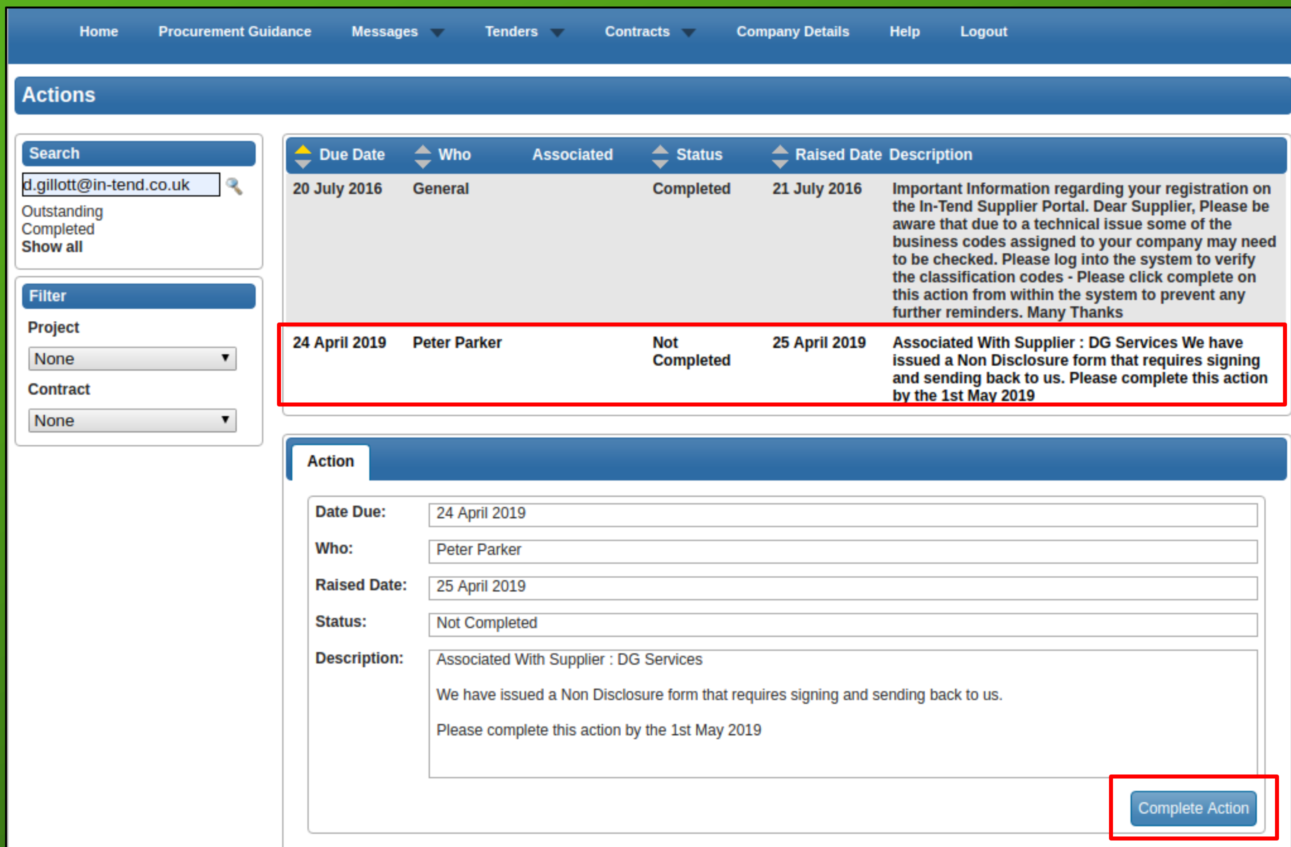
Actions are used to send you tasks which should be completed by a certain date. The system will send out automatic reminders for you to complete Actions.



If you receive an Action email, log in to your homepage and a red link will appear on screen. Click on the red link or hover over '**Messages'** at the top menu bar and then click Actions.

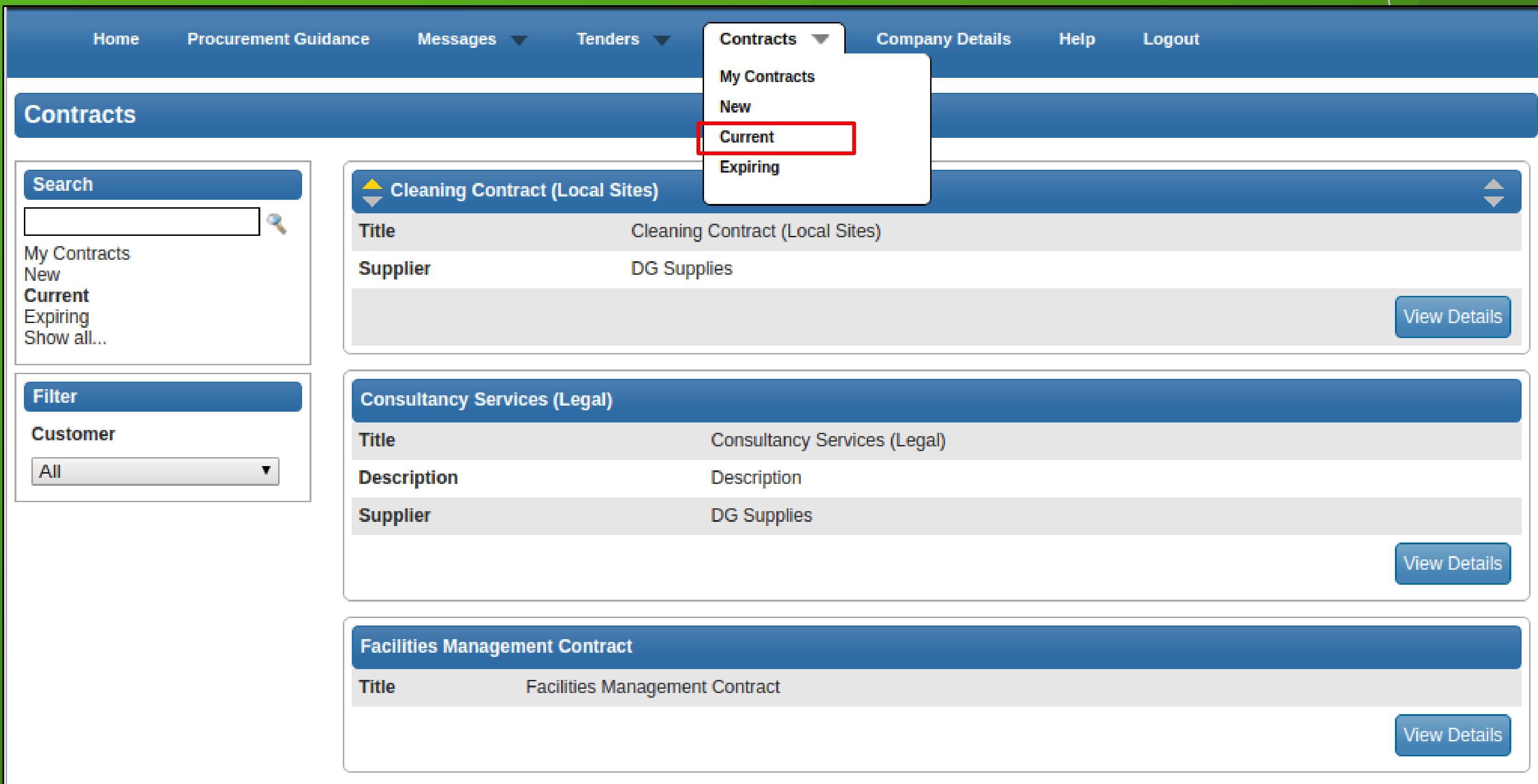
Actions

Review any required actions and click the 'Complete Action' button to notify the buying authority when the task is complete. Completing the action will cancel any reminder notifications.



Contracts – Public View

You can view a summary of what the Contracting Authority has published from the **Current Contracts** link from the top menu bar *(Please note: This may not be available with some institutions)*.

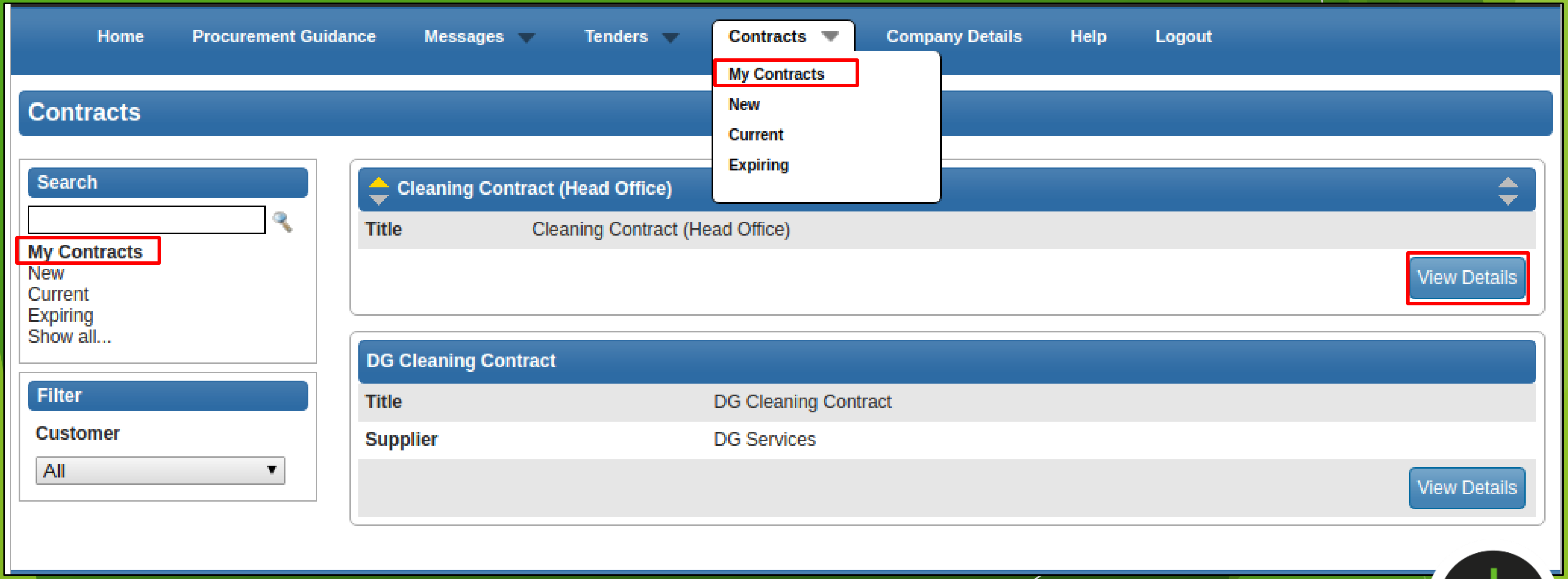


Contracts – My Contracts

If you are the contracted supplier you should log into the secure area of the website to be able to view any contract records assigned to your company.

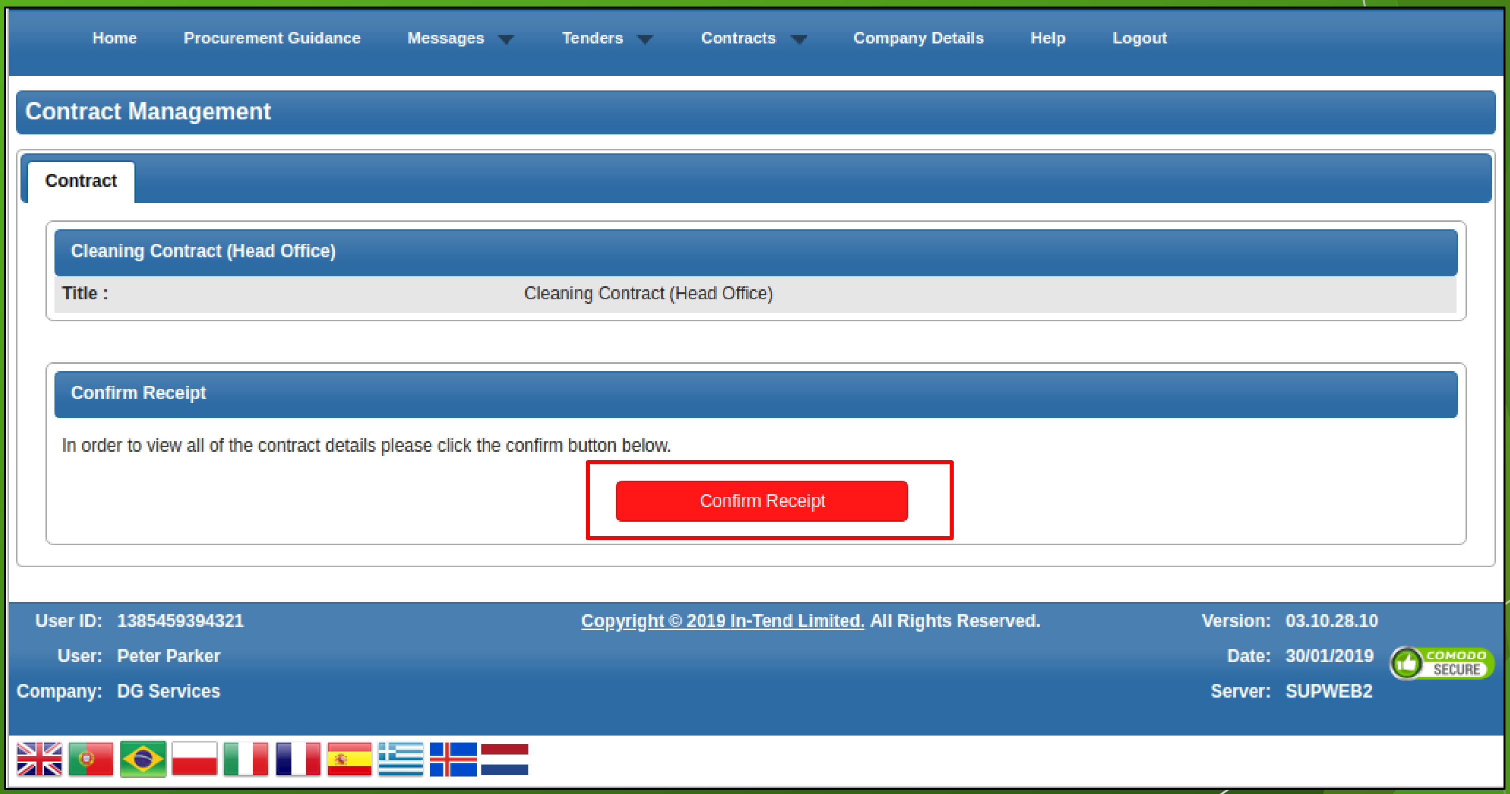
You can view this information by hovering over **Contracts** on the top menu bar and then clicking on '**My Contracts**' and then **View Details** for the relevant contract.

From this screen you can view contract details, see contract documents and send correspondence relating to the contract.



Contracts – Confirmation

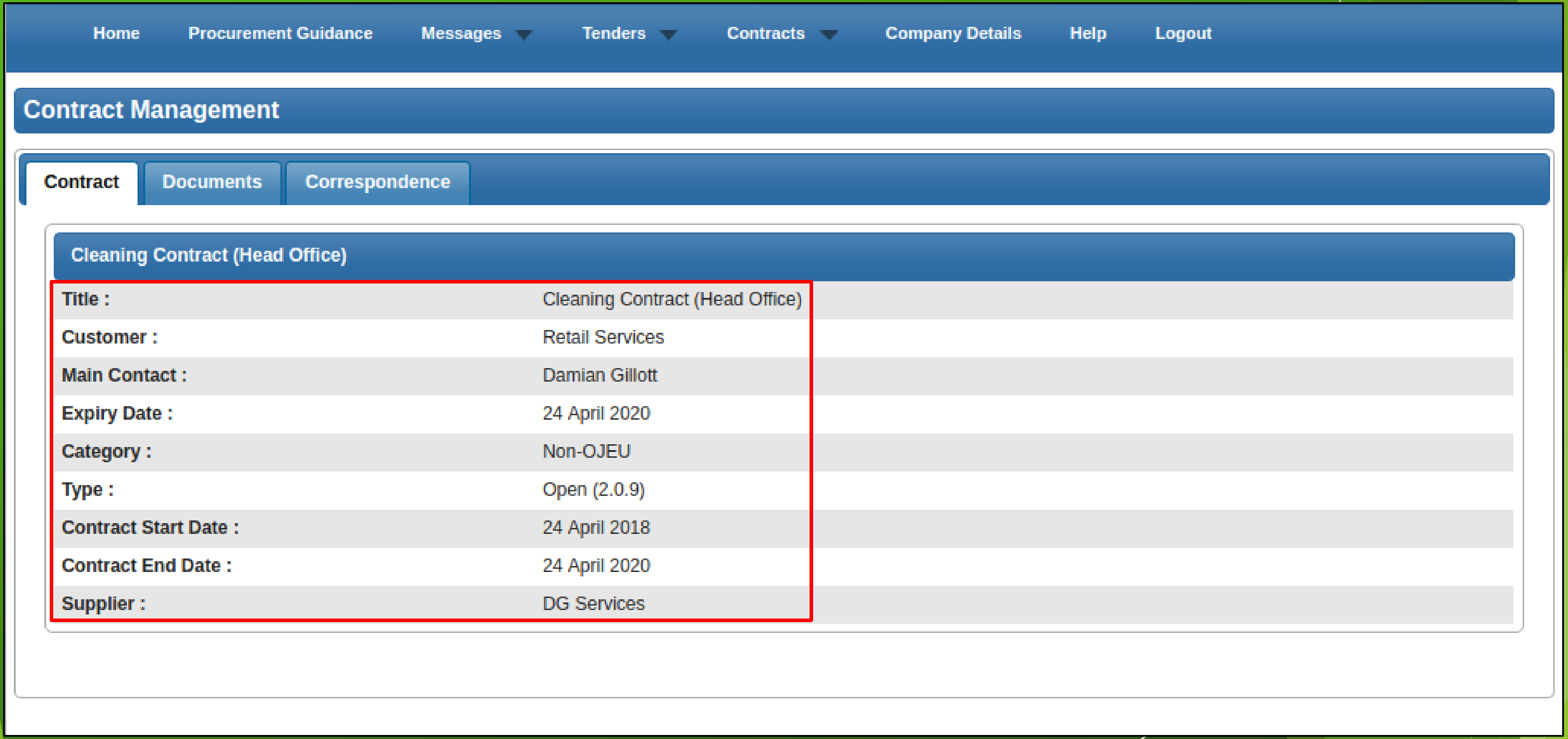
If you are accessing the contract record for the first time then you *may be required to confirm receipt before gaining access to the contract details.



** Confirmation is subject settings and may not be required for all contract records.*

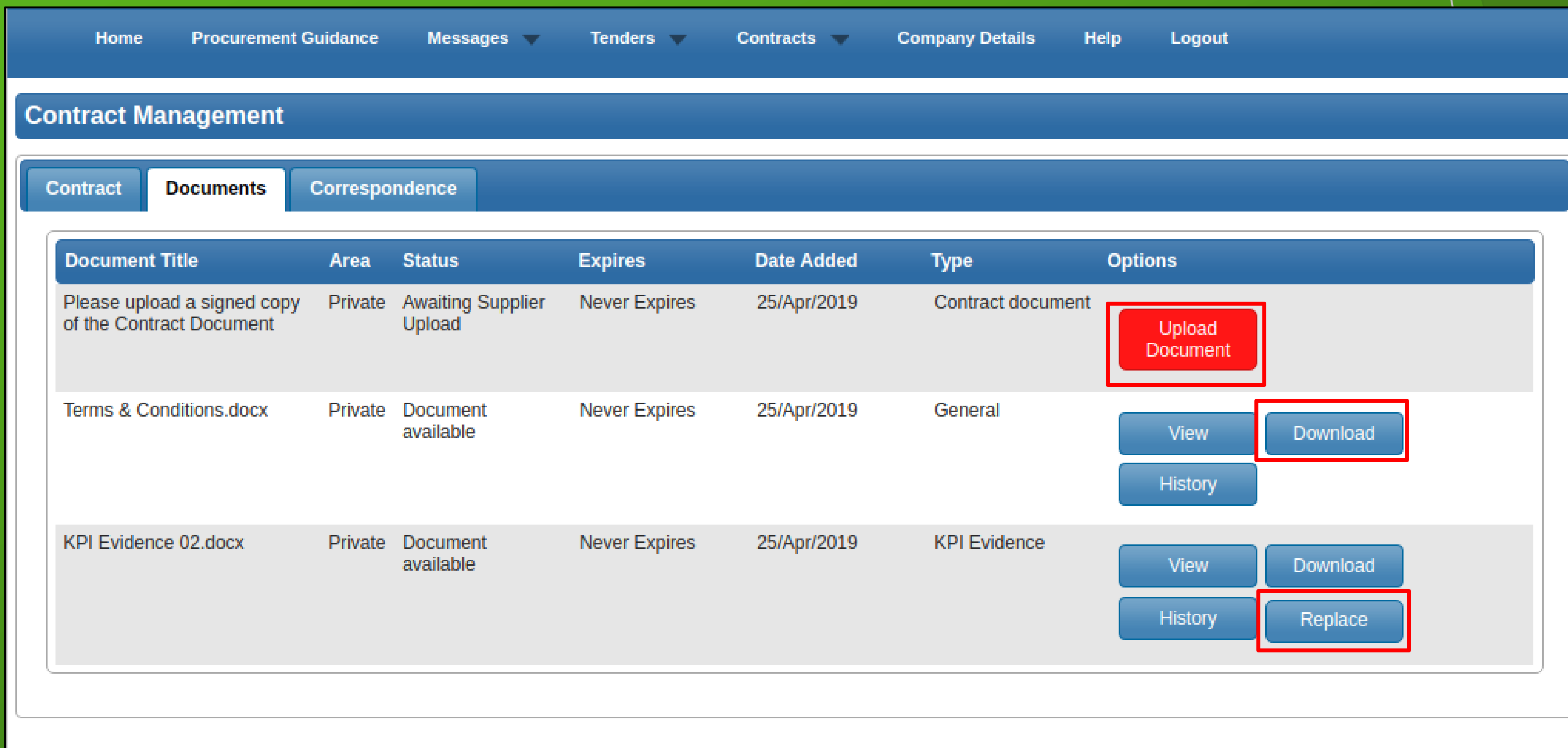
Contracts – Details

When viewing the details a contract record you will be taken into the ‘Contract Management’ area for the selected contract record.



Contracts – Documents

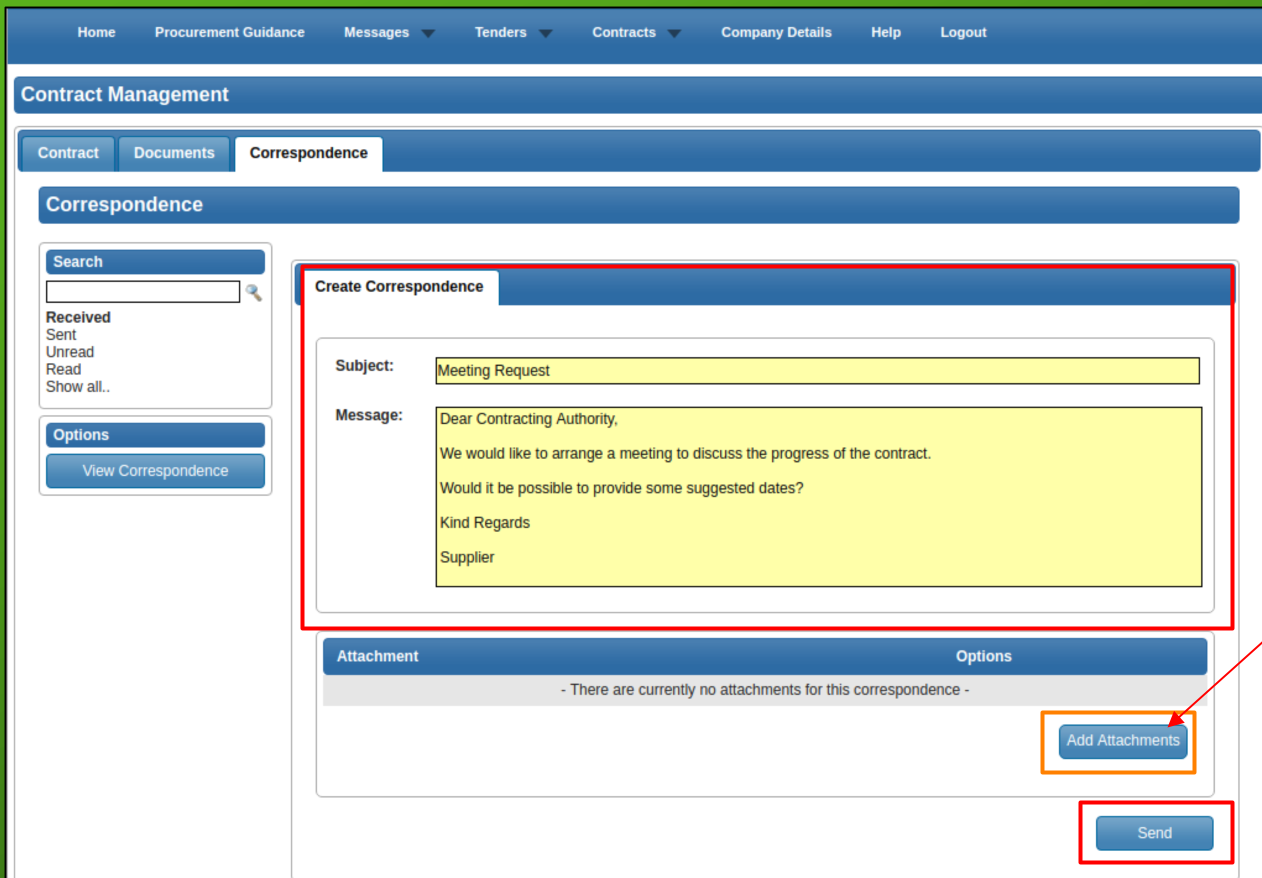
The ‘Documents’ tab will give access to any Contract documentation. This area is specific to this individual contract record and can be populated by yourself and the Contracting Authority.



If the Contracting Authority have made a request for a specific document then a specific upload button may be available in this screen. Subject to settings, documents in this screen may be accessible for Viewing, Downloading or Replacing.

Contract – Correspondence

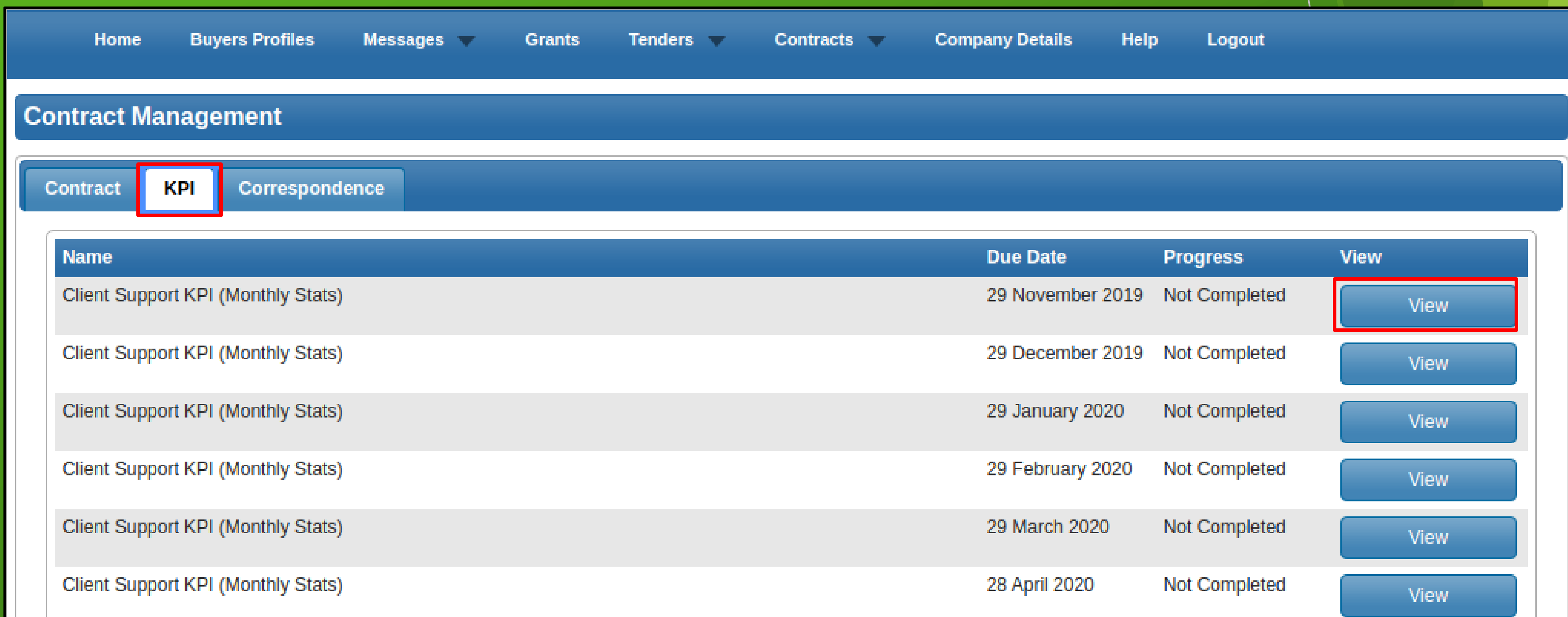
The 'Correspondence' tab will give access to any correspondence between you and the Contracting Authority. From here you can create contract specific messages or view correspondence from the Contracting Authority.



If required, file attachments can be included within the correspondence message.

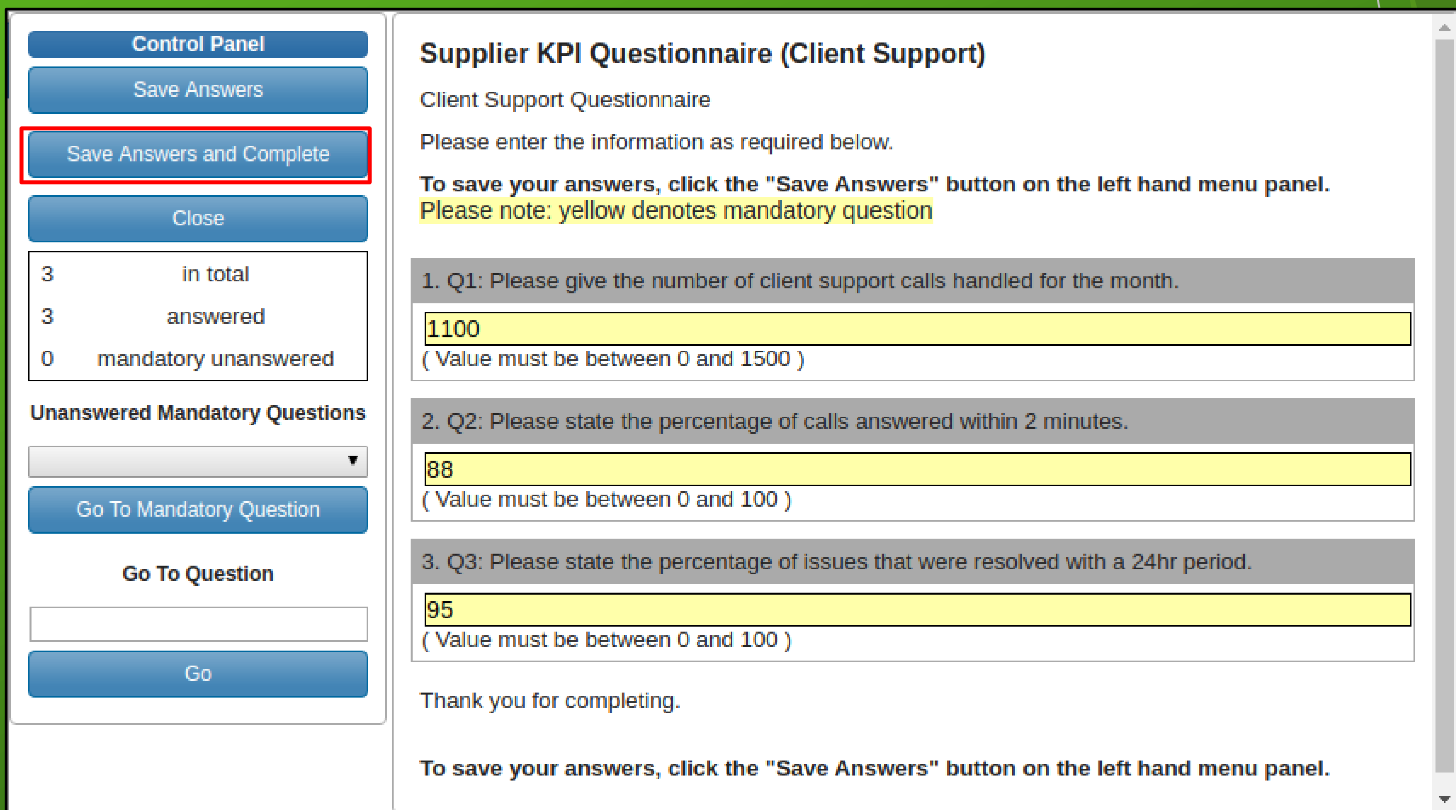
Contract – 360 KPI's

KPI questionnaires maybe scheduled for completion within the Contract Record. Subject to the 'Due Date' the Questionnaire can be accessed and completed using the 'View' button for the required KPI.



Contract – 360 KPI's

Questionnaires can completed as required. Use the '**Save Answers**' button to save your answers for completion at a later date. The '**Save Answers and Complete**' should be used to set the questionnaire as 'Completed' in line with the specified '**Due Date**'.



Support

Help & Support (Technical)

Please refer to the 'Help' section of the portal