

REGISTERING TO PROACTIS

To avoid duplication of Supplier Accounts, please check that your organisation has not previously registered for an account.

If you do not already have a Proactis account, please complete the registration process first.

Register using <https://supplierlive.proactisp2p.com/Account/Login>.

The system will pre-qualify your registration and you can specify areas of interest and search for opportunities.

1. Sign up screen

Click 'Register' in the SignUp? Panel.

The screenshot displays the Proactis Supplier Network registration interface. At the top, the Proactis logo is centered, and a language dropdown menu is set to 'English (United Kingdom)'. The main content area is divided into two panels: 'Supplier Network' and 'Sign Up?'. The 'Supplier Network' panel contains input fields for 'Username (usually your email address)' and 'Password', with a 'Sign In' button circled in orange. Below these fields are links for 'Haven't got a Username?' and 'Cannot access your account?'. The 'Sign Up?' panel features a 'Register' link, a 'Have you been invited?' section with an 'Access Code' field and a 'Go' button circled in orange. On the right side, a vertical sidebar contains two buttons: 'Tenders Direct' (orange) and 'Opportunities' (dark blue with a magnifying glass icon).

2. Complete the Self Registration questions

When completing the Organisation Name please ensure this is the full company name. If known or registered as a company that is trading as then please present in the following format - Organisation A T/A Organisation B

Self Registration

Register on our Supplier Network

Please follow these simple steps to register

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

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

Sign in Details	
Email Address *	Repeat Email Address *
<input type="text"/>	<input type="text"/>

Organisation Details	
Organisation Name *	Property Name/Number *
<input type="text"/>	<input type="text"/>
Address 1 *	Address 2
<input type="text"/>	<input type="text"/>
Town *	County
<input type="text"/>	<input type="text"/>

3. Click on the 'Activation Link' in your email, this will take you to the Proactis supplier portal.

Dear Lydia,

Your recent request to join the Proactis Supplier Network has been approved. Please use the activation link below to navigate to the Supplier Network website, where you will be asked to complete the registration process.

Organisation Name: Lydia123
Primary Contact Name: Lydia Epetuku
Username: lydia.epetuku@shaw-trust.org.uk
Supplier Network website URL: <https://SupplierLive.ProactisP2P.com/>

[Click here to activate your account](#)

We trust this is satisfactory, but should you have any further queries regarding this request then please contact our Supplier Support Team via email at suppliersupport@proactis.com.

Please note, this email has been sent from an unmonitored address.
Email ID: a1b6f736-3080-eb11-80e9-005056b60189

Once you have clicked on the link to activate your account you will be directed to the Self Registration screen to commence with the 'Self Registration' process.

Please note: All fields marked with a red * are mandatory and must be completed.

4. Complete the self-registration information panels:

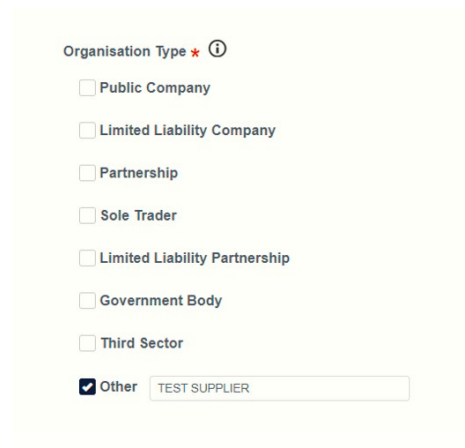
Organisation Details

Check all the details are correct, add in Registration Number (Company Reg Number), VAT Number and DUNS Number, if applicable. If not applicable, check the Not Applicable box.

Registration Number ⓘ	<input type="text"/>	<input checked="" type="checkbox"/> Not Applicable
VAT Number ⓘ	<input type="text"/>	<input checked="" type="checkbox"/> Not Applicable
DUNS Number ⓘ	<input type="text"/>	<input checked="" type="checkbox"/> Not Applicable

For further information on how to obtain a DUNS number visit: www.dnb.com/duns-number

Next complete the Organisation Type check box. Select the most appropriate option.



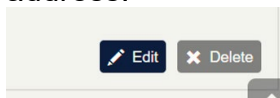
The screenshot shows a form titled "Organisation Type" with a red asterisk and an information icon. It contains several checkboxes for different business types: Public Company, Limited Liability Company, Partnership, Sole Trader, Limited Liability Partnership, Government Body, and Third Sector. The "Other" checkbox is selected, and a text input field next to it contains the value "TEST SUPPLIER".

Once completed, move on to

Address and Users

Your initial business address will be prepopulated however you can add multiple addresses by clicking the Add Address Icon. Additional users can be added via the 'Add User' where you will be presented with a dialogue box to complete the necessary information. Each user created will receive an activation email to confirm/amend any details before being able to login and use the system. Please note: You can add an unlimited number of users to your account.

- If you need to edit or delete, scroll to the bottom right of the screen and click edit to amend details or delete to remove the address.

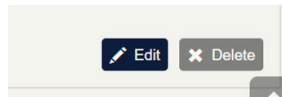


- Scroll to the Top left of the screen to add an address.

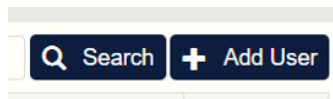


- Scroll down to Organisation Users, check the user details are correct.

If you need to edit or delete, scroll to the bottom right of the screen and click edit to amend details or delete to remove the user.



- Scroll to the Top left of the screen to add a user.



Once completed, move on to

Product Classifications

What you sell – Here you will need to enter information on the products/services you are able to provide by using Common Procurement Vocabulary (CPV) Codes. In order to add your code, you can either enter a key word into the search option or you can select from the list available.

- Read the information panels for Product Classifications.
- From the available list select the desired classification e.g., 4500000 Construction Work, please note it will also filter down further codes that may be applicable click to select all relevant codes. You will then need to click on the orange arrow indicated below this will add your codes to the right-hand side of the screen.



The top icon shown here.

This will move your choices from the left 'Available' panel to the right 'Added' panel.

Select the codes again and a tick will appear in the box which is now highlighted in blue and your codes have been added.

The screenshot displays a web interface for managing CPV (Common Procurement Vocabulary) codes. It is divided into two main sections: 'Available' and 'Added'.

Available Section: This section contains a list of CPV codes with their corresponding descriptions. Each item has a checkbox to its left. The codes listed are:

- 63000000 : Agricultural farming fishing forestry and related products
- 09000000 : Petroleum products fuel electricity and other sources of energy
- 14000000 : Mining basic metals and related products
- 15000000 : Food beverages tobacco and related products
- 16000000 : Agricultural machinery
- 18000000 : Clothing footwear luggage articles and accessories
- 19000000 : Leather and textile fabrics plastic and rubber materials
- 22000000 : Printed matter and related products
- 24000000 : Chemical products
- 30000000 : Office and computing machinery equipment and supplies except furniture and software packages
- 31000000 : Electrical machinery apparatus equipment and consumables; Lighting
- 32000000 : Radio television communication telecommunication and related equipment
- 33000000 : Medical equipments pharmaceuticals and personal care products
- 34000000 : Transport equipment and auxiliary products to transportation
- 35000000 : Security fire-fighting police and defence equipment
- 37000000 : Musical instruments sport goods games toys handicraft art materials and accessories
- 38000000 : Laboratory optical and precision equipments (excl. glasses)

Added Section: This section shows the CPV codes that have been added to the user's profile. It contains three items, each with a checked checkbox:

- 80000000 : Education and training services
- 85000000 : Health and social work services
- 90000000 : Other community social and personal services

Between the two sections, there are three circular icons: a right arrow, a left arrow, and a refresh/circular arrow icon. At the bottom right of the 'Added' section, there is an upward-pointing arrow icon.

Please note: Suppliers will be sourced for contract opportunities by Procurement Officers using specific CPV (Common Procurement Vocabulary) Codes. It is essential that only CPV Codes specific to your organisation are added to your profile

Once completed, move on to

Notification Subscriptions

This is where you can indicate the notifications via email you would like to receive. We advise all are selected to ensure you receive all relevant email notifications this can be done by clicking the select / unselect all options here. Ongoing changes can be made via the 'Manage Preference' option from the dropdown menu.

Note – there is an option to Select/Unselect all options by checking the box at the top on panel.

☐ **Select/Unselect all options here.**

By checking all options, you may receive emails regarding items which are not relevant to your organisation.
By not checking any options you may not be made aware of items which are of relevance to your organisation and could miss out on opportunities.

Check all panels are completed, as shown here

 Complete

Once all information has been completed, please click on Finish, you will be taken to the Welcome to the Supplier Network screen.

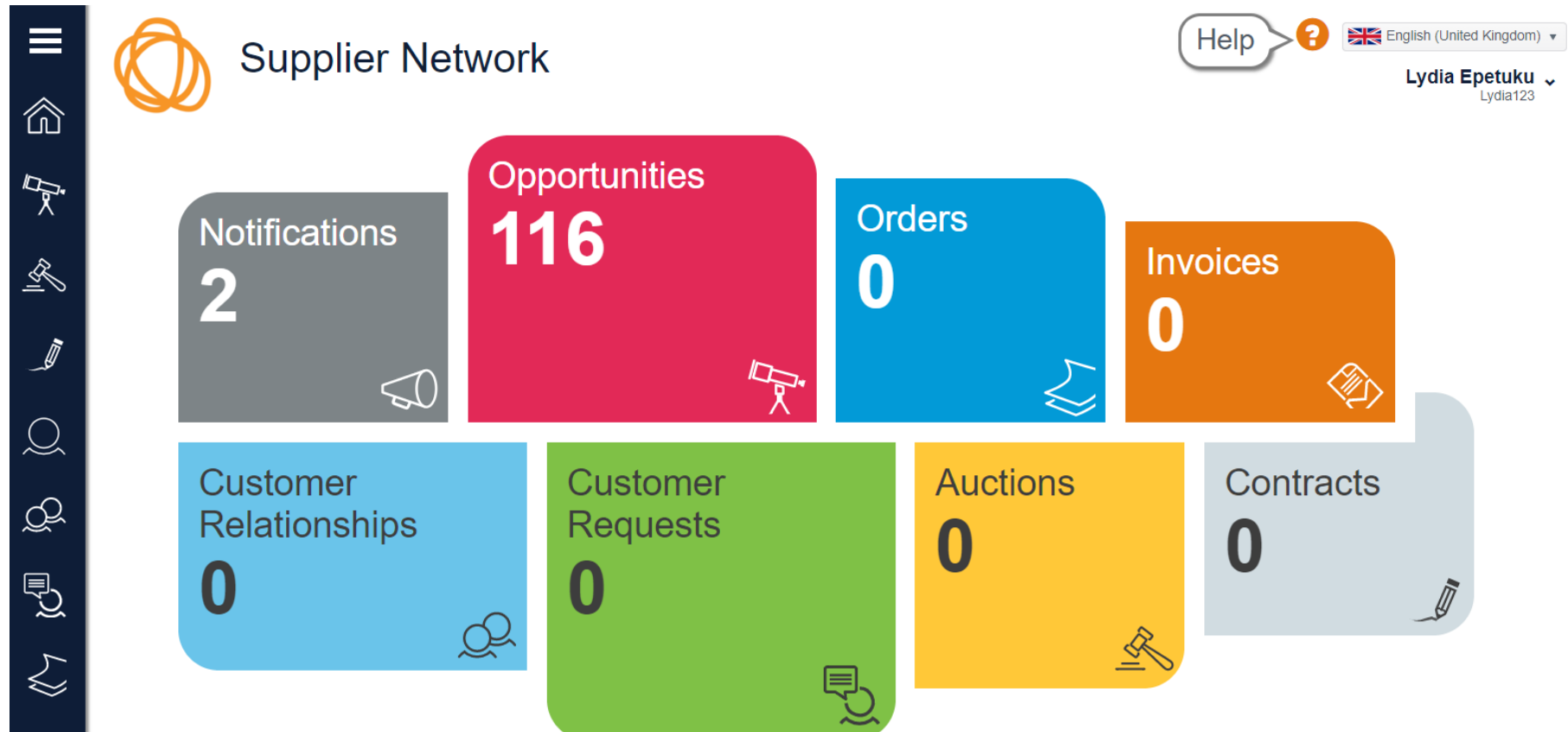
Create a password in the New Password box.
Repeat the password in the Repeat Password box.

Terms & Conditions - Read the terms and conditions of the use of this Supplier Portal and tick the box to denote you have read and understood the terms and that you agree to abide by them. If you do not agree you cannot complete the registration process.

Once all information has been completed, please click on Finish.

Supplier Dashboard

The Supplier Network dashboard will appear when you log in.



Opportunities

You can search for the opportunity by a number of ways within the search box. You can enter the reference number, Description of the contract or enter Shaw Trust to view all opportunities. When search is clicked it will then provide the results of the search in the list below.

Your Opportunities

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

Search
 Filters

Reference	Customer Name	Title	Type	Closing Date	Time Remaining	Show Me
RFX1000024	Shaw Trust	Local Health Network - Specialist Conditions	Private	18/03/2021 16:00	6 days 22 hours	
RFX1000004	Shaw Trust	The Shaw Trust DPDPS	Advertised	06/05/2026 00:00	More than a year	

English (United Kingdom)

Lydia Epetuku

 Lydia123

Shaw Trust DP-DPS Opportunity

To join the Shaw Trust DPDPS:

- Click on the **Show Me** icon on The Shaw Trust DP-DPS row
- Register Interest

Document title: Shaw Trust DP-DPS Registration

Document Owner: Commercial Support

Version: FINAL 10/08/2022 v2

Click 'New Response'

Your Opportunities

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

Search
 Filters

Reference	Customer Name	Title	Type	Closing Date	Time Remaining	Show Me
RFX1000024	Shaw Trust	Local Health Network - Specialist Conditions	Private	18/03/2021 16:00	6 days 22 hours	
RFX1000004	Shaw Trust	The Shaw Trust DPDPs	Private	06/05/2026 00:00	More than a year	

Opportunity | RFX1000004

+ New Response

Working through the tabs, you will be required to read or complete information before submitting your response.

General Tab

- Open the Request Documents and download and read any documents attached.
- Complete the About You panel – provide information about your Company, what types of services you can offer and why you would like to work with Shaw Trust.
- Request Overview – Review all the details regarding the Opportunity.

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Lots Tab

- Check the Opt in options for all Lots you are submitting a response for. Click to add/remove the tick from any of the Lot rows. You will be submitting a response to all rows which have been ticked on this tab.



Your Response | RSP1001788

✕ Decline

Messages

Validate

Save Draft

Submit

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

<

General

Lots

Questions

Attachments

>

LOT 1 Community, Health and Wellbeing	Opt-in? <input checked="" type="checkbox"/>
LOT 2 Learning and Skills	Opt-in? <input checked="" type="checkbox"/>
LOT 3 Employability	Opt-in? <input checked="" type="checkbox"/>
LOT 4 Justice and Rehabilitative Services	Opt-in? <input checked="" type="checkbox"/>
LOT 5 Children and Young People Services	Opt-in? <input checked="" type="checkbox"/>

?

English (United Kingdom) ▾

Lydia Epetuku ▾

Lydia123

Questions Tab

- Work through the questions.
- Click or touch the headings to expand each section. You must fill in all questions with a * next to them

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General

Lots

Questions

Attachments

Please complete the following questionnaire from Shaw Trust. Your answers will be automatically saved every five minutes. You can also hit the Save button at any time if you want to stop and finish off later.

Click or touch the headings to expand each section. You must fill in all questions with a ★ next to them.

1 : Introduction (4 questions)

2 : Organisational Details (8 questions)

3 : Validation Details (9 questions)

4 : Organisational overview (4 questions)

5 : Group Information (4 questions)

6 : Financial (5 questions)

7 : Quality (13 questions)

8 : Organisational Policies and Procedures (14 questions)

9 : LOT 1 - Community, Health and Wellbeing Experience (86 questions)

10 : LOT 2 - Learning and Skills (77 questions)

11 : LOT 3 - Employability (86 questions)

12 : LOT 4 – Justice and Rehabilitative Services (83 questions)

13 : LOT 5 - Children and Young People Services (94 questions)

14 : Declaration (2 questions)

- Your answers will automatically be saved every five minutes. You can also click the Save Draft button, at the top of the screen at any time if you need to stop and return to complete later.



Attachments Tab

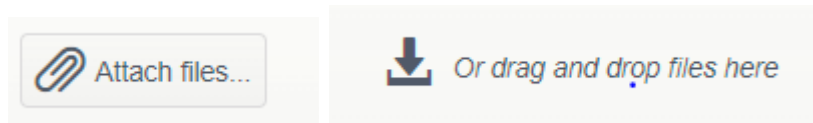
- Attach any required documentation.
- Select the type of document from the drop-down list.

Your Files

Attachment Type

Select a type...

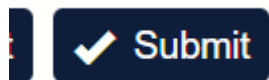
- Once a document type has been selected then the Attach files button and the 'or drag and drop files here' options are opened.



- Attach documentation using one of the above options.
- Uploaded files will show in the Uploaded files panel.

Uploaded Files			
Name	Type	Download	Remove
<div> <div> <div></div> <div></div> <div>0</div> <div></div> <div></div> </div> <div>No items to display</div> </div>			

Once you have completed all the tabs then Submit your response by clicking the Submit button at the top of the screen.



Once submitted, your response will be reviewed and you will receive a notification once you have been added to the Shaw Trust DP-DPS. Suppliers on the Shaw Trust DP-DPS will be invited to respond to call off opportunities relevant to the Lot/s they have opted into on the Lots tab.

Other Shaw Trust Opportunities

To review other opportunities offered by Shaw Trust you can search for the opportunity by a number of ways within the search box. You can enter the reference number, Description of the contract or enter Shaw Trust to view all opportunities. When search is clicked it will then provide the results of the search in the list below.

Your Opportunities

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

shaw trust

Search
 Filters

Reference	Customer Name	Title	Type	Closing Date	Time Remaining	Show Me
RFX1000024	Shaw Trust	Local Health Network - Specialist Conditions	Private	18/03/2021 16:00	6 days 22 hours	
RFX1000004	Shaw Trust	The Shaw Trust DPDPS	Advertised	06/05/2026 00:00	More than a year	

English (United Kingdom)

Lydia Epetuku

 Lydia123

Click on the Show Me icon for the Opportunity row you are interested in.

The Opportunity will open and you can review the Opportunity, similar to the DP-DPS process. You will need to read and respond to all tabs to take part.

Document title: Shaw Trust DP-DPS Registration

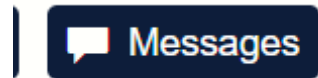
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Messages

Proactis sends correspondence via the messages function.

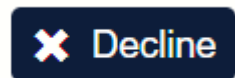
To create, review or respond to a message click on the Message button at the top of the screen.



Declining an Opportunity

If you decide you would not like to respond to the Opportunity, then you can decline the Opportunity.

At the top of the screen, you will see a decline button, click if you wish to decline the Opportunity. You will no longer receive communication regarding the Opportunity as it progresses.



Further help and support

If you are unsure or have any questions then check the help section at the top right of the screen.



Or contact the Shaw Trust Commercial Support Team: contracts@shaw-trust.org.uk

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