

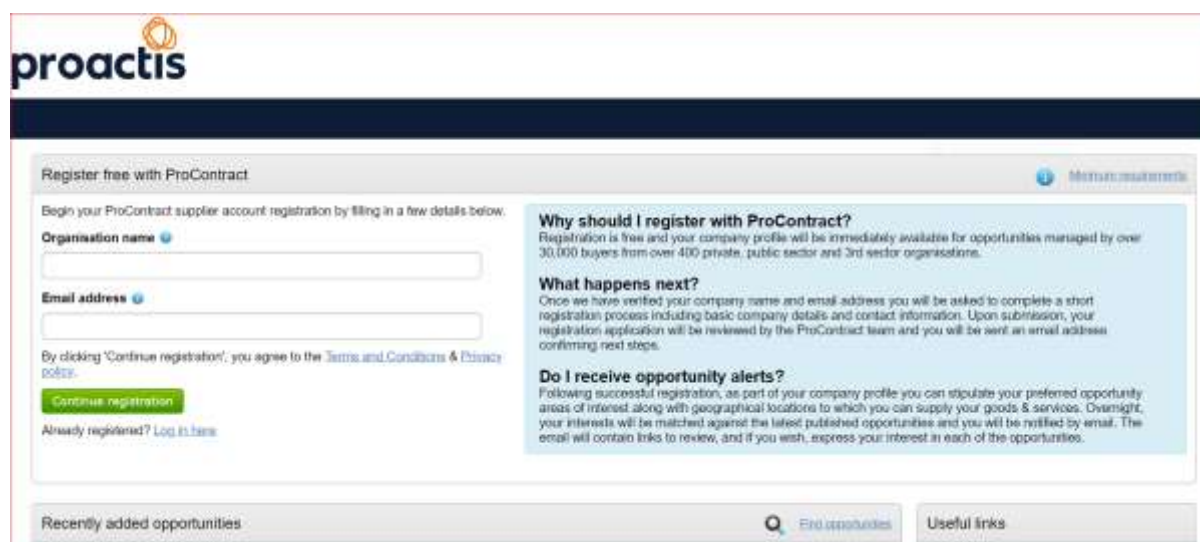
Grants - supplier guide to registering on the e-tendering portal (ProContract) with the Met Office

Registering on the ProContract portal

Suppliers who want to take part in **any** call opportunity for Met Office grant funded work or so want to be able to express an interest **must register** on **ProContract** with details of themselves and the organisation that they work for. This process is covered, in detail, in the following section, with explanations of all the key sections and actions required.

Click the Register Free link to begin the registration process – this can be found on the opportunities **portal home page** where there is an option to “Register Free” (the link is in the top right-hand corner of the screen, highlighted below).

You will be required to enter your details and your organisation’s details; this process is covered in full by the user guide.



The screenshot shows the 'Register free with ProContract' page. It features a registration form with fields for 'Organisation name' and 'Email address'. A green 'Continue registration' button is visible. To the right, there is a blue box with text explaining why to register, what happens next, and how to receive opportunity alerts. At the bottom, there are links for 'Recently added opportunities', 'Find opportunities', and 'Useful links'.

Supplier registration introduction

This page is an introduction to the process that you will be taken through in order to complete your registration onto the portal. Please read this text carefully before proceeding. If you wish to continue, click “Next” from the options at the bottom of the page, or if you want to abort the registration process click “Cancel”

Contact information & security section (step 1 of 5)

At this stage of the registration process you need to enter your own contact details and a security question and answer in the “Contact Information & Security” section. You will be the primary account holder for this organisation (although details can be changed post registration). This primary account will be able to modify the details for the organisation and add further accounts, which is detailed in another section of the guide.

E-mail - This is the e-mail address where messages will be sent to confirming registration details, and all other system communication that may take place in the tender process. It is strongly recommended in most instances that a **generic or shared email address** be used, so that communication will not be lost if an individual is away or leaves their position. Also, this must be of standard email format e.g., bidteam@university.ac.uk

Security information - This is where you are asked to specify a security question and answer of your choice, which will be held with this account. It must be something that is secure and also that is memorable.

When the details are complete click on the “Next” button to proceed at the bottom of the page, or the “Cancel” button to cancel registration.

Your organisation details (step 2 of 5)

In this step you will need to populate details regarding the organisation you work for/are registering on behalf of.

Organisation information - In the first section of organisation information you are required to enter the name of the organisation you work for and also details of the location.

Should any of the mandatory fields not apply, such as “Postcode” for companies based outside of the United Kingdom, enter “N/A” in order to proceed.

Note: Some of the fields (County and Country) are chosen using a dropdown menu. To select a County click the arrow to the right of the box to reveal a drop-down menu containing all the options. From the list select the required county by clicking on its name and this will populate the field as required. The country is chosen in exactly the same way, although note that the default selection is the United Kingdom.

The next three fields are all optional, but if possible, they should be filled out as the more information that can be initially provided, the better it is for the contracting organisation. Your organisation may not have details for all these sections, in which case just leave them blank. Typically, these fields will be Organisation Registration Number, VAT Registration Number and Website.

Organisation description - The next section asks for an Organisation Description. Here more information on the supplier is entered to help the contracting body understand what it is your organisation does.

Note: A description and at least one keyword are required in this section. This is important as the procuring organisations can search for an organisation based on the description or keywords specified.

This is a free text box and as much information as is required can be entered here.

Organisation affiliations - The next section is Organisation Affiliations. This is a section that gives organisations a chance to show that they have certain affiliations or memberships with organisations that are of interest to the procuring organisation. For some portals there will be no affiliates listed in the drop-down list, and for others there will be a varying list here, as this list is defined per portal.

Here you can select the affiliate that is recognised by the contracting organisation as the drop down is populated by the supplier and the associated membership or reference number is included to prove this.

Note: If you do not have any of the Affiliate IDs that are in the drop-down options leave the drop-down lists as “Please Select”.

Organisation classification - The final selection is Organisation Classification section, although the list can change depending what the procuring organisation(s) have chosen to ask for. This is a mandatory section which **must** be populated.

This is the section where the supplier can indicate the classifications that the organisation belongs to. This will help the contracting body as there are occasions when an organisation must contract a certain amount of work to organisations with certain classifications. 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.

Once satisfied with this section move onto Step 3 by clicking “Next” from the options at the bottom of the screen. To go back to the previous page of the wizard click “Previous”.

Category selection (step 3 of 5)

This is the category selection step of the supplier registration. To select your chosen categories click the ‘Search / Select Categories’ button.

Contract Category Interest - This section is where you can register your organisation to receive automatic e-mail notifications of new opportunities that have been published that may be of interest to your organisation. This will greatly assist you when using the portal and will mean that relevant opportunities are not missed. If nothing is selected, then no e-mail notifications will be sent. The category will differ per portal, depending on what classification is being used, e.g. UNSPSC, CPV, and ProClass etc.

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 organisation against lower-level classifications, you may use the search facility at the top of the page to search specific words to help you narrow down the categories you require to add to your account. Categories around science and research would be appropriate.

This can also be reached by clicking on the blue code to the left of the category and this will take you down to the next level. This can be repeated for up to four levels in some classifications. An alternative to refine your categories is to click on the blue code to ‘drill down’ to the next level. Continue to do so until you find the required category.

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 any time to carry out required amendments; searches of advertised opportunities for all categories can also be carried out at any time.

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

Selected categories are now shown. Once all categories have been added click “Finish” followed by “Next” to proceed.

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

Additional classifications/categories - 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 selected, 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 organisation against. Tick the options that are applicable from this list; this may be done for several lists.

Organisation selection (step 4 of 5)

This step is the organisation selection page, which will appear as below. This is where the area/organisation that you want to receive automatic e-mail updates from can be found. This works in conjunction with the categories that were selected on the previous page. This allows you to make sure that you receive updates only from the relevant areas/organisations as well as categories.

Note: For some portal registrations there will only be one organisation to select.

By Area: This will select all organisations within the portal from which you will receive new opportunity information.

By Sub Region: This will allow you to select certain geographical sub regions from which to receive new opportunity information. Select Sub Region and then click “Next” from the options at the bottom of the page.

This will list all the available relevant Individual Regions.

By selecting a region this will select all of the organisations within this region from which you will receive new opportunity information. When all the required regions have been selected, as shown below click “Next” from the options at the bottom of the page to move onto the next step.

By organisation: This will allow you to select individual organisations from which you would like to receive new opportunity information. Select “By Organisation” from the drop-down menu and click “Next” to display all available organisations.

They will appear in a list; to select an organisation from which to receive new opportunity information click the box to the left of the organisation name to mark it with a tick.

When all the required organisations have been selected, click “Next” from the options at the bottom of the page to move onto the next step.

Conditions and privacy (step 5 of 5)

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

Here you are asked to agree with Proactis Terms and Conditions and Privacy policy by ticking the boxes placed to the left of the wording.

To view the terms or privacy policy click on the word “view” to the right. To then agree to the conditions then click in the box to mark it with a tick.

Once complete click on the “Next” button to continue with the registration or the “Cancel” button to abort the registration.

Wizard summary - sompletion and editing details

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 uncertain or would like to change any of the information in the sections, then this can be done by clicking on the relevant button in the top right-hand corner of the chosen section.

Note on chosen contract organisations

If you previously chose to select “All” or “by Sub Region” in this section, you will not have been shown a list of the individual organisations that you have actually chosen within these options. On the summary page in the “Chosen Contract Organisations” section you will be able to see all the organisations that you have chosen, to ensure this is correct. Also, any organisations that join the portal from this point will also be added.

Submitting registration

Once you are satisfied that all details are complete and correct the registration needs to be submitted to the procuring organisation.

This is done in the options area at the bottom of the summary page.

If you no longer want to submit this registration, click “Cancel” to abort without anything being saved or submitted.

To submit this registration, click on “Submit Registration” to finalise and send to the procuring organisation for approval.

This will bring up the Supplier Registration Confirmation page.

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



Click "OK" to return to the supplier portal. When the registration is accepted you will receive emails containing your log in details for the opportunity portal.