

Proactis Plaza e-Tendering Supplier User Guide

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



Proactis Plaza e-Tendering Supplier User Guide for Completing the Tender Documents

Note: The Tender Documents MUST be completed on line via this Portal. (Paper submissions will NOT be accepted)

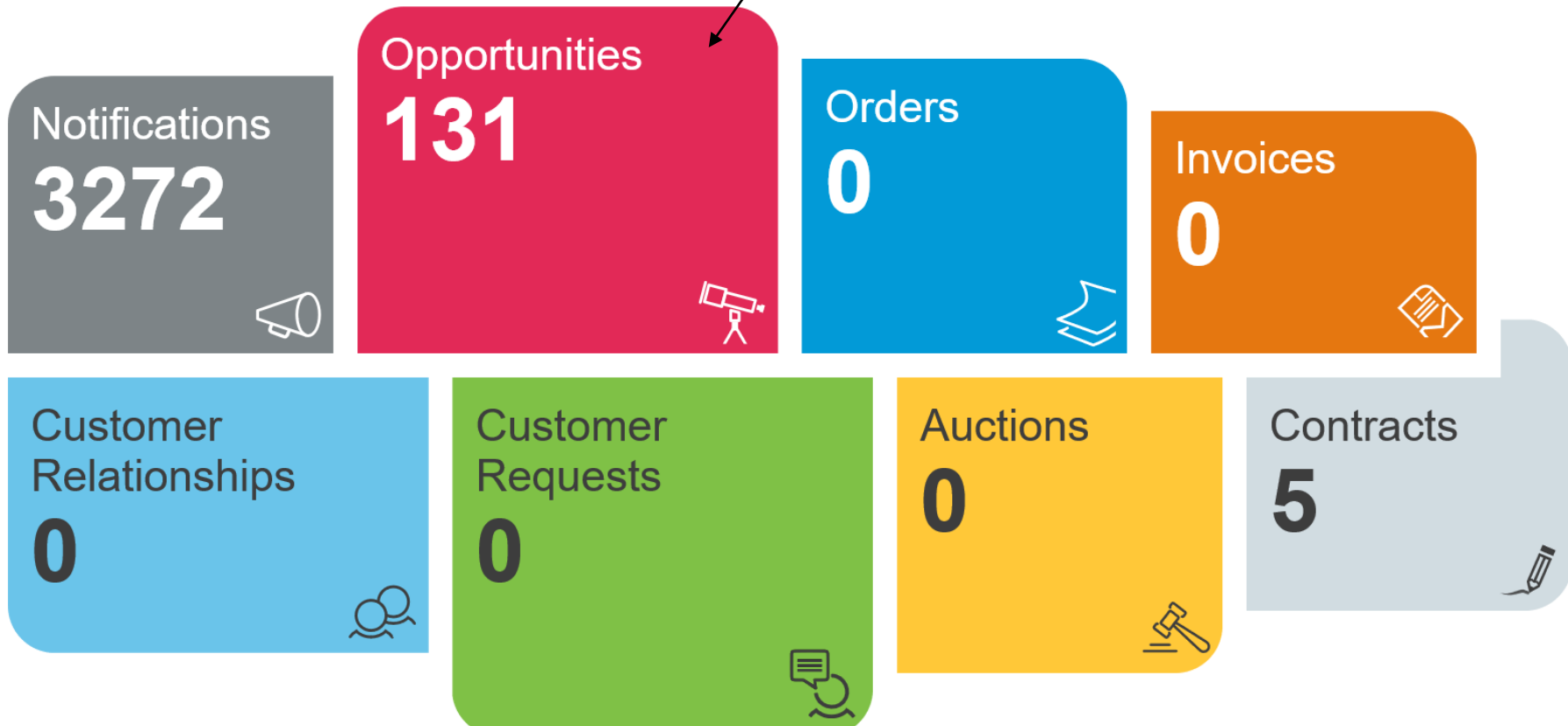
To view all tender opportunities click on opportunities












Supplier Network


Help ? English (United Kingdom) ▾

Jemma Ford ▾
CCBC Procurement Services



You can search for the opportunity by a number of ways within the search box (Highlighted below) You can enter the RQST number, Description of the contract or even by entering Caerphilly County Borough Council. When search is clicked it will then provide the results of the search in the list below.



Your Opportunities

?
English (United Kingdom) ▼
Jemma Ford ▼
CCBC Procurement Services

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

→ Caerphilly County Borough Council

Q Search

v Filters











Reference	Customer Name	Title	Type	Closing Date	Time Remaining	Show Me
RQST13094	Caerphilly County Borough Council	MeUs Leadership Development Programme	Private	20/11/2020 12:00	3 days 20 hours	→
RQST13100	Caerphilly County Borough Council	DPS TRANSPORT MINI COMP SCHEDULE10 2020	Private	23/11/2020 12:00	6 days 20 hours	→
RQST13093	Caerphilly County Borough Council	DPS HOME TO SCHOOL/COLLEGE BUS CONTRACTS 2021	Private	23/11/2020 12:00	6 days 20 hours	→
RQST13091	Caerphilly County Borough Council	Mechanical Works as part of the Refurbishment of The New Link Building and Buildings B9, B10 and B10	Private	24/11/2020 12:00	7 days 20 hours	→
RQST13090	Caerphilly County Borough Council	Electrical Works as part of the Refurbishment of Blocks B9, B10 and B11 at Tir-Y-Birth Depot	Private	24/11/2020 12:00	7 days 20 hours	→
RQST13087	Caerphilly County Borough Council	Supply of Adobe Creative Cloud Licenses	Private	25/11/2020 12:00	8 days 20 hours	→
RQST13095	Caerphilly County Borough Council	TH1157 - Mon & Brecon Canal Relining (Phases 3,4 & 5)	Private	02/12/2020 12:00	15 days 20 hours	→
RQST13099	Caerphilly County Borough Council	SO943 - Parc Penallta Boardwalk	Private	04/12/2020 12:00	17 days 20 hours	→

Once you have found the opportunity you would like to tender for click on show me


Caerphilly County Borough Council

Search

Filters

Reference	Customer Name	Title	Type	Closing Date	Time Remaining	Show Me
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RQST13099	Caerphilly County Borough Council	SO943 - Parc Penallta Boardwalk	Private	04/12/2020 12:00	17 days 20 hours	
RQST12538	Caerphilly County Borough Council	DPS for Grounds Maintenance, Playground and Landscaping Contractors	Private	13/09/2022 00:00	More than a year	
RQST12767	Caerphilly County Borough Council	Dynamic Purchasing System for Printing Services - Ongoing	Private	23/09/2022 11:59	More than a year	

PLEASE NOTE: If you have any problems/queries relating to the tender you can contact the relevant buyer by submitting a question through this system, Buyers will also contact you through this system for any changes / information relating to the contract. (This is the only way to contact the relevant buyer) Please select 'Messages'.



Your Response | RESP34915

✕ Decline 💬 Messages 📄 Validate 📄 Save Draft ✅ Submit

English (United Kingdom) ▾

Jemma Ford ▾
CCBC Procurement Services

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 ▶

▼ Request Documents (7)

▲ About You

Please use this text area to provide additional information

▲ Request Overview

Your Response | RESP34915

Decline Messages Validate Save Draft Submit

English (United Kingdom)

Jemma Ford
CCBC Procurement Services

There are currently no messages between you and the customer. Please enter a subject and text below to send a new message.

Subject

Text

Attach files... Or drag and drop files here

Send Cancel

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

Request Documents (7)

About You

If you wish to create a new message, as shown in the screen above, please enter the subject and your text you can also attach a document by clicking on the attach files, once the message is complete click Send

Please make messages as detailed as possible, so the buyer is fully informed of the issue and can respond promptly.

PLEASE NOTE: There is a clarification period deadline when buyers are able to answer all questions, this will be clearly stated within the tender document, please make note of the date as officers are unable to clarify questions after the deadline.

Your response will be given a RESP number this will be your response number for submitting your tender and will be your identification number.

To view the tender documentation click on Request Documents this will drop down and provide the list of documents relating to the tender opportunity provided by the Lead Officer

The screenshot shows the 'Your Response' interface for response number 'RESP34915'. The user is logged in as Jemma Ford, CCBC Procurement Services. The interface includes navigation buttons for 'Decline', 'Messages', 'Validate', 'Save Draft', and 'Submit'. Below these are tabs for 'General', 'Lots', 'Questions', and 'Attachments'. The 'Request Documents (7)' section is expanded, showing a table of documents with a 'Download' column containing icons for each document.

Name	Type	Download
Sustainability Procurement Policy - Welsh	Generic Documents	
OJEUContractNotice2018-OJS018-036258-en	Generic Documents	
OJEUContractAwardNotice2018-OJS081-180627-en	Generic Documents	
FINALVersion MoU V3 20181113NewApplicants	Generic Documents	
Appendix1CCBCPoliciesProceduresDocument	Generic Documents	
Appendix2CCBCServicesTermsConditions	Generic Documents	
Appendix3EXAMPLETenderReturnForms	Generic Documents	

The view each document click on the icon underneath download, this will bring up a pop up box on the bottom of the screen, click on Open to view or save to save to your computer.

These documents can viewed through at any time while the tender is open. Once closed you will be unable to view the documentation.

About You – This is where you can provide any additional information about your company **This is not mandatory and will not be marked**

Request Overview – This is where you can view the tender information e.g Closing Date and description of the works / goods / services required

Lots – This is where you can indicate if applicable which lots your business would like to bid for. You can do this by clicking the tick box next to Opt-in?

Your Response | RESP34915

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

Decline Messages Validate Save Draft Submit


English (United Kingdom)

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General **Lots** Questions Attachments

Lot 1 Lot 1 - Electrical	Opt-in? <input checked="" type="checkbox"/>
Lot 2 Lot 2 - Plumbing and Legionella	Opt-in? <input checked="" type="checkbox"/>
Lot 3 Lot 3 - Flooring	Opt-in? <input checked="" type="checkbox"/>
Lot 4 Lot 4 - Windows and Doors	Opt-in? <input checked="" type="checkbox"/>
Lot 5 Lot 5 - Kitchen and Laundry Equipment & Maintenance	Opt-in? <input checked="" type="checkbox"/>

Questions – This is where you you complete your tender response by clicking on each section where the questions can be answered. The majority are text questions where you type the answer into the box. There are some which require attachments to be added.



Your Response | RESP34915

✕ Decline 💬 Messages 📄 Validate 📁 Save Draft ✅ Submit

English (United Kingdom)

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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 ⏩

Please complete the following questionnaire from Caerphilly County Borough Council. 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 : GENERAL INSTRUCTIONS - PLEASE READ (12 questions)
- 2 : SECTION A - SUPPLIER DETAILS (13 questions)
- 3 : SECTION B - LOT DETAILS (5 questions)
- 4 : SECTION C - SUPPLIER ACCEPTABILITY (11 questions)
- 5 : SECTION D - ECONOMIC / FINANCIAL STANDING (12 questions)
- 6 : SECTION E - CAPACITY & CAPABILITY (12 questions)
- 7 : SECTION F - EQUAL OPPORTUNITIES, WELSH LANGUAGE & ETHICAL EMPLOYMENT IN SUPPLY CHAINS (7 questions)
- 8 : SECTION G - SUSTAINABILITY (3 questions)

Click on the arrow next to the section number to show the questions.

 **5 : SECTION D - ECONOMIC / FINANCIAL STANDING** (12 questions)

This section is Pass / Fail, please complete all relevant questions

5.01 Are you registered for VAT? If so, please provide your VAT Number: *

5.02 FS.GEN.02 FSGen002a01v02 Is your organisation (please indicate the option that applies): *


5.03 If you answered "Other" to question 5.02 please specify:

5.04 FSGen002b01v01 Provide your company or LLP registration number (if applicable).



Where a file attachment is required you will see the Attach File option (As below)

5.08 FSGen006b01v02 Please attach your Public Liability Insurance Certificate: *

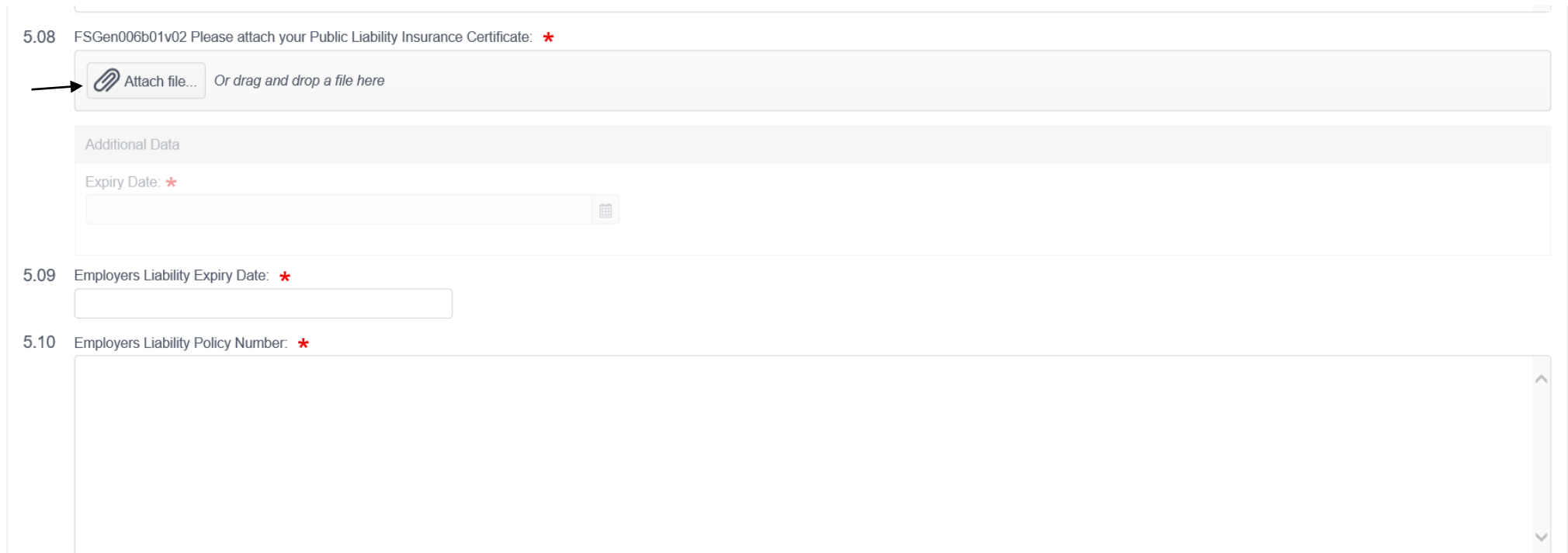
 Attach file... Or drag and drop a file here

Additional Data

Expiry Date: *

5.09 Employers Liability Expiry Date: *

5.10 Employers Liability Policy Number: *



Click on the Attach file icon, pop up box will appear where you can search for the correct file to attach, once you have located the file double click to add to the tender response. Once the document is visible it will be highlighted green with 100% at the end, confirming it has uploaded.



5.08 FSGen006b01v02 Please attach your Public Liability Insurance Certificate: *

Attach file... Or drag and drop a file here

Done ✓

Doc1.docx

100% ×

Additional Data

Expiry Date: *

5.09 Employers Liability Expiry Date: *

5.10 Employers Liability Policy Number: *

****IMPORTANT**** Those questions which are mandatory are highlighted with a Red astrix at the end these must be complete or your tender response will not be able to be submitted.

If you try to submit without a mandatory question being completed you will receive the following error message:

Your Response | RESP34915

✕ 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
→

! Please complete the following questionnaire from Caerphilly County Borough Council. 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 : GENERAL INSTRUCTIONS - PLEASE READ (12 questions) !

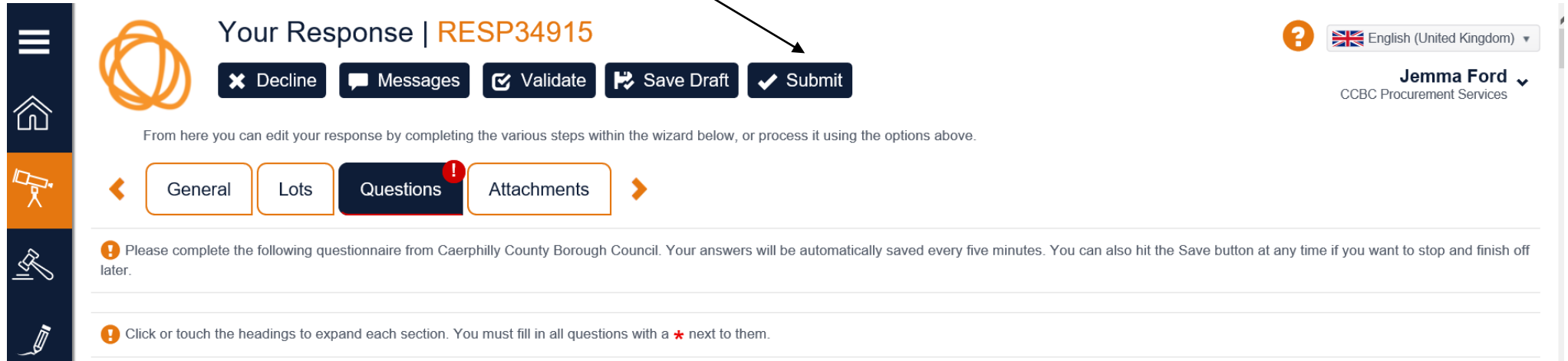
IMPORTANT – PLEASE READ THIS SECTION BEFORE COMPLETING ANY QUESTIONS

- 1.01 Response Closing Time - As this is an application to join the DPS, once you are satisfied with your response and submitted if the application will close and send a message to the appropriate officer to evaluate.
- 1.02 Pre-Populated Information – If you have previously tendered for contracts with the Council via the Proactis System then some fields of your tender response may already be pre-populated. If this is the case, please ensure that all pre-populated fields and attached documents are checked and are deemed to be valid.
- 1.03 Message / Dialogue Facility – Please use the message facility within the opportunity you are responding to, to ask any questions relating to the tender. All dialogue should be conducted via the portal, we will not accept any questions/queries via telephone/email. Please note: The deadline for asking clarification questions regarding the opportunity will be specified in the tender.
- 1.04 System Timeout – The Proactis Portal has a timeout period of 30 minutes; your answers will be automatically saved every five minutes, however to ensure that all information is captured we advise that you also save at regular intervals
- 1.05 Attachments Section (Questionnaire) – Attachments that are required as part of the questionnaire will need to be uploaded within the questionnaire section.
If an Attachment in the questionnaire is mandatory but does not apply to your organisation then please attached a blank document stating Not Applicable to ensure that you can submit your response.
Only one attachment per question can be uploaded and the maximum size of the document cannot exceed 10mb, however you may upload .zip files as an attachment if more than one document applies to your response.
- 1.06 Attachments Section – Attachments within the separate 'Attachments' Section – There is no limit on the number of attachments that can be added to this section. The maximum size of each document must not exceed 25mb. You should be aware that the Broadband speed and capacity will affect the time taken to upload the attachments.

If you would like to save a draft copy of your response to continue working on another day, go to the top of the screen and click on Save Draft (As Above) – This will make the response visible the next time you want to work on your response prior to submitting. To retrieve the response follow the same steps as searching for an opportunity. Your answers already completed will be saved.

Once you are happy and have checked all your answers click on Validate (As above) which can be found at the top of the page, this provides an additional validation that all mandatory questions have been answered.

Once all validations have been accepted click Submit. You will then be provided with your response number again on the screen advising your response has been submitted.



The screenshot shows a web application interface for submitting a response. On the left is a dark blue sidebar with icons for a menu, home, a telescope, a gavel, and a pencil. The main header area contains an orange logo, the text "Your Response | RESP34915", and a row of five buttons: "Decline", "Messages", "Validate", "Save Draft", and "Submit". An arrow points from the text above to the "Submit" button. In the top right corner, there is a language dropdown menu set to "English (United Kingdom)" and a user profile for "Jemma Ford" with "CCBC Procurement Services" below it. Below the header is a navigation bar with four tabs: "General", "Lots", "Questions" (which is active and has a red exclamation mark icon), and "Attachments". Below the navigation bar are two informational messages, each starting with a red exclamation mark icon. The first message states: "Please complete the following questionnaire from Caerphilly County Borough Council. 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." The second message states: "Click or touch the headings to expand each section. You must fill in all questions with a * next to them."