

Step by Step Supplier Guide

То

University of Surrey e-Tendering System

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Introduction

This **Step-By-Step Guide** is provided to assist you in using the (In-tend) e-tendering 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 out Support team by phoning 0844 2728810 or emailing support@in-tend.co.uk

Registering on the e-Tendering system

Visit <u>https://in-tendhost.co.uk/universityofsurrey/aspx/Home</u> to access the (In-tend) supplier portal.

From the homepage click on Register



Registration process

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

For cases where this person or inbox may be unavailable, we strongly recommended you add an **Additional User** (located at the bottom of the screen) so they can gain access to the site and also receive a copy of the emails. All Yellow fields are mandatory

		egister your company / organisation details. already registered on this site but you are a new user who requi	es access, please contact one of t
registered contacts	ts and ask them to add you as a new		
PLEASE NOTE: Yell	low fields are MANDATORY		
Company Details	s		
Company Reg No		I do not have a Company Reg Nu	mber 🗆
Company Name :		Address Line 1 :	
Address Line 2 :		Address Line 3 :	
Address Line 4 :		Post Code :	
Country :	United Kingdom		
_			
Contact Details			
Contact Details Telephone :		fax:	
Telephone :			
		Fax :Construction Line No :	
Telephone :			
Telephone :			
Telephone :			
Telephone : Web Site : Primary User Det		Construction Line No :	
Telephone : Web Site :			
Telephone : Web Site : Primary User Det		Construction Line No :	
Telephone : Web Site : Primary User De Contact First Nam		Construction Line No :	
Telephone : Web Site : Primary User Det Contact First Nam Telephone :	ne :	Construction Line No :	

In-Tend Limited is a company registered in England and Wales. Company Registration Number : 5845701 • VAT Registration number : GB 886 4167 79 Page 3 of 16



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

		are registered as they would still be able to gain access. plete you may login to your account and add as many
additional contacts as y	arter the registration is com	perce you may nogen to your account and act as many
Additional User Detail		
Contact First Name :	Contact Last Name :	
Telephone :	e-Mail :	
Confirm e-Mail :	Password :	
Confirm Password :]	
		Register My Company

In the **Business Classifications** tab you are able to add the business category codes relevant to your company. 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. You can add multiple categories.

Once you are happy with the details click on Register My Company

ompany Details	Business Classifications	
Classifications		
Search :		Search Clear
Category	Title	
	Unspecified	+
A	Audio-Visual & Multimedia	+
AA	Audio Equipment including Video Conferencing, Televisions, Videos	+
AB	Display/Projection Equipment & Consumables	+
AC	Learning Packs	+
AD	Music	+
AE	Photographic Equipment Supplies & Services	+
AF	Studio Costs	+
24	Theater Costs	+ 🖻
Category	Title	
		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.



Once registration is complete, the system will then thank you for registering and inform you that your details are being processed. You will then shortly receive an email with confirmation of your email and password.

Thank you for registering with the Company electronic tendering web site.	
Your details are awaiting processing, and each contact will be sent an email to confirm their registration has been accepted.	
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 and password.	
Upon receipt of the registration e-mail you will be able to login to your secure area of the web site.	

Managing your Company Details

If you need to update your company information you can do this from 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.

Home Buyers Profile Mer	sages Tenders Contracts Company Details Help Logout
mpany Details	
etails Documents Business Cate	gories Contact Details
Address Company Banking	Insurance Other Accreditation
Company Name :	RHG Supplies
Address Line 1 :	1 A Road
Address Line 2 :	
Address Line 3 :	
Address Line 4 :	London
Postcode :	SW1
Country :	United Kingdom
Telephone : Fax :	0123 456789
Website :	
Company e-Mail :	
Publish e-Mail :	j.blogs@bloggs.co.uk
Enquiries e-Mail :	
Health and Safety e-Mail :	
	Save Det

Please note that it is important that you do keep your details up to date, particularly your contact email addresses as you may miss out on tender opportunities which may be of interest.

Tender Opportunities

To access 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. For a tender that you are interested in you should click **View Details**

Home Buye	rs Profile	Messages Tenders Contra	scts Register Help
Tenders			
Search		A 123 Stationery contract	🜩 Date documents can be requested until: 08/01/2012
Current Forthcoming Awarded Show all.	_`	Description	In-Tend Bd are currently out to tender for the Stationery contract which will run for a three year period starting from the fat March 2012. If you are interested in being involved with the tender please express an interest, you will then be sent further details in the tender documentation. The closing date for return of tenders is the 31st January 2012 at 12 noon. Please note that you will not be able to make a networm after the details or gehave ensure you appli sufficient time to make your electronic return. Any questions relating to the tender should be forwanded via the Correspondence functionality.
Customer			View Details
Al			
		ala Li	Date documents can be requested until: 15/12/2011
		Description	test
			View Details
		1010 1010	Date documents can be requested until: 15/12/2011
		Description	test
			View Details
		#P5.Q1	Date documents can be requested until: 15/12/2011
		Description	test
			View Details

From the Tender Management screen you are able to **Express Interest** in the tender.

Tender Management	
Tender	
A 123 Stationery contract	
Title :	A-123 Stationery contract
Reference :	A-123
Description :	In-Tend Ind are currently out to tender for the Stationery contract which will run for a three year period starting from the 1st March 2022. If you are interested in being involved with the tender please express an interest, you will then the sent further details in the tender documentation. The closing date for return of tenders is the 11st lanaray 2012 est 12 noon. Please note that you will not be able to make a return after the deadline so please ensure you applo sufficient time to make your electronic return. Any questions relating to the tender should be forwarded via the Correspondence functionally.
Contact :	Ruth Gambling
Contract Start :	01/03/2012
Contract End :	28/02/2014
Date documents can be requested until :	06/01/2012
	Express Interest



You will then be asked to either log into an existing account or register a new one.

Once you have expressed your interest you will instantly see an update as to your status in the tender process and it will tell you that your expression of interest is being processed.

Ten	ider Management	
You	Expression of Interest in the tender is being progressed by us	
Ter	sfer Correspondence History	
	A-123 Stationery contract	
1	litle :	A-123 Stationery contract
F	Reference :	A-123
6	Description :	In-Tend Ind are currently out to tender for the Stationery contract which will run for a three year period starting from the 1st March 2012. Byou are interested in being involved with the tender please express an interest, you will lene be sent further details in the tender please express an interest, you will sen be sent further details in the tender documentation. The closing date for return of tenders is the 31st lanaray 2012 at 12 room. Resen note that you will not be able to make a return after the deadline so please ensure you applo sufficient time to make your electronic return. Any questions relating to the tender should be forwarded via the Correspondence functionality.
¢	Contact :	Ruth Gambling
0	Contract Start :	01/03/2012
¢	Contract End :	28/02/2014
0	Date documents can be requested until :	08/01/2012

Once your expression of interest is received and accepted by the organisation (this may not happen straight away) you should receive an email saying that you have received tender documents and you should login to the secure area of the website to access them. If documents are immediately available, you will be taken straight to the latest tender stage screen.

If you are not currently logged in, from the homepage you should enter your email address and password then click **Login**.

e-Mail Address :
Password :
Login
Forgotten Details
Register
NOTE: Please be aware that failure to provide correct login information <u>three</u> times will result in your account being locked

*Please note that you are given three attempts to enter your email address and password. Please ensure you click the **Forgotten your Password** button if you cannot remember your details otherwise your account will be locked!

Once you are logged in, go to the **Tenders** section at the top menu bar and click on **My Tenders**, find the tender that you are dealing with and click **View Details**. From the Tender Management section, you can easily see what your status is within the tender process. You will be able to see tabs running across the top. The tab which is **RED** is the current stage of the tender process (eg. Pre Qualification Stage, Invitation to Tender stage).

ender Management	
our return has not yet been sent	
Tender III Correspondence History	
A-123 Stationery contract	
Title :	A-123 Stationery contract
Reference :	A-123
Description :	In-Tend Itd are currently out to tender for the Stationery contract which will run for a three year period starting from the 12t March 2012. If you are interreted in being involved with the tender place express an interret; you will then be set further details in the tender documentation. The closing date for return of tenders is the 31st January 2012 at 12 noos. These note that you will not be able to make a terum after the deadline so please ensure you applo sufficient time to make your electronic return. Any questions relating to the tender should be forwarded via the Correspondence functionally:
Contact :	Ruth Gambling
Contract Start :	01/03/2012
Contract End :	28/02/2014
Date documents can be requested until :	08/01/2012

Submit Tender Return

If you click on this tab (e.g. 'ITT') you will go into the section where you can access the tender documents. At the top of this section you will see instructions as to how to attach and submit documents which you should read carefully as they talk you through step by step. In this section you will see the follow headings:

- Tender Documents Received: View and/or download tender documents received
- My Tender Return: If any mandatory documents have been requested, they will be shown in the My Tender Return section against a *Red* button. You will need to attach them using the Attach Documents button within the My Tender Return section at the bottom of this screen.
 If a Questionnaire is required to be completed, it will be shown in *Red* and marked Not Started in the My Tender Return section. It is mandatory that any Questionnaire's must be completed.
- Attach Documents (if available): Attach any additional documents you wish to return as part of your tender submission; these will upload to the **My Tender Return** section.
- **Submit Return:** Click the Submit Return button only when you are completely happy that you have all the documents uploaded that you need to submit.

- 2 any ma Attach De
- If any mandatory documents have been requested, they will be shown in the My Tender Return section against a Red button. You will need to attach them using the Attach Documents button within the My Tender Return section to the bottom of this screen.
 If a Questionnaire is required to be completed, it will be shown in Red and marked Not Started in the My Tender Return section. It is mandatory that any Questionn must be completed.
 To attach additional documents you wish to submit as part of your tender return, click the Attach Documents button under the My Tender Return section. (If availab These will then appear in the My Tender Return section.)
- NOTE : Large files may take some time to upload. We advise you to keep the files under SMB.
- When you have completed all the above steps and are ready to submit your tender return, click the red Submit Return at the bottom of this page

we : 08/12/2011 13:59:39 Due Date : 31/01/2012 12:00:00 Time Re B Weeks 22 Hours 20

Tender Details	
Stage Name	ITT
Description	This is the Invitation to Tender stage
Closing Date	31/01/2012
Stage Start Date	08/12/2011
Project Title	A-123 Stationery contract
Project Description	In-Tend Indi are currently out to tender for the Stationeny contract which will run for a three year period starting from the 1st March 2012. If you are interested in bear involved with the tender please express an interest, you will thom be sent further details in the tender documentation. The closing date for return of tenders is the 131 Annuary 2012 at 12 noor. Please note that you will not be able to make a return after the deadline so please ensure you applo sufficient time to make your electronic return. Any questions relating to the tender should be forwarded via the Correspondence functionality.

Tender Documents Received	Description	Options
In-Tend sample ITT.doc		View Download
Tech spec.doc		View Download
In-Tend sample TandCs.doc		View Download

My Tender Return	Description	Option	
Insurance - Private Liabilit	y Upload copy of Insurance certificate	Upload Document	
Health And Safety	Upload copy of Health and Safety Policy	Upload Document	
	Select documents you wish to add to the My Tender Return section above	ve using the Attach Documents button below.	
	NOTE : Large files can take some time to upload. We advise	you to keep file sizes under SM8.	
	Attach Documents		
Submit My Return			
	When you have completed all the above steps and are ready to submit you	a tender return, click the Submit Return button.	
	Submit Return		

Once you have submitted your return you will be able to view a Return Receipt which confirms all the details of your submission. This will always be available to view within the History tab.

Return Receipt	Return Receipt							
Print								
Here is the receipt of your Return Submission. Please Print a hard-copy for your records								
Tender :	A-123 Stationery contract							
Stage :	TT							
Submitted At :	08/12/2011 15:26							
Submitted By :	A Perdon							
Submitted By (e-Mail) :	a person@in-tend.co.uk							
Documents Returned : 3 item(s)								
In-Tend sample Supplier Insurance Po	xicy - Indemnity.doc (Insurance - Private Liability)							
In-Tend sample HandS policy - supple	In-Tend sample HandS policy - supplier.doc (Health And Safety)							
In-Tend sample Supplier response.do	In-Tend sample Supplier response.doc (Attached Document)							
Close								

If for any reason you wish to amend your return you may be able to do so by going into the stage tab again. The screen visible will show you all the documents that you returned as part of your original submission. If you want to remove any documents or add additional documents you can do this now.

Please note you should ensure that ALL the documents which you wish to be evaluated as part of your tender return are included in the My Tender Return section before you click on Modify Return as you are overiding the first return!

Tender Documents Received	Description	Options
In-Tend sample ITT.doc		View Download
Tech spec.doc		View Download
In-Tend sample TandCs.doc		View Download
My Tender Return	Description	Options
In-Tend sample Supplier Insurance Policy - Indemnity.doc	(Microsoft Word Document) Insurance - Private Liability	View Download Remove
In-Tend sample HandS policy - supplier.doc	(Microsoft Word Document) Health And Safety	View Download Remove
In-Tend sample Supplier response.doc	(Microsoft Word Document)	View Download Remove
Return Submitted		
	You have made a previous return for this ter	der on 08/12/2011
		documents not included in the subsequent return will not be considered. All I bid as this replaces your first and existing bids.
You must pres	s the 'Submit' button again, in order to subm	it any subsequent modified returns.
	Modify Return	

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Correspondence

This procedure is used to receive and send a communication regarding a tender/contract via the website.

If you receive Correspondence you will firstly receive an email alert informing you of this. You will need to login to the secure area of the system to view it. When you first login you will see on the homepage in red a prompt to say that there are unread correspondence. If you click on the link it will take you straight through to the message.



Alternatively, you can view the message through the Tender Management screen where it will tell you in brackets how many correspondence there are in the Correspondence tab. You can view the message, view any attachments and also make a reply.

a subset has been excluded by the					
ir return has been received by us					
nder	History				
contribution (1)					
Correspondence					
Search	C Date	C Subject		Amoci	eted
	08/12/2011 15:			2	A-123
leceived	38/12/2011 15:	39	Ø		A-123
ent 💡					
hread	Message	Attachments Reply			
	_				
lead ihow all_	Subject:	A-123			
	Subjects		en successul in winning the	Stationery contract	
ihow all.	Subject:	I am pleased to inform you that you have be	-	Stationery contract	
ihow all.			-	Stationery contract	
ihow all	Subject: Message:	I am pleased to inform you that you have be	-	stationery contract	
ihow all.		I am pleased to inform you that you have be	-	Stationery contract	

You can also view Correspondence through the Messages tab at the top of the screen

Home Duyers Profile	Messages 👻 Tenc	kers 🤟	Contracts 🚽	Company Details	Help	Logout
User: A Perdon Company: A Supplier	Correspondence Clarifications	secure area of the web site				
Logovt	Actions					

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Clarifications

If there are any Clarifications made against the tender you can access them by viewing the tender details and a new tab will appear. It will tell you how many clarifications there are in brackets. Click on the Clarifications tab to view.

Tender Management				
Your return has been received by us				
Tender III Correspondence ((1) Clarifications	(1) History		
Clarifications				
Search	2 Added	🗘 Tale	Project	
Read %	08/12/2011		A-123 Clarification 1	
Unread Show all.	Carification			
Filter	Name:	A-123 Clarification 1		
Stage None		Question: xyz Answer: xyz		
	Description:			
		A (13.04)		
	Date:	08/12/2011		

NB. If you require clarification regarding the tender you should send your clarification request via Correspondence

Actions

This procedure is 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.



You will be taken you to this screen where you can view details of the action placed against you.

Actions						
Search	≑ Due Date	\$ Who	Associated	🗘 Status	Raised Date	Description
Cutstanding Completed Show all	14/12/2011	A Perdon	A-123 Stationery contract (ITT)	Not Completed	08/12/2011	Associated With Stage : A-123 Stationery contract - ITT Please provide the following information:
Filter Project	Action					
None	Date Due:	14/12/2011				
Contract	Who:	A Perdon				
None	Raised Date:	08/12/2011				
	Status:	Not Comple	ted			
	Project (Stage)	A-123 Statio	nery contract (ITT)			
	Description	Associated V	Vith Stage : A-123	Stationery contrac	1 - ITT	
		Please provi	de the following in	formation:		
		View Stage				Complete Action

Read through the Action and make sure everything requested is completed then click **COMPLETE ACTION.**

Tender History

Within the My Tenders section you will see the History tab where there is a log of your involvement of the tender, right from your expression of interest to the current status.

Fender Management						
Congratulations, you have been so	accessful in winning this tender					
Tender ITT Corresponden	er (1) Clarifications (1) Actions History					
Date	Description	Page 1 of 2 Next				
01/12/2011 13:12	You were successful in winning this tender					
01/12/2011 13:12	Your return is being considered by us for Stage TTT					
01/12/2011 13:11	Your return was opened by us for Stage TTT'	Your return was opened by us for Stage TTT				
01/12/2011 12:46						
01/12/2011 12:40	Your return was received by us for Stage TTT					
01/12/2011 12:40	Your return has been sent to us for Stage TTT	View Receipt				
01/12/2011 12:27	You started processing the tender documentation for Stage TIT'					
01/12/2011 12:27	You received tender documentation for Stage TTT					
01/12/2011 12:27	A new Stage has been published					
01/12/2011 12:27	Your Expression of Interest is being considered for the next Stage					



Contracts

You can view a summary of what Contracts the Institution has running from the **Contracts** heading at the top menu bar (may not be available with some institutions).

Home Buyers Profile	Messages 🛫	Tenders 🛫	Contracts	Company D	rtails Hely	Logout		
ntracts								
arch	🔶 A/123 Stati	onery contract					¢1	xpiry Date Not Set
Contracts	Description	This is the Station	nery contract whi	ch will run for a peri	d of three year	s starting from the	1st September 201	
rent	Name	A/123 Stationery	contract					
ring w al								View Details
ter stomer	Another Good	Company -3 Yea	r Cleaning Cont	rect			Екр	ry Date 31/12/2015
	Description	Contract bety	veen Us & Anoth	er Good Cleaning C	ompnay to prov	ide cleaning etc et	ic .	
	Name	Another Goo	d Company -3 Ye	ar Cleaning Contra	t			
								View Details
	Supply of Desl	ttop PC's					L	xpiry Date Not Set
	Description			test description				
	Name			Supply of Desktop	PC's			
								View Details
	test boolean o	ontract					Екр	ry Date 07/10/2011
	Name		test boolean	contract				
								View Details

If you are the contracted supplier you should log into the secure area of the website to be able to view specific contract information/documentation.

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.





Contract Documents

Contract Documents can be viewed in the Documents tab within the Contract Management section.

Some documents may have viewing rights only which you cannot replace eg. official contract, agreed terms and conditions etc.

Other documents may be for you to manage and keep updated eg: insurances, policies etc...

If you are required to upload a new revision of a document that has expired you will receive an email alert. You should login to the secure area of the website where you will see a prompt in red that contract documents require upload.



To upload these documents you should click on the red prompt or go into **My Contracts**, click **View Details** of the relevant contract and then click the **Documents** tab.

Contract Man	agement
Contract Doour	nert Correspondence
A/123 Stationer	y contract
Description :	This is the Stationery contract which will run for a period of three years starting from the 1st September 2011
Name :	A/123 Stationery contract

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Managing Contract Documents

From the documents tab you can view contract documents and replace/upload documents that you are responsible for maintaining.

You will be able to see a Replace button for the documents that may have expired (eg. Insurances) or that can be updated as and when (eg policies). You will also see a red Upload Document button for documents that have been requested by the contracting institution. If there is an expiry date in place you will be reminded until you upload the required document.



If you require any additional information or help, please contact the In-tend Support Desk.

In-tend Support Tel: 0844 2728810 Email: <u>support@in-tend.co.uk</u>

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