

DFID Portal – Help and Guidance

Together with the Frequently Asked Questions (FAQs) this guidance will answer all your queries about the DFID Portal.

The DFID Portal provides a simple efficient means of interaction between DFID and the organisations to which we pay money ie suppliers of goods and services or grant recipients.

All of DFID's business administered from the UK will require suppliers and fund recipients to register through the DFID Portal.

The benefits of the DFID Portal include

- quicker payments as your record will be up to date;
- opportunity to supply DFID with key information and expertise for future planning and business needs;
- You can be alerted to future contract opportunities in your category of expertise;
- introduction of e-tendering – reducing costs for DFID and suppliers
- you can view details of your invoices either paid or being processed by DFID
- ability to update records instantly without the need for paper submissions to DFID

Security

Access to your details is protected by a password and username. If you have forgotten your password you will need to enter the contact e-mail address we hold. Your username and password will be sent to this e-mail address.

DFID has taken steps to ensure the DFID Portal is secure and that your bank and any other commercially sensitive information are protected. However, you do have a responsibility to ensure your username and password are safeguarded and that your contact e-mail is available only to people who have authority to view and amend the payment details we hold for you. You should ensure you are familiar with the Terms and Conditions for use of the DFID Portal.

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Use of screen shots. This guidance uses views of the various screens within the DFID Portal to help you. In some cases the actual screen you are viewing might be slightly different from the screen shot but the guidance provided will still be appropriate to that screen.

DFID Portal Welcome (Log-in) Page

DFID Portal Guidance and Instructions
Terms and Conditions

Existing Supplier/Fund Recipients

Please enter your username and password then select the Login button below.

Username

Password

Login **A**

Forgotten password?

New Suppliers/Fund Recipients

Please ensure you have read the guidance and instructions as well as the Terms and Conditions before proceeding.

To register your organisation and create an account, please select the Register button below.

Register **B**

Welcome to the DFID Portal. This interactive Portal is provided for all DFID direct suppliers and fund recipients with the aim of improving business processes and reducing costs.

The Portal is:

- The central source of information for all DFID contract opportunities and contracts awarded available free of charge
- An on-line register for all suppliers and fund recipients doing business with DFID
- A platform for DFID to conduct e-tendering with suppliers

Existing Suppliers and Fund Recipients:

Please enter the DFID portal using your username & password or the instructions sent to you. You should familiarise yourself with the Terms and Conditions for use of the DFID Portal.

Guidance and Help is available on the DFID Portal Pages and on the DFID website.

Future business with DFID:

If you are a supplier or fund recipient and want to register for future contract opportunities or to simply provide us with your organisations (including payment) details please use the register link (and follow the instructions provided).

If you simply wish to view current contract opportunities and details of contracts awarded click on the Bulletin Board link below.

Bulletin Board **C**

DFID's over-riding aim is to obtain value for money through robust procurement strategies and processes aligned with key DFID policies such as pro-poor growth and labour standards. DFID wishes to work with organisations and suppliers who embrace our values and demonstrate Corporate Social Responsibility (CSR) by taking account of economic, social and environmental factors. We encourage you and your supply chains to comply with the International Labour Organisation (ILO) standards.

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There are three areas to the login page marked as A, B and C in the screen shot above.



is where existing suppliers and fund recipients log in using their username and password



is where new suppliers and fund recipients register



Within the main text there is a link to the bulletin board where you can search for contract opportunities in DFID as well as contracts which have been awarded. You do not need to log in to the DFID Portal to use this search facility

These sections are covered in more detail below.

Existing Suppliers/ Fund Recipients

Section A is where you enter your username and password to access the details that DFID holds on you. If you have forgotten your username and/ or password you can use the forgotten password link to have these details sent to you.

Forgotten password

If you have forgotten your username or password you should use the forgotten password link. This will bring you to the page below where you should enter your e-mail address in the box. If the contact e-mail address that DFID holds agrees with

the e-mail address you submitted then you will be sent an automated e-mail with your username and password.

DFID Department for International Development

Forgotten Password

DFID Portal Guidance and Instructions
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Please enter your email address below and select the continue button. Your username and password will be emailed to you shortly.

Email

Continue

Continue

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What if the e-mail address is not recognised

If the e-mail address does not match the one DFID holds then you will get the message below.

DFID Department for International Development

Register

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Please enter your email address below and select the continue button. Your username and password will be emailed to you shortly.

No user account matches the email address specified.

Email

Continue

Continue

W3C WAI-AI WCAG 1.0

You should find out who is the contact we hold within your organisation and either have them use the DFID Portal or get them to add your contact details. This is done in the [addresses](#) section. If you cannot find the contact you can e-mail DFID at Query-DFIDPortal@dfid.gov.uk. After we have checked your validity we will change the e-mail contact for your organisation which will allow you to use the forgotten password process. You should note this change will take a number of working days as we will need to be satisfied that the change is appropriate. We take the safeguard of the information we hold on your organisation very seriously.

Bulletin Board

The Bulletin Board is where details of DFID current contract opportunities and of contracts awarded.

The search criteria allow you to determine what type of contract information you obtain.

Keyword or Contract ID	If you know the title of a contract or the DFID 4 digit reference number enter it here
Country	To view all DFID contracts select All or to view for one country select from the dropdown list
Current/ Awarded	Current views active opportunities for a DFID contract. Awarded shows were contracts have been awarded.
Display tenders	“Current opportunities only” shows active competitions for DFID contracts for which you may register an interest. All shows all.

When you have completed the search criteria click on the search icon. The results will be shown underneath the results banner.

The screenshot displays the 'Public Bulletin Board' search interface. On the left, there are navigation links and a key explaining deadline indicators. The main search area contains the following criteria:

- Keyword or Contract ID: climate
- Country: All
- Current / Awarded: Current
- Display tenders: Current opportunities only

The search results section shows one result:

Tender	Stage	Country	Inv. Only	Deadline
4421: Support to the Development of the Climate Change Centre Climate change will have a profound impact on poor people, but the knowledge on future climate change that is needed to integrate climate change in development planning and assistance is largely conce ...	Engagement	Procurement		09/09/2008 12:00

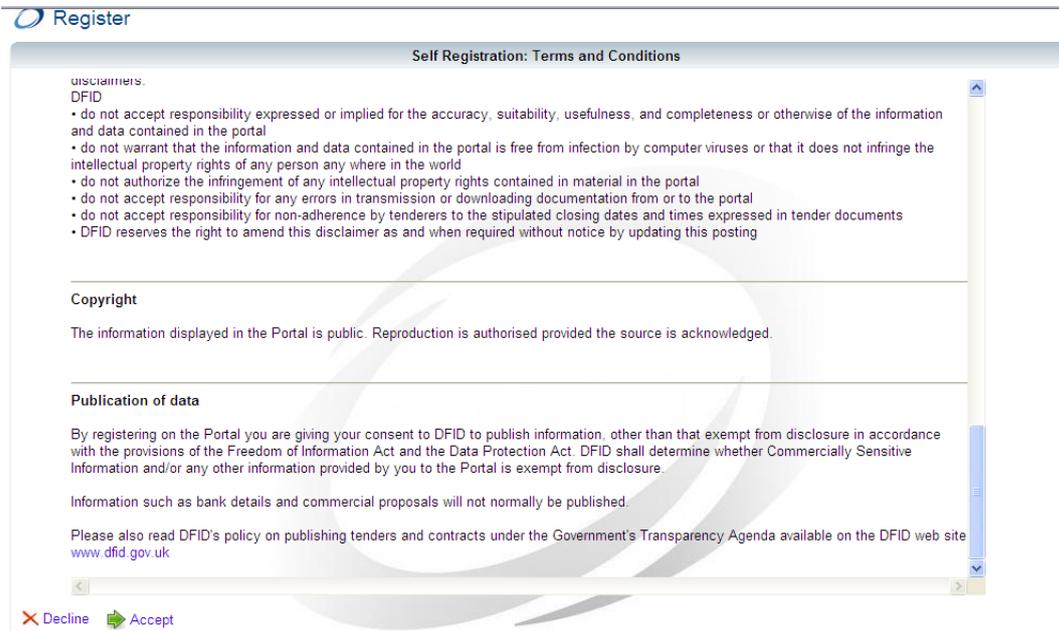
To obtain more details, including registering your interest, click on the blue title. To register an interest you will need to be registered on the DFID Portal. Registered users have a private bulletin board which can be set up to show tender opportunities that fit in with their profile

New Suppliers & Fund Recipients

If you are interested in bidding for DFID contract opportunities or have been instructed by a DFID official to enter your payment details you must register on the DFID Portal. From the DFID Portal login page click on the Register icon.

Terms and Conditions for Use of DFID Portal

You will be asked to agree to the terms and conditions for use of the DFID Portal. You should read and ensure you understand them before using the DFID Portal. To continue click on “Accept”.



The screenshot shows a web browser window with the title "Self Registration: Terms and Conditions". The page content is as follows:

disclaimers:
DFID

- do not accept responsibility expressed or implied for the accuracy, suitability, usefulness, and completeness or otherwise of the information and data contained in the portal
- do not warrant that the information and data contained in the portal is free from infection by computer viruses or that it does not infringe the intellectual property rights of any person any where in the world
- do not authorize the infringement of any intellectual property rights contained in material in the portal
- do not accept responsibility for any errors in transmission or downloading documentation from or to the portal
- do not accept responsibility for non-adherence by tenderers to the stipulated closing dates and times expressed in tender documents
- DFID reserves the right to amend this disclaimer as and when required without notice by updating this posting

Copyright

The information displayed in the Portal is public. Reproduction is authorised provided the source is acknowledged.

Publication of data

By registering on the Portal you are giving your consent to DFID to publish information, other than that exempt from disclosure in accordance with the provisions of the Freedom of Information Act and the Data Protection Act. DFID shall determine whether Commercially Sensitive Information and/or any other information provided by you to the Portal is exempt from disclosure.

Information such as bank details and commercial proposals will not normally be published.

Please also read DFID's policy on publishing tenders and contracts under the Government's Transparency Agenda available on the DFID web site www.dfid.gov.uk

At the bottom of the page, there are two buttons: "Decline" (with a red 'X' icon) and "Accept" (with a green checkmark icon).

You will be asked to key information to allow us to check DFID does not already hold your details. The fields marked with stars are mandatory. Please also pay attention to the requirements for usernames and passwords in terms of number of and allowed characters for example the DFID Portal will not allow your password to be password.

Register

DFID Portal: Guidance and Instructions, Terms and Conditions

- Links
- Welcome Page

Self Registration

Please enter the following information to start the registration process, then select Register. An activation email containing an activation link will be sent to the email address you enter. Click on the link contained within the email to activate your account.

Mandatory fields are marked with *

Company Name

Your Title

First Name

Last Name

Job Title

Email

Confirm Email

Phone

Address line 1

Address line 2

Address line 3

Address line 4

Town

County

Post code

Country of registration

Minimum 8 chars, alphanumeric characters only

Username

Minimum 8 chars, alphanumeric characters only

Password

Please enter a security question to help us identify you, e.g. pet's name

Security Question

e.g.lover

Security Answer

If there is already a record, or very similar, the DFID Portal will inform you. If your organisation already has a record you should log on using those details (the section on Existing Suppliers/ fund recipients covers this including where you have forgotten your username and password). Do not create a new record if you have forgotten your username or password.

You will receive an e-mail with a link to authenticate your supplier account. The e-mail will come from ariesautomailer@dfid.gov.uk. (ARIES is the name of the DFID system which the DFID Portal links into). After authentication you should go to the DFID Portal welcome page where you can log on using the username and password you created.

Supplier/ Fund recipient registration

When you first register you will be asked to set up your company profile. The DFID Portal will guide you through the process. Any fields marked with a star are mandatory and will need to be completed before you can continue.

Click on [Your Profile](#) to start

Your record is split into seven sections and each of these is covered in more detail below. By clicking on next you will be guided through these sections.

Section	Description
General	General information about your Organisation including contact details and high-level financial data
Addresses	Addresses and Contacts from your company that will be able to use this system
Countries	Countries you wish to offer your goods or services to
Categories	Categories of goods, services or works your company offers
Questionnaires	Questionnaires you may be required to complete, based on the Categories you select
Other Docs	Other optional documentation about your Organisation such as brochures or catalogues
Financials	Banking and payment details

General

This where details of your organisation are held such as company registration number, if you have one.

Your DFID ID is the unique number which allows us to access your details. You should quote this number when communicating with DFID.

Business classification is a description of your organisation and more than one classification may be applicable.

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My Profile

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General Information

Mandatory fields denoted by * Clicking on Previous or Next will save your data first.

Organisation Information

Organisation Name:

Organisation registration number:

VAT registration number:

DUNS number (if applicable):

Your DFID ID:

Primary contact:

Country of registration:

Phone:

Fax:

Website:

Business Classification

Catalist Supplier

Company with 249 or less employees

Company with 250 or more employees

Government Department (UK)

Government Department (non UK)

Non Departmental Public Body

Not for Profit Organisation

Self employed Consultant

Select All Select None

Previous Next

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Addresses

This where you can add or amend your contact details. You can have multiple contact details, simply click on add.

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Addresses

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Use this page to record all your relevant addresses. You need to specify a main contact for each address. These contacts will also be able to log into and use this system. Click on Add to add an address. When you have finished, select Next.

Country	Address type	Name	Phone	Email	Active	
United Kingdom	General	DFID Portal	01355 84444		Yes	update
+ Add						

Previous Next

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To amend your contact details click on “[update](#)”. This allows you to amend contact names and addresses, phone and e-mail details and also to change your username and password.

[Receive Tender Alerts](#) – if you have this set to Yes then you will receive alerts when a tender for a published contract opportunity arises against one of the categories that you have set up in the categories section. This is covered below.

My Profile

Update Address Cancel Update

Clicking on Update will save your data.

Contact name & address	Phone & email
Title: Mr	Phone: 01355 84444
Firstname: DFID	Mobile:
Lastname: Portal	Fax:
Job title:	Email: ptk.1234@yahoo.co.uk
Address line 1: Abercrombie House	Confirm email: ptk.1234@yahoo.co.uk
Address line 2: Eaglesham Rd	Receive Tender Alerts?: Yes
Address line 3: East Kilbride	
Address line 4:	
Town: Glasgow	
County:	
Postcode: G74 8EA	
Country: United Kingdom	
Address Type: General	

Login details
Username: ofidportal
Security question: field of expertise
Security answer: international development
Login activated: Yes

Change password
Old Password:
New Password:

Cancel Update

Countries

This is the countries in which you either can or do operate. Simply click on add and you will get a list of countries.

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My Profile

Countries Previous Next

This page allows you to specify which Countries you operate in. Select Add to select the relevant Countries.

Country	Action
You have not currently selected any Countries	
Add	

Previous Next

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You can either select one, country, a number of countries or at the bottom of the screen there is a select all if your organisation operates globally. Click on Save to add the countries to your profile.

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Add Countries Cancel Save

Please tick the boxes of all the Countries your company wishes to offer goods or services to. When you have finished, select Save.

Afghanistan	<input checked="" type="checkbox"/>
Albania	<input checked="" type="checkbox"/>
Angola	<input checked="" type="checkbox"/>
Armenia	<input checked="" type="checkbox"/>
Azerbaijan	<input checked="" type="checkbox"/>
Bangladesh	<input checked="" type="checkbox"/>
Barbados	<input checked="" type="checkbox"/>
Belize	<input checked="" type="checkbox"/>
Bolivia	<input checked="" type="checkbox"/>
Bosnia and Herzegovina	<input checked="" type="checkbox"/>
Botswana	<input checked="" type="checkbox"/>
Brazil	<input checked="" type="checkbox"/>
Burma	<input checked="" type="checkbox"/>
Burundi	<input checked="" type="checkbox"/>
Cambodia	<input checked="" type="checkbox"/>
Cameroon	<input checked="" type="checkbox"/>
China	<input checked="" type="checkbox"/>
DRC	<input checked="" type="checkbox"/>
Ethiopia	<input checked="" type="checkbox"/>

Categories

Categories within DFID (also called products) are a means of identifying different areas of expertise or spend. If you are interested in bidding for DFID contract opportunities this is where you identify your areas of expertise.

If you are NOT interested in contract opportunities you still need to add at least one category. You should select one which is closest to the field in which your organisation operates.

Simply click on [Add](#)

The screenshot shows the 'My Profile' page with a 'Categories' section. The page title is 'My Profile' and the sub-section is 'Categories'. There are navigation arrows for 'Previous' and 'Next'. The main content area contains instructions: 'This page lists the Categories of goods or services your Organisation offers. To add a category select Add. Select Update against each Category to provide optional information including Referees your company would like to be considered for. Select Status to check the Category approval status that has been set by the DFID.' A note states: 'Please note: registering your profile on this system does not guarantee that you will be invited to tender at any time for that Category.' Below this, there is a search instruction: 'To view all the categories click on 'Add' then 'Search'. To limit the number of categories then type in a key word such as 'health'.' A table lists one category: 'PS70004 Mineral Extraction' with 'Description set' and 'Referees set' marked with a red 'X'. The 'Action' column has links for 'status | update | delete'. An 'Add' button is visible below the table. The left sidebar has a 'Progress' section with links for Start, General, Addresses, Countries, Categories (selected), Questionnaires, Other Docs, Financials, and Finish. A 'Links' section has Home, Help, and Logout. The footer includes '3.0 Patch 5 (release: 2010.11.26) Emergency Patch (2011.02.24)' and a 'W3C WAI-AA MCAG 2.0' logo.

You will get the search screen below. To view all categories leave the keyword blank and click on “[Search](#)”. To narrow down the search results enter keywords appropriate to your areas of expertise eg Health, Education, Governance etc.

Categories within DFID are split into different groups Programme (development) codes start with PS followed by five digits, Corporate ie services for DFID start with CS and Goods and equipment covering both programme and corporate begin with GE.

The screenshot shows the 'Add Category' search screen. The page title is 'My Profile' and the sub-section is 'Add Category'. There are 'Cancel' and 'Save' buttons in the top right. The main content area contains instructions: 'Search for Categories by entering a keyword and select Search. Put a tick against each Category you wish to add and select Save.' Below this is a search form with a 'Keyword' input field and a 'Search' button. Below the search form is a 'Search Results' section with a table header: 'Code Title'. Below the header is a message: 'Please use the search box above to search for required categories.' There are 'Cancel' and 'Save' buttons in the bottom right. The left sidebar is identical to the previous screenshot. The footer includes '3.0 Patch 5 (release: 2010.11.26) Emergency Patch (2011.02.24)' and a 'W3C WAI-AA MCAG 2.0' logo.

Whilst it is not mandatory to do so you can add more details against categories by clicking on update.

My Profile Update Category: PS70004 [Cancel](#) [Update](#)

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Detail Description

Category: PS70004 Mineral Extraction

Further details of the goods or services offered in the category may help us to identify you as a potential supplier in this category.

Detailed description:

Minimum Value

You will not be considered for tenders or requests for quotations (RFQs) for this category that are below the value you specify here.

Minimum limit (€):

Apply this value to all my

Referees

The organisations you have registered with may wish to follow up on references for this particular category. The names, addresses, and contact numbers of up to three Referees can be supplied below:

First referee:

Second referee:

Third referee:

Apply these referee details to all my existing categories:

Questionnaire

Where you have selected a category for which we require further information a questionnaire will appear on this page. You should download the questionnaire, complete and upload.

If no questionnaires appear then it means we do not require further information and you should click on next.

My Profile Questionnaires

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You may be required to complete one or more questionnaires depending on which categories you have selected.

To download a questionnaire, select the download link then save the document on your PC.

Questionnaire	Details of completed and attached questionnaire	Progress	Action
No questionnaires exist			

[Previous](#) [Next](#)



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Other Documents

If you wish to upload additional information please use this screen to do so.

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Other Documents ← Previous Next →

On this page you can optionally attach additional documentation such as your Organisation's brochure. When you have finished select Next

Title	Created on	Content type	Size	Action
No documents exist				
+ Add Document				

← Previous Next →

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privacy

Financials

As this screen is where you enter and update the details DFID will use for paying you it is important to ensure you have the correct information. Out of date or wrong information may lead to delays in payments

Most UK suppliers/ grant recipients will have details similar to the screen shot below ie payment will be made via BACS direct into you bank account. Whilst payment terms should be Net per 30 days DFID aims to pay valid invoices within 5 days.

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This page allows you to enter or amend your payment details. Please note that payment by cheque is only available to local suppliers paid by overseas offices. Please complete all appropriate information as failure to do so may result in delays in payments.

Account Details		Payment Details	
Bank name	DFID Portal Bank Account	Payment terms	Net per 30 days
Address line 1	The Bank	Payment method	BACS
Address line 2	1 The Street	Currency	GBP Pound Sterling
Address line 3			
Address line 4			
Town	AnyTown		
County			
Postcode	G74 8EA		
Sort code	112211		
Account number	12345678		
Building society ref			
IBAN	123456789		
Swift code	987654321		

If your bank account is outwith of the UK you should select “[sameday](#)” as the payment method. This does not mean you will receive payment on the same day but that when DFID obtains an exchange rate we will process on that day.

If you select the “[sameday](#)” payment method more boxes will appear setting out the additional information we require to process foreign currency or sterling abroad payments.

Completing your profile

When complete select finish.

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[My Profile](#)

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Please select Finish to complete the registration process and notify us of your new company profile. This will allow you then to register your interest in published tenders

You can return to update your company profile at any time. Please ensure it is kept up to date.

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Finish

Your profile has been successfully submitted. Select Home to return to the home page.

[Home](#)

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Home Page

After setting up your profile when you log in you start from your Home Page.

Your Profile

You can amend any of the areas in your profile

Bulletin Board

Similar to the Public Bulletin Board accessible from the DFID Portal Welcome Page but you can configure to your needs (covered below)

My tenders

Lists current tenders you are involved in (if any)

Payment Status

Shows details of current invoices being processed and payments made to your organisation (if any)



Links

Logout

Home Page

Please select from the options available below:

- [Your Profile](#) Update your profile (last updated on Sun 06 Mar 2011)
- [Bulletin Board](#) Search for opportunities to tender
- [My Tenders](#) Work on tenders you have already registered with (you are currently registered with 0 tender(s))
- [Payment Status](#) Check the payment status of invoices (you currently have no payment details to display)

Please note: registering your profile on this system does not guarantee that you will be invited to tender. The likelihood of being considered to tender for a contract will depend on the number of other companies registered on the system offering the same goods or services, and on the frequency with which the goods or services are procured.



Private Bulletin Board

This is similar to the Public Bulletin Board accessible from the DFID Portal Welcome Page. What is different is that you can search for contract/ tenders matching the categories in your profile. You can also search for current tenders where you can register an interest, this can be limited to matching categories in your profile or all.

The screenshot shows the DFID Private Bulletin Board search interface. At the top left is the DFID logo and 'Department for International Development'. The top right shows 'Welcome DFID Portal - DFID Portal' and 'Sun Mar 06 2011'. The main heading is 'Bulletin Board'. Below this is a 'Private Bulletin Board' section with instructions: 'Use the search criteria and select Search to retrieve a list of tendering opportunities. To obtain more details about a particular opportunity click on the contract title. (Results are ordered by deadline in ascending order)'. The search criteria form includes: 'Keyword or Contract ID' (text input), 'Country' (dropdown menu set to 'All'), 'Current / Awarded' (dropdown menu set to 'Current'), 'Matching categories' (dropdown menu set to 'In my profile'), and 'Display tenders' (dropdown menu set to 'I can register for'). A 'Search' button is located below the form. Below the search criteria is a 'Results' section showing '0 tenders found matching your criteria'. A table header is visible with columns: 'Tender', 'Stage', 'Country', 'Deadline', and 'Registered'. On the left side, there is a 'Links' menu with 'Home', 'Company Profile', 'Bulletin Board', 'My Tenders', 'Help', and 'Logout'. Below the links is a 'Key' section with five items: a green star (deadline more than a month away), a yellow star (deadline less than a month away), a red star (deadline less than a week away), a sad face (deadline has passed), and a neutral face (deadline not enforced). At the bottom right, there is a 'W3C WAI-AA WCAG 2.0' logo and version information: '3.0 Patch 5 (release: 2010.11.26) Emergency Patch (2011.02.24) privacy'.

Contacting DFID

This guidance together with the Frequently Asked Questions will provide all you require to use the DFID Portal. If you forget your username or password you should use the [forgotten password](#) link.

You should only need to contact DFID when the DFID Portal is not functioning correctly or the contact e-mail you have is not recognised by the DFID Portal. In these circumstances you should e-mail Query-DFIDPortal@dfid.gov.uk. You will receive an automated acknowledgement of your e-mail.

For all other enquiries please go to www.dfid.gov.uk/About-DFID/Contact-us