



Department
for International
Development



Registration

Supply Partner Portal User Guide

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Introduction

DFID has launched a new Supply Partner Portal. This is part of a wider release of a new internal eProcurement platform which will increase DFID's capability to conduct electronic procurement processes. The new platform is provided by Proactis and provides both DFID and Supply Partners with a much more intuitive user journey and richer functionality.

Registering on the new Supply Partner Portal allows your organisation to access and respond to DFID funding opportunities. The portal also allows you to create your organisation's profile which provides DFID with richer and more meaningful data about its supply base. Enabling DFID to improve its engagement and understanding of the supply base.

The Supply Partner Portal can be accessed from any computer with internet capabilities. Before you can access any customer pages you will first need to self-register your details on the Proactis system to create a username and password.

Important information about your account details

The Supply Partner Portal is a fully self-service platform and it is important that you always keep the details held within your profile up to date. It is your data and you are responsible for maintaining it, particularly when you experience staff changes. Failure to do so could result in access problems and missed tendering opportunities for your organisation.

The Supply Partner Portal will not permit the same email address to be used more than once for separate accounts, please ensure you use a unique e-mail address associated with each account.

Email Protocol

Please register under your organisation or company name and use your organisation's e-mail address where possible. Personal accounts can be used but please check your SPAM folder regularly to avoid missed opportunities. Central government email addresses cannot be accepted. Generic mailboxes can be used but be mindful of personal or potentially commercial information. If you forget your login details, you will need to use the "Cannot Access Account" on the Supplier Network login screen. You will be sent instructions on how to access your account.

Security

DFID has taken steps to ensure the DFID Supply Partner 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 the contact email is available only to people who have authority to view and amend the payment details we hold for you.

Use of Screen Shots

This guidance uses some views of the various screens within the DFID Supply Partner 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.

Supply Partner Portal Registration

Registration on the new Supply Partner Portal is a simple 3-stage process.

- A. Registration
- B. Activate your account
- C. Review and complete DFID Profile

Stage A – Registration

Access the Supply Partner Portal by clicking the following link: <https://dfid.proactisportal.com/> and click 'register'. You will then be asked to complete the following self-registration form:

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 *

Organisation Details

Organisation Name *

Property Name/Number *

Address 1 *

Address 2

Town *

County

Postcode *

Country *

Primary Correspondence Details

First Name *

Surname *

Telephone Number *

✓ Register

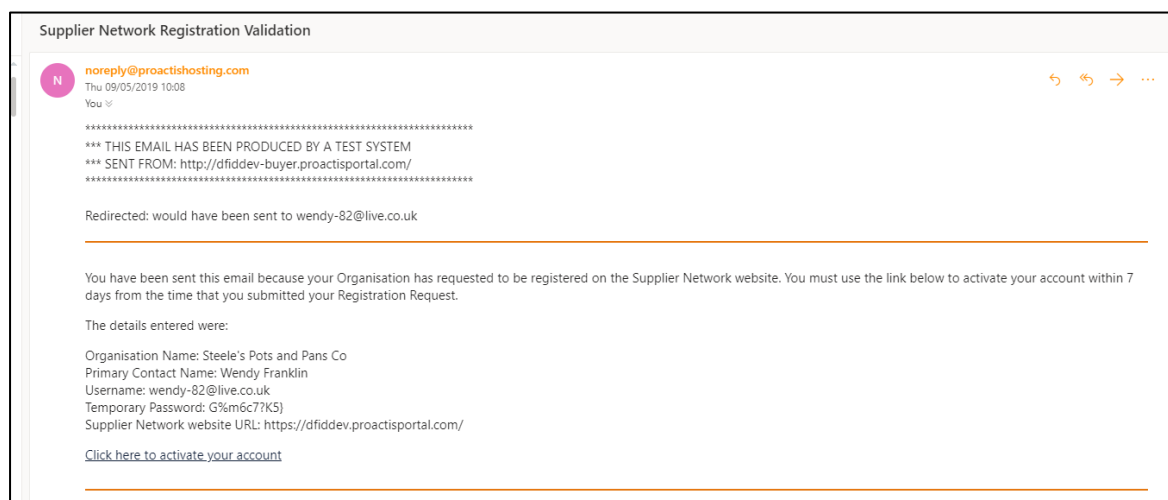
✗ Cancel

Once complete, click **register**.

Please note: If the details you submit are flagged by the portal as matching (or being very similar) to an existing account, then you will receive an on-screen prompt indicating there may be a duplicate account already registered. Check the list presented and if your organisation appears, then somebody within your organisation has already registered and will be able to add you to the existing organisation registration Alternatively, if you no longer have access to the registered account details (for example if the registered contact has left your organisation) you should contact DFID directly to arrange access via: supplierportalenquiries@dfid.gov.uk

Stage B: Activate Your Account

Subject to successful completion of stage I, you will receive the following email



Click the **link** provided in the email to validate your registration. You will then be required to complete some further details regarding your organisation.

Mandatory fields are denoted by *

Step I – Organisational details

Self Registration | Step 1 of 9

Save & Continue Later Back Next

1 2 3 4 5 6 7 8 9

Organisation Details

Organisation Name *
Steele's Pots and Pans Co

Registration Number ⓘ
Not Applicable

VAT Number ⓘ
Not Applicable

DUNS Number ⓘ
Not Applicable

Organisation Type * ⓘ

☐ a. Private sector supplier (includes Public, LLP's, partnerships)

☐ Self-employed consultant (SEC)

☐ NGO - non-governmental organization / Not for profit (include 'third sector' orgs)

☐ Multilateral or International Organisation

☐ Government Organisation (UK)

☐ International Government Organisation (Non UK)

☐ Other

Check you have completed all mandatory fields.

NB: You don't need to provide your VAT/DUNS number at this stage, however, we will need this should you ever bid on a DFID tender opportunity.

Press **Next** to proceed to next screen

Step 2. Organisation Address

Self Registration | Step 2 of 9

Department for International Development

Save & Continue Later Back Next

English (United Kingdom) Wendy Franklin Steele's Pots and Pans Co

1 2 3 4 5 6 7 8 9

Organisation Addresses

Address	Primary	Enabled	Action
2 Greystone Avenue, Stratthaven, ML10 6FL, UNITED KINGDOM	✓	✓	

+ Add Address

- Ensure you enter the registered UK address for your organisation (or of the country you are based in). This will be the address we use for any formal agreements that may be established as the result of a successful tender submission.
- To amend your details, click on the **Action** button and make the necessary changes.
- Click on **Next** to take you to the next screen

Please ensure any changes to your organisational address are reflected as soon as possible to ensure we have accurate information.

Step 3. Users

Self Registration | Step 3 of 9

Department for International Development

Save & Continue Later Back Next

English (United Kingdom) Wendy Franklin Steele's Pots and Pans Co

1 2 3 4 5 6 7 8 9

Organisation Users

Username	Full Name	Email Address	General Contact	e-Procurement Contact	Sales Contact	Payment Contact	Action
wendy-62@live.co.uk	Wendy Franklin	wendy-62@live.co.uk	✓	✓	✓	✓	

+ Add User

- Add users. You, as the person who has registered will automatically appear however if you want to add another user to the list you should click on Add User and complete the screen. An email with the link and user details will be sent to the added user upon completion of registration.
- Click on **Next** to move to next screen.

Please ensure that any changes to the Users are reflected as soon as possible to ensure we have accurate information and you don't miss out on any tendering opportunities.

Step 4. Products and Services

Self Registration | Step 4 of 9

Department for International Development

Save & Continue Later Back Next

English (United Kingdom) Wendy Franklin Steele's Pots and Pans Co

1 2 3 4 5 6 7 8 9

By telling us which products and services you provide, you'll make it easier for potential customers to find you and ensure you'll receive tender opportunities that are of most relevance to your organisation.

The left panel below shows the products/services that are available. The right panel shows those that you've added. Navigate the tree on the left to browse for products/services and tick the check box next to any that are relevant. After this, use the circular right arrow button in the middle to move the selected classifications across to the right panel. If you make a mistake, you can remove classifications by ticking the check boxes next to any unwanted products/services in the right panel, then using the circular left arrow button. If you want to completely start again, use the reset button. When the right panel contains the products/services you want, you're ready to proceed to the next step.


Type some key words here describing what you sell...

Available

- ☐ CLIMANDEV: Climate and Environment
- ☐ ECODEV: Economic Development
- ☐ EDEDUCAT: Economic Development - Education
- ☐ EDOVERNA: Economic Development - Governance and Security
- ☐ GLOBALPART: Global Partnerships
- ☐ GOVANDSEC: Governance and Security
- ☐ HUMANDEV: Human Development
- ☒ HUMANITARIAN: Humanitarian
 - ☐ HUMIRECT: Humanitarian - Direct response
- ☒ HUMOTHER: Humanitarian - Other
 - ☐ 73010: Reconstruction Relief and Rehabilitation
 - ☒ 74010: Disaster Prevention and Preparedness
 - ☐ 89010: Humanitarian Research

Added

- ☒ HUMANITARIAN: Humanitarian
- ☒ HUMOTHER: Humanitarian - Other
- ☐ 74010: Disaster Prevention and Preparedness

- Click on area you wish to select. Dependent on what you select you may be given a further dropdown to narrow/define your selection.
- Once you have found correct product/service click on the  to move your selection to the right-hand side of the screen. Please use lowest level description that is most appropriate when making your selection.
- Repeat until you have defined all your products services
- Click **Next** to move to next screen

Step 5 – Buyer Organisation

Please ensure you follow the instructions under this step carefully. Failure to do so may cause delay in accessing your account and/or the processing of any payments.

Self Registration | Step 5 of 9

Department for International Development

Save & Continue Later Back Next

English (United Kingdom) Wendy Franklin Steele's Pots and Pans Co

1 2 3 4 5 6 7 8 9

Select Buyer Organisations

Title	Town	Post Code	County	Country	
Department for International Development (DFID)	East Kilbride	G75 8EA		UNITED KINGDOM	<input type="checkbox"/>

This Portal has been developed for the use of DFID only. To use DFID's Supply Partner Portal, you must always select DFID as the Buyer Organisation. If you don't select this, we will not pick up your details for our supplier portal.

- Click on the box to select DFID and then **Next**

Step 6. – Primary Contact Details

Self Registration | Step 6 of 9

Department for International Development

Save & Continue Later Back Next

English (United Kingdom)

Wendy Franklin
Steele's Pots and Pans Co

1 2 3 4 5 6 7 8 9

Primary Contact Details

Organisation Name
Steele's Pots and Pans Co

Email Address *
wendy-62@live.co.uk

First Name *
Wendy

Surname *
Franklin

Telephone Number *
013558433702

- Check details are correct; amend as necessary
- Click **Next** to move to next screen

The Primary Contact is the person who has registered on the Supplier Portal. You can only have one primary contact.

Please ensure that any changes to the Primary Contact are reflected as soon as possible to ensure we have accurate information and you don't miss out on any tendering opportunities

Once your account has been created it is possible to give users Administration access to your organisation's account. To change the Primary contact; ie if the person is leaving the organisation, a user with administration access will need to add a contact and make them the Primary Contact. The new Primary contact will then need to delete the original Primary Contact.

Step 7. Notifications

Self Registration | Step 7 of 9

Department for International Development

Save & Continue Later Back Next

English (United Kingdom)

Wendy Franklin
Steele's Pots and Pans Co

1 2 3 4 5 6 7 8 9

Notification Details

This is the full list of email notifications and they are all enabled at present. You can select/deselect whichever ones you require. Ongoing changes can be made via the Preferences tab under Your Business

☒ Select/Unselect all options here.

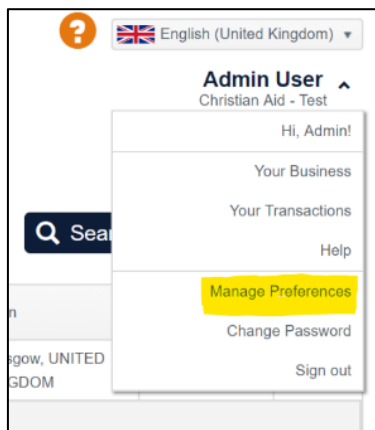
Notification Subscriptions

- ☒ Notification of new Buyer Dialogue on an Assessment
- ☒ Notification of being assigned to Issue for an Assessment
- ☒ Notification of Update to an Issue for Assessment
- ☒ Notifications of new Buyer Dialogue in Contracts
- ☒ Reminders sent to Suppliers when their Documents are nearing their expiry
- ☒ Notifications of new Buyer Dialogue in Opportunities
- ☒ Notification of new Buyer Dialogue in Sourcing Requests
- ☒ Supplier notifications for amendments to RFX Request Documents
- ☒ Notifications of tender closing date changes
- ☒ e-Sourcing project participation status change notifications
- ☒ Questionnaire Completion Requests

This is the full list of email notifications and they are all enabled at present.

- You can select/deselect whichever ones you require.
- Click **Next** to move to next screen

Further changes can be made under the Preferences tab under “Your Business”.



Step 8 – Proactis Terms of Use

Department for International Development

Self Registration | Step 8 of 9

Save & Continue Later Back Next

English (United Kingdom)

Wendy Franklin
Steele's Pots and Pans Co

1

2

3

4

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7

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9

Proactis Terms of Use

PROACTIS LIMITED

USER LICENCE

YOU MUST READ THE FOLLOWING BEFORE CONTINUING

The use of the software provided by Proactis Limited is subject to the following User Licence. You must carefully read through the User Licence. By accepting the License, you confirm that you have read the User Licence and that you agree to be bound by the terms and conditions of the User Licence at all times. If you are accepting the User Licence on behalf of a firm or corporate entity you warrant that you have the authority to do so.

If you do not agree to be bound by the User Licence you will not be able to activate and use the Software.

1. Definitions and INTERPRETATION

In the User Licence unless the context requires otherwise:

Charges means the charges payable by the Client under the Client Agreement for the Services;

Client means the party who has entered into an agreement with Proactis for the provision of the Services or a Supplier to the Client who has been invited to use the Services for the Client's benefit;

Client Agreement means the agreement entered into between Proactis and the Client for the provision of the Services;

Client Support Service means the email support facility made available to You by Proactis for the duration of the Service Period;

Community means all Users;

Confidential Information means information of a confidential nature belonging to either You or Proactis which may come to the notice of the other during the Service Period, and in respect of Proactis includes (without limitation) any information relating to the Software or other technologies and products of Proactis used to provide the Services;

Information means the information entered into any registration form(s) relating to the Services including but not limited to name, postal or e-mail address, username, password and computer system settings;

IPR means intellectual property rights, including but not limited to copyright, patents, trademarks, service marks, design right, format rights, look and feel, know how, confidential information, moral rights, rights of privacy or publicity, domain names and any other intellectual or industrial property rights (whether registered, registrable or not and including any applications to register the same) wherever in the world enforceable, including any renewals of registrations of the same;

Licence means a personal, non-exclusive, non-transferable, royalty-free licence to use the Software in accordance with the User Licence and any special licence terms as may be applicable to particular parts of the Software which will be notified to you from time to time;

Minimum Requirements means the minimum system requirements required to run the Software (as may be varied or updated from time to time), which are set out on the Web Site.

Please read and accept or decline the Terms and Conditions for registration onto the Proactis Supplier Network. Kindly note, if you decline your registration cannot be progressed.

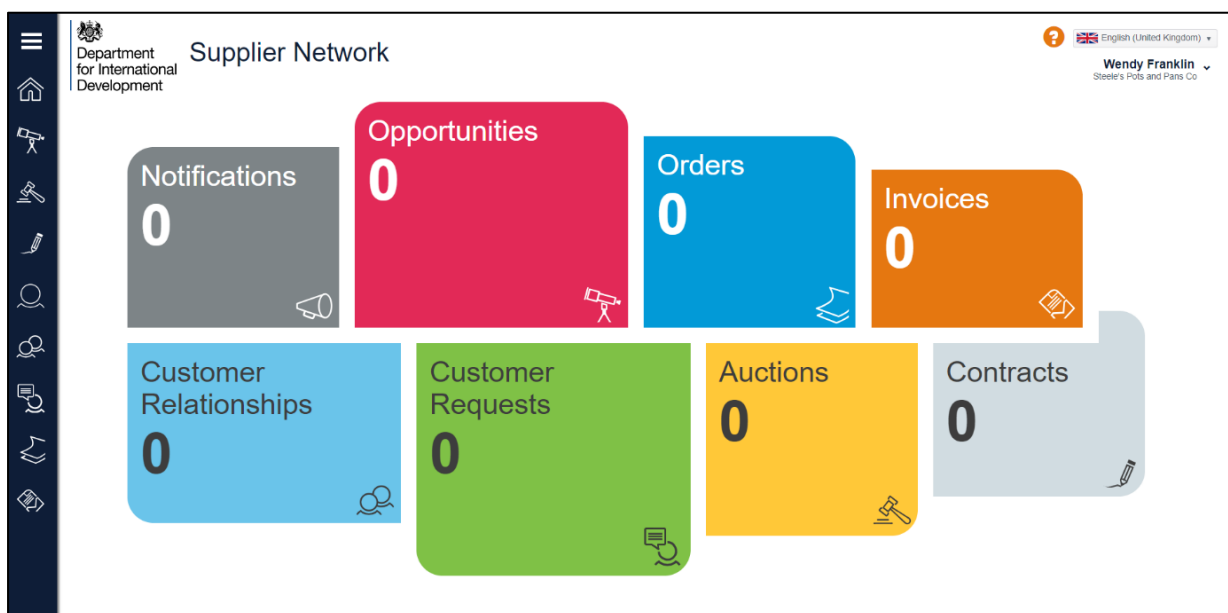
Access to and use of the DFID Supply Partner Portal, provided by Proactis, is absolutely free of charge for suppliers. There are **no costs** associated with completing the registration or using the portal.

Step 9 – Your Login Details

The screenshot shows the 'Self Registration | Step 9 of 9' form for the Department for International Development. The form includes a progress bar with steps 1 through 9, where step 9 is highlighted. The form fields are: Organisation Name (Steel's Pots and Pans Co), Username (wendy-42@live.co.uk), New Password (with a strength indicator), and Repeat Password. Navigation buttons include 'Save & Continue Later', 'Back', and 'Next'. A 'Complete Registration' button is at the bottom right. The user's name 'Wendy Franklin' and company 'Steel's Pots and Pans Co' are displayed in the top right corner.


- Please enter a password, then repeat in the second box for confirmation
- Click Complete Registration

Once you have clicked Complete Registration you should be taken to the Supplier Network Portal

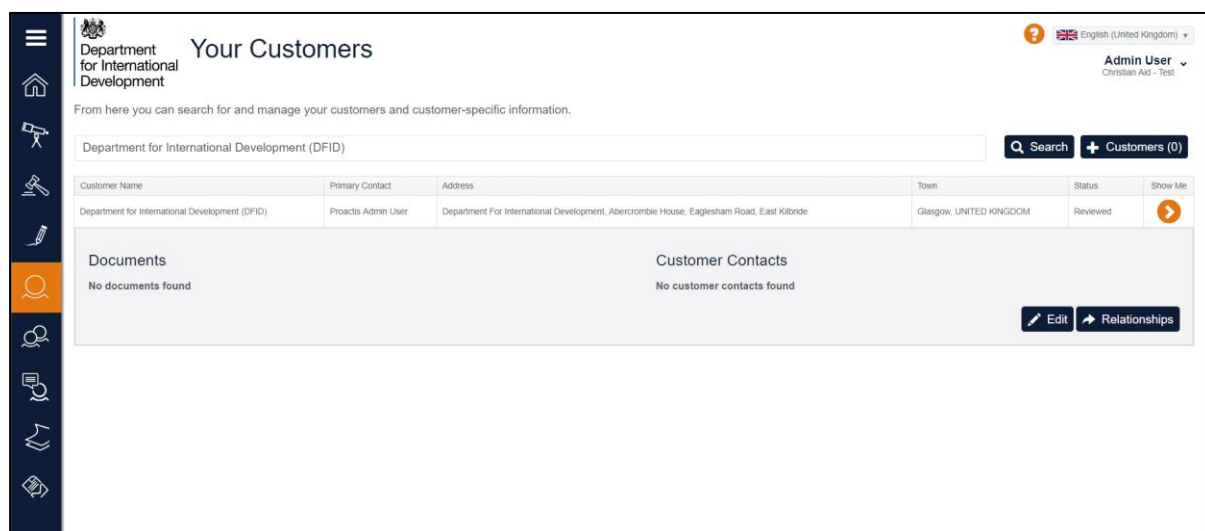


Stage C – Complete DFID Profile

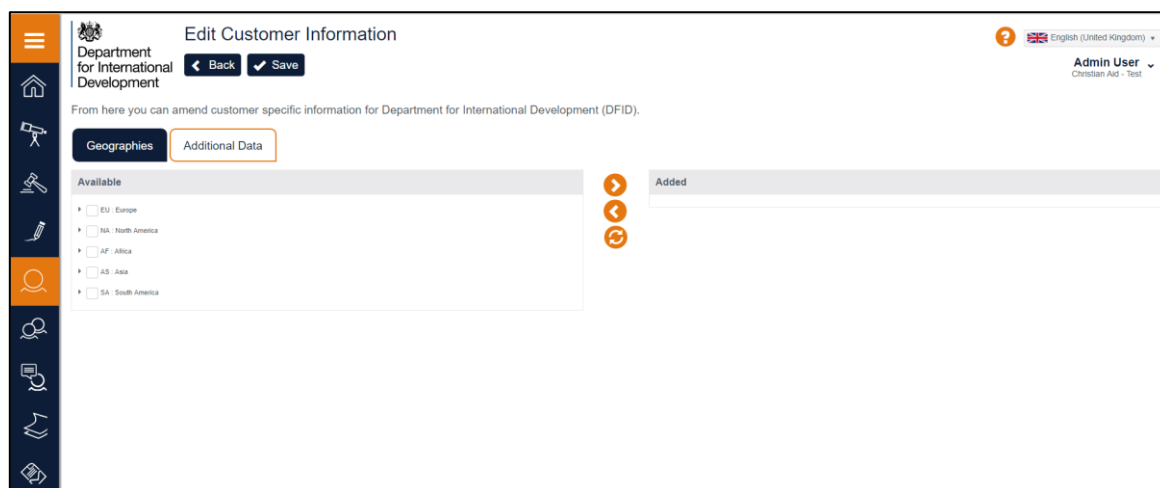
Once you have successfully created your record there are some more fields we would like you to complete to help ensure you receive all relevant opportunities.


Click on the  button on the left-hand side of the screen.

You will be directed to the screen below. As previously mentioned, DFID is the only “Customer” on the Supply Partner Portal. Click, on the **Edit** button. If you do not have the **Edit** option as shown below, click on the **+ Customers** option near the top of the page and add DFID.



You will need to select the specific geographical areas you are interested in or able to work in.



- Click on area you wish to select. Dependent on what you select you may be given a further dropdown to narrow/define your selection.
- Once you have found correct geographical area click on the  to move your selection to the right-hand side of the screen.
- Repeat until you have defined all relevant areas
- Click **Save** and then **Additional Data** to move to next screen

Edit Customer Information

Department for International Development

From here you can amend customer specific information for Department for International Development (DFID).

Geographies | **Additional Data**

Additional Data

Organisation:

Balance Sheet Total: *

Headcount: *

Turnover: *

Website:

International Aid Transparency Initiative (IATI) details:

For information regarding registering with IATI please follow the link below:
<https://atstandards.org/transparent-standard/>

IATI Reference No:

Segmentation Type: *

DAC Code:

Name on Account:

Name of Bank:

Address Line 1:

Address Line 2:

Address Line 3:

Address Line 4:

Town/City:

County/State:

Postcode:

Please complete the details as much as you can at this stage, including the appropriate banking information in order to facilitate payments (if appropriate).

If you are registering in order to facilitate payment from DFID, please notify the appropriate DFID budget holder at this stage that you have successfully completed the registration process and entered the appropriate banking information.