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.

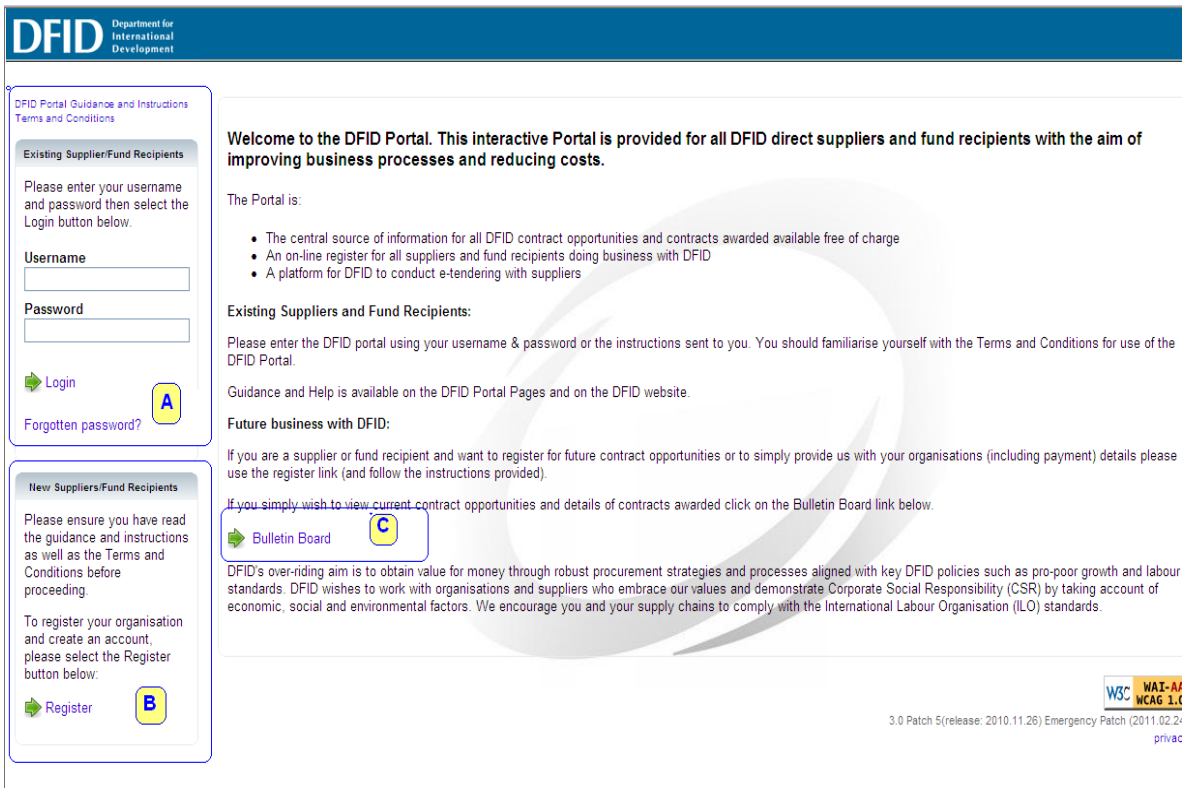
DFID has taken steps to ensure the DFID Portal is secure and that your bank and any other commercially sensitive information are protected. However, you do have a responsibility to ensure your username and password are safeguarded and that your contact e-mail is available only to people who have authority 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.

- DFID Portal Welcome Page
- Log-in for existing suppliers and grant recipients
- Registering for new suppliers/ grant recipients
- Viewing details of DFID contract opportunities and contracts awarded (Public Bulletin Board)
- Forgotten password/ user names
- Terms and Conditions for use of the DFID Portal
- Supplier/ Grant Recipients profile
    - General
    - Address (including registering for tenders and changing username and password
    - Countries

    - Categories
    - Questionnaires
    - Other Documents
    - Financial (including payment details)
    - Profile Home page
- Profile Home page
    - Amending profile
    - Private Bulletin board
    - Tenders I am involved in
    - Payments made or being processed

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



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

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

B — is where new suppliers and fund recipients register

C — 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.

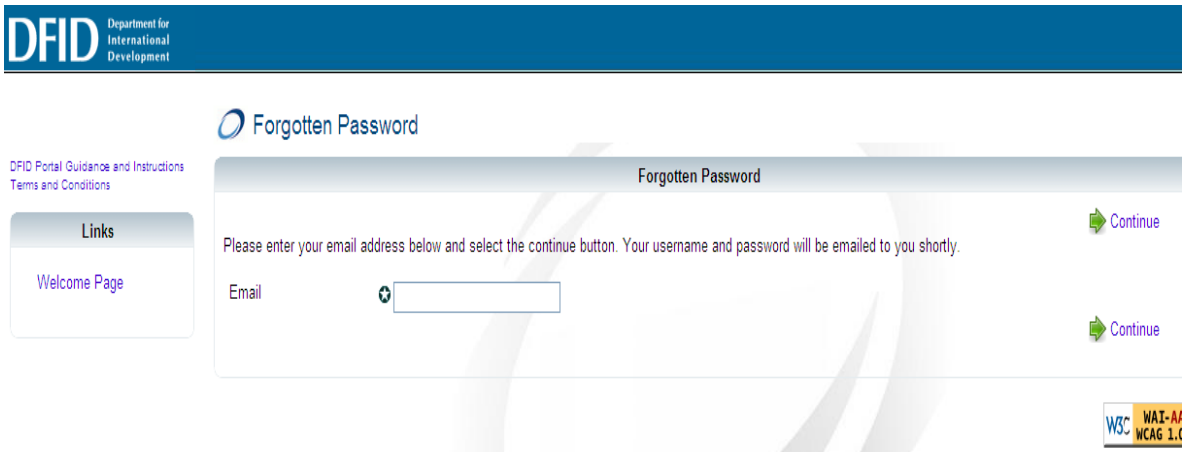
Existing Suppliers/ Fund Recipients

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

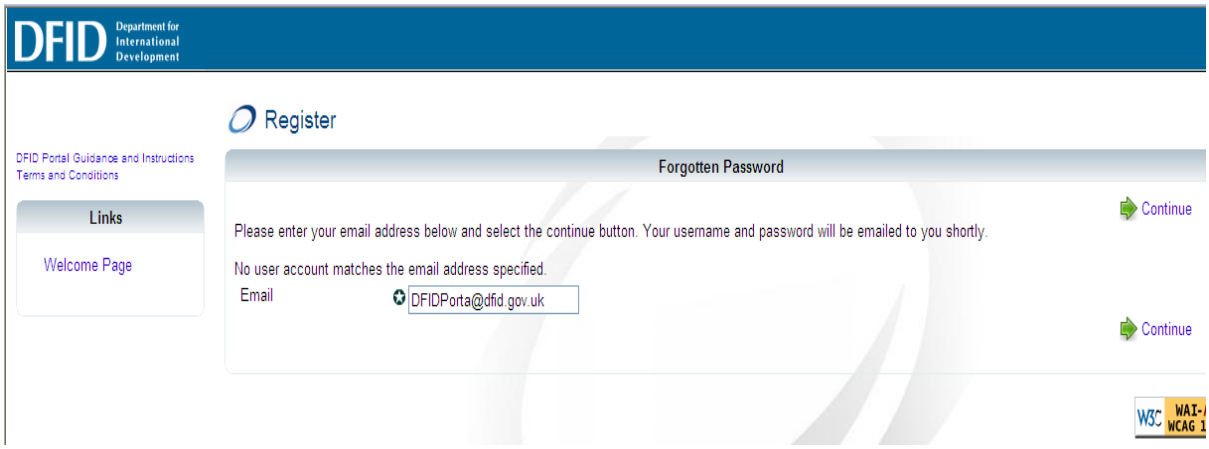
If you have forgotten your username or password you should use the forgotten password link. This will bring you to the page below where you should enter your e-mail address in the box. If the contact e-mail address that DFID holds agrees with

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



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.



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.

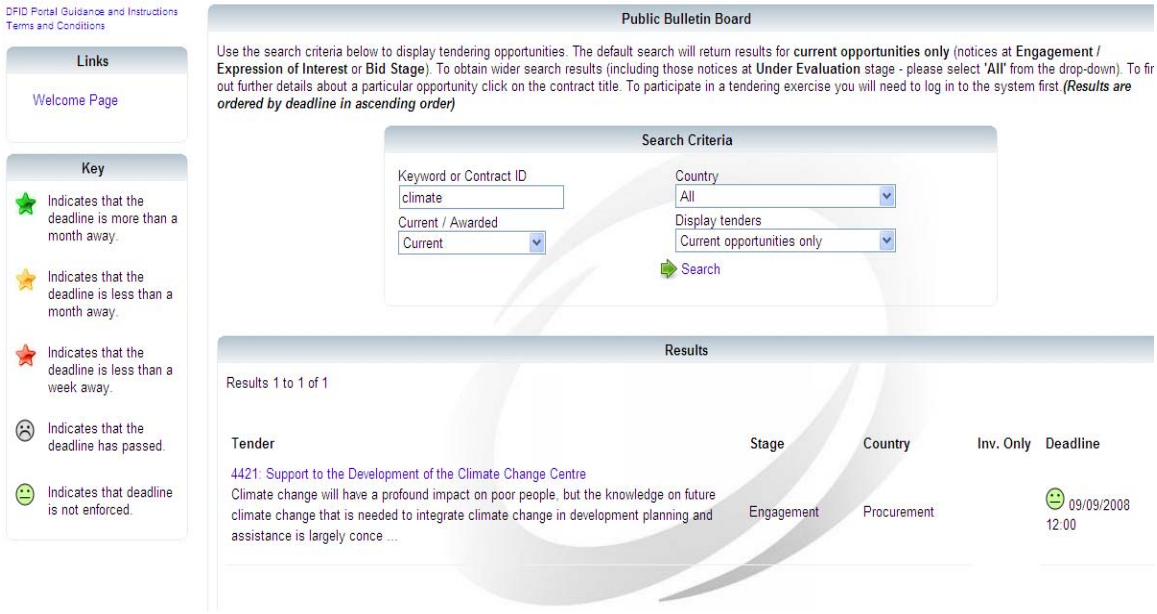
Bulletin Board

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.



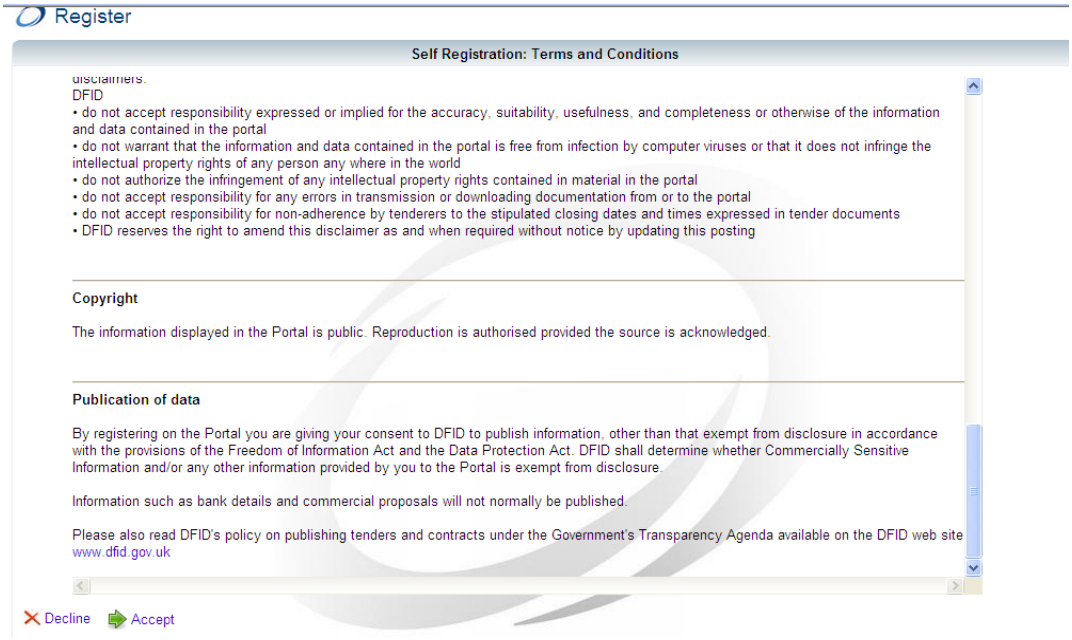
To obtain more details, including registering your interest, click on the blue title. To register an interest you will need to be registered on the DFID Portal. Registered users have a private bulletin board which can be set up to show tender opportunities that fit in with their profile

New Suppliers & Fund Recipients

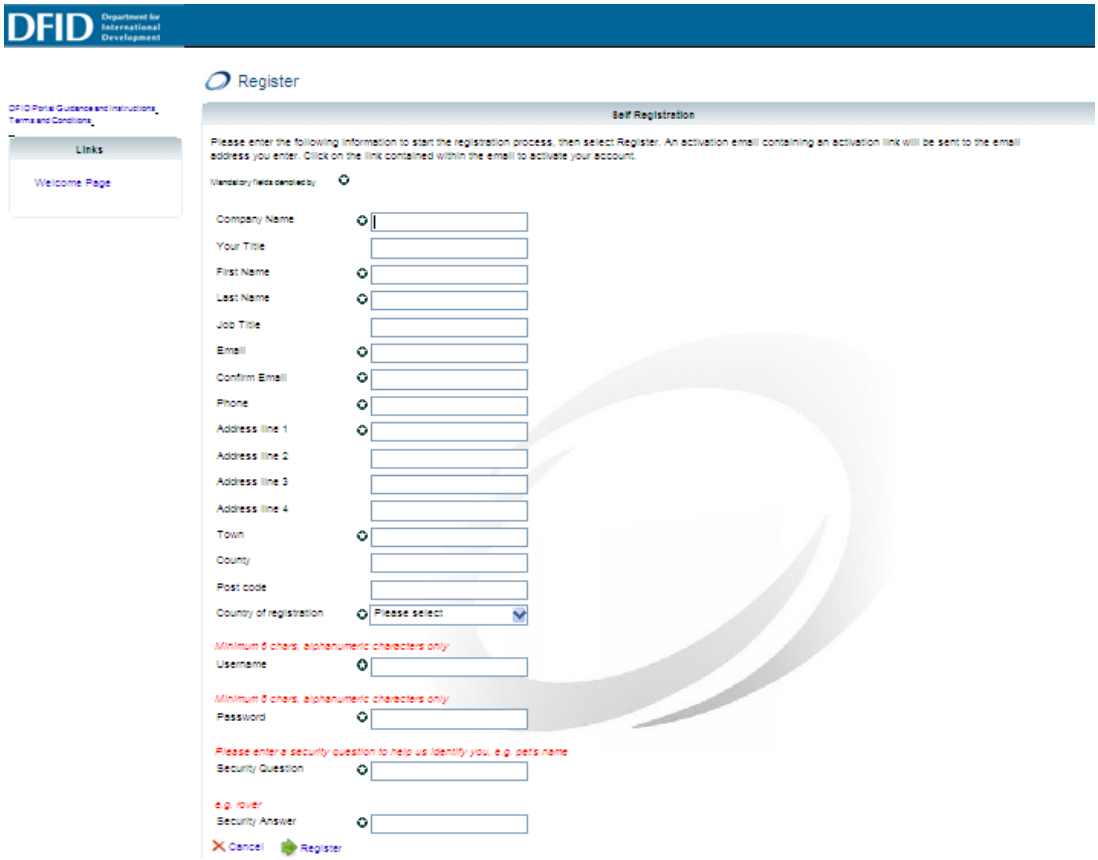
If you are interested in bidding for DFID contract opportunities or have been instructed by a DFID official to enter your payment details you must register on the DFID Portal. From the DFID Portal login page click on the Register icon.

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”.



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.



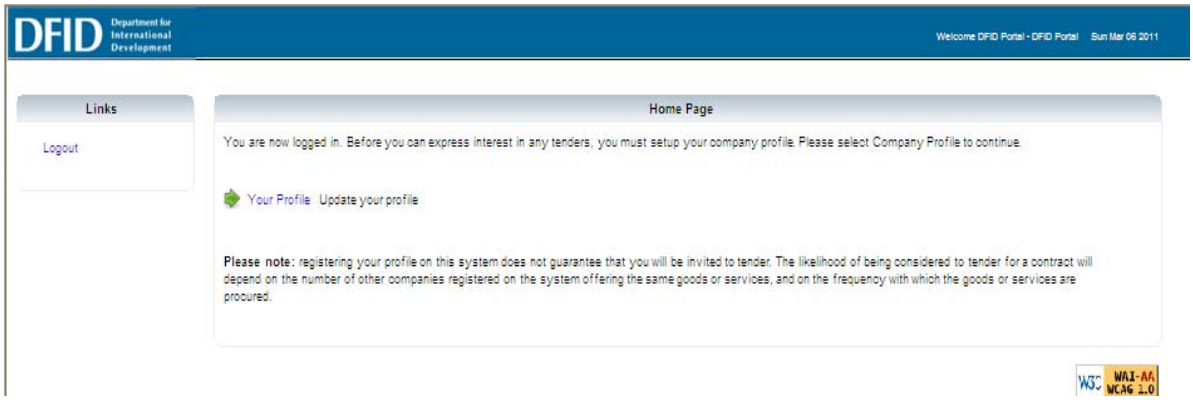
If there is already a record, or very similar, the DFID Portal will inform you. If your organisation already has a record you should log on using those details (the section on Existing Suppliers/ fund recipients covers this including where you have forgotten your username and password). Do not create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

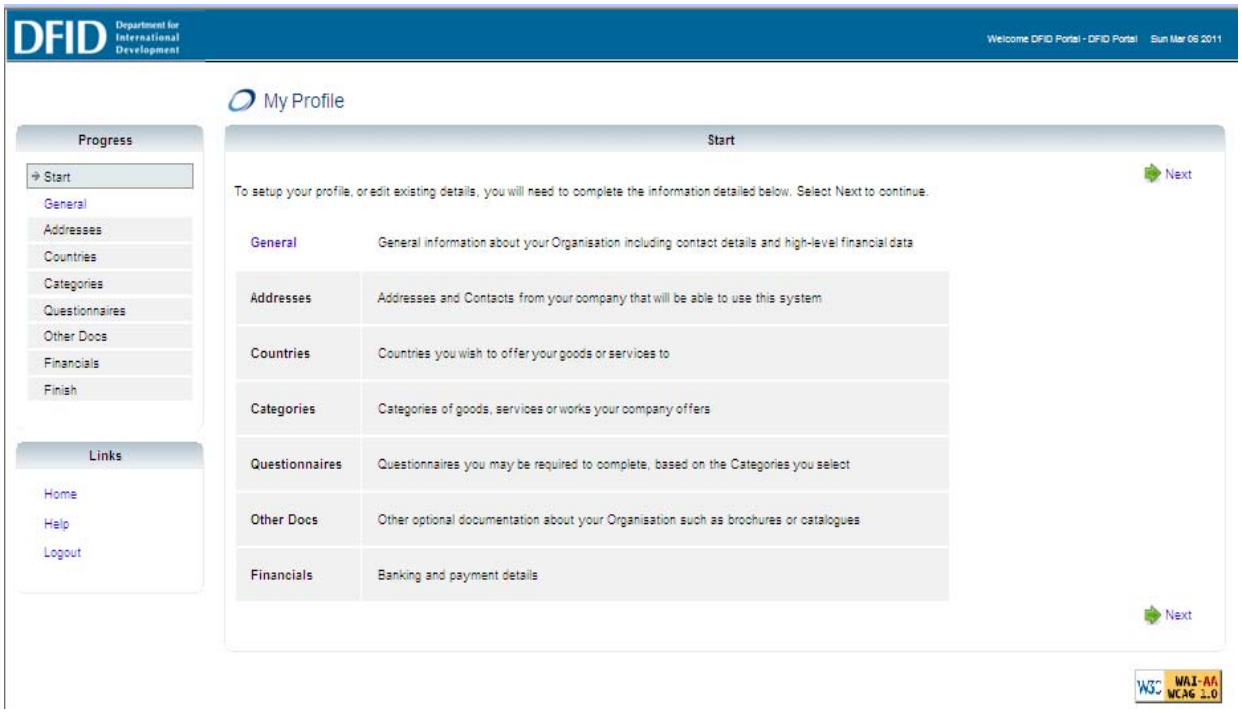
Supplier/ Fund recipient registration

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.

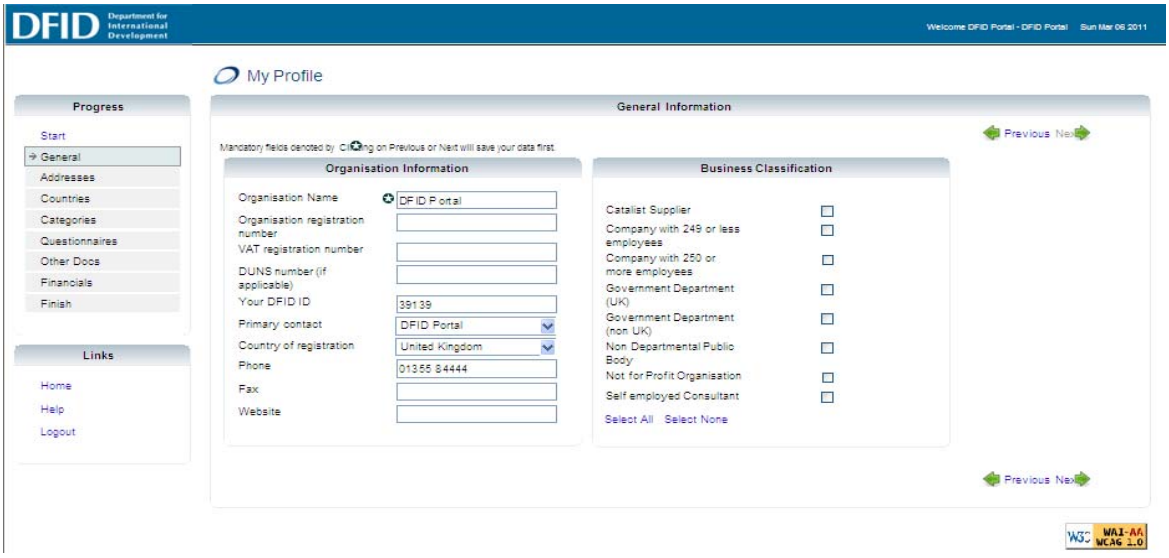


General

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

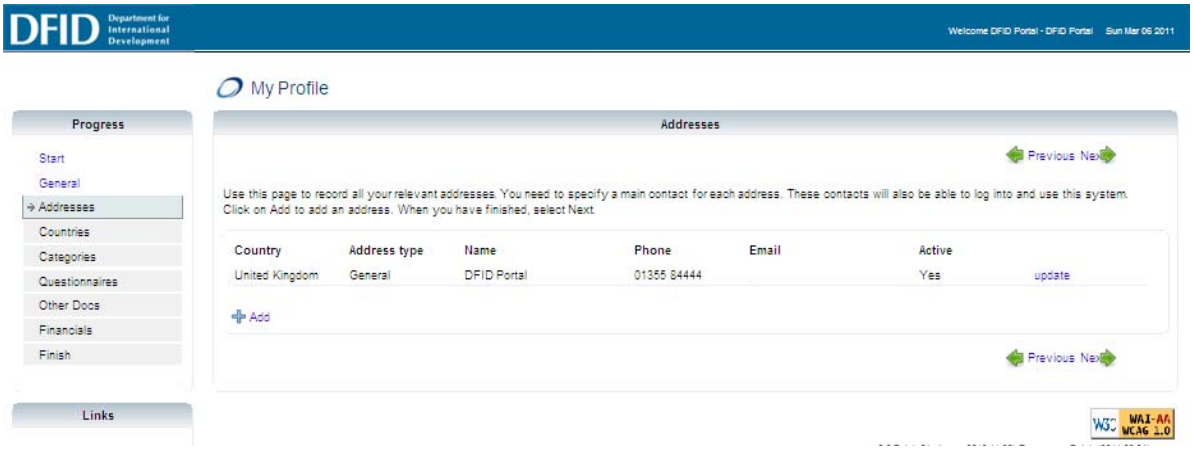
Your DFID ID is the unique number which allows us to access your details. You should quote this number when communicating with DFID.

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



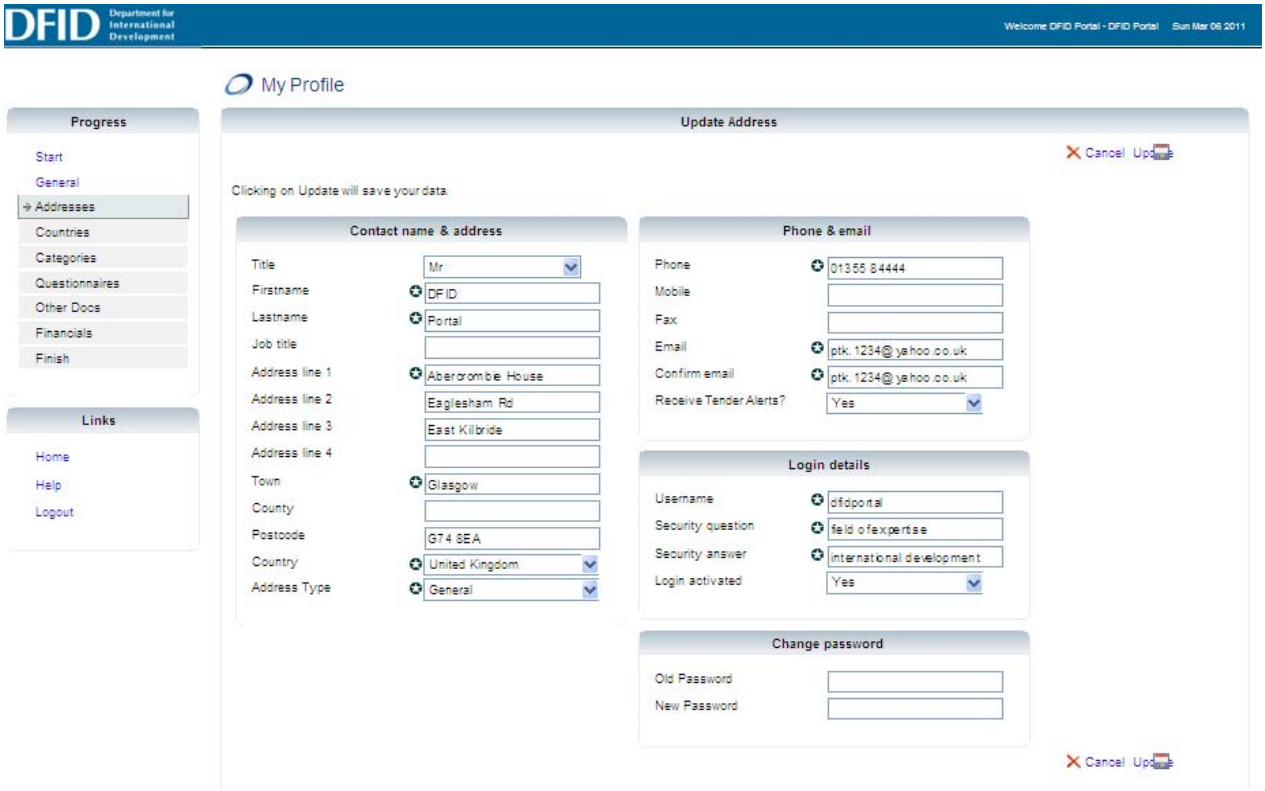
Addresses

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



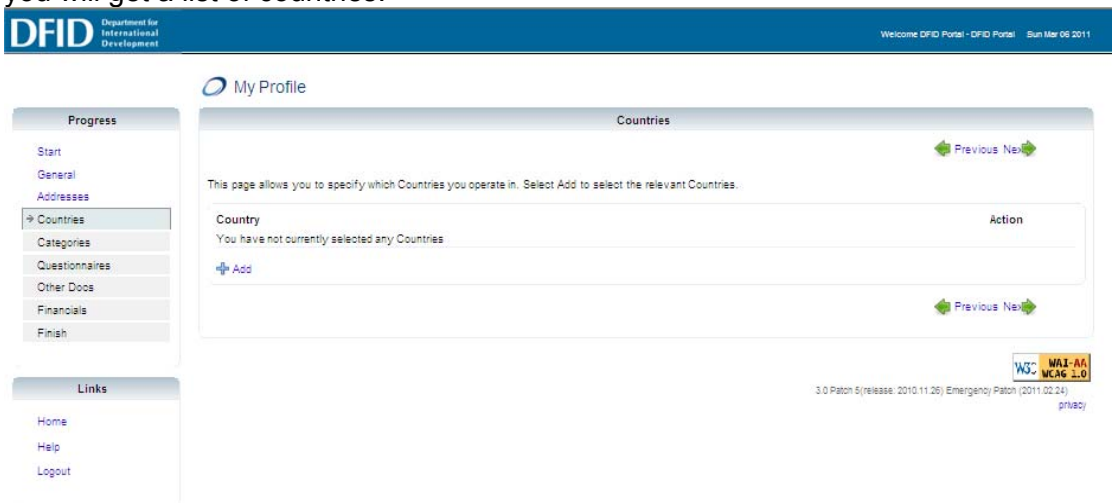
To amend your contact details click on “update”. This allows you to amend contact names and addresses, phone and e-mail details and also to change your username and password.

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.

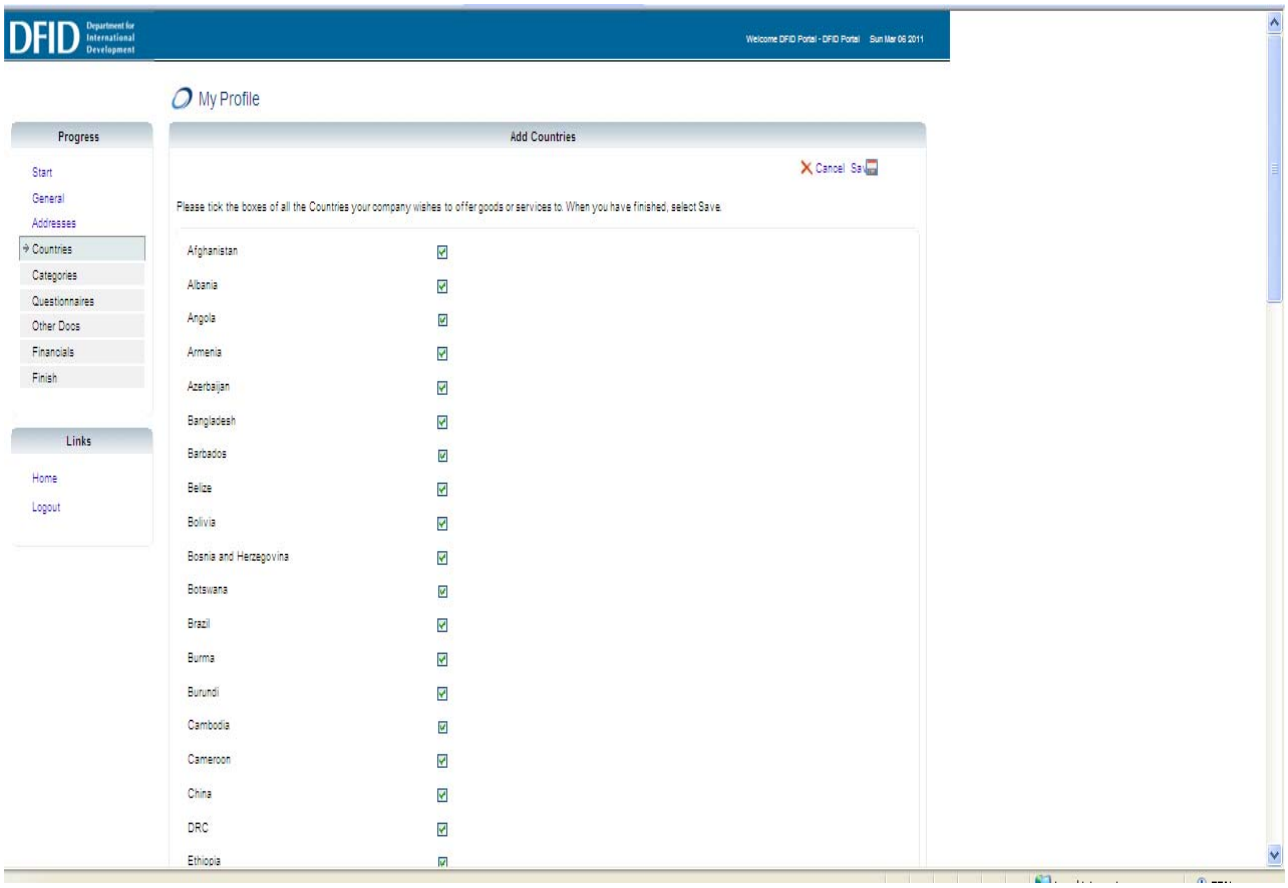


Countries

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



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.


DFID
Department for International Development
Welcome DFID Portal - DFID Portal Sun Mar 06 2011
My Profile
Progress
Start
General
Addresses
Countries
Categories
Questionnaires
Other Docs
Financials
Finish
Links
Home
Logout
Add Countries
Cancel Sa
Please tick the boxes of all the Countries your company wishes to offer goods or services to. When you have finished, select Save.
Afghanistan
Albania
Angola
Armenia
Azerbaijan
Bangladesh
Barbados
Belize
Bolivia
Bosnia and Herzegovina
Botswana
Brazil
Burma
Burundi
Cambodia
Cameroon
China
DRC
Ethiopia

Categories

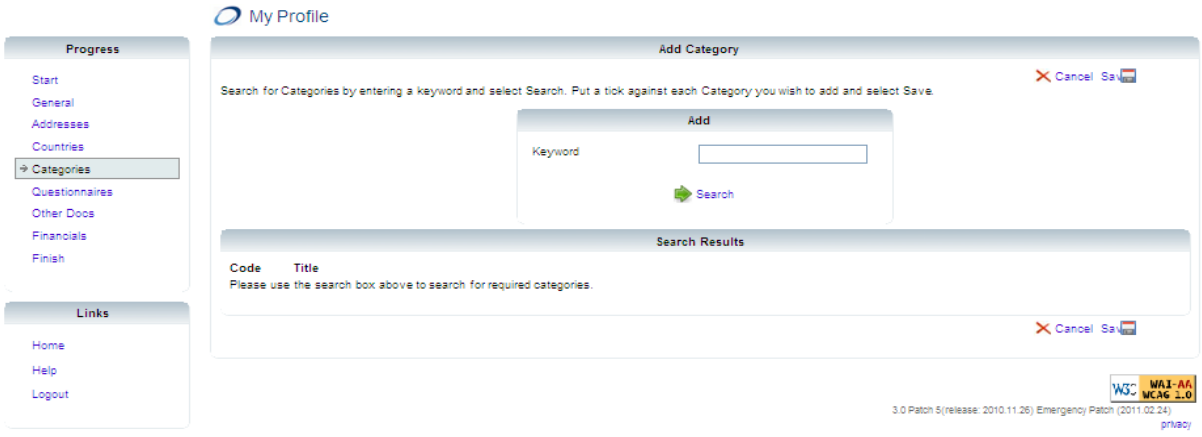
Categories within DFID (also called products) are a means of identifying different areas of expertise or spend. If you are interested in bidding for DFID contract opportunities this is where you identify your areas of expertise.

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.

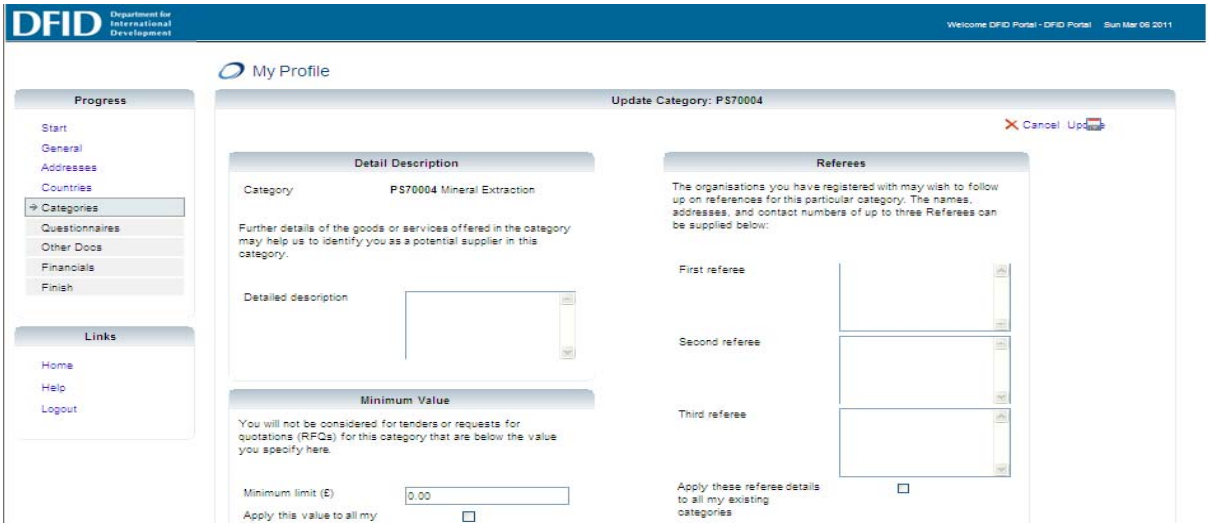
Simply click on Add

You will get the search screen below. To view all categories leave the keyword box 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.



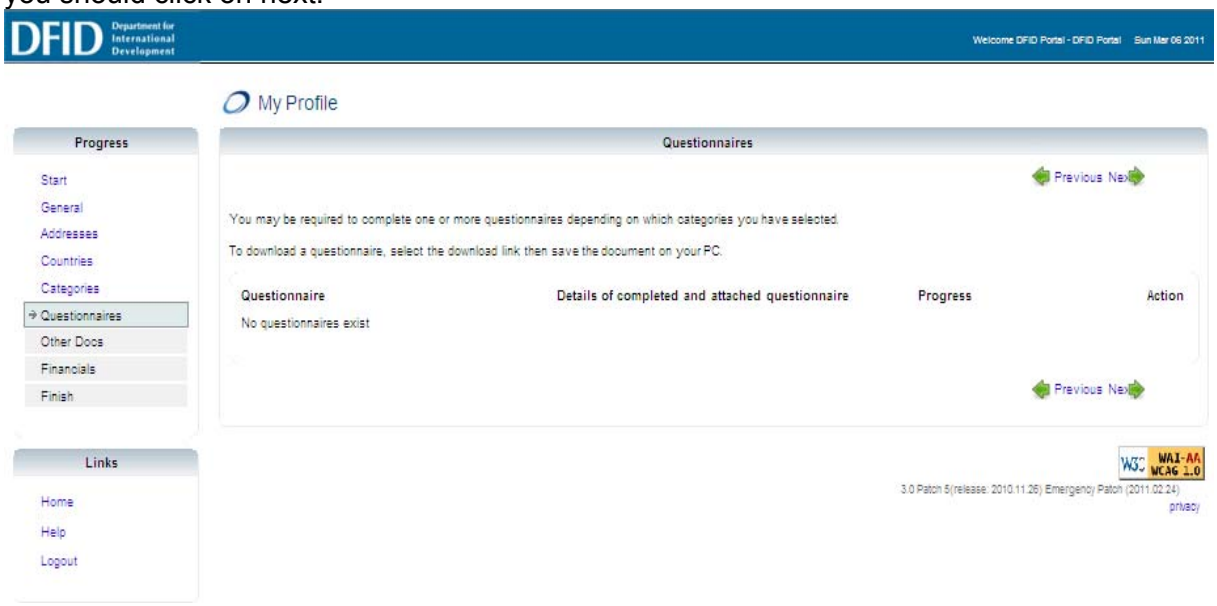
Whilst it is not mandatory to do so you can add more details against categories by clicking on update.



Questionnaire

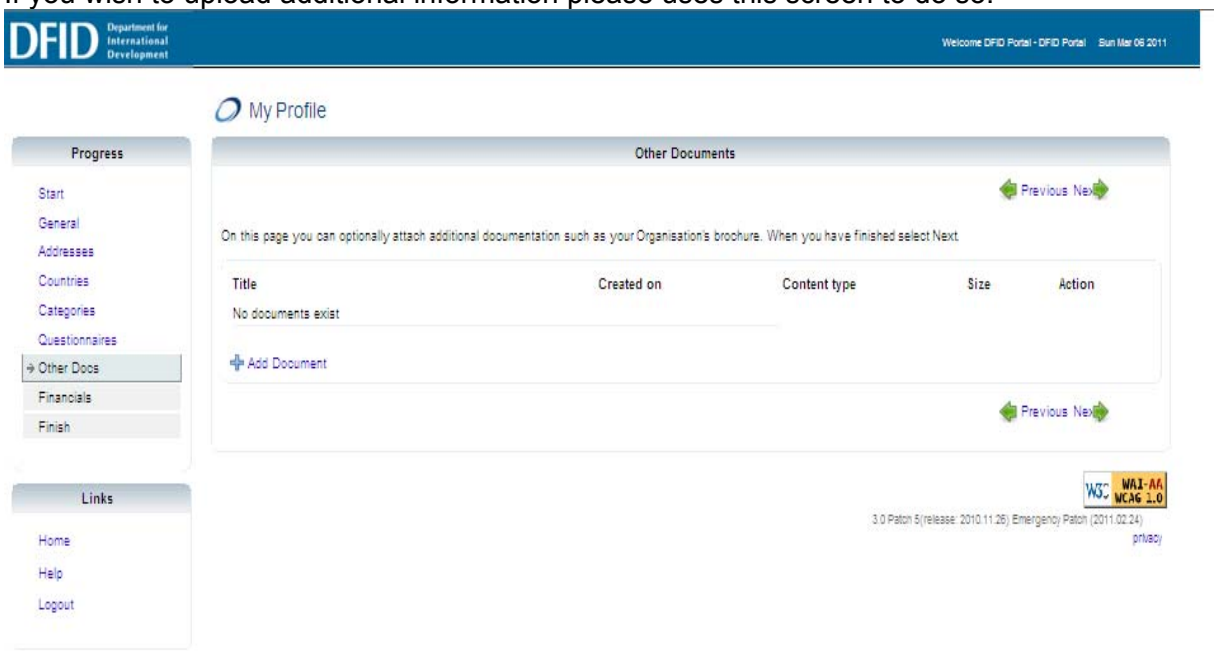
Where you have selected a category for which we require further information a questionnaire will appear on this page. You should download the questionnaire, complete and upload.

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



Other Documents

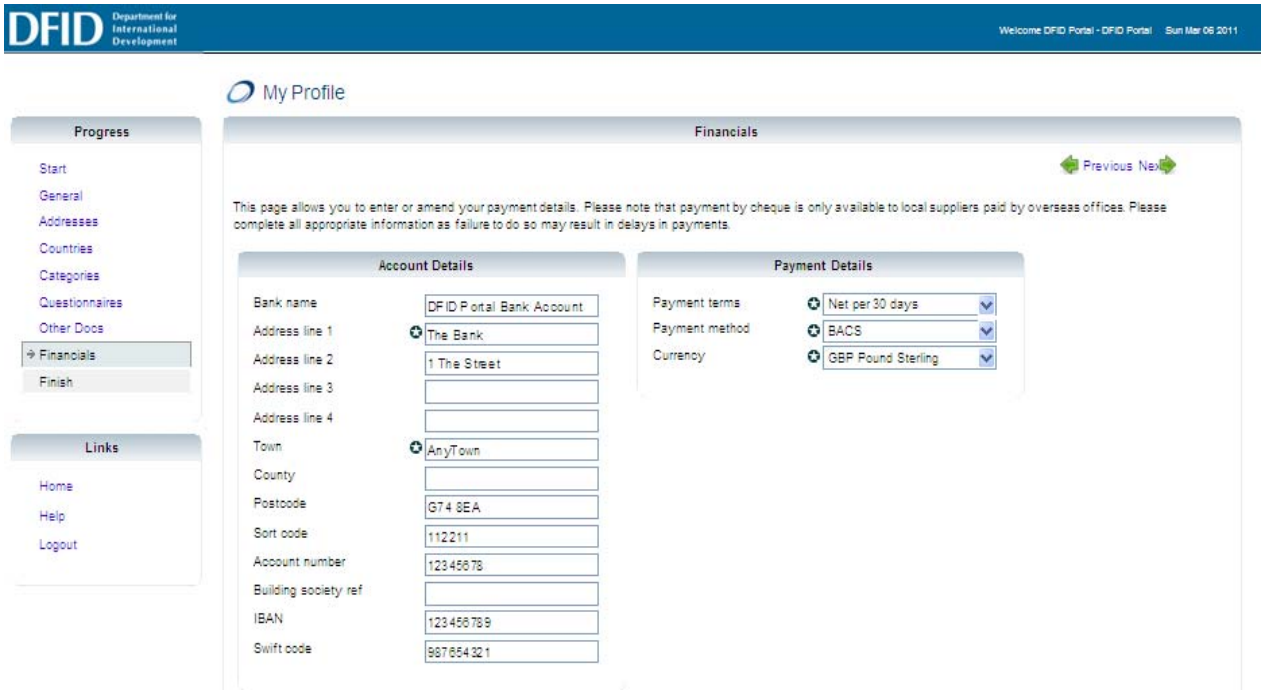
If you wish to upload additional information please uses this screen to do so.



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.

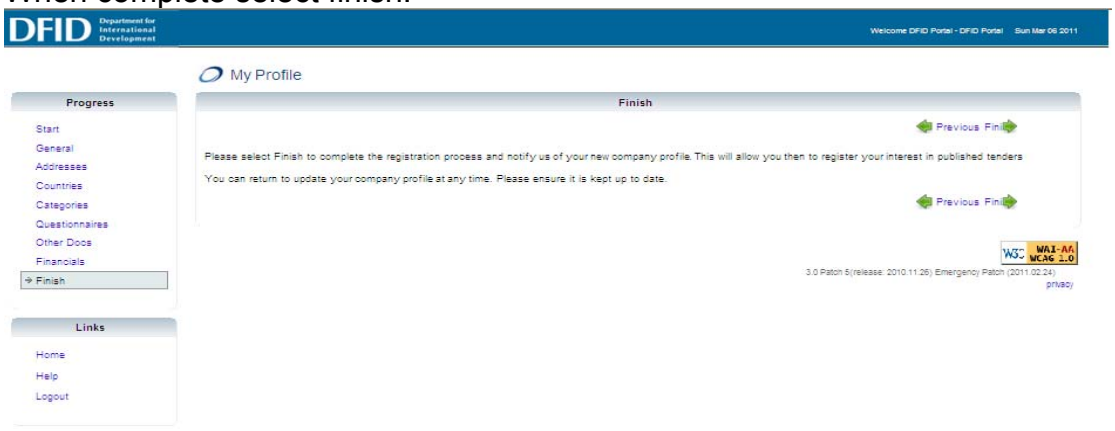


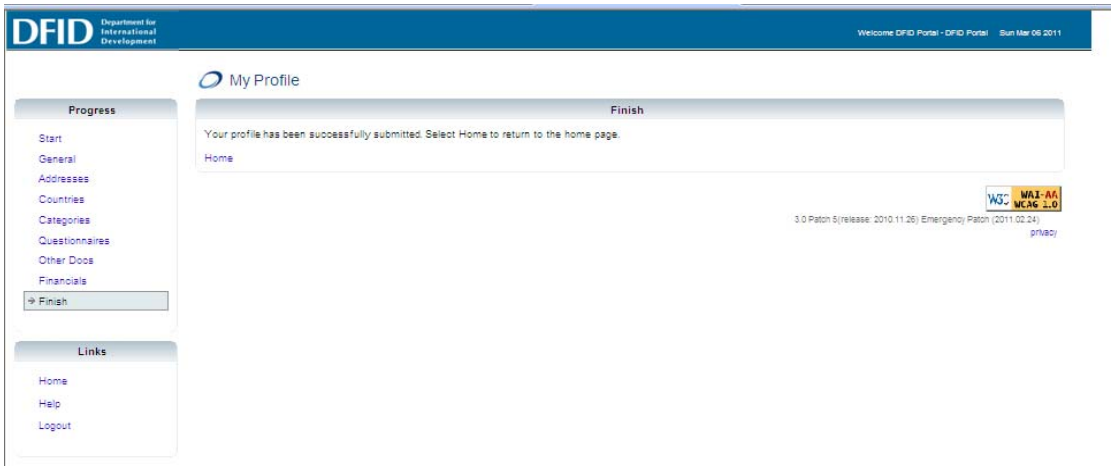
If your bank account is outwith of the UK you should select "sameday" as the payment method. This does not mean you will receive payment on the same day but that when DFID obtains an exchange rate we will process on that day.

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.

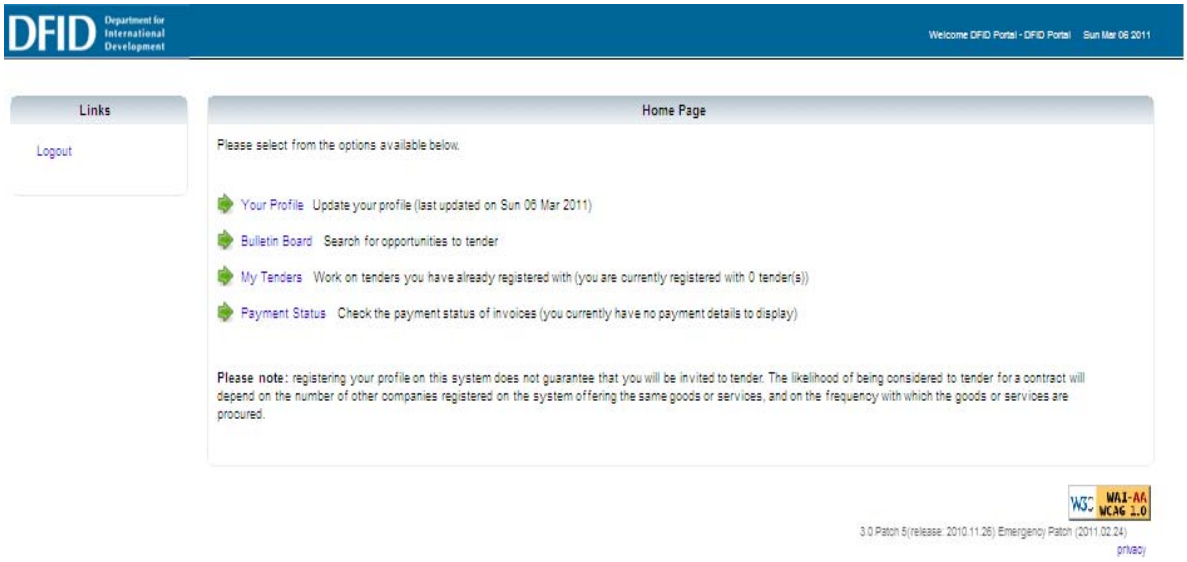




Home Page

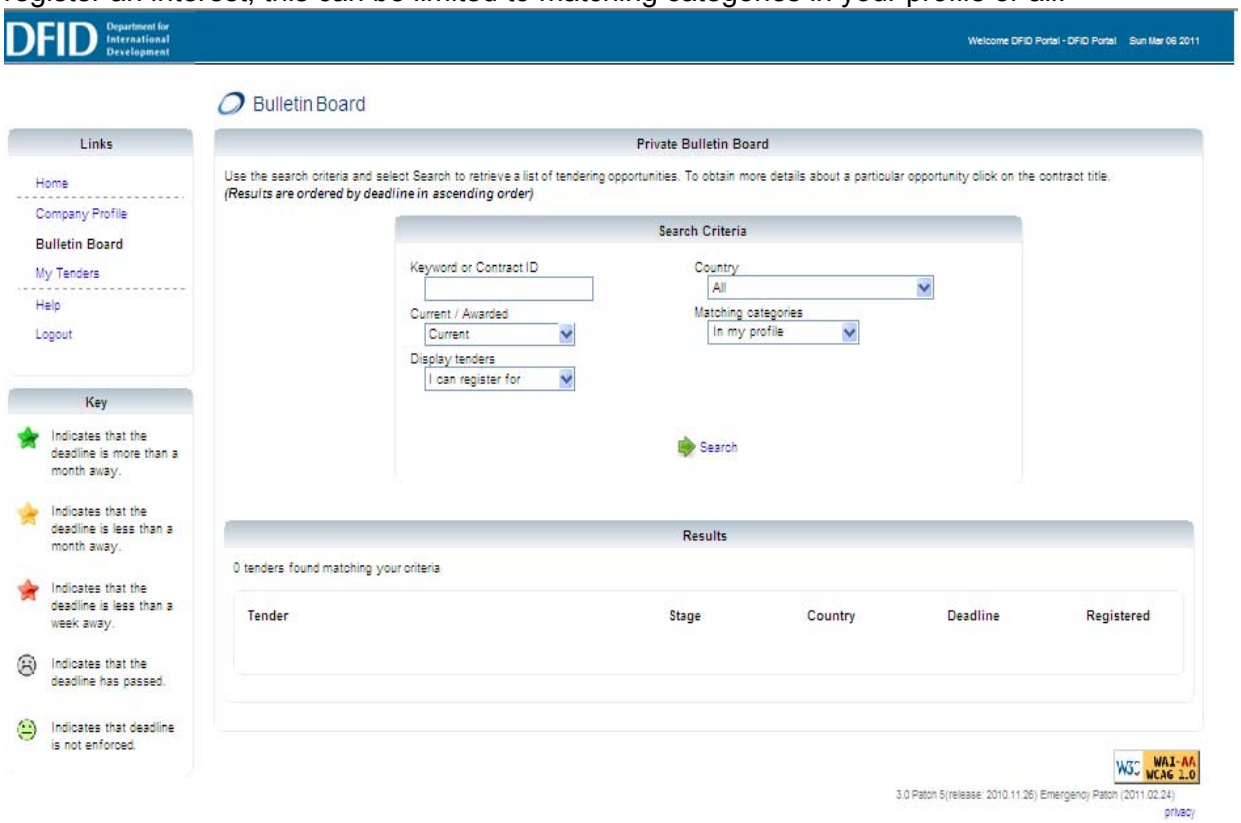
After setting up your profile when you log in you start from your Home Page.

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)



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.



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