DFID Supplier Portal

Help and Guidance for Existing Suppliers/Fund Recipients

> **Please refer to the guidance below when using the DFID Supplier Portal, a list of frequently asked questions is also available [see 'DFID Supplier Portal – FAQ']**

The DFID Supplier Portal is an online database which holds the registration details of all suppliers' and fund recipients'. It is the responsibility of the supplier and fund recipients to maintain the information held on the DFID Supplier Portal. It is vital that the information held on the DFID Portal is accurate as this will influence DFID's decision making and payment processes, enabling e-tendering and other e-procurement tools reducing both our costs and yours.

All new business over £101, 323k will be advertised/tendered through the DFID Supplier Portal. To take part in any future opportunities, suppliers must first register.

DFID Portal Welcome (log-in) page

When you open the DFID Portal Welcome (log-in) page you will see that there are 3 main areas:

Existing Suppliers/ Fund Recipients
For users to log in using their existing username & password

Bulletin Board
For both registered and non registered users to view contract opportunities and awarded contracts

New Suppliers/ Fund Recipients
For new users who want to set up a new company profile with DFID

When providing information on the DFID Suppliers Portal, please ensure that you do not use the back button on your pc as you will lose any information you have already input. Click Previous **to go back at any time during the process.**
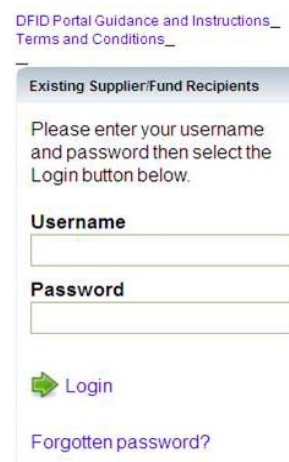
Security

DFID has taken steps to ensure that the DFID Portal is secure and that all sensitive information is protected. However it is **your** responsibility to ensure that your username and password are safeguarded and that your contact email is available only to people who have the authority to view and amend the contact details we hold for you. **Before using the DFID Portal, please ensure that you read and understand the Terms and Conditions.**

Completing your company profile

⚠️**If you wish to amend any of the details on your profile, you can click ← Previous at any time during the process. DO NOT use the back button on your laptop or pc as you will lose any information that you have input.**

As an existing supplier, DFID will already hold information about your company. DFID may have already contacted you via the contact details already on our system. Once you have registered using the steps above, you can log into the DFID Portal. **To express interest in tenders, you must review/amend your company profile.**

Step1: Log into the DFID Portal by inputting the username and password that you registered in the module at the top left of the **DFID Portal homepage** and clicking ➡ Login

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

Forgotten password?

Step 2: Click **Your Profile** to continue. You will then arrive at the 'Start' page where you will see a list of categories to be completed.

Step 3: Click ➡ Next to start this process.

⚠️ **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.**

Forgotten username/password

If you forget your username or password, follow these simple steps:

> **Step 1:** Go to the 'Existing Suppliers/Fund Recipients' module on the top left of the **DFID Portal homepage** and click Forgotten password?

> **Step 2:** Enter the contact email address that you originally used when registering with the DFID Portal and click ➡ Continue

> **Step 3:** An email will be sent to your email address containing confirmation of your username and email. You will also receive a new temporary password.

If you do not receive a confirmation email, you may wish to check your junk folder. If the email has gone to your junk mail folder you will wish to adjust your junk mail settings to ensure that this does not happen again.

As a security measure, after 3 failed login attempts the Portal automatically locks your account and any further log-in attempts will fail. If this happens, please email Query-DFIDPortal@dfid.gov.uk . You will receive an email confirmation.

Completion your registration

General Information

Organisation Information

You will note that part of the information required has already been populated when you open this page, however, it is important that you review and complete as many of the available fields on this page. Please ensure that you complete the full contact details of your organisation, and include your organisation registration number.

Business Classification

Completion of this section is mandatory. If you find that more than one category is relevant then please ensure that you tick more than one box.

Once you have completed these sections, click ➡ Next to go to the next section.

Addresses

It is vital that we hold the most accurate information about your organisation, especially if you have requested to receive Tender alerts. **Please ensure that you input your full contact details when completing your company profile**.

The portal will automatically lock down an account if two users with the same log-in credentials try to access the system at the same time. To ensure that this does not happen, you can attach multiple users to your company profile. Each user will have a unique log-in which will enable different people from the same organisation to access the DFID Supplier Portal at the same time.

If you wish to add more than one address, or create more than 1 user for your organisation simply click ➕ Add . This will open up a new page where you can register your additional addresses.

It is mandatory that you complete the contact details for all additional addresses and you must also fill in your log in details once you have completed your additional address information.
Once you have finished adding the address and contact information, please ensure that you click 💾 Save . **If you do not click** 💾 Save **or you click** ❌ Cancel **instead, your additional addresses will not be saved to your profile.** Click ➡ Next to go to the next section.

🟢**You can also change your password in the Addresses section.**

Countries

It is very important that you complete this section as we need to know which countries that you either can or do operate in. If no countries are selected you cannot register for tenders. Please ensure that you **at least** select 'UK', 'India' and 'Procurement' to view opportunities.

Step 1: click on ➕ Add and tick the countries that are relevant to you. If your organisation operates globally, you can click Select All, at the bottom of the page. You **must** click at least one country option.

🟢 **If you choose** Select All **, you will see that the screen will take some time to refresh. This is nothing to worry about - the system is simply logging the information.**

Step 2: Once you have finished this section, ensure that you click 🖫 Save . If you do not click 🖫 Save or you click ✕ Cancel instead, your country choices will not be saved to your profile.

Step 3: Once you have finished completing the 'Countries' section, click ➡ Next to go to the next section.

Add Category

Categories within DFID (also called products) are how we identify different areas of expertise or spend, DFID can source suppliers/contractors in procurement exercises based on the category of supply. Categories within DFID are split into 3 different groups:

- Programme (development) codes start with PS followed by 5 digits;
- Corporate (services for DFID) start with CS.
- Goods and equipment which cover both programme and corporate services begin with the code GE.
- Fund Recipient (organisations receiving grants or fund disbursements from DFID)

Fund recipients

Categories should be used for organisations that received both MOU funding as well as Accountable Grants. If your organisation received grants or fund disbursements from DFID you should ensure that you select 'Fund Recipient' as a category – when you select this category you will not receive any alerts about opportunities that are requesting the services of suppliers.

Suppliers

Step 1: Click on the text box and enter a keyword such as Health, Education, Governance etc then selecting ➡ Search . You can also add a category by leaving the text box empty and simply clicking ➡ Search .

Step 2: A page containing a list of categories will open. Tick each Category you wish to add.

Step 3: Once you have finished adding all the categories you want, ensure that you click 🖫 Save . If you do not click 🖫 Save or you click ✕ Cancel instead, your country choices will not be saved to your profile.

Step 4: Once you have finished completing the 'Add Category' section, click ➡ Next to go to the next section

🟢**It is important that you must complete at least one option in this section to identify your area of expertise as you will then receive email alerts relating to this. If you cannot find an exact match, simply select one which is closes to the field in which your organisation operates. Certain categories will require approval by DFID. Please ensure that you view the 'Questionnaires' section after you select your categories**

Questionnaires

Once you select your relevant categories you may find that you will be required to submit further information on a questionnaire. To download a questionnaire, select the download link then save the document on your PC.

Click 🟢 Next to go to the next section

If no questionnaires appear on this page then we do not need any more information.

Other Documents

This section has been created to enable suppliers and fund recipients to upload general company/promotional information. It is your responsibility for the content of the documents uploaded to this section, however DFID reserve the right to remove any material which they deem inappropriate.

Click 🟢 Next to go to the next section

Financials

It is very important that we hold accurate bank details for your organisation, as DFID uses this information to pay you for your services. **It is your responsibility to ensure that the information held is accurate – if you do not keep this information up to date your payments may be delayed.**

You will be required to input your bank address, preferred payment terms, payment method and currency

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

 You will not be able to register if you have not entered your financial details and we cannot make any payments if you have not input your sort code and account number!

Once you have completed all your bank details, please double check that they are correct. Click to go to the 'Finish' section. You **MUST** go to the 'Finish' section to save all the information that you have registered in your profile.

If you wish to amend any of the details on your profile, you can click at any time during the process.

Finish

We need to know when your organisation makes changes to your contacts, bank details or even your title.
This page will allow you to alert us of any changes you have made.

To complete this section follow these steps:

Step 1: Select the relevant boxes on this page to alert us of any changes. If you haven't made changes to your profile, there is no need to alert us. Your company profile will be automatically updated.

Step 2: To complete the registration process and notify us of your new company profile you must click ➡ Finish . This will allow you then to register your interest in published tenders.

Step 3: Your profile has been successfully submitted! Select Home   to go to the homepage – this is the page where you will log in from once you have set up your profile.