



Corporate Procurement (Supplier)

Supplier Registration, Accessing and Applying for Opportunities





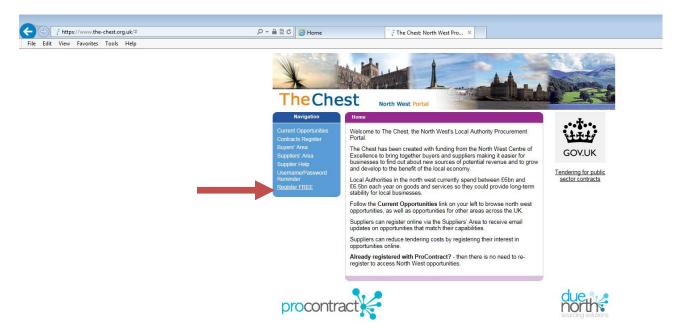
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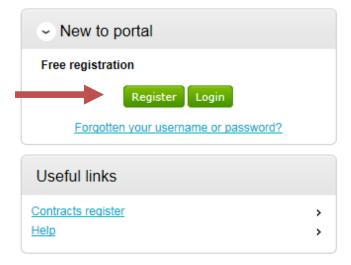


Setting up as a New Supplier

Step 1 – Navigate to the homepage of The Chest, <u>www.the-chest.org.uk</u>, and select 'Register Free'.



Step 2 - This will bring you to the 'Supplier Pre-Login' page, in the 'New to Portal' box select 'Register'.

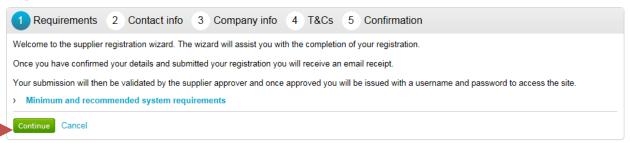






Step 3 – You will then be brought to the Register page. There are <u>five steps</u> to complete; complete the steps with the necessary information where requested. The first step details the process of registering as a supplier on The Chest Portal. Once you have read the description select 'Continue'

Register

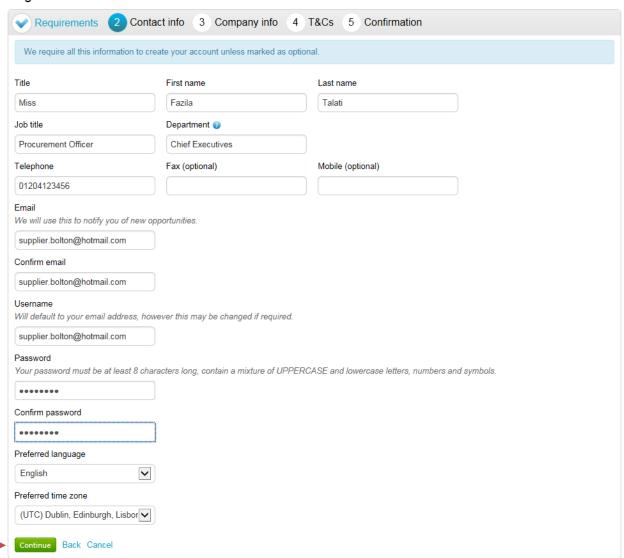






Step 4 – This will then bring you to step 2 'Contact info'. In this section you are required to complete your contact details, your **username** will be generated within this stage (by default it will be your email address however you are able to change this) and also prompted to enter a **password** of your choice. *It is recommended that you keep a record of these details.* Once you are happy with the information you have submitted select 'Continue' as shown in the screenshot below.

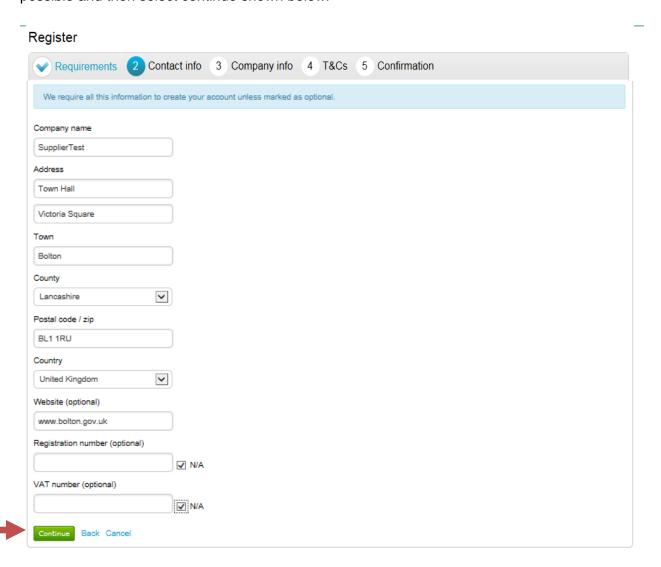
Register







Step 5 – The next section is 'Company Info'. Fill out as much of your company's information as possible and then select continue shown below.

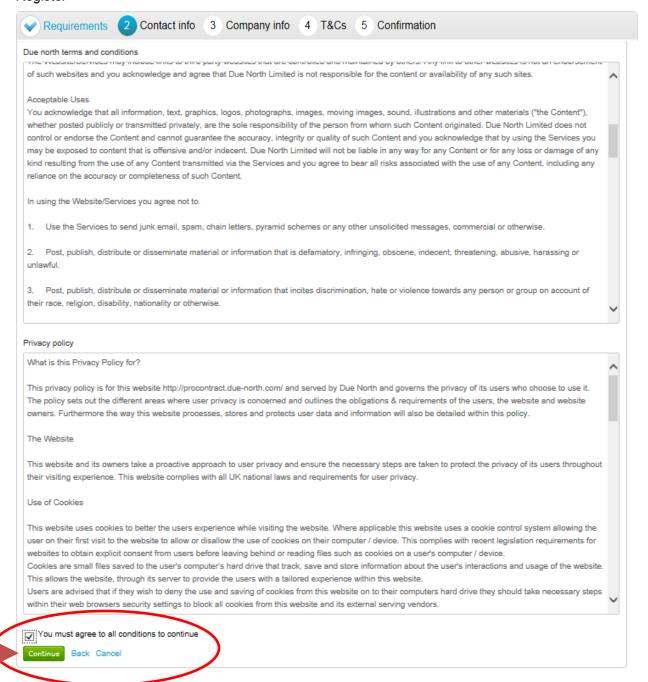






Step 6 – The next section will bring you to the 'T&Cs'. Once you have carefully read the terms and conditions and the privacy policy you will need to select the tick box 'you must agree to all conditions to continue' and then select 'Continue' as shown in the screenshot below.

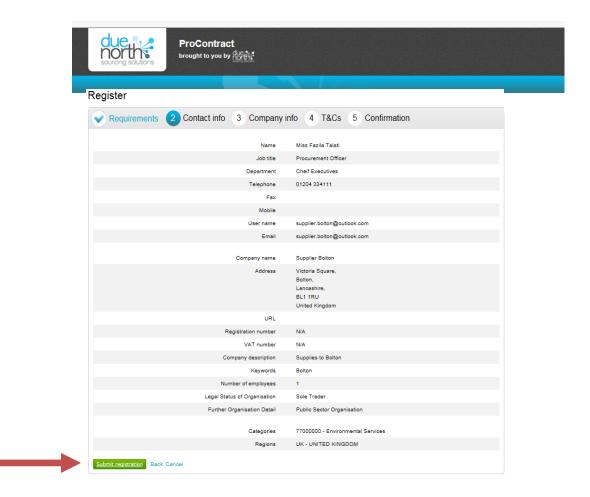
Register







Step 7 - The final stage will be the summary of all the information you have entered. It is recommended that you have a final check of your details before you submit your registration. Once you are satisfied that the information required is complete select 'Submit Registration'.



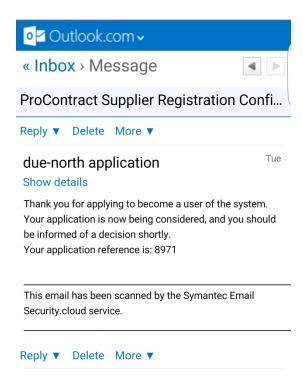




Step 8 – You will receive an acknowledgment message to confirm the registration details and will be informed of the outcome. Then select 'continue' to complete the submission process.

You will receive an email to confirm your application has been received and be provided an application reference number which can be used to track the progress of your application. *Please note the notification of the outcome may take 24 hours.*

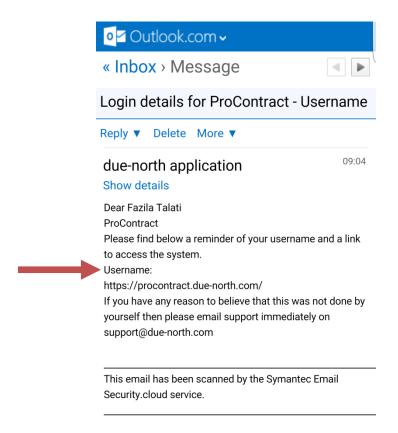




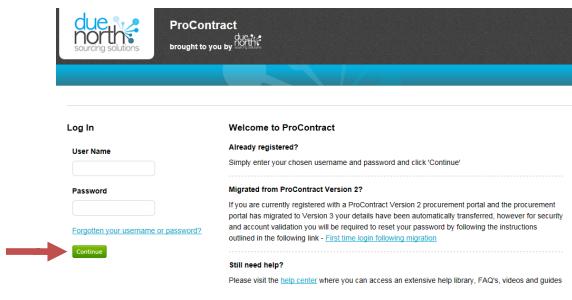




Step 9 - Once your application has been accepted an email will be sent to confirm this as shown below. Copy and paste the link below on to the address bar on your internet browser e.g. Internet Explorer, Google Chrome, Firefox etc.



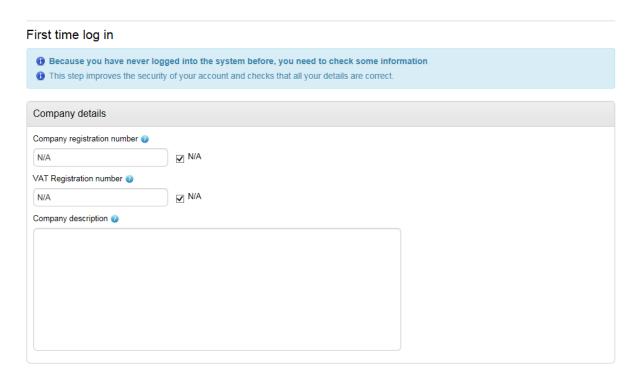
Step 10 - Log onto 'The Chest' system as a supplier using your username and password and select 'Continue'



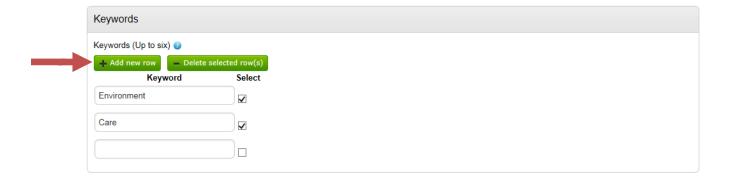




Step 11 – In this section "First time log in" you will need to check your company details are correct, if there are any changes to be made in the company details section you will be able to change this here.



Step 12 – The next section is about Keywords, you can type up to 6 keywords which relates to your business. These keywords will then be used to notify you for the different types of opportunities/tenders advertised which may be of interest to you and your company to tender. To do this, click on "add new row" and type in your own keywords which relates to your business and click on the tick box next to it to select.



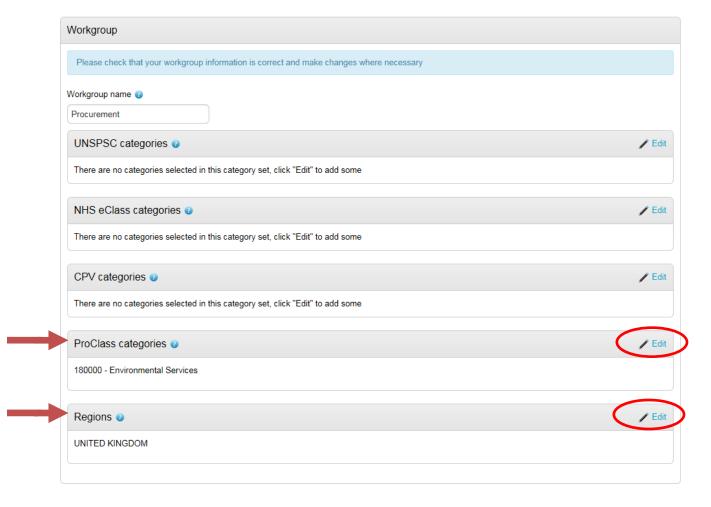




Step 13 - The next section 'Workgroups" will also help allow you to be notified via email of different opportunities/tenders advertised which may be of interest to you and your company to tender. Click on "Edit" within the "ProClass Categories box" and select which category applies for your business.

Please note you are not required to complete UNSPSC, NHS eClass and CPV categories

Click on "Edit" within the "Region" box to select the geographical area in order to receive email alerts for opportunities/tenders within that regional area. For example the North West, Greater Manchester etc







Step 14 – You will then need to select the classification and type of organisation your company is and also provide your "Voluntary Community Sector (VCS) Registration number" if applicable and type in the number of employees your company has.

Classifications	
Please check that your classification selections are correct and make changes where necessary	
Legal classification @	
Charitable Incorporated Organisation (CIO)	
Community Interest Company (CIC)	
General Partnership	
☐ Industrial & Provident Society	
Limited Liability Partnership (LLP)	
Limited Partnership	
Private Company Limited by Guarantee (LTD)	
Private Limited Company (LTD)	
Public Limited Company (PLC)	
Sole Trader	
Unlimited Company	
□ Other	
Further classification (optional)	
Public Sector Organisation	
Social Enterprise Partner	
Living Wage	
□ Enterprises	
Charity	
A Company Owned & Managed By Women	
Black and Minority Ethnic (BME) Organisation	
Social Enterprise (SE)	
Franchise	
□ Voluntary Community Sector (VCS)	
☐ Mutual	
VCS registration number	
Please provide your registered VCS number where applicable	
□ N/A	
Number of employees	

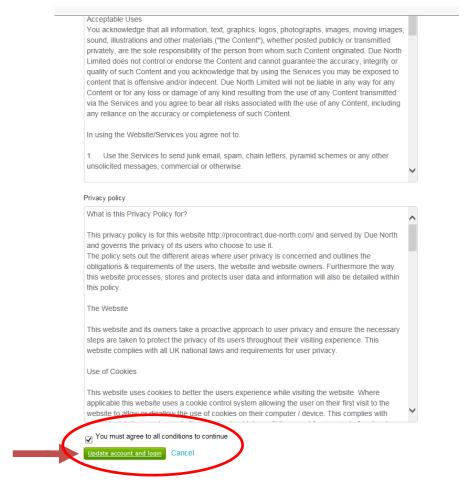




Step 15 – Next, you can choose to receive email notifications from The Chest. We highly recommend that this is selected as "Yes".



Step 16 - The next section will bring you to the 'T&Cs'. Once you have carefully read the terms and conditions and the privacy policy you will need to select the tick box 'you must agree to all conditions to continue' and then select 'Update account and login' as shown in the screenshot below.



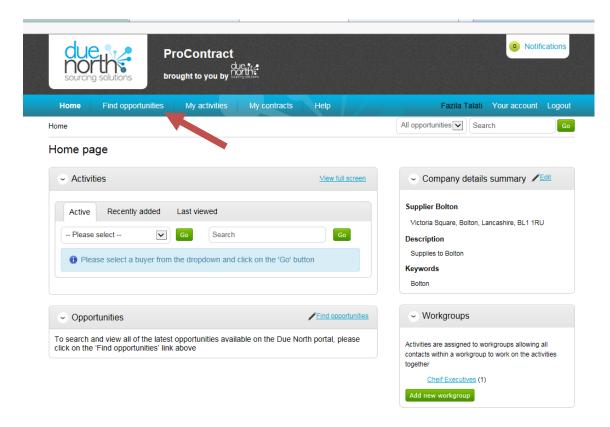
Once you have clicked on "Update account and login" you will then be returned back to the main log in screen.





Accessing and Applying For Opportunities

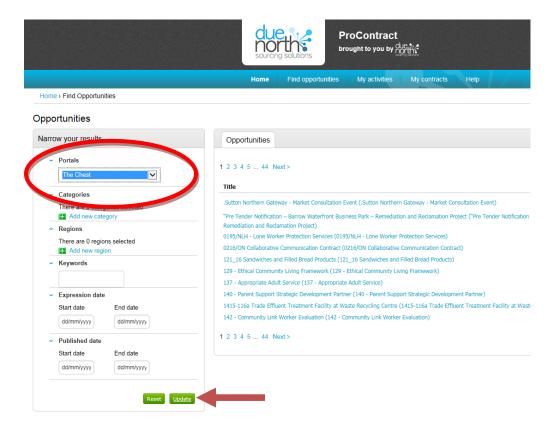
Step 1 – Once you have logged on To The Chest as a supplier you will be brought to the 'Home page below. Choose 'Find Opportunities' as indicated.







Step 2 – On the left hand side under the 'Organisations' drop-down menu in the 'Portals' box select 'The Chest' and then select 'Update'



Step 3 - Next, under the 'Organisations' tab select 'Bolton Council, then click on 'Update'

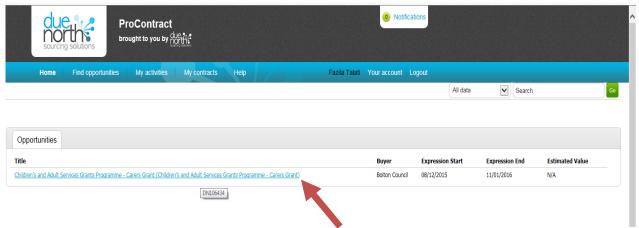
Narrow your results Portals ~ The Chest Organisations AGMA Allerdale Borough Council Barrow in Furness Borough Council Blackburn with Darwen Council ton at Hon Bolton Council urnley Boro Carlisle City Council Cheshire East Borough Council Cheshire Fire and Rescue Services Cheshire West and Chester Chorley Council Copeland Borough Council Cumbria County Council Eden District Council Fylde Borough Council Greater Manchester Fire and Rescue Service Greater Manchester Police Authority Greater Manchester Waste Disposal Authority Halton Borough Council Housing Maintenance Solutions Hyndburn Borough Council Knowsley Council Lake District National Park Lancashire County Council Lancaster City Council Liverpool City Council Reset Update

Opportunities - Search results

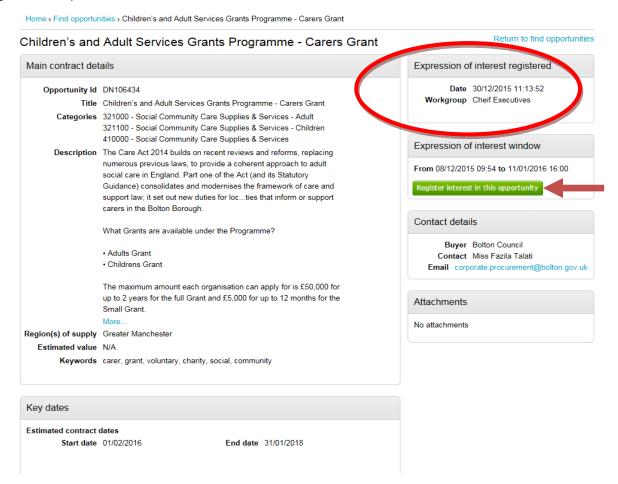




Step 4 - This will bring through details for opportunities for Bolton Council. Click on the Title Link as indiacated below.



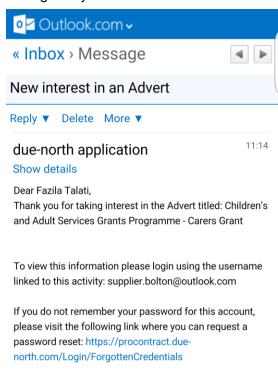
Step 5 – You will then be able to view the opportunity under Main Contract Details which provides you with a summary about the opportunity advertised. On the right hand side select 'Register interest in this opportunity'. The same area will now show **confirmation** of the registered Expression of Interest.



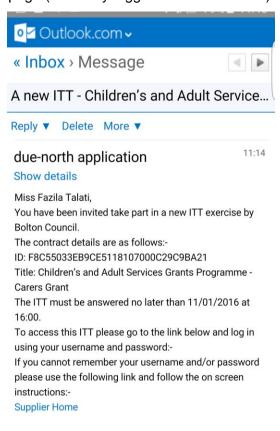




Step 6 – An email will then be sent to the email address which was provided at Supplier Registration stage, confirming that your interest for the Advert has been successful



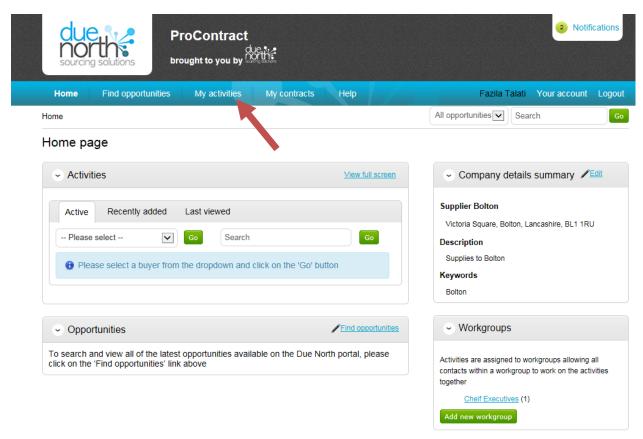
Step 7 – A further e-mail will also be sent which will provide a link 'Supplier Home' which will direct you to your homepage (if already logged on to The Chest)



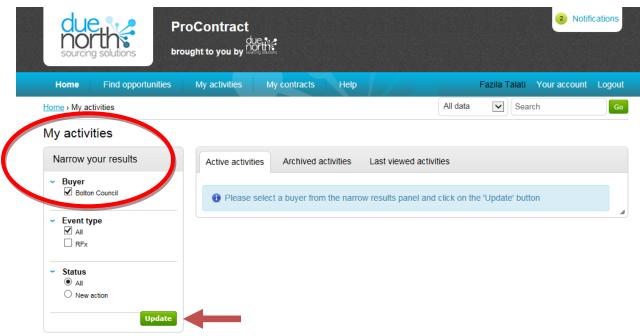




Step 8 – This will then bring you to your supplier homepage. To navigate to the opportunity select 'My activities' as shown below.



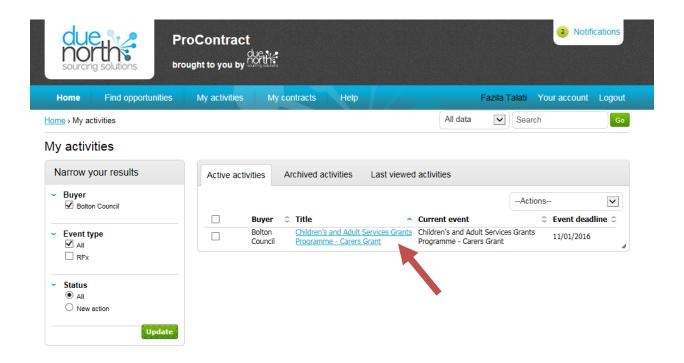
Step 9 - On the left hand side of the 'My Activities Page' click the tick box 'Bolton Council' and then select 'Update' as shown below.



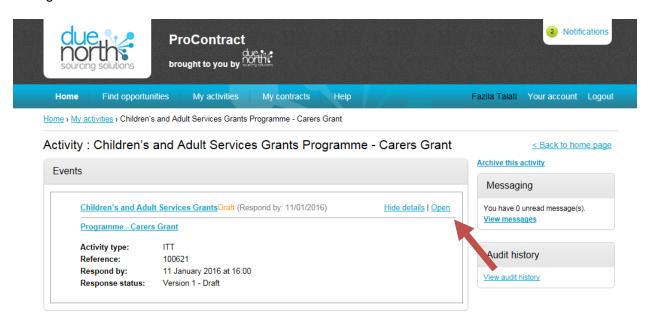




Step 10 – Find the opportunity which you have invited to take part in and click on the Title Link as indicated.



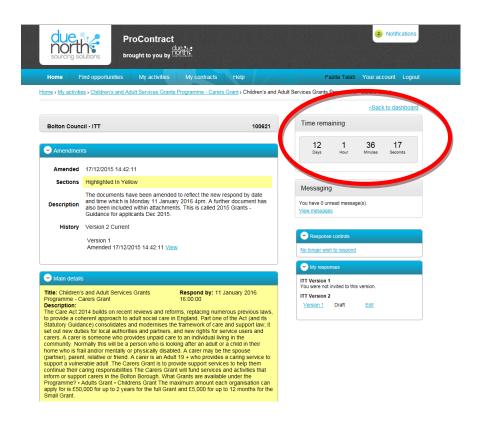
Step 11 - This will then bring you to the following Activity page . Select 'Open' as shown below to begin to view further information.

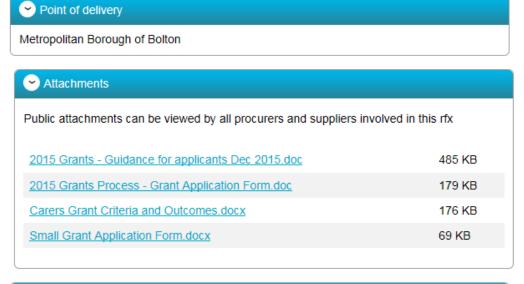






Step 12 – The following screens will show the tender information and the tender documents terms and conditions for suppliers to download on to your computer, complete and save. The tender documents will consist of the specification, questionnaire, pricing documents and any other relevant information, whichever is applicable. You will also be able to view the countdown timer on the top right hand side of this page which displays how long you have left to submit your opportunity.







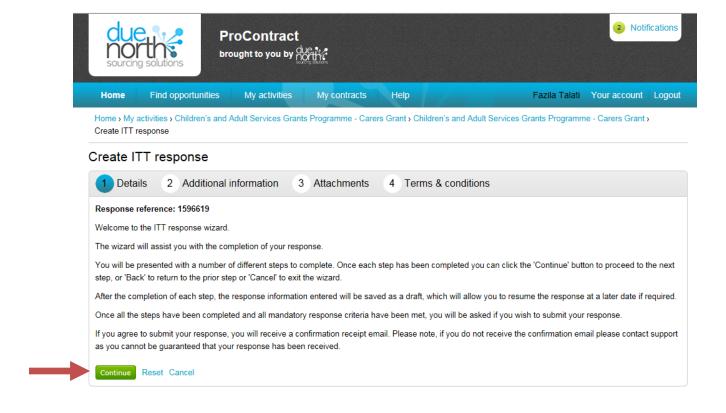




Step 13 - Once you are ready to submit your application under Response Controls click on 'Start my response' as indicated.



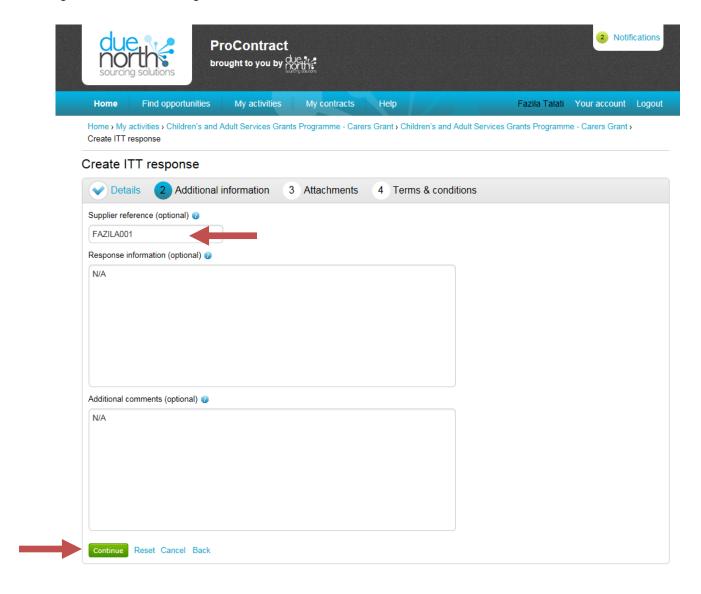
Step 14 – The supplier ITT Response wizard will guide you through each required section so that a response can be submitted. The first stage is the Details section which provides detail on how to submit your application. There are **three** steps to complete, Step 1 – Additional Information, Step 2 – Attachments and Step 3 – Terms and Conditions. Click on 'Continue' to start the response process.







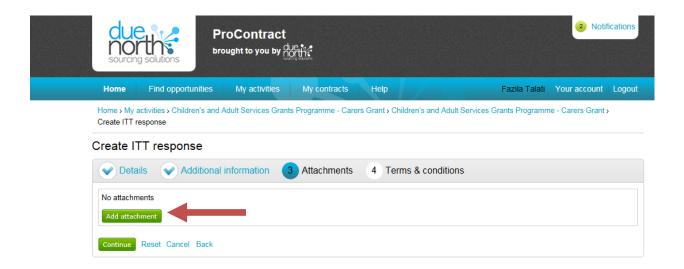
Step 15 - In the 'Supplier Reference' field it is recommended to enter a unique reference name for your tender. This can be any reference you wish to use e.g. FAZILA001, Company name etc. Response Information and Additional Comments are not required. Then click on 'Continue' to go on to the next stage.



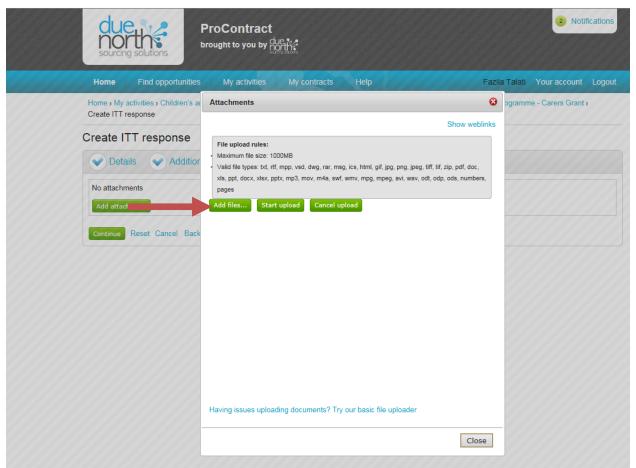




Step 16 – The Attachments stage allows you to add any attachments (Application/Tender Submission) Select the 'Add Attachment' button

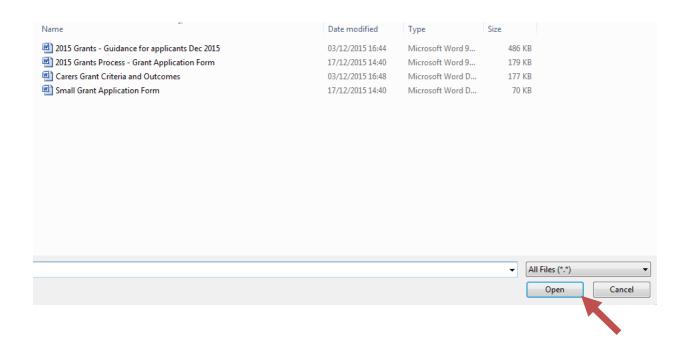


Step 17 - This will then bring you to the attachments screen. Select 'Add Files' as indicated via the Advanced Uploader Tool.





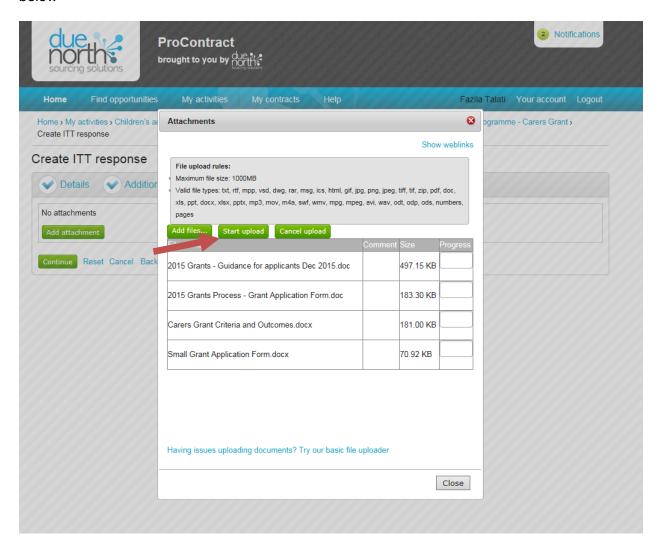
Step 18 – Navigate to your file on your computer, choose the documents you want to attach and click 'Open' as shown. You can select more than one file at this point by keeping the Shift button pressed and selecting the files via your mouse.







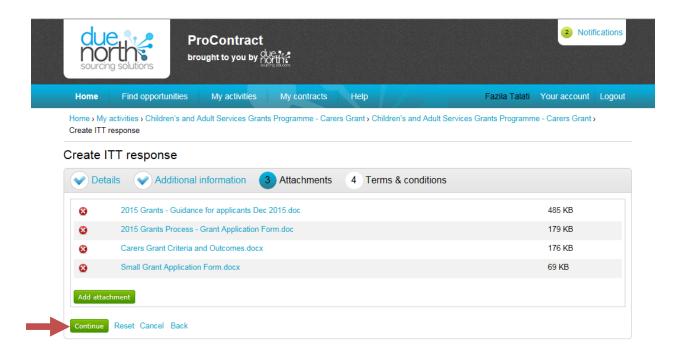
Step 19 – Once you have chosen all your files for upload select 'Start upload' as indicated below







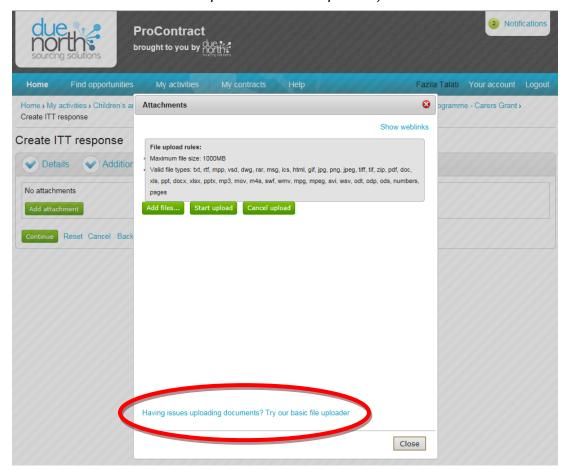
Step 20 - The files are now uploaded and can be seen attached as shown below. If you want to delete the attachment you can click on the red X button and click on OK to confirm deletion of the attachment. If you need to attach further documents click on the Add Attachment(s) button and follow the process as per Step 16-18. If you have finished uploading attachments, click on the 'Continue' button.







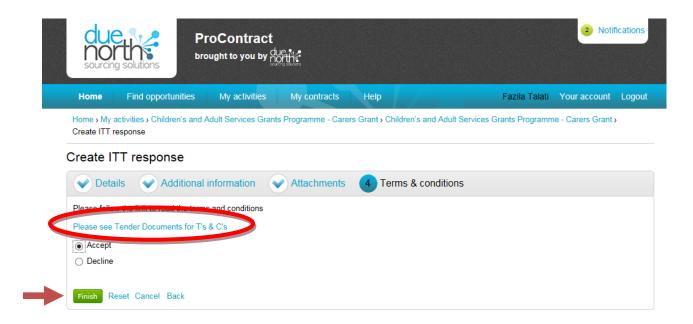
(If you have any issues uploading the documents via the Advanced Uploader Tool select the link as shown below and follow the steps via the Basic Uploader)



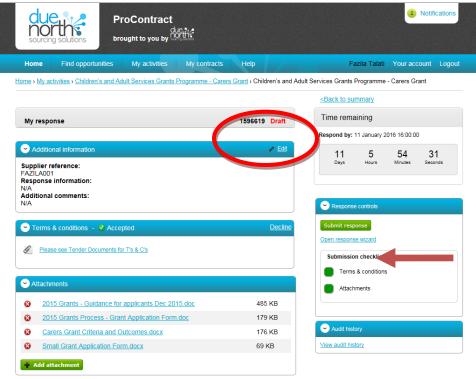




Step 21 – The final stage is Terms & Conditions. In the link 'Please see Tender Documents for T's & C's' it will show the Terms and Conditions for Bolton Council that must be met in order to to be viable for this tender process. Click on 'Accept' and then 'Finish' to accept these.



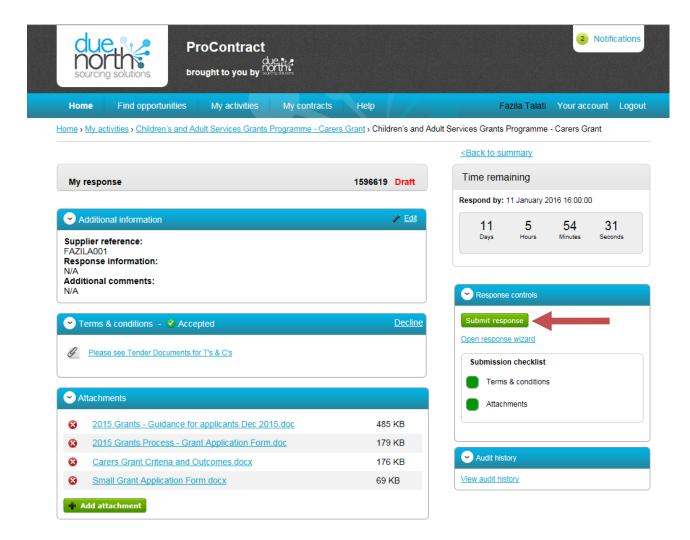
Step 22 - You will then be bought back to the 'My response' page which will show a summary in a Draft format and provide you with an Application Response Number as shown below. Should you wish to edit any of the Steps (Tender Information, Attachments, Terms and Conditions) you can do so by selecting 'Open Response Wizard' on the right hand side under the Response Controls box and following the above steps.







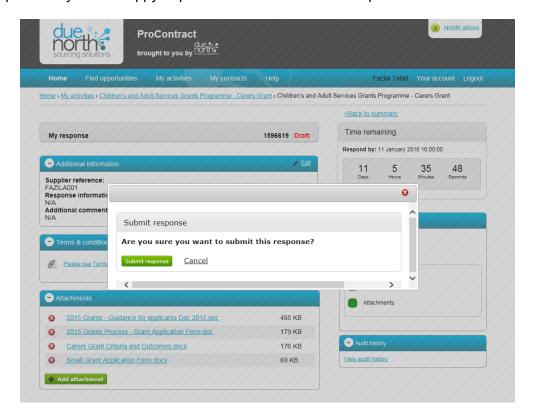
Step 23 – You are now ready to submit your tender application. It is recommended that you have a final check of the tender documents before they are submitted. Once you are ready to submit, click on 'Submit Response'.



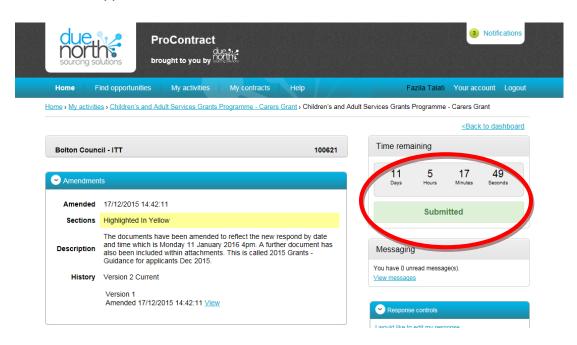




Step 24 - You will receive a message confirming if you are sure you want to submit your response. If you are happy to proceed click on 'Submit Response' otherwise click on Cancel.



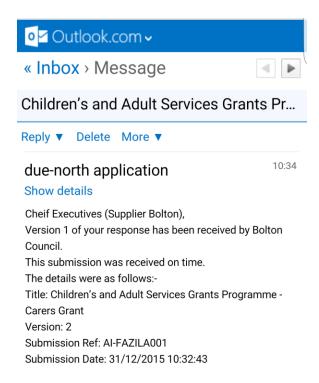
Your tender application is now submitted as shown below.



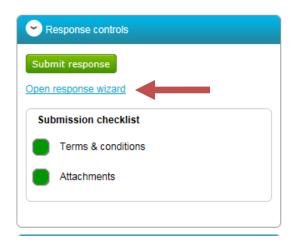




Step 25 - You will also recieve an e-mail to the address you provided to confirm the submission of the application form



Step 26 - Please note if you wish to edit your response and the tender deadline date and time has not passed then you can edit your response. To edit your response select 'I would like to edit my response', select 'Open Response Wizard' and follow steps 13-23.



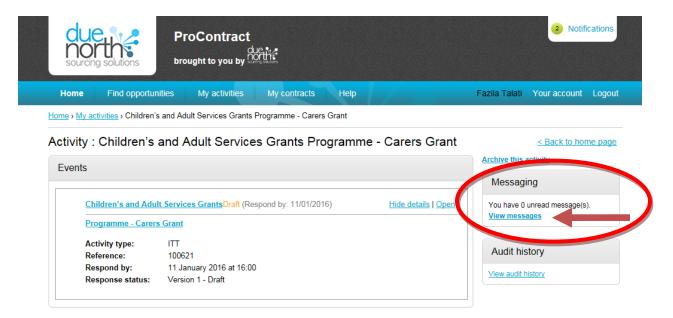




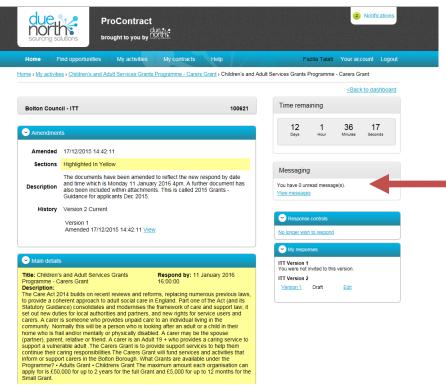
Posting Questions regarding Opportunity/Tender

Step 1 - Should you wish to ask any questions regarding the opportunity you wish to apply, you can do so via the Messaging Tool. Messages can be accessed via two ways (see screenshots below). Select 'View Messages'

Screenshot 1



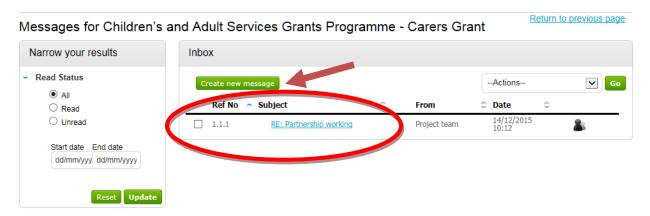
Screenshot 2







2 - This will then bring you to your inbox page. Here you will be able to view any existing messages from other suppliers and also have access to create your own message which will be sent to the Procurement Team. To create a new message select 'Create new message' button.



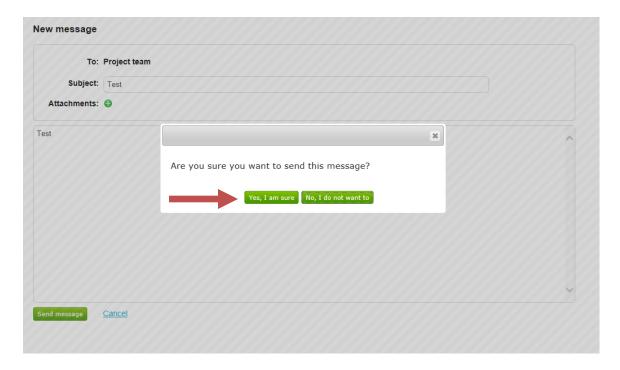
Step 3 - You will then need to add a subject title, you will also be able to add any attachments if necessary and create your message/question as shown below. Once you have entered all the information select 'Send message'

	d opportunities My activities My contracts Help Fazila Talati	Your account Logo
me > My activities	> Children's and Adult Services Grants Programme - Carers Grant > Messaging > New	
ew message		
To:	Project team	
Subject:	Test	
Attachments:	•	
est		

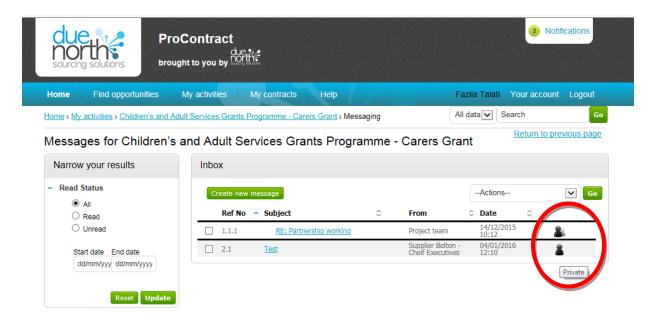




You will be prompted to confirm whether or not you wish to send your message. Select 'Yes, I am Sure'



Step 4 - You will be brought back to the message inbox to await a response. Once a response to your question has been submitted, you will receive an email notification to confirm this. Here you will then be able to see whether your message has been made public or private – this will be decided by the Procurement Team as the response may be applicable for other interested suppliers.



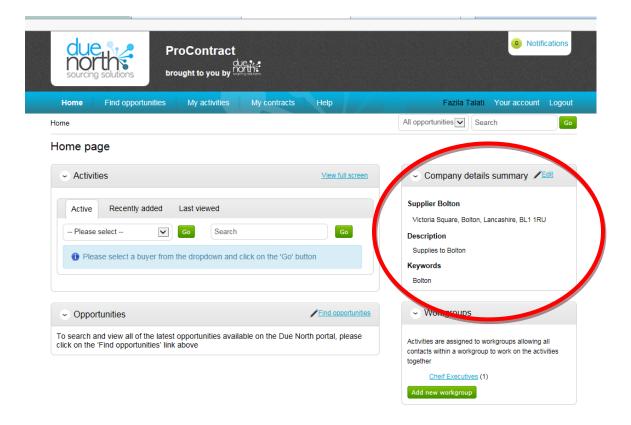




Edit your Company details

Should you wish to edit your 'Company details, navigate to the Homepage. Here you will find the 'Company details summary' tool box.

Step 1 - Select 'Edit'







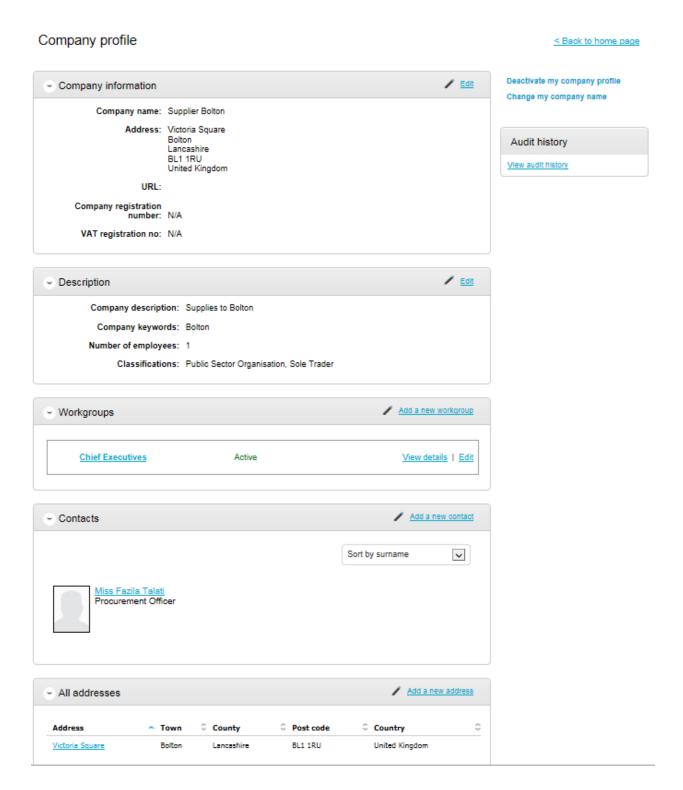
This will then bring you to your 'Company profile' page (Screenshot 1) whereby you can edit/change the following details.

- 1. Company Information
- 2. Description
- 3. Workgroups
- 4. Contacts
- 5. All Addresses





Screenshot 1



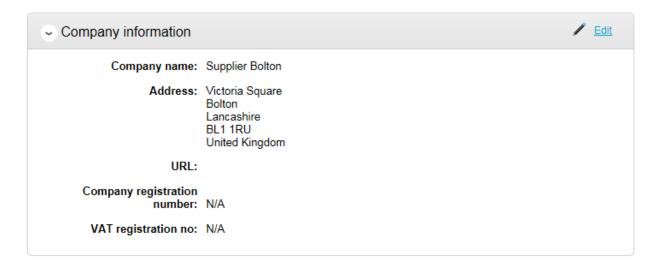




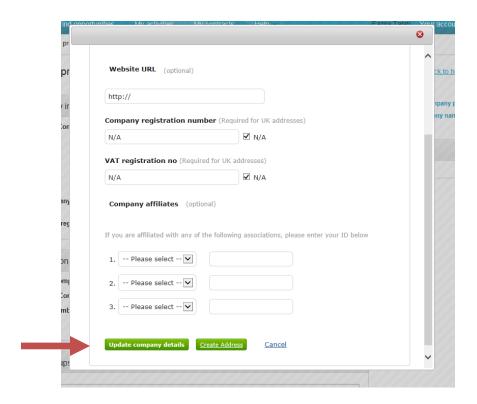
1. Company Information

In this Section you will be able to change your 'Company Information'

Step 1 - To do this, select 'Edit' as shown below.



Step 2 – Add the information you require and select 'Update Company details' as shown in the screenshot below.







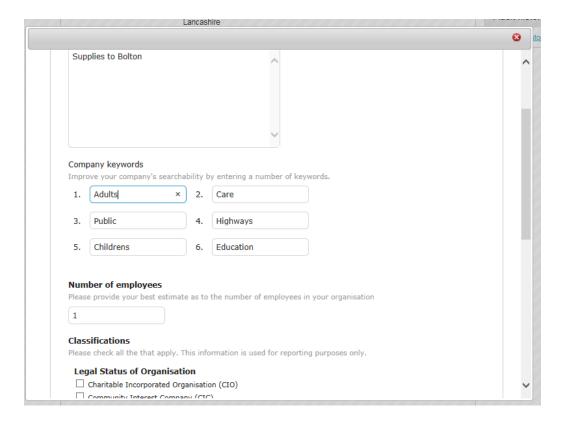
2. Description

In this section you will be able to add/delete the description of your company. This will be useful as the description you enter can help notify you of opportunities/tenders you may be interested in.

Step 1 - To edit your company description select 'Edit' as shown below



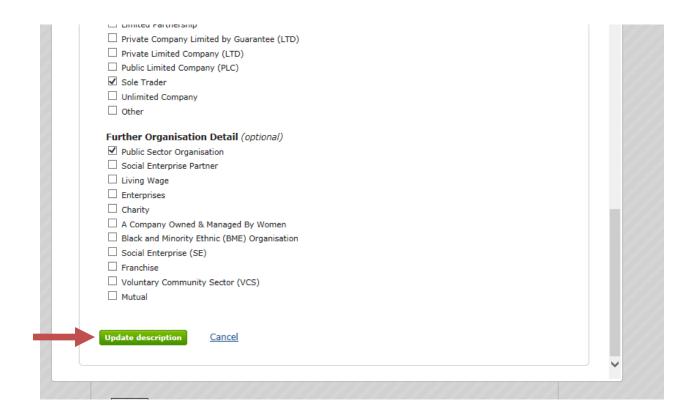
Step 2 – Include as much information as possible which best describes your company in order to be notfied for the type of opportunities/tenders you may be looking for







Step 3 – Once you are happy with all the information you have applied select 'Update description' as shown in the screenshot below.







3. Workgroups

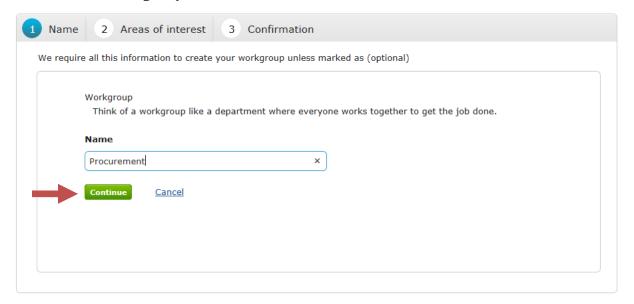
In this section you can add new Workgroups or edit current workgroups which are on your account. This is useful if more than one department wishes to be notified for different opportunities/tenders.

Step 1 – To add a new Workgroup click on 'Add a new workgroup'



Step 2 - Provide a name for your workgroup and select 'continue'

Create a new workgroup



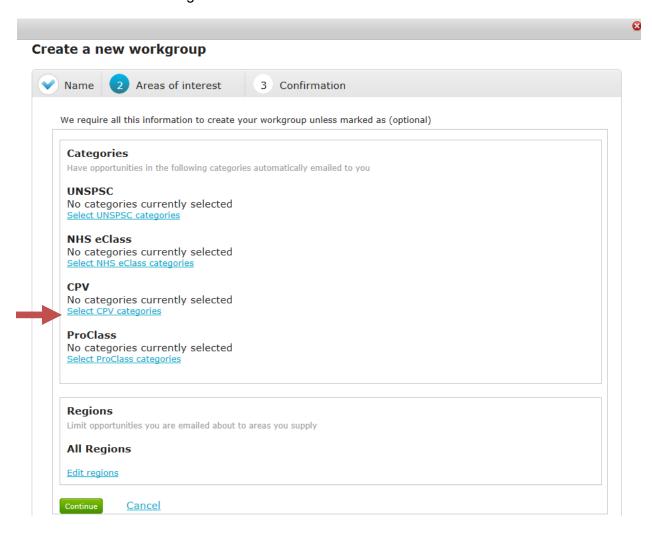




Step 3 – CPV and Proclass categories will need to be selected to ensure you receive notifications about tenders/opportunities you may be interested in.

Please note USNSPSC and NHS eClass are not used by the Authority.

Click on 'Select CPV Categories'

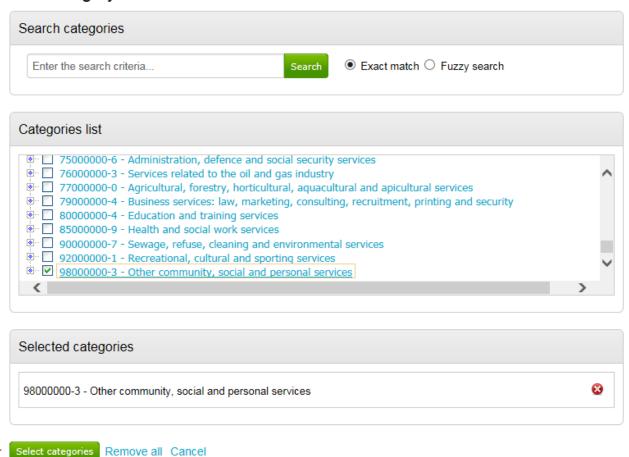






Step 4 – Choose the appropriate category that will be of interest to your organisation and click on 'Select Categories'

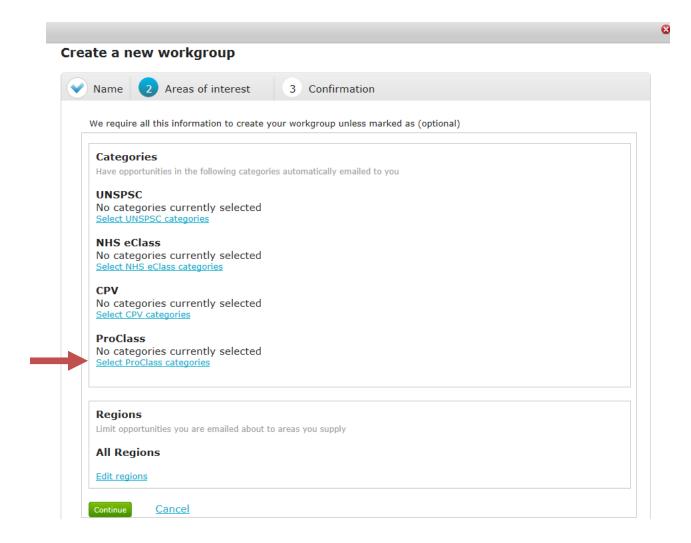
CPV category selection







Step 5 - Click on 'Select ProClass Categories'

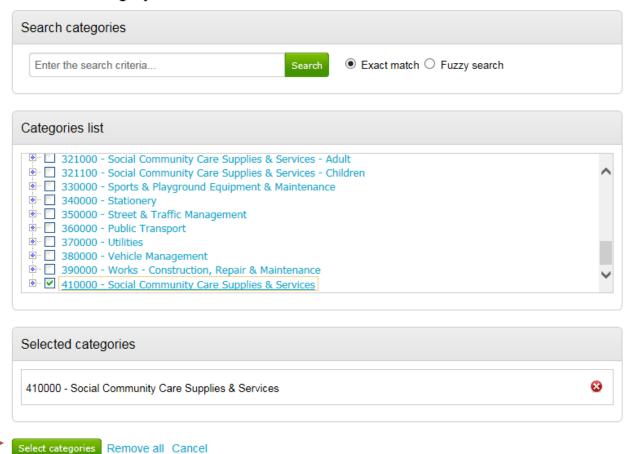






Step 6 – Choose the appropriate category that will be of interest to your organisation and click on 'Select Categories'

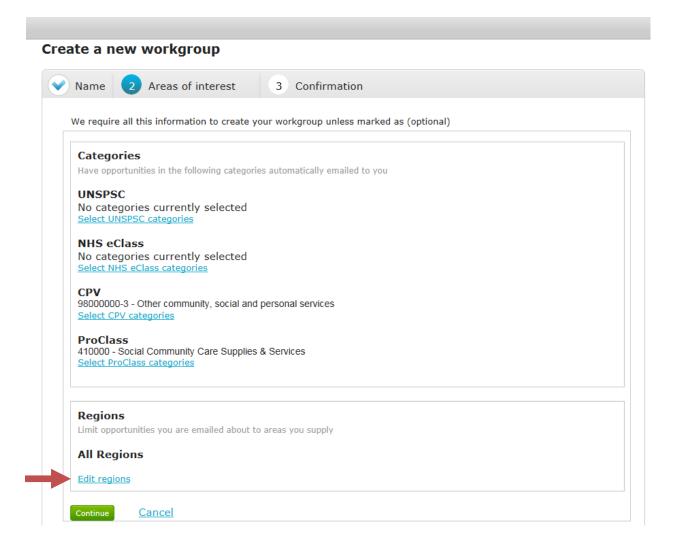
ProClass category selection







Step 7 – Click on 'Edit Regions' to show opportunities for the geographical area you are interested in to supply.

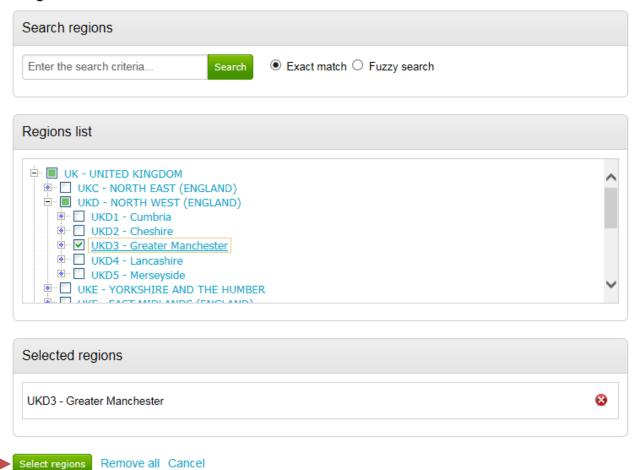






Step 8 - Choose the appropriate region for the geographical area you are interested in to supply and click on 'Select region'

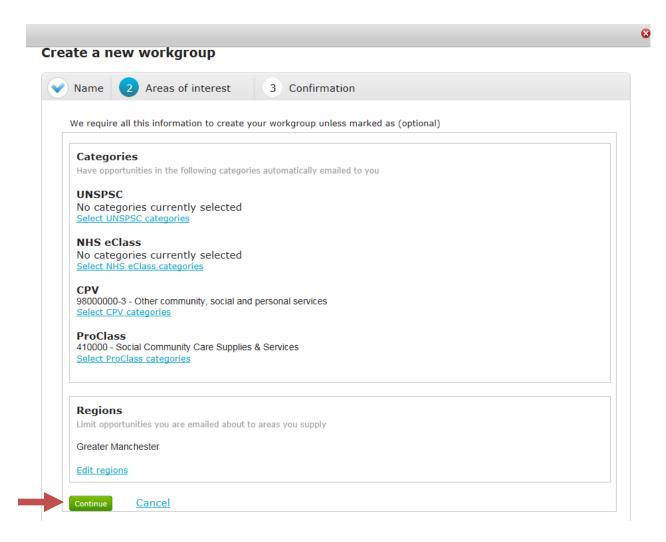
Region selection







Step 9 - Then click on 'Continue'

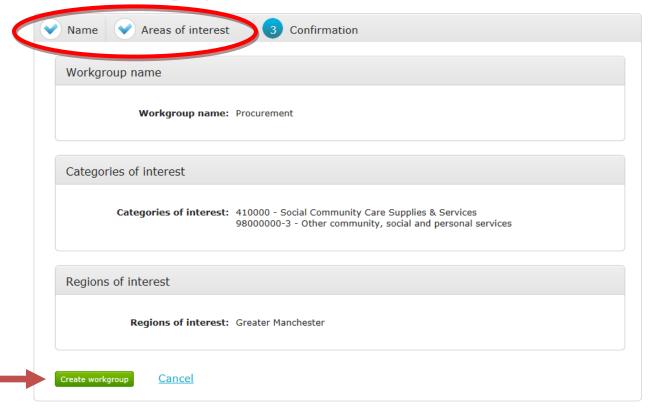




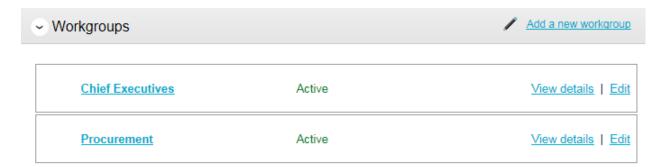


Step 10 - This will now show you a summary of what you have entered. Click on 'Create Workgroup' to confirm creation of the Workgroup. Should you require to change any of the information in the previous steps please click on the appropriate step circled below.

Create a new workgroup



Step 11 – The new workgroup will now be included as part of your workgroups list.







4. Contacts

In this section you can add a new contact on to your account. This is useful as more than one person will be able to pick up the notifications for different opportunities/tenders.

Step 1 – Select 'Add new contact'







Step 2 – Complete the details required shown below and select 'Continue'

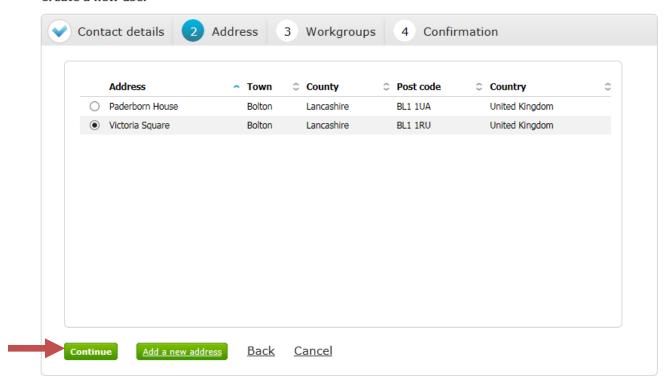
Contact details	2 Address 3 W	Vorkgroups	4 Confirmation
Title I	First name	Last name	
Mr	Irfan	Oomer	
Job title			
Senior Procureme	ent Off		
Telephone			
01204 333333			
Fax (optional)			
Mobile (optiona	ıl)		
mail address			
	ement@bolton.gov.ı		
	is only used to send you opport	unities you may b	be interested in.
Confirm email ad	ldress		
corporate.procure	ement@bolton.gov.ı		
Isername			
Irfanoomer	Available		
Continue	Cancel		





Step 3 – Select the address to link to the user and click on 'Continue'. If you wish to add a new address click on 'Add a New Address and follow the appropriate steps.

Create a new user







Step 4 – Select the appropriate Workgroup and the Access rights (optional) for the user. Please note the access rights displayed below are created by Due North. If you require further information about the definition of these please contact Due North.

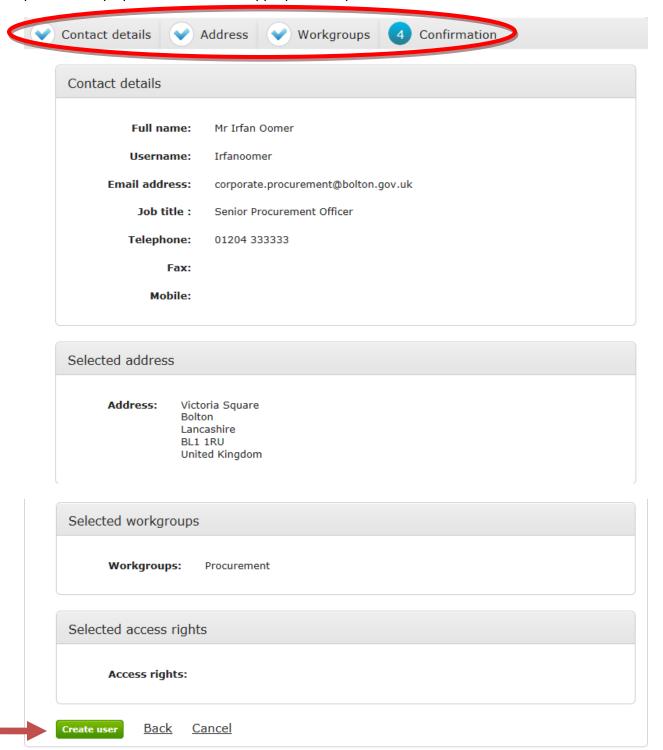
Click on 'Continue'

Create a new user Contact details **✓** Address Workgroups 4 Confirmation Workgroups Select all the applicable workgroups for this user. ☐ Chief Executives □ Procurement Access rights (optional) Select the access rights for this user. \square Contract account manager ☐ Workgroup Administrator ☐ Company Administrator <u>Back</u> <u>Cancel</u> Continue





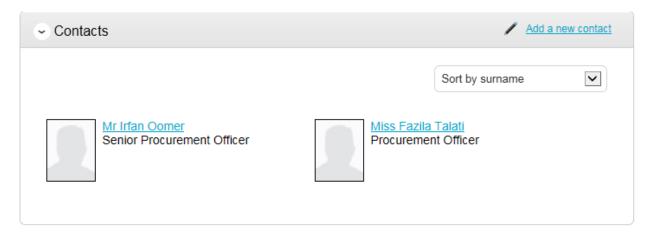
Step 5 - This will now show you a summary of what you have entered. Click on 'Create User' to confirm creation of Contact Details. Should you require to change any of the information in the previous steps please click on the appropriate step circled below







This will display the details of the new user created. The user will also receive email from Due North to confirm that an account has been created under your organisation with username and password details.



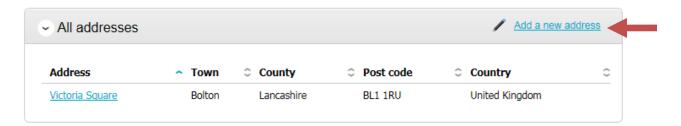




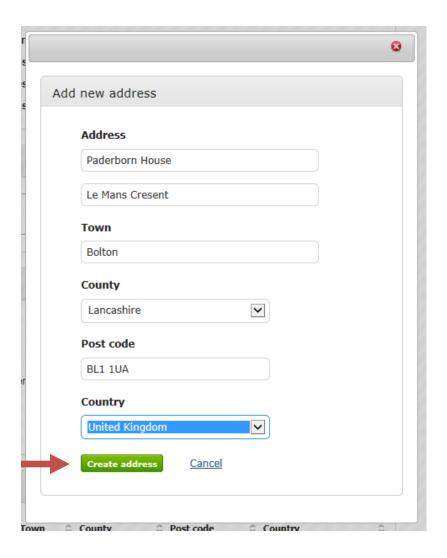
5. All addresses

In this section you can add more than one company address; this will be useful if you have more than one address for your organisation.

Step 1 – Select 'Add a new address'



Step 2 – Fill in the required information and select 'Create Address' as shown in the screenshot below.

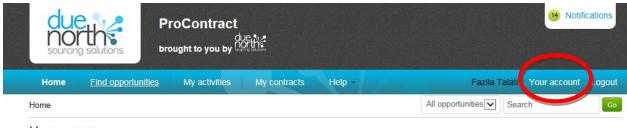






Edit Your Account Details

Should you wish to edit your Personal Account details, once logged in, navigate to the Home page and select 'Your account'



Home page

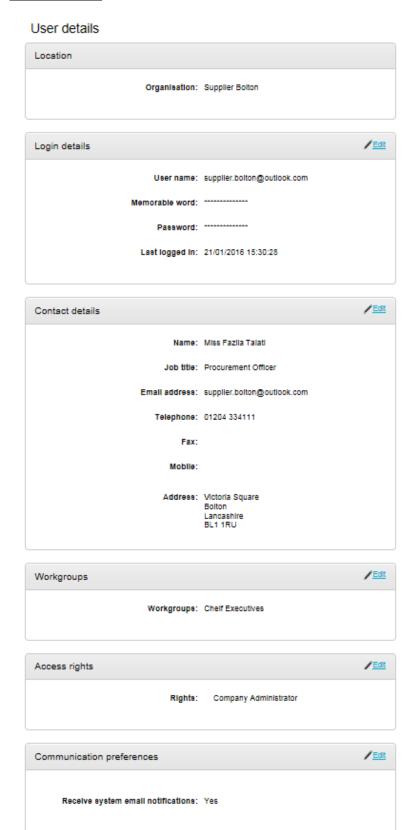
This will then bring you to the 'User details' page (**Screenshot 1**) which you will be able to change the following details;

- 1. Log in Details
- 2. Amend Contact Details
- 3. Choose Workgroups
- 4. Choose Access Rights
- 5. Communication Preferences

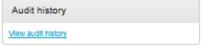




Screenshot 1











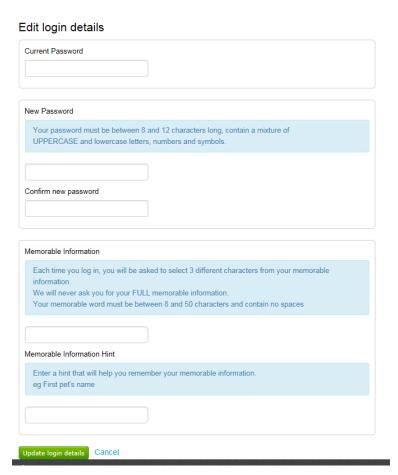
1. Log in details

In this Section you will be able to change your 'Memorable word' and 'Password'.

Step 1 - To do this, select 'Edit' as shown below.



You will then be bought to the 'Edit login details' page



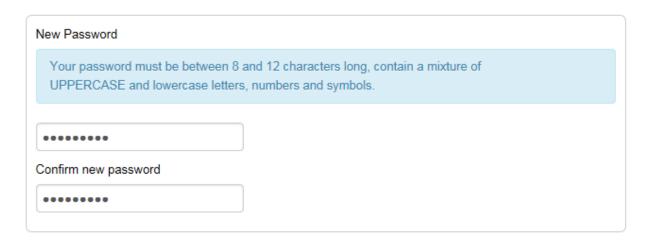




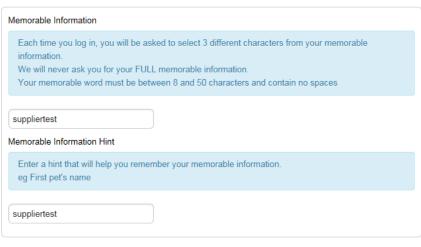
Step 2 - To change your Password you must first type in your Current Password



Step 3 – Then in the 'New Password' section type in your New password (don't forget the your new password contain a mixture of UPPERCASE and lowercase letters, numbers and symbols)



Step 4 – At this point, should you wish to **change** your **Memorable Information**, you can overwrite the default details and update. If you do NOT want to change your Memorable information please ignore and select 'update login details' at the bottom of the page as shown below





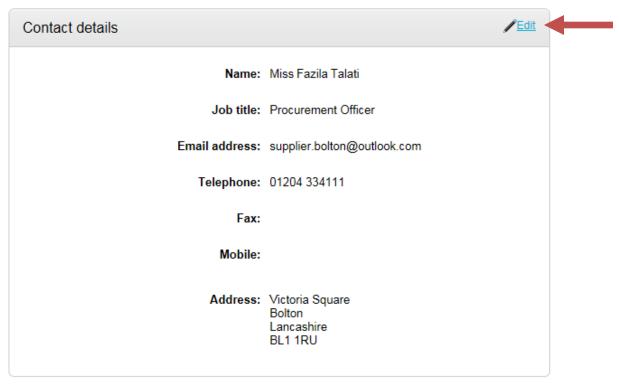
Update login details Cancel



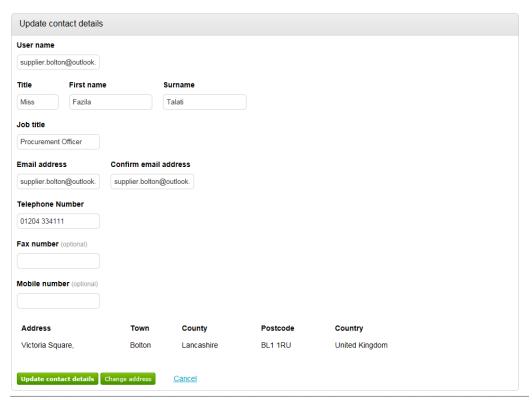
2. Contact Details

In this section you will be able to change your 'Contact details'.

Step 1 - To do this, select 'Edit' as shown below.



Step 2 – You will then be bought to the 'Update contact details' page whereby you will be able to change any details you require. Once you are happy with this select update contact details as shown below







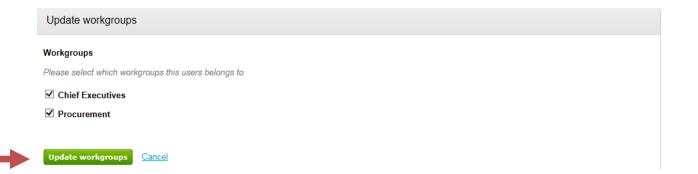
Workgroup

In this section you will be able to change your 'Workgroups'.

Step 1 - Click on 'Edit'.



Step 2 – Choose the Workgroup you wish to be selected against. You can choose more than one option. Click on 'Update Workgroups' to select.







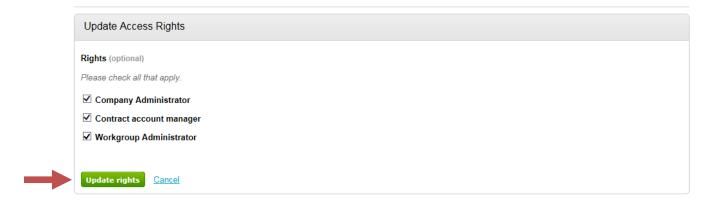
3. Access rights

In this section you will be able to choose Access Rights for the user.

Step 1 - Click on 'Edit'



Step 4 – Select the Access rights (optional) for the user. Please note the access rights displayed below are created by Due North. If you require further information about the definition of these please contact Due North. You can choose more than one option. Click on 'Update Rights' to select.







4. Communication Preferences

Should you wish to disable your email notifications for any alerts generated by The Chest i.e. tender, user account alerts etc you will be able to do this in the communication preferences section.

Step 1 - To do this, select 'Edit' as shown below



Step 2 – Select which preference (Yes or No) you wish to choose and then select 'Update'.

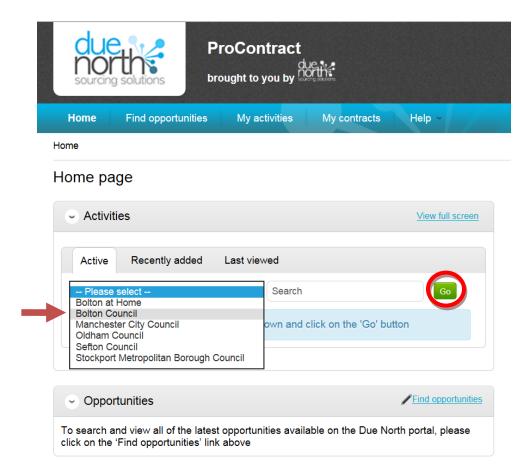






Accessing Previous Applications

Step 1 – Log in and Navigate to the Home Page. Under the 'Activities' section, click on the drop down arrow and select "Bolton Council" as shown below and then click "Go"



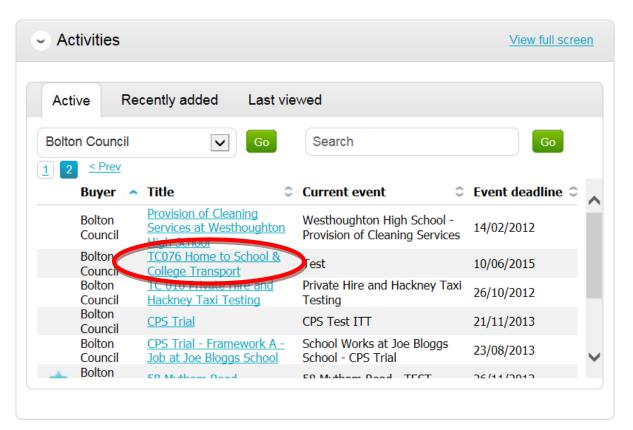




Step 2 – The 'Activities' section will then show you a list of Tenders you have previously submitted Documents for. Select the title of the Tender you wish to access your previous Documents from



Home page







Step 3 – This will then navigate you to the 'Activity' page of the particular Tender you have chosen. Under the 'Events Box' in the second section 'Submitted' select "Open"



Activity: TC076 Home to School & College Transport

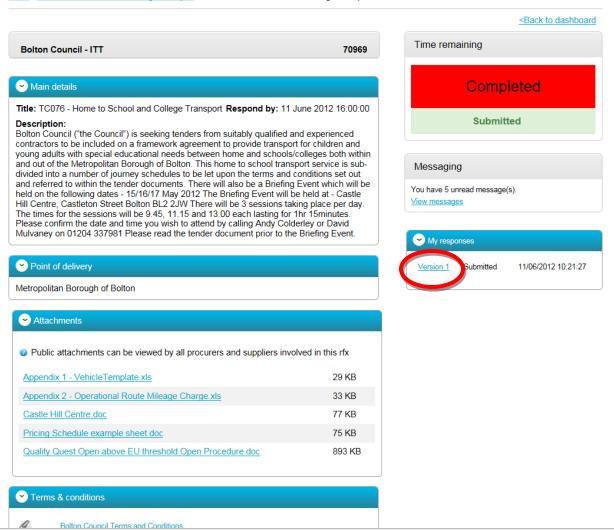
Events TC076 Home to School & College Expression of interest accepted View details | Open Transport TC076 - Home to School and College Submitted View details **Transport** Test Submitted View details | Open Draft (Respond by: 10/06/2015) Hide details | Open Test ITT Activity type: Reference: 64939 Respond by: 10 June 2015 at 16:00 Response status: Version 1 - Draft





Step 4 – The next page you will be navigated to will have the Documents you previously attached for this particular Tender. Under the 'My responses box' select "Version 1" as shown below

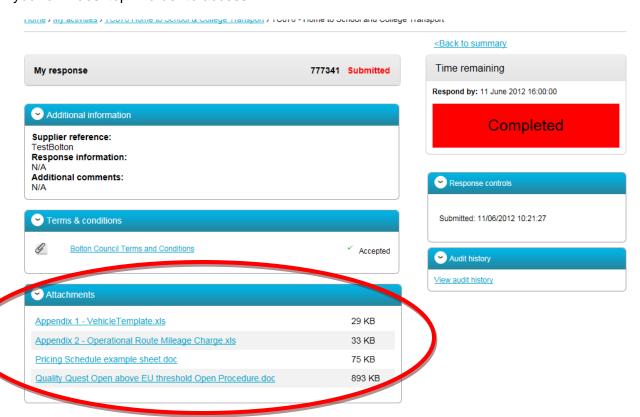
Home > TC076 Home to School & College Transport > TC076 - Home to School and College Transport







Step 5 – You will then be navigated to 'My response' page. Under the 'Attachments' section choose the Documents you want to view/save by clicking on the file name and save them on your own desktop in order to access



For any further assistance, please contact the support team on 01670 597137 or email support@due-north.com

