

New Supplier Onboarding Process

S2C – V20 Release 20.6

New Supplier On-Boarding process

Description

This release involves a rewrite of the supplier onboarding process, to make it simpler and more efficient. The following is an overview of the new process.

Basic registration

The revised basic registration is illustrated with a test supplier self-registering. The process would be the same if the supplier were invited to register by a buying organisation.

The sign-up option is unchanged.

English (United Kingdom) ▼

proactis

Supplier Network

Username (usually your email address)

Password

[Haven't got a Username?](#)
[Cannot access your account?](#)

Sign In

Sign Up?

Don't have an account? **Register**

Have you been invited?

Access Code **Go**

Tenders Direct

Opportunities

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 *

The activation link in the email will direct the user to the new process.

You have been sent this email because your Organisation has requested to be registered on the Supplier Network website. You must use the link below to activate your account within 7 days from the time that you submitted your Registration Request.

The details entered were:

Organisation Name: Orion Fabrications

Primary Contact Name: Tom Graham


Username: tom.graham@orion.com

Temporary Password: De3%i6-W_T


Supplier Network website URL: http://localhost:8083/

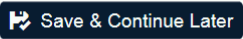
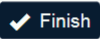
[Click here to activate your account](#)


The current tabbed approach is replaced by a single form with sections, which can be collapsed and expanded as required.



Self Registration


English (United Kingdom)

Tom Graham 
 Orion Fabrications

The form below will allow you to register and maintain your details, which may include personal data. You can follow these links to the Proactis policy documents at any point if you have any queries.

[Terms of Software Use](#)
[Privacy Policy](#)
[Cookie Policy](#)
[Contact Us](#)

Your changes will be saved as you close each section. Click the Save and Continue Later button to exit and provide more detail at a later stage if you wish.

Organisation Details	● Complete
Addresses and Users	● Incomplete
Product Classifications	● Incomplete
Buyers	● Incomplete
Notification Subscriptions	● Incomplete

This is the full list of email notifications, and they are all **disabled** at present. To be made aware of opportunities we recommend enabling those that are most relevant to you. Ongoing changes can be made via the 'Manage Preference' option from the dropdown menu.

☐ Select/Unselect all options here.

Help, language selection and the user menu are unchanged however there are a number of other updates.

Policy documents and the Contact Us options remain available throughout.


A Complete/Incomplete (Green/Red) indicator will make it clear to the user where updates are required, and the completion percentage is displayed at the bottom of the form.

20% Complete








Organisation Details

The user is invited to select their Country of Registration first. This will determine the subsequent display and validation of entered detail.

 Organisation Details
 ● Complete

You must fill in all questions with a * next to them.

Country of Registration *	UNITED KINGDOM		Organisation Type * 
Organisation Name *	Orion Fabrications		<input type="checkbox"/> Public Company
Registration Number 	2563212	<input type="checkbox"/> Not Applicable	<input type="checkbox"/> Limited Liability Company
Sales Tax Number 	GB56369123	<input type="checkbox"/> Not Applicable	<input type="checkbox"/> Partnership
DUNS Number 	265412563	<input type="checkbox"/> Not Applicable	<input type="checkbox"/> Sole Trader
Construction Industry Scheme (CIS) Details		<input type="checkbox"/> Limited Liability Partnership	
CIS Registration Type *	None	<input checked="" type="checkbox"/> Government Body	
		<input type="checkbox"/> Third Sector	
		<input type="checkbox"/> Other <input type="text"/>	

- The CIS section will only be displayed if United Kingdom is selected
- The Sales Tax number of EU states will be validated

The DUNS number entered will be validated as 9 numerics.

Clicking on ⓘ shows additional help.

Registration Number ⓘ The unique registration number provided by Companies House for the Company or LLP registered ☐ Not Applicable

VAT Number ⓘ ☒ Not Applicable

DUNS Number ⓘ DUNS stands for Data Universal Numbering System. It is a unique nine-digit numbering system that is used to identify a business. To find your DUNS number, please go to <http://smallbusiness.dnb.com> ☐ Not Applicable

An additional Organisation Type has been added for 'Other' and this can be selected in conjunction with the traditional types. If selected, some text must be entered to describe the organisation.

Organisation Type * ⓘ

☐ Public Company

☐ Limited Liability Company

☐ Partnership

☐ Sole Trader

☐ Limited Liability Partnership

☒ Government Body

☐ Third Sector

☒ Other X

If all details have been correctly entered, the user may navigate to a different section.

Addresses and Users

These sections have been combined and will initially display the initially registered detail. Search facilities have been added.

Addresses and Users ● Incomplete

Organisation Addresses

Search by address content 🔍 Search ➕ Add Address

Active	Primary	Invoice Address	Order Address	Remittance Address	Name	Address	Country	Postcode	Show Me
<input checked="" type="checkbox"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	Teasdale Works	McLaren Road, Ayr	UNITED KINGDOM	KA7 3RF	

1 - 1 of 1 Items

Organisation Users

Search by user content 🔍 Search ➕ Add User

Administrator	Username	Full Name	Email Address	Show Me
<input checked="" type="checkbox"/>	tom.graham@orion.com	Tom Graham	tom.graham@orion.com	

1 - 1 of 1 Items

To edit or delete the address, click on arrow icon under **Show Me** to the right of the address, this will expand the address details, click on **Edit** (with Pencil icon) to edit the details or **Delete** to delete the address.

You will always however need to maintain at least **ONE** primary address.

To add address(es), click on the **Add Address** button. You will need to enter all the mandatory fields with a * marked next to them.

The address types have been simplified, in particular to assist when integrating with financial application. As additional addresses are added, one must be identified as the:

- Invoice Address
- Order Address
- Remittance Address

Active	Primary	Invoice Address	Order Address	Remittance Address	Name	Address
<input checked="" type="checkbox"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Teasdale Works	McLaren Road, Ayr
<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	PO Box 97	Sileby Road, Loughborough

The same applies to **Organisation Users**, to edit or delete the user. Click on the arrow icon under **Show Me** to the right of the user, this will expand the user details. You can then click on the **Edit** (with Pencil icon) to edit the details or **Delete** to delete the user.

To add user(s), click on the **Add User** button. You will need to enter all the mandatory fields with a * marked next to them.

You will always however need to maintain at least **ONE** administrator user.

When adding a new user, the entered email address is proposed as the username on the basis that this is likely to be unique and easily remembered. The user may choose to change it, but the new value must be unique.

New User

Please be aware that you may be adding personal data which could be subject to privacy regulations

☐ Administrator

Email Address * ⓘ

rachel.cardy@orion.com

Username *

rachel.cardy@orion.com

Product Classifications

As part of your registration on the Supplier Network, the system allows you to add CPV classification code for the goods or services you supply to your customers.

The CPV codes are a standard category structure. It cannot be edited, if you cannot find an appropriate category, select a high-level category that are related to your goods or services supplied.

The left panel shows the products or services that are available. You may search for key words in the search bar, select the category by checking the tick box(es) on the left panel of the category code and description. You can select more than one category if applicable to your organisation.

After completing your selection, click on the **right arrow** to add to your profile. The right panel shows the categories that you have added.

The option to Skip the selection is available for any supplier that does not deem it necessary for their intended usage of the application.

Product Classifications
Incomplete
Skip

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. Please use the skip option if you do not wish to make a selection at this time.

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.

28000000 : Fabricated products and materials.

Available

☐ 28000000 : Fabricated products and materials [More...](#)

☒ 28100000 : Structural metal products.

☐ 28110000 : Metal structures and parts of structures.

☐ 28120000 : Builders' joinery of metal.

Added

☐ 28100000 : Structural metal products.

☐ 28200000 : Metal tanks, reservoirs and containers, central-heating radiators and boilers.

☐ 28500000 : Miscellaneous fabricated metal products and related items.

Buyers section

The **Buyers** section shows a list of available buying organisations for which you can request a relationship.

Title	Address	
Acme & Sons	West Yorkshire, Wetherby, LS22 6LE, UNITED KINGDOM	<input checked="" type="checkbox"/>

Notification Subscriptions

This will allow the user to select their required notifications. To respect privacy issues, the default will be unselected, however there is an option to select/unselect all if the user does not wish to accept the default.

☐ Select/Unselect all options here.

Notification Subscriptions

- ☐ 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

Once the registration is completed the subscriptions can be maintained via the user menu.

Complete Registration

When all sections have been completed the user can select Finish. If there are sections to complete the user can select 'Save and Continue Later'.

100% Complete Save & Continue Later Finish

The user can then select their own password and read and accept the terms and conditions.

A confirmation email is sent, and this now includes some instructions on how to manage the organisation on an ongoing basis.

You have been sent this email because your Organisation has just registered on the Supplier Network website. Any buying organisations that you have attempted to engage with are aware of your interest and may be in contact in due course.

To access the portal use the details below along with the password which was set during registration:

Organisation Name: Orion Fabrications
 Primary Contact Name: Tom Graham
 Username: tom.graham@orion.com
 Supplier Network website URL: http://localhost:8083/

If you have forgotten your password please [click here](#)

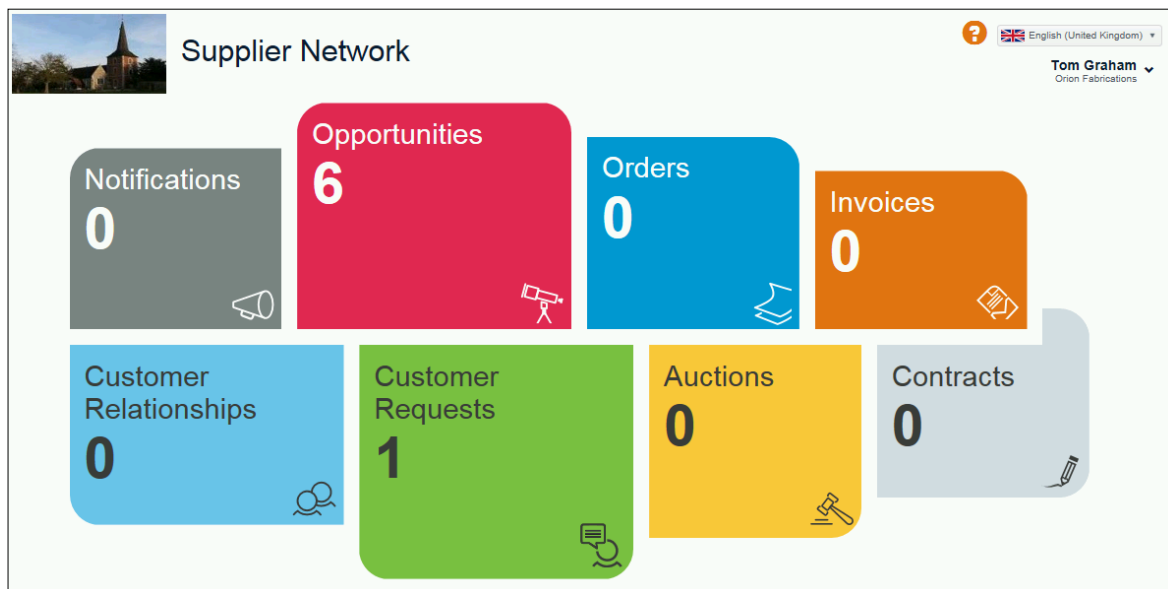
Once logged on, there are menu options to assist you in managing your details:

'Your Business' will allow details of your organisation and users to be kept up to date.
 'Manage Preferences' will allow updates to General and Opportunity Notifications, along with the setting of Accessibility options.

Additional sections

With initial registration complete, engagement requests from buying organisations can present the supplier with additional sections.

Customer Requests are accessed, as at present, via the green tile on the Home Page.



If the supplier user wishes to respond, an extended version of the new form is displayed. This will include previously provided detail, which can be updated as required.

The additional sections are as follows:

Geographical Regions

If the issuing buying organisation has created their own geographical regions, these are displayed, and the user can make their selection.

Questionnaire

If questions have been asked, these are displayed in their sections. The user may open each section and respond and can use the Validate button at any stage to check for any missing or invalid responses.

Documents

This will prompt the user to upload any documents required by the buying organisation. Depending on the configuration, this may require the completion of expiry dates and/or reference fields.

Documents Complete				
View & Upload Documents				
Document Name	Document Type	Mandatory	Uploaded	View/Upload
Sustainability policy 2020	Sustainability Policy	✓	✓	
Zurich Insurance Certificate	Public Liability Insurance Certificate	✓	✓	
				1 - 2 of 2 Items

Additional Information

This will prompt the user to respond to any reference field requirements.

Additional Information Complete	
Annual turnover (GBP): <input type="text" value="526,330"/>	Incorporation Date: <input type="text" value="17/07/1931"/>
CHAS Accreditation: <input type="text" value="Yes"/>	Payment Method: * <input type="text" value="Bank Deposit"/>

As with initial registration the user may save at any point or complete all sections and Finish.

Web Method updates

The new process involves the creation of a smaller data set, with the following no longer being captured:

- Address Contacts
- Address Types
- User Contact Type