



Supplier's User Guide



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1. Suppliers already registered on Proactis

When the National Trust advertise an opportunity relating to the goods/services you provide, you will receive an email from noreply@nationaltrust.org.uk notifying that you have been invited to take part in the tender process.

A notice has been issued.

You are receiving this email because a project has a corresponding CPV* code to those you included when you registered on Proactis.

Please log into the Proactis Portal and search for the National Trust in the Opportunities section to review and register your interest.

www.proactisplaza.com

Please do not contact the Purchasing Contact directly.

Please send all communications via the Messages tab in Proactis.

*CPV or Common Procurement Vocabulary Codes have been specially developed by the European Union as a classification system for public procurement and are the product / service codes used by Proactis.

[Click here](#) to unsubscribe from these emails.

Please note, this email has been sent from an unmonitored address.

Click the link in the email and log on to your Proactis account.

English (United Kingdom) ▼

proactis

Supplier Network

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

Sign In

Sign Up?

Don't have an account? [Register](#)

Have you been invited?

Go

Tenders Direct

Opportunities

Click on Notifications.



Look for - Your Organisation has been invited to take part in a tender process.

Then click the orange arrow on the right-hand side in the Show Me column.










Your Notifications


English (United Kingdom)

Rosie evans
TPSUPS

From here you can view your notifications and take action if needed.

Customer	Notification	Raised On	Show Me
The National Trust	The closing date for 'NT1000462' tender has changed	05/10/2018 09:29:25	
The National Trust	Your Organisation has been invited to take part in a tender process	05/10/2018 09:29:20	
The National Trust	The closing date for 'NT1000455' tender has changed	24/09/2018 15:59:57	
The National Trust	The closing date for 'NT1000455' tender has changed	21/09/2018 12:21:54	
The National Trust	Your Organisation has been invited to take part in a tender process	21/09/2018 12:21:49	
The National Trust	Your organisation has been issued a RFQ.	31/07/2018 11:21:32	
The National Trust	The closing date for 'NT1000399' tender has changed	22/08/2018 14:28:35	



The box below will appear. Click on the View button on the lower right-hand side of the box.

The National Trust Your Organisation has been invited to take part in a tender process 13/06/2019 14:09:11 

Your Organisation has been invited to take part in a tender process

Your organisation has been invited to take part in the following tender process:


Request Number: NT1000597
Request Title: TEST

Then click on the orange arrow under Show me, again.

NT1000597

Search Filters

Reference	Customer Name	Title	Type	Closing Date	Time Remaining	Show Me
NT1000597	The National Trust	TEST	Private	28/06/2019 00:00	14 days 9 hours	

The next page shows you the details of the opportunity.

2. Suppliers not registered on Proactis

If you have been advised by the National Trust of a new opportunity you will need to check the Opportunities tab on the Proactis website www.Proactisplaza.com

The screenshot shows the Proactis website interface. At the top center is the Proactis logo. To the right, there is a language dropdown menu set to "English (United Kingdom)". Below the logo, there are two main sections: "Supplier Network" and "Sign Up?".

The "Supplier Network" section contains a text input field for "Username (this is usually your email address)", a password input field, and a "Sign In" button circled in orange. Below the input fields, there is a link: "Haven't got a Username? Cannot access your account?".

The "Sign Up?" section contains a "Register" link, a "Have you been invited?" section with an "Access Code" input field and a "Go" button circled in orange.

On the right side of the page, there is a vertical navigation bar with two buttons: "Tenders Direct" and "Opportunities".

Click on the filter tab next to "Customer Name" and filter by "Contains" "National Trust" and this will show all available opportunities.




The screenshot shows a table titled "Public Opportunities" with a filter applied to the "Customer Name" column. The filter dropdown is open, showing "Contains" selected and "National Trust" entered in the search field. The table displays a list of opportunities with columns for Reference, Customer Name, Title, Published Date, Closing Date, Time Remaining, and Show Me. The "Show Me" column contains orange arrow icons.

Reference	Customer Name	Title	Published Date	Closing Date	Time Remaining	Show Me
REQ/1000165	Southampton City Council		23/03/2023 11:22	17/04/2023 12:00	2 hours 29 minutes	➔
RQST13879	Caerphilly County Borough Council		27/03/2023 15:18	17/04/2023 12:00	2 hours 29 minutes	➔
EREQ1004352	Torfaen County Borough Council		03/04/2023 11:48	19/04/2023 12:00	2 days 2 hours	➔
UOSREQ1000185	University of Sussex		21/03/2023 15:56	20/04/2023 12:00	3 days 2 hours	➔
GSC1000704REQ	Denbighshire County Council	Weed Spraying 2023-2026	06/04/2023 09:48	21/04/2023 12:00	4 days 2 hours	➔
RFX1000029	East Sussex County Council	ESCC - TP - 6949 Turner Prize Research Evaluation: Leave It To Us	30/03/2023 14:10	21/04/2023 12:00	4 days 2 hours	➔
RQST13899	Caerphilly County Borough Council	St Martins Comprehensive – Curtain walling	15/03/2023 12:03	21/04/2023 12:00	4 days 2 hours	➔
UOSREQ1000183	University of Sussex	US_22277 - 3D Metal Printer	15/03/2023 12:06	21/04/2023 12:30	4 days 2 hours	➔
REQ/1000144	Bank of England	Resolution Advisory Services Framework Agreement ("RPF2023")	17/02/2023 17:32	21/04/2023 16:00	4 days 6 hours	➔
RFX1000332	Surrey County Council	SCC APC Contract for a Transport Removals Service on Behalf of H.M. Coroner for Surrey	14/03/2023 09:55	21/04/2023 17:00	4 days 7 hours	➔

Once you have found the correct opportunity, click the orange arrow under Show Me.

From here you can review the requests that have been sent to you by customers and create responses.

National Trust Search Filters

Reference	Customer Name	Title	Type	Closing Date	Time Remaining	Show Me
NT1000903	The National Trust	TEST	Private	28/06/2019 00:00	14 days 8 hours	
NT1000581	The National Trust	Adaptive reuse of rural buildings	Private	04/07/2019 17:00	21 days 1 hour	
NT1000591	The National Trust	Adaptive reuse of rural buildings	Private	12/07/2019 17:00	29 days 1 hour	

You will then be able to read a brief description about the opportunity which should enable you to decide if you want to submit a response.

Public Opportunities x

[← Opportunities](#) ! To respond to an opportunity please register using the 'Sign up' link on the login page.

[Overview](#) [Documents](#)

Opportunity | NT1000359

Customer Name The National Trust	Closing Date 13 April 2018	Customer Contact Details -
Title Rosie supplier test	Contract Start Date -	Customer Address Central Office Heels Kemble Drive Swindon Wiltshire SN2 2NA UNITED KINGDOM
Contract End Date -		

Description

If you do wish to submit a response, please return to the sign in page and select Register below the Sign-up title.

Supplier Network

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

Sign In

Sign Up?

Don't have an account? [Register](#)

Have you been invited?

Go

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 *

Complete all fields as appropriate (those marked * are compulsory and must be completed before the system will allow you to continue.)

When you click Register you see the following Thank You confirmation.

Thank you

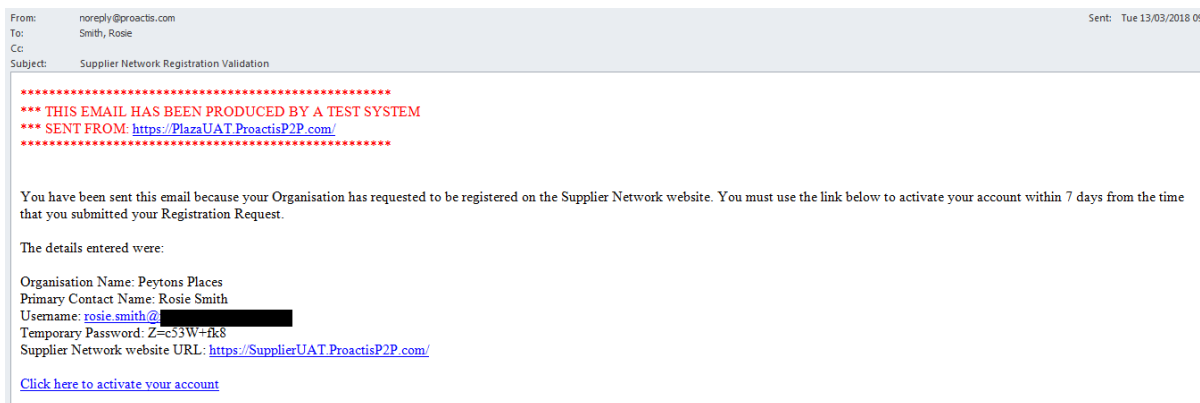
Your registration is being processed.

1. An activation email has been sent to the email address of your primary contact.
2. Click on the link contained within the email to activate your account.

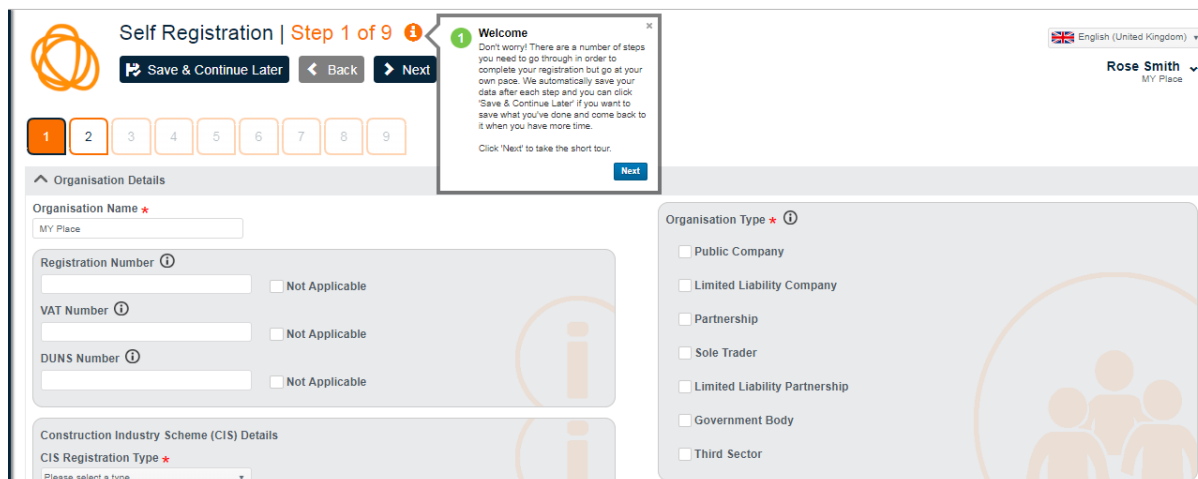
[Home](#)

You will also receive an email confirming your account set up with a temporary password and a link to complete the registration process.

Click the link at the bottom of the email to activate your account.



The pop-up window at the top of the screen provides an explanation of how to navigate through the self-registration process.



On page 4 you will need to select a classification.

(These classifications correspond to Common Procurement Vocabulary (CPV) codes which have been specially developed by the European Union as a classification system for public procurement and are the product / service codes used by Proactis.)

Self Registration | Step 4 of 9

Save & Continue Later Back Next

2 Navigation
Use these next and back buttons to go forward and back between steps. A * highlights any fields which must be completed before you can proceed to the next step.

1 2 3 4 5 6 7 8 9

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

Available

- 03000000 : Agricultural farming fishing forestry and related products.
- 09000000 : Petroleum products fuel electricity and other sources of energy.
- 14000000 : Mining basic metals and related products.
- 15000000 : Food beverages tobacco and related products.
- 16000000 : Agricultural machinery.
- 18000000 : Clothing footwear luggage articles and accessories.
- 19000000 : Leather and textile fabrics plastic and rubber materials.
- 22000000 : Printed matter and related products.
- 24000000 : Chemical products.
- 30000000 : Office and computing machinery equipment and supplies except furniture and software packages.
- 31000000 : Electrical machinery apparatus equipment and consumables; Lighting.
- 32000000 : Radio television communication telecommunication and related equipment.
- 33000000 : Medical equipments pharmaceuticals and personal care products.
- 34000000 : Transport equipment and auxiliary products to transportation.
- 35000000 : Security fire-fighting police and defence equipment.
- 37000000 : Musical instruments sport goods games toys handicraft art materials and accessories.

Added

Follow the instruction to Type some key words here describing what you sell and then click on the down arrow at the right-hand side

cleaning se

90000000 : Sewage- refuse- cleaning- and environmental services.

90600000 : Cleaning and sanitation services in urban or rural areas and related services.

90900000 : Cleaning and sanitation services.

90400000 : Sewage services.

98300000 : Miscellaneous services.

16600000 : Specialist agricultural or forestry machinery.

42900000 : Miscellaneous general and special-purpose machinery.

30100000 : Office machinery equipment and supplies except computers printers and furniture.

39200000 : Furnishing.

51500000 : Installation services of machinery and equipment.

31000000 : Electrical machinery apparatus equipment and consumables; Lighting.

Added

70000000 : Real estate

Select the classification that best fits what you do, tick the box next to it on the left-hand side and then click the blue arrow in the centre of the page to add your selection to the right-hand side.

You can select multiple options.

Self Registration | Step 4 of 9

Save & Continue Later Back Next

2 Navigation
Use these next and back buttons to go forward and back between steps. A * highlights any fields which must be completed before you can proceed to the next step.

1 2 3 4 5 6 7 8 9

92312000 : Artistic services.

Available

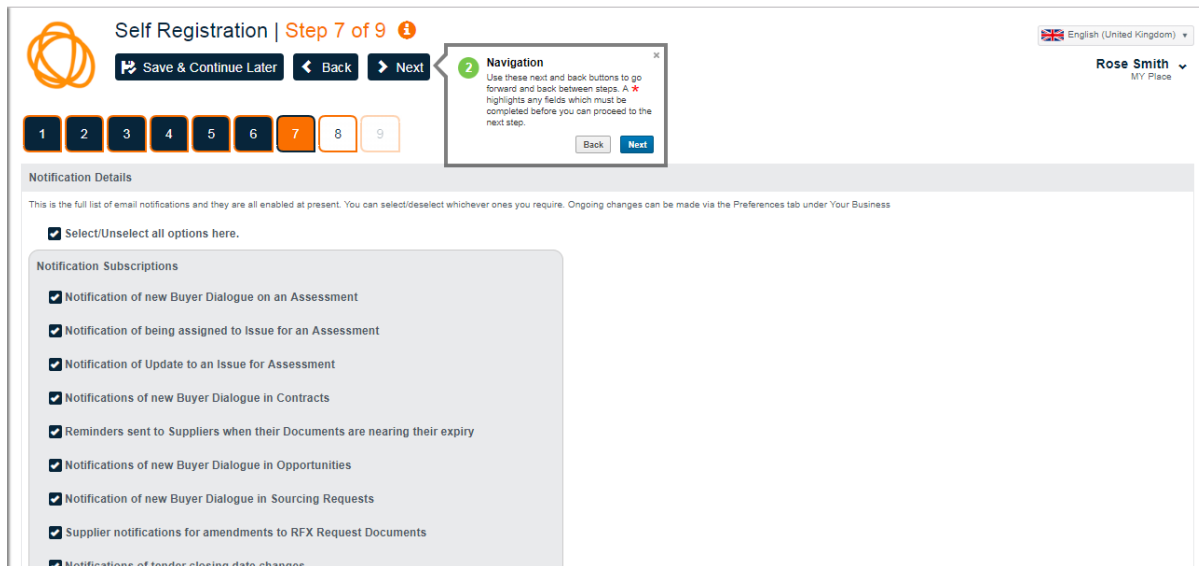
- 92000000 : Recreational cultural and sporting services. [More...](#)
- 92300000 : Entertainment services. [More like this...](#)
- 92310000 : Artistic and literary creation and interpretation services. [More like this...](#)
- 92312000 : Artistic services. [More like this...](#)
 - 92312100 : Theatrical producers' singer groups' bands' and orchestras' entertainment services.
 - 92312110 : Theatrical producer entertainment services.
 - 92312120 : Singer group entertainment services.
 - 92312130 : Band entertainment services.
 - 92312140 : Orchestral entertainment services.
 - 92312200 : Services provided by authors composers euphonists entertainers and other individual artists.
 - 92312210 : Services provided by authors.

Added

92312000 : Artistic services.

Page 5 asks you to select Buyer organisations – please note you will not find The National Trust listed here, please move onto page 6.

Page 7 allows you to select which email notifications you wish to receive following your registration.



Page 8 sets out the terms and conditions for using the Proactis portal.

If you are happy to continue tick the box and move onto page 9. If you are unhappy with the terms and conditions you will need to contact Proactis regarding any concerns that you have.

Page 9 asks you to set your own password. It must be 6 characters or more in length and must contain at least 2 numbers.

When you click “Complete registration” you will be taken to your home screen where you can view and register interest in any of the opportunities on the “Opportunities” tab.

You can then follow the instructions as given from page 11 of this guide.

3. Reviewing an opportunity and submitting a response

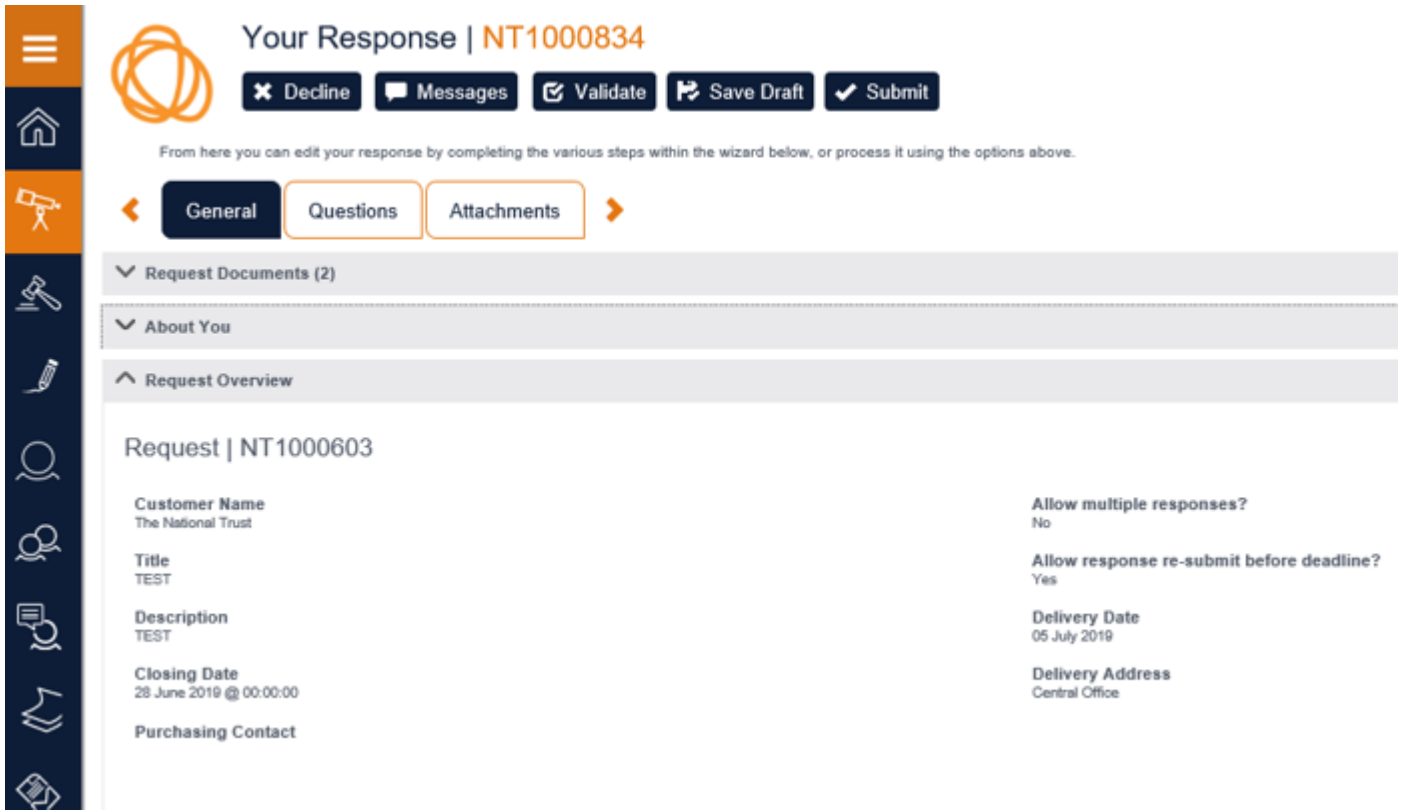
Search for National Trust in the search bar and this will show all available opportunities.

Once you have found the correct opportunity, click the orange arrow under Show Me.



Click on the arrow on the left of Request Overview to view the Description.

The Description gives you a summary of the opportunity and should contain enough detail for you to decide if you wish to submit a response.



Your Response | NT1000834

[Decline](#)
[Messages](#)
[Validate](#)
[Save Draft](#)
[Submit](#)

From here you can edit your response by completing the various steps within the wizard below, or process it using the options above.

[General](#)
[Questions](#)
[Attachments](#)

Request Documents (2)

About You

Request Overview

Request | NT1000603

Customer Name The National Trust	Allow multiple responses? No
Title TEST	Allow response re-submit before deadline? Yes
Description TEST	Delivery Date 05 July 2019
Closing Date 28 June 2019 @ 00:00:00	Delivery Address Central Office
Purchasing Contact	

Click on the arrow on the left of Request Documents to see attached documents relating to the opportunity. Click on the icon on the right-hand side to download the document.

Please ensure to read these documents carefully before submitting a query or your response.

Your Response | NT1000834

Decline Messages Validate Save Draft Submit

From here you can edit your response by completing the various steps within the wizard below, or process it using the options above.

General Questions Attachments

Request Documents (2)

Please ensure you read all documents before responding to opportunity request.

Name	Type	Download
A) The National Trust	Generic Documents	
B) Statement of Confidentiality	Generic Documents	

About You

Request Overview

If you do not wish to submit a response, please click on the Decline button.

Your Response | NT1000834

Decline Messages Validate Save Draft Submit

From here you can edit your response by completing the various steps within the wizard below, or process it using the options above.

General Questions Attachments

Request Documents (2)

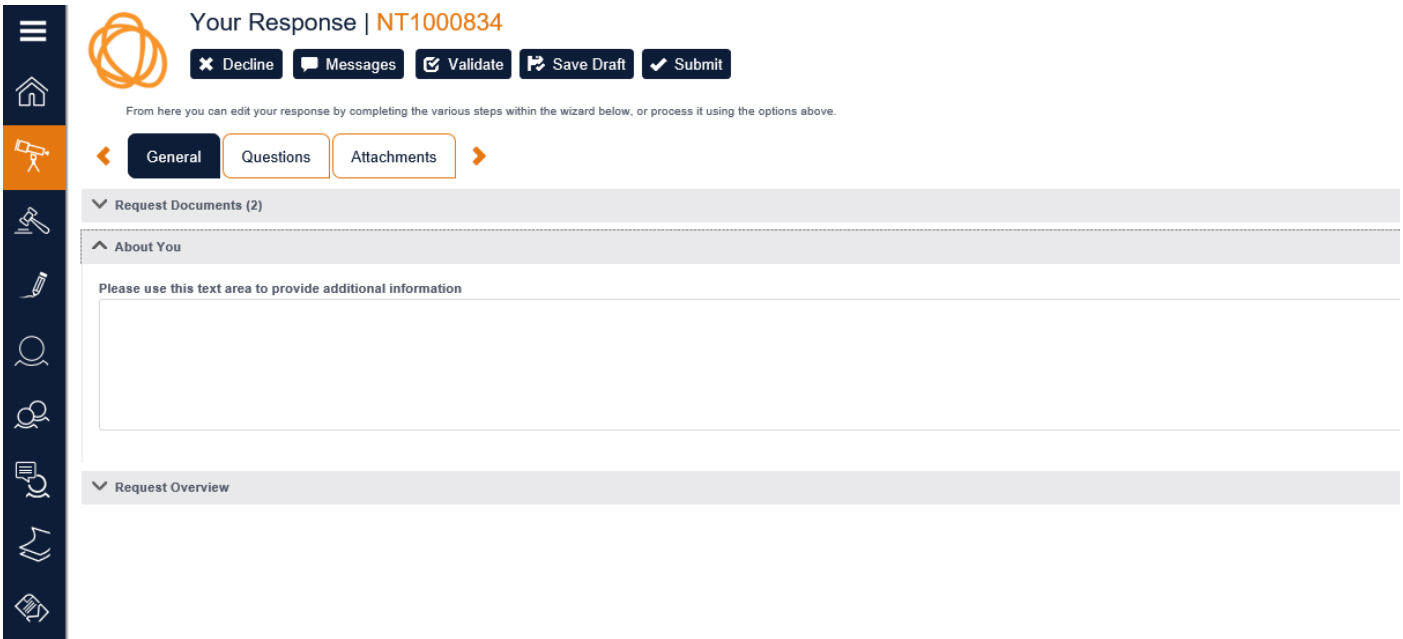
Please ensure you read all documents before responding to opportunity request.

Name	Type	Download
A) The National Trust	Generic Documents	
B) Statement of Confidentiality	Generic Documents	

About You

Request Overview

If you do wish to submit a response, please click on the arrow on the left of About You to add a brief description about your company.



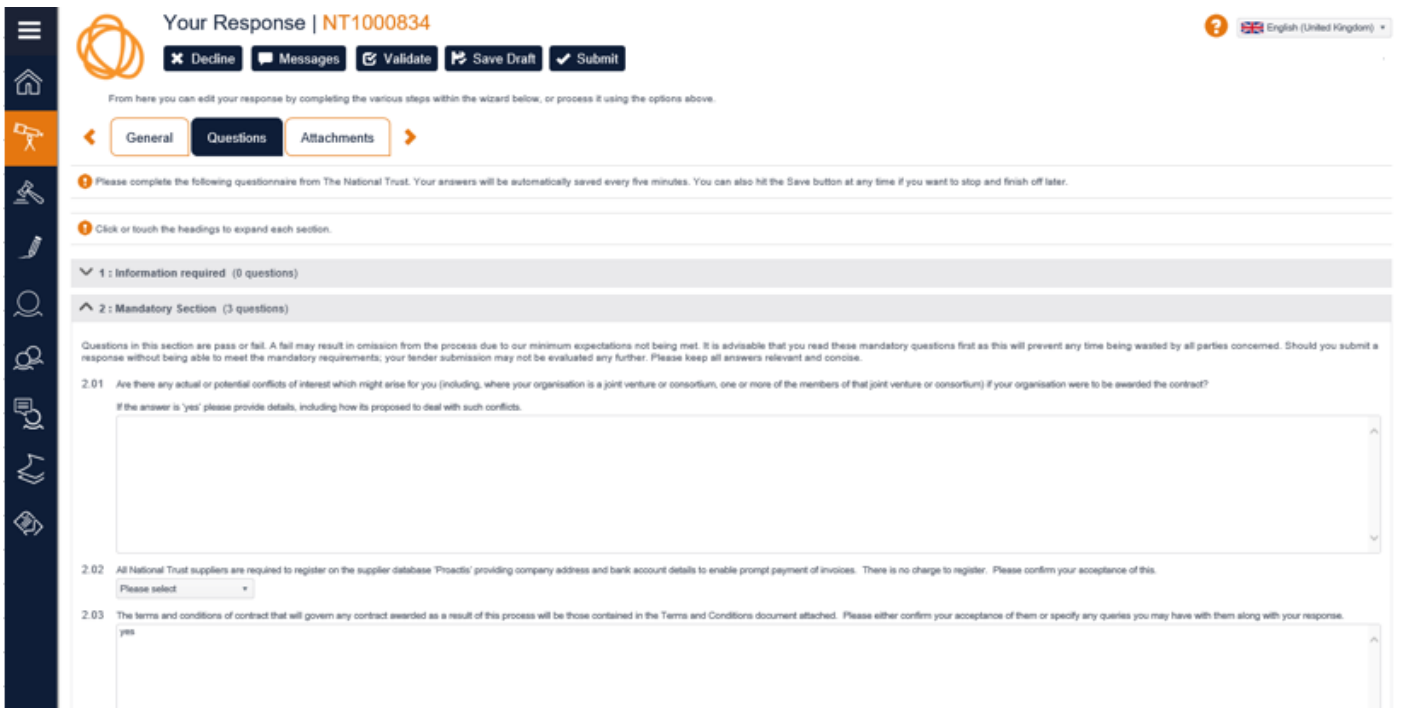
Click on the Questions tab.

This example shows there are 3 questions to complete.

Please note if there is an * next to a question this means it is mandatory and must be answered.

The full request document may have several questions. Some may need a mandatory answer, some may request that you upload documents and others may simply ask for more details.

Please ensure to check both the Information required and Mandatory sections and answer all questions.



Please note that Quick Quotes will have an Items tab instead of a Questions tab.

Click on the Items tab.

Here you will see listed the Items required for the Quick Quotes.

Your Quote | xxxxxxxxxxxxxxxx

Messages Validate Save Draft Submit

English (United Kingdom)

XXXXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXXXX

From here you can edit your response by completing the various steps within the wizard below, or process it using the options above.

General **Items** Attachments

Ref	Part Number	Name	UOM	Unit Price (GBP)	Quantity Requested	Quantity Supplying	Value (GBP)	Free Issue?
#1		TEST2	Each	0.00	1	1.00	0.00	<input type="checkbox"/>

1 - 1 of 1 Items

Click on ...More in Orange to read the Description of the Item.

Your Quote | xxxxxxxxxxxxxxxx

Messages Validate Save Draft Submit

English (United Kingdom)

XXXXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXXXX

From here you can edit your response by completing the various steps within the wizard below, or process it using the options above.

General **Items** Attachments

Ref	Part Number	Name	UOM	Unit Price (GBP)	Quantity Requested	Quantity Supplying	Value (GBP)	Free Issue?
#1		TEST2	Each	0.00	1	1.00	0.00	<input type="checkbox"/>

1 - 1 of 1 Items

Your Quote | xxxxxxxxxxxxxxxx

Messages Validate Save Draft Submit

English (United Kingdom)

XXXXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXXXX

From here you can edit your response by completing the various steps within the wizard below, or process it using the options above.







General **Items** Attachments


Ref	Part Number	Name	UOM	Unit Price (GBP)	Quantity Requested	Quantity Supplying	Value (GBP)	Free Issue?
#1		TEST2	Each	0.00	1	1.00	0.00	<input type="checkbox"/>

Description
TEST2

1 - 1 of 1 Items

Please enter your Unit Price, Quantity and Value. You can either type in the field or use the arrows to increase or decrease the figure.


Your Quote | XXXXXXXXXXXXXXXX

Messages Validate Save Draft Submit

English (United Kingdom)

XXXXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXXXX







From here you can edit your response by completing the various steps within the wizard below, or process it using the options above.


General Items Attachments

Ref	Part Number	Name	UOM	Unit Price (GBP)	Quantity Requested	Quantity Supplying	Value (GBP)	Free Issue?
#1		TEST2	-Less Each	0.00	1	1.00	0.00	<input type="checkbox"/>
		Description TEST2						

1 - 1 of 1 Items

Please note the Free issue? Box can be ticked where you wish to donate the item and don't need to enter prices.


Your Quote | XXXXXXXXXXXXXXXX

Messages Validate Save Draft Submit

English (United Kingdom)

XXXXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXXXX

From here you can edit your response by completing the various steps within the wizard below, or process it using the options above.

General Items Attachments

Ref	Part Number	Name	UOM	Unit Price (GBP)	Quantity Requested	Quantity Supplying	Value (GBP)	Free Issue?
#1		TEST2	-Less Each	0.00	1	1.00	0.00	<input checked="" type="checkbox"/>
		Description TEST2						

1 - 1 of 1 Items

Click on the Attachments tab.

Your Quote | XXXXXXXXXXXXXXXXXXXX

Messages Validate Save Draft Submit

English (United Kingdom)

XXXXXXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXXXXXX

From here you can edit your response by completing the various steps within the wizard below, or process it using the options above.

General Items Attachments

If required please use the options below to add Attachments to your response. Select an attachment type, add or drag and drop a file and then click 'Upload files'.

Your Files

Attachment Type

Select a type...

Attach files... Or drag and drop files here

Uploaded Files

Name	Type	Download	Remove
No items to display			

Here you can attach and requested documents in relation to the opportunity.

Select the attachment type from the drop-down menu.

Your Quote | XXXXXXXXXXXXXXXXXXXX

Messages Validate Save Draft Submit

English (United Kingdom)

XXXXXXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXXXXXX

From here you can edit your response by completing the various steps within the wizard below, or process it using the options above.

General Items Attachments

If required please use the options below to add Attachments to your response. Select an attachment type, add or drag and drop a file and then click 'Upload files'.

Your Files

Attachment Type

Select a type...

Select a type...

Generic Documents

Health and Safety Policy

Public Liability Insurance Certificate

Or drag and drop files here

Uploaded Files

Name	Type	Download	Remove
No items to display			

Click on the paperclip button with Attach files.

Or drag and drop the files as indicated.

****Please note you MUST then click on the Upload files button.****

If you don't follow this step your documents will not be attached to your submission.

You will be able to see successfully loaded files in the Uploaded Files section.

Please then click the Save Draft button.

The screenshot shows the 'Your Quote' interface. At the top, there is a header with a logo, the text 'Your Quote | XXXXXXXXXXXXXXXXXXXX', and a language dropdown set to 'English (United Kingdom)'. Below the header are four buttons: 'Messages', 'Validate', 'Save Draft', and 'Submit'. A red arrow points to the 'Save Draft' button. Below the buttons is a navigation bar with three tabs: 'General', 'Items', and 'Attachments'. The 'Attachments' tab is selected. Below the navigation bar is a message: 'If required please use the options below to add Attachments to your response. Select an attachment type, add or drag and drop a file and then click 'Upload files!'.' Below this message is the 'Your Files' section, which includes an 'Attachment Type' dropdown set to 'Generic Documents' and an 'Attach files...' button. Below the 'Attach files...' button is a large grey area with a download icon and the text 'Or drag and drop files here'. Below this area is the 'Uploaded Files' section, which contains a table with the following data:

Name	Type	Download	Remove
Generic Documents	Generic Documents		

At the bottom of the 'Uploaded Files' section, there is a red arrow pointing to the '1' in the pagination controls. The pagination controls show '1 - 1 of 1 Items'.

Once you have finished your answers it is good practice to validate your responses by clicking the Validate button at towards the top of the screen.

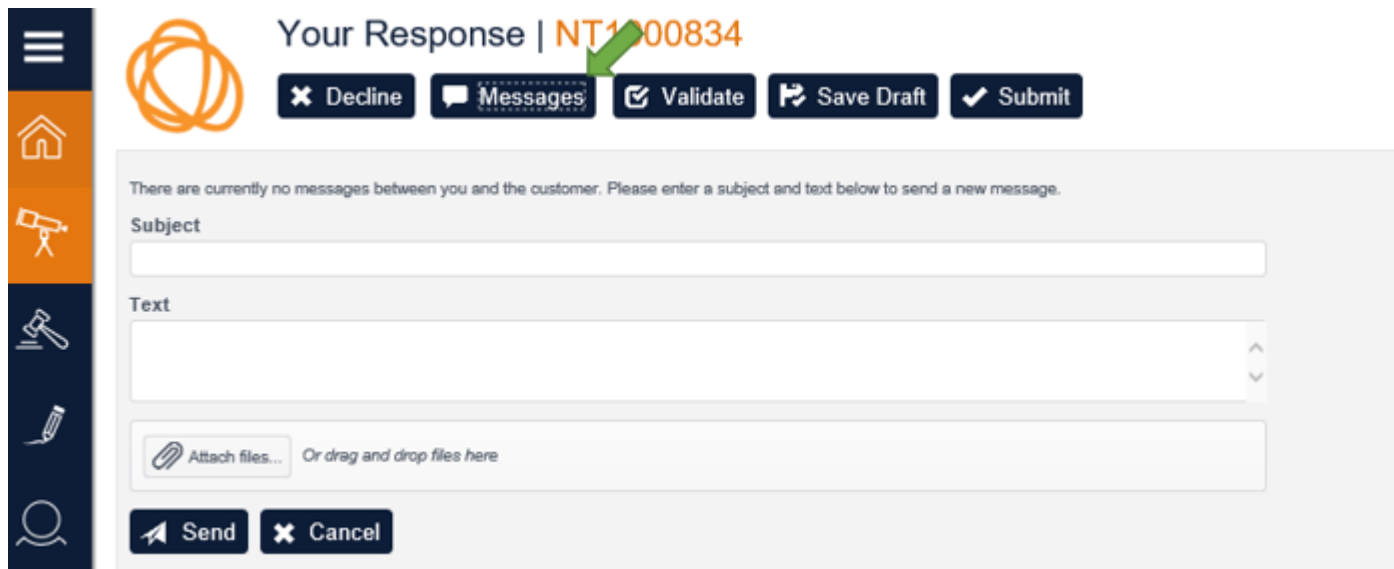
The screenshot shows the 'Your Response' interface. At the top, there is a header with the text 'Your Response | NT1000834'. Below the header are five buttons: 'Decline', 'Messages', 'Validate', 'Save Draft', and 'Submit'. A green arrow points to the 'Validate' button.

The system will then check that you have answered all mandatory questions and highlight any that are missing. Once you are happy with your responses you can then click "Submit" which will then electronically pass your responses to the National Trust to review.

If you need to get more information before submitting your proposal you can save the responses, you have completed by clicking the "Save as Draft" button and complete it later.

You also have an option to send a message if you need any clarification on the request.

Click the Messages button towards the top of the screen.

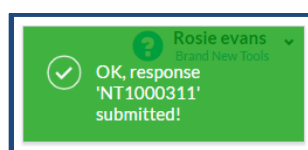


Please note all replies and any further communication will also be issued through the Messages tab in Proactis. It is the bidder's responsibility to access these emails on a regular basis to ensure they have sight of all relevant information applicable to the opportunity. Please ensure to read the Description and all attached documents carefully before submitting your queries. Queries not related to the project will not be replied to.

Any expressions of interest received outside the Proactis Messages system will not be accepted or considered further for this opportunity.

*Please do not contact the Purchasing Contact directly. *

Click Send to submit and you will see a confirmation box appear in the right-hand corner of the screen.



You will also receive an email which will give you details of the request number and your response number.

4. How to amend your details in Proactis

If you need to amend any of the details on your account, **YOU MUST** log into your account and make the amendments.

The National Trust is unable to reset either the password or the email details - this must be done by Proactis.

For security and fraud prevention reasons NO ONE within the National Trust can make these amendments for you.

To get to the sign in page go to <https://supplierlive.proactisp2p.com/account/login> the following page will be displayed.

The screenshot shows the Proactis login interface. The 'Supplier Network' section includes a 'Sign In' button circled in orange. Above the login fields, a red oval highlights the links 'Haven't got a Username?' and 'Cannot access your account?'. The 'Sign Up?' section includes a 'Go' button circled in orange. A vertical sidebar on the right contains 'Tenders Direct' and 'Opportunities' buttons.

You need to input the registered email address and the password that created when you registered.

If you have forgotten the password, you need to click the Cannot access your account? link to submit a request to Proactis to get this reset.

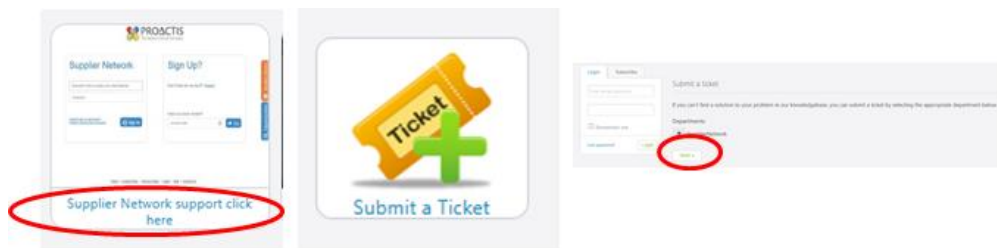
If the administrator has left or password is not available, you will need to raise a support request by clicking on the Help button at the bottom left hand side.

The screenshot shows the 'Cannot access your account' dialog box. It contains a heading 'Forgot your password or sign in details?', a sub-heading 'We will send you your details along with password reset instructions to the email address linked to the username that you enter below.', a 'Username' input field, and a link 'I don't know my Username'. At the bottom, there is a 'Need help?' section with a 'Help' button circled in red, and 'Send' and 'Cancel' buttons.

Then select Supplier Network support.

Submit a Ticket.

Then click Next.



Complete all the details requested on the next page and click submit at the bottom of the page. Proactis will contact you with your new log on details.

To Amend the Email Address for Purchase Orders

From the home screen, click on the black down arrow next to your Company name on the top right-hand side of the screen and select Your Business from the list.

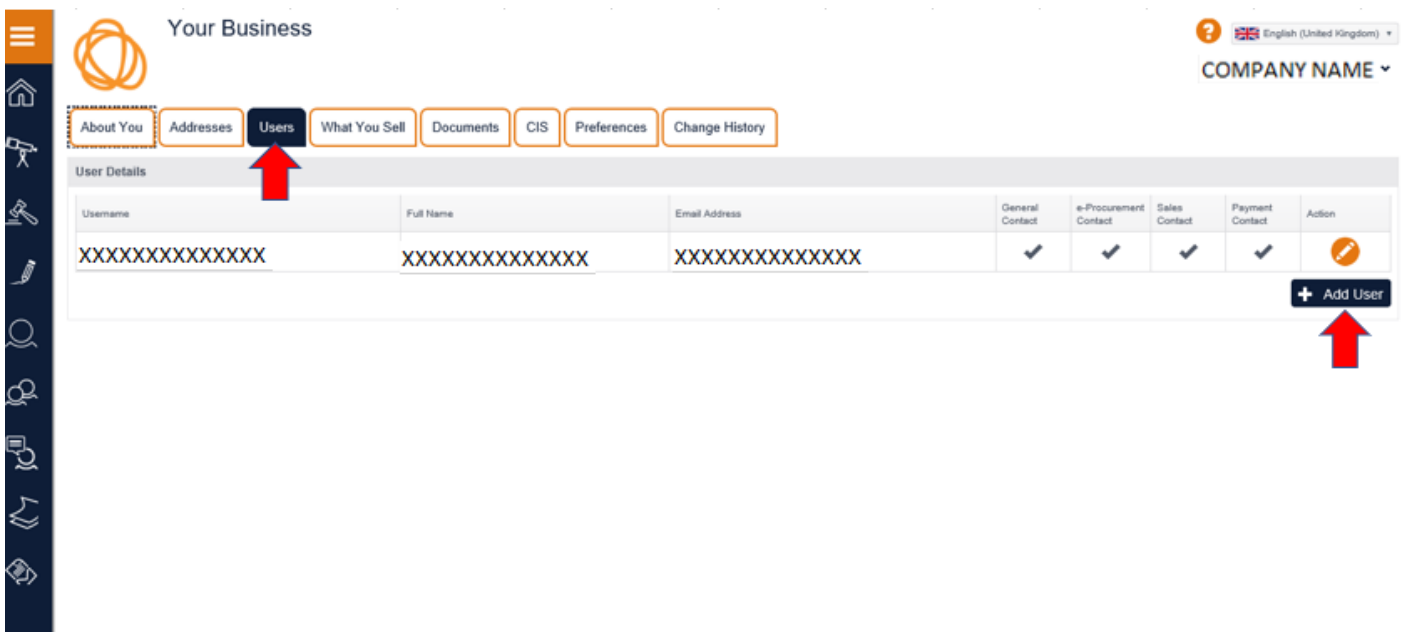


To add additional Users

From the home screen, click on the black down arrow next to your Company name on the top right-hand side of the screen and select Your Business from the list.



Click on Users Button at the top of the page, then click on Add User button on the lower right-hand side of the page.



Add/Amend User

User Details **Contact Type**

Email Address *

Telephone Number *

First Name *

Mobile Number

XXXXXXXXXXXXXXXXXXXXXXXXXXXX

User is an Administrator ⓘ

Username same as Email address

Language
English (United Kingdom)

✓ OK ✗ Cancel

Click on the Contact Type button.

You can then select which areas you would like the user to receive notifications about.

Once you have selected/de-selected please click the OK button.

Add/Amend User

User Details **Contact Type**

General contact

Sales contact

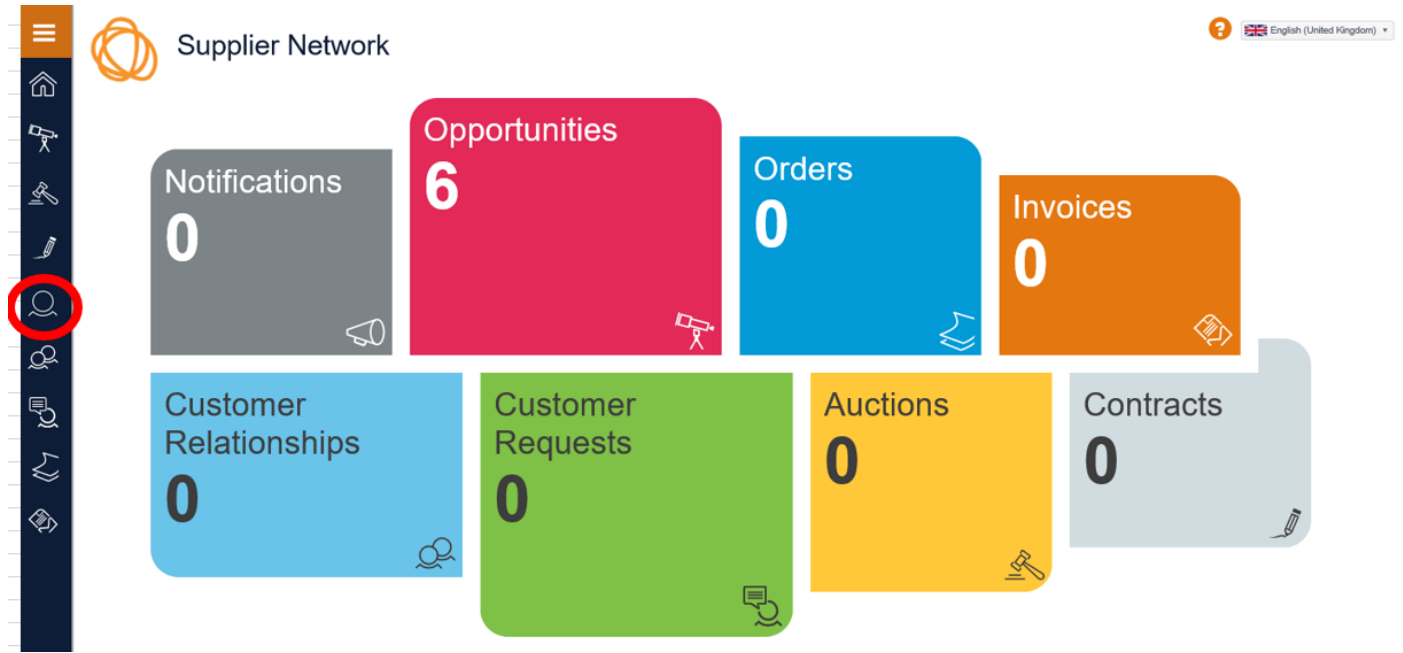
Payment contact

E-procurement contact

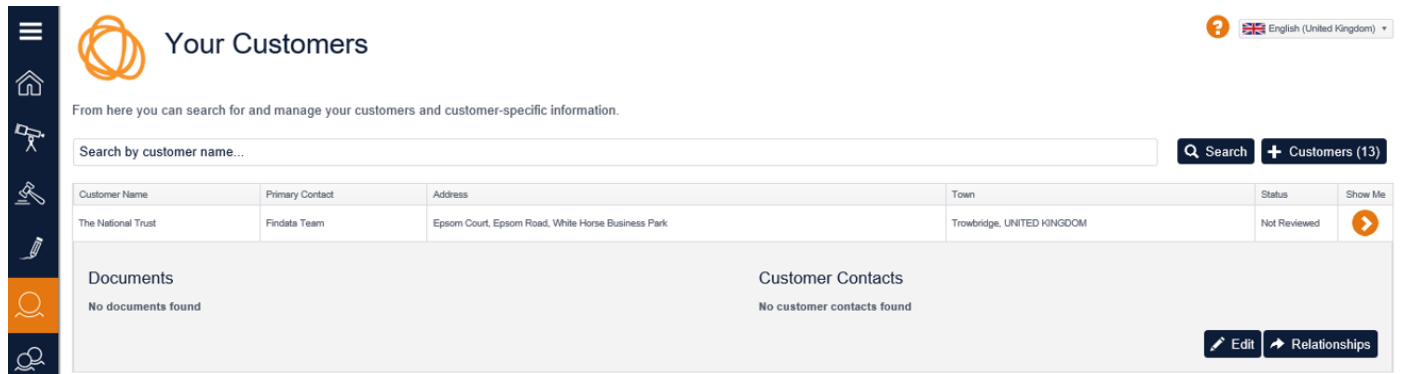
✓ OK ✗ Cancel

To amend bank details

From the home screen click on the Customer icon on the left-hand side tool bar.



A list of your Customers will be shown.



Look for The National Trust on your customer list.

Then select Edit toward the bottom left-hand side of the screen.

Edit Customer Information

From here you can amend customer specific information for The National Trust.

Categories Geographies **Additional Data**

Additional Data

Remittance Email: *

UK Bank Sort Code: Please enter 6 digits with no dashes or spaces (e.g. 309875) If you are a foreign supplier without a UK bank account and wish payments to be made to a foreign account please enter 000000.

UK Bank Account: Please enter 8 digits (e.g. 00123456) If you are a foreign supplier without a UK bank account and wish payments to be made to a foreign account please enter 00000000.

UK Building Society Roll Number: Please add if appropriate. Please leave field blank if not required - do not add N/A or anything other than a Building Society Roll Number.

If you want payments to be made to a foreign bank please supply your IBAN number. Please leave field blank if not required - do not add N/A

If you want payments to be made to a foreign bank please supply your SWIFT code. Please leave field blank if not required - do not add N/A

If you want payments to be made to a foreign bank please supply your bank account number. Please leave field blank if not required - do not add N/A

If you want payments to be made to a foreign bank please supply the bank's address. Please leave field blank if not required - do not add N/A

Click on Additional Data and amend the details as required.

To Amend Geographies

From the home screen click on the Customer icon on the left-hand side tool bar.

Supplier Network

Notifications 0

Opportunities 6

Orders 0

Invoices 0

Customer Relationships 0

Customer Requests 0

Auctions 0

Contracts 0

A list of your Customers will be shown.

From here you can search for and manage your customers and customer-specific information.

Search by customer name...

Search + Customers (13)

Customer Name	Primary Contact	Address	Town	Status	Show Me
The National Trust	Findata Team	Epsom Court, Epsom Road, White Horse Business Park	Trowbridge, UNITED KINGDOM	Not Reviewed	➔

Documents
No documents found

Customer Contacts
No customer contacts found

Edit Relationships

Look for The National Trust on your customer list.

Then select Edit toward the bottom left-hand side of the screen.

Edit Customer Information

Back Save

From here you can amend customer specific information for The National Trust.

Categories Geographies Additional Data

Available Added

- SW: South West
- LSE: London and South East
- NOR: North
- EE: East of England
- MID: Midlands
- WT: Whole Trust
- WAL: Wales
- NI: Northern Ireland
- NAT: National
- NW: North West
- MD: Midlands
- YNE: Yorkshire and North East
- WA: Wales
- NAT2: National Excluding NI

Select Geographies Tab.

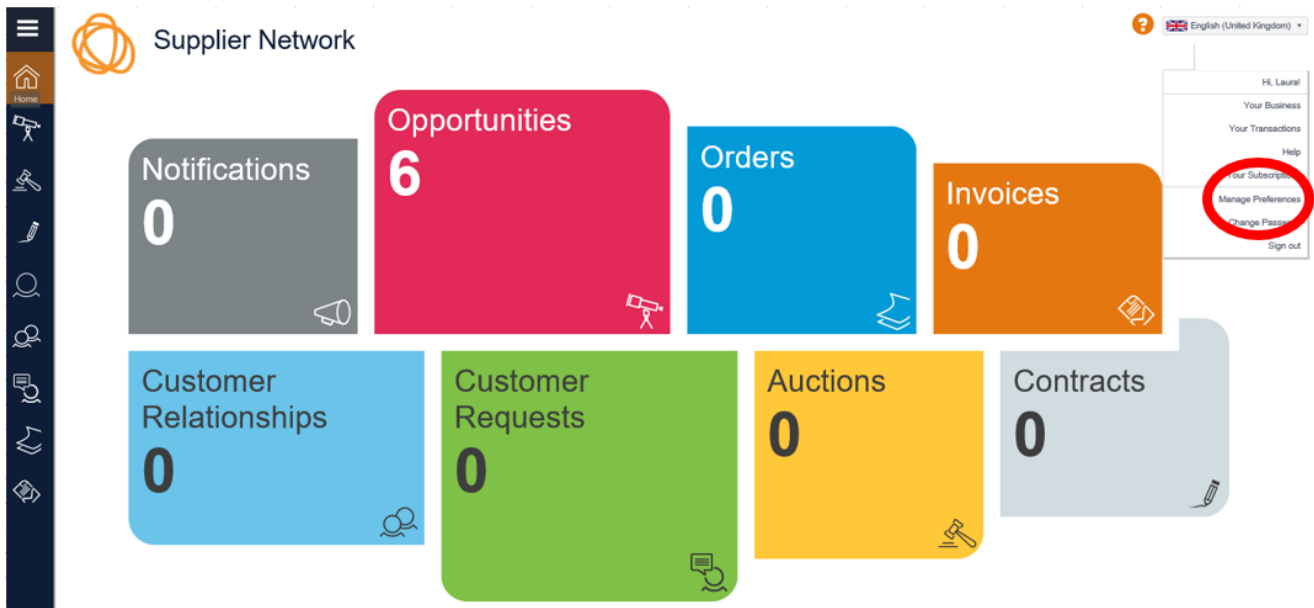
To delete a geographical area – tick the box next to the area in the “Added” section - Select arrow pointing left to remove.

To add a geographical area – tick box next to area in “Available” section – select arrow pointing right to move to “added” section.

To Amend the Email Preferences

From the home screen, click on the black down arrow next to your Company name on the top right-hand side.

Then select Manage Preferences.





Your Preferences

 Save

General Notifications

Opportunity Notifications

Accessibility

Notification Subscriptions

From here, you can opt in or out of receiving notifications.

- 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
- Notifications of being Approved/Rejected for Trading Relationships
- Notifications of being Suspended/Reinstated by Buyers for specific Trading Relationships
- Notifications of being Suspended/Reinstated by Buyers
- Notification of accelerated payment potential
- Email of an available Invoice

On the General tab you can untick any of the boxes you don't want to receive notifications about.

You can do the same on the Opportunity Notifications tab.

On the Accessibility tab you can amend the length of time pop up notifications are visible for.