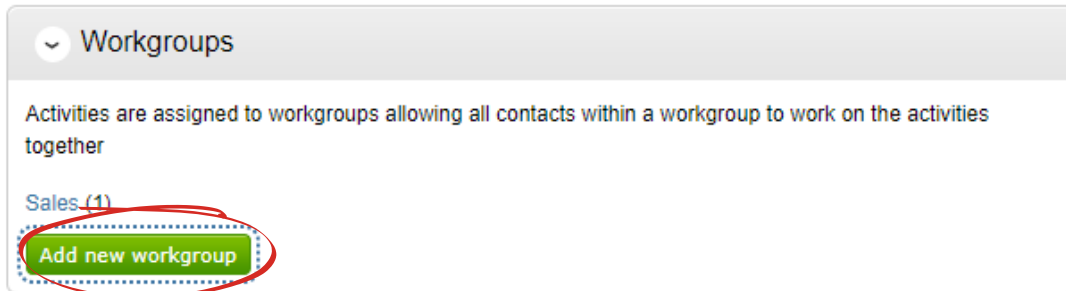


USING PROACTIS AS A SUPPLIER: SETTING UP A WORKGROUP

On the Homepage select 'Add new workgroup' in the bottom right corner.



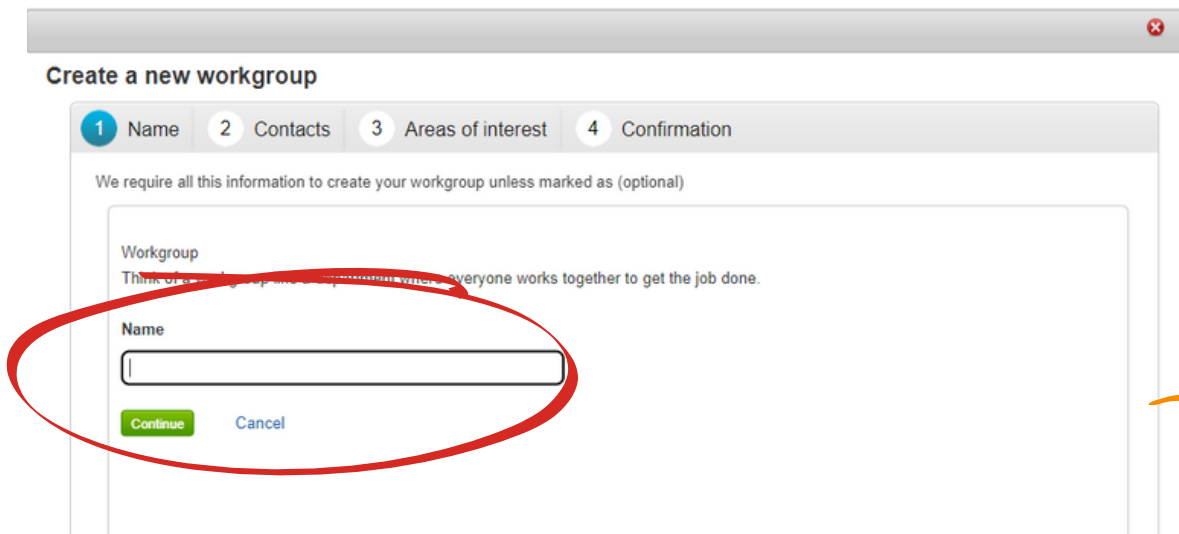
Workgroups

Activities are assigned to workgroups allowing all contacts within a workgroup to work on the activities together

Sales (1)

Add new workgroup

A pop-up will appear with steps to follow to create a new workgroup. First, choose a name e.g. Sales. Either add an existing contact, or create a new one.



Create a new workgroup

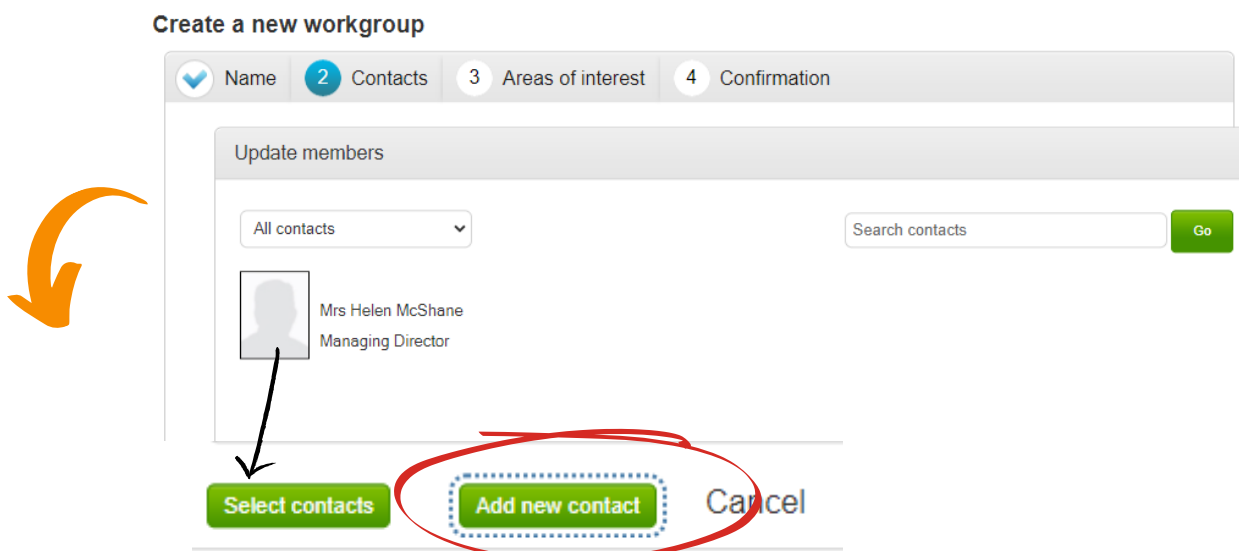
1 Name 2 Contacts 3 Areas of interest 4 Confirmation

We require all this information to create your workgroup unless marked as (optional)

Workgroup
Think of a workgroup as a team. Everyone works together to get the job done.

Name

Continue Cancel




Create a new workgroup

1 Name 2 Contacts 3 Areas of interest 4 Confirmation

Update members

All contacts

Search contacts **Go**

 Mrs Helen McShane
Managing Director

Select contacts **Add new contact** Cancel

Create a new user

1 Contact details 2 Address 3 Workgroups 4 Confirmation

Title First name Last name

Job title

Telephone

Fax (optional)

Mobile (optional)

Email address

Your email address is only used to send you opportunities you may be interested in.

Confirm email address

Username

Fill in the New Contact's details and address

Create a new user

1 Contact details 2 Address 3 Workgroups 4 Confirmation

Address Town County Post code Country

Address: Ross Road West Town: Stanley County: Other (Non-UK) Post code: FIQQ 1ZZ Country: Falkland Islands

Continue Add a new address Back Cancel

Now it will ask you to add the contact to an existing workgroup, (you can still make new workgroups after this) and choose what access rights they will have within that workgroup.

Create a new user

1 Contact details 2 Address 3 Workgroups 4 Confirmation

Workgroups

Select all the applicable workgroups for this user.

☐ Sales

Access rights (optional)

Select the access rights for this user.

☐ Contract account manager

☐ Workgroup Administrator

☐ Company Administrator

Continue Back Cancel

Create a new user

1 Contact details 2 Address 3 Workgroups 4 Confirmation

Contact details

Full name: Mr Alex McShane

Username: AMCS

Email address: Amcshane@sec.gov.fk

Job title: Sales Manager

Telephone: 27044

Fax:

Confirm the details to continue...

This returns you to 'Create a new workgroup'. Select the user you wish to add to the new work group (a green tick will appear) and 'Select contacts'.

Create a new workgroup

1 Name 2 Contacts 3 Areas of interest 4 Confirmation

Update members

All contacts Search contacts Go

Mrs Helen McShane
Managing Director

Mr Alex McShane
Sales Manager

Ms Helen Davies
Accountant

Select contacts

Just like when you registered on the system, you need to 'Select CPV categories' that will be applicable to this particular user/their responsibility. Use the search function to find and select the categories.

Create a new workgroup

1 Name 2 Contacts 3 Areas of interest 4 Confirmation

We require all this information to create your workgroup unless marked as (optional)

Categories
Have opportunities in the following categories automatically emailed to you

UNSPSC
No categories currently selected
Select UNSPSC categories

NHS eClass Version 2014
No categories currently selected
Select NHS eClass Version 2014 categories

CPV
No categories currently selected
Select CPV categories

ProClass
No categories currently selected
Select ProClass categories

Proc HE
No categories currently selected
Select Proc HE categories

CPV category selection

Search categories

Enter the search criteria... Search Exact match Fuzzy search

Categories list

- ☐ 03000000-1 - Agricultural, farming, fishing, forestry and related products
- ☐ 09000000-3 - Petroleum products, fuel, electricity and other sources of energy
- ☐ 14000000-1 - Mining, basic metals and related products
- ☒ 15000000-8 - Food, beverages, tobacco and related products
- ☐ 16000000-5 - Agricultural machinery
- ☐ 18000000-9 - Clothing, footwear, luggage articles and accessories
- ☐ 19000000-6 - Leather and textile fabrics, plastic and rubber materials
- ☐ 22000000-0 - Printed matter and related products

Selected categories

15000000-8 - Food, beverages, tobacco and related products

Select categories Remove all Cancel

Once selected, your choices will appear listed in the box.

CPV

45000000-7 - Construction work

79421000-1 - Project-management services other than for construction work

Select CPV categories

Then 'Edit regions' to select the Falkland Islands (FK).

Regions
Limit opportunities you are emailed about to areas you supply

All Regions

Edit regions

Region selection

Search regions

Enter the search criteria... Search Exact match Fuzzy search

Regions list

- ☐ DK - Danmark
- ☐ EE - Eesti
- ☐ EL - Ελλάδα
- ☐ ES - España
- ☐ FI - Suomi/Finland
- ☒ FK - Falkland Islands
- ☐ FR - France
- ☐ HR - Hrvatska
- ☐ HU - Magyarország
- ☐ IT - Italia

Selected regions

FK - Falkland Islands

Select regions Remove all Cancel

N.B- 'Public Lists' has not been set up yet, so skip this and 'Continue'...

Finally, confirm the details for the workgroup.

Create a new workgroup

Name Contacts Areas of interest 4 Confirmation

Workgroup name

Workgroup name: Procurement

Workgroup members

Mr Alex McShane Sales Manager

You will return to the Homepage, and your workgroup will appear in the box.

Workgroups

Activities are assigned to workgroups allowing all contacts within a workgroup to work on the activities together

Procurement (1) Request merge

Sales (2) Request merge

Add new workgroup