

Guidance for completion of the invitation to engage:

1. Click the link provided from the email with a subject heading “Invitation to Engage”
2. Create an account, or log in to an existing account



Supplier Network

Username (usually your email address)
testsupplier2.july2020@gmail.com

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

3. Select “Customer Requests”

The dashboard shows a grid of seven colored tiles representing different business metrics. A blue arrow points from the text "3. Select 'Customer Requests'" to the "Customer Requests" tile. The tiles are: Opportunities (103, red), Orders (0, blue), Invoices and Credits (0, orange), Customer Relationships (0, light blue), Customer Requests (1, green), Auctions (0, yellow), and Contracts (0, grey). The top left shows the "Supplier Network" logo and the top right shows a language selector set to "Eng".

Metric	Count
Opportunities	103
Orders	0
Invoices and Credits	0
Customer Relationships	0
Customer Requests	1
Auctions	0
Contracts	0

4. Under “Your Relationships & Requests” you will see an Invitation to Engage - select “Show Me”

Your Relationships & Requests

From here you can search for and manage trading relationships and requests between you and your customers.

Search by customer reference, description or customer name...

Customer Name	Reference	Description	Type	Request Status	Relationship Approved?	Show Me
University of Sussex	SREQ133	test	Invitation to Engage	Awaiting Response	-	

5. Then click “respond”

Invitation to Engage

Documents ⓘ
No documents found

Customer Contacts
No customer contacts found

6. This will open the “Customer Engagement” screen.

Customer Engagement

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](#)

7. Please update the questions in each of the following sections: Each section must show as **Complete**. Your bank details must be updated in the additional information tab and will be verified against the copy you provide in the documents tab.

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 ● Complete
- Product Classifications ● Complete
- Questionnaire ● Incomplete

Click or touch the headings to expand each section. You must fill in all questions with a * next to them. Validate

- 1: Agreement (4 questions)
- 2: Financial information (7 questions)
- 3: Compliance (10 questions)
- 4: Corporate Social Responsibility & Environment (10 questions)
- 5: Provision of Goods (5 questions)
- 6: Your Business / Organisation (10 questions)

- Documents ● Complete
- Additional Information ● Incomplete
- Notification Subscriptions ● Incomplete

87% Complete Save & Continue Later Finish

8. Under the documents tab, you need to upload a copy of your bank details; you will need to see a tick in both the Mandatory and Uploaded column to complete this section. This is the only mandatory document required.

View & Upload Documents			
Document Name	Document Type	Mandatory	Uploaded
Bank detail upload document	Bank Details	✓	✓

9. The bank details tab is under “Additional Information”, this is where you need to amend the information already provided:

Bank Sort Code (UK) or Routing Number: (DO NOT ENTER SPACES OR HYPHENS)

IL [REDACTED] 37

Bank Account Number:

1 [REDACTED] 96

IBAN Number (For NON UK accounts only - No Spaces please):

ii97 [REDACTED] 96

10. Once all sections show as complete, you can click “Finish” – at the top or bottom of the page. This will submit your responses and we will receive an email notification to confirm this.