



Multi-buyer procurement portal

Service definition document

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An introduction to

Multi-buyer procurement portal

Solution: scope and supporting services

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Service Description

Proactis Multi-language, Multi-Buyer Procurement Portal is a secure, web-based software platform, which facilitates commercial relationships between public sector buyers and suppliers.

The Portal allows buyers in the public and utility sectors to publish all procurement notice types compliant with UK Legislation. Buyers can also identify a wide variety of suitable suppliers, who can be approached through direct or indirect procurement exercises.

As the Portal is a web-based solution, it can be accessed by any user from any location through a secure internet connection and will not require any specific software installations. The Portal provides:

- A fully branded tool in accordance with our client's requirements
- A fully licensed platform compliant with the accessibility standards
- A comprehensive facility to advertise your opportunities to a wide range of suppliers
- Visibility of the economic impact of projects that buyers have undertaken
- Visibility of your organisation's procurement activities
- A service that helps your buyers to publish compliant notices
- Helpdesk support

Suppliers use the Portal to access essential information about opportunities to bid for contracts for the supply of goods, works and services to public and utility sector buyers.

Suppliers who need to assume subcontractor status in order to fulfil a contract, can also use the Portal to run their procurement exercises.

High-level information about procurement notices and public contract registers is also available for non-registered users.

Portal benefits

Our comprehensive procurement portal provides a vast array of benefits for users, promoting behaviours that benefit buyers, suppliers and the communities they operate in, for example:

- **Compliance** – ability to publish compliant FTS notices and Helpdesk support to assist when required.
- **Transparency** – promote competition within your supply chain by openly publishing opportunities that will be advertised to all appropriate suppliers.
- **Collaboration** – promote supplier collaboration in delivering bigger projects by outsourcing some parts of the delivery.
- **Innovation** – while promoting competition with your open procurement practises you will be able to encourage potential suppliers to invest in innovation, resulting in the potential development of new or enhanced products and services.

- **Supplier Diversity** – identify new suppliers and help them to develop their businesses through engagement with the public sector.

Buyer benefits

In addition to the above, buyers can also benefit from:

- **Reduced administrative costs.** A procurement exercise run through our Portal will provide a single repository for storing your procurement documentation, supplier responses and questions, for managing contracts and more. Our notification system alerts buyers about different activities like contract renewal, award, etc.
- **Improved supplier relationships due to open and transparent procurement practices.** Running an open process where all suppliers have full visibility of your procurement activities helps to build trust with your supply chain. Some of our buyers even offer insights into their future work opportunities through the Portal before any notices are issued.
- **Intuitive and user-friendly way of publishing notices.** Our Portals easy to follow notice wizard tells buyers exactly where they are in the process. It also provides guidance on to ensure buyers understand what is required from them.
- **Easy to use, centralised contract register.** The Portal provides a comprehensive overview of all contract activities in one place, together with contract management facilities The contracts register will allow buyers to add/remove suppliers, change expiry dates and store contract related documentation. A comprehensive reporting tool also allows buyers to extract information from the contracts register.
- **Ability to comply with local procurement policy directives.** The Portal offers tools to support local supply chains, as local content questions and guidance can be added into your notice wizard.
- **Enhanced Reporting functionality.** The Portals can offer enhanced reporting function to allow reporting on all data stored within this portal.

Our Portal does not offer benefits to buying organisations only, it also offers support to suppliers who are working or would like to work for public sector buyers.

Supplier benefits

- Awareness of business opportunities.
- Suppliers can promote themselves through their own Profile.
- Email alert system which ensures suppliers are always notified of relevant business opportunities.

Usability

The Portal is easy to use, accessible on multiple platforms and complies with WCAG (Web Content Accessibility guidelines) AAA Standard. It hosts guidance documents for all users and other content required by the client such as special

project pages, case studies, news items, videos and links to procurement related guidance and websites.

In addition to the live Portal, training and testing platforms are provided to test the functionality prior to going live.

Each registered user has access to a homepage from where they can access all relevant functions and guidance. Users do not have to be registered on the portal to access notice search facilities and certain reporting tools.

The Portal can be operated through any modern web browser.

No specific software licences are required.

Standard Functionality

Facilities for buying organisations include (but are not limited to):

- The ability to create and publish procurement opportunities.
- Conduct secure eTendering:
 - Noted interest
 - Document sharing
 - Questions and Answers
 - Secure Postbox access
- Conduct request for quotation exercises.
- Maintain a public and private contracts register.
- Maintain a public buyers profile.
- Search for suppliers.
- Multi-language capability

Facilities for suppliers include:

- The option to create a public profile.
- Record information relating to their company in terms of size, region, turnover, third sector status.
- Create an alert profile to be notified of potential opportunities.
- Search various notice types.

The Portal can interact with other systems integral to the delivery of client objectives.

Additional information about the Portal's features include:

Portal features

Full branding: The Portal can be fully customer branded. Branding can be reviewed and the Portal can be customised to reflect your requirements.

Multi-language is available including Welsh language.

Customer content: The Portal allows you to publish any news articles and details of events and connect to external links - which will be maintained for you by our experienced Customer Services Team.

Buyer registrations: Buyers access the Portal through a secure user ID and password and can manage their accounts through different levels of registrations. Administrator users can manage user access rights, review and manage all the notice opportunities published, and assign different user rights for different users.

Notice publications: The Portal has a facility to publish various notice types, such as FTS notices, website notices and Quick Quotes.

Quick Quote facilities: Where a buyer can approach supplier directly. Here you will be able to choose whether to make your notice publicly available or not.

Bespoke alert service promotes opportunities to potential suppliers automatically at the point of publication. A buyer only needs to select a CPV code and the Portal will notify all the supplier users with the same code in their profile. This will help a buyer to generate interest from a much wider group of suppliers.

Certain regulated notices are reviewed by the Customer Support Team prior to publication to make sure that publications are not delayed due to errors. We advise buyers if any vital changes are needed in order to ensure compliance with FTS requirements.

Secure Postbox facility: Buyers have access to a secure postbox facility attached to the notice. This allows users to monitor any notice interest, keep track of supplier activities, allow / reject late submissions and keep an audit trail that might be required at a late date.

Supplier registrations: Suppliers can register free of charge and are able to create an account with their company details.

Secure facility for the storage of all notices which a supplier is interested in.

Alert Profile: Suppliers can set up a profile by selecting specific CPV codes and locations to determine the types of notices they are interested in. The Portal matches notices with suppliers based on this data and alert emails are generated and sent to suppliers on daily basis.

Search facilities are available to non-registered users of the Portal as well as registered buyers and suppliers.

All supplier users will be able to find various notices published on the Portal.

Registered suppliers can access the contracts registers of buying organisations.

Buyers can search for suppliers based on the services they offer, company name etc.

Contracts Register: All awards are added as contracts to the Contracts Register and can be managed there by individual buyers, who can:

- Add or remove suppliers
- Extend contracts if required
- Leave internal comments for your team
- Store documentation

General Contracts Register options are available that allow you to:

- Switch the register on/off

- Hide certain contracts.

A configurable reporting tool is also available.

Third party links can be included in the Portal, set up to various relevant websites such as any supplier and buyer support website etc.

Additional functionality

On top of the functionality described, we can upgrade or introduce any extra tools as required by our clients. As part of the wider group of companies, Proactis Tenders Ltd can draw on the products already available within the group to enhance our product offering.

Please contact us to discuss your specific requirements.

Reporting

Extensive reporting facilities are provided to assist in the monitoring and evaluation of your use of the Portal, in line with strategic aims in national and local procurement.

Individual buyer organisations have access to reporting tools through their individual registration including contract registers. Here are some of the reports you will have access to:

- **Supplier by Region** – list of suppliers filtered by region and categories.
- **Successful Suppliers** – list of successful suppliers, who have been awarded contracts.
- **Notice list** – list of notices published between the selected dates.
- **Quick Quote invitations** – a report of Quick Quote Invitations.
- **Noted interest statistics for notices** – a report that details the number of suppliers from each region that register an interest in notices within the required timescales.
- **Postbox responses statistics for all notices** – a report that details the number of suppliers from each region that submit postbox responses to notices within the required timescales.
- **Contract Notices** – a list of contract notices published.
- **Contract Award notices** – a list of all contract award notices.
- **Quick Quote awards** – an analysis of quick quotes awarded.
- **Contracts awarded to third sector** – a list of contracts to organisations that have declared they are operating in the Third Sector.
- **Contracts Register report** – report can be generated with various criteria that can be specified by the user.

Portal wide reporting options are also available and access levels to these will be managed by you.

These reports will allow you to report on:

- Specific buyer activities
- Overall Portal performance

- Overall supplier numbers
- Overall buyer numbers
- Performance for different notice types

All the report types mentioned above are just an example of what the Portal can offer. Additional reports can be developed as required.

Data Warehouse option – enhanced options are also available that allow all data to be reported on. This is presented in the form of various APIs that can be used with other reporting tools available in the market.

Service implementation

On-boarding process

We will work with you and your technical representatives to on-board your data into the new Portal in a carefully managed way. Alongside your dedicated Account Manager, we will assign a Project Manager and Project Team to run this project for you. We will use PRINCE 2 principles and governance to ensure smooth delivery of this project.

The project will be delivered in multiple phases, the first of which will be an Impact Assessment, during which we will consider the work involved alongside risk and other regulatory requirements such as GDPR. This phase will produce timelines, key milestones and a total cost for the work.

Implementation phase

After agreement of the Impact Assessment and the scope of work, we will move into an Implementation phase. The management documents for this phase will include a Project Management Plan, including risk management, GANTT Chart, and deliverables. We will use the Key Milestones and dates set out in this plan to guide your project to delivery.

The Plan is kept under review in accordance with your instructions; typically, this is done via regular calls with the client and the issuance of a Highlight Report.

Proactis Tenders Ltd endeavours to eliminate or mitigate the consequences of any delays and might use additional resources if required. A comprehensive risk assessment document including steps to mitigate these risks will be produced at the start of the project and shared with our client.

If any delays occur, our client will be notified as soon as practically possible and we will provide information to agree with you on what steps will be taken to minimise the disruption.

Training

As part of the on-boarding, Proactis Tenders Ltd will arm your key users with the knowledge they need to help run the system, via a training package which can be delivered remotely. These Key users will be provided access to our training site that will enable them to cascade any appropriate training to their teams.

Other sources of support for the training of key users and standard users once in BAU are:

- A Help and Resources section on the Portal that contains system User Guides, as well as videos/blogs to help.
- A fully trained and experienced UK based Customer Support team available via phone, email and through the website (Monday to Friday 8:30am - 5:00pm)

After sales support

Once the service has been transferred to Proactis, an account manager will be assigned to support your teams.

Regular meetings will be organised to provide training and review the service provision.

Reporting requirements including frequency of these reports will be agreed with our client to track compliance with the SLAs, track any improvement suggestion, user feedback, Portal usage, etc.

Proactis will provide regular training sessions as well as user guides for each function.

Our customer support team will offer additional support as and when required within agreed Service Level Agreement boundaries.

Buyer on-boarding

Once registered on the Portal, Buyers will be assigned an Administrator to help manage their organisational structure. The Customer Support Team can assist with this.

Supplier on-boarding

This is self-service and will rely on communications/marketing from you. We can assist with the Portal specific content for these communications, such as instructions on how to register.

Our Customer Support Team is also there to assist should Suppliers encounter difficulties.

Customisation

For an additional charge, we can work with your design team to brand your Portal and develop a page to synchronize with your own website, so your potential suppliers have a seamless transfer from your site to ours.

You are also able to add logos, specific information, and documents to your profile to customise it. In addition to this you also can customise your Portal's reports for MI generation, amend admin rights for individual users and set auto reminders.

Exit Strategy

Off-boarding support will be provided, under the guidance of a Project Manager. All the information assets stored in the Portal will be made available to the new provider when required.

We will agree the scope and timeframe of the work required prior to the exit date and provide an up-to-date exit plan including all the associated costs.

We will cooperate with new contractor to ensure data transfer is achieved with minimal impact on the Portal users.

Proactis Tenders Ltd offers two types of Exit Strategy and the most appropriate will be agreed with you in preparation to the exit.

Standard Exit Strategy

Our Standard Exit Strategy is as follows:

1. Customer to identify last usage of the system within boundaries of contracted provision and ensure (using inbuilt functions) that documents are exported from the system prior to termination of contract.
2. Date to be agreed between Proactis and the customer as to the final extract of data. For customers who are hosted by Proactis, the first extract will be provided free of charge. Any subsequent requests for copies would incur additional charges.
3. Customer to provide an encrypted external drive to Proactis for the purposes of transporting data. It is highly recommended that the service utilised for this is either via private courier or recorded delivery mail processes.
4. Proactis will extract the customers' data and provide it in the format of a standard database backup. The type and version of the backup would be informed at the point of extract.
5. Proactis will then return the data on the encrypted device to the customer and request that it is extracted and restored.
6. Confirmation is to be provided to Proactis within 14 days of receipt of the encrypted device.
7. At the point of confirmation from the customer that the data could be restored or after 14 days (whichever is the sooner) Proactis will destroy all data relating to that customer after which point, further extracts will not be possible.
8. If the customer requires any consultancy from Proactis after this process, then the scope of works must be agreed, and the data sent back to us in the format it was originally provided.

Enhanced Exit Strategy

This strategy is based around additional requirements from standard where the customer has requested specific extracts of data or assistance from Proactis to help on-board data into a 3rd party system.

This exercise would incur additional charges relevant to the identified resource required through the Analysis and Specification stages.

Our suggested outline for the Enhanced Exit Strategy is as follows:

1. Analyse and define the requirements. This will include identifying the data to be extracted, its destination and format. Includes identifying the timescales for extraction of data.
2. Specification. Given the requirements Proactis will produce a specification of how the required data will be extracted. The Customer would be required to sign off the specification and agree any charges before commencement of works.
3. Development of any custom extracts. It may be the case that our standard extract format does not meet the requirements of the new system, Proactis is willing to and capable of developing any new extracts which may be required. This stage includes internal testing of the routines.
4. User Acceptance Testing. The extraction routines would be tested in a dry-run scenario so that the customer can verify that it meets their requirements. Sign-off is expected from the Customer before the final extraction takes place.
5. Extraction. This is the final extraction of data. This may be done in stages depending on the type of data. For example, Structural data will usually be required in advance in order that the new system can be set up ready to go live. Transactional and auditing data is normally extracted once the Customer has stopped using our system in order that the extracts include all data up to and including the very last change.
6. Package and Transmission. Proactis will package and transmit the data as per the requirements specified by the Customer in the analytical stage. Data can be transmitted by secure compressed connection to a remote system via HTTPS or SFTP, or the data can be compressed, encrypted (with the appropriate level of encryption) and then packaged onto suitable media for delivery by courier. Decryption and decompression instructions and keys will be sent separately from the data itself by alternative means agreed with the Customer.

Full and/or partial database dumps can also be employed as an auxiliary method of extracting the Customer's data. Although this does not make the data ready for import into a destination system, it does provide security for the Customer that no data has been left behind and can still be extracted at a later date.

Business Continuity

Proactis is an ISO27001 accredited company and has robust backup, restore and disaster recovery processes and systems in place.

All our mission critical systems are externally hosted with no single points of failure in the infrastructure and appropriate SLAs to return to normal service in the event of a loss of service to a Data Centre.

The systems we provide to customers are similarly located in Tier Three data centres, with redundancy in all service provisions, hardware, storage, electricity,

cooling and networks. So the single failure of any of these elements will not prevent the provision of our applications to our customers. In the event of catastrophic failure; earthquake, flood, national security event, we have capacity within other data centres to provide the service backed up by a formalised Disaster Recovery (DR) process which is annually tested.

We operate our solutions in specific territories with full production facilities available in either EU, UK or US. Every evening, the data is automatically backed up in an encrypted form and then transmitted to another data centre for storage (within same territory). This process uses third party tools to manage, encrypt and store the data with only relevant Proactis personnel able to access keys. Verifications of back-up integrity are performed and test restores executed on a weekly basis.

Throughout the day, periodic back-ups are also taken locally (within the data centre) to provide recovery to a point in time of no longer than one hour for production systems. As such, each day's operations are secured each evening and within a working day, we have recovery points to ensure the maximum loss is one hour. Our enhanced DR solution also ensures replication of the entire infrastructure on a 30-minute basis (with 15-minute delay).

Portal technical support

Proactis Tenders Ltd provides comprehensive technical support which is included in your annual fee.

Enhancement releases

Proactis will perform site maintenance, including development and enhancement releases, on a regular basis outside of core office hours. This will normally be done on a week-day evening after 5:30pm. The users will be appropriately notified of this maintenance work either through a Portal message or an email depending on our client's preference.

Vulnerability updates

To ensure your product remains secure and up to date with the latest vulnerability updates we organise regular maintenance windows. They are usually scheduled on a quarterly basis and organised with you with at least three months' notice. There may be times where we need to perform maintenance outside of this schedule, this will be organised with you and agreed with as much notice as possible.

Bug fixes

Any issues that cannot be resolved immediately by the Customer Support Team might require escalation to the technical team and will be managed in line with targets agreed with the client.

An issue is typically an event outside of a standard operation of service which can cause the reduction or interruption to the service provided by the Portal.

The Customer Support Advisor will try to resolve the issue and escalate it to the team leader if unable to do so. The team leader will assume ownership of the

issue and will follow it through to the resolution. All issues, if require any IT support, are logged through our internal tracking system which will allow us to monitor the progress with each individual one.

If IT resolution is required, it will be done depending on the priority assigned to the issue. The priority levels will be agreed with the client as part of the contract agreement.

Hot fixes

In response to urgent issues, it may be necessary to occasionally deploy “hot fixes” to the Portal. By their nature, these cannot be scheduled or notified to users in advance.

Hot fixes are be applied with caution, following a controlled-process, and only used in critical circumstances, they are designed to be released without system outages.

Service Levels

Service levels will be agreed on an individual basis.

As standard Proactis Tenders Ltd provides a 99.5% Uptime SLA for its hosted systems during core hours and 99% SLA for outside of those hours.

Support is available 8:30am to 5:00pm (UK-time) Monday to Friday. Customer Support is always provided and is available during core hours. The Customer Support line is manned by competent, qualified staff who check notices submitted for publication and provide general advice and guidance to all users and visitors to the site. Service levels are agreed with each client to cover call response rates, contact us functionality response rates and call back timeframes.

A Portal Manager is assigned as a single point of contact for the client, responsible for ensuring and reporting the successful delivery of the contract in line with agreed Service Level Agreements.

Any means of redress will be discussed with each customer individually.

Ordering process and Pricing

Pricing overview

Please review our Pricing document and contact Proactis to discuss this further.

The ordering and invoicing process

We would ask all orders to be directed to sales.mytenders@proactis.com.

Once we have discussed your requirements, your order will be passed to the project team to start the Implementation plan.

Once contract has been signed, we will start issuing invoices, as agreed, within the payment schedule of the contract.

All payments are due within 30 days or receipt of an invoice.

Contract termination

Contract termination timeframes will be agreed with each individual customer but typically we will require at least 3-6 months' notice to agree the Exit Strategy appropriate to your requirements.