Buyer guide

How to use the updated Constructionline platform

Constructionline

About Constructionline

Constructionline is the UK's leading procurement and supply chain management service that collects, assesses and monitors standard company information through a question set that is aligned to PAS 91:2013, the standardised pre-qualification questionnaire developed by BSI to reduce duplication within the construction industry.

Our aim is to provide efficiency savings to public and private sector buyers and the construction industry. We do this by streamlining procurement procedures and improving the supply chain management processes by reducing risk, creating cost efficiencies and helping buyers.

Constructionline has created a new IT system that will make the business more effective and agile, whilst improving efficiency and bringing more automation to the application process. On 25th October 2016 Constructionline launched this new platform.

About this guide

This user guide is intended show our buyers (new and existing) how to make the most of the updated Constructionline service.

It provides step by step instructions on how to join Constructionline as a new member, how to administer and maintain your account and how to use the platform to maximise your supplier relationships.

Please note: For the purposes of this document, the following terms will be used in relation to the below levels of Constructionline membership:

Level 1 – Associate membership
Level 2 – Silver membership
Level 3 – Gold membership
Level 4 – Platinum membership

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1. Joining Constructionline

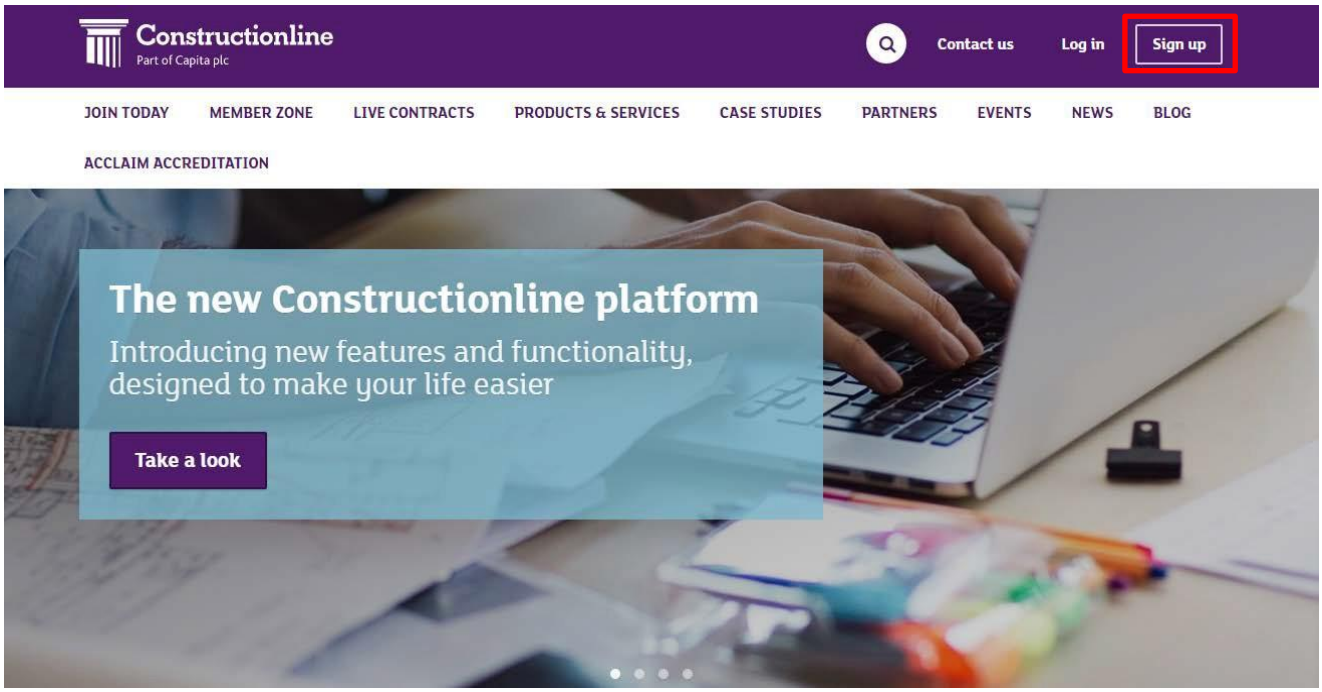
1.1 Select plan & pay

The following process steps show you how to select a plan and pay for a Constructionline membership.

Step 1: Sign up to Constructionline

Go to the Constructionline website - Constructionline.co.uk

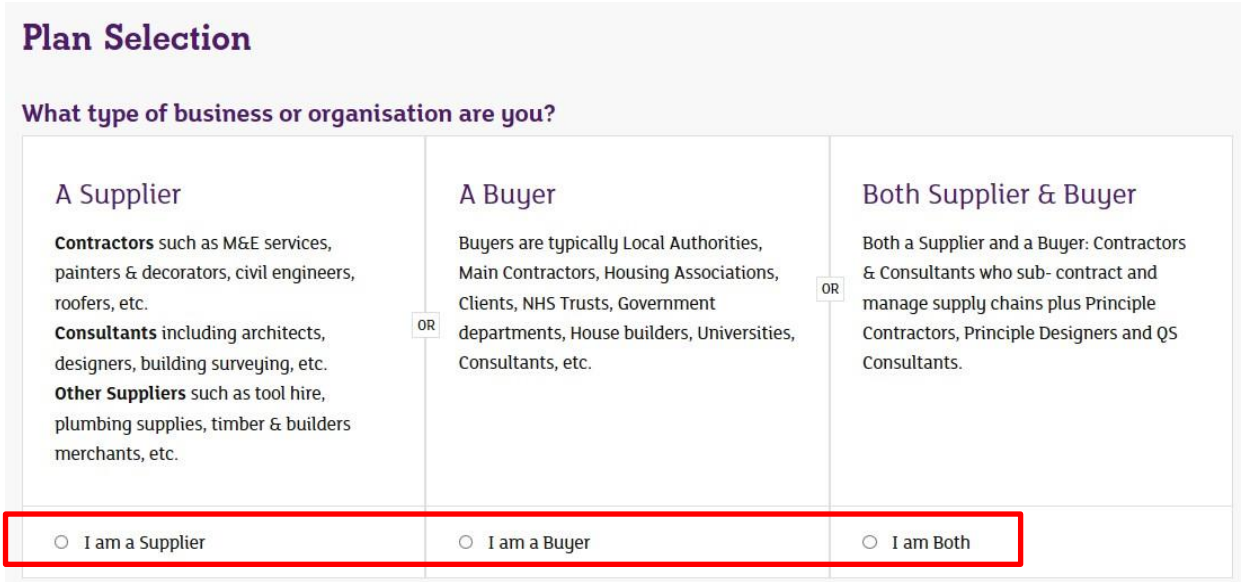
Click on the **Sign up** button in the top right hand corner:



Step 2: Select plan

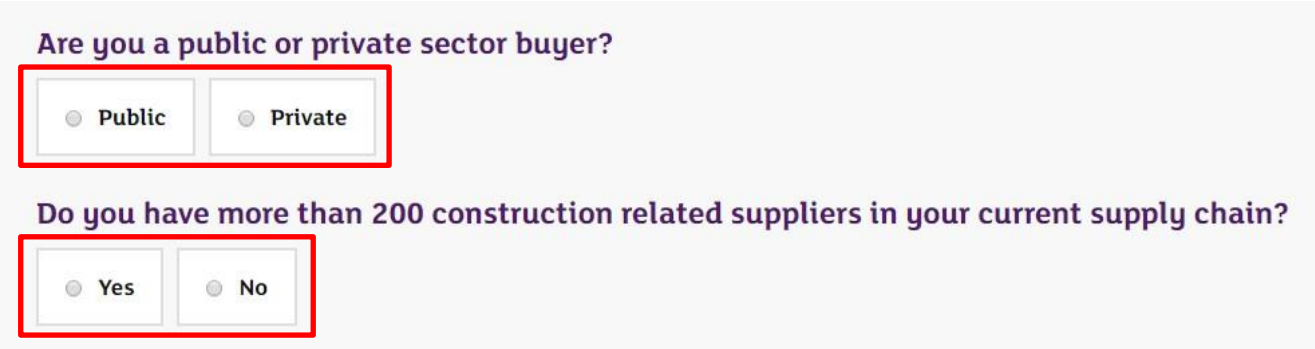
Select the type of organisation that best describes your business:

Buyer: Buyers are typically local authorities, main contractors, housing associations, clients, NHS trusts, government departments, house builders, universities, consultants etc.



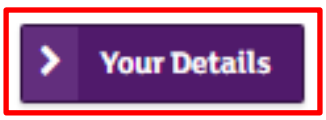
Step 3: Buyer Plan questions

Answer the two buyer questions below:



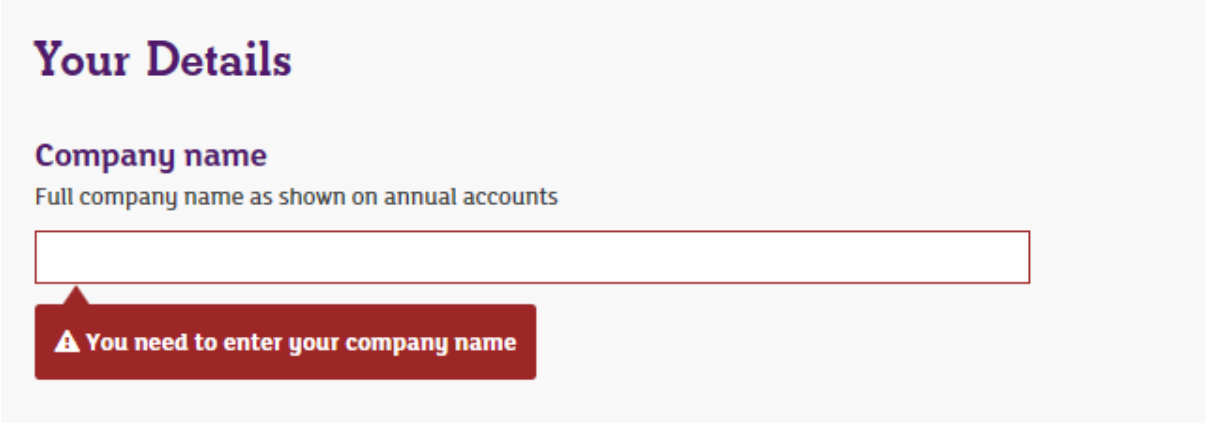
Step 4: Review details & proceed

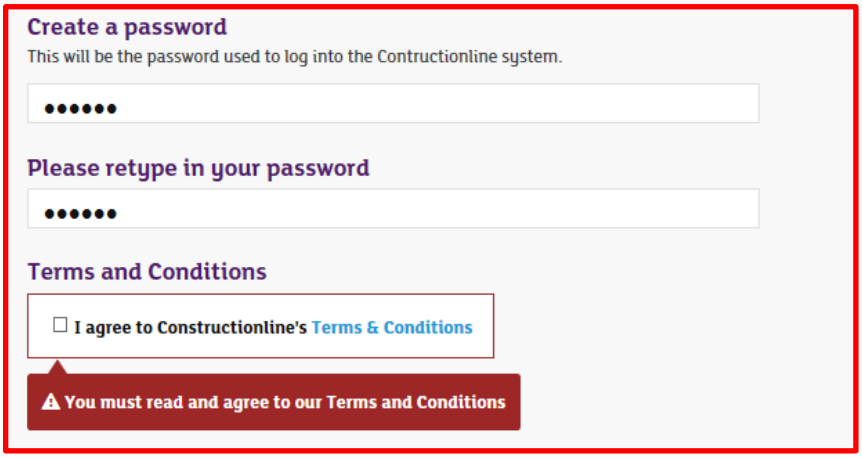
Click the Your details button to go to the next stage.



Step 6: Enter your details

Enter your details into the fields provided. Ensure all details are correct and a password is selected and repeated.

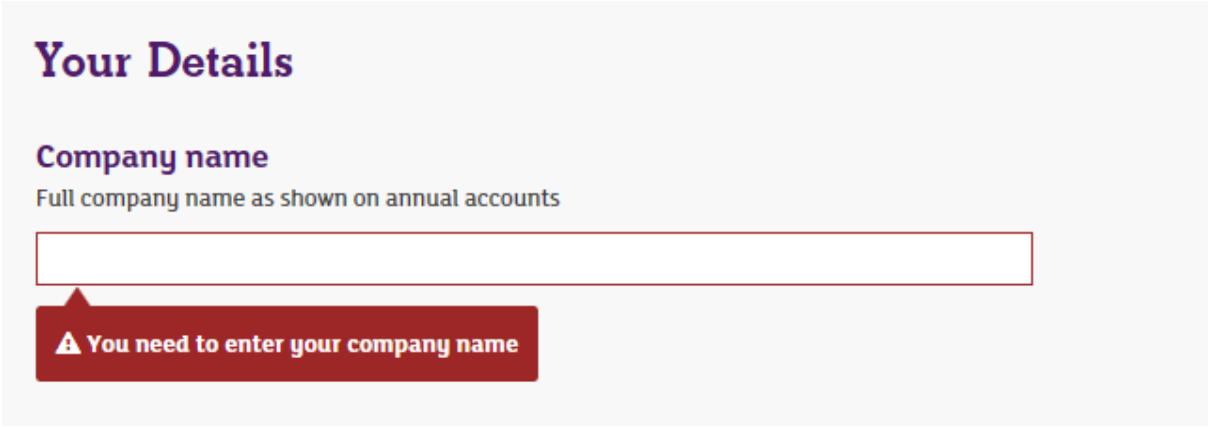


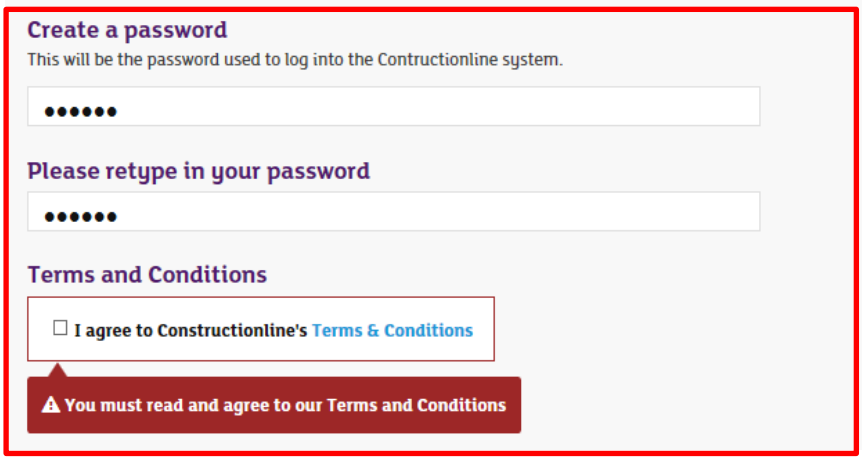


Don't forget to agree to the Terms & Conditions.

Step 6: Enter your details

Enter your details into the fields provided. Ensure all details are correct and a password is selected and repeated. Don't forget to agree to the Terms & Conditions.





Step 7: Choose payment option

There are a variety of ways to pay. Most people pay with a credit or debit card, although other payment options are available.

If credit / debit card - *Go to step 7*
If other ways to pay - *Go to step 8*

Step 8: Credit / debit card

To pay by credit or debit card, click the **Pay with Credit/Debit Card** button. You will then be taken to an external website to complete your payment.

Step 9: Other ways to pay

Alternatively, you can pay through the following methods:

Cheque

To pay by cheque, please make your cheque payable to 'Constructionline' and write your unique Constructionline application number on the back of the cheque, then post to:

PO Box 6441
Basingstoke
Hampshire
RG21 7FN

BACS

Please arrange for payment to be made to the account below and ensure that your unique Constructionline application number is included in your payment reference:

Bank: Barclays Bank plc
Account name: Capita Business Services Ltd
Sort code: 20-67-59
Account number: 70872326
VAT registration number: 618184140

Direct Debit

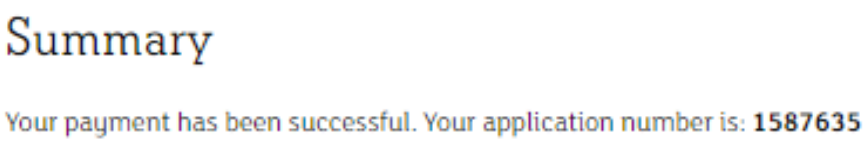
To set up a Direct Debit please complete the 'Direct Debit Form' attached to the payment section and submit this to your bank. Please ensure your unique Constructionline application number is included within the Direct Debit reference.

Pay By Phone

To make your payment by telephone, please call **01256 383 928** and use your unique Constructionline application number for reference.

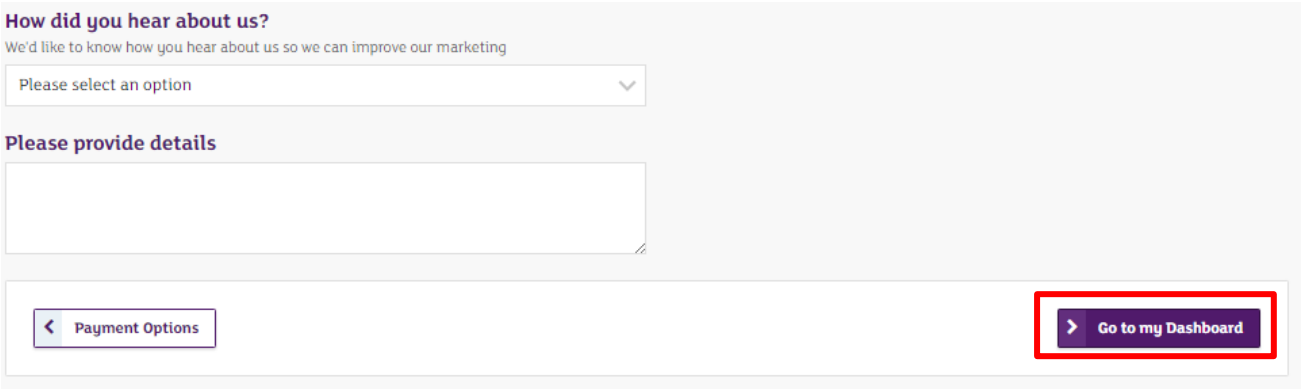
Step 10: Payment confirmation

If your payment is successful, you will see the following message. You will then be directed to resubmit your payment.



Step 11: Go to your Dashboard

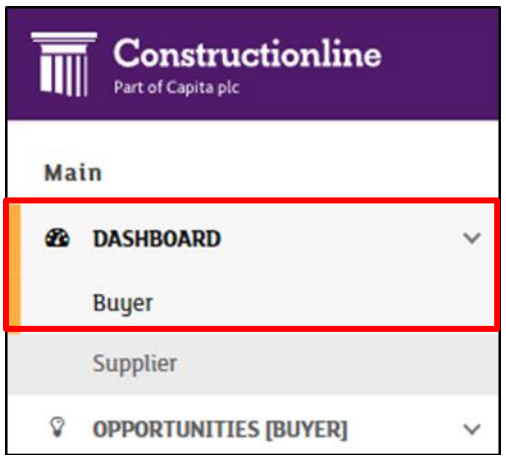
We'd like to know how you heard about us to enhance and improve the service we can provide. After this you can visit your Dashboard.



1.2 Create buyer profile

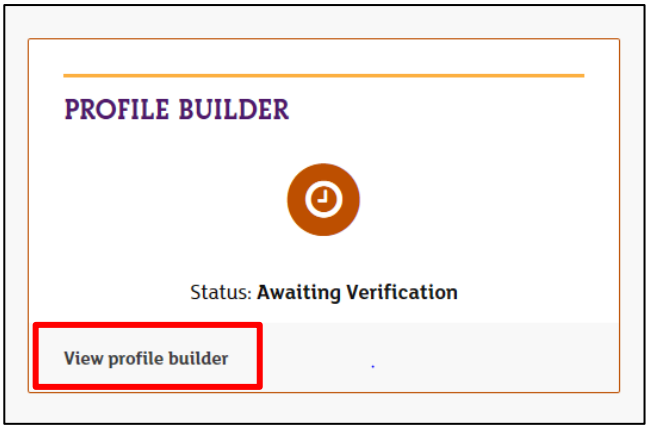
Step 1: Go to dashboard

Click on the **Buyer** link which is on the left-hand side of the screen, under **Dashboard**.



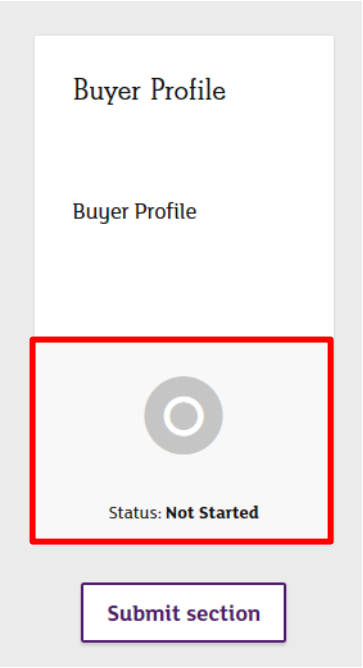
Step 2: Profile builder

At the top of the page, click **View profile builder** to edit the information within your profile.



You will then be directed to the **Submit section** page and from here you can add details. A symbol will feature on the **Company details** section dependent on the status of your profile during the completion.

- A grey circle indicates the profile **hasn't been started yet**.
- An orange circle with a clock indicates the profile is **awaiting verification**.
- A red circle with white triangle and exclamation mark indicates **updates are required**.
- A green circle with white tick indicates the profile is **completed and verified**.

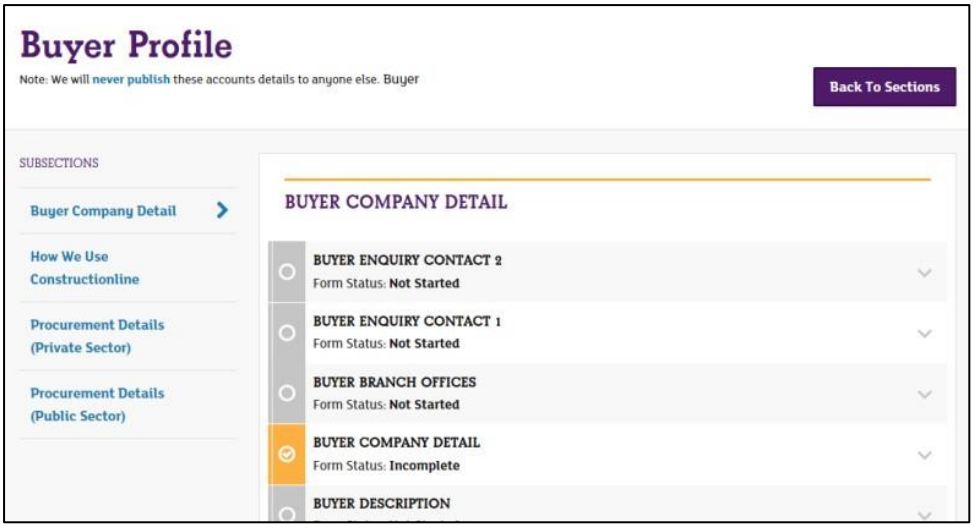


Step 3: Build buyer profile

The buyer profile allows you to tell suppliers about your organisation. Specifically:

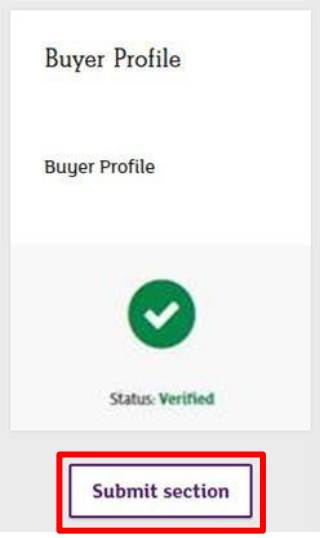
1. Company details
2. How you use Constructionline
3. Procurement details - Within procurement details, there are certain questions that relate to companies, whether you are in the private or public sector. Dependent on your company type, this will determine which questions you must complete.

Click on each subsection header in blue to answer the relevant questions.



Step 4: Submit section

Once all of your information has been submitted within the profile, click Submit section.



Step 5: Create profile

Once you have completed all of the relevant sections, click **Back to sections**.

Step 6: Add company description (optional)

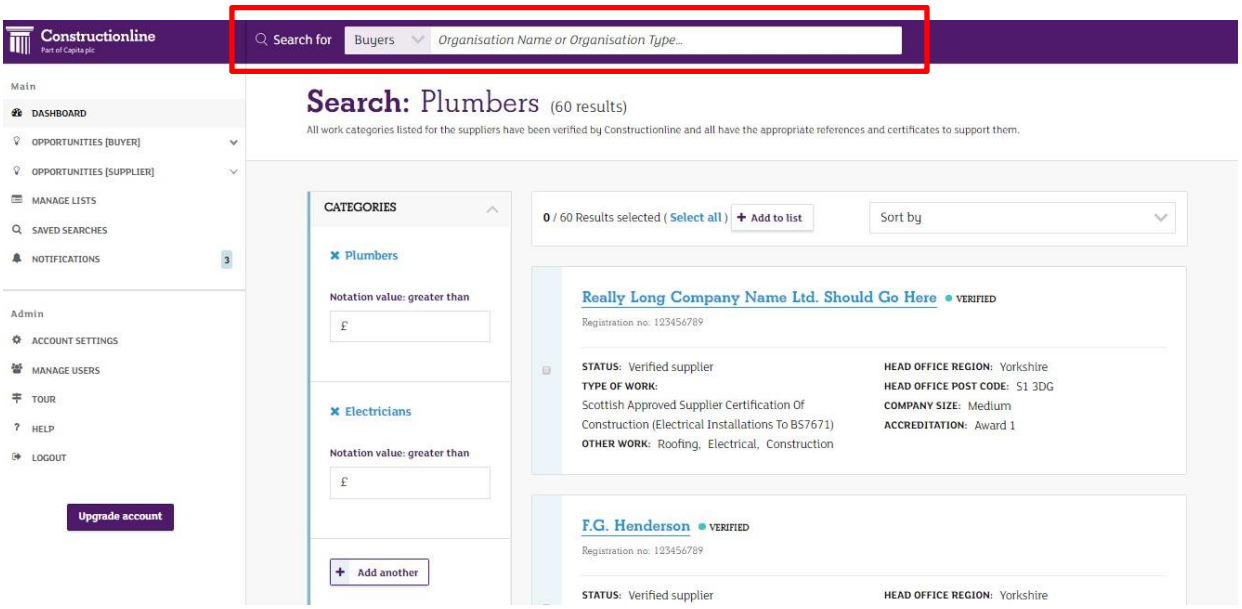
The final section to complete within the buyer profile is the company description section. This can be found and updated from the **Buyer dashboard** at the bottom right hand section of the page.

2. Using the platform

2.1 Universal search

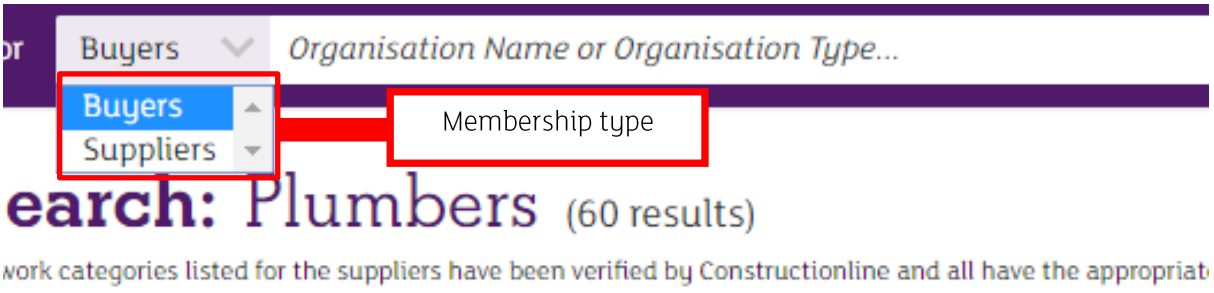
Step 1: Click on the search bar to activate it

The search bar will be available on many pages, including the **Dashboard**.



Step 2: Select search type - Buyers or suppliers

Select the type of member you wish to find from the drop down list.

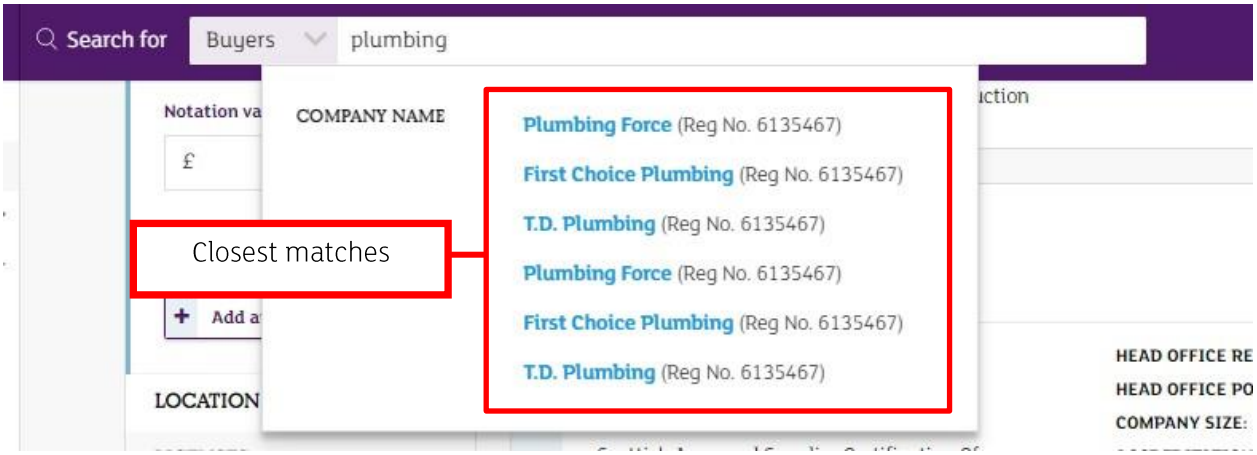


- If **buyers** - *Go to step 3*
- If **suppliers** - *Go to step 4*

Step 3: Search buyers

If you are searching for buyers, you can enter the organisation name (e.g. Kier Construction) or the type of organisation.

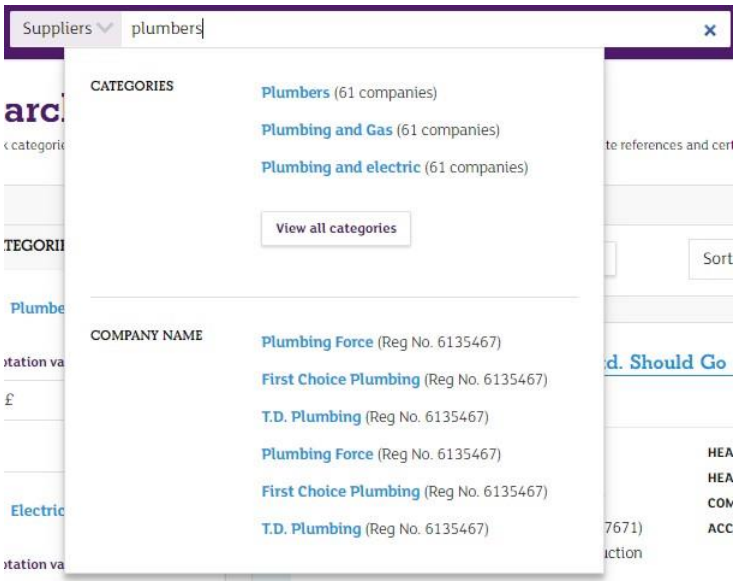
When partially filled names are entered, the search will provide closest matches in the drop down box below.



Step 4: Search suppliers

If you are searching for suppliers, you can enter the company name or type of supplier that you're searching for (e.g. plumber).

When names are entered, the search will provide closest matches in the box below the search bar for both companies and categories of work.



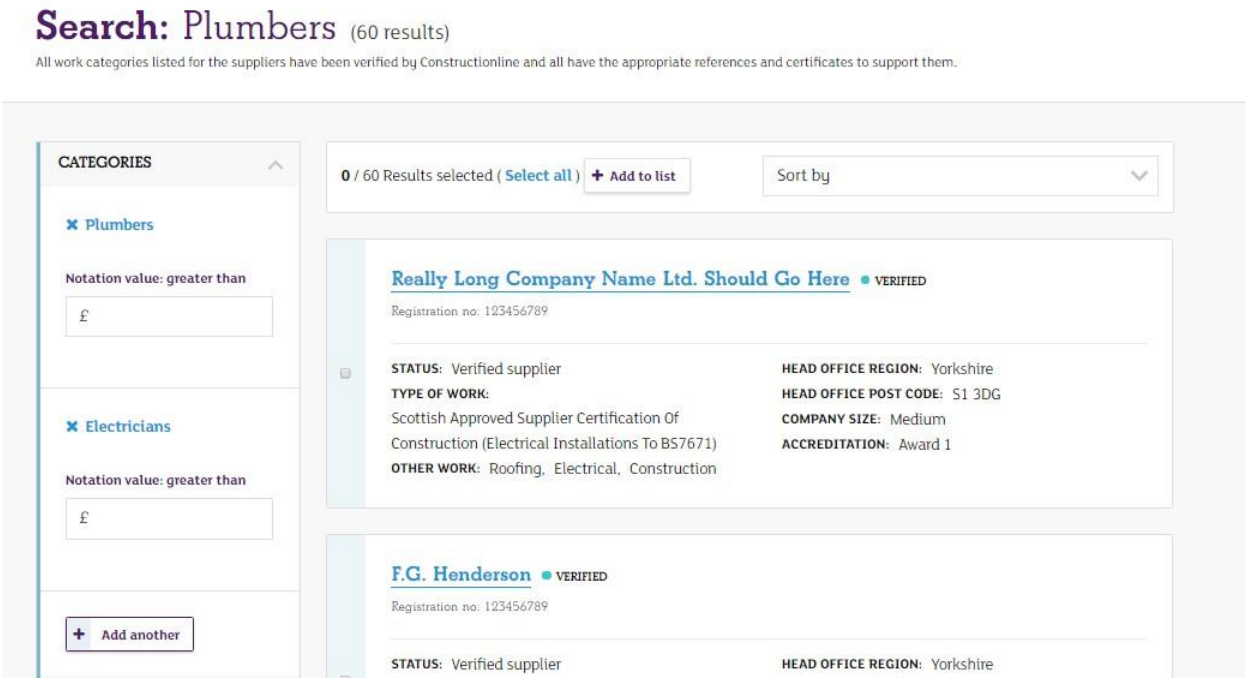
Step 5: View & refine search results

Once the search results have appeared, you will now have the option to view member details or refine the search results further.

You can add or remove filters on the left-hand side to refine your search results. Results can be refined using the following criteria:

- Notation value
- Category
- Location
- Licenses and accreditations
- Size of company
- Current Product Level

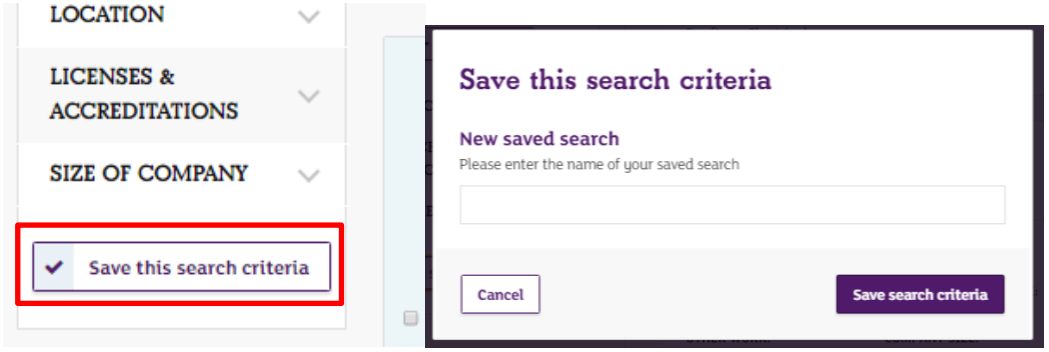
Click on the company name to see further information on the company.



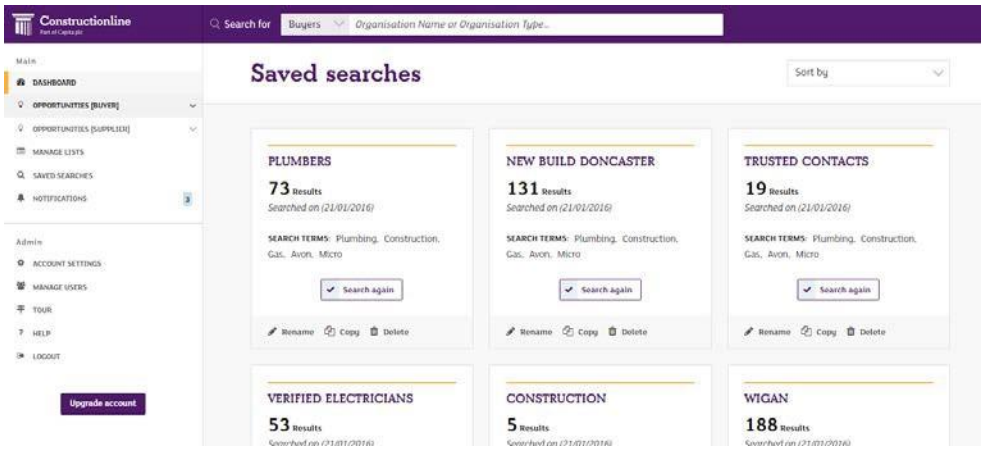
Step 6: Save, add to list or discard search results

1. Save

To save a search click the **Save this search criteria** button, located below the search filters.

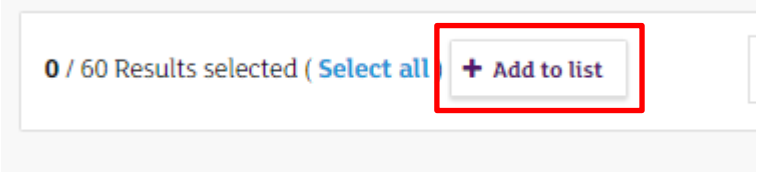


Once clicked, you will be prompted to name your **saved search**. Upon naming your search, you will be able to find the results in **My saved searches** - this can be found on the left hand side.

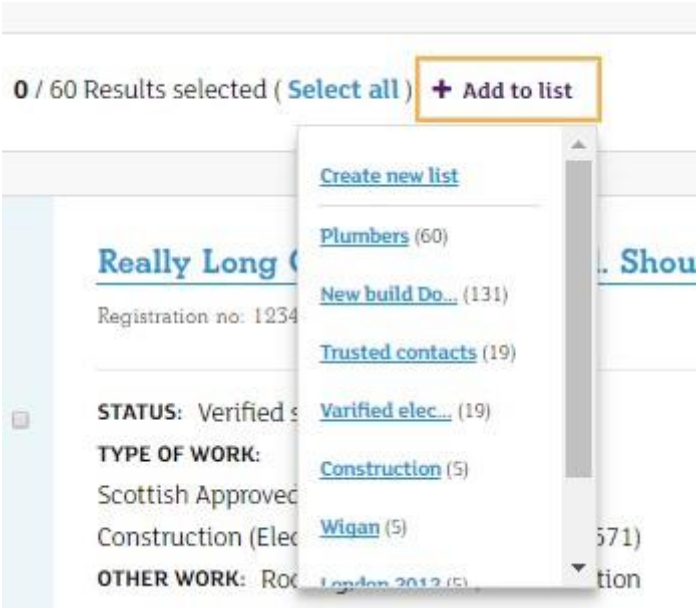


2. Add to list

To add your results to a list, simply click the + **Add to list** button which is located above the search results.



Upon adding to a list, you will be asked to specify which list or to create a new list. Click your preferred choice.

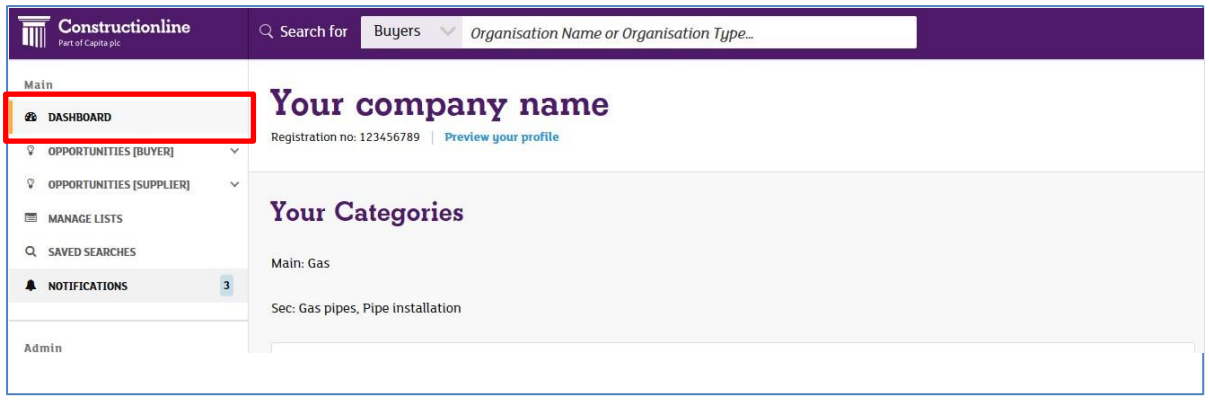


3. Discard search

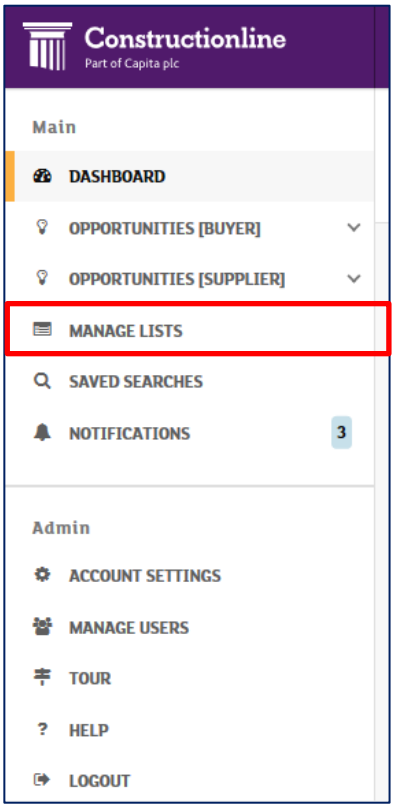
To discard a search, simply navigate away for the search results page.

2.2 Creating & maintaining lists

To create a new list, navigate to the **Dashboard**.



Go to the **Manage lists** section of the member **Dashboard**.



You will be given two options from the Dashboard for lists:

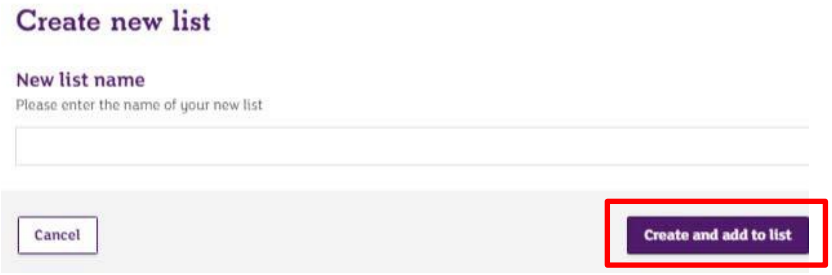
1. **Create new list** – *Go to step 1*
2. **Manage lists** – *Go to step 4*

Step 1: Create new list

You can create a new list by clicking the **Create new list** button.

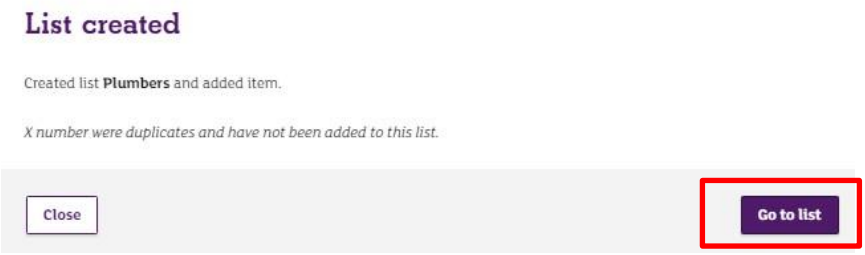
Step 2: Name your list

Give your list a name and then click **Create and add to list.**



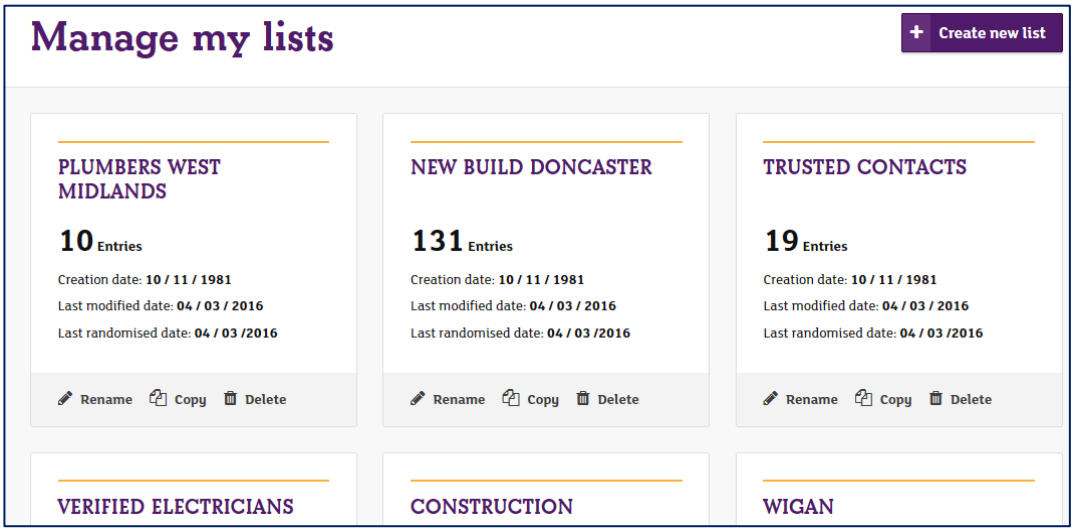
Step 3: Go to list

You will receive screen confirmation once the list has been created. Click **Go to list** to access it and add members.



Step 4: Manage your list

Manage all lists from the **Dashboard**. Here you can **update, delete, rename** and **copy** lists.

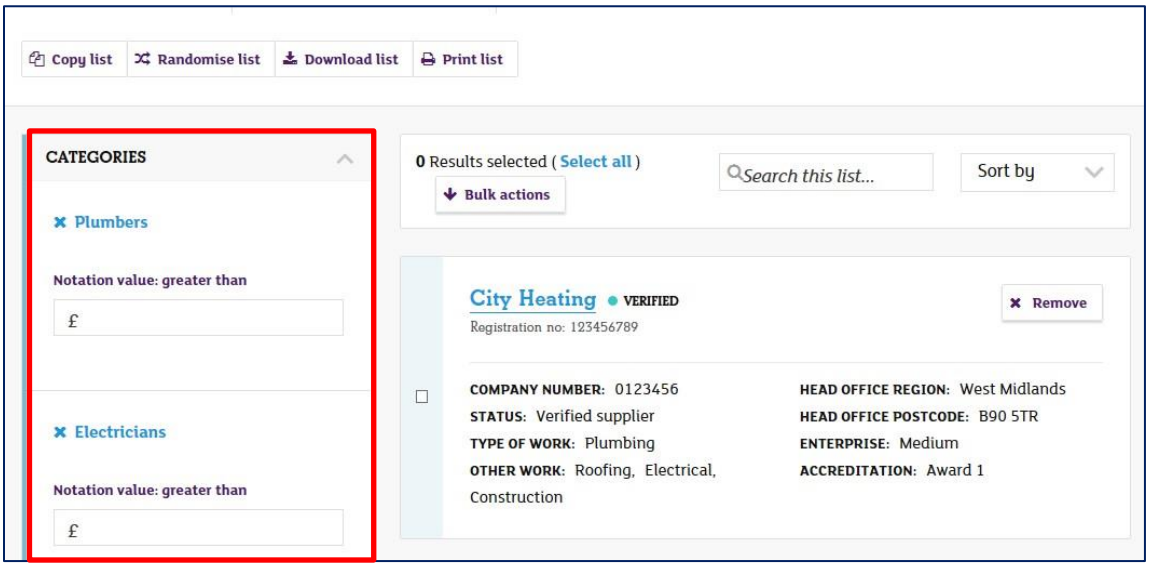


To:

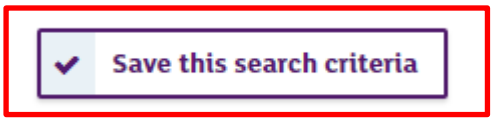
1. **Update list** – *Go to step 5*
2. **Delete lists** – *Go to step 6*
3. **Copy lists** – *Go to step 7*
4. **Rename lists** – *Go to step 8*

Step 5: Update list

To update a list, click on the list title and enter data in the **Categories** fields on the left hand side of the page.

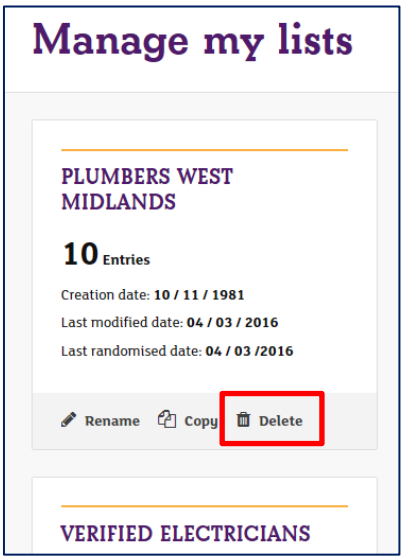


Then click **Save this search criteria**.



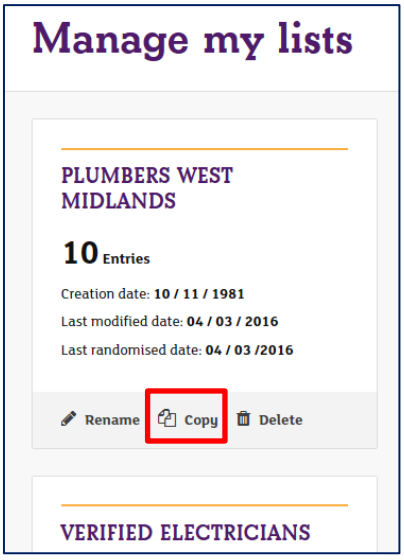
Step 6: Delete list

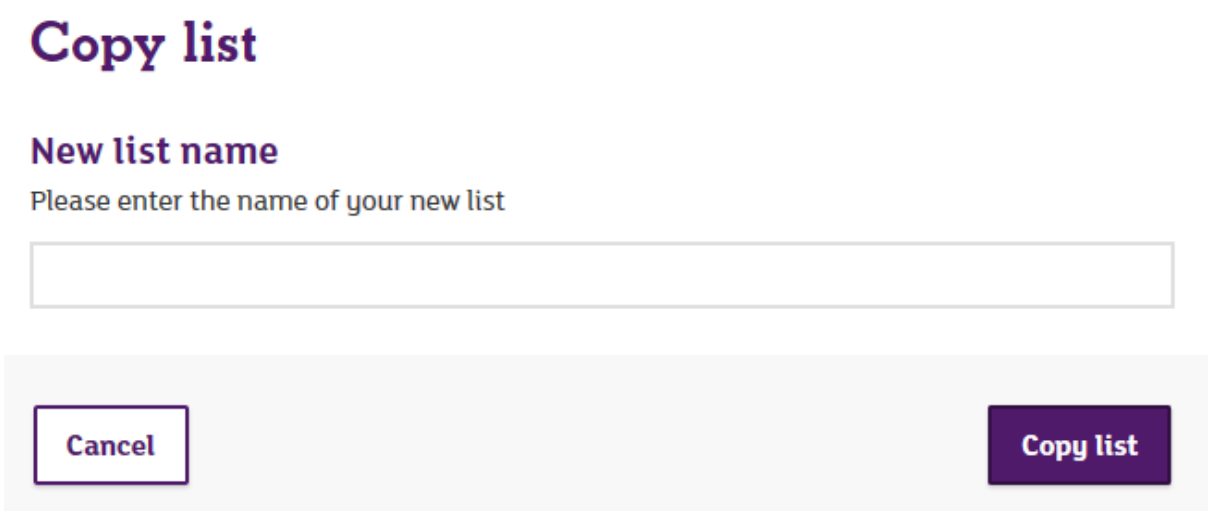
To delete a list, click the **Delete** button on the list.



Step 7: Copy list

To copy a list, click the **Copy** button on the list.

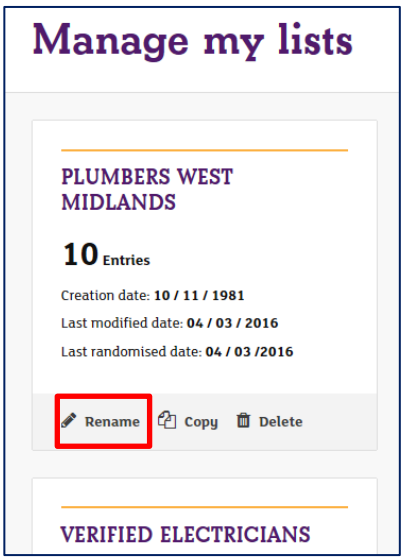




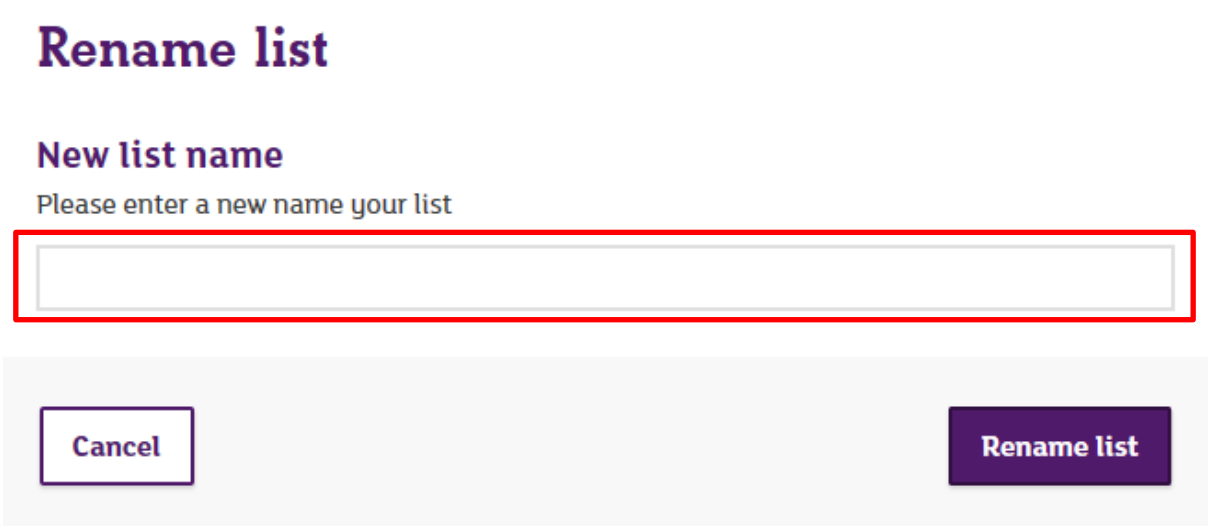
Enter a new name for the list and click **Copy list**.

Step 8: Rename list

To rename a list, click the **Rename** button on the list:



Type the name into the text box provided and then select **Rename list**.

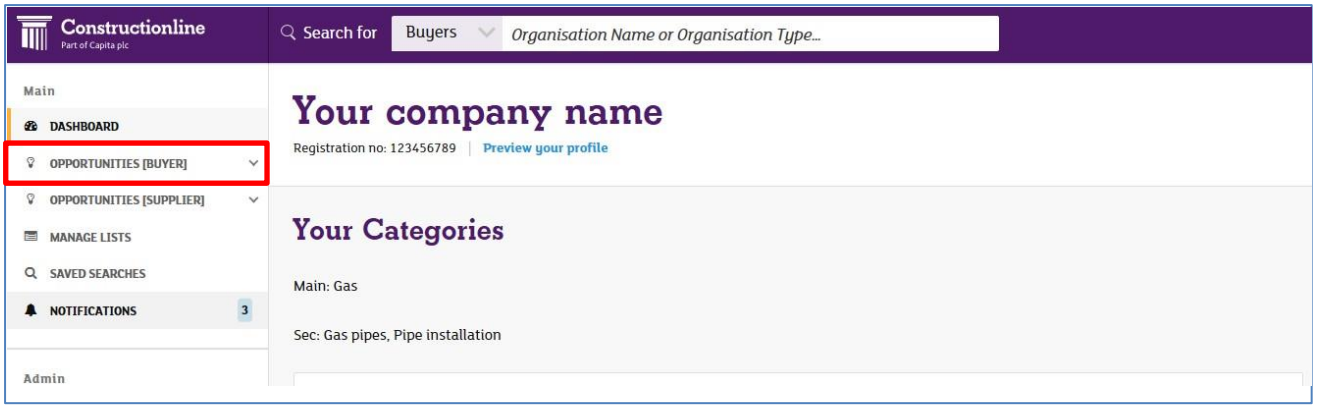


2.3 Buyer – Create, manage & view opportunities

As a buyer on Constructionline, you can publish opportunities to suppliers on our platform.

Step 1: Click the Opportunities [Buyer] option in the Dashboard

Click the drop down on Opportunities (Buyer).

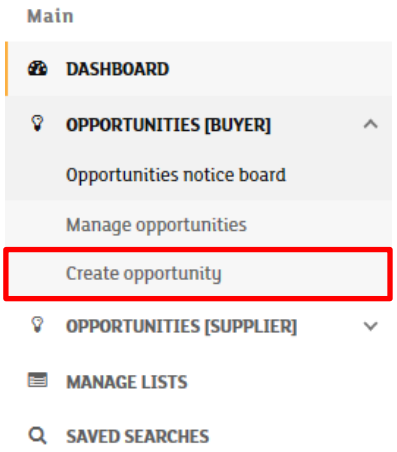


You will then see three options:

1. Create new opportunity – *Go to step 2*
2. Manage opportunity – *Go to step 3*
3. Search for Opportunities Notice Board – *Go to step 4*

Step 2a: Create new opportunity

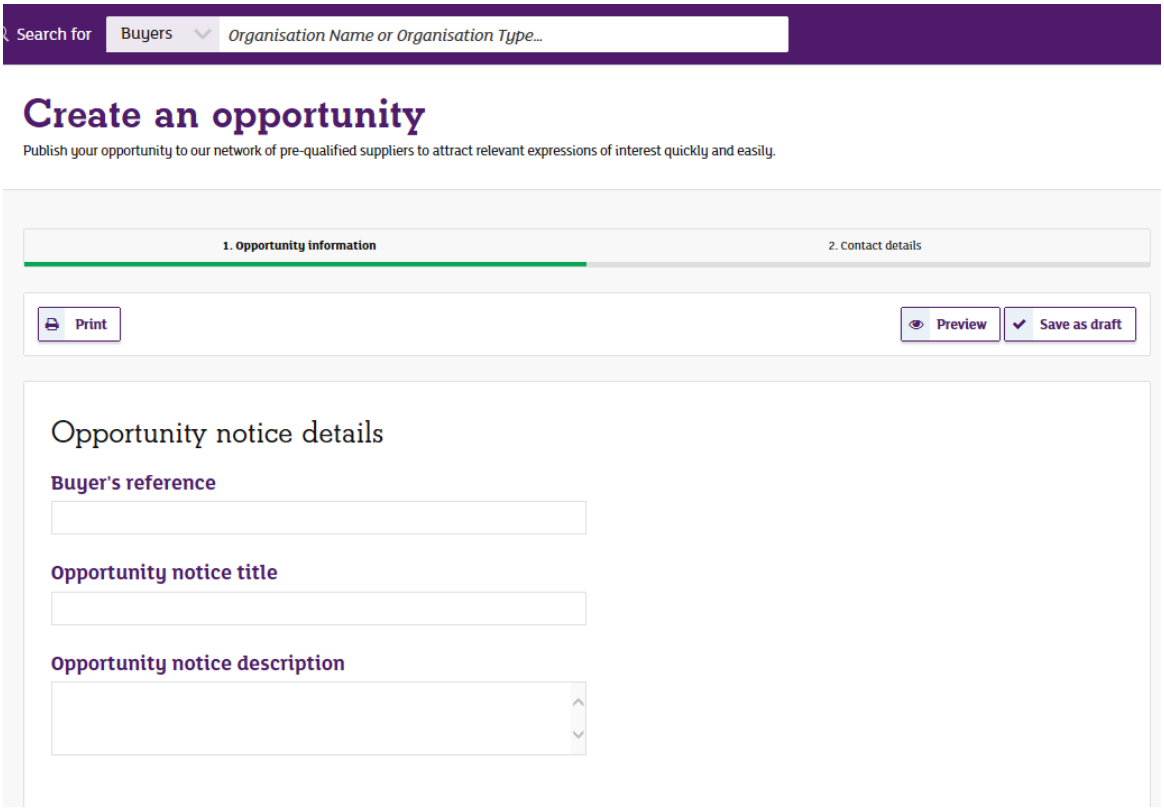
You will be presented with a form to complete.



Step 2b: Complete form

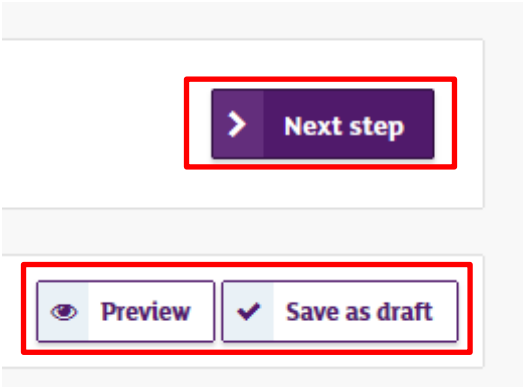
Complete the form with the information requested:

- **Buyer reference** – A reference of your choice.
- **Opportunity notice title** – A title of the opportunity (e.g. project name).
- **Opportunity notice description** – A brief description of the opportunity.
- **Value of work** – Estimated amount you are willing to spend on the job.
- **Notice schedule** – Start and end date and time (if applicable) for the job.
- **Opportunity location** - Specify how long the notice can be valid for suppliers to submit information to you.
- **Documents** - Upload any relevant documentation that may be needed for the opportunity



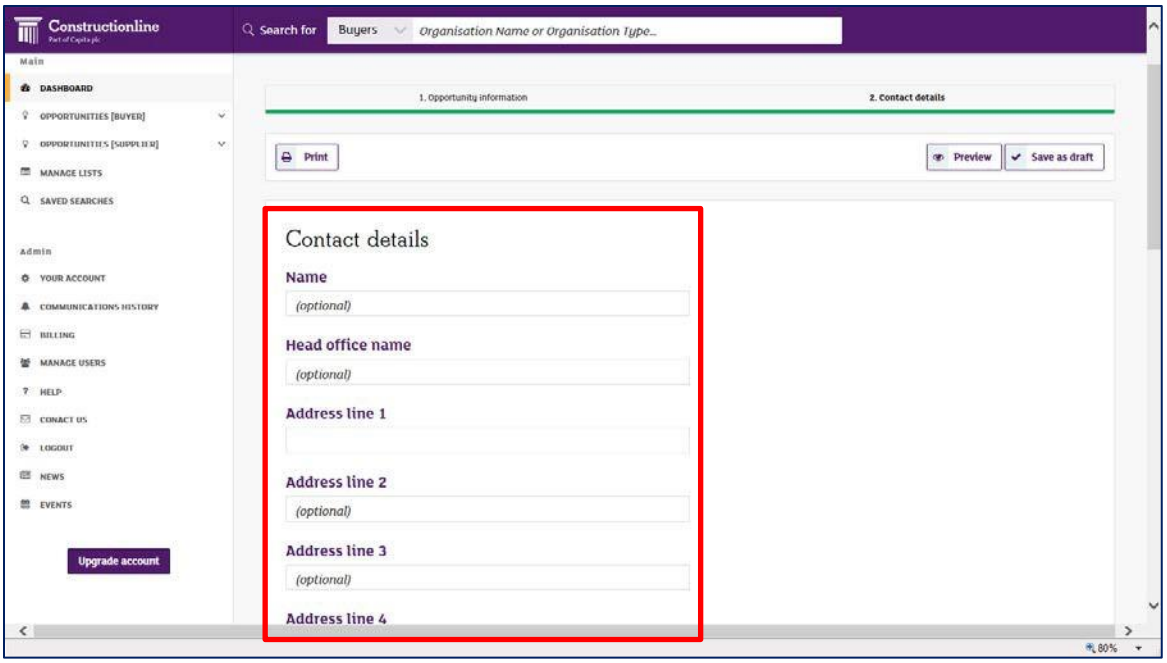
Step 2c: Preview, save as draft or go to the next step

1. To continue creating the new opportunity, click **Next step**.
2. To preview the new opportunity, click **Preview**.
3. To save the new opportunity and work on it at a later date, click **Save as draft**.



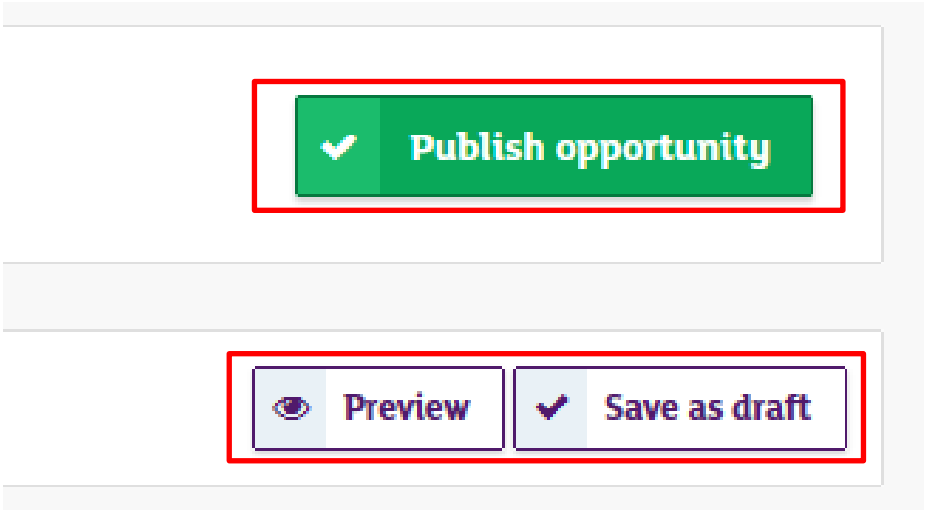
Step 2d: Populate contact details

Enter the contact details in the spaces provided.



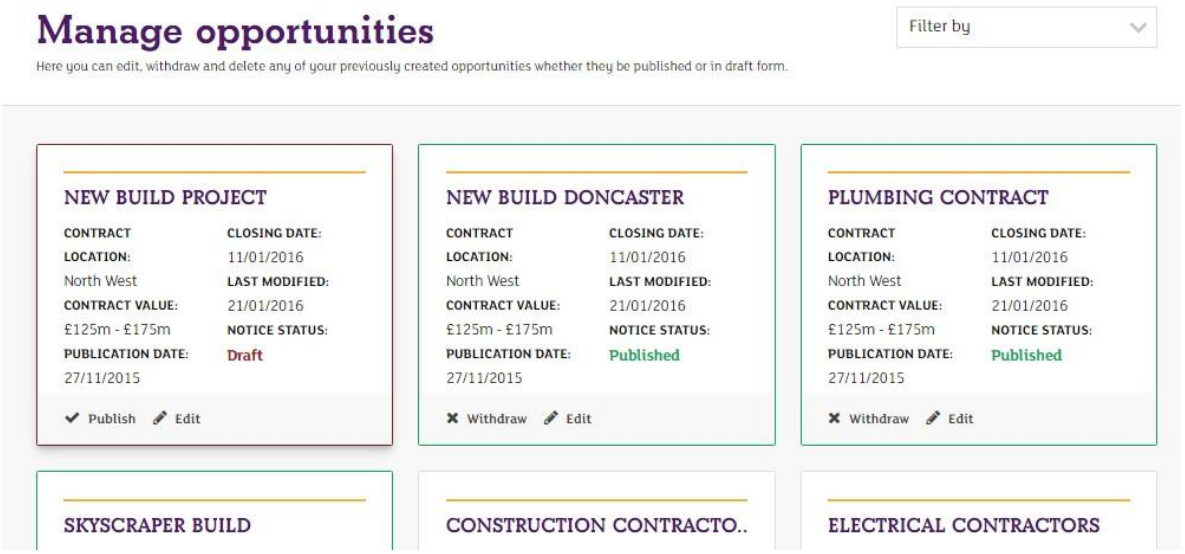
Step 2e: Preview, publish opportunities or save as draft

1. To publish the opportunity, click **Publish opportunity**.
2. To preview the opportunity, click **Preview**.
3. To save the new opportunity and work on it at a later date, click **Save as draft**.



Step 3: Manage opportunities

Click **Manage opportunities** in the **Dashboard**. All of your opportunities are displayed here in summary format.



Here you can edit, withdraw and delete any of your previously created opportunities, whether they have been published or are in draft form.

Options:

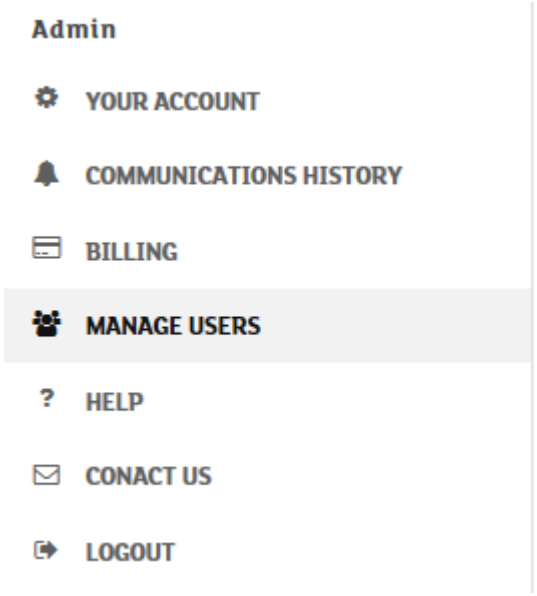
1. **Edit draft or live opportunity** - Create a new opportunity with your pre-populated opportunity details.
1. **Publish draft opportunity** - Once published, the opportunity will be uploaded to the Opportunities Notice Board (ONB) and can then be viewed by suppliers.
2. **Withdraw live opportunity** - The opportunity will be removed from the Opportunities Notice Board and will remain as a draft until changed.
3. **Delete draft opportunity** - Delete an opportunity from the dashboard by clicking the **Delete** button.

3. Account administration

3.1 Update account information

Step 1: Go to profile

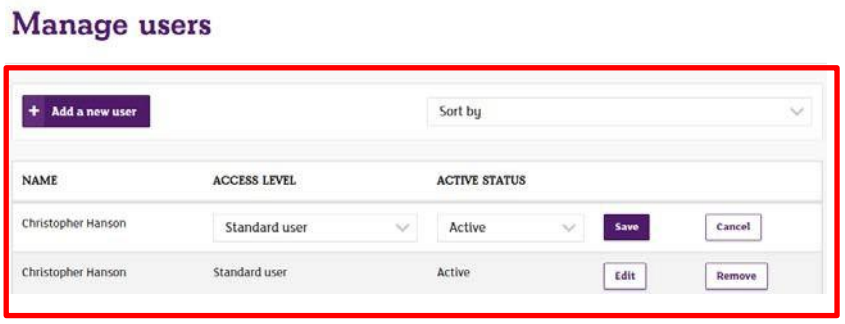
Click the Dashboard button on the left hand side of the screen.



This is the first screen you are presented with after you have joined and paid for the service.

Step 2: Manage user

Click the Manage users section to add to a user to your account, edit users and remove users.

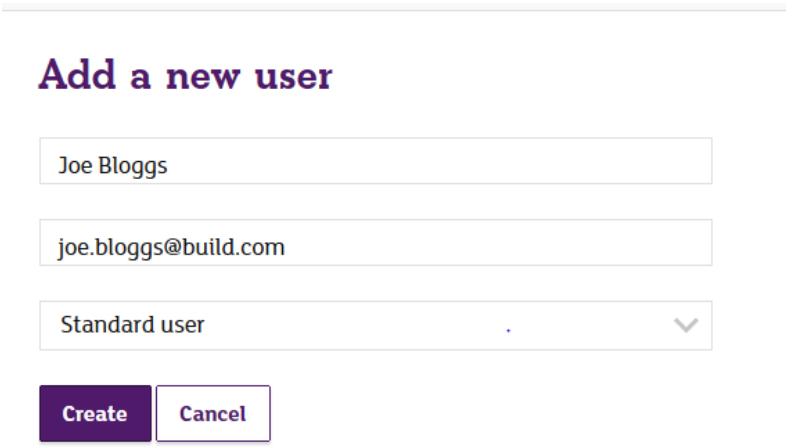


Step 3: Add user

Click **Add user** to add a user to your profile.

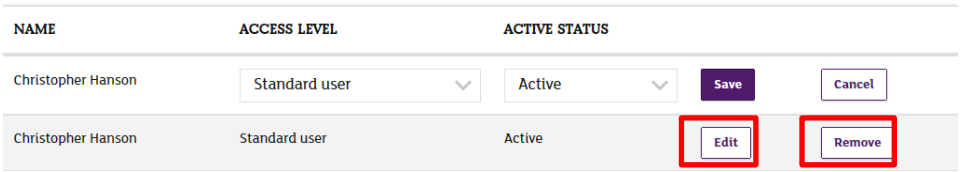
Enter their name and email address in the fields provided and choose the type of user access you want to give the new user:

1. Standard user
2. Read-one user



Step 4: Edit/remove user

Click **Edit** to update the user details
Click **Remove** to remove the user



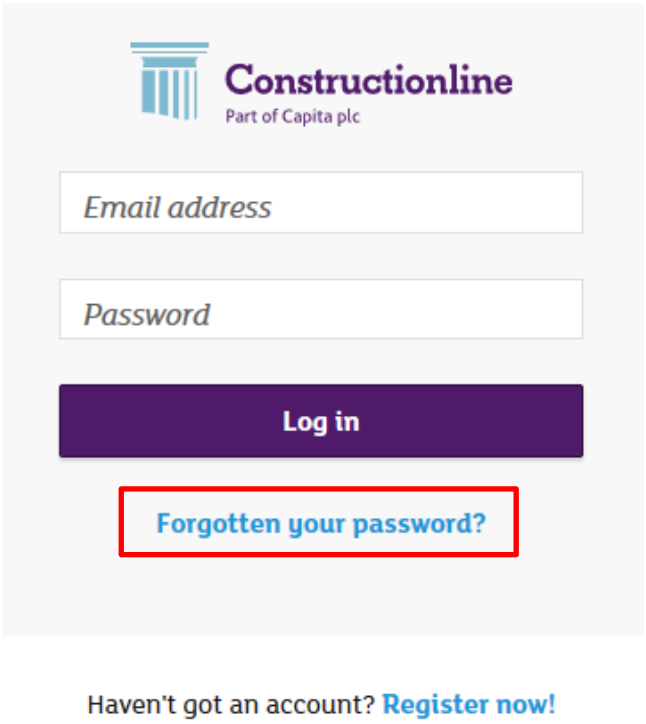
3.2 Password issues

You can change your password either by:

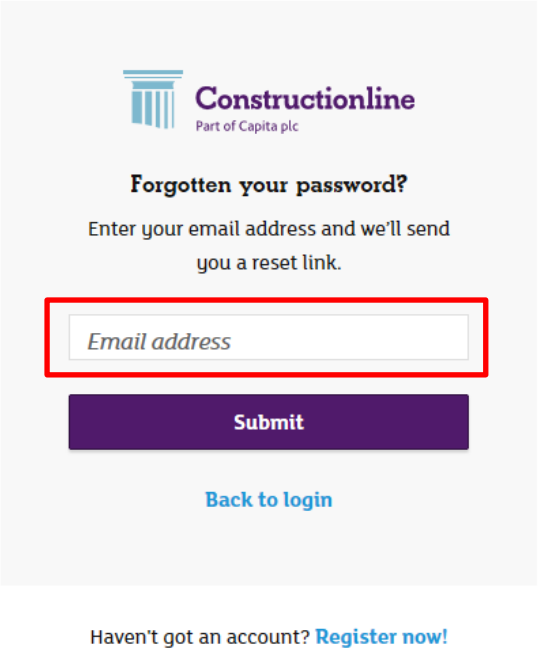
1. By clicking the '**Forgotten your password?**' button at the **Log In** screen
2. Logging in and changing your password from your dashboard

Step 1: Forgotten password

Should you forget your password, simply click the 'Forgotten your password?' link at the Log in screen.

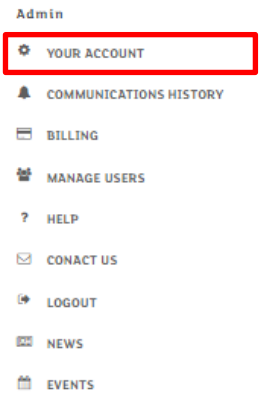


You'll be asked to enter an email address to allow the system to send you an email link to reset your password. Click submit then follow the instructions on the email you receive.

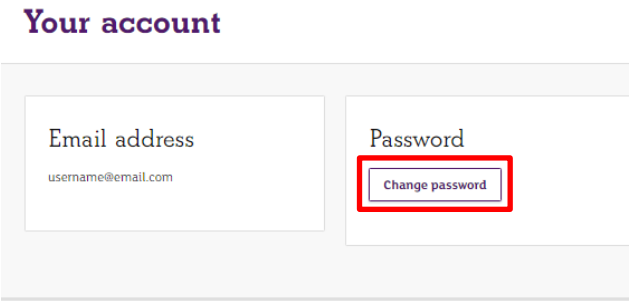


Step 2. Password changes

To change your password, click on **Your account** in your **Dashboard**.

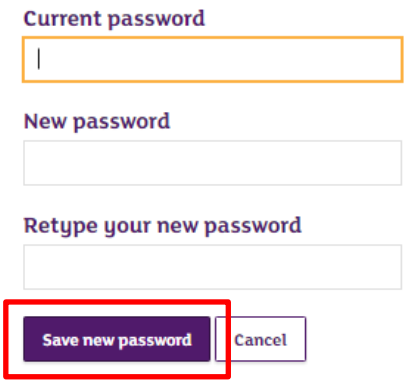


Click **Change password**.

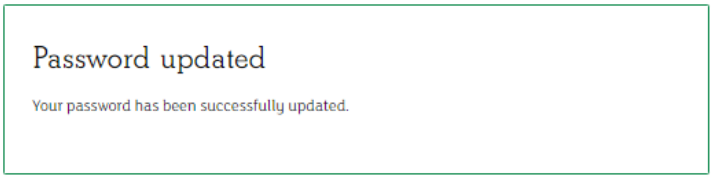


Enter your current password, followed by your new password, typed twice.

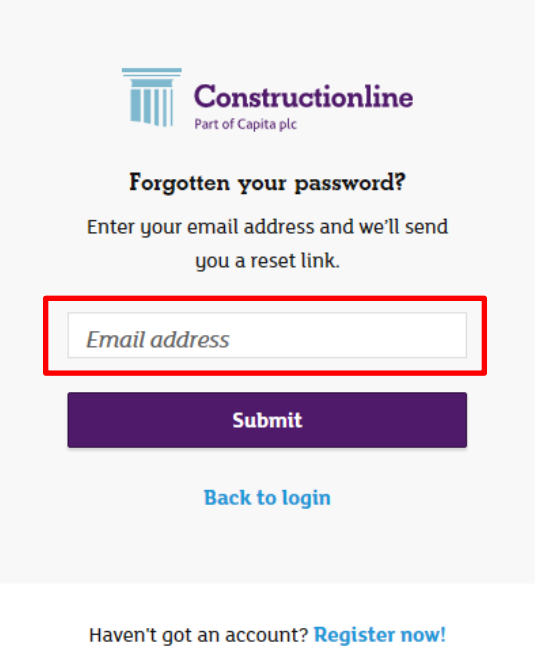
Then click **Save new password**.



Save password. If successful, an onscreen notification will appear confirming that your password has been updated.

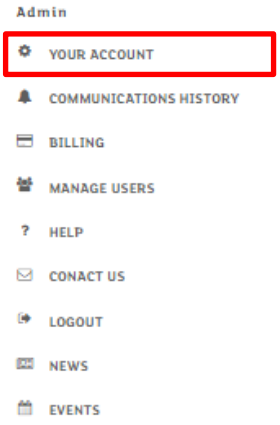


You'll be asked to enter an email address to allow the system to send you an email link to reset your password. Click **Submit** then follow the instructions on the email you receive.

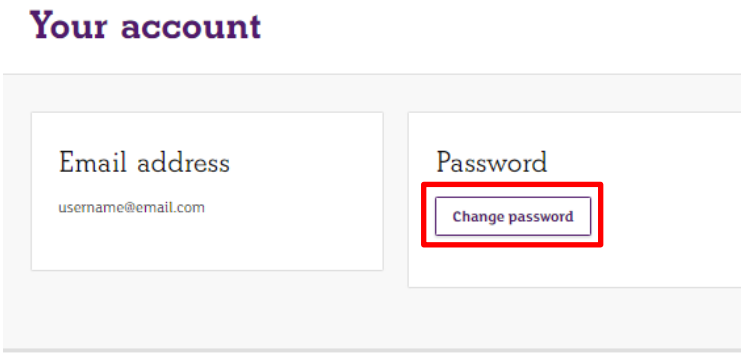


3.2.2 Password changes

To change your password, in your **Dashboard** click on **Your account**.

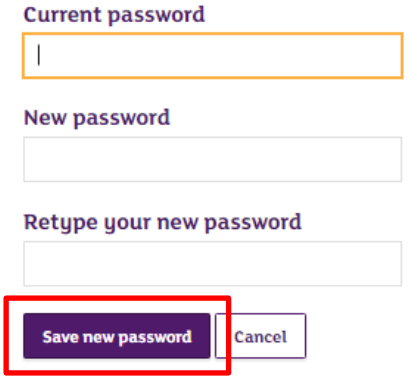


Step 1: Click change password



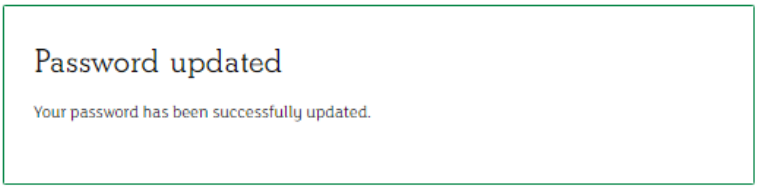
Step 1: Create new password

Enter your current password, followed by your new password, typed twice. Then click Save new password.



Step 2: Save password

If successful an onscreen notification will appear confirming that your password has been updated.



3.3 Resolving issues

Step 1: Review frequently asked questions (FAQs)

Frequently asked questions can be accessed through the following links:

1. Buyer FAQs
2. Supplier FAQs

If these don't resolve the issue, please proceed to step 2.

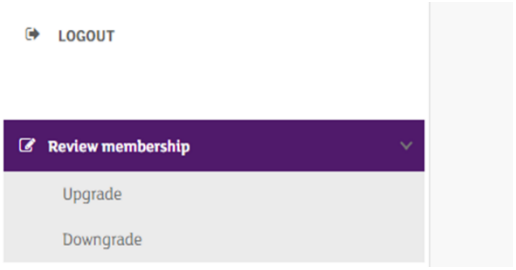
Step 2: Call us

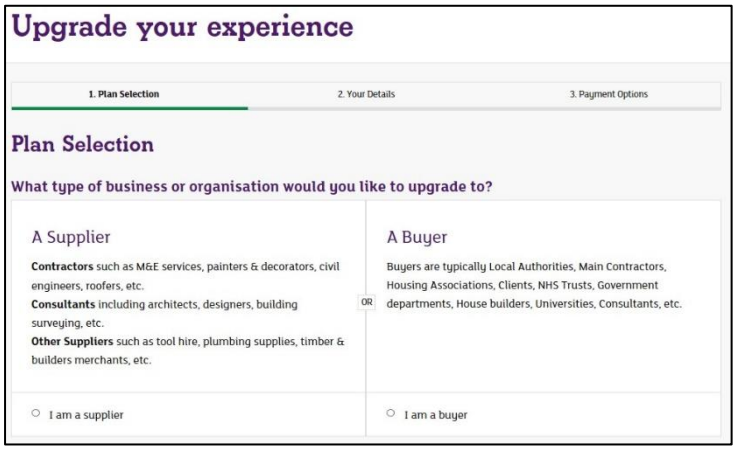
You can contact Constructionline on **0844 892 0313**. Using the telephone keypad, please select the team you require:

1. Interesting in joining
2. Progress of applications
3. Acclaim Accreditation
4. Membership
5. Buyer
6. Invoice payments
7. Other

3.4 Upgrading your membership

To upgrade or downgrade your membership, click the **Review membership** button under the **Admin** section of the menu on the left-hand side:





Should you wish to create a **buyer/supplier account,** please refer to the **Supplier member guide** to understand how to complete your supplier application.

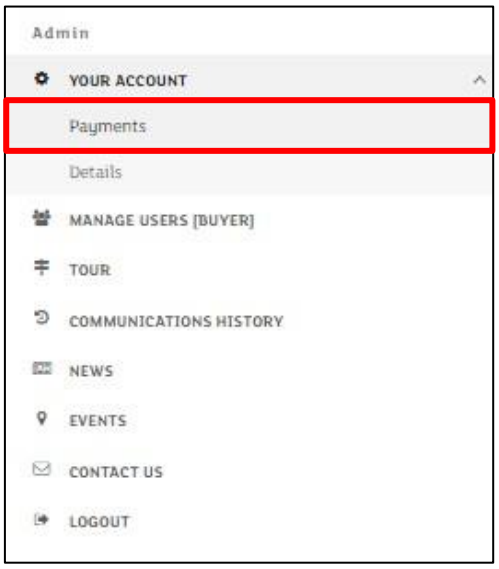
3.5 How to renew your account

Step 1: View payment notification

30 days before your annual renewal date, you will receive an invoice to pay.

Step 2: Locate invoice

To pay your invoice, click **Your account,** then click **Payments**.



Step 3: Select invoice

Select the appropriate invoice.

INVOICE	STATUS	ACTION
Invoice title	Paid	View invoice
Invoice title	Unpaid	Pay invoice
Invoice title	Unpaid	Renew invoice

Step 4: Choose payment option

Please refer to Section 1.1.