

in-tend

In-tend Contracts Database
System

Frequently Asked Questions
&
User Guide

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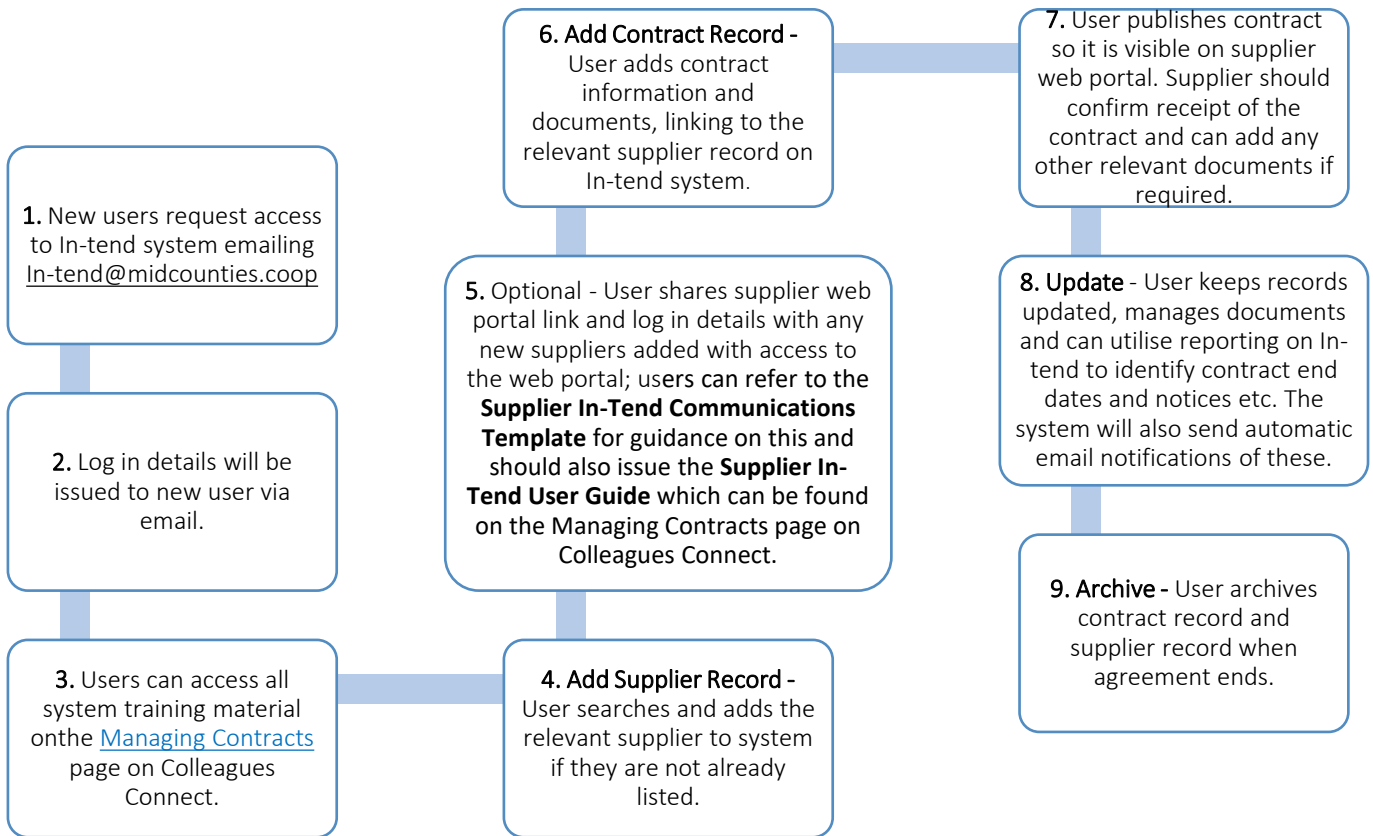
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1. An Introduction to In-Tend and the User Journey Process Map

In-tend is a contracts database which the Society introduced in 2021 to house all commercial contracts in a central location. The key aim of the system is to improve visibility and management of the Society’s contracts.

The system also allows our suppliers to have access to their contract and any related documents, via a secure web portal. The benefit of this is that both Midcounties and the supplier have access to the same, latest information in real time.

Below is a visual representation of how users interact with the In-tend contracts database system from the beginning to end of a contract:



It is important to note that any new contracts which are introduced from the beginning of December 2021 must follow the new Contract Management Process **before** they are uploaded to the In-tend system. This can be found on the [Managing Contracts](#) page on Colleagues Connect.

2. FAQs

1. General Information, Access, and Support

1.1 What is In-tend?

In-tend is a contracts database which the Society introduced in 2021 house all commercial contracts in a central location. The key aim of the system is to improve visibility of the Society's contracts and to enable Contract Managers and stakeholders' better access to key contractual information.

The system also allows our suppliers to have access to their contract and any related documents (e.g. signed Ethical Code of Conduct/Modern Slavery Statement/Schedule of Works/accreditations/insurances etc) via a secure web portal. The benefit of this is that both Midcounties and the supplier have access to the same, latest information in real time.

1.2 Who uses In-tend?

In-tend is predominantly used by Contract Managers across the Society. The criteria below also apply (colleagues can meet 1 or more of the below) but this is not an exhaustive list:

- Colleagues who are responsible for the administration of contracts
- Colleagues who are involved in negotiation and drafting of contracts
- Colleagues who are involved in managing relationships with supplier/s
- Colleagues who require oversight of the contracts (or groups of contracts) for their Trading Group/Support Service area/department

If you are not sure if you or a colleague should have access to the system, please email In-tend@midcounties.coop

1.3 How do I access the system?

Midcounties colleagues access the system via the following link:

<https://in-tendorganiser.co.uk/yourcoop/asp/itlogin.aspx>

Suppliers access the supplier web portal via the following link:

<https://in-tendhost.co.uk/yourcoop/asp/Home>

1.4 Do I need to be on VPN to access In-tend?

No, you don't need to be on VPN but you will need to use two factor authentication.

1.5 How do I request a log in for the system?

Colleagues can request access by emailing In-tend@midcounties.coop

1.6 How do I log in?

We have now implemented Single Sign On (SSO) with In-tend, meaning that it is automatically linked to your Active Directory (AD) account.

Your **Username** is your **Society email address**

Your **Password** is your **AD Password** (that you use to log into your system as normal)

To reset your password, please follow the normal process via FastPass.

1.7 What happens with log ins for movers and leavers?

The leavers forms on Service Now include access to In-tend and when a colleague leaves the Society their AD is disabled which means their In-tend access will be automatically removed. If a colleague is moving to another role please email In-tend@midcounties.coop to amend their access so they have visibility of the correct contracts.

1.8 What support is available?

There is a wealth of training and guidance material available on the Managing Contracts page on Colleagues Connect to support you with using the In-tend contracts database system, including:

- [In-tend User Journey Process Map](#) (in this document)
- [FAQs](#) (in this document)
- [User Guide](#) (in this document)
- Bitesize training videos
- Supplier User Guide
- Supplier Communications Template

Please refer to the guidance on the [Managing Contracts](#) page on Colleagues Connect in the first instance where you should find all the information you need. You also can find this page by clicking on 'How To' and then 'Managing Contracts' from the menu at the top of Colleagues Connect.

If you have any issues or need any further training please email In-tend@midcounties.coop

If you have any queries relating to the specifics or legalities of a contract, please contact the Legal team by emailing Legal@midcounties.coop.

1.9 Can I request a training session?

Yes, nominated colleagues will have had training sessions when the system was launched. If you were not involved in these, or simply need a refresher, the team will be happy to assist and run another session for you. Please email In-tend@midcounties.coop to arrange.

1.10 How do I use the In-tend system?

Please refer to the [User Journey Process Map](#) for a visual representation of how users interact with the In-tend contracts database system from the beginning to end of a contract.

2. Navigation

2.1 How do I search in the system?

A useful tip when searching for anything is to insert an underscore in the **Search** box, and then click the **Search** button, this will bring up everything you have access to in the system. To see the guidance on how to search for a supplier [click here](#), to see the guidance on how to search for a contract [click here](#).

2.2 Why are some areas of the system highlighted yellow?

Any areas which are highlighted yellow are mandatory fields which must be filled out by the user.

3. Uploading Supplier Information to In-tend

3.1 What should I call the supplier on In-tend?

This should match their legal entity. This can often be found on the contract, alternatively you can email Legal@midcounties.coop to check the correct name.

3.2 The supplier I am uploading is referred to by multiple names, or the legal entity does not reflect what we refer to the supplier as, what should I call it?

You should still insert the supplier's legal entity name as a priority. If it is useful for searching, you can also add any other names into the mandatory name field by splitting these out with a forward slash. For example – Montague Skyes Limited / PROFIT / Anti Dolus.

3.3 For the contract I am uploading, Midcounties are the supplier, how do I add the contract correctly?

You should attach the contract to 'The Midcounties Co-operative Limited' which is already set up as a supplier in the system for you. You should also remember to pick "For use where the other party is not a supplier" title in the 'Classification' tab.

3.4 Can the supplier see notes I am writing about them on the system?

The supplier will not be able to see any notes that you insert about an individual or the contract. [Click here](#) to see what the supplier can see on their web portal, and if you're unsure it's always best to check by emailing In-tend@midcounties.coop.

3.5 The supplier is visible on the Supplier page, but I am not able to search for the supplier when I am adding a contract, why?

It's likely you have forgotten to 'Accept' the supplier, you can revisit the guidance on how to do this [here](#).

3.6 Why can't I save the supplier record?

If at the end of completing all of the tabs, you click **OK** and the system keeps taking you back to one of the tabs and not letting you save, this means you have not filled in the mandatory fields correctly. You will need to double check the information you've inserted, amend appropriately and retry.

Another reason may be that you need to enable pop ups on your web browser.

4. Uploading Contract Information to In-tend

4.1 What contracts should be uploaded on the In-tend system?

The In-tend contracts database should be used to store all types of commercial contracts (excluding property leases, utilities contracts which are stored on the Affinity system, and any one off, low value agreements – e.g. webinars, training sessions). You can upload contracts or agreements where The Midcounties Co-operative acts as the supplier to customers/corporate entities, or where we have partnership agreements. If you are not certain whether a contract should be uploaded, please seek advice by emailing in-tend@midcounties.coop.

4.2 What types of documents should I upload to In-tend along with the actual contract?

The In-tend contracts database can be used to house a variety of documents (there are no restrictions on file types) relating to either the supplier and/or the contract. Users are encouraged to upload as much as possible so that the Society has thorough record. This can include, but is not limited to:

- Contract (signed by both parties and often negotiated), T&Cs (usually set by the supplier, signed by us and are non-negotiable – e.g. Microsoft, Facebook etc), Schedule of Works, Specifications etc. (where a contract is not present, any email trails with outline agreements should be uploaded in its place)
- Contract Management Process documents (Contracts Business Case, Summary of Key Terms doc, Risk Assessments, Finance Governance approval etc.)
- Tender documentation – any relevant documents from the tender or selection process (Questionnaire, Pricing Template, analysis etc.)
- Supplier due diligence (references, credit checks, Data Security Questionnaire etc.)
- Signed Ethical Codes of Conduct
- Any other related policies (IT/Data Protection etc.)
- Accreditations
- Health and Safety documents
- Insurances (this information will be uploaded and managed by the Insurance team)

- Account Management documents

Please be mindful when uploading documents, considering whether or not they contain internal confidential information and if they should be visible to the supplier. Users can follow the guidance on [adding documents](#) in the User Guide.

4.3 Can I upload any type of file to In-tend?

Yes, there are no restrictions on file types.

4.4 How do I edit documents on In-tend?

You can add, amend and archive documents by navigating to the [Document Storage](#) area.

4.5 I don't have a physical/formal contract to upload, or I have an incomplete contract with partial information, should I still upload this?

Yes, you should still add a contract record onto the system so the Society has sight of the agreement even where you don't have a copy of the contract. It is important to upload as much information as possible.

The Society recognises that there may be historic, incomplete contracts which don't necessarily align with our current standard and this is accepted. It's important to gain visibility of these so that any gaps can be addressed, and high-risk areas can be brought to our Legal team's attention. In-tend will allow us, for the first time, to have visibility of where this might be the case so it's really important that you upload all agreements for your area. Where a copy of the contract is not present, any email trails with outline agreements should be uploaded in its place or any other relevant material. If you require support or you are not sure how to upload a contract record where you might be missing the document or have incomplete information, please email In-tend@midcounties.coop.

4.6 Do I need to upload an agreement where we are 'piggy-backing' on a TCG contract?

Yes, even where The Co-op Group are responsible for the main contract, The Midcounties Co-operative will usually have an agreement resulting from this in the form of a sub-contract or a letter and this should be uploaded to In-tend.

4.7 What should I call the contract on In-tend?

The contract name should reflect the goods/services bought or supplied. Best practice is to keep the name concise and then insert as much detail as possible in the description to help other users to understand the contract. The system does not allow for duplicate names of contracts so you may need to insert the supplier name at the end of the contract name as a differentiator.

4.8 Will the system send reminders automatically when a contract is due to expire?

Yes, as long as you insert the expiry date and set up the contract correctly, the system will send emails to both you (and any other users you might wish to nominate) and the supplier, to

remind you of when the contract is due to end. You should make sure that you are selected in the 'Users' tab when editing the contract record to ensure you receive notifications.

You can also use the [reports](#) in the system at any time to see when a contract is expiring or for reminders of when you will need to serve notice.

4.9 I have a rolling contract, what do I enter in the end date and expiry fields when uploading the contract information?

To minimise risk the Society needs to ensure that contract records are reviewed on a regular basis. To support this, an end date should be inserted for ALL contract records (except for Travel Agency Agreements). For any records where you do not have/know the end date or where it is a rolling contract, you will need to ensure a date is inserted for review within 2 years.

4.10 I don't know the start date of the contract, what should I insert?

If you know the end date and duration of the contract you should work backwards to calculate the start date. If you do not have this information please contact the Legal team for advice by emailing Legal@midcounties.coop.

4.11 What should I insert as the value of the contract?

You need to insert the lifetime value of the contract (excluding VAT) and select the relevant currency. You should not insert a pound sign or any commas. In some cases, the value may not be straightforward (e.g. fluctuating volumes) so you should make a well-educated assumption and then you can also insert any useful additional notes to explain any anomalies.

In some instances you may be uploading commission based contracts where the supplier makes payments to us. You should still insert an estimated value here and add as much detail in the notes as possible to explain.

4.12 Why can't I save the contract record?

If at the end of completing all of the tabs, you click *Finish* and the system keeps taking you back to one of the tabs and not letting you save, this means you have not filled in the mandatory fields correctly. You will need to double check the information you've inserted, amend appropriately and retry.

If the system is taking you back to the 'Name' field repeatedly, it is likely the name you are entering is a duplicate of a contract already in the system. The system does not allow for duplicate names of contracts so you may need to insert the supplier name at the end of the contract name as a differentiator.

4.13 I have added a contract onto In-tend but I cannot see this listed on the Contracts Administration page, where can I find it?

Where a contract is associated with another, you will need to change the data filter to 'Show All' if your contract is not appearing in the list. If you are still not able to see your contract please email In-tend@midcounties.coop.

4.14 I have signed a new contract with an existing supplier/I have an addendum to the current contract. Do I need to archive the contract record and start a new one?

You do not need to archive the contract record if you have signed a new one with the same supplier and are simply extending the same contract, or if you have an addendum. In this instance you need to just add a contract extension to the record, amend any necessary information in the record, then upload a copy of the new signed contract/addendum and archive the old document. You can see the guidance on how to do this [here](#). However, if any contract terms have changed then it is best to archive the old record and start a new one entirely.

4.15 Do Personal Travel Agents and Locum Pharmacist contracts need to be uploaded to In-tend?

Yes, these agreements should be uploaded onto In-tend. To avoid the administrative burden of setting up each individual with a supplier record, the following suppliers have been set up to attach these agreements to for ease:

- Personal Travel Agents – Co-op Travel
- Locum Pharmacists – Co-op Pharmacy

If you have any queries regarding how to attach contracts to these, please email In-tend@midcounties.coop.

4.16 Do I need to set an expiry date for a signed Ethical Code of Conduct?

Yes, our Society standard is to obtain an updated signed copy of our Ethical Code of Conduct from suppliers every 2 years. You should set a reminder for expiry when uploading this as a document in the storage area to remind you and the supplier (if they have been given access to this and the web portal).

5. What Do Users Have Access To?

5.1 Can all users see all contracts in the system?

No, user access is restricted so that users can only see contracts which are relevant for their department. If you think you have incorrect access, please email In-tend@midcounties.coop.

5.2 I can see references to tendering in the system and on the supplier web portal, are we using this functionality?

The In-tend system has extensive functionality for tendering and supplier management, but we are not using this at this moment in time. We are focussing first on uploading our contracts

for visibility and enabling our colleagues to use the system confidently. The other elements of the system will be considered in the future.

6. Archiving

6.1 When should I archive a supplier and contract?

The contract record and supplier record should be archived when the agreement ends. The archiving process ensures that the contract is no longer visible in the current contracts list but the information still remains on the system for audit trail purposes. You should take care not to archive a supplier record if there are other agreements still in place, in this instance you will just need to archive your contract record.

6.2 How can I view archived records?

To view previously archived contracts you can follow [these](#) steps.

7. Supplier Web Portal

7.1 What suppliers are given access to the web portal to view contracts?

Only our existing and approved suppliers are given access to the web portal. When they sign in, they can only see the contracts which are relevant and have been assigned to them. Supplier access is not mandatory and contracts can be set up without this, but it is encouraged for maximum visibility.

If suppliers have any issues with their sign in details or access, they can use the 'forgotten password' function on the web portal or email you to reset this in the 'Individuals' tab on the Supplier Record.

Any new, prospective suppliers should register an interest with the Society by completing the 'Become a Supplier' form on our website - <https://www.midcounties.coop/legal/corporate-info/become-a-supplier/>. This allows the Procurement team to capture the information needed to share with the relevant colleagues across the Society in the first instance for consideration. This information is not currently uploaded onto In-tend to ensure that only our current suppliers are visible.

7.2 I have issued a supplier their log in detail to the supplier web portal, they now can't access the system, what should I do?

They can use the 'forgotten password' function on the web portal or email you to reset this in the Individuals tab on the supplier record.

7.3 The supplier can see tender related information on the web portal, does this mean we will be tendering electronically from now on?

Please advise the supplier that they should ignore these elements of the web portal at present, this is explained in the supplier guidance. Unfortunately, we don't have the ability to hide them.

The In-tend system has extensive functionality for tendering and supplier management, but we are not using this at this moment in time. We are focussing first on uploading our contracts for visibility and enabling our colleagues to use the system confidently. The other elements of the system will be considered in the future.

7.4 When a supplier is archived at the end of a contract, do they lose access to the web portal?

Yes, once you have archived them you don't need to take any further action as this automatically de-register them from the web portal.

7.5 Why can't I edit a document a supplier has uploaded via their web portal?

You may need to navigate to the Supplier Document Storage area, rather than the Contract Document storage area to find the document and edit it by clicking on *Details*.

3. User Guide

This section of the document is a detailed step by step guide for using the In-tend contracts database system. This is broken down into sections so you can navigate to what you need to find. You can also refer to the bitesize training videos on Colleagues Connect if you prefer this method of learning.

1. Signing in and out of the system

Signing in:

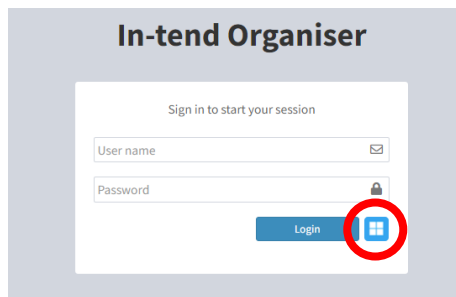
Colleagues can request access to In-tend by emailing in-tend@midcounties.coop. The system can then be accessed via the following link:

<https://in-tendorganiser.co.uk/yourcoop.aspx/itlogin.aspx>

In-tend is integrated with Single Sign On (SSO), meaning that it is automatically linked to your Active Directory (AD) account. To log in:

- Your **Username** is your **Society email address**
- Your **Password** is your **AD Password (that you use to log into your system as normal)**

If this log in screen appears, please select the small window icon to bring up our Midcounties log in page:

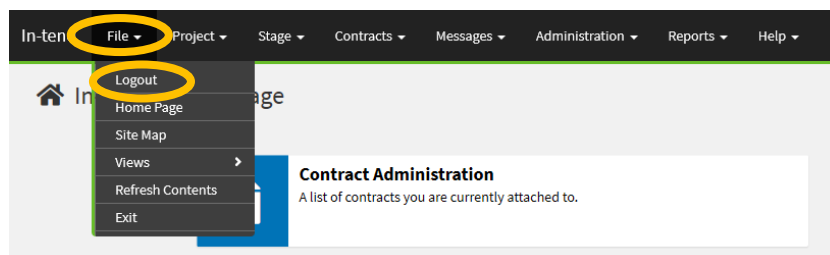


To reset your password please follow the normal process via FastPass.

Signing out:

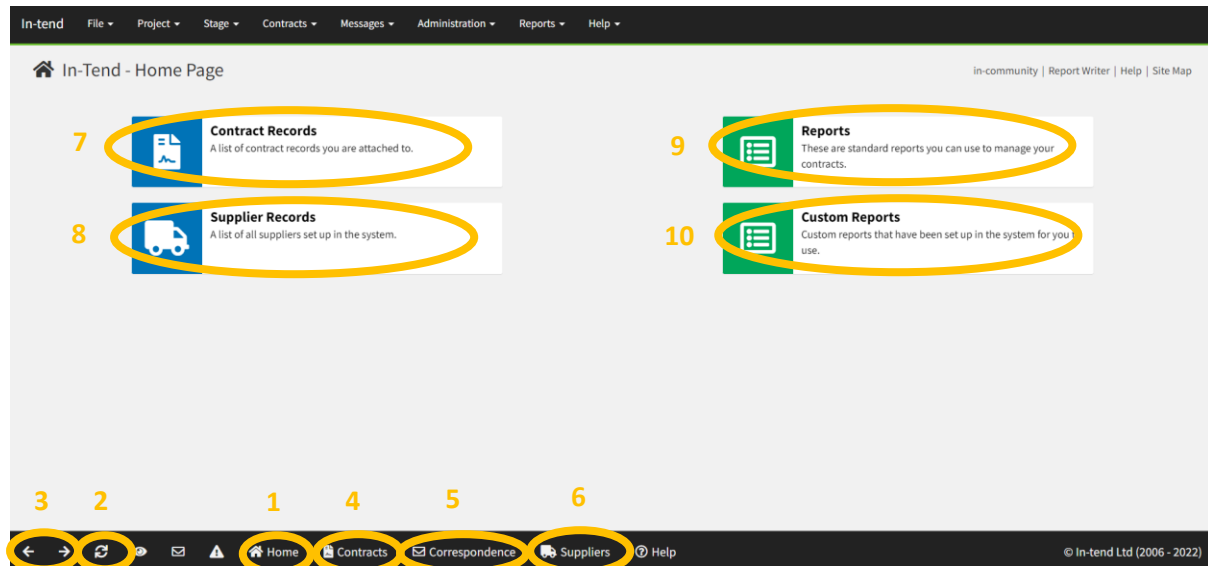
You can sign out of the system by clicking *File* in the top left-hand side of the screen and then

Logout:



2. Navigating the system

The homepage is designed to give you access to the key areas of the system you will use. Please see the below highlighted and numbered areas for an overview of the navigation functions:



Let's start with the main banner across the bottom of the screen:

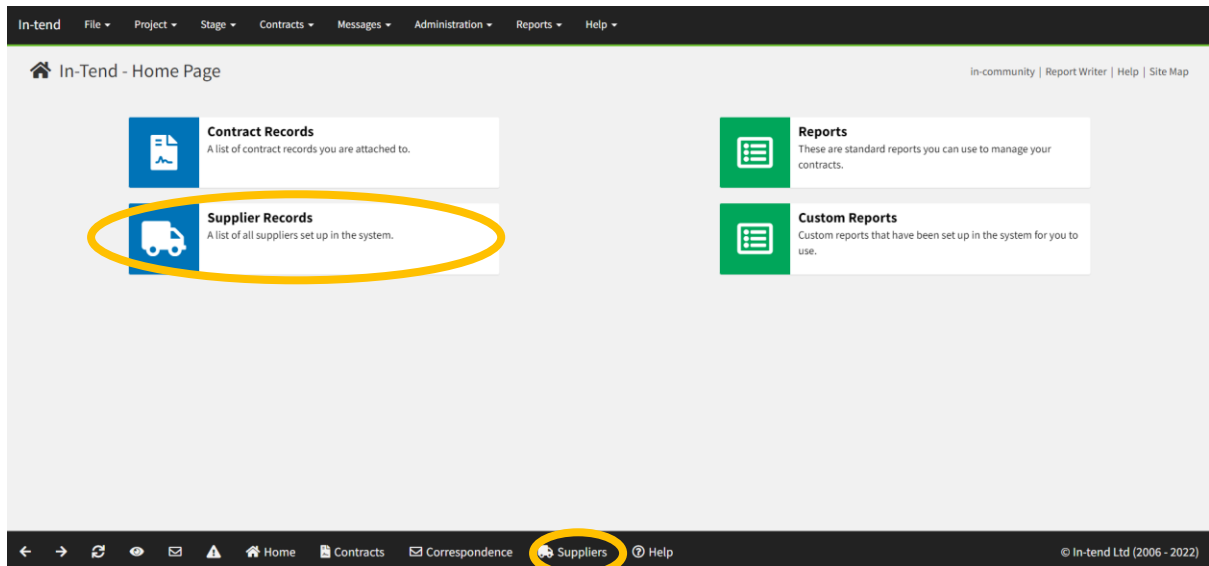
1. This **Home** button will bring you back to the above homepage if you click this at any point when you are in the system.
2. This will refresh the page you are on.
3. These arrows allow you to navigate back and forward to the pages you have been on in the system.
4. This **Contracts** button will take you to the list of contract records that are visible to you in the system (you can only see contracts you have been assigned to).
5. This **Correspondence** button will show any correspondence you have received from your suppliers who are using the web portal.
6. This **Supplier** button will take you to the list of existing supplier records in the system (unlike contract records, you will be able to see all suppliers).

Now let's look at the homepage buttons in the middle of the screen:

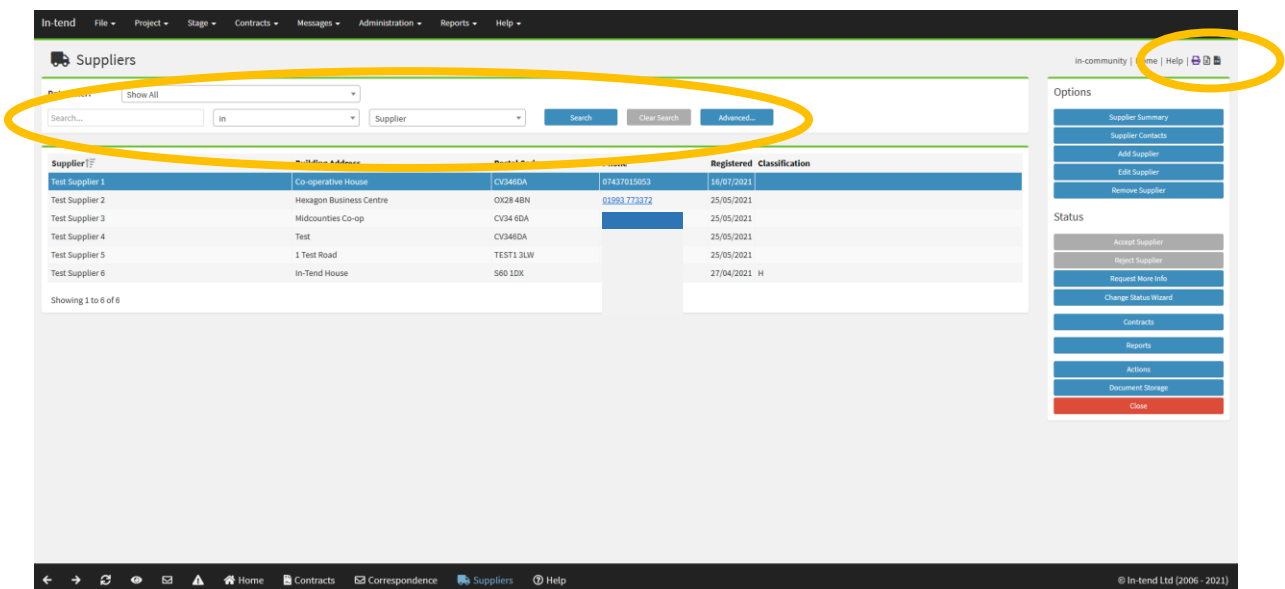
7. This **Contracts Records** button will take you to the same area as number 4, so if you click here, you will see a list of contract records that are visible to you in the system.
8. This **Supplier Records** button will take you to the same area as number 6, so if you click here you will see all supplier records in the system.
9. This **Reports** button will take you to a list of standard reports which are available within the In-tend system.
10. This **Custom Reports** button is where you can access useful reports that have been set up for you to use. This includes contracts which are due to expire in the next 12 months.

3. Searching for a supplier record

To search for a supplier, you need to click on *Supplier Records* on your homepage or the *Supplier* button on the banner at the bottom of your screen:



This will bring up the full list of supplier records in the system. All users have access to all suppliers. You can use the Data Filter bar highlighted below to search for a specific supplier you are looking for by filling in the relevant boxes and clicking the *Search* button:



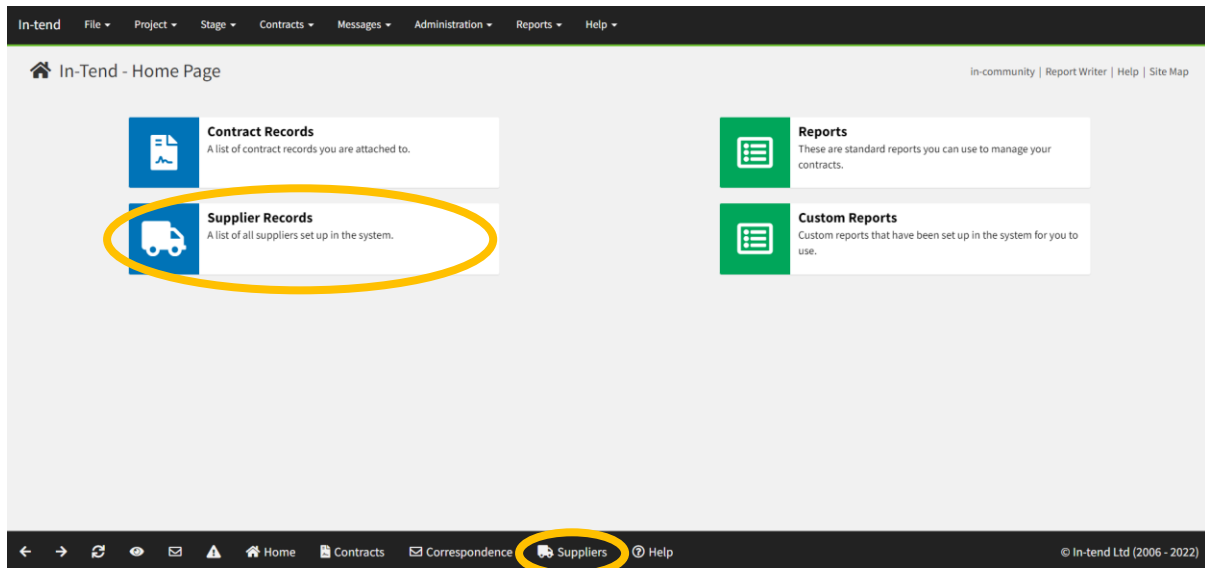
A useful tip if you want to search for all suppliers, is to insert an underscore in the *Search* box, and then click the *Search* button. Another useful function here is that you can export this information into a printable, Excel or CSV file by clicking on the buttons at the top right-hand side of the screen and following the steps to download.

You can double click into the supplier summary to see the record information. If you wish to access and amend the supplier record, please refer to the guidance on this by [clicking here](#).

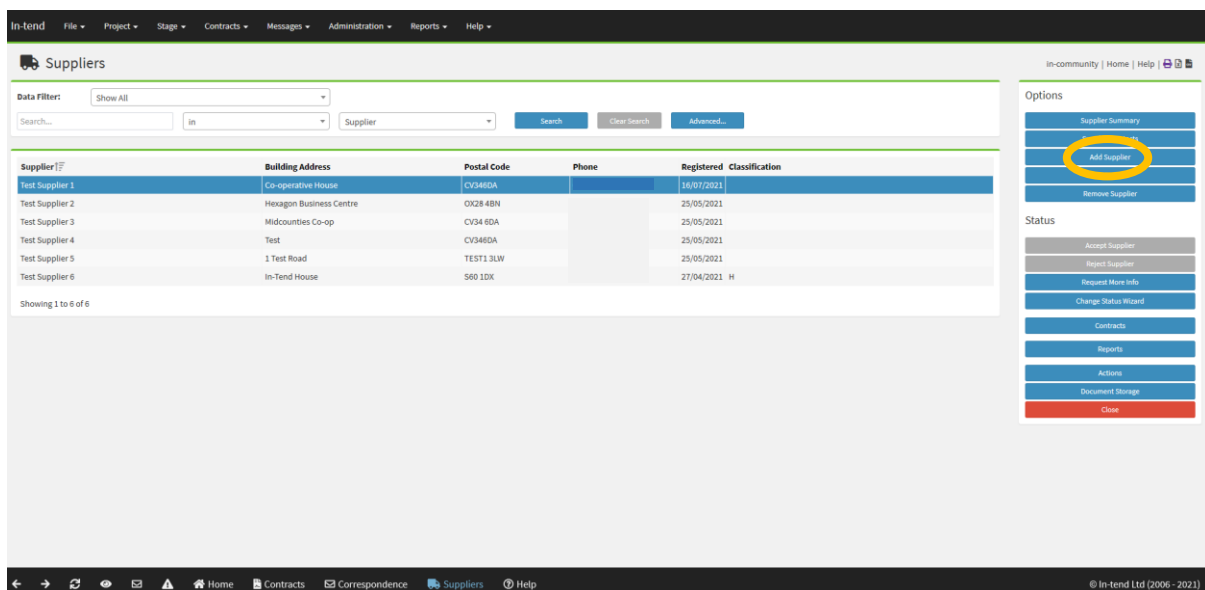
4. Adding a supplier record

Before you can upload a contract record on the In-tend system, you need to check that the relevant supplier is listed. This is because the system works in such a way, where any contract uploaded needs to be attached to a supplier. You can follow [these steps](#) to check if the supplier is already set up in the system.

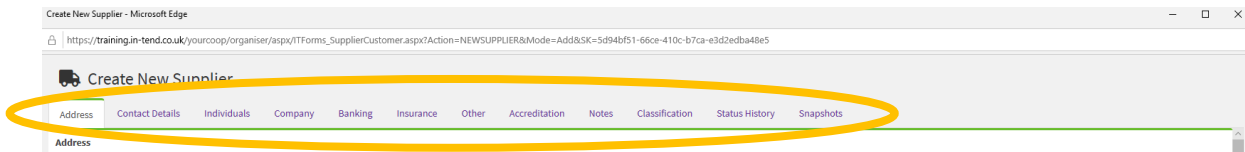
Where the supplier is not yet set up, you need to click on **Supplier Records** on your homepage or the **Supplier** button on the banner at the bottom of your screen:



This will bring up the full list of suppliers in the system. Next, you need to click the **Add Supplier** button on the right-hand side:



This will bring up a pop-up window for you to complete. Please note the multiple tabs across the top of the screen that you will need to work through:

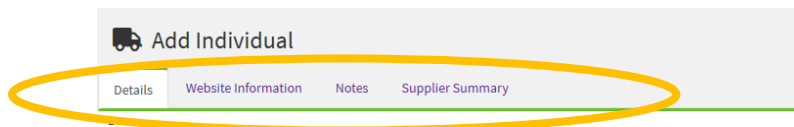


Any field which is highlighted in yellow is mandatory and must be completed. Best practice is to insert as much information as possible in any field, regardless of whether it is mandatory. You should now work through each of the tabs, remembering to scroll to the bottom of each one as you complete the fields.

Address Tab – As a minimum you need to complete the name (this should match the supplier’s legal entity), address, postcode and country fields. Please leave the ‘Archived’ box unticked as you scroll down. Finally, select the regions associated with the supplier. Then click on the next tab at the top of the window.

Contact Details – As a minimum you need to insert the supplier’s telephone and an email address and select if the supplier will access the web portal. Then click on the next tab at the top of the window.

Individuals – Setting up an individual means that you are giving the supplier access to the secure web portal. Supplier access is not mandatory and contracts can be set up without this, but it is encouraged for maximum visibility. To do this, click the **Add Individual** button on the right-hand side, this will bring up another pop-up window for you to complete. This section is important as this is the information that you will need to share with the supplier so they can access web portal. Again, you need to note the multiple tabs for this:



- Details – You need to fill in the first name and the surname of the person you are giving access to, along with their email address (usually the Account Manager). Then please click on the next tab at the top of the window.
- Website Information – Please select the ‘Allowed website access’ box. This will then enable you to enter a temporary password for the individual. Remember these details so that you can inform the supplier once the set-up process is complete. Users can refer to the **Supplier In-Tend Communications Template** for guidance on this and should also issue the **Supplier In-Tend User Guide** to the supplier. The supplier will need to change their password when they first sign into the web portal. Moving forward, the supplier can use the ‘forgotten password’ function on the web portal or you can advise them to contact In-tend@midcounties.coop if they have any access issues. Then please click on the next tab at the top of the window.
- Notes – This is not mandatory and the supplier will not be able to see these.
- Supplier Summary – Again, this is not mandatory, but you can insert any useful notes here also and choose whether to show these on the supplier summary page.
- Once you’ve completed these tabs, you can click **OK** on this pop-up window.

This will take you back to the Individuals tab where you should now see a row has been added. You can add as many individuals as you need to and you can also edit their records or remove them by highlighting the relevant row and then using the menu functions on the right hand side of this tab. Once you have finished please click on the next tab at the top of the window.

Company – There are no mandatory fields to complete here, but if you have access to this information it is useful to populate wherever possible. Then please click on the next tab at the top of the window.

Banking – You do not need to complete this tab as all of this information is held in our IFS system.

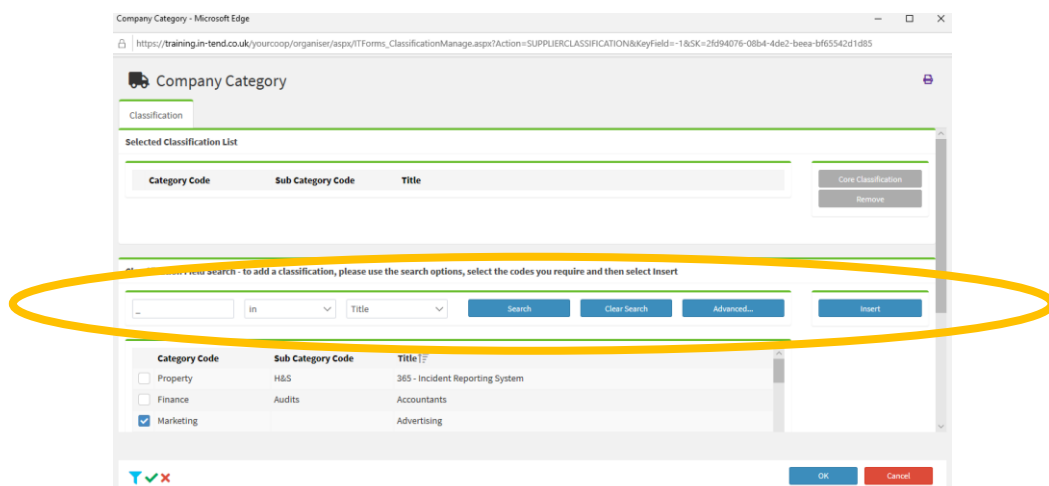
Insurance – You do not need to complete this tab as all of this information is held by our Insurance team.

Other – There are no mandatory fields to complete here, but if you have access to this information it is useful to populate wherever possible. Then please click on the next tab at the top of the window.

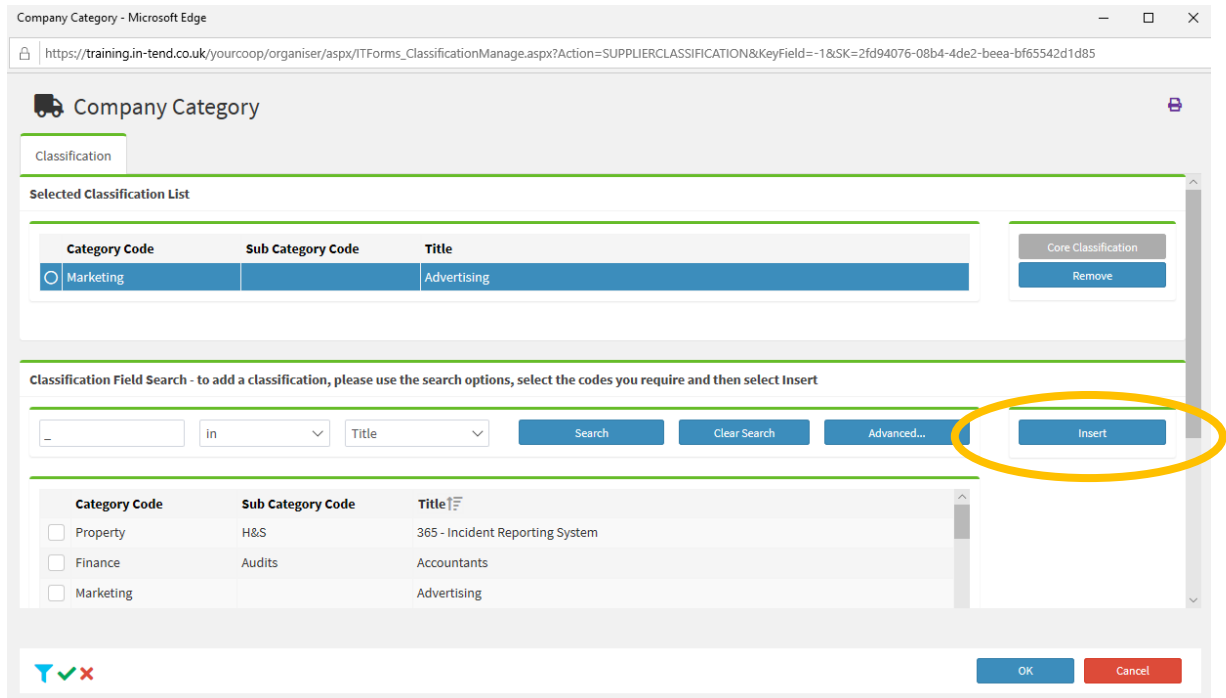
Accreditation – There are no mandatory fields to complete here, but if you have access to this information it is useful to populate wherever possible. Then please click on the next tab at the top of the window.

Notes – There are no mandatory fields to complete here, but you can use this section for any useful notes about the supplier. Then please click on the next tab at the top of the window.

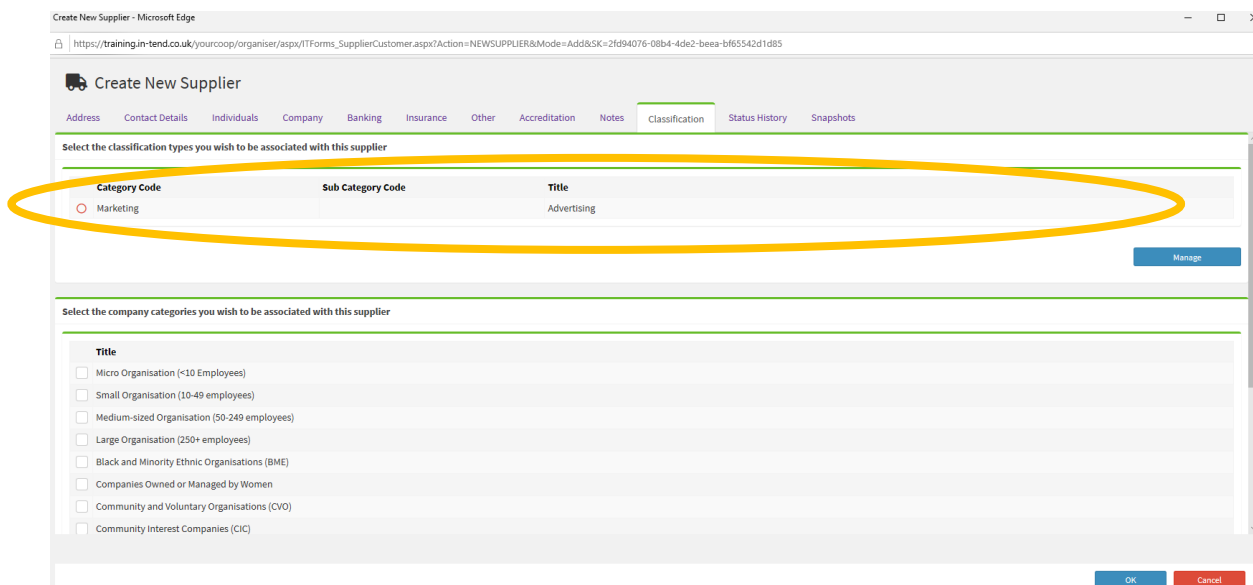
Classification – Please click on the *Manage* button on the right-hand side, this will open up the below pop-up window. You will need to search for the right classification for this supplier based on the goods or services they provide (this can be more than one). You can use the search bar highlighted below to search for the classification you are looking for, by filling in the boxes you need and clicking the *Search* button. A useful tip if you want to search for all classifications in the system, is to insert an underscore in the *Search* box, and then click the *Search* button, you can then scroll through them all. If you are unable to find the right classification for the supplier, please email In-tend@midcounties.coop



Once you have found the right classification (you can add more than one as appropriate), please tick the box next to the correct one to select it and then click the *Insert* button so that it appears at the top of the pop-up window in the box that was previously empty. In this instance, we have chosen and inserted Advertising under Marketing:



When complete, click *OK* at the bottom of this pop-up window. This will return you back to the original tabs you were working on and you will now see the classification you've chosen appear as below:



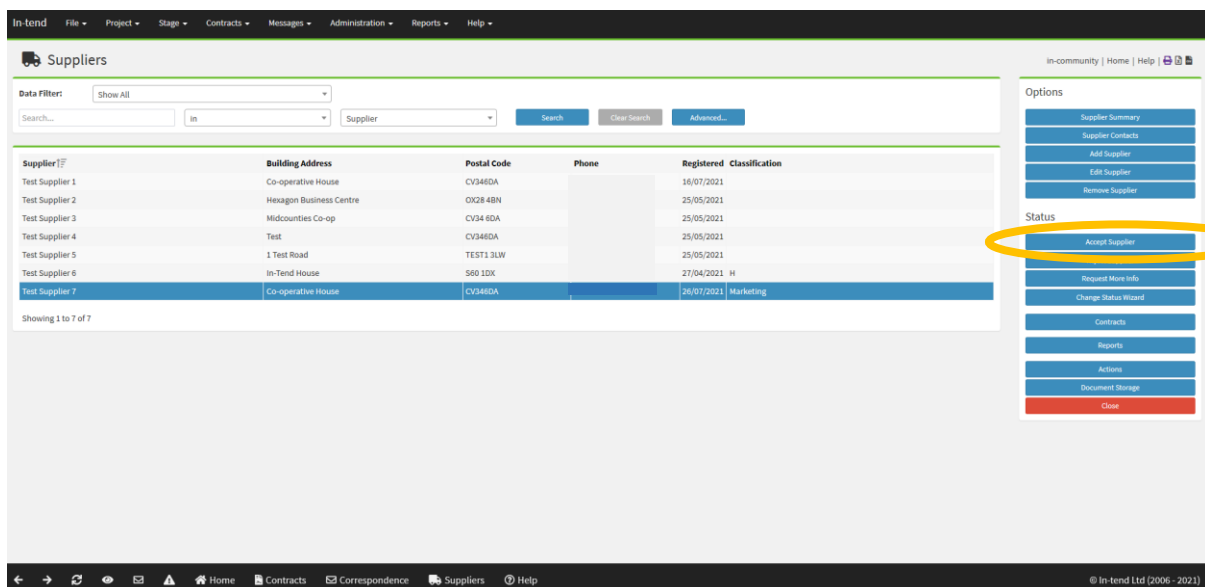
Then please click on the next tab at the top of the window.

Status History – You do not need to fill in anything on this tab, this provides an overview of any status changes which are made to the supplier in the future. Please click on the next tab at the top of the window

Snapshots – You do not need to fill in anything on this tab, this provides an audit trail of any edits which are made to the supplier in the future.

You will now need to click the **OK** button on the bottom right-hand side of the pop-up window. The system will prompt you to go back to the tabs if you have missed any mandatory information. If you have filled this in correctly, the system will take you back to the supplier screen where you should now see your new supplier listed.

IMPORTANT FINAL STEP - You will need to highlight the supplier you have just added and click the **Accept Supplier** button on the right-hand side as shown below:



This is an important step in the process and if not done, then the supplier will not show when you are adding a contract. When you click this button a pop-up window will appear for you to check all of the information you have added for the supplier is correct. Once you are satisfied these are correct you can click **Accept Supplier** in the pop-up window.

Now your supplier has been added to the system you can proceed to add a contract and any documents associated to them. Remember, you will need to provide the supplier with their temporary log in details. Users can refer to the **Supplier In-Tend Communications Template** for guidance on this and should also issue the **Supplier In-Tend User Guide** to the supplier.

5. Amending a supplier record

You will first need to [search for the supplier](#).

To see a supplier's details, which contracts and documents are linked to a supplier, make amendments and request documents from a supplier, you can highlight the supplier name in the row on the screen by clicking on it, and then click the **Supplier Summary** button on the right-hand side as shown below:

The screenshot shows the 'Suppliers' page in the In-Tend system. At the top, there is a navigation bar with 'In-tend' and various menu items. Below the navigation bar, there is a search area with a 'Data Filter' dropdown set to 'Show All', a search input field, and a 'Supplier' dropdown. A table lists six test suppliers with columns for 'Supplier', 'Building Address', 'Postal Code', 'Phone', 'Registered', and 'Classification'. On the right-hand side, there is an 'Options' menu with several buttons. The 'Supplier Summary' button is circled in yellow.

This will then take you to the below summary screen:

The screenshot shows the 'Supplier Summary' page for 'Test Supplier 1'. The supplier name is circled in yellow and numbered 1. Below the name, there is a table of supplier details including 'Supplier', 'Building Address', 'Street Address', 'Phone', 'Company Registration Number', 'VAT Number', 'Publish e-Mail', 'Classification', and 'Last Logged In'. To the right of the details, there is an 'Options' menu with several buttons. The 'EDR Supplier' button is circled in yellow and numbered 5. The 'New Correspondence' button is circled in yellow and numbered 6. The 'Correspondence Summary' button is circled in yellow and numbered 7. Below the details, there are sections for 'Contacts' (numbered 2), 'Documents' (numbered 3), and 'Contracts' (numbered 4).

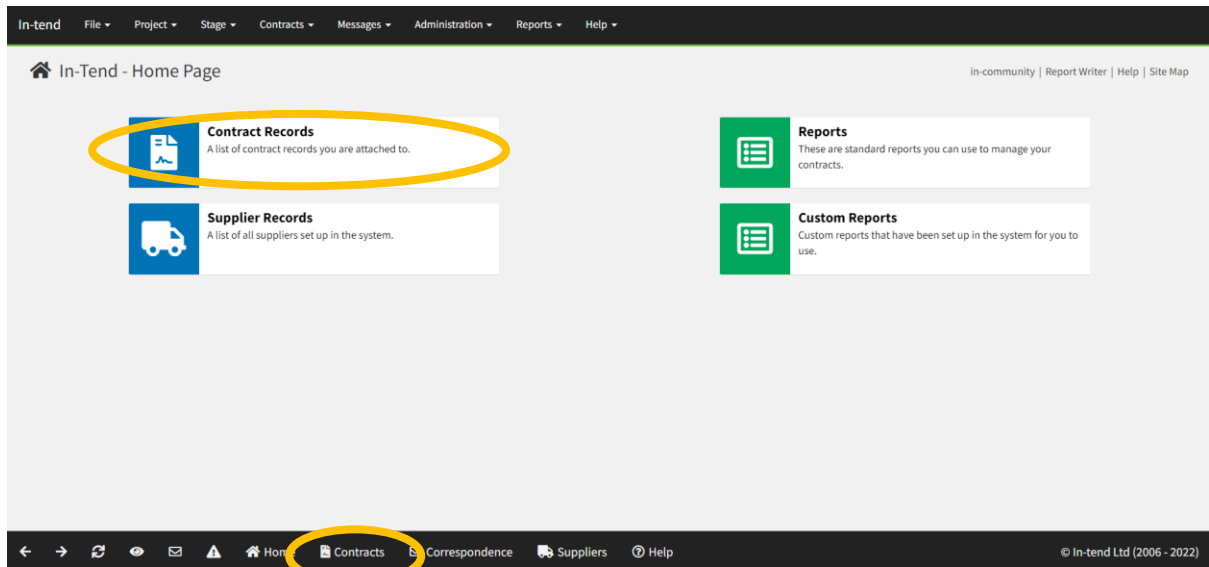
From here, you can access the supplier's information and perform various functions. Those which are highlighted can be used:

1. This section shows the supplier details that have been inserted by the user.
2. This section shows the supplier's contacts.

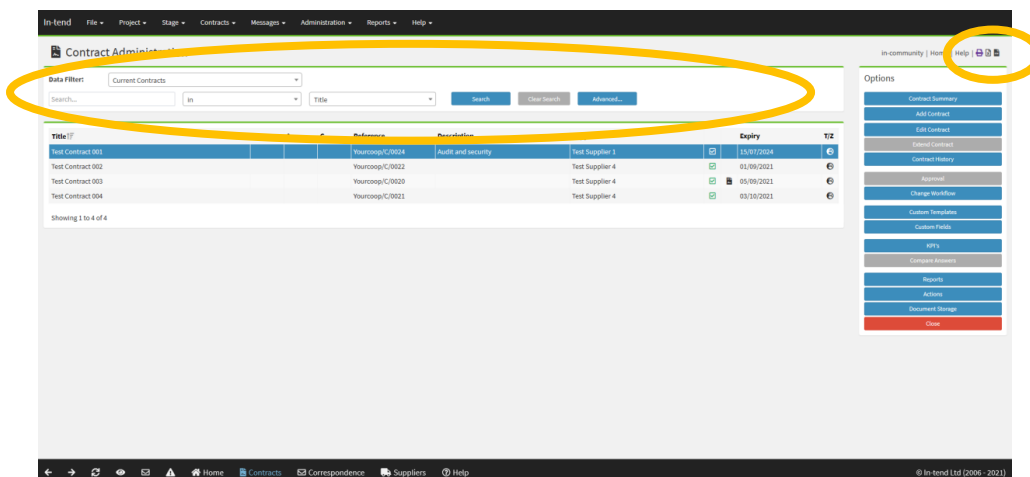
3. This section shows any documents which are linked to the supplier and their status. Although most documents are held in the contract record.
4. This section shows the contract records that the supplier is linked to (there can be more than one).
5. If you click the *Edit Supplier* button this will enable you to edit the supplier's information. Once you have made any changes you need to click **OK**. Any changes you make will appear as an audit trail in the system in the 'Snapshots' tab.
6. If you click the *New Correspondence* button, you can send correspondence to a supplier within the system and they can respond via their web portal.
7. All correspondence with a supplier can be seen by clicking on the *Correspondence Summary* button.

6. Searching for a contract record

To search for a contract on In-tend, select the *Contracts Records* or the *Contracts* button on the homepage (both will direct you to the same place) as below:



This will bring up the full list of contract records in the system that you have access to. You can use the Data Filter bar highlighted below to search for a specific contract you are looking for by filling in the relevant boxes and clicking the *Search* button. A useful function here is that you can export this information into a printable, Excel or CSV file by clicking on the buttons at the top right-hand side of the screen and following the steps to download:



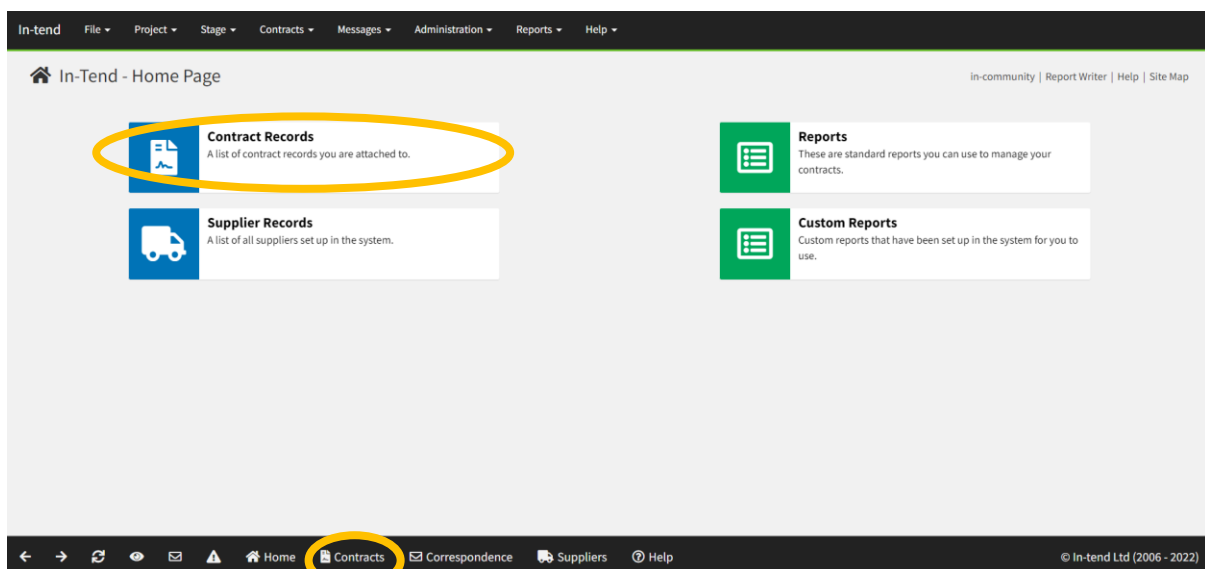
A useful tip if you want to search for all contracts visible to you, is to insert an underscore in the *Search* box, and then click the *Search* button. Sometimes you may need to change the data filter to 'Show All' if your contract is not appearing. If you still cannot see your contracts or you believe your access is incorrect, please email In-tend@midcounties.coop

If you wish to access Records and amend the contract record, please refer to the guidance on this by clicking [here](#).

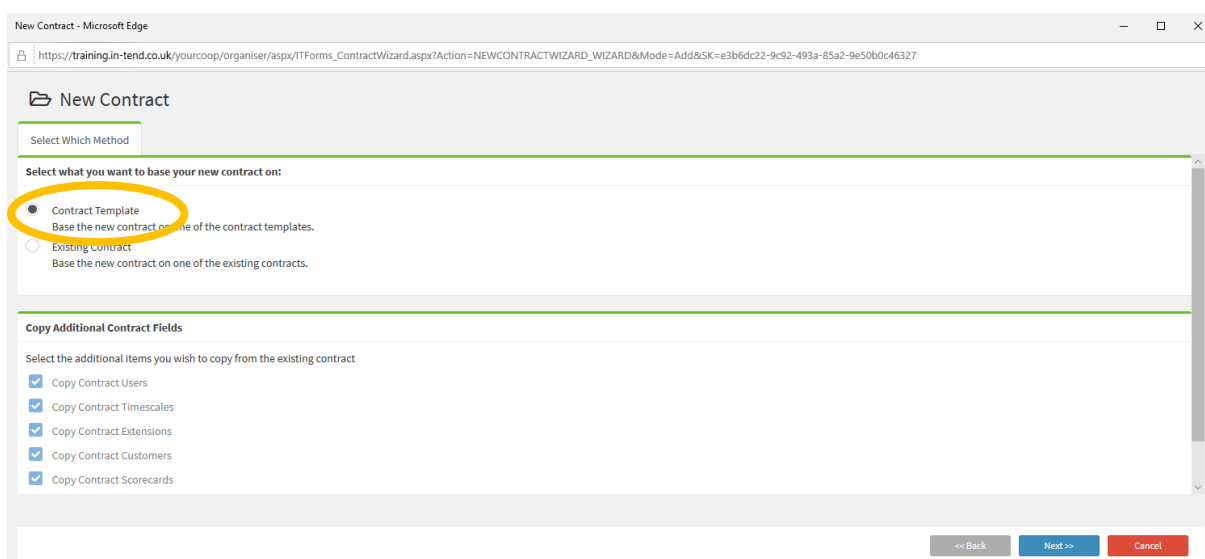
7. Adding a contract record

Remember, before you can add a contract record on the In-tend system, you need to check that the relevant supplier is listed. This is because the system works in such a way, where any contract uploaded needs to be attached to a supplier. Please see guidance on [how to search for a supplier](#) and [how to add a supplier](#).

Firstly, you need to navigate to the contracts section of the system. You can select the **Contract Records** or the **Contracts** button on the homepage (both will direct you to the same place) as below:

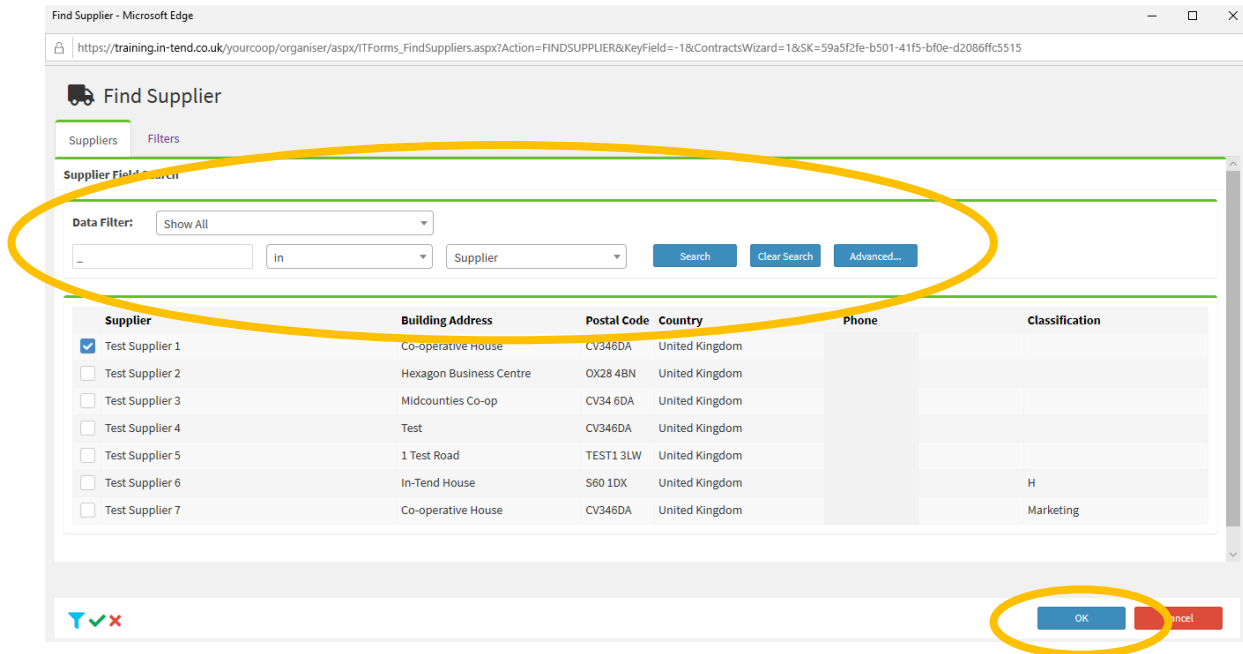


This will bring up the full list of contracts in the system that you have access to. You will need to select **Add Contract** on the right-hand side. This will bring up the pop-up window below. You should ensure that **Contract Template** is ticked and then click **Next**.



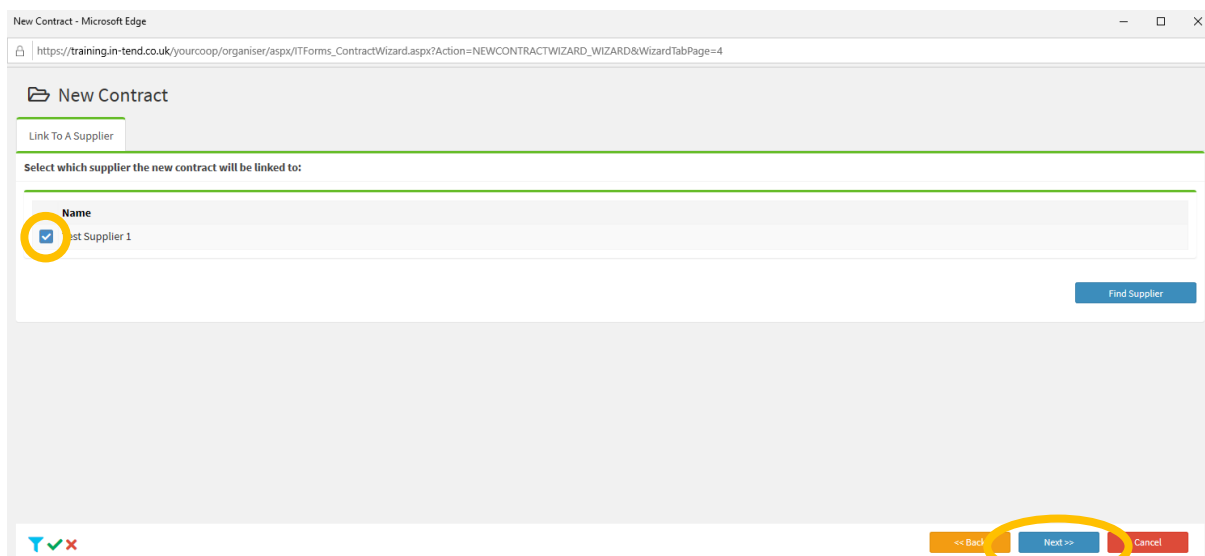
You then need to select **The Midcounties Co-operative Contract** and then click **Next**.

This will then bring you to the part where you select which supplier you are attaching the contract to. You need to click **Find Supplier** on the right-hand side which will bring up the page below. Remember, if your supplier isn't showing, this is likely to be because you have forgotten to 'Accept' the record when you added it onto the system. You can revisit these steps here - [how to add a supplier](#).

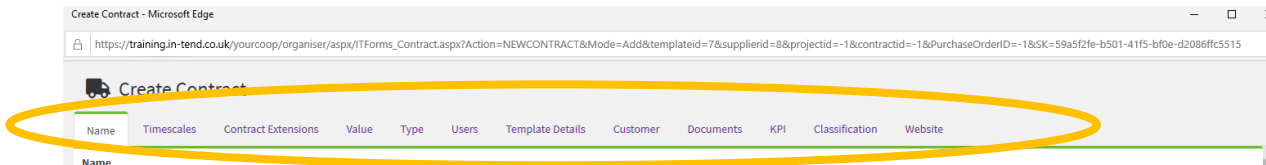


You can use the Data Filter bar highlighted above to search for a specific supplier you are looking for by filling in the relevant boxes and clicking the **Search** button. A useful tip if you want to search for all suppliers, is to insert an underscore in the **Search** box, and then click the **Search** button. Once you have found the correct supplier, tick the box next to the supplier's name and then click **OK**. If Midcounties are the supplier for the contract you are uploading, please see the guidance [here](#).

You should now see the supplier appear on the page you were originally on. You now need to tick the supplier's name on this page and click **Next** as below:

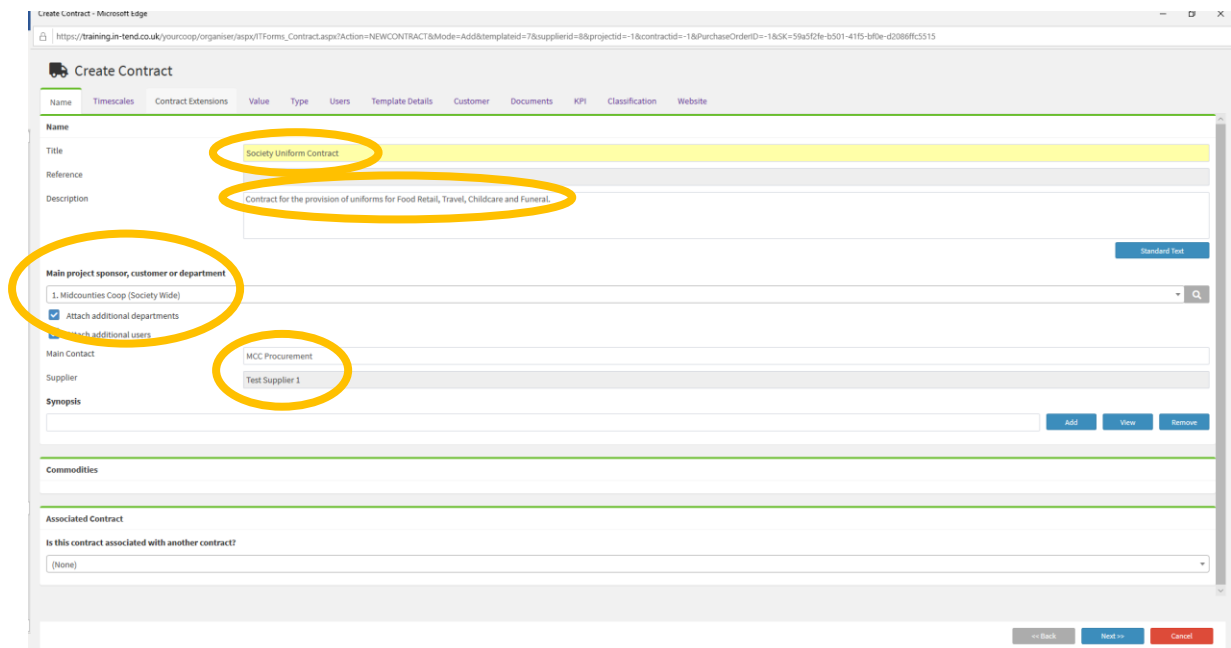


This will bring up a pop-up window for you to insert all of the contract information. Please note the multiple tabs across the top of the screen that you will need to work through:



Any field which is highlighted in yellow is mandatory and must be completed. Best practice is to insert as much information as possible in any field, regardless of whether it is mandatory. You should now work through each of the tabs, remembering to scroll to the bottom of each one as you complete the fields.

Name – As a minimum you need to complete the title of the contract, this should be a clear and concise overview of what the contract covers (i.e. goods/services purchased). The reference will auto populate once you have created the contract. You should then insert a description with as much information as possible. **Then, select which parts of the Society this contract applies to by using the drop down list, this will determine if other colleagues can view the contract and is an important step.** If you do not need to attach any additional departments you can untick this box. Please keep 'Attach additional users' ticked. Your name will auto-populate as the main contact and you should see the supplier you selected already listed. Once completed this should look like the below:



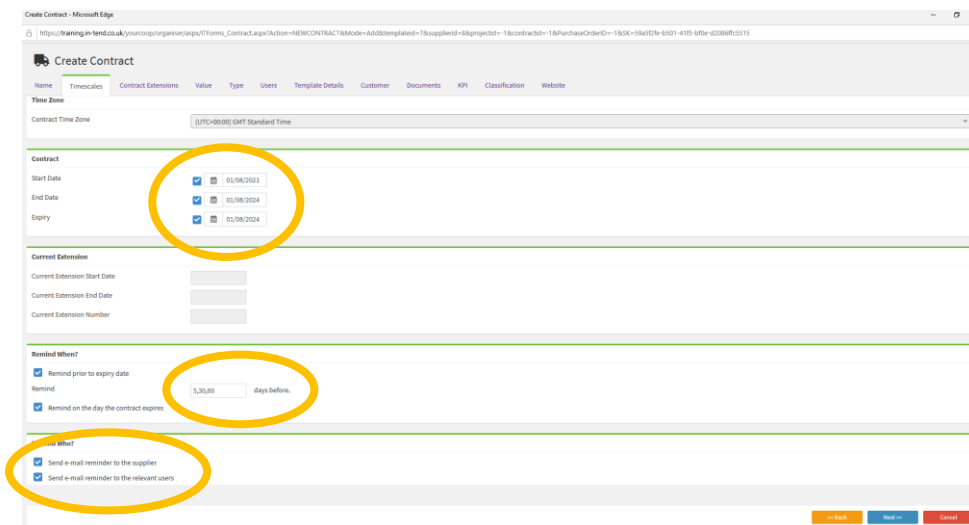
You can also choose if the contract is associated with another in the system. Once completed, please click **Next** or click on the next tab at the top of the window.

Timescales – Here, you need to tick the boxes for start, end and expiry and then insert the relevant dates:

- Start Date – this is the date the contract commenced

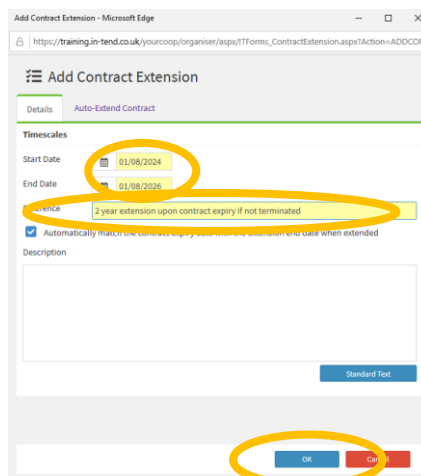
- End Date – this is the end date of the contract. To minimise risk the Society needs to ensure that contract records are reviewed on a regular basis. To support this, an end date should be inserted for ALL contract records (with the exception of Travel Agency Agreements). For any records where you do not have/know the end date or where it is a rolling contract, you will need to ensure a date is inserted for review within 2 years.
- Expiry – this should match the end date of the contract.

You then need to set when you would like the system to remind you, the supplier and any associated users that the contract record is expiring. You can insert multiple days in the field below by inserting the numbers with a comma in between and no spaces. **If you do not wish for the supplier to receive alerts ensure the relevant box is unticked below.**



Once completed, please click **Next** or click on the next tab at the top of the window.

Extensions – On this tab you can insert any contract extensions by clicking **Add Extension**. This will bring up a pop-up window for you to complete. As a minimum you need to insert a start and end date and a reference for the extension, then click **OK**. In this instance, we have inserted a 2 year contract extension after expiry:



This will then appear in the tab you were originally on and then you need to click **Extend Contract** in the menu on the right-hand side. Once completed, please click *Next* or click on the next tab at the top of the window.

Value – Here, you need to insert the lifetime value of the contract (excluding VAT) and select the relevant currency. You should not insert a pound sign or any commas. In the example below, the value of the uniform contract is estimated to be £250k each year over a 3 year contract. You can also insert any useful additional notes to explain any anomalies:

Once completed, please click **Next** or click on the next tab at the top of the window.

Users – This tab allows you to select other users who require system email alerts for the contract. You can scroll through the list of users or use the Data Filter bar to search for a specific colleague for by filling in the relevant boxes and clicking the **Search** button. Once you have found the colleague(s), you will need to tick the box next to their name, this will ensure they receive system email alerts for this contract. For example:

First Name	Surname	Groups	System Email Alerts	Custom Field Email Alerts
<input checked="" type="checkbox"/> MCC	Procurement	Contract Managers Group	Receive	Receive

You as the user uploading the contract, will be automatically selected to receive system notifications when you save the record. Once completed, please click **Next** or click on the next tab at the top of the window.

Template Details – This tab is particularly important as it allows our Legal team to review the risk associated with contracts and can prioritise those which require review and support. The majority of fields on this tab are all mandatory and it's very important to be as accurate as possible when completing these. The Society recognises that there may be historic, incomplete contracts which don't necessarily align with our current standard and this is accepted. It's important to gain visibility of these so that any gaps can be addressed, and high-risk areas can be brought to our Legal team's attention. Please do not guess the answers, if you don't have

the information or you are uncertain, it is always best to select 'Not sure' rather than select incorrectly. The following fields should be completed:

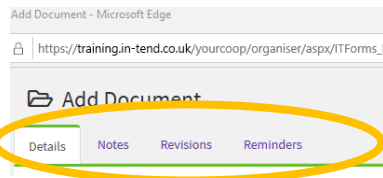
1. Has the contract spend been approved by Finance Governance? – Contracts with a lifetime value over £25k should be approved by Finance Governance. You should select the most appropriate answer here.
 - 1.1 Please insert the Capex Project Reference if applicable (usually made up of 3 letters and 6 digits). Please leave blank if this is not a capital spend
2. Has the contract been reviewed by Legal? - You should select the most appropriate answer here.
3. Has the contract been signed and dated by both parties? – You should select the most appropriate answer here. Where you do not have a copy of the contract, you should select 'No – and there is no copy of the contract'.
4. Does this contract involve the sharing or processing of any personal data? – This relates to GDPR provisions. You should select the most appropriate answer here.
5. Does the contract refer to warranties, indemnities or SLAs? – You can select one or more answers here.
6. Is outsourcing involved where staff transfers (TUPE) may occur? - You should select the most appropriate answer here. Please seek advice from HR if you are uncertain.
7. Has the supplier signed our Ethical Code of Conduct? - You should select the most appropriate answer here. If you select 'Yes', you will need to upload a copy later on in the process.
8. What is the notice period required to terminate the contract? - Please ensure you read the contract detail carefully to understand when the notice will be effective and by what method.
9. If your contract has an end date what date do you need to serve notice by? - Please ensure you read the contract detail carefully to understand when the notice will be effective and by what method. If this is not applicable then please leave the box unticked.
10. Is this contract relating to Goods For Resale (GFR) or Goods Not For Resale (GNFR)? – Please select which applies.

Once completed, please click **Next** or click on the next tab at the top of the window.

Customers - This tab is only relevant if you selected that other departments require access to your contract. If they do not, please leave this blank. Once completed, please click **Next** or click on the next tab at the top of the window.

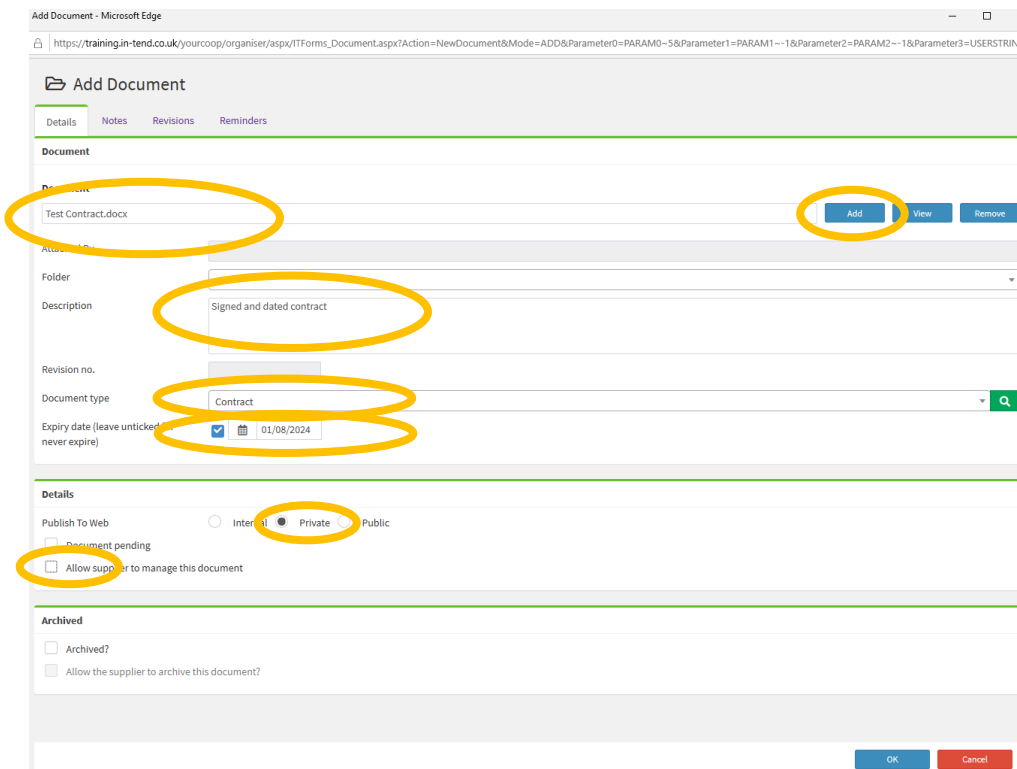
Documents – This is where you can add a copy of the contract and any associated documents to the contract record. For guidance on what should be uploaded in this section, click [here](#).

First you should click **Add Document** on the right-hand side. This will bring up a pop-up window where you will need to fill in multiple tabs:

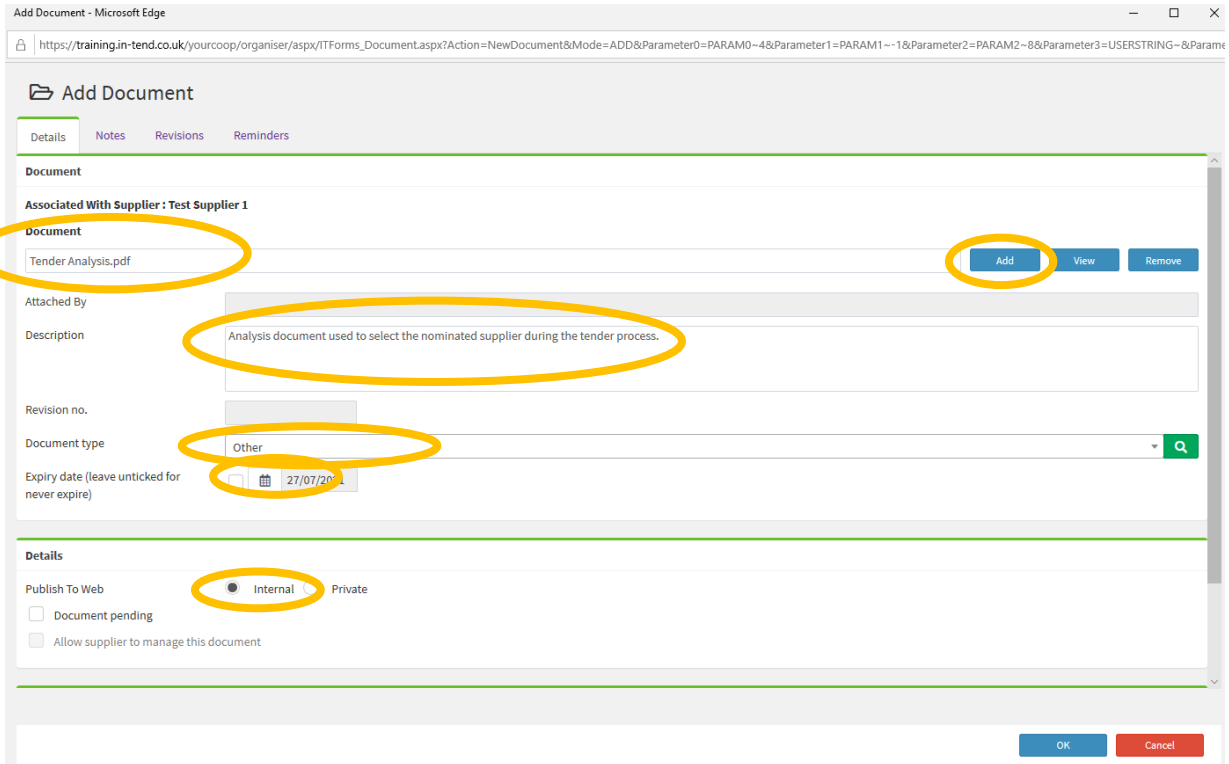


You will need to upload the file first by clicking **Add** on the first tab and follow the steps. You will then need to insert a description, select the type of document and an expiry date (for the contract, this should match what you have already inserted in the Timescales tab). You can then choose whether the document should be made visible to the supplier:

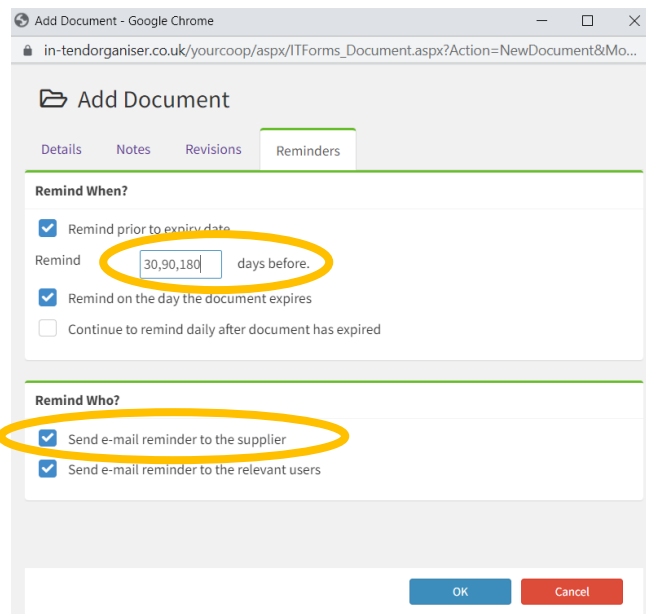
Documents you would like the supplier to have access to – for example, a copy of the contract. To do this you need to change the document details so that these are **Private** (DO NOT use the Public option) and ensure that you untick the **allow supplier to manage this document** box. This ensures they can view and upload new documents, but not amend or replace this one. You can leave the **Expiry date** field unticked if the document doesn't expire. Once filled in this should look like the screen below:



Documents you do not wish for the supplier to have access to – for example, any tender analysis documents. Please be very careful when uploading any internal documents which may contain internal confidential information. To do this you need to change the document details so that these are **Internal**. This ensures that the document is uploaded to the record on In-Tend, but the supplier won't have visibility of this on their web portal. You can leave the **Expiry date** field unticked if the document doesn't expire. Once filled in this should look like the screen below:



You can add any notes about this document on the next tab, see any revisions on the following one, and the final one allows you to set reminders to notify you, the supplier and any associated users when the document is due to expire. You can insert multiple days in the field below by inserting the numbers with a comma in between and no spaces. If you do not wish for the supplier to receive alerts for the document then ensure the relevant box is unticked below:



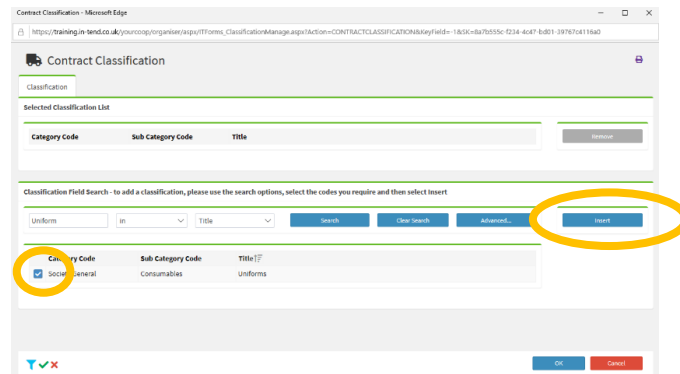
Once you have added all documents, please click **Next** or click on the next tab at the top of the window.

KPI – This tab does not need to be completed. This is functionality in the system will be considered in the future. Please click **Next** or click on the next tab at the top of the window.

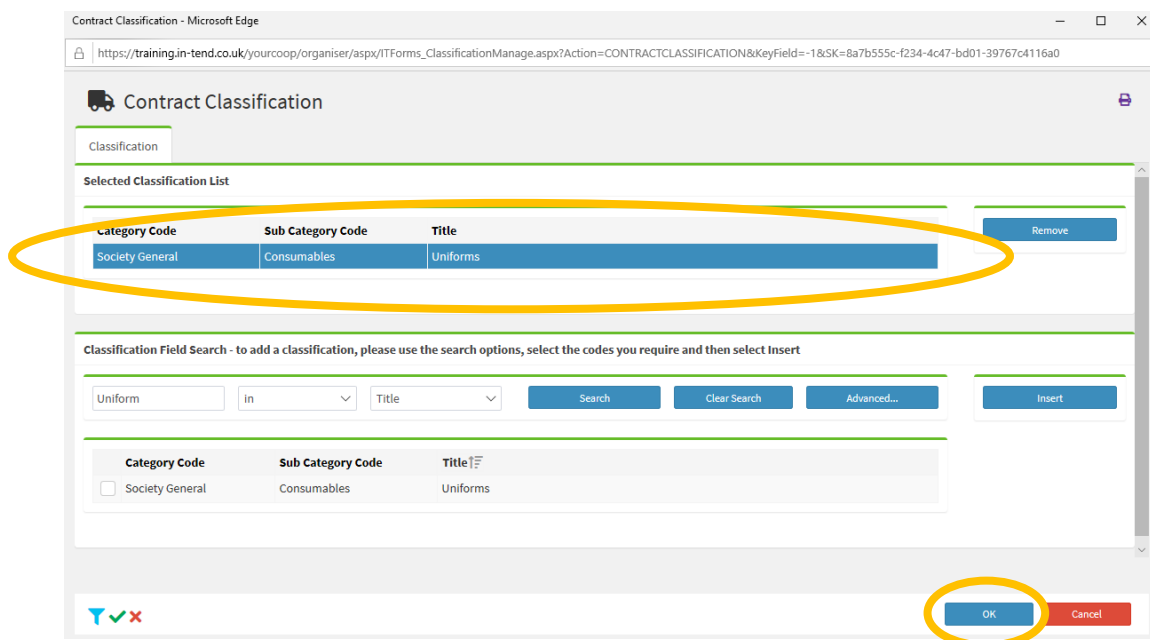
Classification - This tab allows you to add classifications to the contract. First click *Manage* on the right-hand side. This will bring up a pop-up window for you to complete.

If you insert an underscore in the *Search* box, and then click the *Search* button this will bring up a full list of classifications available in the system. Alternatively, you can use the Data Filter bar to search for a specific one by filling in the relevant boxes and clicking the *Search* button.

Once you have found the correct classification (you can add more than one as appropriate), you need to tick the box next to the name and then click *Insert* on the right-hand side, as below:



This should then appear in the top section of the pop-up window like below and you can click *OK* to proceed, as below:



This will take you back to the Classification tab where you should now see your selection inserted. Please click *Next* or click on the next tab at the top of the window.

Website – on this tab you will need to select that the supplier should confirm receipt of the contract if you are publishing the record to the supplier via the web portal.

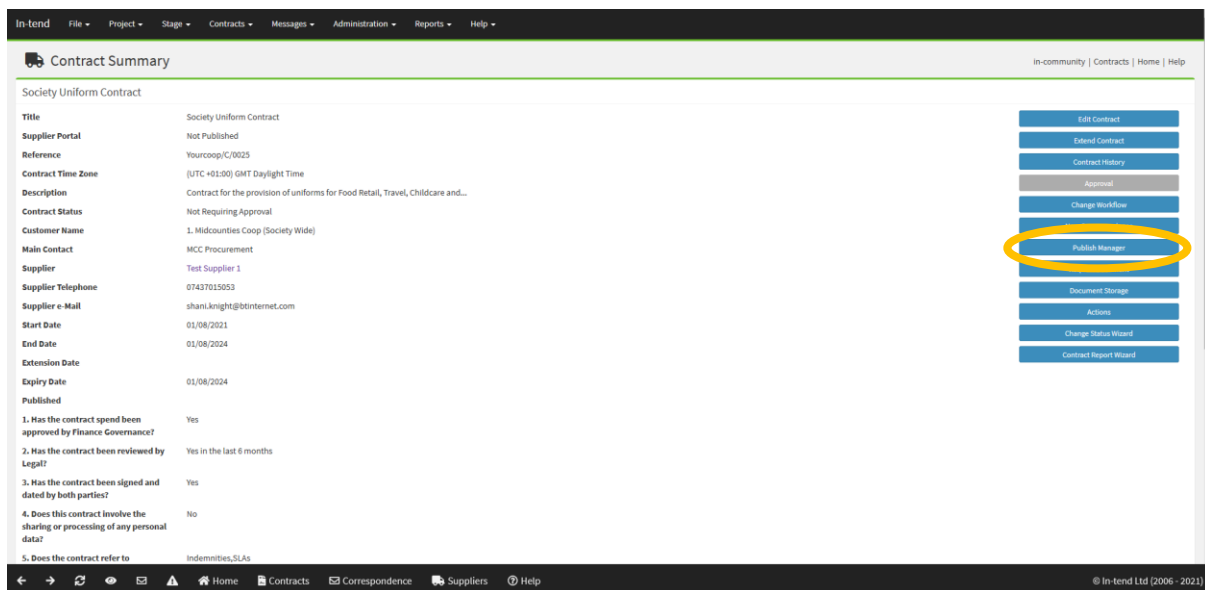
The Expression of Interest section does not need to be completed as this functionality is not currently being used.

Finally, you should also choose if you want all users to be emailed when any correspondence from the supplier is received via the web portal:

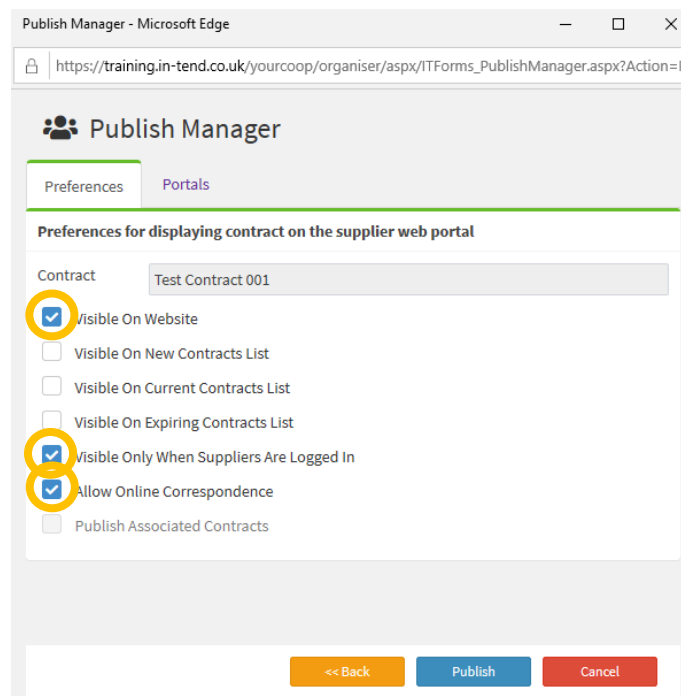
Once you have completed all of the tabs, click **Next** on the bottom right-hand corner of the pop-up window. This will then take you to a summary page of the contract record you have created. You should review this and make sure all of the information is correct. If you need to amend anything you can click **Back** on the bottom right-hand corner of the screen and navigate to the relevant tab. If you are happy with the information show, click **Finish**. You should now see the new contract in the list. If the system does not let you finish and takes you back to a particular tab, this is because there is something you have filled in incorrectly. You will need to amend the information on the tab and follow the steps again to finish.

The next step is to publish the contract to the website so that the supplier can view the record and any documentation you have allowed them access to. Note how below, there is no green tick box next to the newly added contract. This is because it has not yet been published. To do this, highlight the newly added contract in the list and click on **Contract Summary** on the right-hand side of the page:

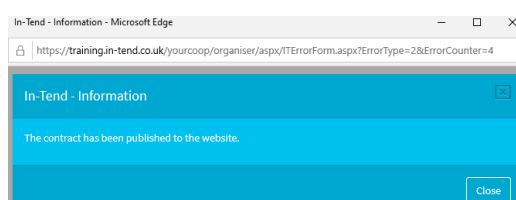
You will then need to select **Publish Manager** from the menu on the right-hand side:



The **Publish Manager** button allows you to publish the contract record, any newly added documents and any changes to the supplier's web portal. It is good practice to do this every time an amendment is made to check the settings are correct. You should select the below preferences before clicking the **Publish** button:



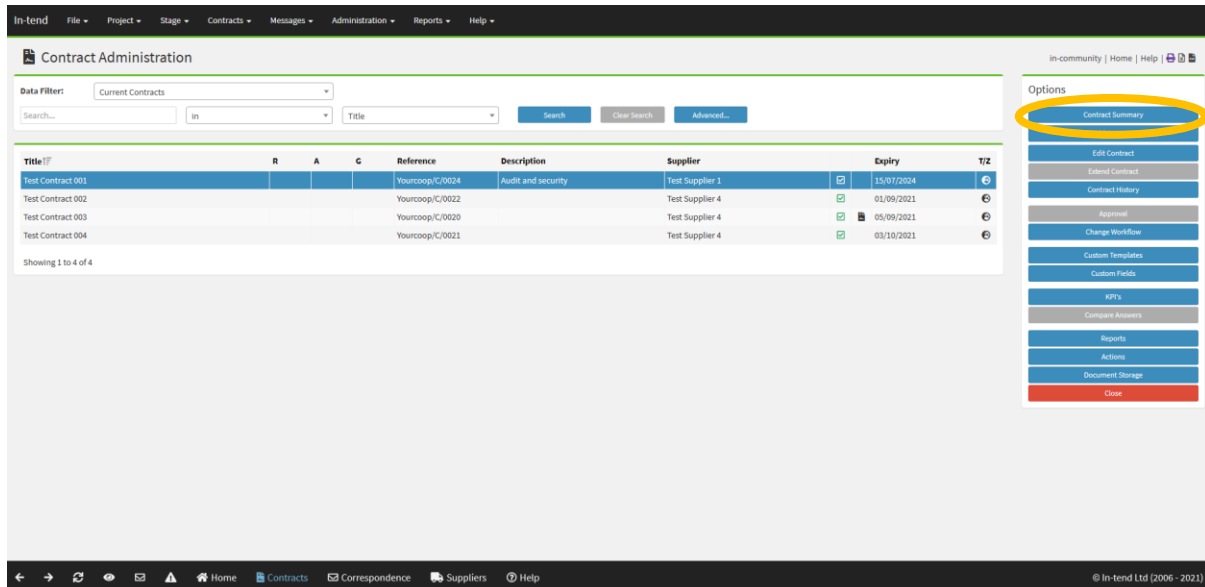
You should see the below pop-up window when this is successfully completed:



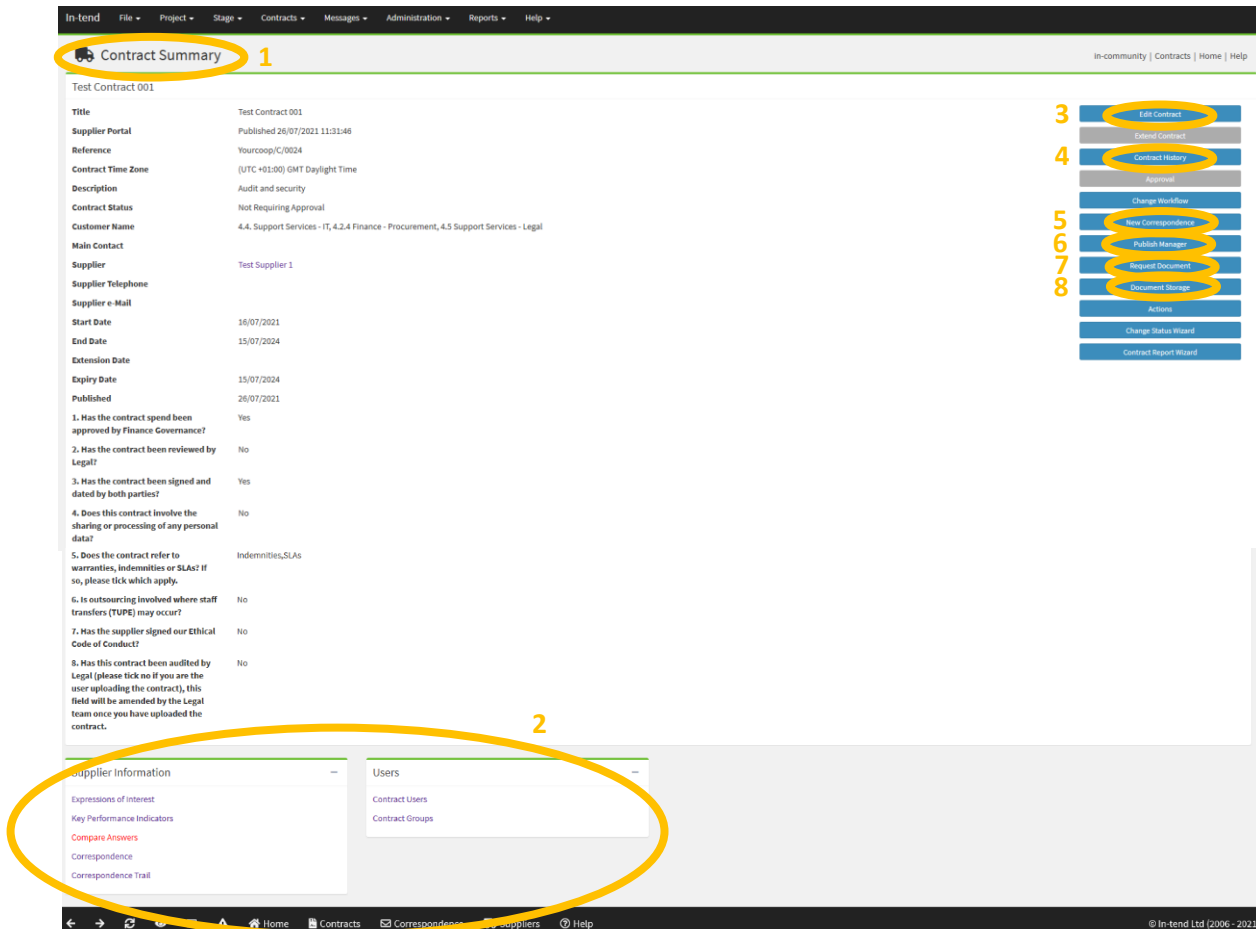
8. Amending a contract record and managing documents

You will first need to [search for the contract](#).

To view the details of a contract, highlight the relevant row and then click the **Contract Summary** button on the right-hand side:



This will then take you to the below summary screen:

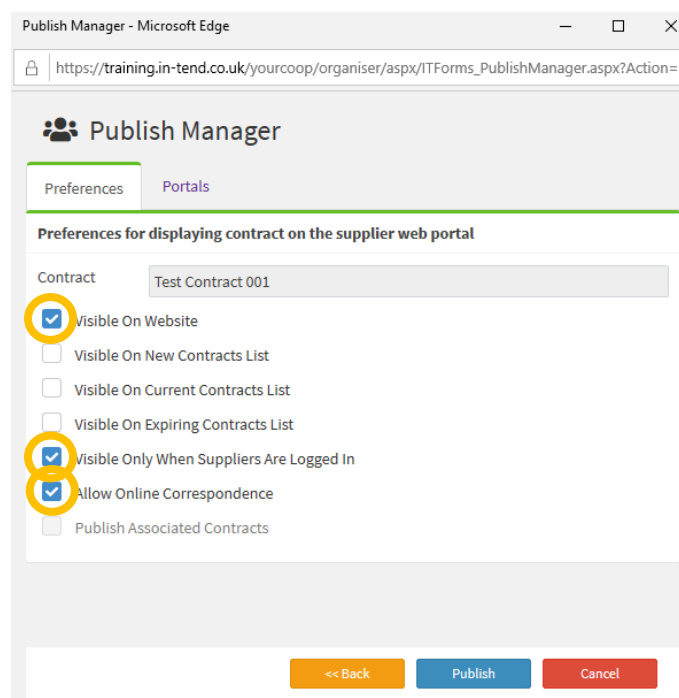


From here, you can access the key information for the contract and perform various functions:

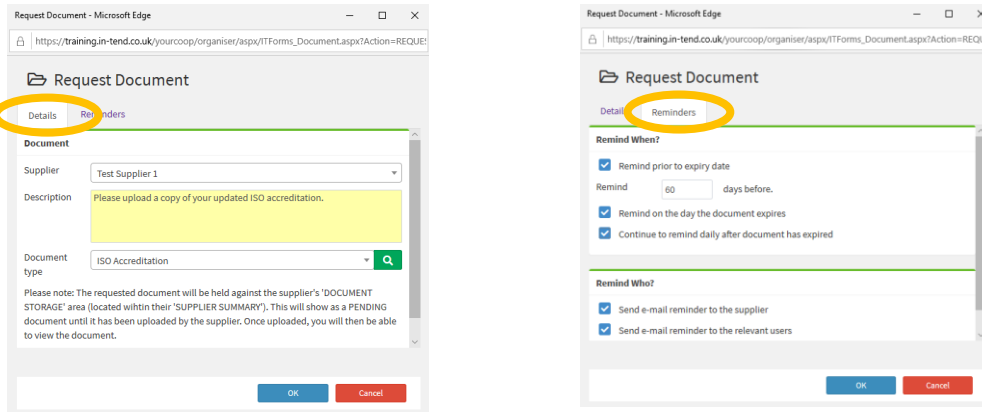
1. This section shows all of the key information about the contract that was inserted by the user. From here, you can also click into the Supplier Summary page by clicking on the supplier name hyperlink.
2. Only the correspondence functions listed here are relevant. These can be used to view any correspondence with the supplier via the web portal. The other points listed are not relevant for the way the Society is using the In-tend system at present.
3. If you click the **Edit Contract** button this will enable you to make amendments to the contract record (e.g. adding an [extension](#)). Any changes made are shown as an audit trail in the 'Snapshots' tab. If any edits are made here, you will need to click **Summary** when you are finished, then double check the information is correct before clicking **Finish**. The system will prompt you to publish any changes to the supplier's web portal, you should click **OK** here.
4. If you click the **Contract History** button this will give you an audit trail of all amendments that have been made to the contract and by who. A useful function here is that you can export this information into a printable, Excel or CSV file by clicking on the buttons at the top right-hand side of the screen:



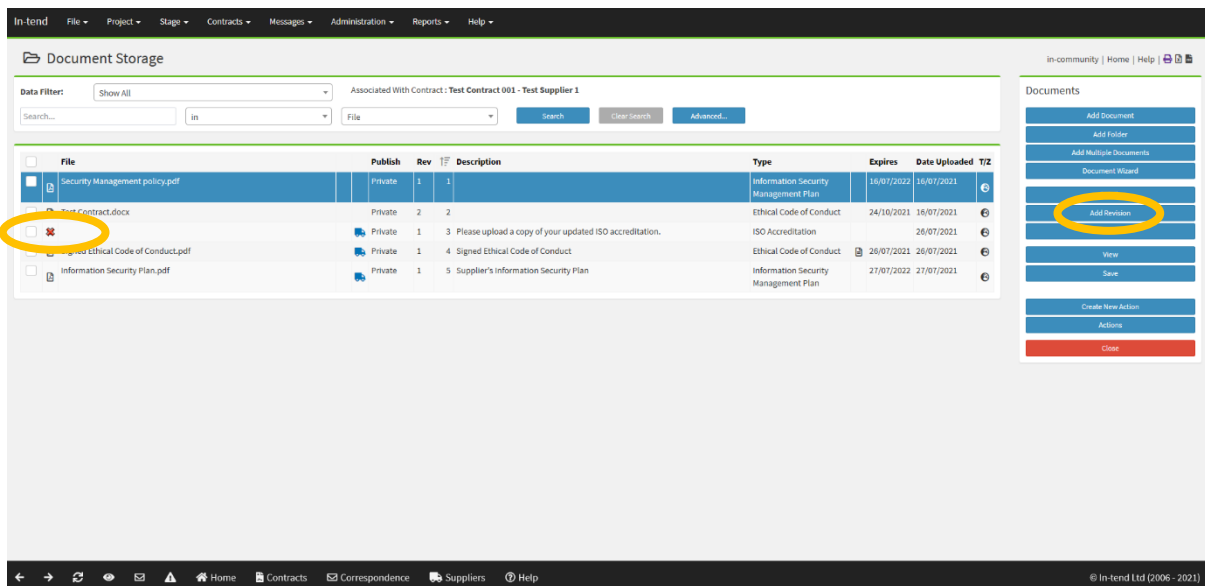
5. If you click the **New Correspondence** button, you can send correspondence to a supplier within the system and they can respond via their web portal.
6. The **Publish Manager** button allows you to publish any changes to the supplier's web portal. It is good practice to do this every time an amendment is made to check the settings are correct. You should select the below preferences before clicking the **Publish** button:



- If you click the **Request Document** button you can fill in the information in the pop-up window to send a request to the supplier for them to upload a document via the supplier web portal. Please see an example of how this can be used below, remember to fill in both the **Details** and **Reminders** tab before clicking **OK**:

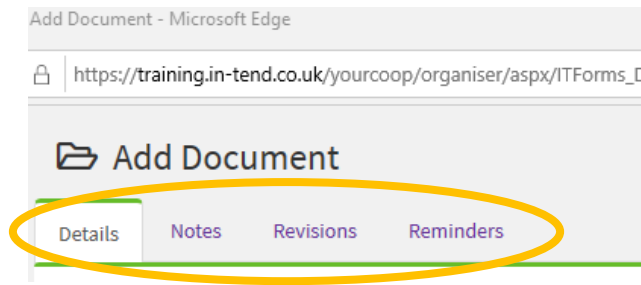


- The **Document Storage** button shows all documents which are associated with this contract, below is an example of what this looks like.



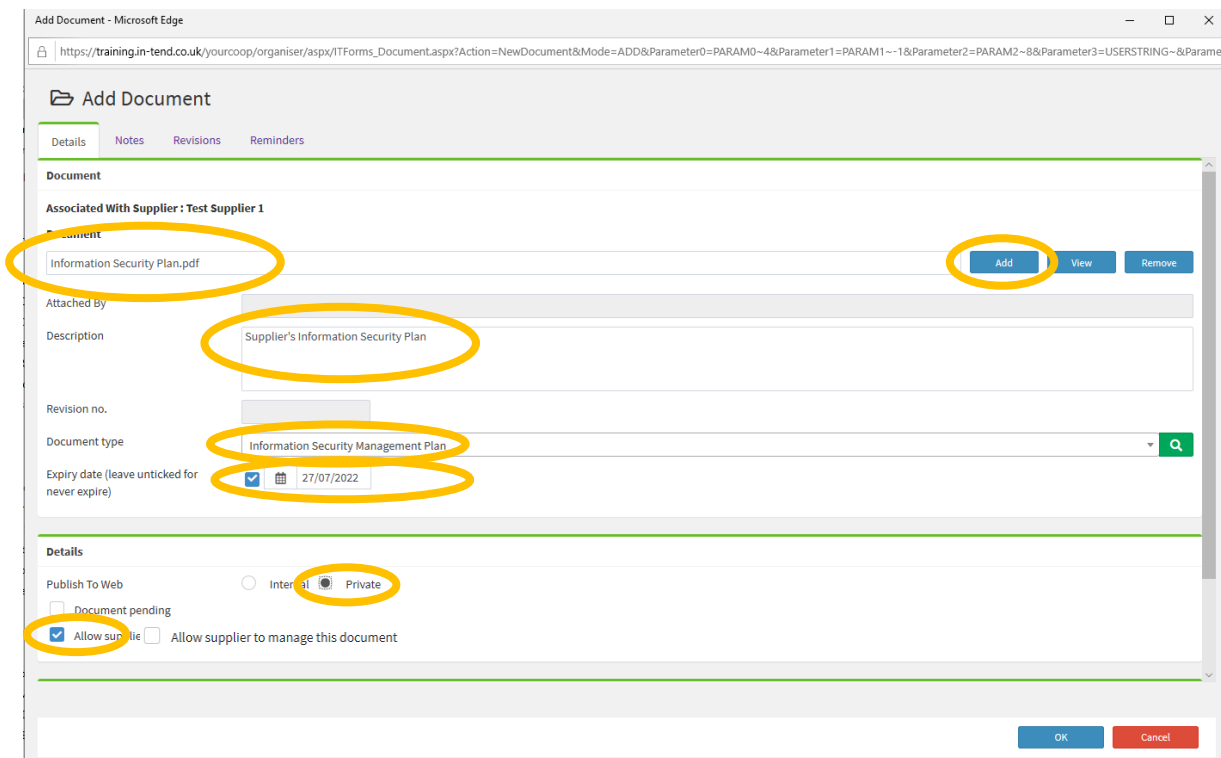
To **view** the documents, simply highlight the row and double click, then the document will appear in a new window. You'll see above that the ISO accreditation request we uploaded in the last step does not yet have a file uploaded because there is an **X** listed against it. This will change to a document symbol when the supplier uploads this via their web portal. If at any point you would like to amend a document in this section, highlight this in the list and then click **Details** or please use the **Add Revision** button, instead of removing the document so that we can maintain an audit trail.

You can also use this section to **add** any new documents to the contract record. You can do this by clicking **Add Document** on the right-hand side. This will bring up a pop-up window where you will need to fill in multiple tabs:

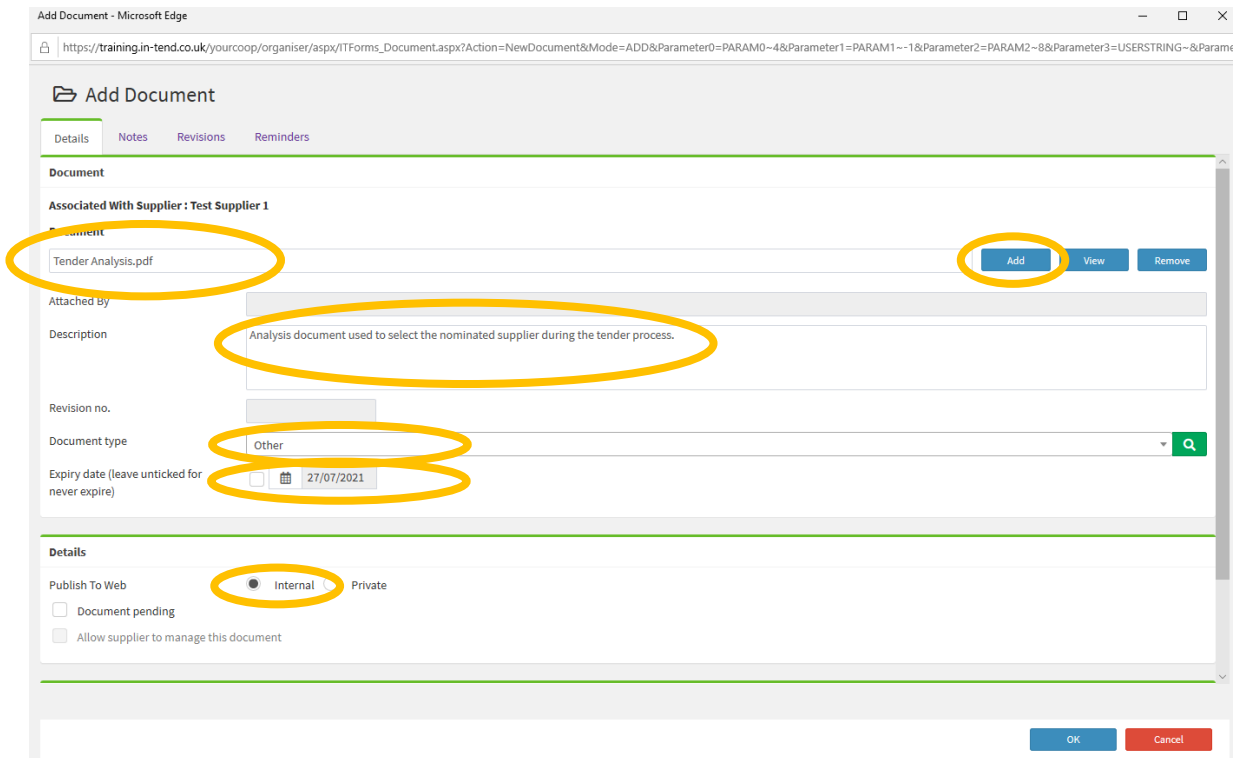


You will need to upload the file first by clicking **Add** on the first tab and follow the steps. You will then need to insert a description, select the type of document and an expiry date. You can choose whether the document should be made visible to the supplier:

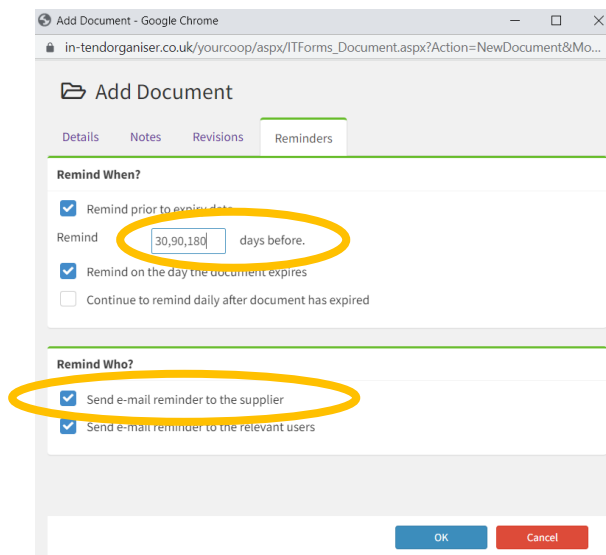
Documents you would like the supplier to have access to – for example, the supplier’s Information Security Plan. To do this you need to change the document details so that these are **Private** (DO NOT use the Public option) and ensure that you untick the ‘allow supplier to manage this document box’. This ensures they can view and upload new documents, but not amend or replace this one. You can leave the **Expiry date** field unticked if the document doesn’t expire. Once filled in this should look like the screen below:



Documents you do not wish for the supplier to have access to – for example, any tender analysis documents. Please be very careful when uploading any internal documents which may contain internal confidential information. To do this you need to change the document details so that these are **Internal**. This ensures that the document is uploaded to the record on In-tend, but the supplier won’t have visibility of this on their web portal. You can leave the **Expiry date** field unticked if the document doesn’t expire. Once filled in this should look like the screen below:



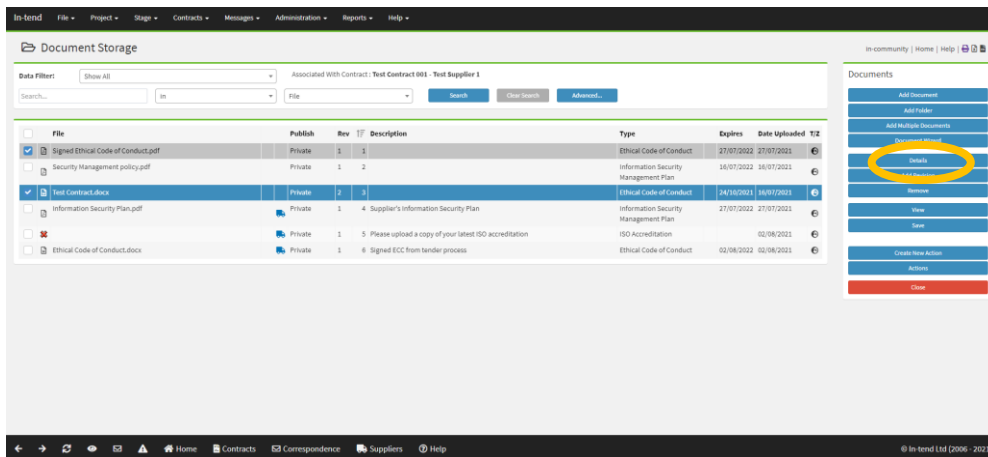
You can add any notes about this document on the next tab, see any revisions on the following one, and the final one allows you to set reminders to notify you, the supplier and any associated users when the document is due to expire. You can insert multiple days in the field below by inserting the numbers with a comma in between and no spaces. If you do not wish for the supplier to receive alerts for the document then ensure the relevant box is unticked below:



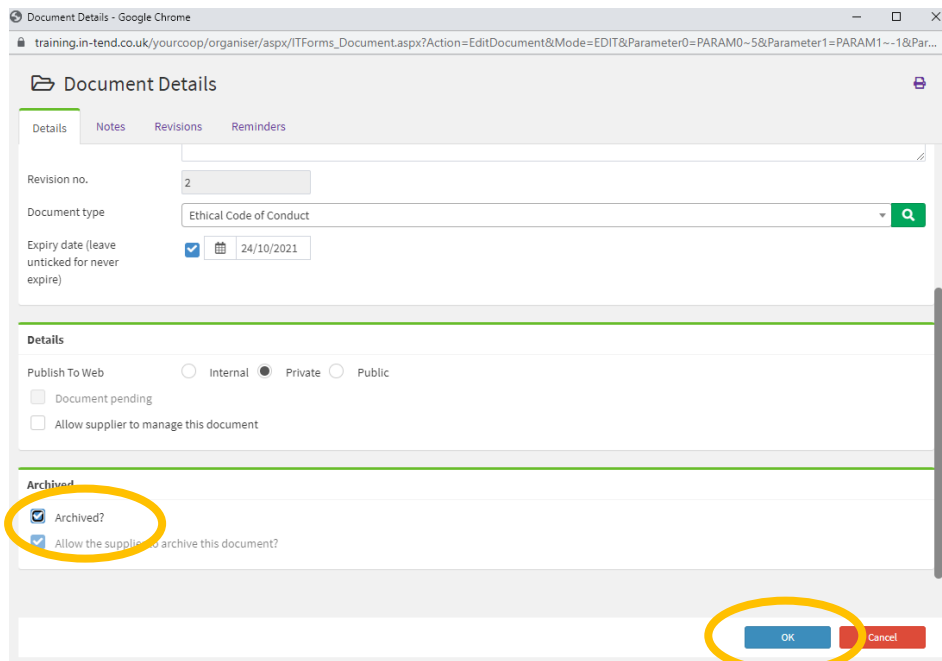
Once you have completed all of the tabs you can click **OK** and the new document will then appear in the Document Storage list. After you have uploaded a new document, it's good practice to follow the [steps to publish](#) this again in the **Publish Manager** section to ensure that it is visible on the supplier's web portal if you have allowed them access to the document.

You can **edit** documents by highlighting it in the list and then clicking *Details* from the menu on the right-hand side to bring up the pop up window where you can make any changes.

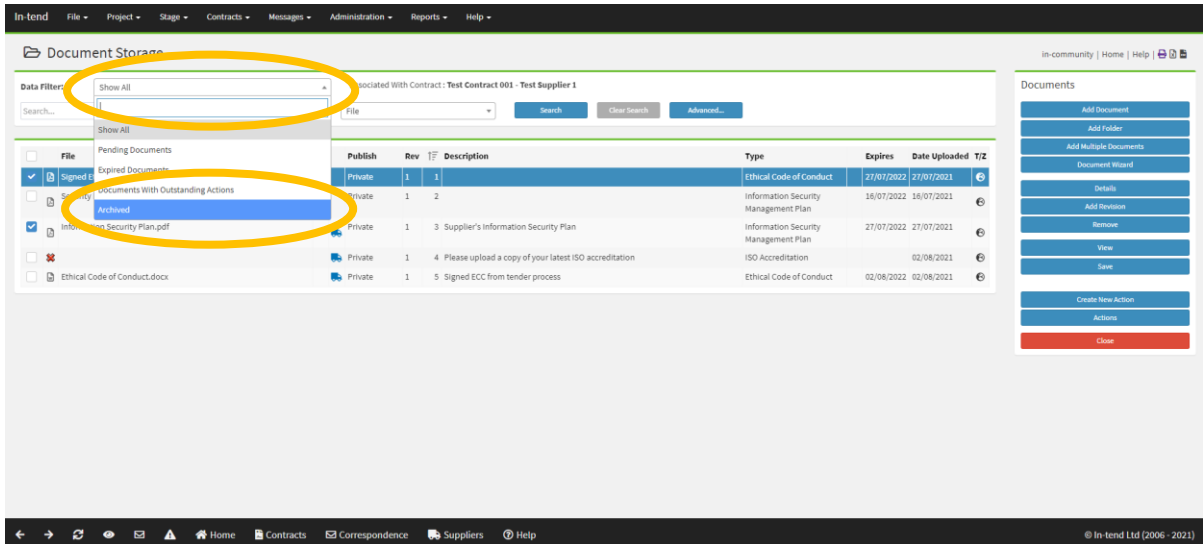
You can also use the Document Storage section to **archive** any documents (for example if the old contract has expired and you have signed a new one, or the supplier has sent you an updated version of their accreditation). You can do this by highlighting the relevant document in the list and then *Details* on the right-hand side



This will bring up a pop-up window with the details of the document. You need to select *Archived* on the first tab and then click *OK*:



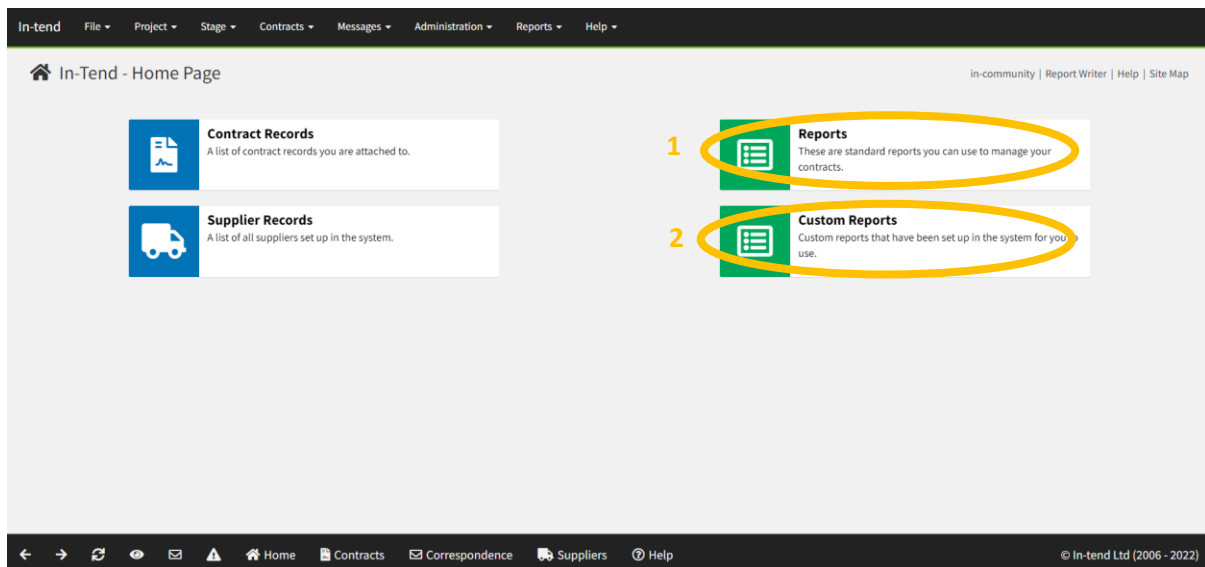
This will then remove the document from the list. You can see all archived documents in the Document Storage area by changing the data filter to 'Archived':



To close the Document Storage area you can click *Close* on the menu on the right hand side and this will take you back to the Summary page.

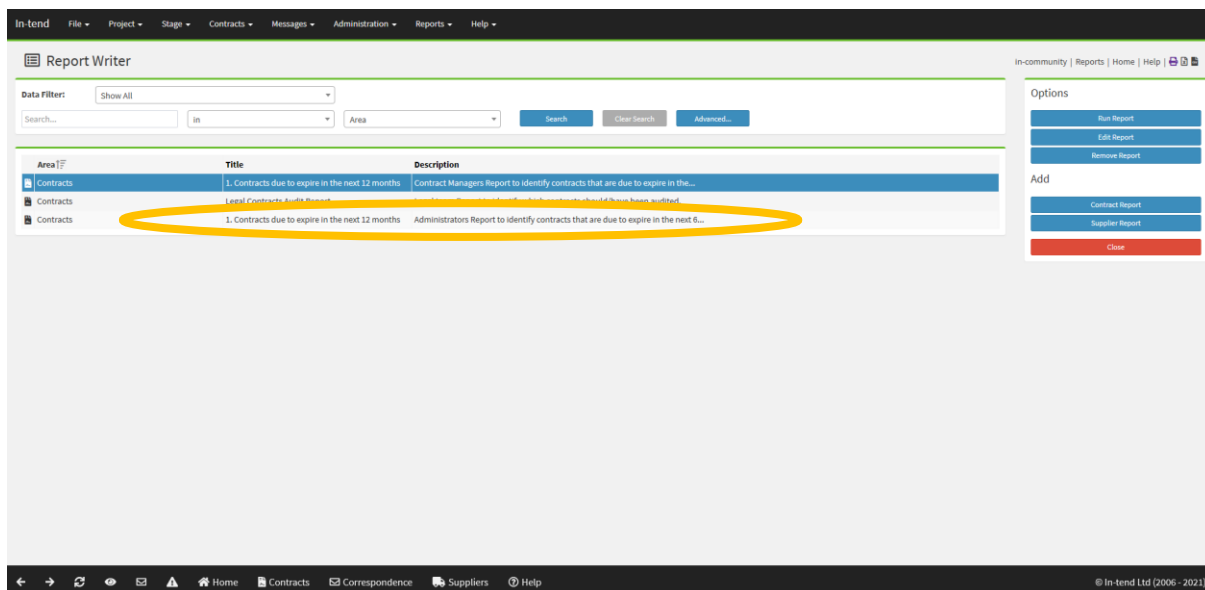
9. How to pull reports

Reports can be accessed from the homepage:



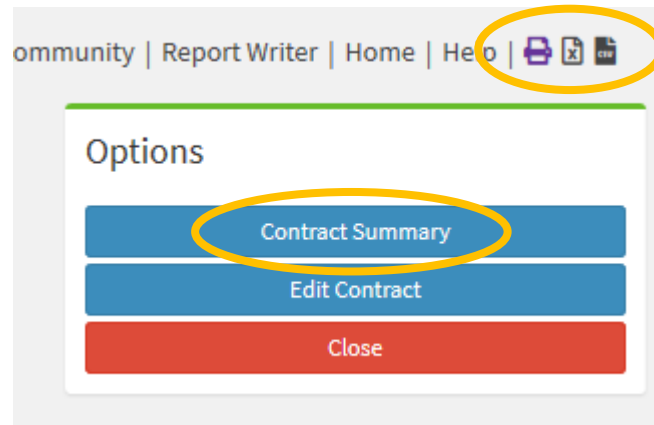
1. This **Reports** button will take you to a list of standard reports which are available within the In-tend system.
2. This **Custom Reports** button is where you can access useful reports that have been set up for you to use. This includes contracts which are due to expire in the next 12 months

Custom Reports are what you will use most frequently. You will receive the 'Contracts due to expire' report monthly via email. However, you can also run reports yourself at any point. To do this, click on **Custom Reports**, this will bring you to the screen below. The reports which are listed as 'Contract Managers Reports' in the description box are those which you can use:



To view the report, highlight it and then click **Run Report** on the right-hand side. This will bring you to a page which shows the report on screen.

You can use the functions on the right-hand side to select a contract and navigate to the [Contract Summary](#) where you can perform various actions. Alternatively you can export the report into a printable, Excel or CSV file by clicking on the buttons at the top right-hand side of the screen:



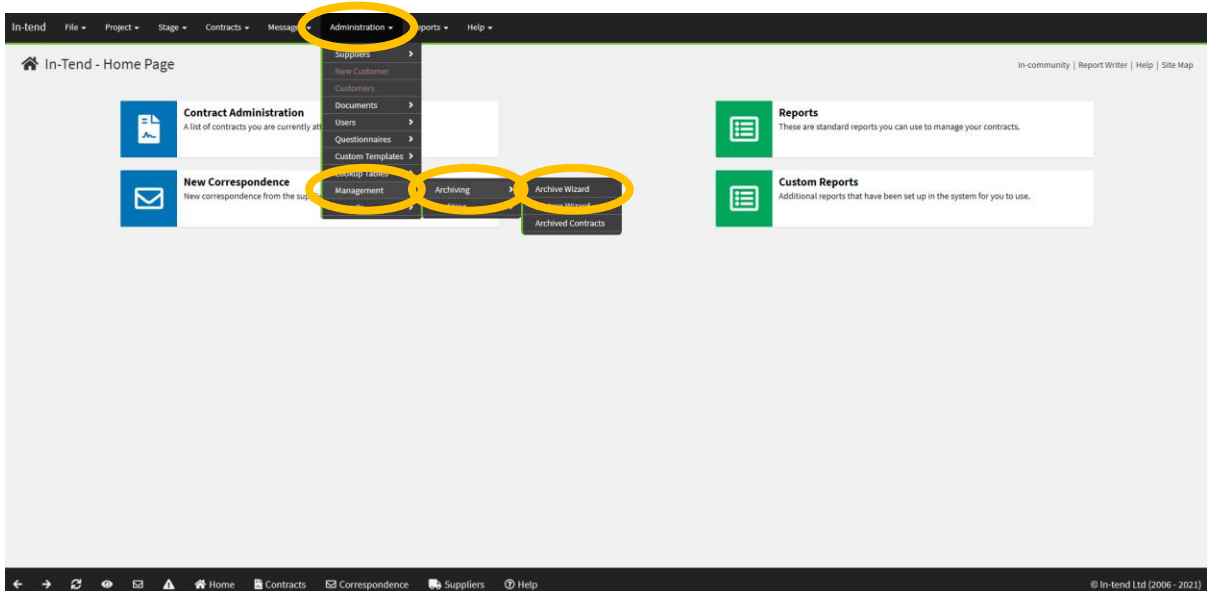
If you feel you would benefit from other reports but cannot see these listed, please email In-tend@midcounties.coop

10. How to archive a contract record

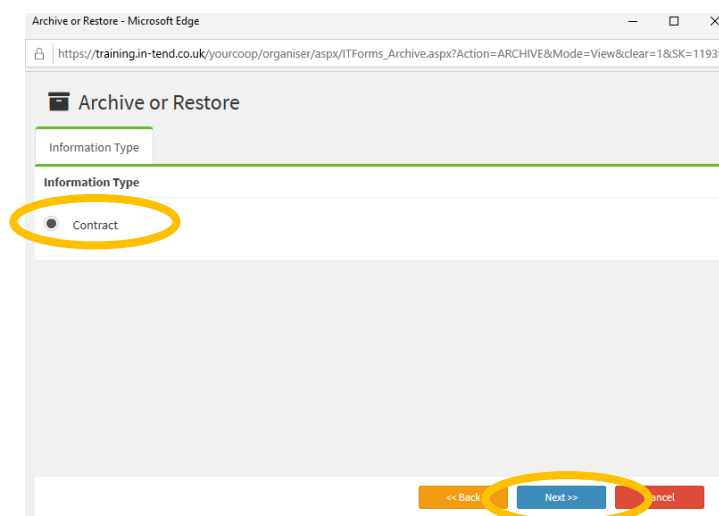
You do not need to archive the contract record if you have signed a new one with the same supplier and are simply extending the contract. In this instance you need to just add a contract extension to the record, amend any necessary information, upload a copy of the new signed contract and archive the old document. You can see the guidance on how to do this [here](#). However, if any contract terms have changed then it is best to archive the old record and start a new one entirely.

Once a contract has ended entirely and is no longer valid it needs to be archived. Contracts should never be removed from the In-tend system, only archived.

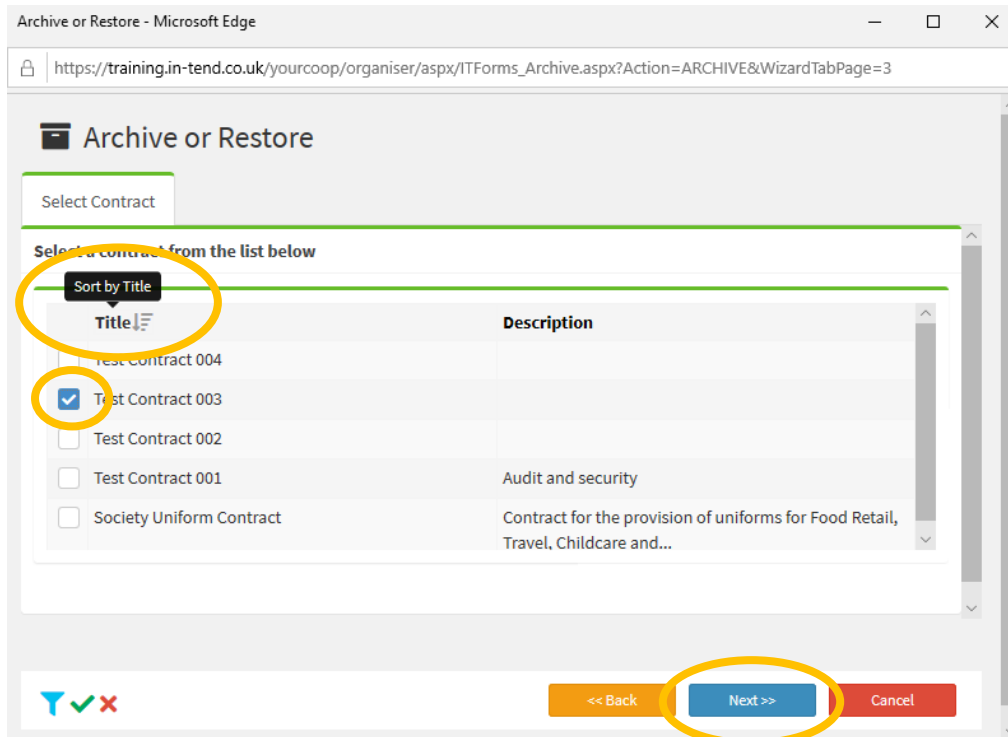
To do this, you will need to navigate to the Archive Wizard by selecting **Administration > Management > Archiving > Archive Wizard** from the top menu bar as shown below:



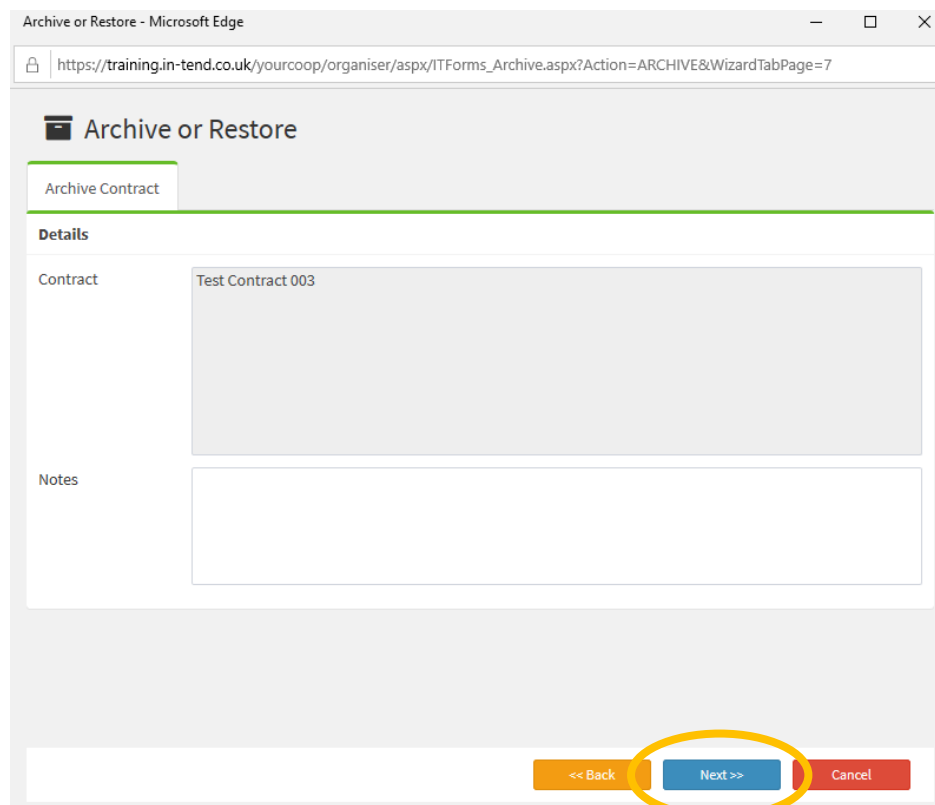
This will bring up the below pop-up window where you will need to make sure 'Contract' is selected, then click **Next**:



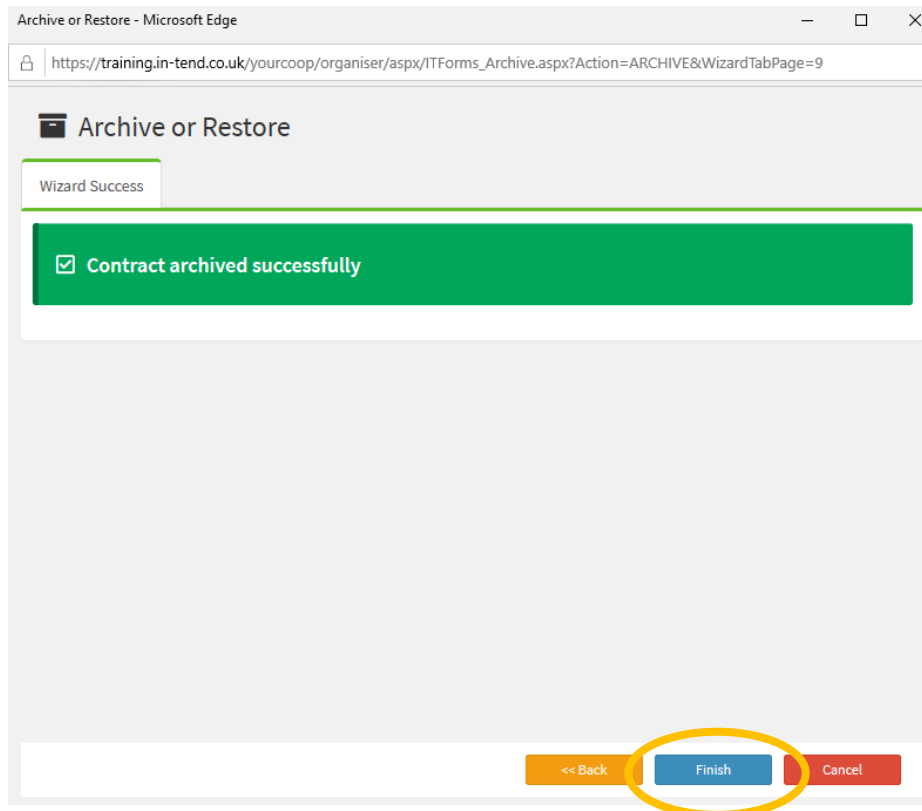
You will need to scroll through the list of contracts to find the relevant one or you can use Ctrl+f to search. Please take care to select the correct contract. You can also sort the contract names alphabetically to help you find it by clicking 'Title'. Once you have found the contract, select this by ticking the box next to the name and then click **Next**:



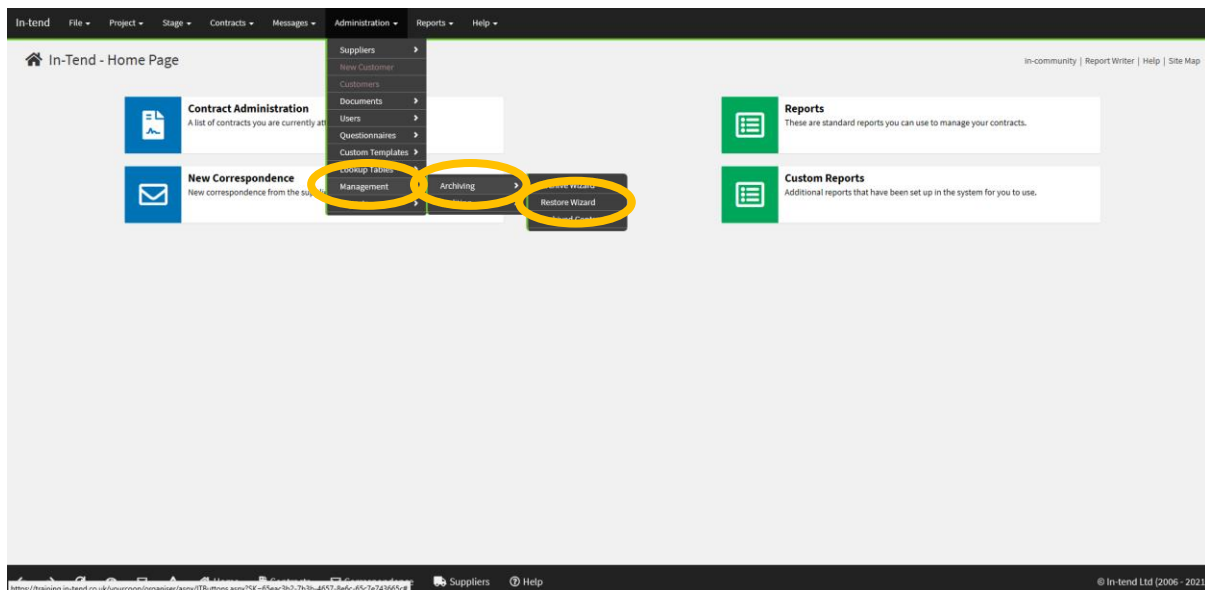
You can then make notes about the reason for archiving below, then click **Next**:



You will then see the below appear when the contract has been successfully archived. To finish, click *Finish*:



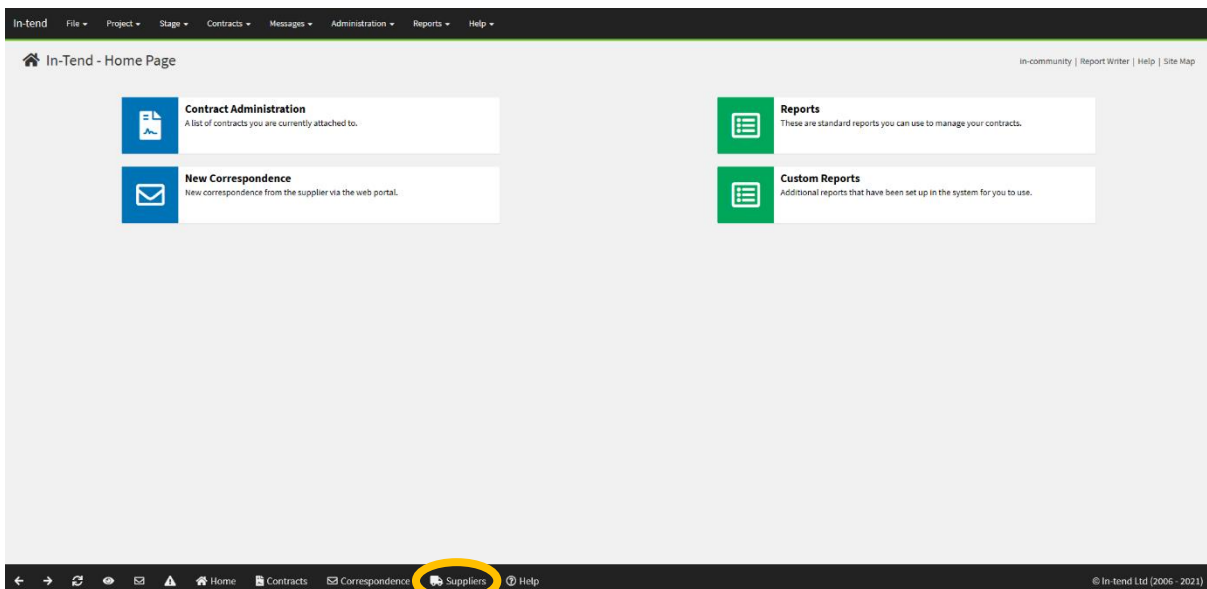
The contract should no longer appear in your list. If you wish to view the list of contracts you have archived you can navigate to this list via the same menu. You can also restore any contracts by selecting *Administration > Management > Archiving > Restore Wizard* from the top menu bar as shown below, and follow the same process as above:



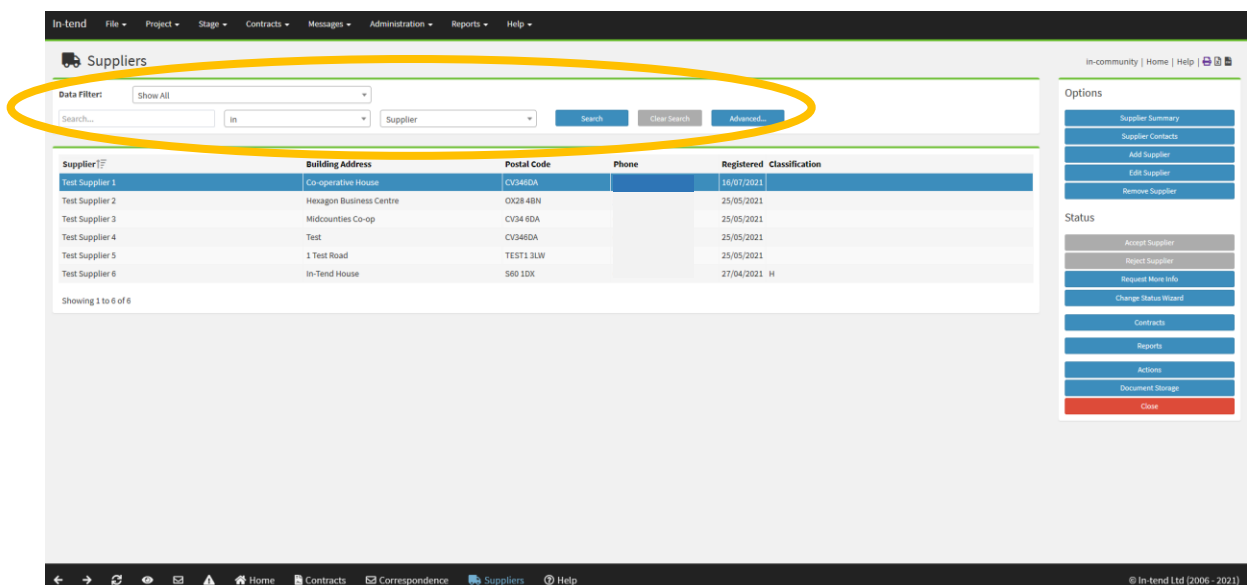
11. How to archive a supplier record

Archiving a supplier should take place once the contract and relationship has ended and they are no longer a supplier of the Society's. It is important to check the supplier does not have any current contracts listed against them before you archive their record (remember other areas in the Society may still have a contract with the supplier even if you no longer do), you can [click here](#) to see the guidance on where to find this information. Suppliers should never be removed from the In-tend system, only archived.

To do this you need to first search for a supplier by clicking the **Supplier** button on the banner at the bottom of your screen:

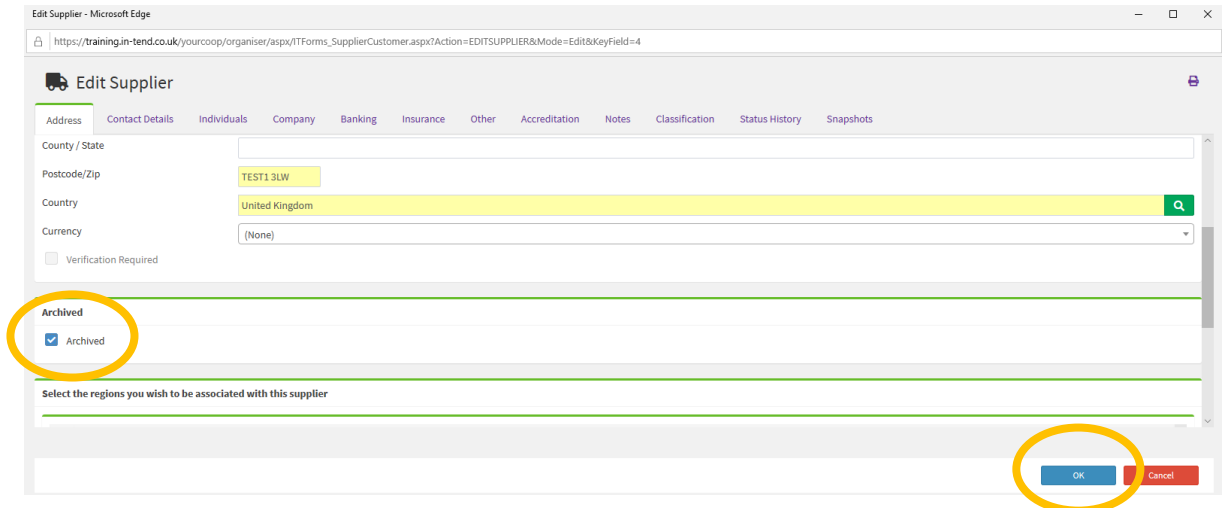


This will bring up the full list of suppliers in the system. You can use the Data Filter bar highlighted below to search for a specific supplier you are looking for by filling in the relevant boxes and clicking the **Search** button:



A useful tip if you want to search for all suppliers, is to insert an underscore in the *Search* box, and then click the *Search* button.

Once you have found the correct supplier, click *Edit Supplier* on the right hand menu. This will bring up the pop-up window with the tabs that you will now be familiar with from adding the supplier to the system. You need to scroll half way down the first tab and select the 'Archived' box as below and then click *OK*:



This should take you back to the list of suppliers, where you will no longer see the supplier listed. At this point, the supplier will automatically lose access to the web portal.

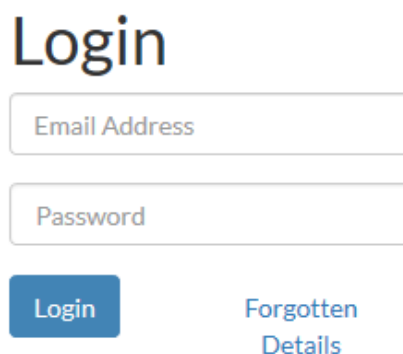
If you require the supplier re-instating, please email In-tend@midcounties.coop

12. How suppliers use the web portal

The user who sets up the supplier on In-tend as part of the 'adding a supplier' process will need to issue the log in details to their supplier contact, you can revisit the steps on how to do this [here](#). Users can refer to the **Supplier In-Tend Communications Template** for guidance on this and should also issue the **Supplier In-Tend User Guide** to the supplier.

The supplier will need to change their password when they first sign in. Moving forward, the supplier can use the 'forgotten password' function on the web portal or you can reset their password on the 'Individuals' tab on the Supplier record.

When the supplier logs into the system they will need to insert their username and password to log in on the right-hand side of the page.



Once the supplier is logged in they may see some information regarding tendering opportunities on the web portal. These elements should be ignored at present. Unfortunately, we don't have the ability to hide them. The In-tend system has extensive functionality for tendering, but we are not using this at this moment in time. We are focussing first on uploading our contracts for visibility and enabling our colleagues to use the system confidently. The other elements of the system will be considered in the future.

The main functions the supplier can use are highlighted below, which are at the top of the page when the supplier logs in:



Messages – this is where they can view, reply and send any correspondence to you via the In-tend system. The system will send you a notification via email when a correspondence is sent.

Contracts – when the supplier first logs into the system, it will ask them to confirm receipt of the contract. Here, the supplier can see the contract record and documents you have given

them access to. They can navigate through the tabs at the top of the page. The below shows the *Contract* tab, where they can view the high-level information you have inserted into the contract record:

Contract | Documents | Correspondence

Test Contract 002

Please note: All date & time fields are being displayed using (UTC +01:00) GMT Daylight Time

Title: Test Contract 002

Reference: Yourcoop/C/0022

Contract Value: 1000000

Currency: Pound Sterling (GBP)

Supplier: Test Supplier 4

Customer: 1. Midcounties Coop (Society Wide), 5.1 Coop Childcare (ALL), 5.2 Coop Food (ALL), 5.3 Coop Funeral (ALL), 5.6 Coop Travel (ALL), 4.3 Support Services - HR (ALL), 4.3.3 HR - Resourcing, 4.3.1 HR - Colleague Relations, 4.3.2 HR - Learning and Development, 5.2.1 Coop Food - Commercial Partnerships, 5.2.4 Coop Food - Store Operations, 5.2.2 Coop Food - GFR, 5.1.1 Coop Childcare - GFR, 5.3.1 Coop Funeral - GFR, 5.6.1 Coop Travel - GFR, 5.7 Coop Utilities (ALL), 5.7.1 Coop Utilities - GFR, 5.5.1 Coop Rewards - GFR, 4.8 Support Services - Property (ALL), 4.8.6 Property - Property Services, 4.8.5 Property - Property Management, 4. Support Services (ALL), 5.4 Coop Pharmacy (ALL), 5.4.1 Coop Pharmacy - GFR, 5.5 Coop Rewards (ALL), 5.1.2 Coop Childcare - GNFR, 5.2.3 Coop Food - GNFR, 5.3.2 Coop Funeral - GNFR, 4.8.4 Property - New Store Development, 5.4.2 Coop Pharmacy - GNFR, 5.5.2 - Coop Rewards - GNFR, 5.6.2 Coop Travel - GNFR, 5.7.2 Coop Utilities - GNFR, 5. Trading Groups (ALL), 4.8.1 Property - Health and Safety, 4.8.2 Property - Insurance, 4.5 Support Services - Legal, 4.8.3 Property - Loss Prevention, 4.2 Support Services - Finance (ALL), 4.2.4 Finance - Procurement, 4.2.5 Finance - Tax, 4.2.2 Finance - Banking, 4.2.1 Finance - Audit, 4.2.3 Finance - Bonds and Shares, 4.4. Support Services - IT, 4.6 Support Services - Marketing, 4.7 Support Services - Membership, 4.9 Support Services - Secretariat, 4.8.7 Property - Utilities, 3. Environmental Services (Society Wide), 2. Consumables (Society Wide), 4.1 Support Services - Colleague Engagement

Main Contact: Shani Knight-Cross

Expiry Date: 01 September 2021

Category: Non External Journal

Type: Unspecified

Contract Start Date: 01 July 2021

Contract End Date: 01 September 2021

The *Documents* tab is where they can view, download, access the history of and upload any new documents to the contract record.

Home | Buyers Profiles | Messages | Tenders | Contracts | Company Details | Help | Logout

Contract Management

Contract | **Documents** | Correspondence

Document Title	Area	Status	Expires	Date Added	Type	Options
Test Contract.docx	Private	Document available	Never Expires	01/Jul/2021	General	View Download History

Upload Company Document

Type:

Expiry Date:

File:

[Upload Document](#)

The *Correspondence* tab allows the supplier to send correspondence to you via the web portal, in the same way as the Messages section on the main banner at the top of the page.

Company Details - here, the supplier can update their details, and this will feed through to In-tend. This is also where the supplier can change their own password. To do this they will need to click on *Contact Details* and then select the contact from the dropdown list to change their password in the highlighted field below, and then click *Save Contact*:

The screenshot shows the 'Company Details' page with the 'Contact Details' tab selected. The 'Contact' dropdown menu is highlighted with a yellow circle. The 'Password' and 'Confirm Password' fields are also highlighted with yellow circles. The 'Save Contact' button is highlighted with a yellow circle. The form includes fields for Title, First Name, Surname, Telephone, Fax, e-Mail, Confirm Email, Mobile, Job Title, Department, and Office. A checkbox for 'Copy all e-Mails to this user' is checked, and a checkbox for 'Don't send contract correspondence' is unchecked. A key indicates that fields with an asterisk are mandatory.

Remember, once a supplier has been archived on In-tend by a user (you can revisit the guidance [here](#)) they will automatically lose access to the web portal.