

User manual

"I am very interested in uncovering the first opportunity through Contracts Advance as well as working with you to uncover opportunities that are yet to be discovered."

SW, Head of UK Business Development, Cegla

"Contracts Advance has saved our team hours of time and is something we would recommend to other organisations who frequently bid for new services."

B-LM, Business Development & Marketing Manager, The Practice Group

"Thanks a ton for this fantastic piece of intelligence. This is really useful and saved me the trouble of trying to find this out myself. Really appreciate this, thanks again."

JN, Bid Manager, Tata Consultancy Services

We are proud to support our corporate, third sector and SME clients who include:



Michael Page



Menu Functionality

Advance Dashboard

When you log in to your account, you will automatically default to your **Advance Dashboard**. When setting up your account, this can be set to display advance contracts at either 6 months + (from contract end) or 12 months +.

Current Dashboard

To display all current tenders fitting your profile, click on **Current**.

You will also receive daily notification of your current opportunities, Advanced Information Notices (AINs) and Prior Information Notices (PINs) and Contract Notices via a daily email alert to the nominated recipient/s.

These opportunities extend from today's date back 3 months.

Archive Dashboard

This will access:

advance contracts below your time period setting (i.e. either 1 – 5 months or 1 – 11 months)

or

current contracts published 4 - 6 months ago

NB: To access you advanced archive, you must navigate to your **Archive** from your **Current** dashboard;
to access you current archive, you must navigate to your **Archive** from your **Current** dashboard.

Your Favourites

As you qualify those opportunities within your **Advance** and **Current** dashboards which fit your qualification criteria, you can favourite them by ticking the **Favourites** box.

Subsequently navigating to your **Favourites** will return you these qualified opportunities, both current and advanced.

NB: To access you advanced **Favourites**, you must navigate to your **Favourites** from your **Advanced** dashboard;
to access you current **Favourites**, you must navigate to your **Favourites** from your **Current** dashboard.

Dashboard Functionality

Source

Indicates a headline value to the contract, i.e. whether it is above or below the OJEU threshold. This can be filtered to show all Above OJEU or all Below OJEU by clicking on Source.

Agency / Contract Name

The issuing Agency and Contract Name as it appears on the Contract Notice.

Date Published / Start Date / End Date / Months to go (Advance dashboard only)

Date the contract was published, date it started, date it will end and how many months remain to contract end

Details

Takes you to a contract summary; it will provide a short description, relevant procurement contact details, value (if known (Current)) and a link to the originally published contract for full contract details.

The summary provides you with 'at-a-glance' information required to qualify in / out.

The summary page can be printed or sent directly to a colleague by email, using the icons appearing at the top right of the page. You can access the full contract notice via the link at the bottom of the page.

To return to your dashboard, click your return button or back button on the bottom of the details page.

Comments Box

This allows you to update activity associated with any relevant contract in both the current and advanced dashboards. Notes can be saved, edited and deleted.

When saved they will automatically populate your favourites folder with summarised contract information and comments which can be accessed in aggregated form through the export function.

Export

This enables you to export all items currently appearing in your **Favourites** into an excel file, from where they can be piped into your own CRM (eg Salesforce). You are most likely to utilise this function from Your Favourites dashboard, e.g. to circulate to sales teams or other relevant executives for discussion of your current targets, to either qualify further or to action via pre-bid stakeholder engagement.

Search box

The search facility will help minimise time spent filtering. Two types of searches can be performed: 'Contains' and 'Exact phrase'. If 'Contains' is selected then the search will produce results which have the key word(s) anywhere within the title or short description. 'Exact phrase' in comparison allows you to perform a compound search such as 'Medical Devices'.

Dashboard Functionality (continued)

Geographic Search

This function allows you to search on a specific area by miles radius, from a full or part postcode (e.g. BA1 or BA1 5BB), or a specific country within the UK. As default the search will be set to national, i.e. UK & NI. Should a post-code search be created and Default Setting pressed, this will reset your dashboard from that search to the default, with current email alerts being sent based on the new radius or country.

Following a postcode search, to return to the original national setting, simply go to the menu, click **Dashboard** and it will revert to your original Advance/Current Dashboard.

Our system also covers contracts above the OJEU threshold within the European Union; these can be included by selecting the Europe category and setting this as default. This only applies to the current dashboard.

From July the geographic search will also enable you to focus your search by county.

Sort Function

If you click on any of the main dashboard column headings this will sort the contracts in numerical descending order (i.e. most months to least in advanced) and alphabetically in the worded columns.

Visual Display

At the bottom left of each dashboard page it states the numbers of pages and contracts. At the bottom right of each page there is drop down menu giving you the option of contract numbers you wish to see on each page (i.e. 20, 50, 100).

Minimising the menu

To expand your dashboard to full screen click on the icon in the top left corner, above Dashboard. To return the menu click on this again.

FAQs:

Q. Can I change my profile during my subscription?

A. Your profile can be changed at any time

Q. Can I have more than one profile?

A. A single subscription allows up to three profiles, e.g. for core self-deliver activities, for partner opportunities, for specific geographical region. To discuss further profiles, please contact your Client Care Manager.

Q. Which browsers is Contracts Advance compatible with? And is it compatible with mobile devices?

A. Contracts Advance is compatible with all up to date browsers and mobile / tablet devices

Q. Can the alerts be sent to more than one person?

A. Yes. The daily email alerts can be sent to multiple email addresses but the login details remain the same.

Q. Can more than one user access our dashboards at the same time?

A. There is no limit on the number of users in the system at one time so multiple users can access the same account simultaneously.

Q. How have the categories been set?

A. Our categories have been carefully chosen based on our business development and market experience, we have aligned each CPV code with our own categories and sub-categories. Aware of the inefficiencies of the CPV code system, Contracts Advance has been designed to return the best balance between not too much white noise and not missing opportunities.

Q. As a subscriber to Contracts Advance, do I qualify for preferential rates from the suite of service offerings offered by your consultancy arm, 7House?

A. Yes, to discuss, please contact 7House Managing Director Craig Millhouse on 01225 731430.

Service:

User Licence

Each Contracts Advance licence allows three user profiles and two email alert recipients which can be set and changed throughout the lifetime of the subscription. Your Client Care Manager is always available to discuss should further profiles and / or alerts be required.

7House consultancy session

On receiving confirmation, we will schedule your knowledge transfer consultancy session, focussed on best practice qualification and pre-bid stakeholder engagement, to help introduce you to this process or refine your already existing processes.

Your profile

We recommend your initial profile is as broad as possible to ensure capture of all possible opportunities falling within your business space.

Our Client Care Manager will work with you over month one to subsequently refine this initial profile to find the optimum balance between not too much white noise and, critically, not missing opportunities.

For any further queries regarding Contracts Advance system usage, please contact:

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