

Sell2Wales
**Buyer User Guide –
Stage 2 notice**



Llywodraeth Cymru
Welsh Government

www.cymru.gov.uk

Table of Contents


What is the Stage 2 notice?	2
How to create a Stage 2 Notice	3
How to distribute a Stage 2 Notice	5
Administering a distributed Stage 2 Notice	10



What is a Stage 2 notice?

The Stage 2 notice function allows buyers to send out a short invitation to tender to a select list of suppliers, who have prequalified from the first stage of a two stage procedure, such as the OJEU restricted procedure. The tender process can be managed online with options to attach and send documents, activate online Q&A and receive completed tender submissions online using the postbox.

Buyers would use this function following a pre-qualification stage. It is used to invite shortlisted suppliers to the tendering phase and also allows for final tenders to be submitted via the postbox. This keeps the entire tendering process online to help simplify and reduce the work load for both buyers and suppliers, while maintaining fairness and integrity for all parties.

The Stage 2 notice is not published in the public domain. It is only visible within the Buyer's Stage 2 Control Panel and the interest list of those suppliers selected to tender. A Stage 2 notice is represented by the red and white symbol: 

Stage 2 Control Panel Page

Stage 2 Control Panel

The Restricted Procedure Stage 2 function allows contracting authorities to send out a short invitation to tender electronically to a select list of suppliers, prequalified under the restricted procedure for both OJEU and below threshold notices. The tender process can be managed online with options to attach and send documents, activate online Q&A and receive completed tender submissions online using the tender submission post box.

To find out more about the Restricted Stage 2 function, view the [Stage 2 Notice](#) guide on the [User Guides help page](#).

My Stage 2 Notices

- [My Unpublished Stage 2 Notices](#)
- [My Published Stage 2 Notices](#)

Authority Stage 2 Notices

- [Authority Unpublished Stage 2 Notices](#)
- [Authority Published Stage 2 Notices](#)



How to create a Stage 2 Notice

A Stage 2 notice can only be created once the deadline for the first stage notice has passed. To create a Stage 2 notice you must access your Published Notice Workspace and click on the contract notice used to advertise the first stage of the process.

A new box will appear on the Notice Status page entitled “Restricted Procedure Stage 2” with the option to “Continue”.

Published Stage 1 Notice Status

Notice Status

Restricted Procedure Stage 2

This Restricted Procedure notice has passed the deadline date for expressions of interest and the second stage of the Restricted Procedure process is now available.
Click *Continue* to create and send invitations to tender to short listed candidates.

[Continue](#)

Notice Wizard Details

Document ID: 613 [View the original text](#)

Title: **Plant Hire**

Type of Document: **Site Notice**

Type of Notice: **Contract Notice**

Services/Supplies: **Supply Contract**

Procedure Type: **Dual stage procedure**

Is Accelerated: **No**

Document Source: **Wizard**

Status: **Dispatched**

Created: 13/05/2013 14:54 by Jane Brown

Last Amended: 13/05/2013 14:58 by Jane Brown

Released: 13/05/2013 14:58

[Copy](#) [Award](#)

On clicking “Continue” you will be taken to the outset of Stage 2 Notice creation where you can work through each question by using the “Next” button or by using the drop down menu “Jump To”.

On clicking “Continue” the notice is saved to your Unpublished Stage 2 Notice workspace where you can edit and store the Stage 2 notice in the same fashion as standard notices. The answer to each question is stored when the “Next” or “Save” buttons are clicked and you can stop at any point during the process and return later to complete all of the questions.



Note: You can only create one Stage 2 Notice per Contract Notice. Once you have created a Stage 2 Notice from a Contract Notice the “Continue” option will disappear. You can only create a new Stage 2 Notice by deleting an existing unpublished Stage 2 notice or cancelling a distributed one.

Outset of Stage 2 Notice Creation – Edit Restricted Stage 2 Notice page

Edit Restricted Stage 2 Notice

Please update the notice details.

Go to question:

Stage 2 Details

Descriptive title:

Type of Notice:

Nature of Notice:

The Stage 2 notice is made up of the following Questions:

Purchasing authority details

These are copied over from the original notice.

Contract Title

This is copied over from the original notice.

Description of the Contract Requirements

This is copied over from the original notice.

Total Quantity or Scope

Insert details of the quantity or scope of the contract.

Deadline for submission of Tenders

The deadline for completed tenders to be returned. If using the electronic post box this will be the deadline the post box closes.

Additional Information

A free text box for any supplementary information.

Additional Options

Here you must select whether you want to use the electronic post box for receipt of tenders. You can also use the Questions and Answers and Additional Documents function.

Administrator Access

Select the members of the authority who require the ability to edit and add further information to the notice once it has been distributed.



Additional Documents (if option selected)

Upload all documents to be distributed to the suppliers. There is no individual file size limit but the total file size of all documents should not exceed 100Mb.

Questions and Answers (if option selected)

Select the main administrative contact who will be responsible for receiving and responding to questions.

Postbox Opener (if option selected)

Select the user(s) to open the postbox and download the tender responses. Users must have "Opener" access in order to be selected here. For further information see the Postbox user guide.

Once you have answered all the relevant questions Stage 2 Notice creation is complete and you have the option to preview it, distribute it or return to your notice workspace.

How to distribute a Stage 2 Notice

When you are ready to distribute the Stage 2 notice you must click the "Distribute the Notice" link to start the distribution process:

Restricted Procedure Stage 2 Creation Complete page

Restricted Procedure Stage 2 Creation Completed

Congratulations, you have completed the data entry for the following Restricted Procedure Stage 2:

619 - Plant Hire

Note: The Restricted Procedure Stage 2 will not be published until you release it for distribution.

You can now carry out the following actions:

- [Preview the notice.](#)
- [Distribute the notice.](#)
- [Return to your notice list and publish later.](#)



Alternatively, if you are returning to the Stage 2 Notice from your Unpublished Stage 2 Notices list in your Stage 2 Control Panel, click on the title of the Stage 2 Notice and then the “Publish” button.


My Unpublished Stage 2 Notices

My Unpublished Stage 2 Notices

[Stage 2 Control Panel](#) > My Unpublished Stage 2 Notices

Detailed below is a list of your Stage 2 Notices awaiting publication. *Click* a notice title to view further information.

1 records found. Jump to page of 1 ⏪ ⏩

Title	Created
 Plant Hire	14/05/2013

Stage 2 Notice Status page

Stage2 Notice Status
Pre-Publication Details

Document ID: 619 [View Pre-Publication Stage 2 text](#)

Title: **Plant Hire**

Services/Supplies: **Supply Contract**

Document Source: **Wizard**

Status: **Not Released**

Created: 14/05/2013 16:31 by Jane Brown

Last Amended: 14/05/2013 16:37 by Jane Brown

Released:

Original Notice: [View the Stage 1 Notice](#)

You will then be directed to the Stage 2 Distribution Page where you will select the suppliers that you want to invite to tender.

If you have used the postbox for the first stage notice then a list of all suppliers who submitted a response will be presented to you in the “Postbox Responses” tab, in the “Distribution List” box.



Stage 2 Details page Distribution List – Post Box Responses Tab

Distribution List

Postbox Used

There were 3 Postbox responses received in the original notice.

[Distribution List](#) [Postbox Responses](#) [Search For Suppliers](#)

Below is a list of all the suppliers who can be added to the distribution list. Select the suppliers you wish to add then click Add.

<input checked="" type="checkbox"/>	DWD Plant Hire Ltd John Cardiff - info@dwdplanthireltd.co.uk	Add
<input checked="" type="checkbox"/>	Walter Road Plant hire Ltd Walter Road - walter@wrplanthireltd.co.uk	

To add suppliers you wish to invite to tender to the distribution list you must tick the box to the left hand side of the supplier name and click "Add". You can add multiple suppliers at one time.

Each supplier you add is listed in the distribution list tab. If you wish to remove someone from the distribution list you can click "delete" next to their name.

Stage 2 Details page Distribution List – Distribution List Tab

Distribution List

Postbox Used

There were 3 Postbox responses received in the original notice.

[Distribution List](#) [Postbox Responses](#) [Search For Suppliers](#)

Below is a list of all the suppliers selected to be added for the distribution list. Note: You can remove suppliers from the list prior to distribution by using the 'delete' link next to the suppliers name.

Delete	Walter Road - walter@wrplanthireltd.co.uk
Delete	John Cardiff - info@dwdplanthireltd.co.uk

If there are suppliers you wish to add who did not submit to the postbox in the first stage notice you can search for them using the "Search For Suppliers" tab. Type the company name into the "Search for" field and click "Search".



Llywodraeth Cymru
Welsh Government

www.cymru.gov.uk

Stage 2 Details page Distribution List – Search for Suppliers Tab

Distribution List

Postbox Used

There were 3 Postbox responses received in the original notice.

[Distribution List](#) [Postbox Responses](#) [Search For Suppliers](#)

Enter a **company** name in the box below to search for suppliers. Select the suppliers you wish to add then click Add.

Search for: [Search](#)

Riverside Plant hire [Add](#)
Francis Doyle - supplier1@riversideplanthire.co.uk

Once you are happy with the distribution list, click “Distribute” in the “Stage 2 Details” box.

Please note that you can add suppliers to the distribution list after it has been distributed.



Distribute Restricted Procedure Stage 2

Distribute Restricted Procedure Stage 2

This page will allow you to distribute your Restricted Procedure Stage 2 Notice to one or more suppliers. Below are details of the Stage 2 Notice. To distribute the notice you must add suppliers to the distribution list.

Please note: The portal does not inform unsuccessful bidders from the first stage that they have not qualified for the second stage. Please ensure you contact these users outside of the portal to inform them of this.

Stage 2 Details

Title: Plant Hire
Type of Notice: Stage 2
Nature: Supply Contract
Deadline: 22/05/2013 12:00:00

Distribute

Cancel

Distribution List

Postbox Used

There were 3 Postbox responses received in the original notice.

Distribution List Postbox Responses Search For Suppliers

Below is a list of all the suppliers selected to be added for the distribution list. Note: You can remove suppliers from the list prior to distribution by using the 'delete' link next to the suppliers name.

Delete	Francis Doyle - supplier1@riversideplanthire.co.uk
Delete	John Cardiff - info@dwdplanthireltd.co.uk
Delete	Walter Road - walter@wrplanthireltd.co.uk

Clicking "Distribute" will send an e-mail to all suppliers on the list informing them of the Invitation to Tender and asking them to log into the site to accept or decline the invitation. The Stage 2 notice will automatically be added to the selected supplier's Interest List.

Note: The e-mail address in the "from" field of this e-mail is marked as your own therefore any direct responses to the e-mail will be sent to your registered e-mail address. This may include "Out of Office" replies or "Undeliverable email" messages which will notify you the supplier may not have received the e-mail. If you receive notification of this nature please follow this up with the supplier and, if necessary, the Support Desk.



Administering a distributed Stage 2 Notice

Once distributed, the Stage 2 notice will be added to your Published Stage 2 Notice Workspace from where the Administrators selected during notice creation can access and administer it.

My Published Stage 2 Notices

My Published Stage 2 Notices

[Stage 2 Control Panel](#) > My Published Stage 2 Notices

Detailed below is a list of your published Stage 2 Notices. *Click* a notice title to view further information.

1 records found. Jump to page of 1



Title	Deadline	Published
 Plant Hire	22/05/2013	14/05/2013

As with a standard notice you can:

- Change the deadline
- Cancel the notice
- Add additional information
- Add additional documents
- Respond to Questions and Answers
- Access the electronic post box

All updates made to the notice will be communicated to the distribution list by e-mail.

You can also add suppliers to the distribution list after you have dispatched the notice.



Published Stage 2 Workspace – Stage 2 Notice Status

Stage2 Notice Status

Pre-Publication Details

Document ID: **619** [View Pre-Publication Stage 2 text](#)
Title: **Plant Hire**
Services/Supplies: **Supply Contract**
Document Source: **Wizard**
Status: **Dispatched**
Created: **14/05/2013 16:31 by Jane Brown**
Last Amended: **14/05/2013 16:37 by Jane Brown**
Released: **14/05/2013 16:59**
Original Notice: [View the Stage 1 Notice](#)

Published Details

Tender ID: **MAY045489**
Action: [View Published Stage 2 notice](#)
[Change Stage 2 Deadline](#)
[Cancel Stage 2](#)
Title: **Plant hire**
Published: **14/05/2013 16:59 by Jane Brown**
Tender Deadline: **22/05/2013 at 12:00:00**
Archived Date: **-**
Visible On Site: **No**
Distribution List: **4 supplier(s) currently in distribution list**
[View Distribution List](#)
[View access to distribution list](#)
[Add supplier to distribution list](#)

View Stage 2 Distribution List

By clicking on “View Distribution List” you can see a list of suppliers you have invited to tender.

You will also see whether they have accepted or declined the invitation to tender. In the example below one supplier has confirmed they will submit a bid, one has declined and four have not responded. **You may wish to contact the suppliers who have yet to respond to ensure they have received the e-mail.**



Published Stage 2 Notice – Suppliers on Distribution List page

[Return to notice status](#)

Suppliers on Distribution List

Id	Supplier	Company	Manual Bid	Confirmation	Invited On	Invited By
161	Andrew Bay	Bay Supplies and plant hire	No	No Response	14/05/2013 17:01	Jane Brown
143	Walter Road	Walter Road Plant hire Ltd	No	Declined	14/05/2013 16:59	Jane Brown
144	Francis Doyle	Riverside Plant hire	No	No Response	14/05/2013 16:59	Jane Brown
142	John Cardiff	DWD Plant Hire Ltd	No	Confirmed	14/05/2013 16:59	Jane Brown

Recording a Manual Response

If responses are not being received in the postbox you may wish to record a manual submission by clicking on the relevant supplier name and adding the date and time their response was received, along with any additional comments.

For guidance on how to use the postbox please refer to the relevant user guide.