HOW TO MANAGE YOUR ACCOUNT ON CSW-JETS

How to add a New Contact on your Company Details:

- 1. Login to the Homescreen
- 2. Click on the Company Details tab
- 3. Click on the Contact Details tab
- 4. Select New Contact and complete the relevant and mandatory fields
- 5. Click on Save Contact



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firm Email :					
ile:					
Title :					
artment :					
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word :					
firm Password :					

How to update your Business Classifications:

- 1. Login to the Homescreen
- 2. Click on the **Company Details** tab
- 3. Click on the **Business Categories** tab
- 4. Search for the category which best suits the type of work you undertake. You can choose as many categories as is relevant and you can update these categories at any time. For a full list of available Categories please go to <u>www.proclass.org.uk.</u>

If you type [space] 3 times and press **Search**, the entire list will appear for you to choose a Business Category from.

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Address	Company	Banking	nsurance C	ther A	ccreditation	Categories	Summary			
Company N	ame :	Coventry Pro	curement Servi	ces 2						
Other Name	e:									
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Classifica	tions									
Please typ	pe in a keyword a	nd click "Search". To	add a classificatio	n, use the "+" i	icon.					
informa	ation								Search	Clear
Catego	ry Title									
270000) Infor	mation Communicat	ion Technology							+

5.	Click on the Blue Plus sign next to the category you require, and it will add to the list at the bottom
	of the screen. If you need to delete a category you have added, you can click on the Red Cross to
	remove it from your list.

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NB: We suggest that you maybe include the general header of your relevant Business Classification. This will ensure that you get notified of anything relating to your Business. For example, for ICT, make sure to select 27000 as well as the ones that are more specific to your Business.

271000

271100

271200

271210

279999

271400

271501

271510

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Information Communication Technology - Call Systems

Information Communication Technology - Consumables

Information Communication Technology - Not Elsewhere Classified

Information Communitation Technology, Company, Claud Company

Information Communication Technology - Office & Reprographics Equipment

Information Communication Technology - Services - Application Service Provision

Information Communication Technology - Hardware

Information Communication Technology - Leasing

Information Communication Technology - Services

Category	Title	
270000	Information Communication Technology	+
271000	Information Communication Technology - Call Systems	+
271100	Information Communication Technology - Consumables	+
271200	Information Communication Technology - Hardware	+
271210	Information Communication Technology - Leasing	+
279999	Information Communication Technology - Not Elsewhere Classified	+
271400	Information Communication Technology - Office & Reprographics Equipment	+
271501	Information Communication Technology - Services	+
271510	Information Communication Technology - Services - Application Service Provision	+
271516	Information Communication Technology - Services - Cloud Services	+

- 6. Once you have completed the Business Category Tab please check all the other tabs to make sure your company details and contact details are all up to date.
- 7. If you have received an email stating, there is an "Action" against your account please click on the Purple Messages Tab and then on "Actions". You will then see the message about the action required. Once you have done what is requested **please make sure you click on "Complete Action" to ensure you receive no further reminders for this Action**.

How to amend Contact Details under your Company Details:

- 1. Login to the Homescreen
- 2. Click on the **Company Details** tab
- 3. Click on the **Contact Details** tab
- 4. Select **the correct account within the top dropdown** and amend the relevant and mandatory fields where necessary
- 5. Click on **Save Contact**

Company Details	
Details Documents	Business Categories Contact Details
If you would like to Edit a	in existing Contact, please select the Contact name from the Dropdown Menu.
Contact:	New Contact
Title:	New Contact Procurement Services 2
First Name :	
Surname :	
Telephone :	
Fax:	
e-Mail:	
Confirm Email:	
Mobile :	
Job Title :	
Department :	
Office :	
Password :	
Confirm Password :	
	Send a copy of all e-Mails to this user
	Don't send project correspondence
	Seve Contact
Key: Mandatory	

How to change the password under your Company Details:

- 1. Login to the Homescreen
- 2. Click on the Company Details tab
- 3. Click on the **Contact Details** tab
- 4. Select **the correct account within the top dropdown** and amend the password fields where necessary. Make sure the **Send Emails to this User** is ticked.
- 5. Click on **Save Contact**

ompany Details	
Details Documents	Business Categories Contact Details
If you would like to Edit an	existing Contact, please select the Contact name from the Dropdown Menu.
Contact:	Procurement Services 2
Title:	
First Name :	Procurement
Surname :	Services 2
Telephone :	
Fax:	
e-Mail :	csw-jets@coventry.gov.uk
Confirm Email :	csw-jets@coventry.gov.uk
Mobile :	
Job Title :	
Department :	
Office :	
Password :	
Confirm Password :	
	Send a copy of all e-Mails to this user
	Don't send project correspondence
	Don't send contract correspondence
	Remove Contact Save Contact
ley: Mandatory	

How to remove a User under your Company Details:

- 1. Login to the Homescreen
- 2. Click on the **Company Details** tab
- 3. Click on the **Contact Details** tab
- 4. Select **the correct account within the top dropdown** and amend the password fields where necessary.
- 5. Click on **Remove Contact**
- 6. Click on Save Contact

ompany Details	
Details Docu	ments Business Categories Contact Details
If you would like t	p Edit an existing Contact, please select the Contact name from the Dropdown Menu.
Contact :	Procurement Services 2
Title :	
First Name :	Procurement
Surname :	Services 2
Telephone :	
Fax:	
e-Mail :	csw-jets@coventry.gov.uk
Confirm Email :	csw-jets@coventry.gov.uk
Mobile :	
Job Title :	
Department :	
Office:	
Password :	•••••
Confirm Password :	•••••
	Send a copy of all e-Mails to this user
	Don't send project correspondence
	Don't send contract correspondence
ey: Mandatory	Remove Contact Save Contact

How to add or amend documents on your account:

- 1. Login to the Homescreen
- 2. Click on the **Company Details** tab
- 3. Click on the **Documents** tab
- 4. Select the type of Document
- 5. Input an expiry date by clicking on the calendar icon
- 6. Click on Upload Document
- 7. Next to the Uploaded Document, click on Replace if the document has expired and needs to be replaced
- 8. Next to the Uploaded Document, click on Archive if the document is to be archived and replaced.

Document Title	Status	Expires	Date Added	Туре	Options
Internet Page - CCC.xisx	Document available	🛕 19/Aug/2020	25/Aug/2020	General	View Download History Replace
Jpload Company Docum	ent				
Ipload Company Docum ype:	ent	General			¥
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