

# Providers' User Manual

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1. Introduction

This document is the User Manual for Providers who wish to register on the eMarketplace / Directory in order to promote their organisation and its services.

Please note: Images in this document may vary slightly in appearance from the site

## 2. Provider Registration

Please follow these instructions to register as a provider on the eMarketplace / Directory.

- a) Access the website. This will take you to the homepage
- b) Click on the 'Register' button.
- c) Click on the 'Register as a Provider' button.
- d) Screen 1 of the Provider Registration process is displayed

1. Account name	2. Business details	3. Terms & conditions	4. Complete
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 This page is for businesses or organisations to register their details if they wish to provide - via this site - their products or services in Adult Social Care to residents of the London Borough of Hammersmith & Fulham, the Royal Borough of Kensington and Chelsea or Westminster City Council.

All fields marked with \* are required.

### Account details

Username \*  
  
This is what you will use to login

Password \* Password again \*

6 characters or longer with at least one number is safest Retype your password for verification

[Continue](#)

- Enter the username that you want to use for the site
  - Enter the password that you want to use (6 characters minimum)
  - Re-enter the password
  - Click 'continue'.
- e) Screen 2 of the Provider Registration process is displayed

1. Account name	2. Business details	3. Terms & conditions	4. Complete
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All fields marked with \* are required.

**Personal details**

Title \*

First Name \*

Last Name \*

**Business address**

Postcode \*

Enter your postcode and we will find your address for you.

Organisation \*

Address Line 1 \*

Address Line 2

Address Line 3

Optional

Address Line 4

Address Line 5

Optional

Town \*

County \*

- Select a title from the pull down menu (mandatory field)
- Enter the first name of the individual you want associated with the account (mandatory field)
- Enter the last name of the individual you want associated with the account (mandatory field)
- Contact address
- Enter your postcode (mandatory field)
- Select your address from the pull down. This will populate the address fields with the selected address details. Please note that these details can be manually overwritten.
- Contact details
- Enter the e-mail address you would like to be associated with the account (mandatory field)
- Confirm the e-mail address (mandatory field)
- Enter your home phone number
- Enter your work phone number (mandatory field)
- Enter your mobile number
- Areas you cover:
- Select the local authorities you wish to deliver products and services within.
- Click 'Next step' button.

f) Screen 3 of the Provider Registration process is displayed.

This screen shows the site Disclaimer and the Terms and Conditions. Please read these. Once you have read, understood and accepted the Disclaimer and the Terms and Conditions, you should record this by clicking on the check box.

Click on the 'Complete Registration' button to complete the registration process.

Please note that any logged in session that has been inactive for more than 20 minutes is automatically terminated.

Once completed, a confirmation e-mail will be sent to the e-mail address that has been associated with the account. The e-mail will contain a link that must be clicked on in order to activate registration; the link will take you to the screen below where you can log in to the website using your username and password.

Once you have registered, you must be approved by the relevant Councils within which you have selected to sell your Services and products.

Please note that none of the items in your catalogue will appear on the front end of the Site service until your access has been approved by the relevant Council(s).

### 3. Logged in Home page

Your account homepage will be displayed as a new provider checklist, while you are still applying for Authority Approval. Once approved, the account details will be editable at any time by clicking on the appropriate links.

At the top of the screen, clicking on the logo will take you to the site's homepage

(You can return to your logged in homepage by clicking on the 'My Account' button).

Also at the top of the screen is the facility to change the font size, and logout.

The 'Search Services' and 'Search Products' can be used to search your catalogue.

## User info

[Account details](#)

[Messages](#)

0

[Call backs](#)

0

[Contact us](#)

[Logout](#)

The left hand navigation panel contains the following links and will notify you when you have new messages, quotes, requests and call backs:

## 4. New provider check list

The Provider logged home page will initially contain a new provider check list; this is the list that needs to be completed before approval from the local authority can be requested. Once the 6 steps have been completed as appropriate then you can click 'Apply for approval'.

Colour coding is used to show the status of the specific information:

- Green – The minimum amount of information has been provided
- Amber – Some information has been provided, but it is not enough to be approved
- Red – No information has been provided in this area

### New provider check-list

Please follow these steps to help you get your approval as quickly as possible.

<b>Business details</b> Enter your place of business details	1
<b>Approval</b> Enter documentation for any approvals available	2
<b>Homepage</b> Enter details for your on-site homepage	3
<b>Delivery price</b> Enter details of your delivery costs	4
<b>Terms and conditions</b> Enter your business terms and conditions	5
<b>Catalogue</b> Add some <a href="#">products</a> or <a href="#">services</a> to your catalogue	6

[Apply for approval](#)

## 4.1 Business details



### Provider details:

- Enter the name of the business or organisation in provider name (mandatory field).
- using the drop down menu select the provider type you are
- in business details enter the company number and select the box if your business/ organisation is VAT registered, If VAT registered then you must enter the VAT number.

### Provider address:

- if address is not filled in then enter your Post Code (mandatory field).
- Select your address from the pull down. This will populate the address fields with the selected address details. Please note that these details can be manually overwritten.

### Contact hours:

- Enter the hours you want to be contacted e.g. 9.00-12.00 and 13.00-17:00

### Website:

- Enter your business or organisation's website address

### Areas you cover:

- Select the box of the councils you want to operate within.
- Select the level of approval required
- Select the postcodes for the areas where your services or products are available to.

## 4.2 Approval



This is the place to upload the documents required by the local authority to approve you as a provider onto the site.

Please check the relevant Council's approval process to find out the documents that you need to be attaching, dependent on the service you are providing.

To upload a new document, enter the document's title, Select the file you wish to upload by clicking on 'choose file', browse to the document and double click it. Select the appropriate tag for the document from the dropdown menu options.

Valid Dates allows you to record the valid start and end dates for the approval document that you are uploading, e.g. for insurance documents. You can enter these dates by clicking on the calendar.

Click 'submit' to upload the document and create the approval record

## 4.3 Homepage



### **Business description:**

You can write a description about your company this will provide an introduction to your organisation and what you offer. Any information you feel will help people interested in your organisation decide whether or not you are the right provider for them should be included.

NOTE. You will have the chance to describe in detail, each product and service you have on offer in step 6

### **Upload vendor image:**

You can upload an image that represents your business or organisation by clicking on

'Choose file'. Browse to the document and double click it.

Please note that the quality of the image uploaded is important for you as an organisation – a low quality logo or image will not show your organisation to its best advantage.

### Display address and map:

Select the box if you would like to display your address and map on the homepage

### Testimonials:

Click on the green box 'Add testimonial +' to add testimonials from customers that Will help users when choosing your company/organisation.

Testimonials

---

[Add testimonial](#)

[Back](#) [Submit](#)

Enter the testimonial comment in the new page and in the 'made by' box enter the customer's name who gave the testimonial, and then click Save.

Testimonials

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Check the box and the testimonial will be used on your homepage.

Stephanie said:  
Great Company!

[Edit](#) [Delete](#)

[Add testimonial](#)

[Back](#) [Submit](#)

Once the testimonial has been saved if you want to include it onto your homepage then you must select the box to the left of the testimonial.

## 4.4 Delivery Price

For businesses or organisations that are providing products that require delivery costs, then the cost of post and packaging should be added by clicking on the 'add new delivery cost'.

Provider My account Services Products Homepage Call backs

For businesses or organisations providing products, complete the relevant boxes to ensure your costs for post and packing are up-to-date.

Description	Standard Cost	Express Cost	Update	Delete
No Cost	0.0		<a href="#">Update</a>	<a href="#">Delete</a>

Back [Add new delivery cost](#)

Enter a description of the cost (mandatory field).

Provider My account Services Products Homepage Call backs

Description \*

Standard Cost £   
Enter numeric value only eg (10.99)

Express Cost £   
Enter numeric value only eg (10.99)

Back [Update](#)

Enter the standard cost of delivery and, if applicable, the cost of Express delivery.

## 4.5 Terms and conditions

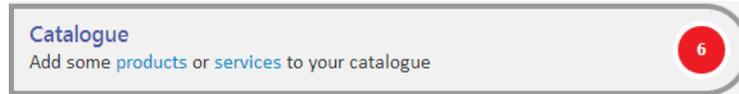
[Terms and conditions](#)  
Enter your business terms and conditions 5

All providers should define their Terms and Conditions that you would like Service Users to read, as this sets out the commercial contract between you and your customers. These should be entered into the text box. If you do not have your own Terms and

Conditions and would like to use the default ones provided, please click on the Set Default Terms button. The default Terms and Conditions will then be displayed in the textbox for you to amend as necessary.

Once you are happy with your Terms and Conditions, please click the 'submit' button. Service Users will have to accept these Terms and Conditions when they purchase your services and/or products.

## 4.6 Catalogue

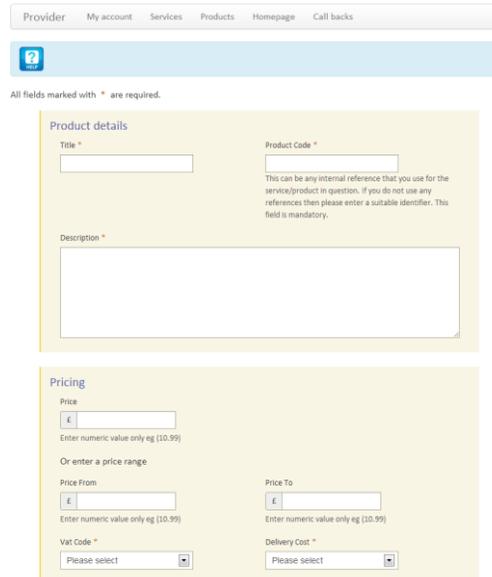


Use this section to give detailed information about each of the products or services you are making available to people using this website. An example of a product is a shower stool - that is, something that somebody is able to physically use. A home visit, physiotherapy and transport are examples of services.

Select either products or services that you wish to provide.

### 4.6.1 Adding a product

- Click on products. The add product screen will be displayed:

A screenshot of a web form for adding a product. At the top, there is a navigation menu with links for "Provider", "My account", "Services", "Products", "Homepage", and "Call backs". Below the menu is a blue bar with a question mark icon. A note states "All fields marked with \* are required." The form is divided into two main sections: "Product details" and "Pricing". The "Product details" section includes a "Title \*" field, a "Product Code \*" field with a note explaining it's an internal reference, and a "Description \*" field. The "Pricing" section includes a "Price" field with a pound sign, a "Price From" and "Price To" section for a price range, and "Vat Code \*" and "Delivery Cost \*" dropdown menus.

#### Product details:

- a) Enter the title of the Product. This will be used as the title of the Product when it is displayed on the front end. This is also used by the search engine to help deliver appropriate search results to end users. This is a mandatory field.

- b) Enter a Product Code. This can be any internal reference that you use for the Product in question. If you do not use any references then please enter a suitable identifier. This field is mandatory.
- c) Enter a description. Please add a suitable description of the Product you are providing. Please note that the field has a 2,000 character limit. The content of the field is used by the search engine to help deliver appropriate search results to end users. This is a mandatory field.
- d) Enter a price (numeric characters and decimal point only), or enter a price range (From and to) if this is more appropriate.
- e) Select the most appropriate unit from the Price Description pull down.
- f) Select the appropriate VAT code from the VAT Code pull down.
- g) Select the relevant Delivery Code from the Delivery Code pull down. If there is no suitable delivery code then you can set one up using the 'Delivery Matrix' link on the Provider's home page. Please see below for further instructions on how to use this feature.
- h) The following checkboxes should then be completed as appropriate:

Item is VAT exempt for registered disabled

Checking this box will ensure that the Product is VAT rated at '0' for registered Disabled users.

Card payment allowed

Checking this box will allow the users to pay you for the Product with a credit or debit card via the website.

Accept quotes on this item

Checking this box will allow users to contact you to request a personal quote for the advertised Product.

Accept 'call me back' requests on this item

Checking this box will allow users to send you their contact details and a time

window when they would like you to contact them to discuss the Product.

**Display item**

This box must be checked to allow the Product to appear in your catalogue on the front end of the service.

- i) Select a Category from the pull down menu. This will define where the Product will sit within the category structure on the front end. Please note that you can only select one category. If you want a Product to appear in more than one category then you will need to create an individual Product record for each category.

**Upload an image:**

The system allows you to upload an image that will appear on the front end of the website when viewed by an end user. To upload the image, save a copy of the image on your machine and then use the browse button to navigate to where you have saved the image. Double click on the image to upload it.

**Product Needs:**

The system includes a facility for end users to identify their specific needs and filter their searches to only show results that relate to these specific needs. If your Product is specific to a particular need, then ensure that you select the relevant Product Needs check boxes from those available.

Once you are happy that the record has been entered accurately, click on the 'Add Product' button. The record will be added to your catalogue. If the record fails validation, then a suitable error message will be displayed. Please update the record to correct the error and submit again until the record is accepted without error.

**4.6.2 Adding a service**

- Click on services, the add service screen will be displayed:

**Service details:**

Enter the title of the Service. This will be used as the title of the service when it is displayed on the front end. This is also used by the search engine to help deliver appropriate search results to end users. This is a mandatory field.

- a) Enter a Product Code. This can be any internal reference that you use for the

service in question. If you do not use any references then please enter a suitable identifier. This field is mandatory.

- b) Enter a description. Please add a suitable description of the service you are providing. Please note that the field has a 2,000 character limit. The content of the field is used by the search engine to help deliver appropriate search results to end users. This is a mandatory field.
- c) Enter a price (numeric characters and decimal point only), or enter a price range (From and to) if this is more appropriate.
- d) Select the most appropriate unit from the Price Description pull down.
- e) Select the appropriate VAT code from the VAT Code pull down.
- f) Select the relevant Delivery Code from the Delivery Code pull down. If there is no suitable delivery code then you can set one up using the 'Delivery Matrix' link on the Provider's home page. Please see below for further instructions on how to use this feature.
- g) The following checkboxes should then be completed as appropriate:

Item is VAT exempt for registered disabled

Checking this box will ensure that the service is VAT rated at '0' for registered disabled users.

Card payment allowed

Checking this box will allow the users to pay you for the service with a credit or debit card via the website.

Accept quotes on this item

Checking this box will allow users to contact you to request a personal quote for the advertised service.

Accept 'call me back' requests on this item

Checking this box will allow users to send you their contact details and a time window when they would like you to contact them to discuss the service.

Display item

This box must be checked to allow the service to appear in your catalogue

on the front end of the service.

- h) Select a Category from the pull down menu. This will define where the Service will sit within the category structure on the front end. Please note that you can only select one category. If you want a service to appear in more than one category then you will need to create an individual service record for each category.

### **Upload an image:**

The system allows you to upload an image that will appear on the front end of the website when viewed by an end user. To upload the image, save a copy of the image on your machine and then use the browse button to navigate to where you have saved the image. Double click on the image to upload it.

### **Service Needs:**

The system includes a facility for end users to identify their specific needs and filter their searches to only show results that relate to these specific needs. If your service is specific to a particular service need, then ensure that you select the relevant Service Needs check boxes from those available.

Once you are happy that the record has been entered accurately, click on the 'Add Service' button. The record will be added to your catalogue. If the record fails validation, then a suitable error message will be displayed. Please update the record to correct the error and submit again until the record is accepted without error.

Once all the steps from 1-6 are completed as appropriate then you can apply for approval by clicking on the 'Apply for approval' button.

## 5. Account management

Once you have applied for approval the provider home page will then state, "Currently awaiting approval"

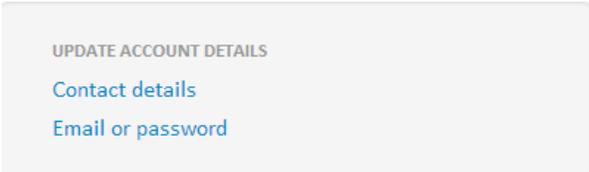
There is a navigation bar which contains quick links to the core functions:



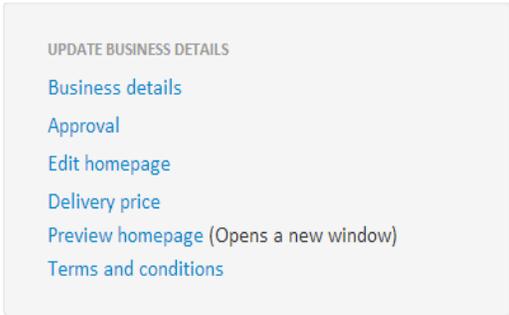
The account Management section features 5 main sections:

This allows you to maintain and control the Services and Products that you advertise.

This allows you to maintain the account details; you can change your contact details as well as resetting an e-mail or password.

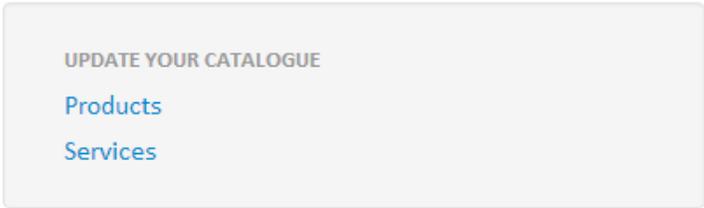


This allows you to maintain your organisations recorded business details; manage the payment service; upload relevant approval documentation; create and maintain a 'home page' for users if they click on a link on the home site to see your organisations details; manage and maintain delivery charges; preview your organisation's home page; and, enter your own organisations Terms and Conditions.

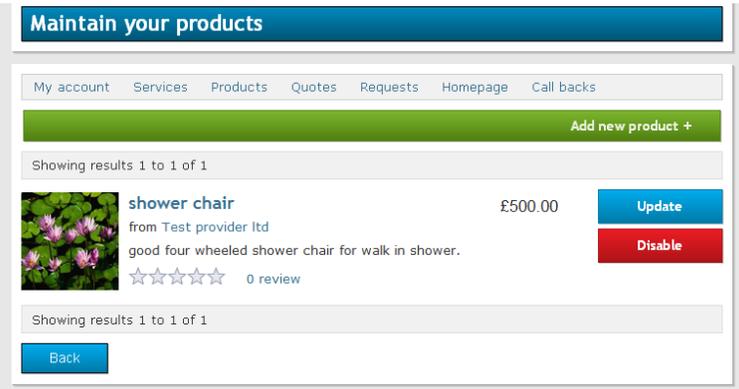


## 6. Update your catalogue

### 6.1 Manage catalogue



By clicking on 'Products' or 'Services' you can see what items you have added.



By clicking 'Update' you can edit the product/service you have added. You can also click 'Disable' which means that the product/service cannot be viewed by the users.

## 6.2 Adding a service to your catalogue

You can add a service to your catalogue by clicking on 'Services' in the menu bar:



or by clicking the 'Services' link in the central panel 'Update your catalogue' box; and then clicking on the green 'add new service +' bar:

The add service screen will be displayed where you can input the appropriate information about the service.

## 6.3 Adding a product to your catalogue

You can add a service to your catalogue by clicking on 'Products' in the menu bar:

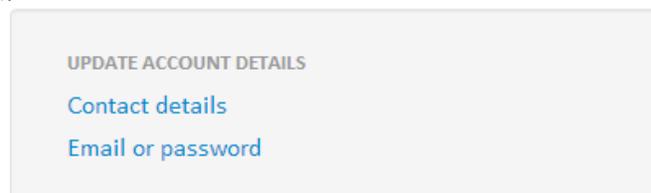


Or by clicking the 'Products' link in the central panel 'Update your catalogue' box and then clicking on the green 'Add new product +' bar:

The add product screen will be displayed where you can input the appropriate information about the product.

## 7. Update account details

The Update Account Details box at the bottom of the Provider Homepage contains links to access the recorded contact details and amend the associated account e-mail and password.



The contact details link allows you to maintain the associated contact name,

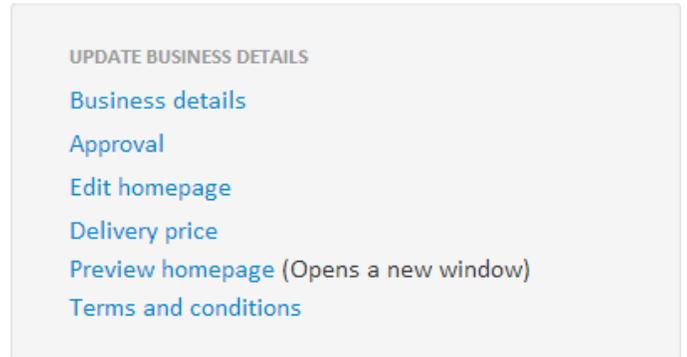
address and telephone number details.

The Email or password link allows you to amend the e-mail address associated with the account, or change the password.

## 8. Update business details

The Update business details box in the central navigation panel contains links to access the following functions:

- Business details
- Payment Service Details
- Approvals
- Edit homepage
- Delivery matrix
- Preview homepage
- Terms and conditions



### Business Details:

This link allows you to update and maintain the following information:

- Areas covered
- Provider Name
- Provider Type (Business or Charity)
- Company Number
- VAT Registered check box
- VAT Number
- Provider Address
- Contact hours

### Approval:

This link takes you to a screen that allows you to upload the relevant documentation required for approval. Approval requirements can be found in the links in the left on the Provider Homepage

The screen shows any approval evidence that has already been uploaded. These can be edited, removed or viewed using the available links.

You can also upload a new document on the following screen:

## Upload document

A screenshot of a form titled 'Upload document'. The form is on a light yellow background and has the following elements: a 'Document details' section with a 'Title' text input field; a 'Select a document' section with a 'Choose File' button and the text 'No file chosen'; a 'Tag this document' section with a dropdown menu showing 'CRB Check'; and two checkboxes: 'Show icon' and 'Allow document to be viewed'. Below the checkboxes is the text 'Will make the icon into a link'.

**Edit homepage:**

The link takes you to a screen which allows you to edit your business description upload an image and add testimonials.

**Delivery matrix:**

The link takes you to a screen where you can add delivery costs for postage and packaging your products if applicable.

**Preview homepage:**

This allows you to see what your business/ organisations home page will look like to other users.

**Terms and conditions:**

This link takes you to a screen where you can edit or add your terms and conditions.