

Supplier Portal – Managing Compliance

How to navigate around the Supplier functionality in the OFA platform

Contents

Managing Compliance

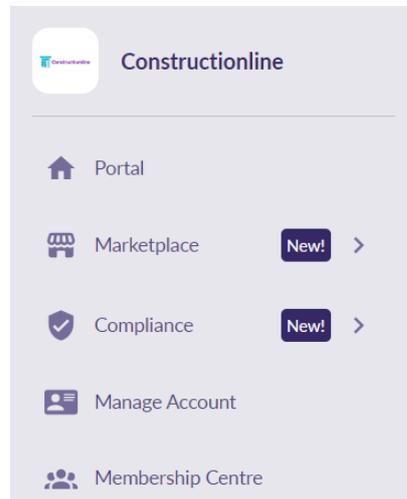
- Compliance 3
- Issues 4
- Company Profile 6
- Status 6
- Work Categories 10
- Download Certificates 12

Managing Compliance

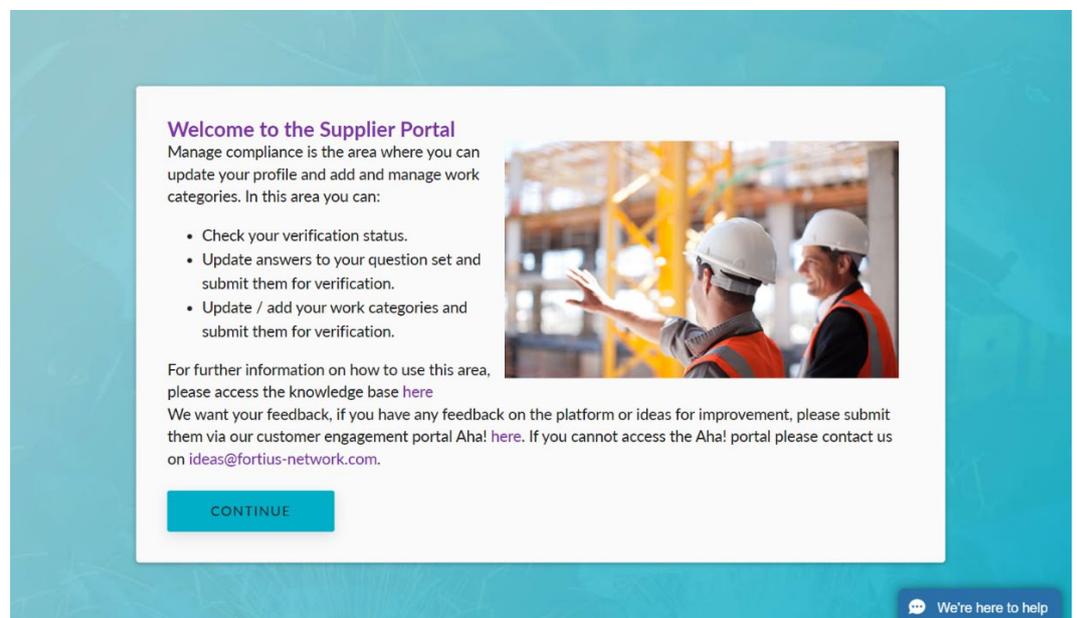
Manage Compliance

User permissions will determine what options are available to you on the left-hand side of the navigation.

To access the supplier functionality and manage your profile, click the **“Compliance”** option in the menu on the left.



Once you have selected this option, you will need to click **“Manage Compliance”**, and then select the **“Continue”** button.



Upon selecting the **“Continue”** button you will see the **“Manage Compliance”** page.

Managing Compliance

At the top of this page, you will see the following:

- **Company Name**
- **Constructionline Registration Number**
- **Membership Levels and Status**

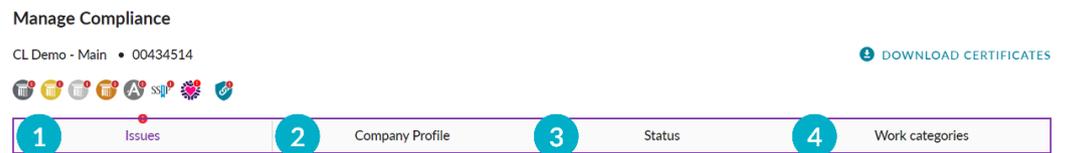
Manage Compliance

CL Demo - Main • 00434514



The page is split into four parts:

1. **Issues** – This is where you will see any rejected, expired, due to expire or not yet completed requirements.
2. **Company Profile** – This is where you can enter a summary of your company.
3. **Status** – This is where membership compliance can be managed, including your Buyer Connections.
4. **Work Categories** – This is where work categories can be managed.



Issues

Within the Issues area you will see three sections:

1. **Requirements** – This is where you will see any rejected, expired, due to expire or not yet completed requirements.
2. **Work Categories** – This is where you will see any rejected, expired, due to expire or not yet completed work categories.
3. **Buyer Connections** – This will show you any upgrade requests from Buyers.

Issues	Company Profile	Status	Work categories
Requirements 1			78 issues
Work Categories 2			102 issues
Buyer Connections 3			0 upgrade requests

The Requirements section will include the following:

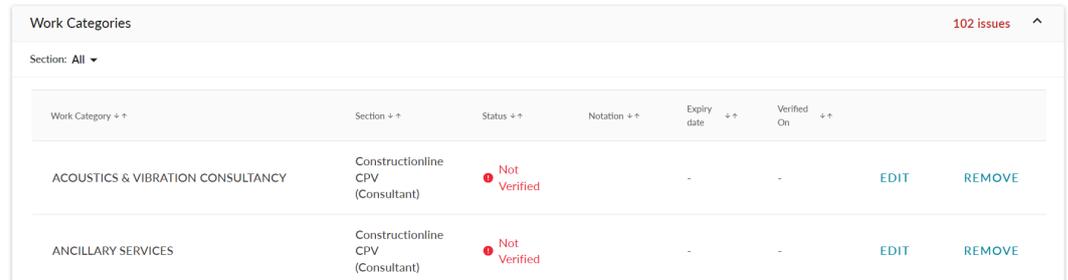
- **Requirement Name**
- **Status** – this will show either **Not Verified** or **Due to Expire**
- **Issues/Advisory** – the clock indicates expiry, the text bubble indicates feedback was left
- **Expiry Date**
- **Affecting** – click the “**Show**” drop-down to see which levels of membership or Buyer Connections the requirement is related to
- **Submission** – this will show if the requirement has **Missing Answers**, **Changed Answers**, is **Ready for Submission** or **In for Assessment**
- **Edit** – click this to open the requirement

Requirement	Status	Issues/Advisory	Expiry date	Affecting	Submission
Security Industry requirements	Not Verified		20/11/2021	SHOW	EDIT
Electrical requirements	Not Verified		03/12/2021	SHOW	EDIT
Structural / Civil Engineering requirements	Not Verified		01/01/2022	SHOW	Missing answers EDIT

The Work Categories section will include the following:

- **Work Category Name**
- **Section** – the type of work category
- **Status** – this will show either **Not Verified** or **Due to Expire**
- **Notation** – this will show the notation value of the category
- **Expiry Date**
- **Verified On**
- **Edit** – click this to open the category
- **Remove** – click this to remove the category

Managing Compliance

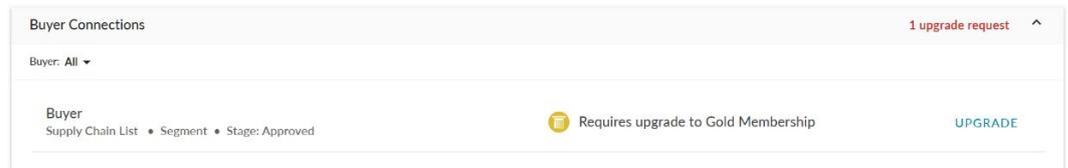


Work Categories 102 issues ^

Section: All ▾

Work Category ++	Section ++	Status ++	Notation ++	Expiry date ++	Verified On ++		
ACOUSTICS & VIBRATION CONSULTANCY	Constructionline CPV (Consultant)	Not Verified		-	-	EDIT	REMOVE
ANCILLARY SERVICES	Constructionline CPV (Consultant)	Not Verified		-	-	EDIT	REMOVE

The Buyer Connections section will include the following if you have been added to the supply chain of a Buyer that requires a different level of membership than you currently hold.



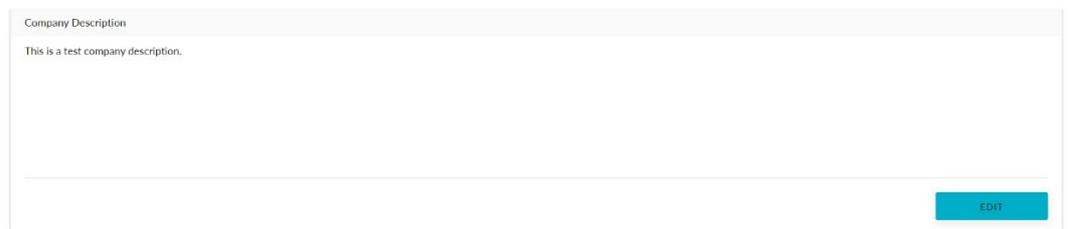
Buyer Connections 1 upgrade request ^

Buyer: All ▾

Buyer		
Supply Chain List • Segment • Stage: Approved	 Requires upgrade to Gold Membership	UPGRADE

Company Profile

Here you can enter a description of your company, what services, products, or materials you supply and any other information you would like Buyers to see.



Company Description

This is a test company description.

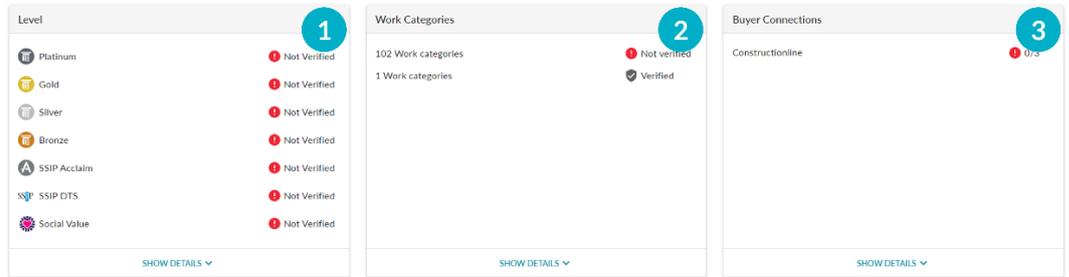
[EDIT](#)

Status

Within the status area you will see three sections:

- 1. Level** – This shows the plans you have along with the verification status for each.
- 2. Work Categories** – This shows the verification status for the work categories you have added to the account.
- 3. Buyer Connections** – This will show you the Buyers that have added you to their supply chain, along with the compliance status for those buyers.

Managing Compliance



Level - To view the details for compliance for the level you are on (e.g. Silver), you can select **“Show Details”** under the Level box.

Against each section, you can also see which sections are applicable to which plans, and what the verification status is for each section. To view details, select the downwards chevron next to that section.

This will show all requirements within each section. For example, the **“Identity”** section here includes the **“Head Office”** requirement.

The screenshot shows a table titled 'Level Requirements' with a sub-section for 'Identity'. The table has columns for Requirement, Status, Issues/Advisory, Expiry date, Affecting, Verified on, and Submission. The 'Primary Contact' row is highlighted in red, indicating it is 'Not Verified'.

Requirement	Status	Issues/Advisory	Expiry date	Affecting	Verified on	Submission
Head Office	Verified		10/10/2024	SHOW (4)	10/10/2023	Changed answers
Registered Office	Verified		25/01/2025	SHOW (4)	25/01/2024	
Primary Contact	Not Verified	Issues/Advisory	28/11/2023	SHOW (4)	28/11/2022	
Enquiry Contact	Verified		25/01/2025	SHOW (4)	25/01/2024	
Company Details	Verified		14/09/2024	SHOW (4)	14/09/2023	Missing answers

You can use this view to see all requirements, not just the ones that are due to expire or have expired as in the **“Issues”** tab. Click **“Edit”** to open any of the requirements.

The screenshot shows a form for a requirement titled 'Branch Office'. At the top, there is a 'SUBMIT' button and a 'READY FOR ASSESSMENT' checkbox. A red banner indicates 'This requirement has now expired. Please review your answers below and submit for assessment'. The form content includes the requirement title, status (Not Verified), expiry date (23/02/2022), last submission date (23/02/2021), and verifier. Below this, it asks for details of branch offices. A question 'Do you have any Branch offices?' is shown with radio buttons for 'No' (selected) and 'Yes'. A 'Changed answers' button is visible on the right.

After you have completed all questions, you can click the **“Submit”** button at the top of the screen to send this for assessment.

Managing Compliance

If you would like to group the assessments together and submit more than one, click the **“Ready for Assessment”** box. After you have done this, you can close the assessment and move to the next.

1 Requirements have been marked as ready for assessment

SUBMIT NOW

You will see this bar at the top of the Level section, when you are ready to submit the group of requirements, click **“Submit Now”**.

Work Categories - To view the details for your work categories, you can select **“Show Details”** under the Work Categories box.

Work category ++	Section ++	Expiry date ++	Verified on ++		
ACOUSTICS & VIBRATION CONSULTANCY	Consultant	N/A	N/A	EDIT	REMOVE
ANCILLARY SERVICES	Consultant	N/A	N/A	EDIT	REMOVE
ARCHITECTURE	Consultant	N/A	N/A	EDIT	REMOVE

Here you will see the categories split in Not Verified and Verified. Click **“Edit”** to open any of the category requirements.

Work Category: BUILDING SERVICES MEASUREMENT SURVEYS
Section: Consultant • Status: Not Verified • Notation value: • Expiry date:

Associated requirements are not verified

Enter a maximum contract value for which you have undertaken work for the above category in the past 2 years
Note that this value cannot exceed 75% of your current turnover.
Please be aware that you may need to provide a reference to support the value entered here.
For Consultant and Material Supplies categories the value entered should be the fee paid for the selected category.

You declared your current turnover to be: £500,000

£

Please specify, by selecting from the dropdown, to what extent you would sub-contract this category of work

Select...

The following requirements need to be met for this category.

Requirement ++	Status ++	Standard ++	Issued / Advisory	Expiry Date ++	Verified On ++	Affecting ++
Building Services requirements	Not Verified	Work Categories / Trades				SHOW (7) ↓ EDIT

In here you can provide information on the contract value for that work category.

Enter a maximum contract value for which you have undertaken work for the above category in the past 2 years
Note that this value cannot exceed 75% of your current turnover.
Please be aware that you may need to provide a reference to support the value entered here.
For Consultant and Material Supplies categories the value entered should be the fee paid for the selected category.

You declared your current turnover to be: £500,000

£

You can also select whether this work is sub-contracted.

Please note this value cannot exceed 75% of your overall turnover.

Managing Compliance

Please specify, by selecting from the dropdown, to what extent you would sub-contract this category of work

Select...

- Never sub-contract this work
- Always sub-contract this work
- Sometimes sub-contract this work

Lastly you can view requirements for that work category. This will only be available if you are required to have licence in the category of work you have selected. To add/remove your licence, please select **“Edit”**.

The following requirements need to be met for this category.

Requirement	Status	Standard	Issues / Advisory	Expiry Date	Verified On	Affecting
Building Services requirements	Not Verified	Work Categories / Trades				SHOW (7) EDIT

Once you select **“Edit”**, there will be options to add your licence or accreditation with **“Add New”**.

Building Services requirements
Status: Not verified • Expiry date: • Last Submission date: • Verifier:

3 Missing answers

Licence and Accreditations

Name of Licence	Expiry date
No results	

ADD NEW

Missing answer REF: 1293

You will be able to select your licence, provide licence number and the start and end date matching with the certificate or evidence you provide.

Licence and Accreditations

Select the name of the Licence/Accreditation you are providing from the list below

Select...

Licence number

Licence number

Start Date

DD/MM/YYYY

Expiry Date

DD/MM/YYYY

Please upload your certificate

Document Name	Uploaded On
---------------	-------------

Click **UPLOAD DOCUMENT** to add a new document

UPLOAD DOCUMENT

Managing Compliance

After you have completed all questions, you can click the **“Save”** button at the top of the screen to save the information. If you have added a licence, you will also need to **“Submit”** this.

Buyer Connections - To view the details for compliance for Buyer Connections you have, you can select **“Show Details”** under the Level box.

Each connection will be listed here with the Buyer name, the name of the segment of their supply chain you are in, the type of segment and segment stage. To view details, select the downwards chevron next to that section.



This will show all requirements for the Buyer Connection. Click **“Edit”** to open any of the requirements.

The screenshot shows a table of requirements for a Buyer Connection. The table has columns for Requirement, Standard, Status, Issues/Advisory, Expiry date, Impacts, Verified on, and Submission. Two rows are visible: 'Primary Contact' with a 'Not Verified' status and 'Registered Office' with a 'Verified' status. Each row has an 'EDIT' link on the right.

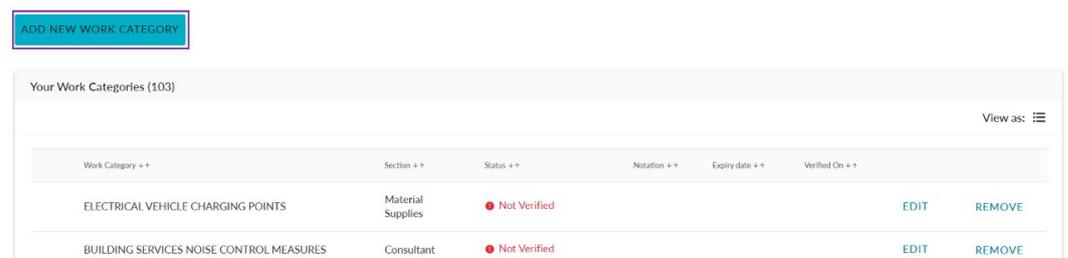
Requirement	Standard	Status	Issues/Advisory	Expiry date	Impacts	Verified on	Submission
Primary Contact	Identity	Not Verified		28/11/2023	SHOW (5)	28/11/2022	EDIT
Registered Office	Identity	Verified		25/01/2025	SHOW (5)	25/01/2024	EDIT

To complete the requirements for the Buyer Connection, follow the instructions above for the **Level Requirements**. These requirements may include the same questions found in your level requirements, or they may be customised requirements for the Buyer.

Work Categories

Here you see all Work Categories applied to your account, edit or remove these and add new ones.

To add a new work category, click **“Add New Work Category”**.



Each work category will fall under a type, for Constructionline, these are:

Managing Compliance

- Contractor
- Consultant
- Material Supplies
- RISQS

If you also hold Facilitiesline membership, you will see this type too:

- Facilities Management

Select the type of category using the buttons at the top.

Add Work Category

CANCEL

Browse work categories via sections:

- Constructionline CPV (Material Supplies) Constructionline CPV (Consultant) Constructionline CPV (Contractor)
 RISQS (RAIL INDUSTRY)

To view all categories in a section, select the downwards chevron next to that section. You can then click the box to add this category.

For example, under the **Contractor** type, you can see the **Building Finishes** section. Within that section, **Cleaning (Stone)** and **Glazing (Stained & Leaded Glass)** has been selected.

Add Work Category

CANCEL CONFIRM NEW CATEGORIES (2)

Browse work categories via sections:

- Constructionline CPV (Material Supplies) Constructionline CPV (Consultant) Constructionline CPV (Contractor)
 RISQS (RAIL INDUSTRY)

(3. Contractor) BUILDING FINISHES (2) ^

CONSERVATION (2) ^

CLEANING (STONE)
 GLAZING (STAINED & LEADED GLASS)
 INTERNAL FINISHES

List of new work categories

Constructionline CPV (Contractor):
(3. Contractor) BUILDING FINISHES:
CONSERVATION (2):
• GLAZING (STAINED & LEADED GLASS)
• CLEANING (STONE)

Click **“Confirm New Categories”** once you have selected all relevant work categories. This will take you back to the **Work Categories** tab.

Do not forget to click **“Edit”** next to your new categories and complete all requirements as shown in the instructions above.

Managing Compliance

Download Certificates

Once you have completed all requirements and are fully verified, you will be able to download your certificate. Click “**Download Certificates**” at the top of the **Manage Compliance** page.

DOWNLOAD CERTIFICATES

You will only be able to download your certificate if you are verified to that level.

Please note, membership level certificates, such as Gold, will have the date you accessed the certificate and no expiry date. This is because verification is dynamic, and there is no set expiry date.

Download Certificate

Certificate downloads are only available when status is verified

 ALL AVAILABLE CERTIFICATES (0)

 Platinum Not Verified	DOWNLOAD CERTIFICATE
 Gold Not Verified	DOWNLOAD CERTIFICATE
 Silver Not Verified	DOWNLOAD CERTIFICATE
 Bronze Not Verified	DOWNLOAD CERTIFICATE
 SSIP Acclaim Not Verified	DOWNLOAD CERTIFICATE
 SSIP DTS Not Verified	DOWNLOAD CERTIFICATE
 Social Value Not Verified	DOWNLOAD CERTIFICATE

CLOSE

Still feeling stuck?

You can contact us via:

Telephone: **0333 300 3066**

Email: **support@constructionline.co.uk**

Live Chat on the portal: 