

# Contracts Register Guide



Llywodraeth Cymru  
Welsh Government

[www.cymru.gov.uk](http://www.cymru.gov.uk)

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## Introduction

The Contracts Register module provides the facility for buying organisations to operate a private register of all contracts they have in place. This includes contracts let by themselves and also collaborative contracts they are eligible to purchase from, such as those maintained by National Procurement Service. The option to publish a public register of these contracts is also available.

Entries are automatically made to the contracts register every time an award notice is published through Sell2Wales. Buyers also have the option of manually adding entries and amending existing entries to keep their contracts up to date.

## 'Contracts Administrator' Access Level

The contracts register can be amended by users with 'Contracts Administrator' access level. Any user with Controller access can assign this level to another user by visiting the [Buyer Control Panel](#) > [User List](#), selecting the user they want to amend and ticking "Contracts Administrator" and then "Save".

**Change User Responsibilities**

The responsibility details for **Duncan Dallas** are detailed below. To change the details, tick the appropriate box(es) and *click* the **Save** button. To remove this person from your buying organisation, *click* the **Remove** button.

**Details**

**Name:** Duncan Dallas  
**Email:** duncan@millstream.eu

**Access**

- Buyer User
- Editor
- Publisher
- Controller
- OJEU Publisher
- Postbox Opener
- Reporter
- Quick Quote Publisher
- Quick Quote Editor
- Contracts Administrator

**Save** **Remove** **Cancel**



## 'Administrators for the contract' status

Only 'Contract Administrators' have global authority to make changes to any of your organisation's contracts, however the 'Contract Administrator' can allocate 'Administrators for this contract' status to individual users for specific contracts. This gives the user the same amendment controls as the Contract Administrator but only for that contract.

To allocate this Contract Administrator status to a specific contract, from the **View Contract** page select the 'Admin/Notify' tab:

### View Contract

You are here: [Home](#) > [Contract Register Control Panel](#) > [Public Contracts Register](#) > View Contract

The screenshot shows a web interface with a navigation bar at the top containing tabs: Details, Translation, Finance, Successful Suppliers, Collaborating Buyers, Notes, Documents, and Admin/Notify. The 'Admin/Notify' tab is highlighted with a red rectangular box. Below the navigation bar, the page title is 'Contract Details'. The main content area displays the following contract information:

- ID: 84016
- Status: Published
- Title: Office Equipment
- Contract Type: SUPPLIES
- Procedure Type: Open
- Contract Award Notice Ref: [NOV260043](#)
- Internal Ref: Portal Ref: 84016



The 'Administrators for this contract' section will display any users that may already been given 'Administrators for this contract' status.

To give a user this status select a user from the 'Add a new administrator' drop down list and select the **Add** button.

### View Contract

You are here: [Home](#) > [Contract Register Control Panel](#) > [Public Contracts Register](#) > View Contract

Details	Translation	Finance	Successful Suppliers	Collaborating Buyers	Notes	Documents	Admin/Notify
<b>Administrators for this contract</b> Select the users from your organisation who will be permitted to amend, add notes and add documents to this contracts register entry.		<b>Notifications for this contract</b> Select the users from your organisation who will receive a contract renewal reminder e-mail. Note: The date of this e-mail can be set in the "details" tab.					
<p>Add a new administrator</p> <p>Select a user... <input type="button" value="Add"/></p>		<p>Add a new notification recipient</p> <p>Select a user... <input type="button" value="Add"/></p>					
<p>No administrators have been assigned to this contract.</p>		<p>No notification addresses have been assigned to this contract.</p>					

You can repeat this process to give additional users this status.



## Accessing and Understanding the Private Contracts Register

To access your organisation's Contracts Register visit the [Buyer Control Panel](#) and select 'Contracts Register' under Organisation.

### Buyer Control Panel

Welcome to your Buyer Control Panel Claire. Please *click* a link in one of the appropriate sections to access the area of the site you require.

 NOTICES	 ORGANISATION	 SUPPLIER SEARCH	 HELP & RESOURCES
<ul style="list-style-type: none"><li>Create New Notice</li><li>My Unpublished Notices</li><li>Buyer Unpublished Notices</li><li>My Published Notices</li><li>Buyer Published Notices</li><li>Quick Quotes</li><li>Stage 2 Notices</li><li>ESPD</li></ul>	<p>Millstream Associates Ltd (AA16166) - <a href="#">Change your Organisation</a></p> <ul style="list-style-type: none"><li>Buyer Profile</li><li>User List</li><li>Document Library</li><li>Agents</li><li>Reports</li><li><b>Contract Register</b></li></ul>	<ul style="list-style-type: none"><li>Supplier Finder</li><li>Search by Details</li><li>Search by Category</li></ul>	<ul style="list-style-type: none"><li>NPS Contracts, Framework &amp; Guidance</li><li>eProcurement Tools</li><li>User Guides</li><li>FAQs</li><li>Contact Us</li><li>Site Mailer</li><li>eCertis</li></ul>

This will direct you to your Contracts Register Control Panel from where you can manage your register entries.

### Contract Register - Control Panel

Your Public Contracts Register is currently On.

You can change this setting on the [Amend Buyer Details](#) page.

#### Completed Contracts

- [View Public Contracts](#)
- [View Expired Contracts](#)
- [View Hidden Contracts](#)
- [Download All Current Contracts \(public and hidden\)](#)
- [Manage Purchasing Teams](#)
- [User Guides](#)

#### New / Incomplete Contracts

- [View Incomplete Contracts](#)
- [Create New Contract](#)
- [Create a Call Off](#)



On the control panel you will see the following information:

### Your Public Contracts Register is On/Off

This displays whether your organisation's public contracts register is visible to the general public or not. A Controller for your organisation can change this option by amending the setting on the [Amend Buyer Details](#) page.

#### Amend Buyer Details

The details of your organisation are shown below. Amend the details you wish to change then *click* the Save button to continue.

**Note:** Telephone / Fax number must be in the international notation Eg: +44 140633900 or +44 222020-43657 (ext).

\* Required information.

<b>Organisation</b>	
* Name:	Millstream Associates Ltd
<b>Organisation Details</b>	
* Address 1:	Queens Road
Address 2:	
Town/City:	Aberdeen
Postal Code:	AB15 4ZT
Country:	United Kingdom (GB) ▼
* Phone:	+44 1224650000
Fax:	
Website:	http://www.sell2wales.gov.uk
General Email Address:	help@sell2wales.gov.uk
Reference no:	not sure
Buyer Type:	Body Governed by Public Law ▼
<b>NUTS Code</b>	
Please select the appropriate NUTS location.	
* Location:	UKM50 - Aberdeen City an ▼
<b>Account Information</b>	
Contact:	Account Manager
Department:	Accounts
Address 1:	Administration Building,
Address 2:	
Town/City:	Aberdeen
Postal Code:	AB392xy
Country:	United Kingdom (GB) ▼
<b>Public Contracts Register</b>	
You can choose to hide all of your contracts in the Contract Register (regardless of their visibility) by turning your Public Contracts Register off.	
<input checked="" type="radio"/> On <input type="radio"/> Off	



## Completed Contracts

The Completed Contracts section allows you to manage all the completed entries in your contracts register as follows:

*View Public Contracts* – This provides access to all the current contracts that are shown on your public register. If your public contracts register is switched off, these will only become visible when made your public contracts register is switched on.

*View Expired Contracts* – This provides access to all your organisation's contracts that have passed their end date.

*View Hidden Contracts* – Buyers have the option to hide contracts from the public contracts register for various specified reasons. This provides access to those hidden contracts. If you do not intend to publish your public register there is no reason to hide contracts.

*Download All Current Contracts* – a quick link to download all your organisation's current contracts whether they are marked as public or hidden.

## New/Incomplete Contracts

This facility allows for the manual entry of contracts into the register where an award notice has not been published.

Note: This option is only displayed to those users with the Contracts Administrator access level.

The sections in this panel are:

*View Incomplete Contracts* – This provides access to any manual entries that have been created but not yet published.

*Create a New Contract* – This can be used to create a new contracts register entry where an award notice has not been published/is not required.

*Create a Call Off* – This can be used to create a new contracts register entry for a call off under an existing framework agreement.



## Populating the Contracts Register via Award Notices

When an award notice is published on Sell2Wales by your organisation an entry is automatically made in your contracts register. The way in which it is published on the register is determined by the type of notice published. All award notices are accessed through the award creation functions of Sell2Wales.

If an OJEU or website level award notice is published the register entry is automatically added to your public contracts register.

## Populating the Contracts Register via a manual entry

If you have a contract in place that does not have a related award notice, you have the option to add these manually to your contracts register via the Contracts Register Control Panel .

If you want to record a regular contract that is not a call off from a framework agreement select “Create New Contract”.

### Contract Register - Control Panel

Your **Public Contracts Register** is currently **On**.

You can change this setting on the **Amend Buyer Details** page.

#### Completed Contracts

- [View Public Contracts](#)
- [View Expired Contracts](#)
- [View Hidden Contracts](#)
- [Download All Current Contracts \(public and hidden\)](#)
- [Manage Purchasing Teams](#)
- [User Guides](#)

#### New / Incomplete Contracts

- [View Incomplete Contracts](#)
- [Create New Contract](#)
- [Create a Call Off](#)



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You must then complete all the details of the contract register entry, including entry of the successful suppliers before choosing “submit”.

If you want to record a call off from a framework agreement select “Create a call off”. You must then complete all the details of the contracts register entry, including the framework to which the call off belongs.

### Contract Register - Control Panel

Your **Public Contracts Register** is currently **On**.

You can change this setting on the **Amend Buyer Details** page.

#### Completed Contracts

- [View Public Contracts](#)
- [View Expired Contracts](#)
- [View Hidden Contracts](#)
- [Download All Current Contracts \(public and hidden\)](#)
- [Manage Purchasing Teams](#)
- [User Guides](#)

#### New / Incomplete Contracts

- [View Incomplete Contracts](#)
- [Create New Contract](#)
- [Create a Call Off](#)



## Amending your contracts register entries

Any user with Contract Administrator access can amend any contract register entry which belongs to their buying organisation. All changes made are updated in real time and reflected immediately on the private and public contracts register.

### Contract Details

The basic details of the contract can be amended if required. To do so select the title of the contract register entry:

								Download Options
Award Ref	Contract Title	Start Date	End Date	Extended End Date	Extensions Available (months)	Framework	Call Off	
NOV260037	<a href="#">IT Equipment</a>	08/05/2019	08/10/2019	08/11/2019	4	No	No	
OCT260017	<a href="#">Audit Services</a>	15/01/2019	15/02/2019	-	1	No	No	
OCT260018	<a href="#">Insurance services</a>	15/01/2019	15/02/2019	-	1	No	No	
NOV260043	<a href="#">Office Equipment</a>	15/01/2019	15/02/2019	-	1	No	No	
NOV260044	<a href="#">Testing Services</a>	15/01/2019	15/02/2019	-	6	No	No	

Then select “Edit” at the bottom of the Details tab.



## View Contract

You are here: [Home](#) > [Contract Register Control Panel](#) > [Public Contracts Register](#) > View Contract

Details	Translation	Finance	Successful Suppliers	Collaborating Buyers	Notes	Documents	Admin/Notify
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### Contract Details

ID: 84016  
Status: Published  
Title: Office Equipment  
Contract Type: SUPPLIES  
Procedure Type: Open  
Contract Award Notice Ref: [NOV260043](#)  
Internal Ref: Portal Ref: 84016  
Contract Category: C - Local contract let on behalf of one buyer  
Buyer: Millstream Associates Ltd (AA16166)  
Primary CPV Code: N/a  
Additional CPV Code(s):  
Is Framework: No  
Options:  Collaborative Contract  
Description: test  
Visible on public register: Yes  
Term Contract: No  
Email reminder for contract renewal sent: No  
Purchasing Team: N/a

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### Contract Dates

Create Date: 21/11/2018  
Date Awarded: 01/10/2018  
Start Date: 15/01/2019  
End Date: 15/02/2019

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### Contract Extensions

Contract Extension: [Extend This Contract](#)  
Early Termination: [Terminate This Contract](#)

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### Additional Information

Additional Information:

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### Contact Details

Contact Name: Claire  
Email: [claire@thecouncil.gov.uk](mailto:claire@thecouncil.gov.uk)

[Edit](#)



This will open up certain fields of the contract which can be amended as required. Once you have updated the relevant fields select "Update" at the bottom of the tab.

**View Contract**

You are here: [Home](#) > [Contract Register Control Panel](#) > [Public Contracts Register](#) > View Contract

Details Edit Translation Finance Successful Suppliers Collaborating Buyers Notes Documents Admin/Notify

### Contract Details

**Required information**

- Contract title:
- Contract Award Notice Ref:
- Internal Ref:
- Contract type:
- Procedure type:
- Contract Category:
- Contract award date: 01/10/2018
- Contract start date:
- Contract end date (excluding extensions):
- Maximum extension period:  months
- Contact Name:
- Contact Email:
- Term Contract:
- Email reminder date for contract renewal:

Note: Select a purchasing team from the list. Alternatively select 'Add new purchasing team' to enter the name of the new purchasing team. When you update the contract the new team will be added to this contract and will also be added to the purchasing team list.

Purchasing Team:  [Add new purchasing team](#)

Visible on public register:

Is this a reserved contract?  
 Yes  No

Collaborative contract?  
 Yes  No

Is Electronic Auction?  
 Yes  No

Is this conclusion of a framework agreement?  
 Yes  No

Short Contract Description

CPV Coding

[Add](#) [Delete](#)

**Additional Information**

Additional Information:

[Update](#) [Cancel](#)



## Providing a translation of the Contract Register Entry

You can provide a translation of the contract's title and description. This will mean that users viewing the entry on the other language version of Sell2Wales will see the translated title and description. To do so select the "Translation" tab and follow the procedure to edit.

### View Contract

You are here: [Home](#) > [Contract Register Control Panel](#) > [Public Contracts Register](#) > View Contract

Details Edit	Translation	Finance	Successful Suppliers	Collaborating Buyers	Notes	Documents	Admin/Notify
--------------	-------------	---------	----------------------	----------------------	-------	-----------	--------------

**Contract Details**

Title: Office Equipment

Description: Office Equipment

[Edit](#)



## Hiding a contract

If the purpose of amending your contract is to hide it from your public register then deselect the “Visible on Public Register” option.

Details Edit Translation Finance Successful Suppliers Collaborating Buyers Notes Docum

### Contract Details

\* Required information

\* Contract title: Office Equipment

Contract Award Notice Ref: NOV260043

Internal Ref: Portal Ref: 84016

\* Contract type: Supplies

\* Procedure type: Open

Contract Category: C - Local contract let on behalf of one buyer.

\* Contract award date: 01/10/2018

\* Contract start date: 15/01/2019 15/01/2019

\* Contract end date (excluding extensions): 15/02/2019 15/02/2019

\* Maximum extension period: 1 months

\* Contact Name: Claire

\* Contact Email: claire@thecouncil.gov.uk

Term Contract:

Email reminder date for contract renewal:

Note: Select a purchasing team from the list. Alternatively select 'Add new purchasing team' to enter the name of the new purchasing team. update the contract the new team will be added to this contract and will also be added to the purchasing team list.

Purchasing Team: N/a [Add new purchasing team](#)

**Visible on public register:**

Is this a reserved contract?

If you want to display the contract on the public register in the future visit the ‘Hidden Contracts’ link in your Contracts Register Control Panel, select the “Visible on Public Register” option and select “Update” at the bottom of the tab.



## Dividing a Contract into Lots

If a contract is divided into lots you can communicate this by selecting the “Successful Suppliers Edit” tab and on the “Lots” tab adding the Title, Lot Number, Offers received and selecting “Add”.

The screenshot shows the 'Successful Suppliers' interface. At the top, there are several tabs: 'Details', 'Translation', 'Finance', 'Successful Suppliers' (highlighted with a red box), 'Collaborating Buyers', 'Notes', 'Documents', and 'Admin/Notify'. Below the tabs, the 'Successful Suppliers' section is active. It contains a sub-tab 'LOTS' (highlighted with a red box) and a 'Suppliers' tab. A green notification bar indicates 'Lot Updated'. Below this, there is a text instruction: 'If the contract is divided into lots please enter details of the lot and click 'Add'. Perform this action once for each lot. After adding lots you can still edit or delete them. If the contract is not divided into lots proceed to the Suppliers section.' A table lists existing lots:

Title	Lot Number	Offers	Suppliers	Action
Lot 1 - Chairs	1	5	0	<a href="#">View / Edit</a>
Lot 2 - Tables	2	8	0	<a href="#">View / Edit</a>

Below the table is the 'Add Lot' form. It includes the following fields:

- \* Title:
- \* Lot Number:
- \* Offers received:

An 'Add' button (highlighted with a red box) is located at the bottom right of the form.

This allows you to divide all the winning suppliers into their relevant lots for a clearer understanding of the contract.



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Once created, the details of each lot can also be amended by selecting “View/Edit” in the Action column of the lots table.

### **Editing Supplier details**

You can amend supplier details by selecting the “Successful Suppliers” tab then the “Suppliers” tab and selecting “View/Edit” in the Action column of the suppliers table.



Details Translation Finance **Successful Suppliers** Collaborating Buyers Notes Documents Admin/Notify

### Successful Suppliers

Below is a list of all successful suppliers for this contract. You can add additional suppliers to this contract by using the search tool below. Suppliers can also be selected for specific LOTS (if applicable) and may also have one or more subcontractors which can be added via the Subcontractors tab.

LOTS **Suppliers**

Below are the details of the successful suppliers for this contract. To view or edit supplier details or to assign them to a lot use the **view / edit** link.

Lot Number	Name	Town	Post Code	DUNS Number	Value	Action
	A company	Aberdeen	AB15 4ZT	501461867	£100.00	<a href="#">View / Edit</a>
1	A business	Aberdeen	AB10 4ZT	345903454	£100.00	<a href="#">View / Edit</a>

### Update Supplier

#### Business Details

\* Name:

\* Award Value:

DUNS number:

- Lots:
- 1 - Lot 1 - Chairs
  - 2 - Lot 2 - Tables
  - 3 - Lot 3 - Telephones

#### Contact Details

\* Address 1:

Address 2:

Town:

\* Post Code:

Country:

Phone:

[Update](#) [Delete](#) [Cancel](#)



The fields that can be amended are name, address, phone number, DUNS number, Award Value (the value of award made to this individual supplier) and the lot(s) on which the supplier has been successful.

Once you have updated the details you must select “Update” to save the changes.

Details Translation Finance **Successful Suppliers** Collaborating Buyers Notes Documents Admin/Notify

### Successful Suppliers

Below is a list of all successful suppliers for this contract. You can add additional suppliers to this contract by using the search tool below. Suppliers can also be selected for specific LOTS (if applicable) and may also have one or more subcontractors which can be added via the Subcontractors tab.

LOTS **Suppliers**

Below are the details of the successful suppliers for this contract. To view or edit supplier details or to assign them to a lot use the [view / edit](#) link.

Lot Number	Name	Town	Post Code	DUNS Number	Value	Action
	A company	Aberdeen	AB15 4ZT	501461867	£100.00	<a href="#">View / Edit</a>
1	A business	Aberdeen	AB10 4ZT	345903454	£100.00	<a href="#">View / Edit</a>

### Update Supplier

<b>Business Details</b>	<b>Contact Details</b>
* Name: <input type="text" value="A company"/>	* Address 1: <input type="text" value="10 Queens Road"/>
* Award Value: <input type="text" value="100"/>	Address 2: <input type="text"/>
DUNS number: <input type="text" value="501461867"/>	Town: <input type="text" value="Aberdeen"/>
Lots: <input type="checkbox"/> 1 - Lot 1 - Chairs <input type="checkbox"/> 2 - Lot 2 - Tables <input type="checkbox"/> 3 - Lot 3 - Telephones	* Post Code: <input type="text" value="AB15 4ZT"/>
	Country: <input type="text" value="United Kingdom (GB)"/>
	Phone: <input type="text"/>



## Removing a supplier

To remove a supplier from the contract you follow the same steps as if you were editing supplier details but select 'Delete' instead of 'Update'. An audit entry will be made in the Notes panel against that contract.

## Adding a supplier

To add a supplier to the contract they must be registered on Sell2Wales. To find their registration you can search by entering the company name, postcode, DUNS number or any combination of the three and selecting "Search". Search results will be listed with the option to "Add" that supplier to the contract.

Details Translation Finance Successful Suppliers Collaborating Buyers Notes Documents Admin/Notify

### Successful Suppliers

Below is a list of all successful suppliers for this contract. You can add additional suppliers to this contract by using the search tool below. Suppliers can also be selected for specific LOTS (if applicable) and may also have one or more subcontractors which can be added via the Subcontractors tab.

LOTS Suppliers

Below are the details of the successful suppliers for this contract. To view or edit supplier details or to assign them to a lot use the [view / edit](#) link.

Lot Number	Name	Town	Post Code	DUNS Number	Value	Action
1	A business	Aberdeen	AB10 4ZT	345903454	£100.00	<a href="#">View / Edit</a>
1, 2	A company	Aberdeen	AB15 4ZT	501461867	£100.00	<a href="#">View / Edit</a>

### Supplier Search

Use the supplier search tool below to find suppliers to add to your contract. Note: in order for suppliers to be added to the contract they must be registered users on the website.

Supplier Name:  Postcode: e.g EH4  DUNS Number:

Below is a list of all the suppliers that match your search criteria. Select the suppliers you wish to add then *click* the **Add** button.

75 records found. Jump to page  of 2

Supplier Name	Action
<b>Millstream</b> Anonymised for GDPR Anonymised for GDPR - Anonymised@GDPR.com	<input type="button" value="Add"/>
<b>Millstream</b> Anonymised for GDPR Anonymised for GDPR - Anonymised@GDPR.com	<input type="button" value="Add"/>



You can edit the supplier details once they have been added to the contract to provide information on value and lots if applicable.

## Extending a contract

If contract extensions apply to the contract you can invoke them by selecting “Extend this contract” under 'Contract Extensions' in the 'Details' tab.

### Contract Extensions

Contract Extension: [Extend This Contract](#)  
Early Termination: [Terminate This Contract](#)

The remaining extensions available on the contract will be shown and you must enter the number of months that you are extending the contract by. If multiple suppliers are on the contract and you are not extending it for them all, you can deselect suppliers by deselecting the box in the “Extend” column before selecting “Update”.

### Contract Extension

You are here: [Home](#) > [Contract Register Control Panel](#) > [Contracts Register](#) > [View Contract](#) > Contract Extension

Please enter the number of months that the contract should be extended by and *click* the **Update** button. Please note that the contract cannot be extended past the maximum number of months stated.

**Note:** All suppliers selected below will be included in the extension. Suppliers de-selected will be removed from this contract.

End Date: 15/02/2019  
Maximum Extension: 1 (months)  
Extend By:  Months

Supplier No	Lot Number	Name	Town	Post Code	DUNS Number	Value	Extend
2	1	A business	Aberdeen	AB10 4ZT	345903454	£100.00	<input checked="" type="checkbox"/>
1	1, 2	A company	Aberdeen	AB15 4ZT	501461867	£100.00	<input checked="" type="checkbox"/>



The end date of the contract will be updated and the extensions remaining will be deducted by the number of months the contract has been extended by.

### Contract Extensions

Maximum Extension: 5 (months)  
Extensions Remaining: 4 (months)  
Extended Contract End Date: 08/11/2019  
Contract Extension: [Extend This Contract](#)  
Early Termination: [Terminate This Contract](#)

### Terminating a contract

A contract can be terminated at any point before the end date. To terminate a contract, select “Terminate this contract” under 'Contract Extensions' in the 'Details' tab.

### Contract Extensions

Contract Extension: [Extend This Contract](#)  
Early Termination: [Terminate This Contract](#)

You must then enter a reason for the contract's termination before selecting “Save”. The reason given is added to the notes panel of the private contracts register entry only.



## Contract Termination

You are here: [Home](#) > [Contract Register Control Panel](#) > [Contracts Register](#) > [View Contract](#) > Contract Termination

Please enter your reason for terminating this contract and *click* the **Save** button.

**Note:** Individual suppliers can be removed from this contract by deleting them using the supplier tab on the 'View Contract' page.

**\* Reason for termination:**

Due to environmental concerns the project has been suspended for a significant period with no prospect of it being recommenced.

The end date will automatically be updated with today's date and the contract will move into the expired contracts list with the updated status "Terminated".



## View Contract

You are here: [Home](#) > [Contract Register Control Panel](#) > [Public Contracts Register](#) > View Contract

Details	Translation	Finance	Successful Suppliers	Collaborating Buyers	Notes	Doc
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### Contract Details

ID: 84007

Status: **Terminated**

Title: IT Equipment

Contract Type: SUPPLIES

Procedure Type: Open

Contract Award Notice Ref: **NOV260037**

Internal Ref: Portal ref: 84007

## Assigning a Purchasing Team

An individual contract can be assigned to a purchasing team. You can create purchasing teams through the “Manage Purchasing Teams” link in your Contract Register Control Panel.



## Contract Register - Control Panel

Your Public Contracts Register is currently On.

You can change this setting on the [Amend Buyer Details](#) page.

### Completed Contracts

- [View Public Contracts](#)
- [View Expired Contracts](#)
- [View Hidden Contracts](#)
- [Download All Current Contracts \(public and hidden\)](#)
- [Manage Purchasing Teams](#)
- [User Guides](#)

### New / Incomplete Contracts

- [View Incomplete Contracts](#)
- [Create New Contract](#)
- [Create a Call Off](#)

Once purchasing teams have been created you can assign contracts to them by editing each contract register entry.

Note: Select a purchasing team from the list. Alternatively select 'Add new purchasing team' to enter the name of the new purchasing team. When you update the contract the new team will be added to this contract and will also be added to the purchasing team list.

Purchasing Team:  [Add new purchasing team](#)

## Contract Management Tools

Contract management tools are provided to assist buying organisations with internal communications relating to contracts.

### Setting up contract renewal reminder emails

If a contract is a recurrent procurement which is likely to be re-tendered you can set an e-mail reminder to be sent to select users in your buying organisation. Only 'Contract Administrators' and users with 'Administrators for this contract' status are able set reminder date and select the users that should receive the



reminder email.

To choose a user that you wish to receive the reminder email, open the 'Admin/Notify' tab and in the 'Notifications for this contract' section select a user from the drop down list and select **Add**

### View Contract

You are here: [Home](#) > [Contract Register Control Panel](#) > [Public Contracts Register](#) > View Contract

Details Edit	Translation	Finance	Successful Suppliers	Collaborating Buyers	Notes	Documents	Admin/Notify
--------------	-------------	---------	----------------------	----------------------	-------	-----------	--------------

#### Administrators for this contract

Select the users from your organisation who will be permitted to amend, add notes and add documents to this contracts register entry.

Add a new administrator

Select a user... **Add**

No administrators have been assigned to this contract.

#### Notifications for this contract

Select the users from your organisation who will receive a contract renewal reminder e-mail. Note: The date of this e-mail can be set in the "details" tab.

Add a new notification recipient

Select a user... **Add**

No notification addresses have been assigned to this contract.

You can repeat this process to enable additional users to receive the reminder email.

To set the date you want the reminder email to be sent, In the 'Details Edit' tab for the contract, select **Term Contract** and the choose an email reminder date. (NOTE: If you don't select **Term Contract** first the reminder date will not be accepted)



## View Contract

You are here: [Home](#) > [Contract Register Control Panel](#) > [Public Contracts Register](#) > View Contract

Details Edit	Translation	Finance	Successful Suppliers	Collaborating Buyers	Notes	Documents	Admin/Notify
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### Contract Details

\* Required information

\* Contract title: Insurance services

Contract Award Notice Ref: OCT260018

Internal Ref: Portal Ref: 83975

\* Contract type: Supplies

\* Procedure type: Open

Contract Category: C - Local contract let on behalf of one buyer.

\* Contract award date: 01/10/2018

\* Contract start date: 15/01/2019 15/01/2019

\* Contract end date (excluding extensions): 15/02/2019 15/02/2019

\* Maximum extension period: 1 months

\* Contact Name: Claire

\* Contact Email: claire@thecouncil.gov.uk

Term Contract:

Email reminder date for contract renewal: 25/01/2019



An automated e-mail will be sent to the contract e-mail address on this date. Further reminders can be set up by amending the 'email reminder date for contract renewal' which can be done after the current date selected has passed.

## Contract Notes panel

A Notes tab is provided against all contracts. The notes tab is only visible in the private contracts register area, i.e. it is not shown to suppliers or the general public. Only Contract Administrators of the buying organisation who own the contract are able to add to the notes panel. Amendments to the contract are automatically added to the notes panel for audit purposes. To add a manual note select the Notes tab, enter text and then select 'Add'.

### View Contract

You are here: [Home](#) > [Contract Register Control Panel](#) > [Public Contracts Register](#) > View Contract

Details	Translation	Finance	Successful Suppliers	Collaborating Buyers	Notes	Documents	Admin/Notify
<b>Note:</b>							
<div style="border: 1px solid #ccc; height: 40px;"></div>							
(maximum 4000 characters, you have 4000 left) <b>Add</b>							
Created	Who	Note					
27/11/2018	Claire Murray	CONTRACT EXTENDED: Extended by 1 months from 15/02/2019 to 15/03/2019					



## Contract Documents panel

A documents tab is provided against all contracts for the upload of contract documentation and guidance. The documents are only visible in the private contracts register area and can only be seen by members of the contract owner organisation and any organisation who is collaborating on the contract. Only Contract Administrators of the buying organisation who own the contract are able to add or remove documents.

Documents can be submitted for both languages and are displayed on the basis of the language version of the website being used. You must choose the language of the document you are uploading to determine whether it appears in the “current documents” tab or the “current translated documents” tab.

To add a document to the contract:

1. Enter a description of the file in the ‘Description’ field. This should be a maximum of 100 characters.
2. Select the language of the document.
3. Select “Browse” next to the File Name box.
3. This will open up a file browser which allows you to select the file you wish to upload from your own files. Select the file you want to upload and select “Open”
4. This will enter the file path of your selected document next to File Name. Select “Add” to upload the document.
5. A message will appear on the screen instructing that the document is being uploaded. Once successfully uploaded it will appear in the Current Documents list, or if created in the other language then the Current Translated Documents list.



## View Contract

You are here: [Home](#) > [Contract Register Control Panel](#) > [Public Contracts Register](#) > View Contract

Details	Translation	Finance	Successful Suppliers	Collaborating Buyers	Notes	Documents	Admin/Notify
---------	-------------	---------	----------------------	----------------------	-------	-----------	--------------

### Attached Document Summary

Individual File Size Limit: **100.00 MB**  
Total Available File Space: **100.00 MB**  
Documents Attached: **0**  
Used File Space: **0.00 bytes**  
Remaining File Space: **100.00 MB**

### Upload a Document

\* Description:   
(maximum 100 characters, you have **73** left)

\* Language:

\* File Name:

Current Documents | Current Translated Documents | Archived Documents | Archived Translated Documents

### Current Documents

	File Name	Description	Size
<input type="checkbox"/>	<a href="#">List of Suppliers Appendix 2 v4.0 September 2018.docx</a>	Price List	486.58 KB



If documents are superseded or no longer relevant you can archive them by ticking the box next to the relevant document and selecting the "Archive" button. This will move the document from 'Current Documents' to 'Archived Documents' or 'Archived Translated Documents'.

### View Contract

You are here: [Home](#) > [Contract Register Control Panel](#) > [Public Contracts Register](#) > View Contract

Details	Translation	Finance	Successful Suppliers	Collaborating Buyers	Notes	Documents
---------	-------------	---------	----------------------	----------------------	-------	-----------

#### Attached Document Summary

Individual File Size Limit: **100.00 MB**  
Total Available File Space: **100.00 MB**  
Documents Attached: **0**  
Used File Space: **0.00 bytes**  
Remaining File Space: **100.00 MB**

#### Upload a Document

\* Description:   
(maximum 100 characters, you have **100** left)

\* Language:

\* File Name:

Current Documents | Current Translated Documents | Archived Documents | Archived Translated Documents

#### Current Documents

	File Name	Description
<input checked="" type="checkbox"/>	<a href="#">List of Suppliers Appendix 2 v4.0 September 2018.docx</a>	Price List 486.!

For audit purposes documents cannot be deleted.



## Downloading your Contracts Register

You can download your contracts register into an Excel or CSV document. This can be done on the current contracts, hidden contracts and expired contracts lists. If you have used the search options to filter the list the download will only download those contracts displayed in the list.

To do this select “Download options” at the top of the contracts list.

### Search for Contracts

#### Category Search

#### Browse Categories

Category

#### Advanced Search

ID

Title

Description

Supplier Name

Include collaborative contracts this buying organisation is eligible to purchase from

39 records found. Jump to page  of 1

Award Ref	Contract Title	Start Date	End Date	Extended End Date	Extensions Available (months)	Framework	Call Off
OCT260017	<a href="#">Audit Services</a>	15/01/2019	15/02/2019	-	1	No	No
OCT260018	<a href="#">Insurance services</a>	15/01/2019	15/02/2019	-	1	No	No
NOV260043	<a href="#">Office Equipment</a>	15/01/2019	15/02/2019	15/03/2019	0	No	No
NOV260044	<a href="#">Testing Services</a>	15/01/2019	15/02/2019	-	6	No	No

The result query builder screen will follow. On this page it is possible to select the fields you wish to be displayed in the export by selecting or unselecting the tick boxes in both the default field and optional fields. You should then select either the “Download as excel” or “Download as CSV” at the bottom of the screen.



### Result Query Builder

[Close Download Options](#)

You may now download the results of your search in CSV or Excel format. Select from the options below, which fields you would like to include in your result export.

**Default Fields**

These fields are fixed and will appear on all exports.

<input checked="" type="checkbox"/> ID	<input checked="" type="checkbox"/> Internal Ref	<input checked="" type="checkbox"/> Title	<input checked="" type="checkbox"/> Type
<input checked="" type="checkbox"/> Tender Ref	<input checked="" type="checkbox"/> Category	<input checked="" type="checkbox"/> Authority Name	<input checked="" type="checkbox"/> Contact Person
<input checked="" type="checkbox"/> Contact Email	<input checked="" type="checkbox"/> CPV Code	<input checked="" type="checkbox"/> Award Date	<input checked="" type="checkbox"/> Start Date
<input checked="" type="checkbox"/> End Date	<input checked="" type="checkbox"/> Extended End Date	<input checked="" type="checkbox"/> Max Extension	<input checked="" type="checkbox"/> Framework
<input checked="" type="checkbox"/> Collaborating	<input checked="" type="checkbox"/> Term	<input checked="" type="checkbox"/> Is Call Off	<input checked="" type="checkbox"/> Value
<input checked="" type="checkbox"/> Highest Offer	<input checked="" type="checkbox"/> Lowest Offer	<input checked="" type="checkbox"/> Value Per Annum	<input checked="" type="checkbox"/> Max Framework Value
<input checked="" type="checkbox"/> Supplier Name	<input checked="" type="checkbox"/> Supplier Address 1	<input checked="" type="checkbox"/> Supplier Address 2	<input checked="" type="checkbox"/> Supplier Town
<input checked="" type="checkbox"/> Supplier Post Code	<input checked="" type="checkbox"/> Supplier Country	<input checked="" type="checkbox"/> Supplier Phone	<input checked="" type="checkbox"/> DUNS Number
<input checked="" type="checkbox"/> LOT Number			

**Optional Fields**

These fields are optional, so you can select which of these fields you would like to appear on your export. Please note that all contract records will be downloaded, not just those with details contained in the selected fields.

Select All

**Framework Details (Call offs)**

<input type="checkbox"/> Framework ID	<input type="checkbox"/> Framework Title	<input type="checkbox"/> Framework URL
---------------------------------------	--	--

[Download as Excel](#) [Download as CSV](#)

The file will include a separate line for each contract awarded to a supplier. This means that if a single contract has ten suppliers on it there will be ten entries listed in the file.

If you want to download a list of all current contracts irrespective of whether they are public or hidden you can do so by selecting 'Download all current contracts (public and hidden)' from your Contract Register Control Panel.



### Contract Register - Control Panel

Your Public Contracts Register is currently On.

You can change this setting on the [Amend Buyer Details](#) page.

#### Completed Contracts

- [View Public Contracts](#)
- [View Expired Contracts](#)
- [View Hidden Contracts](#)
- [Download All Current Contracts \(public and hidden\)](#)
- [Manage Purchasing Teams](#)
- [User Guides](#)

#### New / Incomplete Contracts

- [View Incomplete Contracts](#)
- [Create New Contract](#)
- [Create a Call Off](#)

## Call offs from Framework Agreements

If a contract is a call off from a framework agreement you are asked to choose which framework agreement it belongs to when it is created. This can either be a framework agreement that exists in Sell2Wales or alternatively you can add the title and a URL to an external framework agreement.



### Contract Details

\* Required information

Is this call off associated with a framework agreement in your contracts register? If so you can link the call off to the framework by finding the entry in your register by selecting 'find framework'. If the framework agreement is not in your contracts register you can enter details of the framework manually.

\* Please select:  Find Framework  Enter details manually

ID:

Title:

Description:

Supplier Name:

**Search**

Title	Owner	Start	End	Action
<a href="#">Gardening Services</a> <sup>□</sup>	Millstream Associates Ltd	19/11/2018	31/12/2018	<a href="#">Select</a>

Details

### Contract Details

\* Required information

Is this call off associated with a framework agreement in your contracts register? If so you can link the call off to the framework by finding the entry in your register by selecting 'find framework'. If the framework agreement is not in your contracts register you can enter details of the framework manually.

\* Please select:  Find Framework  Enter details manually

\* Framework title:

\* Framework url:  <sup>×</sup>



When a call off is submitted against an existing framework agreement in Sell2Wales it will be added to the original framework agreement entry under the 'Call Offs' tab.

## View Contract

You are here: [Home](#) > [Contract Register Control Panel](#) > [Public Contracts Register](#) > View Contract

ID	Buyer	Contract Title	Start Date	End Date
 84034	Millstream Associates Ltd	<a href="#">Gardening Services</a>	01/12/2018	31/01/2019

## Collaborative Contracts

If a contract is collaborative it can be displayed in multiple buying organisations' contracts registers.

Only the buyer who owns the contract has the facility to amend the contract or add notes or documents, but all users of an eligible buying organisation can view this information.

By default, only those contracts owned by the buying organisation are shown in the Contracts Register. To view other buying organisations' contract that you are eligible to purchase from select the tick box "Include **collaborative** contracts this buying organisation is eligible to purchase from" and search.



## Search for Contracts

### Category Search

Search for category

Go

### Browse Categories

Category

All



Go

### Advanced Search

ID

Title

Description

Supplier Name

Include collaborative contracts this buying organisation is eligible to purchase from

Search

### Adding a collaborative contract to your register

Only select users from the contract owner organisation can add collaborative buyers to a contract. If you cannot find a collaborative contract you believe should be in your register please contact the contract owner.

### Adding a buying organisation to your collaborative contract – Contract Award Notice

Within a contract award notice you will be asked if the contract is collaborative and, if so, which buying organisations are eligible to purchase from it. Selecting the eligible organisations in this question will add the resultant contract register entry to their contract register.





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### **Adding a buying organisation to your collaborative contract – Contract Register Entry**

If the eligible organisations have not been added at contract award stage a Contract Administrator can add them to the contract register entry. This is done by selecting the “collaborating buyers” tab on the contract register entry and choosing the relevant organisations from the list and then ‘Add’.

[www.cymru.gov.uk](http://www.cymru.gov.uk)



Details	Translation	Finance	Successful Suppliers	<b>Collaborating Buyers</b>	Notes	Documents	Admin/Notify
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### Collaborating buyers

Listed below are the buyers collaborating on this contract

External Ref	Buyer Name
No collaborating buyers to display.	

### Add additional buyers

Select the required buyers and click the Add button to update the list shown above.

**Add**

- Local Authority
- Health Sector NHS Wales
- Welsh Government - Core Depts
- Welsh Government - Agencies
- Welsh Government - NDPBs
- Welsh Government - Other
- Education - Higher Education
- Education - Primary Education
- Education - Further Education
- Public Funded Bodies
- National Parks
- Housing
- European Funded Organisations
- Community and Town Councils
- Charity and Public Funded Bodies
- UK Central Government
- Careers Wales
- Buyer Contractor
- Police
- Grant Funded Buyers
- Fire and Rescue Service
- Other
- Funding from Visit Wales
- Agent



## National Procurement Service (NPS) Contracts

The Contracts Register tool is used by NPS to share details of their collaborative framework agreements and contracts with those organisations eligible to use them.

NPS will add every eligible organisation to each contract so that the contract will appear in the relevant contract registers. To view these contracts that you are eligible to purchase from select the tick box “Include **collaborative** contracts this buying organisation is eligible to purchase from” and search.

NPS contract titles will be prepended with “NPS” so they are easier to identify. If you are unable to find an NPS contract in your register please contact NPS.

## Public Contracts Register

If you choose to switch your public contracts register on, all contracts in your public register will be visible to all visitors to Sell2Wales.

A new tab in your Buyers Profile will provide a link to your public contracts register.

### View Buyer Details

Details of the selected authority are shown below.

Organisation Details	Contact Details	Description	Purchase Plans	Other Info	Current Contract Notices	Future Contract Notices
Past Contract Notices	Contract Award Notices	<b>Contracts Register</b>	Qualification	Statistics	Documents	

View and search this buyer's contracts register.

**Contracts Register**



If you have not elected to make your contracts register public a message will be displayed in this tab which reads “This buyer has not activated their public contracts register. Please contact the organisation directly for further information.”

### View Buyer Details

Details of the selected authority are shown below.

Organisation Details	Contact Details	Description	Purchase Plans	Other Info	Current Contract Notices	Future Contract Notices
Past Contract Notices	Contract Award Notices	Contracts Register	Qualification	Statistics	Documents	

This buyer has not activated their public contracts register. Please contact the organisation directly for further information.

Selecting the contracts register link will show the user a list of all your public contracts, with the option to filter by category, ID, title description and supplier name. They also have the option to restrict the search to find term contracts only or expand the search to include expired contracts in the list of results.



### Search for Contracts

- Search for **Term** Contracts only  
(Contracts for which the requirements are likely to be recurrent and go out to tender at the end of the current agreement)
- Include **Expired** Contracts
- Include **collaborative** contracts this buying organisation is eligible to purchase from

#### Category Search

Search for category

#### Browse Categories

Category

#### Advanced Search

ID   
Title   
Description   
Supplier Name

39 records found. Jump to page  of 1



[Download as Excel](#) | [Download as CSV](#)

Award Ref	Contract Title	Start Date	End Date	Extended End Date	Extensions Available (months)	Framework	Call Off
OCT260017	<a href="#">Audit Services</a>	15/01/2019	15/02/2019	-	1	No	No
OCT260018	<a href="#">Insurance services</a>	15/01/2019	15/02/2019	-	1	No	No
NOV260043	<a href="#">Office Equipment</a>	15/01/2019	15/02/2019	15/03/2019	0	No	No
NOV260044	<a href="#">Testing Services</a>	15/01/2019	15/02/2019	-	6	No	No

Selecting a particular contract will display the contract details, successful supplier details, collaborating buyer details and, if a framework contract, a list of all the call offs made.



## View Contract

You are here: [Home](#) > [Public Contracts Register](#) > View Contract

[Details](#) [Successful Suppliers](#) [Collaborating Buyers](#)

### Contract Details

ID: 84016  
Title: Office Equipment  
Contract Type: SUPPLIES  
Procedure Type: Open  
Contract Award Notice Ref: [NOV260043](#)  
Internal Ref: Portal Ref: 84016  
Contract Category: C - Local contract let on behalf of one buyer  
Buyer: Millstream Associates Ltd (AA16166)  
Primary CPV Code: N/a  
Additional CPV Code(s):  
Is Framework: No  
Options:  Collaborative Contract  
Description: Office Equipment  
Purchasing Team: N/a

### Contract Dates

Date Awarded: 01/10/2018  
Start Date: 15/01/2019  
End Date: 15/02/2019

### Contract Extensions

Extended Contract End Date: 15/03/2019  
Max Extension Options Available: 0 (months)

### Additional Information

Additional Information:

### Contact Details

Contact Name: Claire  
Email: [claire@thecouncil.gov.uk](mailto:claire@thecouncil.gov.uk)



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The below items will not be made available on the public register:

- Contract notes
- Contract documents
- Contract Administration Panel

### **Further information**

If you have any queries regarding the Contracts Register tool please contact the Sell2Wales helpdesk on 0800 222 9004 or [help@sell2wales.gov.wales](mailto:help@sell2wales.gov.wales)



## **ANNEX A - Understanding the contracts register fields**

### **DETAILS**

**ID:** The S2W ID of the contract register entry. In the case where the entry has been created from the publication of an award notice this is the document ID of the contract award notice. If the entry has been created manually the ID is assigned to the contract register entry on publication.

**Contract title:** The descriptive title of the contract. If the register entry is automatically created from an award notice this will be the title of that notice. If it is created from a manual entry the buyer can choose the title.

**Contract type:** The type of contract in terms of whether it is for works, services or supplies

**Contract Award Notice Ref:** The reference of the contract award notice, if applicable.

**Internal Ref:** The reference given to the contract by the buying organisation.

**Contract Category:** The classification of the contract in terms of being local, national or sectoral according to the below:

Category A - a national collaborative contract

Category B - a sectoral collaborative contract

Category C1 - a regional or local collaborative contract let on behalf of more than one buyer

Category C - a local contract let on behalf of one buyer only

Category CO - a call off from a framework

**Buyer:** The buying organisation who owns the contract.

**Primary CPV code:** The first CPV code provided for the contract.

**Additional CPV codes:** Any supplementary CPV codes provided.

**Contract award date:** The date the contract was awarded.

**Contract start date:** The date the contract started.

**Contract end date (excluding extensions):** The date the contract is due to end, not including any extension options not yet activated.

**Maximum extension period (months):** The number of months that the contract can be extended for. Note, if extensions are activated this number will decrease by the number of months extended by.



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**Payment window (months):** The number of months after the official contract end date during which you would usually expect to have made all payments relating to the contract to the relevant supplier(s).

**Contract value or lowest offer / highest offer:** The value of the contract or, if not given, the lowest and the highest offer made.

**Contact Name:** The name of the buyer who is responsible for the contract.

**Contact Email:** The e-mail address of the buyer who is responsible for the contract.

**Term Contract:** Contracts for which the requirements are likely to be recurrent and go out to tender at the end of the current agreement.

**Email reminder date for contract renewal:** The date on which a reminder email will be sent to the contact email address reminding them that the contract is coming up for renewal.

**Visible on public register:** Whether the contracts register entry will be displayed on the public contracts register, if switched on.

**Collaborative contract?:** Whether the contract is collaborative with more than one buying organisation eligible to purchase from it.

**Is this conclusion of a framework agreement?:** Whether the award notice is setting up a framework agreement.

**Description:** The description of the contract. If the register entry is automatically created from an award notice, this will be taken from the description field within the notice. If it is created from a manual entry the buyer must enter the description.



### **LOT DETAILS**

If the contract is divided into lots details of each lot can be entered.

**Title:** The title of the lot.

**Lot Number:** The number of the lot.

**Offers received:** The offers received for that particular lot during the tender process.

### **SUCCESSFUL SUPPLIER DETAILS**

If the register entry is automatically created from an award notice the successful supplier details will be copied from the notice. If there are multiple suppliers on the contract each supplier should be entered.

**Name:** The company name of the supplier

**Address 1:** The company address of the winning supplier

**Address 2:** The company address of the winning supplier

**Town:** The company address of the winning supplier

**Post Code:** The company address of the winning supplier

**Country:** The company address of the winning supplier

**DUNS number:** The DUNS number of the winning supplier

**Award Value:** The value of the award made to this particular supplier

**Lot Number:** If applicable the lot number under which this supplier has won a contract. If a supplier has been awarded more than one lot they should appear multiple times, once for each lot they have been successful on.