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Introduction

This technical guide covers the steps needed to complete the required supplier onboarding via the new procurement system, Panacea Software.

You will need to fill in some required details once you've registered for your:

- Registration Questionnaire
- Company Details
- Bank Details

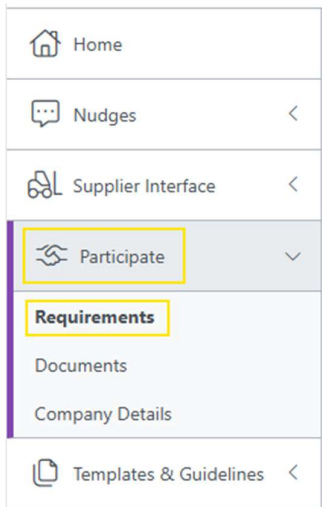
If you require any technical assistance when completing your registration steps, please contact Panacea Support at support@panacea-software.com . Please ensure you include that you're using the **Karbon Homes Panacea site** in your e-mail so the Panacea support team can know where you're enquiring from.

Note: When navigating your screen following the different steps below, you may sometimes see a  button in the upper right-hand side of your screen. Clicking on this will link relevant help articles if you require extra written guidance at all.

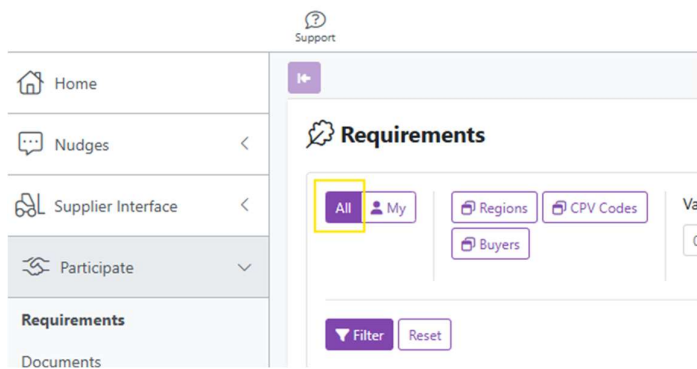
Registration Questionnaire

The Registration Questionnaire is important for you to complete in order to provide your documentation. The documents you upload within this questionnaire will be stored against your Organisation, and pulled through to any future tenders that require these documents.

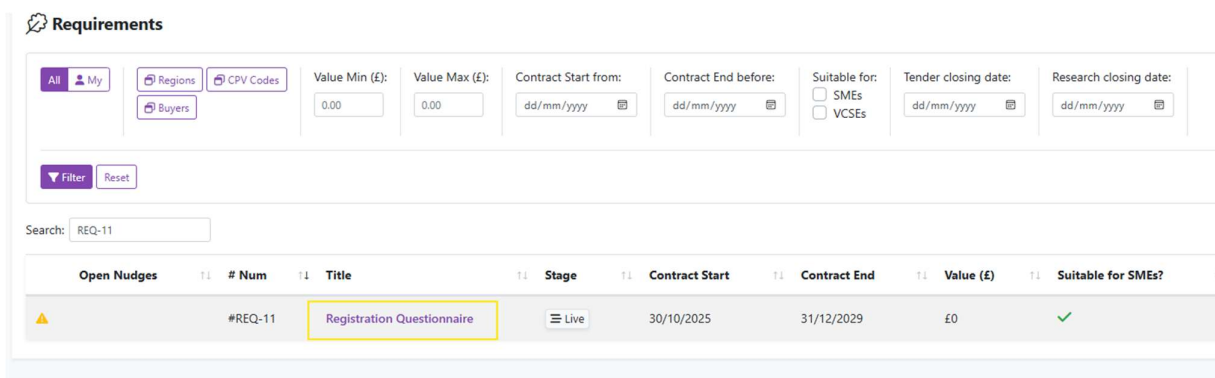
Using the left-hand side toolbar, click on **Participate > Requirements**.



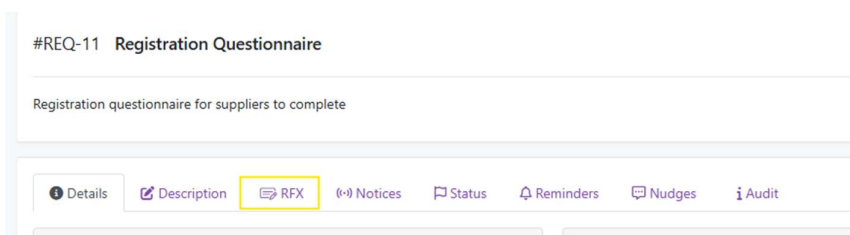
For the Registration Questionnaire to appear, you must ensure you've filtered to **All** here.



Click on the **Registration Questionnaire**.



Click on the **RFX** tab



Within this tab, you'll find the Registration Questionnaire. Next to it, click the **Participate** button.

Auction Details	Auction Date	Status	Reg Closing Date & Time	Response	Documents	Clarification Q&A	Progress	Action
N/A	N/A	ⓘ Awaiting Registration	31/12/2030 10:08	1	View	View	0/0	Submit Participate

Click on the **Respond** button that's now appeared.

Auction Details	Auction Date	Status	Reg Closing Date & Time	Response	Documents	Clarification Q&A	Progress	Action
N/A	N/A	ⓘ Response Not Started	31/12/2030 10:08	1	View	View	0/1	Respond Opt out Submit

This now opens up the questionnaire section. Click **Respond** to open up the questionnaire.

Registration Questionnaire

Section	Status	Action
Documents	Not Started	Respond

[← Return to Requirement](#) ⓘ Once all sections are Complete, please return to the Requirement and Submit your completed RFX questionnaire.

You will now be shown all the questions you need to answer. Answer the questions by:

- Upload the required document as prompted using the **File Upload** button

1 Social Value - Supplier Overview

Please upload your approach to social value along with any examples of initiatives you've previously done

Social Value - Supplier Overview

[File Upload](#)

Please note the maximum file upload size is 24576kB (24 MB). Only one file can be uploaded for this response. Please create a zipped file or combine files into one if you would like to include multiple documents in your response.
[Please upload a file](#)

Value

[Please enter your answer for this question](#)

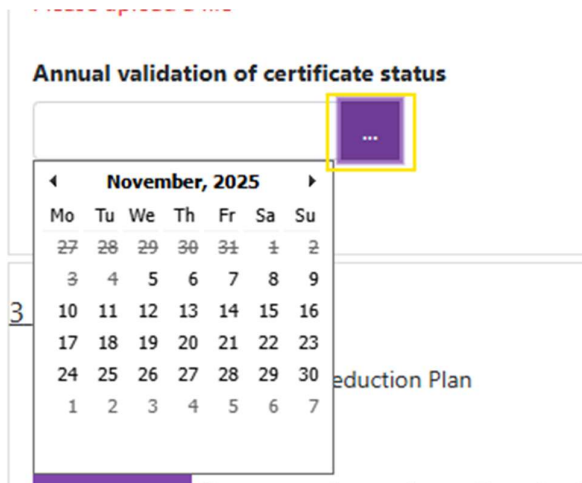
- Input a numerical value into the fields asking for a Value. You can only input numbers in here – a £ symbol and separator commas will be added automatically.

Value

1000000

£1,000,000

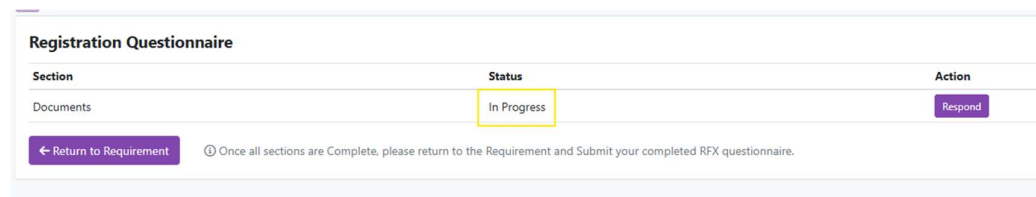
- Select dates in the fields asking for a Date by clicking on the ... to pull up a calendar to select dates from.



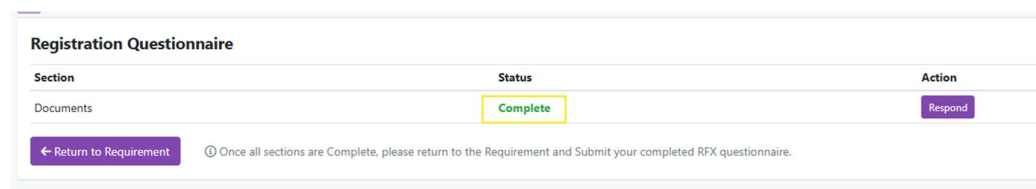
Note: Make sure you scroll down to the bottom and click **Save Answers** as you go. Documents uploaded and your answers aren't automatically saved, so you **MUST** click this button to save your progress.



You can save your answers as you go and come back to complete the rest later by clicking **Save and Close**. The status of your questionnaire will show as *In Progress* until you finish completion.



Once you've uploaded all the required documents and inputted all the details, the status will show as **Complete**.



You must now submit your answers. Your questionnaire has not gone through until you submit. To do so, click **Return to Requirement**.

Registration Questionnaire

Section	Status	Action
Documents	Complete	Respond

[← Return to Requirement](#) ⓘ Once all sections are Complete, please return to the Requirement and Submit your completed RFX questionnaire.

Then, click **Submit**.

Details	Description	RFX	Notices	Status	Reminders	Nudges	Audit				Excel	PDF
Search:												
Type	Name	Auction Details	Auction Date	Status	Reg Closing Date & Time	Response	Documents	Clarification Q&A	Progress	Action		
Tender	Registration Questionnaire (RQ)	N/A	N/A	ⓘ Response In Progress	31/12/2030 10:08	1	View	View	1/1	Respond	Opt out	Submit

Your Registration Questionnaire has now been submitted. The **Status** will change to 'Response Submitted' to indicate this

Status	R	T
ⓘ Response Submitted	3	

Asking Clarification Questions

If you need to ask a question about any of the documents or information being asked for in the Questionnaire, you can raise a **Clarification Question**.

Navigate back to the **RFX** tab of the Requirement.

Next to the questionnaire, click on **View** under the Clarification Q&A column.

Details	Description	RFX	Notices	Status	Reminders	Nudges	Audit					
Search:												
Type	Name	Auction Details	Auction Date	Status	Reg Closing Date & Time	Response	Documents	Clarification Q&A				
Tender	Registration Questionnaire (RQ)	N/A	N/A	ⓘ Response Not Started	31/12/2029 12:38	1	View	View				

This will display a list of all published Clarification Q&As. You may find the answer to your question has already been published. If you can't find a relevant already published answer, you can raise one yourself by clicking on **Ask New Question**.

Registration Questionnaire (RQ)

Close

Clarification Questions and Answers

Deadline for raising Clarification Questions is 31-12-2029 12:38

Questions about: All

Export to PDF

Export to Excel

No clarification questions found

If you still can't find the information you need about this questionnaire in the supporting documents or the answers above, you can ask a clarification question of your own. Please note that once answered, your question and answer will be published here for all interested parties to view.

Ask New Question

Input your question into the text box, then click **Submit Question**.

Registration Questionnaire (RQ)

Close

Clarification Questions and Answers

Deadline for raising Clarification Questions is 31-12-2029 12:38

Questions about: All

Export to PDF

Export to Excel

No clarification questions found

If you still can't find the information you need about this questionnaire in the supporting documents or the answers above, you can ask a clarification question of your own. Please note that once answered, your question and answer will be published here for all interested parties to view.

Ask New Question

Which Section or Document does your question relate to? Documents

Enter your question here

Upload Attachment ...

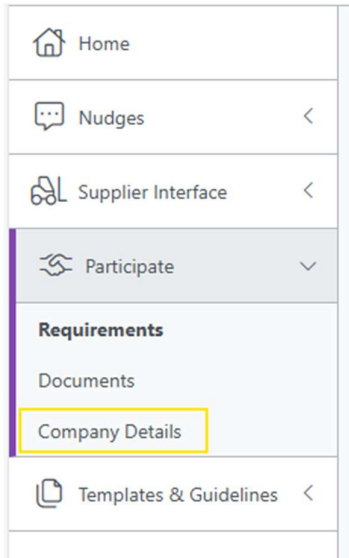
☐ We request a private response as we consider this clarification question to be commercially sensitive. ⓘ

Submit Question

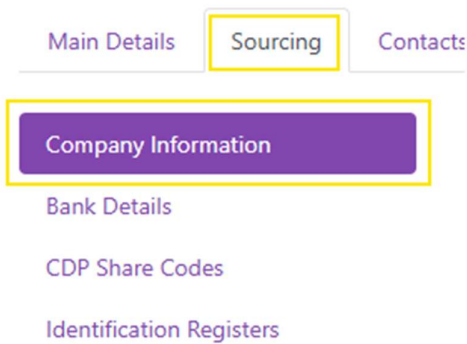
Company Details

It's important that you check and update your Company Details. Most of these will have been provided when you created an account.

Using the left-hand side toolbar, click on **Participate > Company Details**



Now, click on the **Sourcing** tab, then **Company Information**

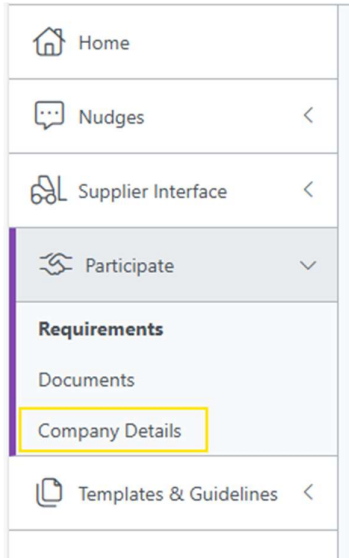


Review your details and update any as necessary, then click **Save**.

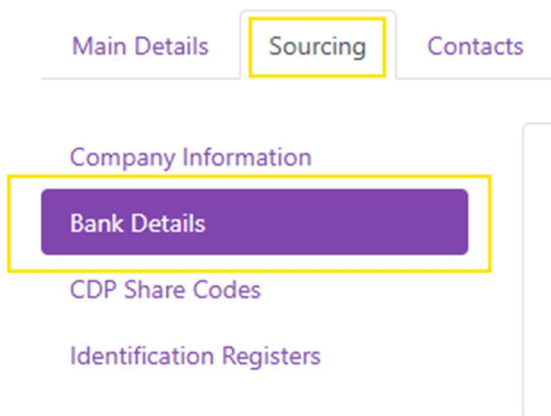
Bank Details

It's important that you provide your Bank Details.

Using the left-hand side toolbar, click on **Participate > Company Details**.



Now, click on the **Sourcing** tab, then **Bank Details**.



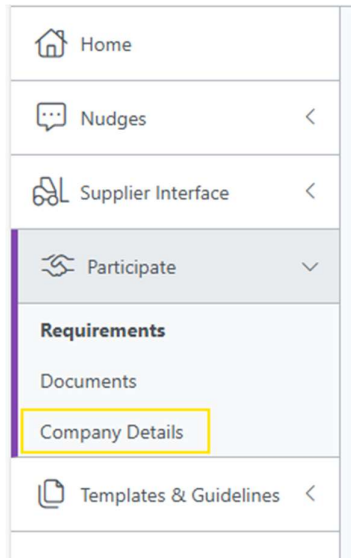
Input your bank details into the fields as required, then click **Save**.

[When asked to submit your bank details/ you have the option, please click **Submit**. This will submit your bank details to the designated Key User to review and approve]

Inviting your colleagues

You can invite your colleagues belonging to your organisation onto the software. This will allow them to have their own account under your organisation so they can log in and help to update information and complete tenders.

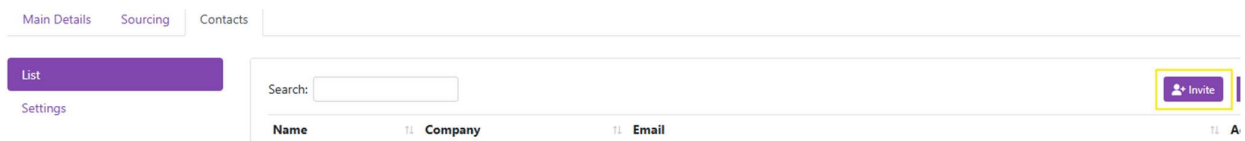
Using the left-hand side toolbar, click on **Participate > Company Details**



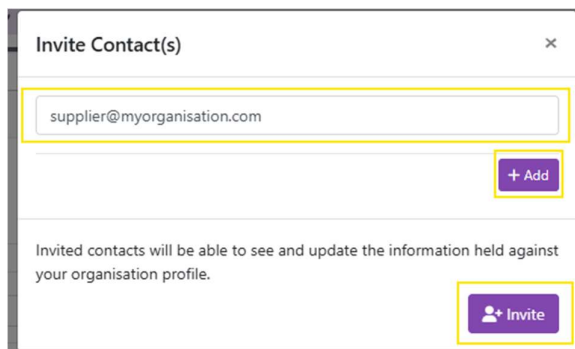
Now, click on the **Contacts** tab.



Within this tab, click on the **Invite** button.



Input your colleagues e-mail address into the field as prompted. You can click “Add+” to add additional fields if you wish to invite multiple colleagues.



Once inputted and you've added all your colleagues to invite, click the **Invite** button.

Your colleague(s) will now receive an e-mail inviting them to set a password in order to create an account to log on to the site.