

# Supplier Platform – How to complete your profile

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How to navigate your new Facilitiesline profile and  
become a verified member



Facilitiesline

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## How to complete your profile

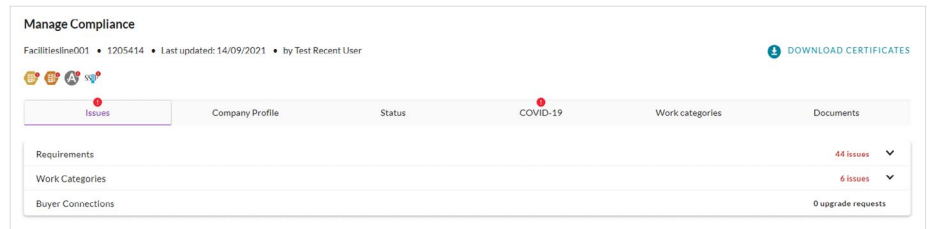
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# How to complete your profile

## Dashboard Overview

To start completing your profile, select 'Manage compliance', from the left hand menu

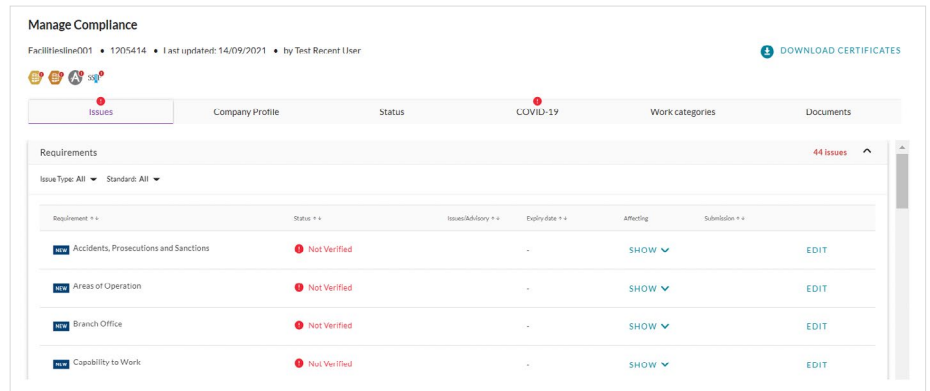
After selecting 'Continue' on the splash screen, you will see the following:



## Issues Tab

This tab gives you a quick overview of all sections that currently require action. Clicking on each section will display which requirements or work categories require attention (**a red exclamation mark will show which sections require action**).

By clicking on the 'Edit' button to the right, you can go directly to the relevant requirement and make the necessary updates.



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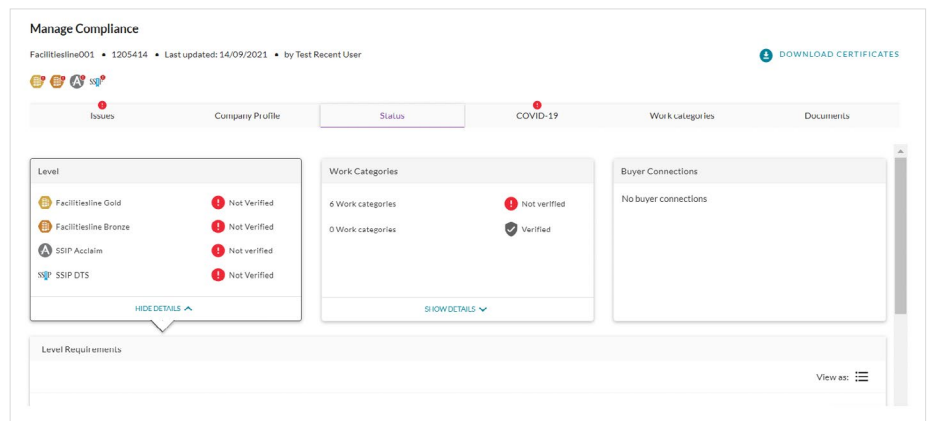
## Company Profile

This tab allows you to give buyers an overview/description of your company. By clicking the 'Edit' button, you can change this when necessary. This section does not require verification.

## Status

This tab is where you view and manage your compliance. Within the status area, you will see three sections:

1. **Level:** This shows the goals you have along with the verification status for each.
2. **Work categories:** This shows the verification status for your work categories.
3. **Buyer connections:** This will show you the buyers that you have a connection with, along with the compliance status for those buyers. A connection with a buyer means that they have added your business to their project or supply chain segment.



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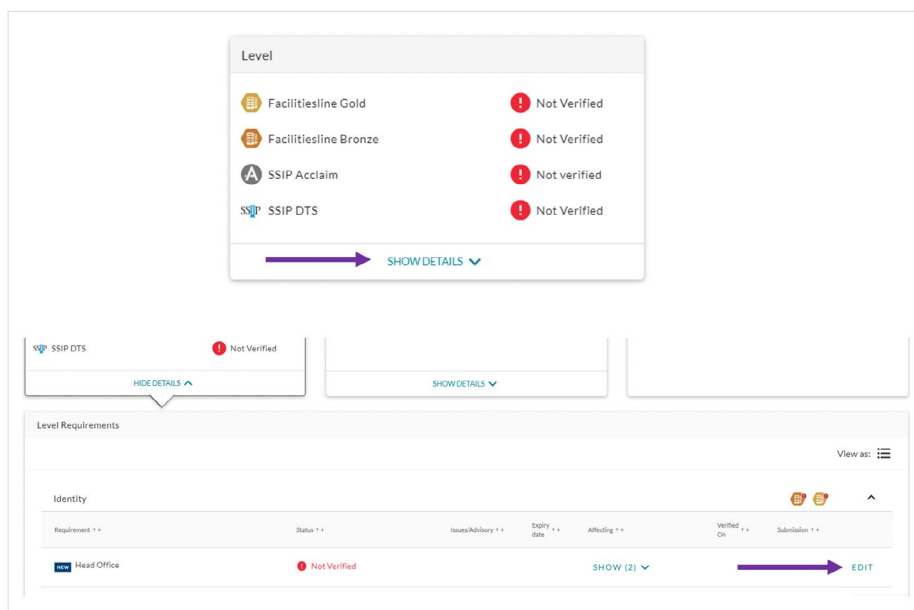
## Submitting/Editing Requirements

In order to view the details for compliance for the level you are on (e.g. Facilitiesline Bronze), you can select **'Show Details'** under the levels box.

This will expand the selection to show you all the sections that you must complete in order to achieve verification, along with your verification status for each one. Again, a red exclamation mark will show which sections require action. To view details, select the downwards chevron next to that section.

On viewing the details, you can see each requirement. These columns can be sorted, so if you want to bring the details of any non-verified section at the top, you can sort by column **'Status'**.

To look at the details and change any answers, you will need to select **'Edit'** next to the requirement.



Upon selecting **'Edit'**, the details and responses for that requirement will be shown. Once you have input your information, you have two options available in the top left corner:

1. **Submit:** This allows you to submit the requirement instantly.
2. **Ready for Assessment:** By ticking this box, you indicate that you have completed the requirement but you have not submitted it yet. Instead, you can use this function to submit multiple requirements at the same time once you have completed them all. We recommend this option as it is likely to reduce your waiting time.

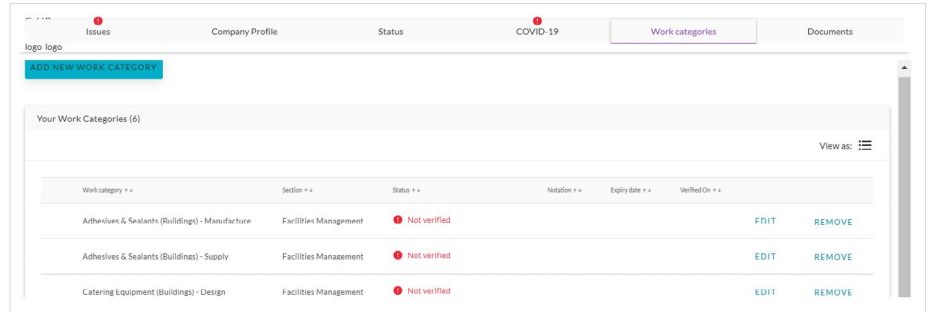
To exit the requirement, select **'Close'** at the top of the page.

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## Work Categories

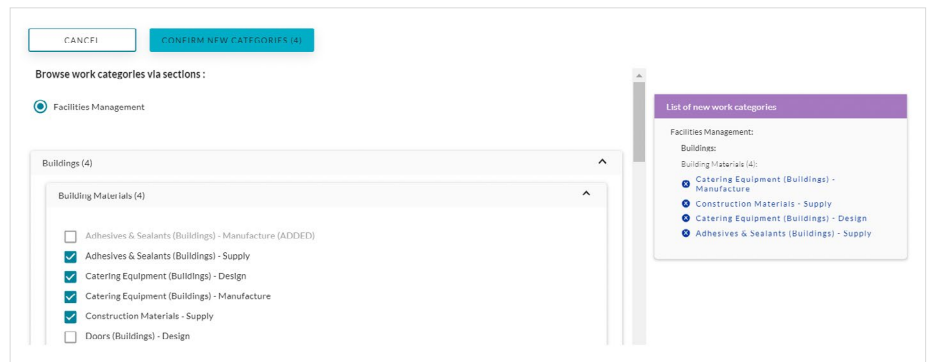
In this tab you will be able to edit your work categories. **Please note you will only be able to complete a work category once your Financial requirement has been verified.**

To add a work category, simply select the 'Add New Work Category' option towards the top left.



This will then display a list of work category sections, select the appropriate section and then the appropriate sub-section. It will then display your required Work Category with a tick box to the left-hand side.

You can select multiple Work Categories if need be, and they will be listed on the right-hand side. Once you have selected all your Work Categories, select 'Confirm New Categories' towards the top of the page.



Once you have selected your work categories, you will then need to complete them.

## How to complete your profile

Start by selecting **'Edit'** to the right-hand side; this will then display two fields that must be completed. Certain work categories may require you to upload a Licence or Certification and answer additional questions.

Once you have completed the required fields, select **'Save'** in the top right hand side. If the work category has any additional requirements they will be displayed below, and in order to be verified they all need to be completed. If your work category has no associated requirements, it will then auto-verify after a few minutes.

**Work Category:** Adhesives & Sealants (Buildings) - Manufacture

**Section:** Facilities Management • **Status:** Not verified • **Notation value:** • **Expiry date:**

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**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.

**!** This work category cannot be verified until you have declared your company turnover on the Financials requirement.

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

Select... 