Supplier Portal Guide

Contents

1. Introduction & Access

The University of Exeter Supplier Portal is a secure, web-based portal which enables our suppliers to login and review their supplier account.

Using the supplier portal you can update bank details, and contact details. You can also check the status of invoices, download remittances and review purchase orders.

This guide provides a high-level walk through of the supplier portal, explains how it's structured and some helpful tips in navigating and using the portal.

2. Logging In.

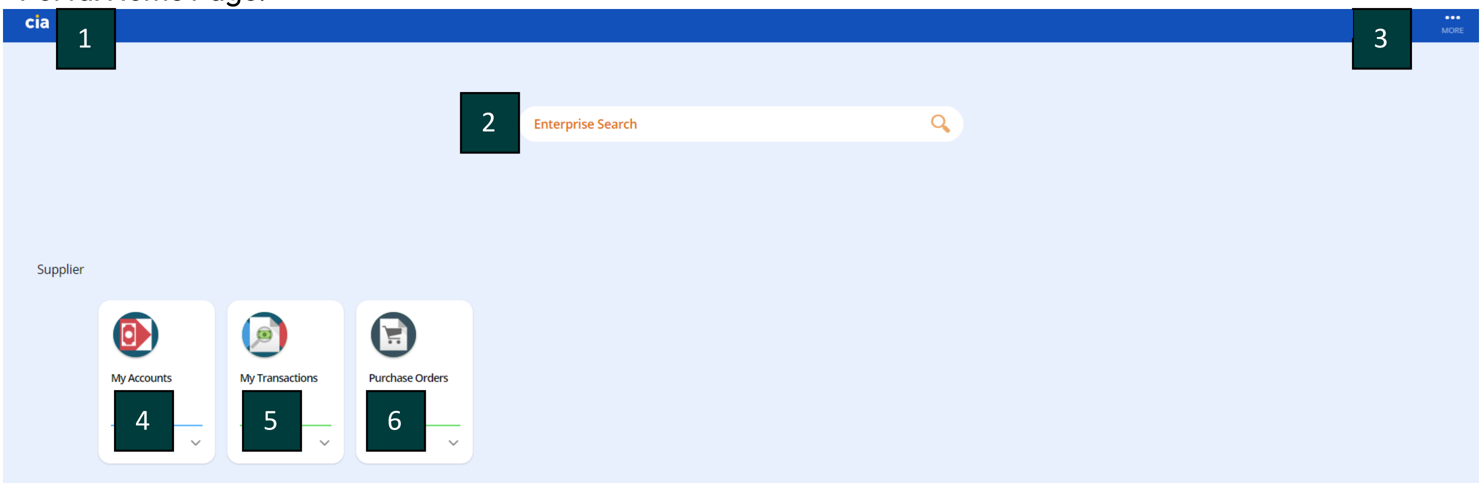
You would have received a unique set up link via email from the email address noreply@t1.exeter.ac.uk. This setup link will ask you to create your profile and your password. The link is available for 4 days, if you have not logged in within 4 days, please email Accounts Payable and ask for the link to be reset.

Once you have set up your account you can then use the link below to log into the portal going forward. It is important that once you have set up your account you use the link below to ensure you are in the correct version of the portal.

https://exe.t1cloud.com/T1Default/CiAnywhere/Web/EXE/LogOn/$SUPPLIER

3. Home Page

Once you have logged into the supplier portal, you will see a similar screen to the below. This is the Supplier Portal Home Page.

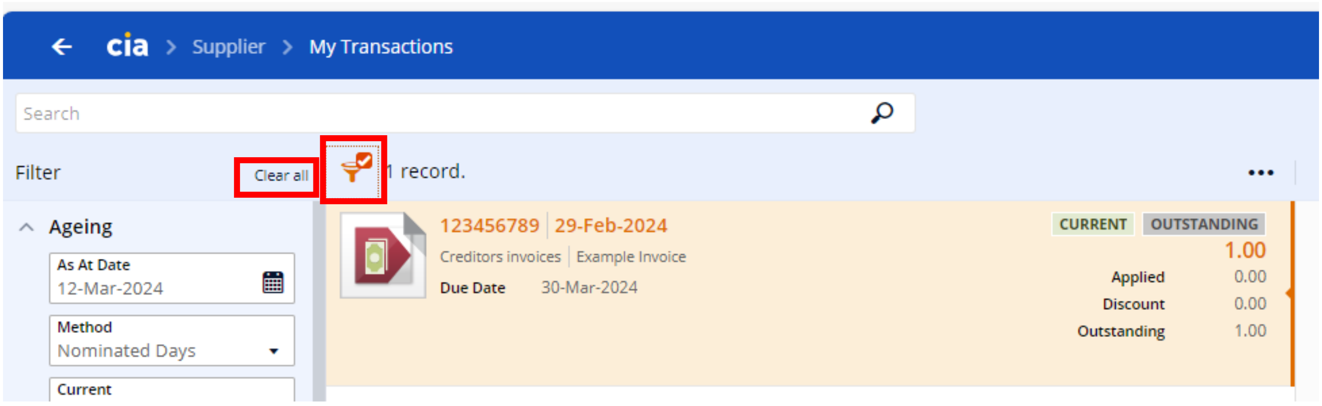


1. This is a quick 'home' button. No matter what screen you are in the portal, clicking this button will take you to this Home Page.
2. You can search the portal in this field.
3. You can see your supplier account details here.
4. Gives you access to view the account information you hold with us, and request changes to this information. Further information on this in the My Accounts Section.
5. Let's you see all transactions that we have on your supplier account that have been paid or are awaiting payment. Further information on this in the My Transaction Section.
6. Shows all purchase orders that we have on your supplier account. Further information on this in the Purchase Order Section.

4. Adding or Removing Filters

The portal will automatically default to include filters. This can sometimes lead to queries as not all the information is visible. Removing the filters is the same in any of the different areas of T1. To remove filters follow the steps below:

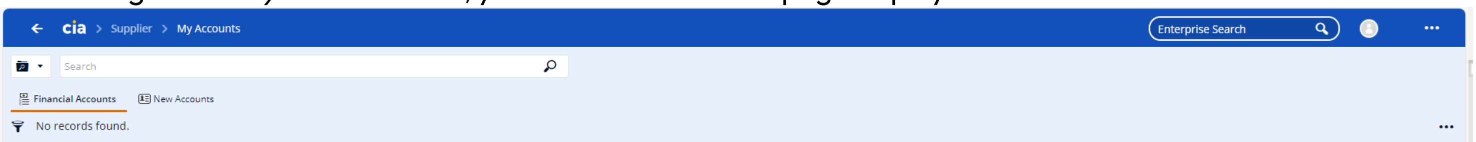
1. Open the area you are wanting to view the information.
2. The portal will automatically apply a filter to show outstanding transactions only. To see transactions that have been paid clear your filters as per the below.



3. In the filter pane on the left of your screen, there are options available to you to add a particular as you might require.

5. My Accounts

Selecting on the *My Accounts Tab*, you will have the below page displayed.



If we have no transactions on our accounts for you, your account will be visible under the *New Accounts Section.* Once there are transactions on your account, you can find your information in *Financial Accounts*

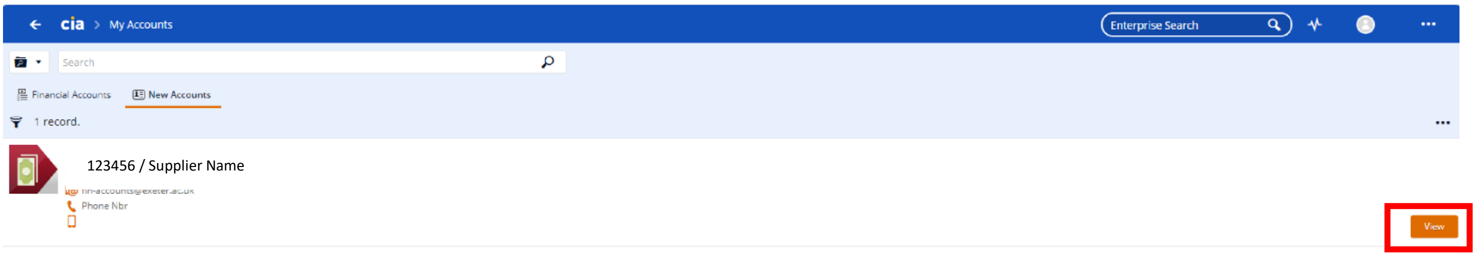
In this section you can update the below information:

- Bank Details
- Contact information (add, remove or update)

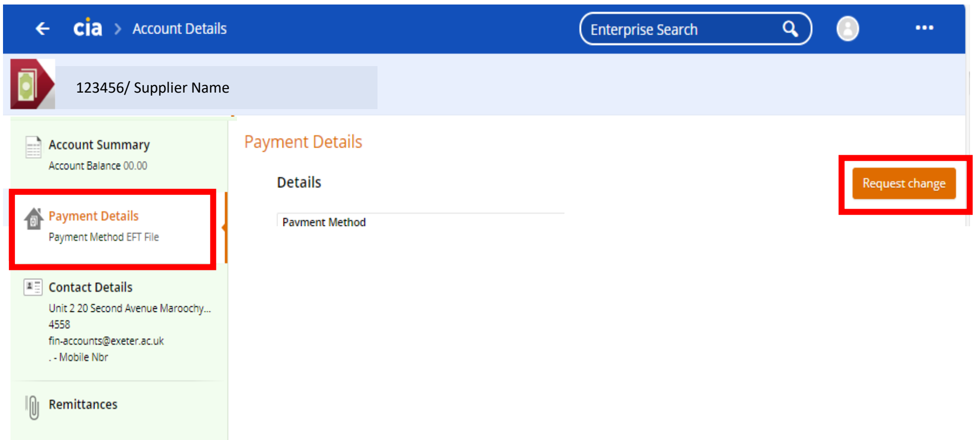
Can't find what you looking for? You might need to clear your filters as per instructions in section 4. Adding or Removing Filters.

Updating Bank Details.

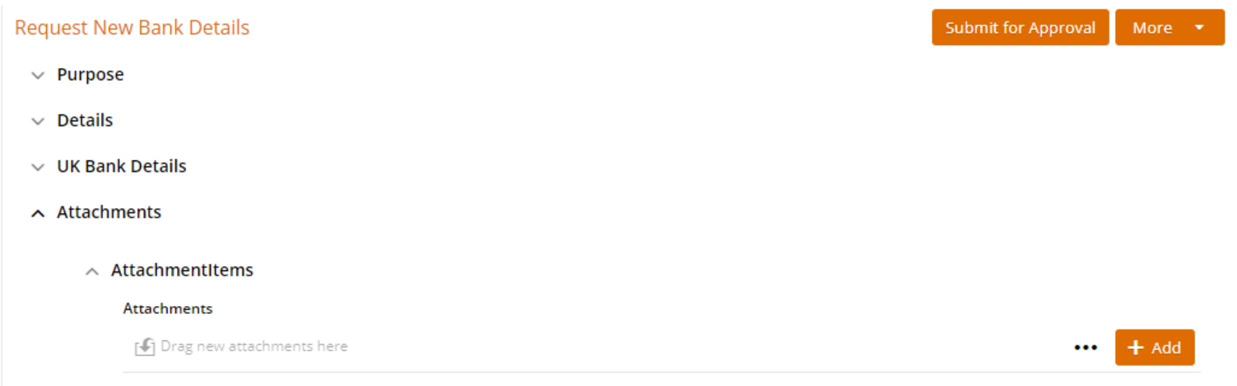
1. In your My Accounts, Select View. You will most likely need to clear filters at this stage as per instructions in section 4. Adding or Removing Filters.**



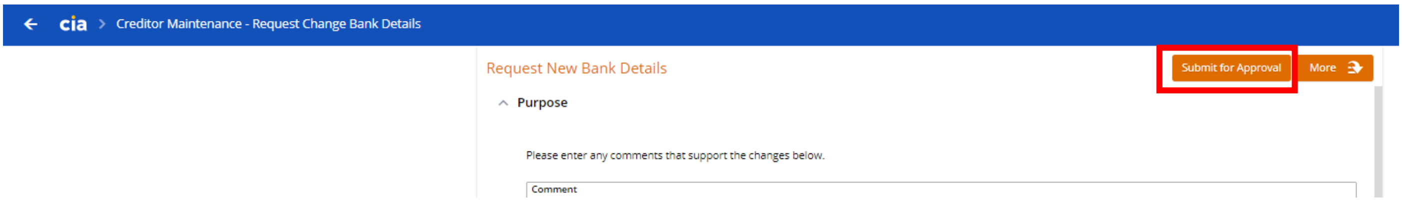
2. Select Payment Details and then Request Change. A preview of the information we have on file for you will be displayed.



3. Fill in the details in the relevant fields. **Be sure to upload a pdf document listing your bank details, or a bank statement, or a payment slip**.
4. You must attach your supporting bank statement or signed letterheaded document to the form. This can be done at the bottom of the screen below.



5. Once you have updated the details, and checked they are correct, *Submit for Approval*



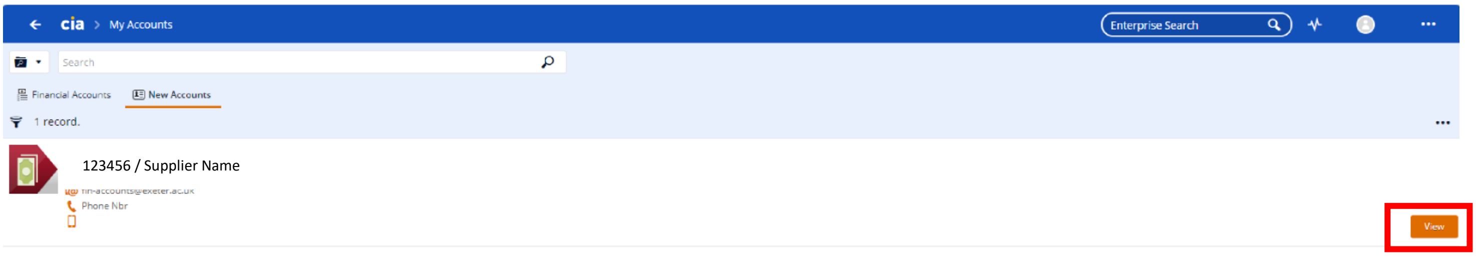
This request will now route to Accounts Payable for review and approval. If there are any problems with the information you have filled in, you will receive an email from T1 from Accounts Payable.

*** Please allow for 4 working days for the Accounts Payable Team to review these requests before sending any emails. ***

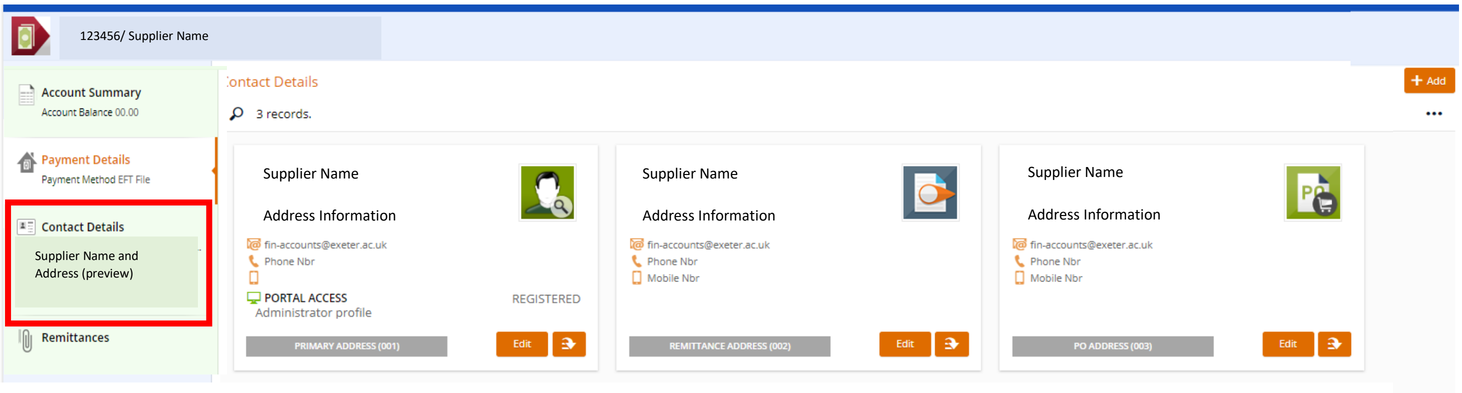
Contact Information (add, update).

***Very important- Do not delete contacts. If the contact on the card is no longer valid, you can update it by selecting Edit.**

1. In your My Accounts, Select View

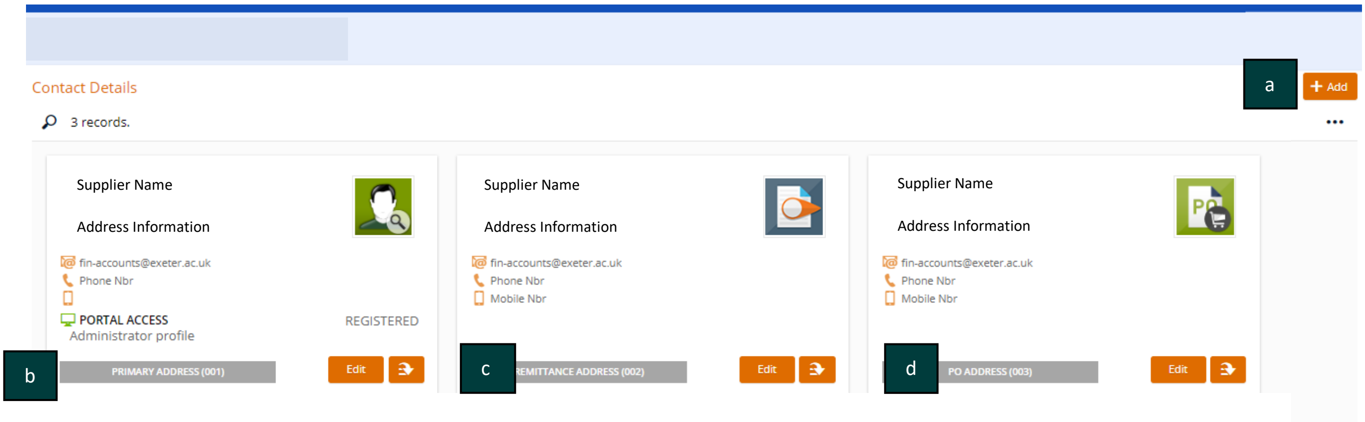


2. Select Contact Details- this will display all the contact information we have in our system for you.



3. Updating details.

Selecting **Edit** in any of the contact cards will allow you to update the information per tile.



a. You can add new contact information using the **+Add** button.

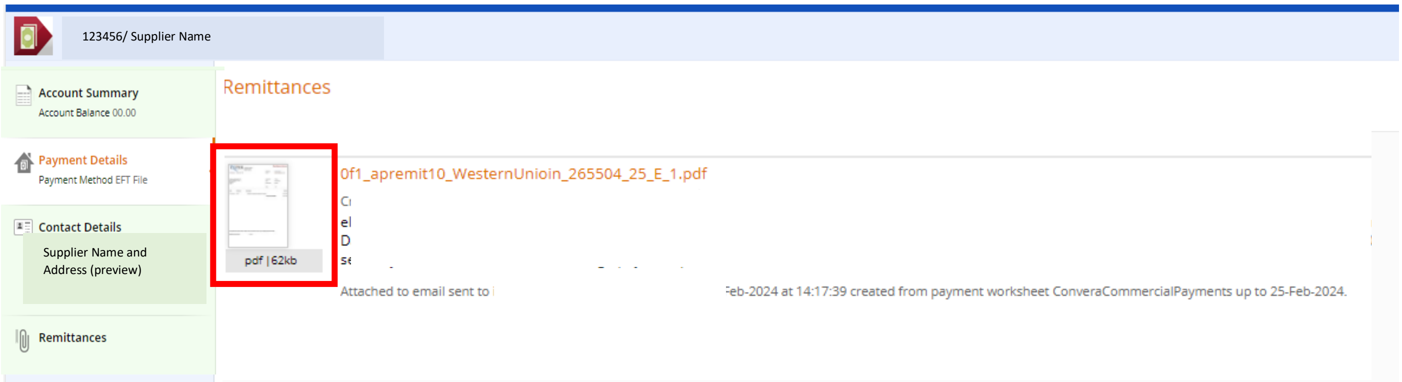
You can see the type of address each contact card has. In the above example

b. Is where all primary correspondence will go to. This includes purchase orders if there is no purchase order contact card.
c. This is the email address the remittance will go to once we have made payment.
d. This is the email address that the purchase order will go to when an order is raised. The street address on this card is the address that will be on the purchase orders.

Remittance Advices

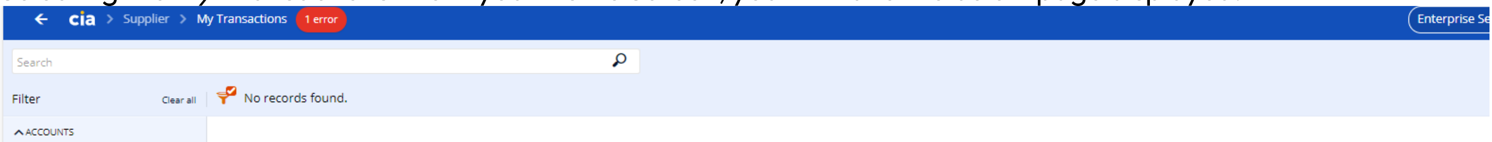
You can download copies of remittance advices by selecting *Remittances* as per the below

Clicking on the PDF preview as pictured below will pop up a copy of the remittance.

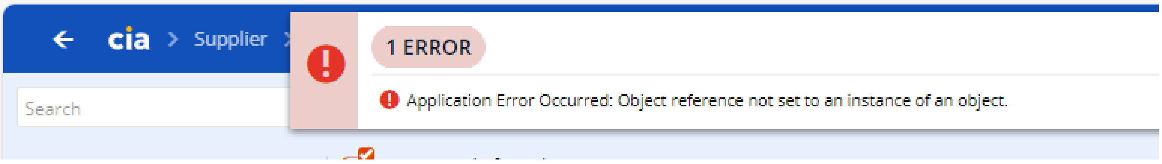


6. My Transactions

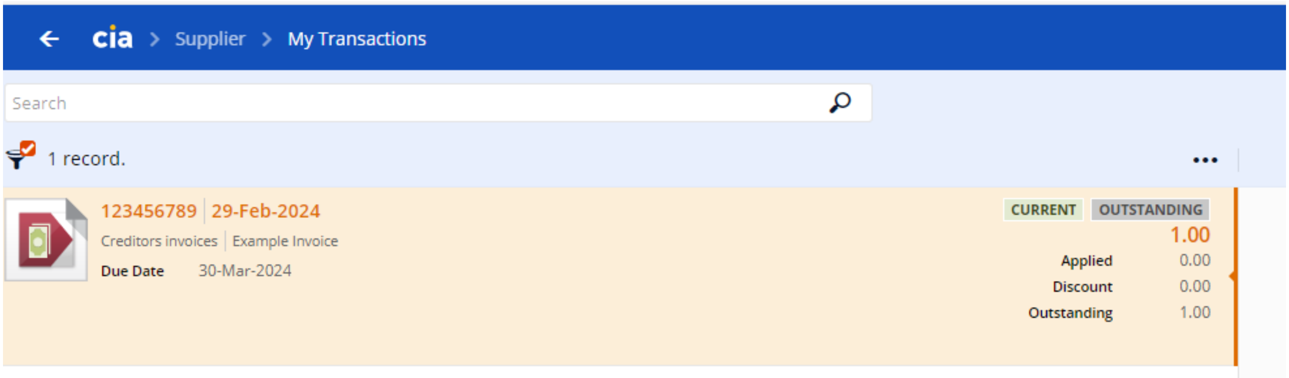
Selecting the *My Transactions Tile in* your Home Screen, you will have the below page displayed.



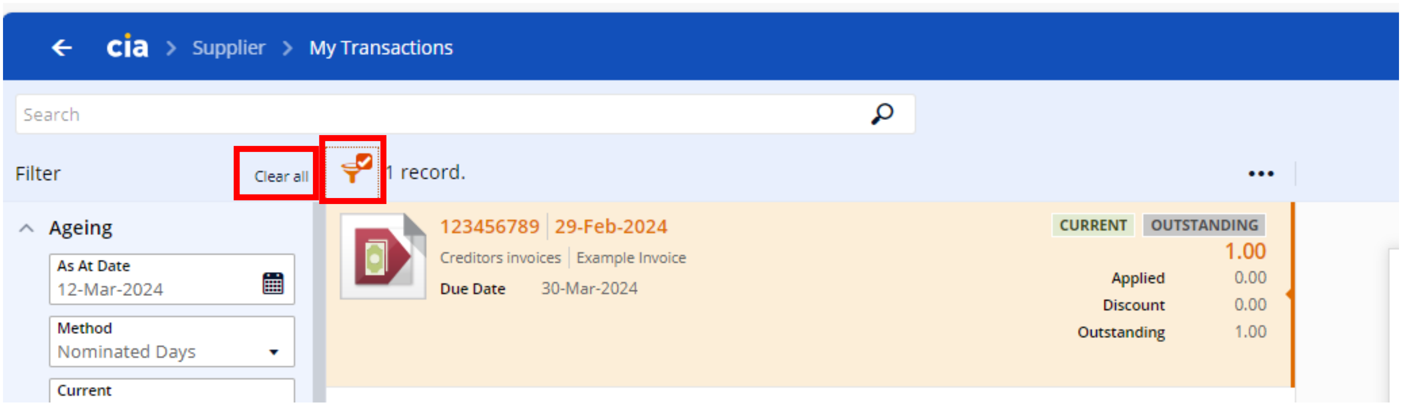
Don't be alarmed if you see the below error message. This just means that we have not posted transactions on your account yet. Once there are transactions posted, this error will clear.



In My Transactions, you can see all the transactions that have been posted to your account.



The portal will automatically apply a filter to show outstanding transactions only. To see transactions that have been paid, clear your filters as per the below.

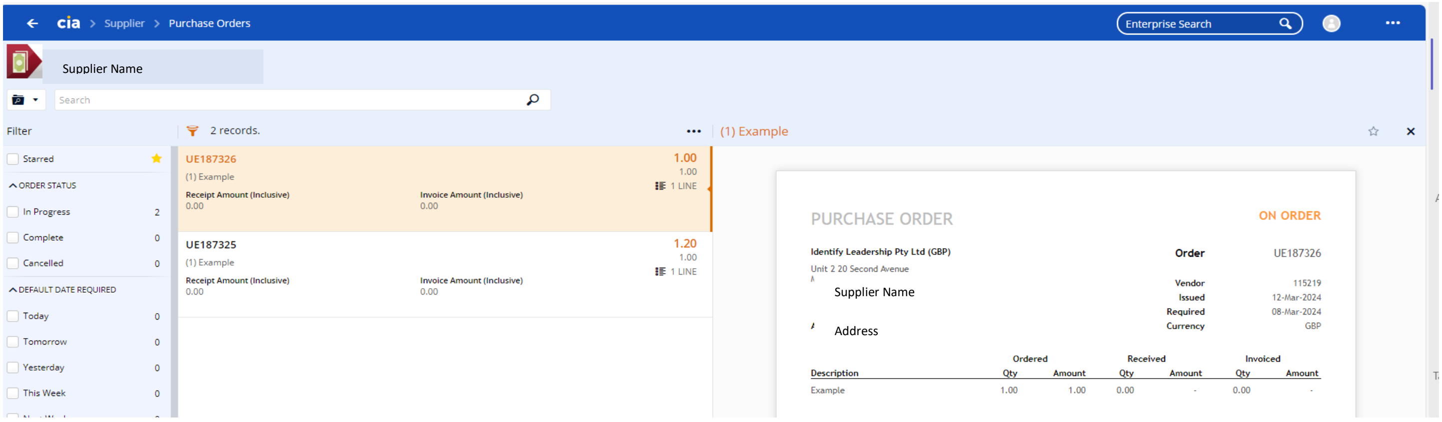


In the filter pane on the left of your screen, there are options available to you to add a particular filter as you might require.

7. Purchase Orders

You can view your purchase orders in this area. Please note that purchase orders will be emailed to the email address we have on file for you, refer to section 5. My Accounts. You do not need to download these yourself.

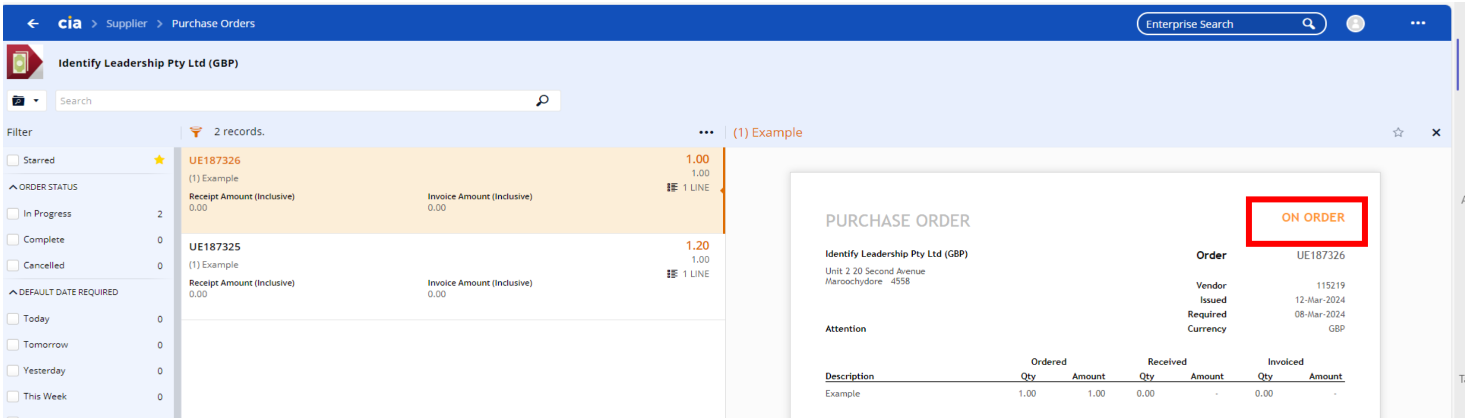
1. Selecting the *Purchase Order Tile in* your Home Screen, you will have the below page displayed.



The page will display a list of all purchase orders on your account. You can add filters to this page in the left-hand pane.

Can't find what you looking for? You might need to clear your filters as per instructions in section 4. Adding or Removing Filters.

You might notice the different statuses of an order:



The below is what each one means:

- On Order
  - This shows a purchase order that has been requested and not yet receipted by the person that raised it. There can be a delay in receipting and delivery, so please allow 5 working days before contacting the person who raised the purchase order.
- Complete
  - This purchase order has been fully utilised and invoices received for it. You cannot issue any further invoices using this purchase order. Please liaise with your contact at the University to request a valid, open PO number.
- Fully Received
  - The member of staff at the University has receipted the order confirming that they have received the goods or services.
- Partially Received
  - The member of staff at the University has partially receipted the order confirming that they have received part of the goods or services.
- Cancelled
  - This order has been cancelled and cannot have invoices raised against it.