

FUSION²¹N

Supplier Guide

Valuation Portal



Introduction

Welcome to the Fusion21 Valuation Portal.

This portal has been designed to make it easy for you to submit and track valuations for your contracts.

In this guide you will learn how to:

- Log in and access your contracts
- Submit valuations (including “no change” returns and final accounts)
- Track the status of your submissions
- Get help if you need support

Accessing the Portal

- You will receive an email from valuations@fusion21.co.uk when your valuations are due.
- The email contains a secure link to your contract(s).
- No username or password is required – simply click the link.

Viewing Your Contracts

- Once you log in, you'll see a list of your contracts which require a valuation submission.
- On the left of each contract you will see:
 - **Fusion21 Reference Number**
 - **Your Reference Number** (if not yet provided, this will appear blank).
- On the right, you will see the **status of the request** (e.g., *Submitted Today*, *Pending Approval*, *Overdue*).

Fusion21 Ref: 12345-01-01 Your Ref: Project 57	Submitted Today ▾
Fusion21 Ref: 12345-03-01 Your Ref: Project 63	17 days remaining ▲
Fusion21 Ref: 12345-07-01 Your Ref: Project 71	17 days remaining ▲
Fusion21 Ref: 12345-05-01 Your Ref: Project 75	17 days remaining ▲

Expanding a contract gives you further options, including:

1. Your Project Reference – update or add your own reference for the project.

Fusion21 Ref: 12345-01-01 | Your Ref: Project 57

17 days remaining ^

Your Project Reference

Project 57

Update

2. Project Details – view more information such as framework, member organisation, contract status, and fee structure.

Fusion21 Ref: 12345-01-01 | Your Ref: Project 57

17 days remaining ^

Your Project Reference

Project 57

Update

Project Details ^

Member Organisation:

Member123

Project Description:

H,R, & E Lot 1 and Lot 6 - Domestic and Commercial Heating Servicing and Installations DA Liberty

Contract Status:

Live

Fee Structure:

Inclusive

Contract Start Date:

01/08/2024

Framework:

Heating, Renewables and Electrical Framework (2024-28)

Lot:

Lot 1 Domestic Heating (Combustibles)

Fee Percentage:

2.0 %

Invoice Period:

Monthly

3. Submit Your Latest Valuation – enter and submit your valuation for

Submit Your Latest Valuation

Date Valuation Applies To

31/08/2025

End date of the period this valuation covers.

Current Cumulative Valuation ⓘ

£ Enter current cumulative valuation

No Change in Valuation

Last Valuation Date: 30/06/2025 Last Valuation: £1,495,206.04 Spend Since Last Valuation: £0.00 Fee Due: £0.00

Purchase Order Number

Enter purchase order number

Please note: Any information entered in this field will appear on the invoice.

Comments

Enter any comments or notes regarding this valuation

☐ If the contract is now complete and there are no further valuations (i.e. this is the final account figure), please tick this box.

Save and Submit Later

Submit Valuation

4. Recent Valuation History – review previous submissions, including dates, fees, and PO numbers.


Recent Valuation History ^								
Date Submitted	Submitted By	Date Applies To	Cumulative Valuation	Fee %	Total Fee	Spend Since Last Valuation	Fee Due	PO Number
31/07/2025	Supplier123	30/06/2025	£1,397,205.02	2.0 %	£28,498.88	£379,207.23	£6,234.25	Not Provided
28/04/2025	Supplier123	31/03/2025	£1,169,153.55	2.0 %	£23,989.10	£423,199.71	£6,444.97	Not Provided
05/02/2025	Supplier123	31/12/2024	£805,763.43	2.0 %	£16,544.47	£825,356.22	£15,700.80	Not Provided

Submitting a Valuation

1. Select the contract you wish to update.
2. Under **Submit Your Latest Valuation**, complete the following fields:
 - **Date Valuation Applies To** – select the end date of the period this valuation covers.
 - **Current Cumulative Valuation** – enter the total spend to date on this contract.
 - If there is no change, click No Change in Valuation and the field will be populated automatically.
 - Once you enter a figure, the system will automatically calculate:
 - Spend Since Last Valuation
 - Fee Due
 - **Purchase Order Number** – if required by your organisation, enter it here (this number will appear on your invoice).
 - **Comments** – optional, use this field to add any notes relating to your valuation.

Submit Your Latest Valuation

Date Valuation Applies To

 31/08/2025

End date of the period this valuation covers.

Current Cumulative Valuation

£ £1,495,206.04

No Change In Valuation

Last Valuation Date: 30/06/2025 Last Valuation: £1,495,206.04 Spend Since Last Valuation: £0.00 Fee Due: £0.00

Purchase Order Number

Enter purchase order number

Please note: Any information entered in this field will appear on the invoice.

Comments

Enter any comments or notes regarding this valuation

Final Account

- If the contract is now complete and no further valuations will be submitted, tick the box marked Final Account before submitting.
- ☒ If the contract is now complete and there are no further valuations (i.e. this is the final account figure), please tick this box.

Submission Options

Once the fields are complete, choose one of the following:

- **Submit Valuation** – send your return immediately.
- **Save and Submit Later** – save your draft and return to it later.

Save and Submit Later

Submit Valuation

Key Reminders

- Ensure valuations are submitted by the due date to avoid overdue status.
- Always provide accurate PO Numbers where required – these will appear on invoices.
- Fees are automatically calculated based on your cumulative valuation and shown in the portal.

Help & Support

If you have questions or experience issues:



valuations@fusion21.co.uk



0845 308 2321

FUSION²¹

Unit 2 Puma Court,
Kings Business Park,
Knowsley,
L34 1PJ

 0845 308 2321

 info@fusion21.co.uk

 fusion21.co.uk

 [fusion21-ltd](https://www.linkedin.com/company/fusion21-ltd)