## **FUSION**

# 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 <u>valuations@fusion21.co.uk</u> 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.

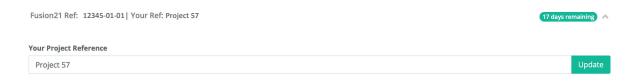
## **Viewing Your Contracts**

- 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).

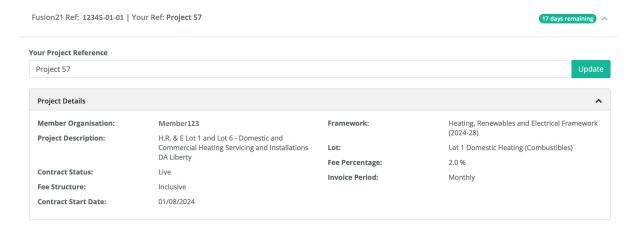


#### Expanding a contract gives you further options, including:

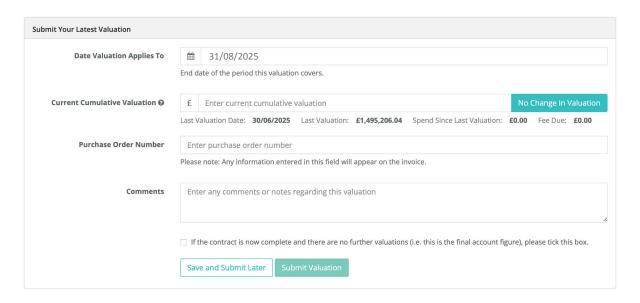
1. Your Project Reference – update or add your own reference for the project.



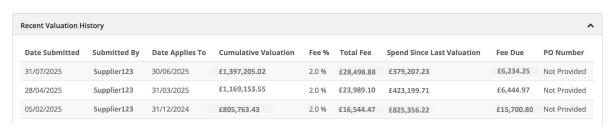
**2. Project Details** – view more information such as framework, member organisation, contract status, and fee structure.



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

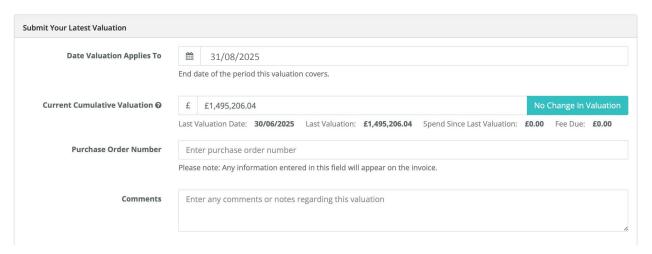


**4. Recent Valuation History** – review previous submissions, including dates, fees, and PO numbers.



## **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.



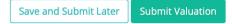
#### **Final Account**

- 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.



## **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

## **FUSION**

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

- 0845 308 2321
- info@fusion21.co.uk
- fusion21.co.uk
- in fusion21-ltd