



Edinburgh Napier University's Proactis Marketplace – A Step by Step Guide

Contents

Introduction	3
Contact details	3
Logging into the Marketplace	4
Viewing Open Purchase Orders	5
Generating an Invoice using PO Flip functionality	6

Introduction

Welcome to the step by step guide on how to use Edinburgh Napier University's Proactis Marketplace. The marketplace allows any supplier to receive and view their open purchase orders, set up and maintain product catalogues, and submit invoices for faster processing, either by XML or using Proactis' 'PO Flip' functionality.

If you're interested in submitting XML invoices or having a hosted or punch out catalogue on Proactis, please contact Proactis using the details in the section below.

Contact details

Edinburgh Napier University –

Procurement – procurement@napier.ac.uk

Accounts Payable – accountspayable@napier.ac.uk

Technical Assistance – Corporatesystems@napier.ac.uk

Proactis –

Support & Queries - marketplaceSuppliers@proactis.com

Logging into the Marketplace

When any new supplier is added to our Proactis Marketplace, they will receive an email with login details. This login link will be valid for 24 hours.


Important Next step

Please use this link to create or reset your password:
<https://proactis.training.egsgroup.com/idea/useradmin/password-setup.html?token=b099a5ed9eb923211e15a741bd6eb06b2c59aab26c2d33912dde0de117b5498a>

Please note, for security reasons this URL will expire on Thu, 18 Jun 2020 09:57:45 BST

To log into the system, please use your User ID shown below and your password:

User ID: feo126671



Click on the link in the email to set a password and a reminder question. Insert a new password and click the 'Set' button. This will automatically log you into the supplier portal.

Password setup

Username feo126671
Organisation [REDACTED]

Password must meet several requirements ⓘ

You will then be asked to set up a Password Lookup facility. If you forget your password, the Marketplace will email you a URL link which you can use to reset your password by answering your Password Lookup question correctly. Please note the answer to the Password Lookup question is case sensitive.

Once the initial password set up is complete, the Proactis Supplier portal can be access via the following link:

<https://proactis.egsgroup.com/idea/useradmin/login.html>

How to get help -

Contact Procurement@napier.ac.uk if you require a new Welcome email to reset your password or if the link in the above mentioned email no longer works.

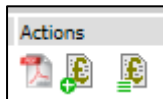
Viewing Purchase Orders

The main home page of the supplier portal will show you the last five Purchase Orders that have been sent to the marketplace from Edinburgh Napier University.

Purchase Order No.	Date
21049003	10/06/2020 12:24PM
21049002	10/06/2020 12:24PM
21048997	14/05/2020 10:19AM
21048996	14/05/2020 10:19AM
61048996	14/05/2020 9:49AM
[more]	

By clicking on the 'more' button shown above, you can obtain a list of all purchase orders.

There are several icons that you will see on both these pages:




PDF Logo – click on this button to obtain a pdf copy of the purchase order



£ symbol with '+' - click on this button to generate an e-invoice for the purchase order

£ symbol with lines - click on this button to view all e-invoices for the purchase order

Generating an Invoice using PO Flip functionality

The PO Flip functionality allows you to swap your purchase order directly into an invoice. This will allow your invoice to be processed correctly, the first time, which should result in more prompt payments.

1. To generate an e-invoice, click on the  symbol next to the purchase order you'd like to make an invoice for.
2. This will open the e-invoice screen – everything highlighted in red is a mandatory field.

VAT only invoice	<input type="checkbox"/>
Supplier Name:	Office Depot, GBP
Invoice Number:	<input type="text"/>
Title:	<input type="text"/>
Comments:	<div style="border: 1px solid black; height: 80px;"></div>
Invoice Date:	<input type="text"/>  dd/mm/yyyy
Tax Point Date:	<input type="text"/>  dd/mm/yyyy
Total Excl. VAT:	£ <input type="text"/>
Total VAT:	£ <input type="text"/>
Total Inc. VAT:	£ <input type="text"/>
Purchase Order Number:	21049003
VAT Reg. No.:	673478594(request change)

Input:

1. An Invoice Number
2. Invoice Date
3. Tax Point Date (this will automatically update with the Invoice Date, but is changeable)
4. Total Excl. VAT
5. Total VAT
6. Total Inc. VAT

Tip – Use the ‘Calculate Totals’ section at the bottom of the screen to complete items 4-6 (see step 6, below)

3. The second section allows you to customise your invoice:

Select lines from purchase order 21049003 to be added to the e-invoice. Show gross values

<input checked="" type="checkbox"/>	PO Line	Item Code / Job ID	Manufacturer	Product/Service Description	PO Qty / Value	Inv Qty	Unit Price / Value	UOI	Total	VAT Rate	Calculated VAT	Custom VAT
<input checked="" type="checkbox"/>	1	3012334		Item 1	50.00	50.00	£ 0.860	PK	£43.00	Standard (20%)	£8.60	£
<input checked="" type="checkbox"/>	2	1178099		Item 2	10.00	10.00	£ 1.080	PK	£10.80	Standard (20%)	£2.16	£

- Tick all lines to be billed on the invoice in the first column.
- Update invoice quantity and unit value price, if appropriate
- Update VAT rate, if required

- There is also the ability to add additional invoice lines which don't come from the purchase order. For example, if the goods being delivered require a carriage charge.

add non purchase order lines to the e-invoice

PO Line	Item Code / Job ID	Manufacturer	Product/Service Description	Quantity	Unit Price / Value	UOI	VAT Rate	VAT
	1		Carriage	n/a	£ 50	By value	Standard (20%)	£
					£	By quantity	Select One ...	£
					£	By quantity	Select One ...	£


add non-po lines to e-invoice

- Input an Item Code
 - Update the description, quantity, and unit price/value
 - Change the UOI to fit with the item (ie by value or by quantity)
 - Update the VAT rate accordingly
- Once complete, click on the 'add non-po lines to e-invoice' button. The screen will update and the additional line will look as follows:

Select lines from purchase order 21049003 to be added to the e-invoice. Show gross values

PO Line	Item Code / Job ID	Manufacturer	Product/Service Description	PO Qty / Value	Inv Qty	Unit Price / Value	UOI	Total	VAT Rate	Calculated VAT	Custom VAT
<input checked="" type="checkbox"/>	1 3012334		Item 1	50.00	50.00	£ 0.860	PK	£43.00	Standard (20%)	£8.60	£
<input checked="" type="checkbox"/>	2 1178099		Item 2	10.00	10.00	£ 1.080	PK	£10.80	Standard (20%)	£2.16	£

add non purchase order lines to the e-invoice

PO Line	Item Code / Job ID	Manufacturer	Product/Service Description	Quantity	Unit Price / Value	UOI	Total (ex. VAT)	VAT Rate	Calculated VAT	Custom VAT	Action
1			Carriage	n/a	£ 50		£50.00	Standard (20%)	£10.00	£	

- There is a calculated total section at the bottom of the screen.

calculated totals

Total Ex. VAT	Invoice Total VAT	Total Inc. VAT
£103.80	£20.76	£124.56

recalculate totals continue





This can be used to fill in your invoice values from the first section. If you've update any invoice quantities or prices from the PO lines, or added any additional lines, click on 'recalculate totals' to get an updated figure.

- If the invoice is complete, click the 'continue' button.

Note: the system will advise if you're overbilling the purchase order or if your totals don't add up.

8. If the e-invoice has been successfully generated, you will get the following:

E-invoice successfully created
Below are the e-invoices for order [21049003](#).

Invoice Number	Invoice Date	Source Format	Invoice Status	Actions	Net	VAT	Gross
test	17-Jun-2020	Supplier PO Flip	awaiting processing	 	103.80	20.76	124.56
1106-1	11-Jun-2020	Supplier PO Flip	accepted	 	43.00	0.00	43.00

Net Total : 146.80 VAT Total : 20.76 Gross Total : 167.56

This screen also shows all invoices inputted against that particular purchase order.

9. Click on the Home button at the top of the screen to return to the home page.

How to get help –

Contact corporatesystems@napier.ac.uk if you're having any trouble processing an e-invoice.