

How to: Amend your details for University of Sussex

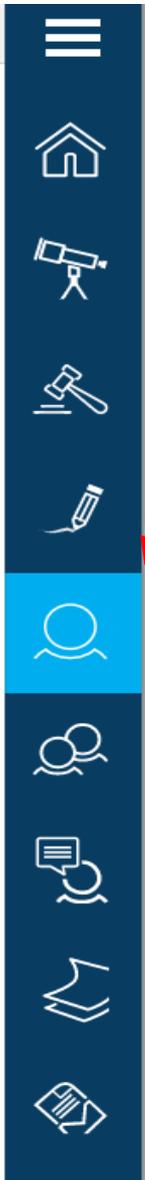
1. Bank Details and Email Addresses

- Log into the Proactis Supplier Portal using your username (email address) and Password.

<https://supplierlive.proactisp2p.com/Account/Login>

- On the taskbar on the left hand side select “Customers” (single head icon – as in image to the left, highlighted light blue). Search University of Sussex

- Please Click Edit. (As in image below, circled Yellow)



Your Customers Admin User K.Feldman Test

From here you can search for and manage your customers and customer-specific information.

Search by customer name... Search Customers (49)

Customer Name	Primary Contact	Address	Town	Status	Show Me
University of Sussex	UAT PROACTIS Admin	Sussex House, Falmer	Brighton, UNITED KINGDOM	Reviewed	

Documents
No documents found

Customer Contacts

Name	Contact	Address
Pippa Robertson	p.robertson@sussex.ac.uk 0121012122122	Sussex House, Falmer, Brighton, BN1 9RH, UNITED KINGDOM

- Click on “Additional Data” tab.

Edit Customer Information Back Save

From here you can amend customer specific information for University of Sussex.

Categories Additional Data

Additional Data

Factoring Company (relevant if you use a third party to collect payment)
Please select a payment factor if relevant, if not here, please contact suppliers@sussex.ac.uk

Supplier Country: GB - United Kingdom

Bank Account Holder Name: As written on your bank account e.g. Supplier Ltd

Bank Sort Code: (DO NOT ENTER SPACES OR HYPHENS)
456789

Bank Account Number:
12345678

IBAN Number:

Swift Code:

Currency to be paid in (we will endeavor to pay you in this wherever possible):

Please enter your company email address for receiving Purchase Orders *

Please enter your company email address for receiving Invoice enquiries *

Please enter your company email address for receiving Remittance Advices *

Procurement Notes (University use only)

- Please ensure there are **no spaces or symbols** in the fields, e.g. hyphens, dots, dashes, slashes or brackets
- UK bank sort-codes should be in the following format: 123456 (no spaces or symbols)
- If you wish to be paid in GBP via UK BACS, please **do not add** an IBAN or Swift.
- Please ensure your email addresses for Purchase Orders, Invoice Queries and Remittance Advice are correct.
- Please provide a copy of your bank details on headed paper to suppliers@sussex.ac.uk for verification.

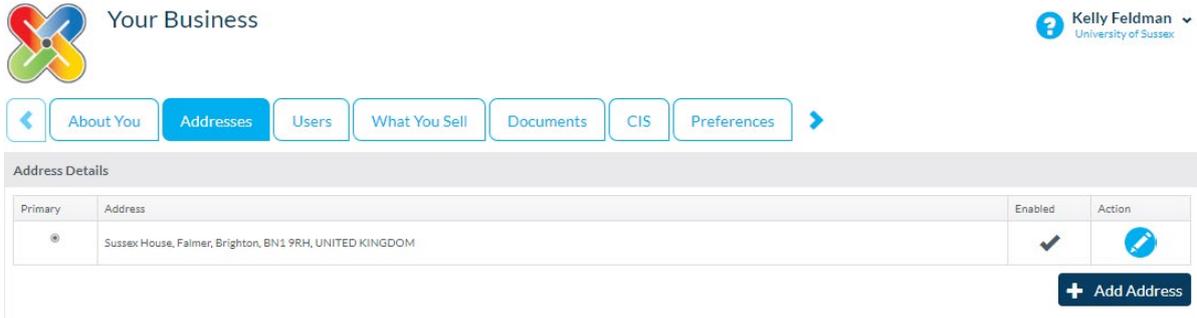
DON'T FORGET TO CLICK SAVE!!

2. Address and Telephone Number

Once you have accessed the portal you can update your address by clicking on the icon in the top right of the “Supplier network” window and following the drop down to “YOUR BUSINESS”.



Navigate to “ADDRESSES”



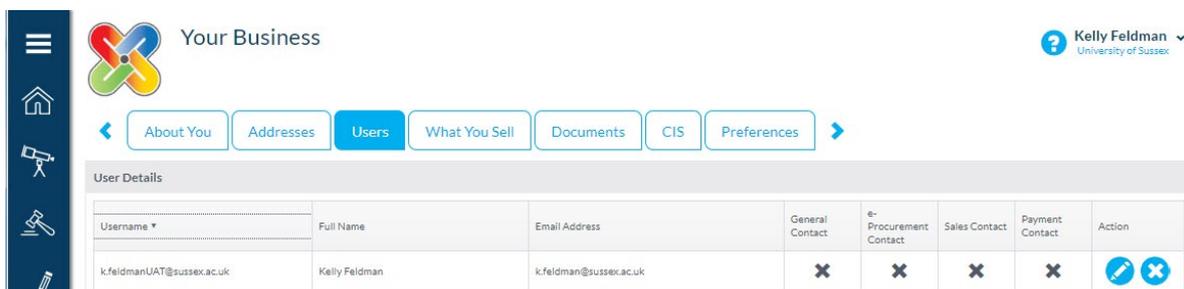
Here you can see the address for your organisation.

Click on the blue pencil to edit.

3. Adding New/Amending Users

Once you have accessed the portal you can update your USERS by clicking on the icon in the top right of the “Supplier network” window and following the drop down to “YOUR BUSINESS”.

Navigate to “USERS”



You can Edit (pencil icon) or Delete (cross icon) users and it is your responsibility to give access to records as per your own organisations policies – please bear in mind bank details are visible and editable if during the process you give the “Administrator” access.

To ADD a new user use the “add user” button

The screenshot shows a dialog box titled "Add/Amend User" with two tabs: "User Details" (selected) and "Contact Type". The "User Details" tab contains the following fields and options:

- Email Address * (required)
- Telephone Number * (required)
- First Name *
- Mobile Number
- Surname *
- Fax Number
- User is an Administrator ⓘ
- Username same as Email address
- Address: Sussex House, Falmer, Brighton, BN1 9RH, ...
- Language: English (United Kingdom)

At the bottom right, there are "OK" and "Cancel" buttons.

Complete the details required (make administrator if you deem it appropriate) in the USER DETAILS window. Then choose the category appropriate for the User in the “contact Type” window.

NB: please be aware that the USER details are just for use in terms of portal and profile management. The email details the university holds for PO’s and queries is that set in the “ADDITIONAL INFORMATION” tab (Point 1 of this document). The address details are set by Point 2 of this document).