Better value, delivered.

YPO Rebate Portal

Supplier User Guide

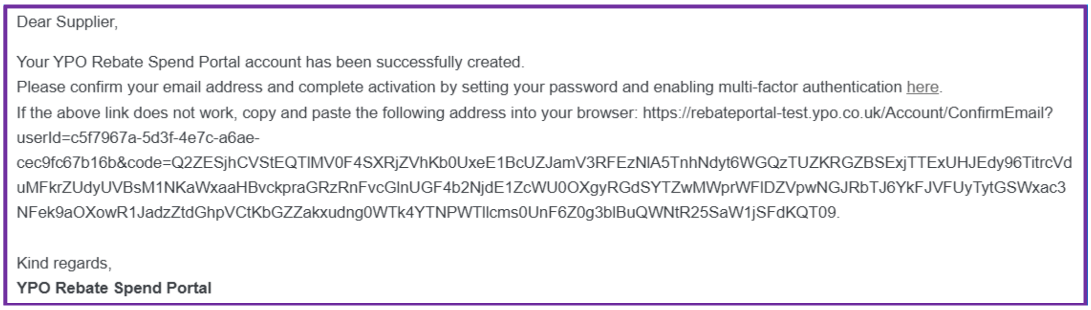
March 2026

Contents

1. Login details

1.1 Login Details

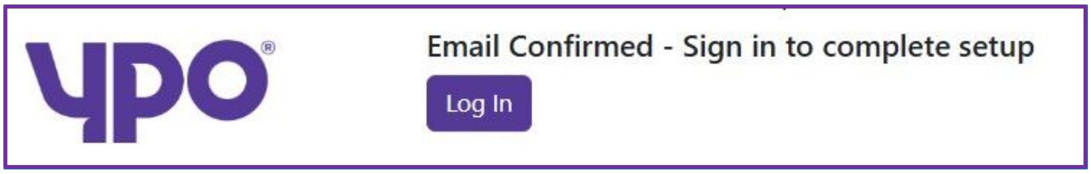
Once your account has been set up on the rebate portal, you'll receive an email from **rebateportal@ypo.co.uk** with a link to set up a password and to access the rebate portal. Once you have created a password, you can login using your email address and password. You will also receive an email once successfully registered.



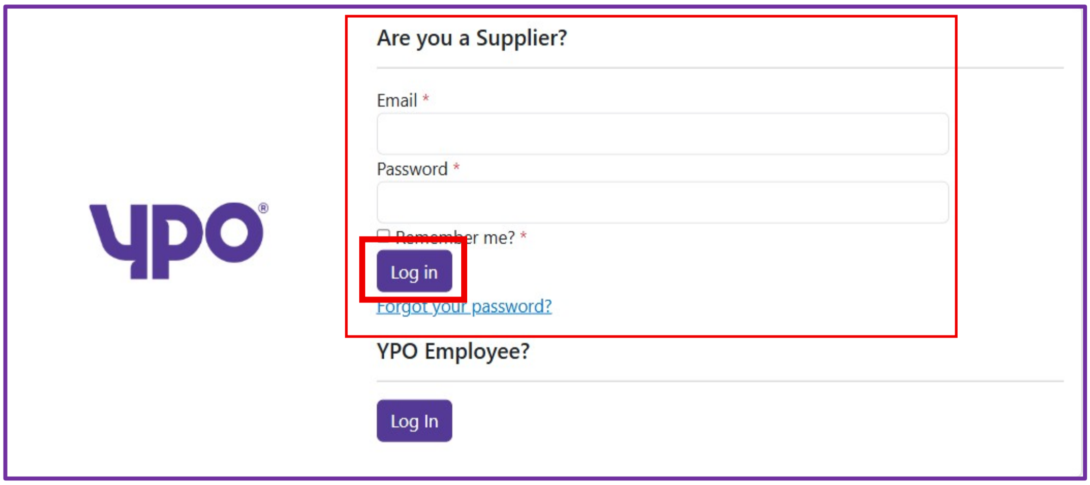
Dear Supplier,

Your YPO Rebate Spend Portal account has been successfully created.
Please confirm your email address and complete activation by setting your password and enabling multi-factor authentication here.
If the above link does not work, copy and paste the following address into your browser: https://rebateportal-test.ypo.co.uk/Account/ConfirmEmail?userId=c5f7967a-5d3f-4e7c-a6ae-cec9fc67b16b&code=Q2ZESjhCVStEQTlMV0F4SXRjZVhKb0UxeE1BcUZJamV3RFEzNlA5TnhNdyt6WGQzTUZKRGZBSExjTTExUHJEdy96TitrcVduMFkrZUdyUVBsM1NKaWxaaHBvckpraGRzRnFvcGlnUGF4b2NjdE1ZcWU0OXgyRGdSYTZwMWprWFlDZVpwNGJRbTJ6YkFJVFUyTytGSWxac3NFek9aOXowR1JadzZtdGhpVCtKbGZZakxudng0WTk4YTNPWTllcms0UnF6Z0g3blBuQWNtR25SaW1jSFdKQT09.

Kind regards,
YPO Rebate Spend Portal



Use your email address and password to log-in, by filling out the 'are **you a Supplier?'** fields.



Forgotten Password

If you had a password but have forgotten it, click 'Forgot Password' button and the system will send you a link to reset it. You can also use this link if you want to change your password. The reset link will only be sent to the email address that's linked to your account.

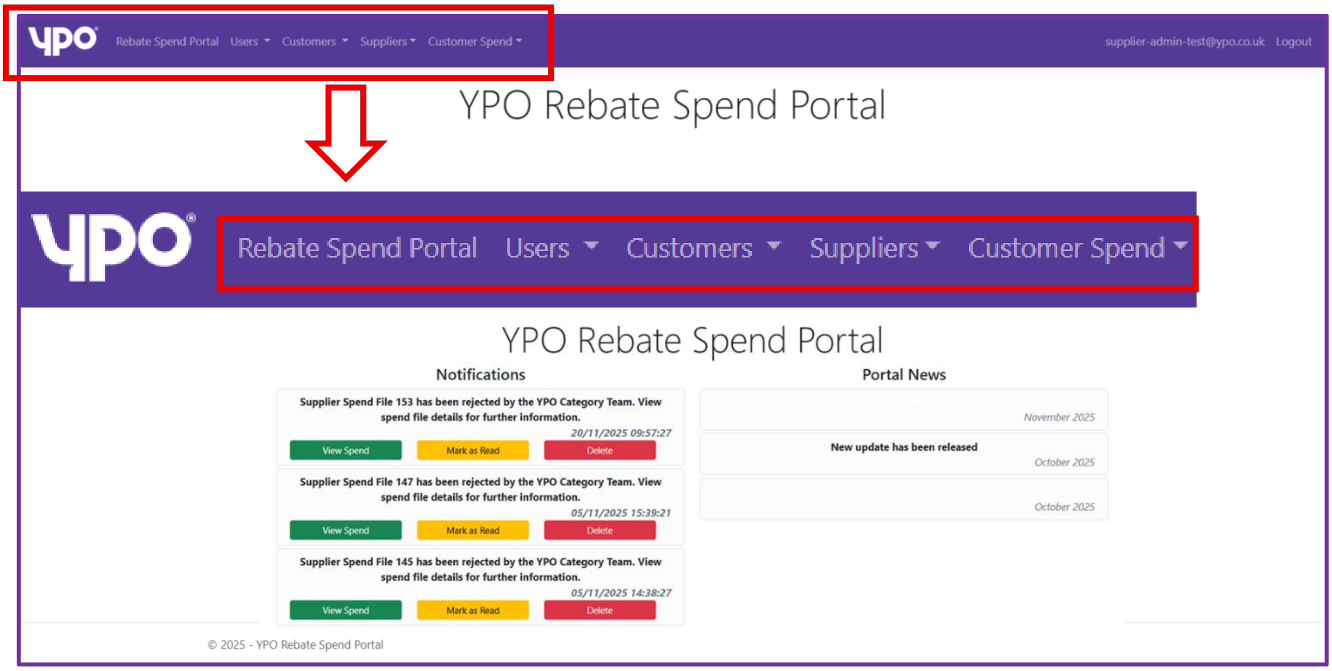
1.2 Updating your Email

If you need to update your email address, please contact the Category Team that manages the framework you're on.

2. Navigating The Rebate Portal

2.1 Basic Navigation

One you have logged into the rebate portal the home screen will be displayed. Use the drop-down menus to navigate the portal. There is a filter function built into the screens to assist. Filter



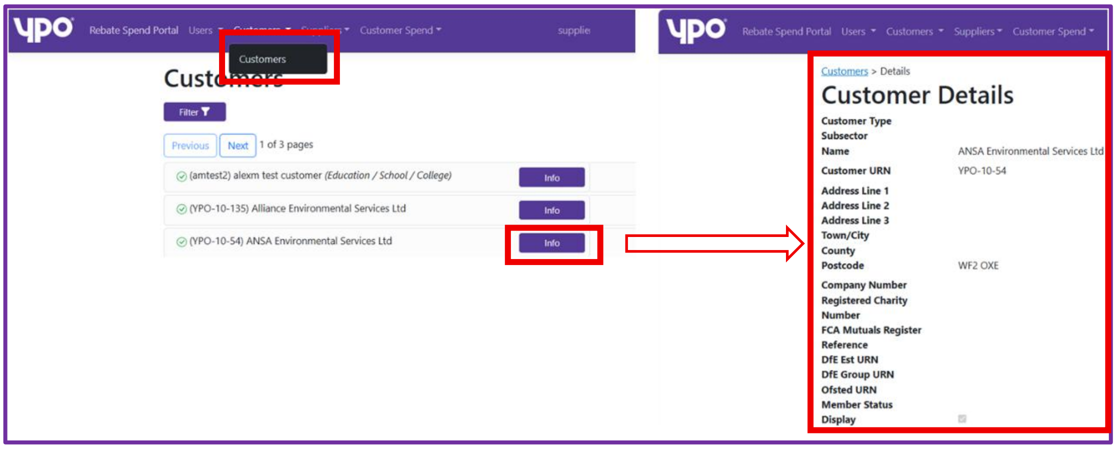
Here's a summary of the menus to help you navigate:

- **Customers** – view your customer details.
- **Suppliers** – view your supplier agreements.
- **Customer Spend** – access to awaiting approvals, rejected uploads, credit memos, 'Nil spend' customers, all customer spend and upload customer spend **(Sales Invoices Data)** to the rebate portal.
- **Notifications:** Shows any spend uploads rejected by your Category Team. You can View Spend, Mark as Read or Delete. If an uploaded spend file has been **rejected** or **invoiced** by your category team you will receive an **email notification**.
- **Portal News:** Displays updates and information posted on the portal.

3. Customers Tab

3.1 Cutomers

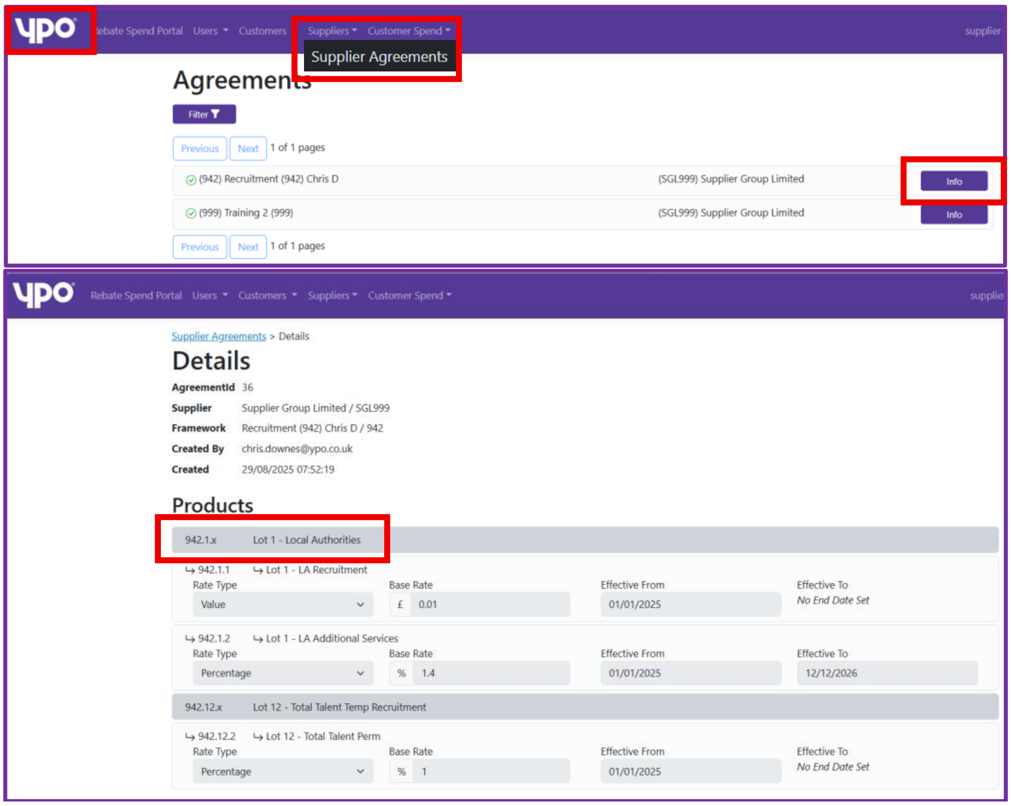
Please the **Customer** tab. Select **Info** to view customer details including URNs.



4. Suppliers Tab

4.1 Suppliers

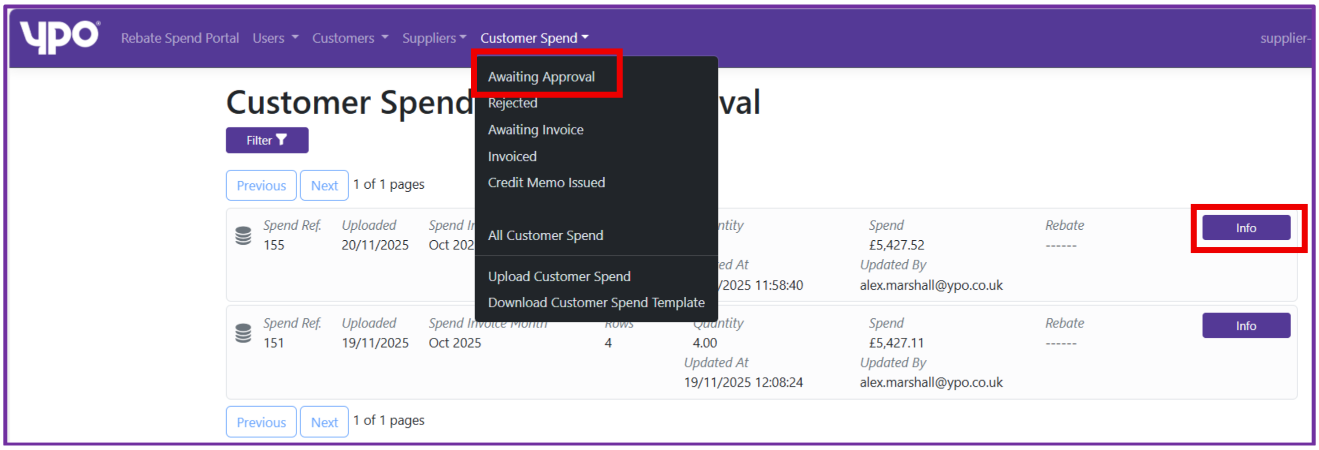
Please select the **Supplier Agreement** tab. Select **Info** to view the products that you have been set up against.



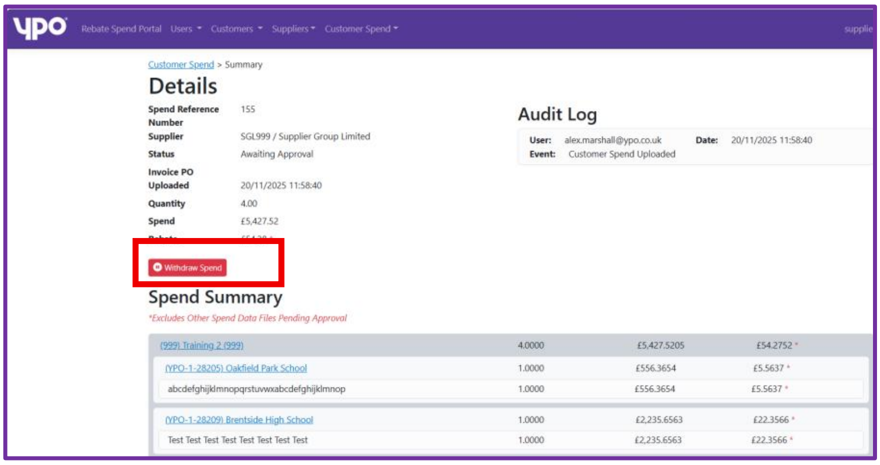
5. Customer Spend Tab

5.1 Awaiting Approval

Please select the **Awaiting Approval** tab, these are your uploads yet to be approved**.** Select **Info** to view the pending approvals in more detail.

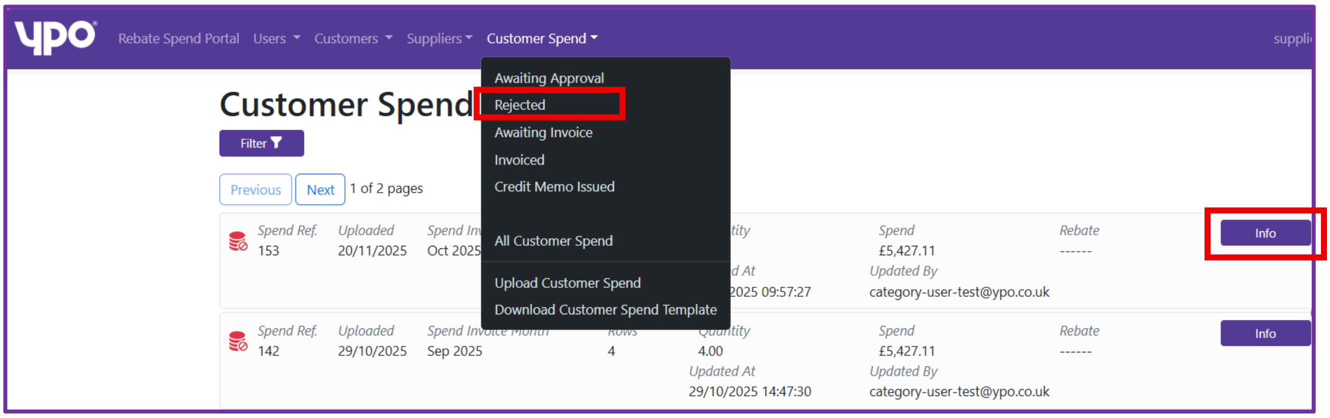


If required, you can withdraw your data. By selecting the hyperlink (light blue text) it will open your customer details in more detail.

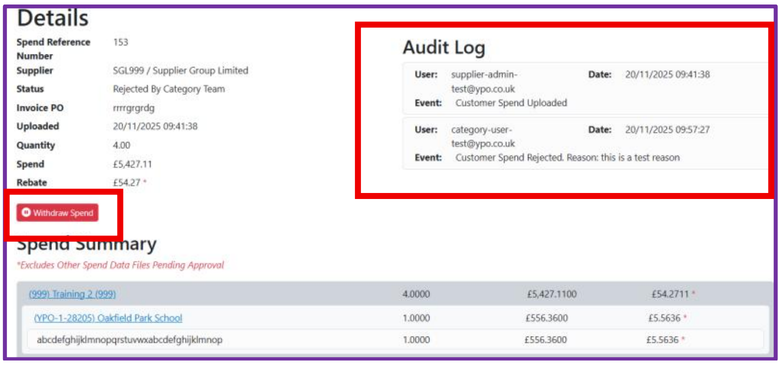


5.2 Rejected Uploads Tab

Please select the **Rejected** tab these are your uploads that have been rejected and where applicable need to be resubmitted. Select **Info** to view your rejected upload data in more detail.

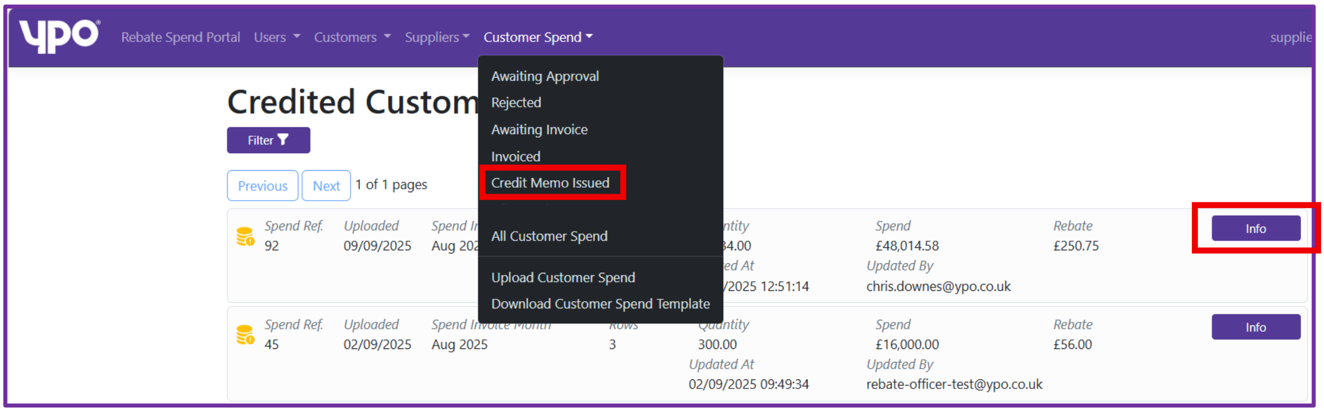


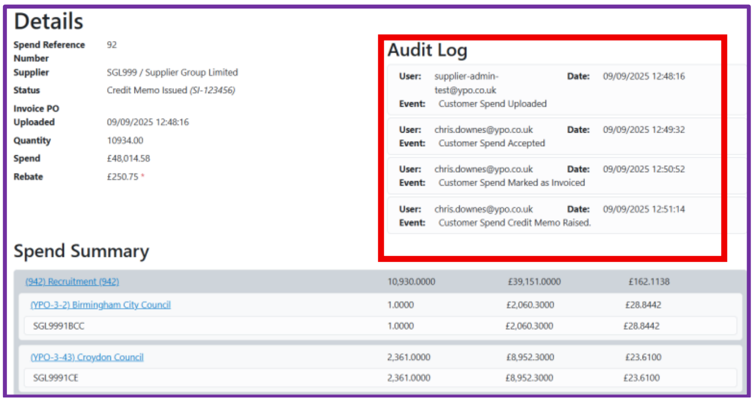
The reason for the rejection can be found in the audit log and where applicable the withdraw button will be available.



5.3 Credit Memo Issued Tab

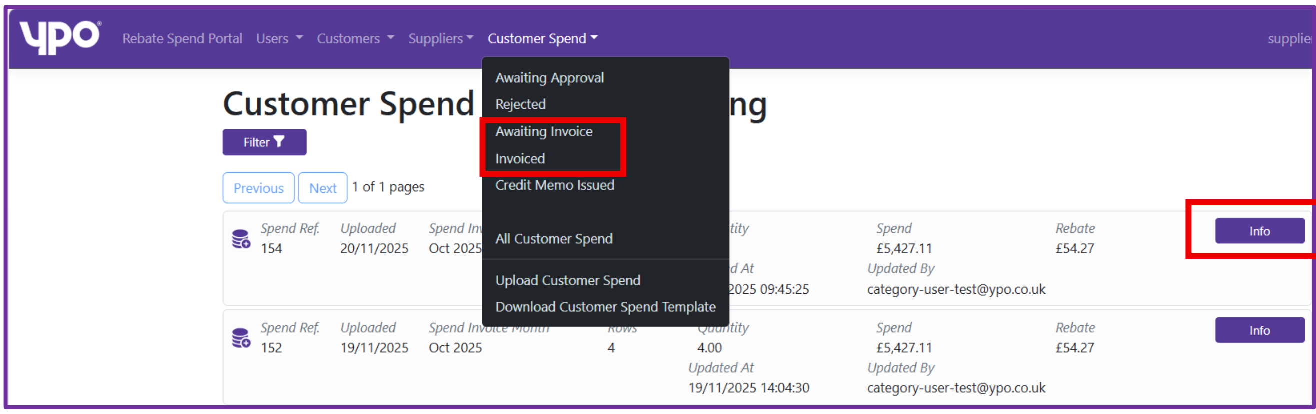
Please select the **Credit Memo Issued** tab these, are credits that have been issued. Select **Info** to view your credit memo info in more detail.



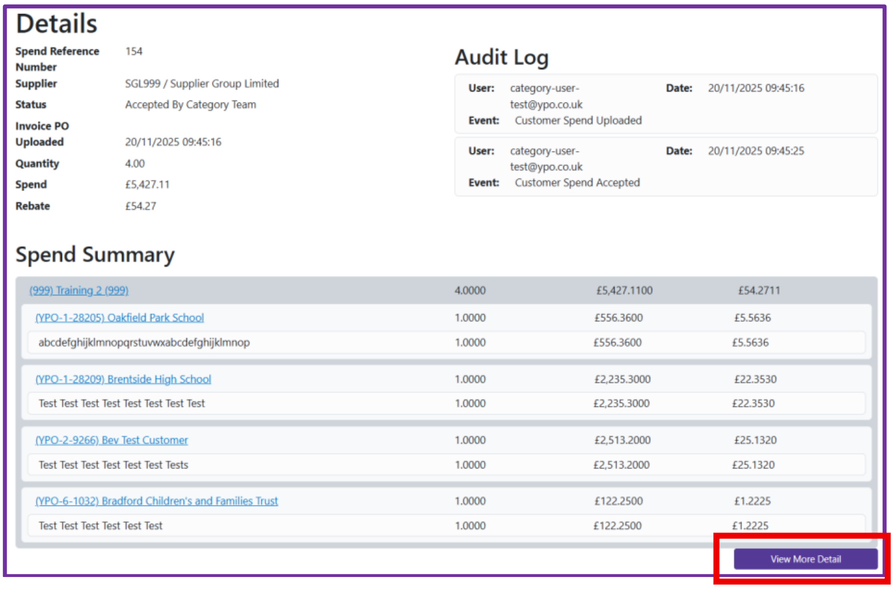


5.4 Awaiting Invoice & Invoiced Tabs

Please select the **Awaiting Invoice** or **Invoice** tab, these are your uploads that will be or are already invoiced. Select **Info** to view your invoice upload data in more detail.

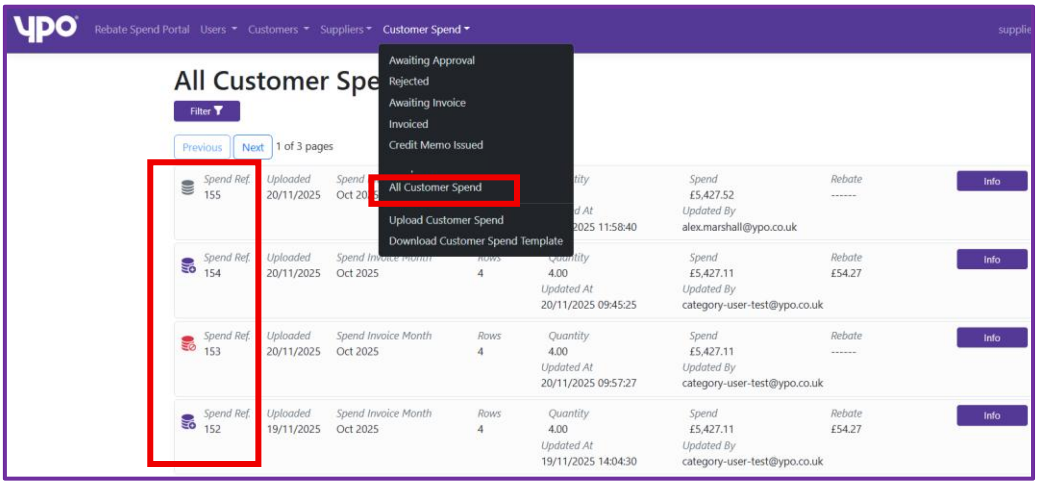


Select **View More Details** to view further spend data.



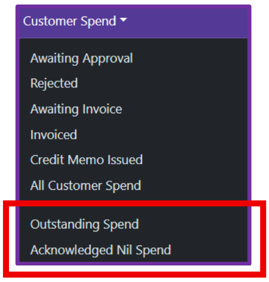
5.5 All Customer Spend

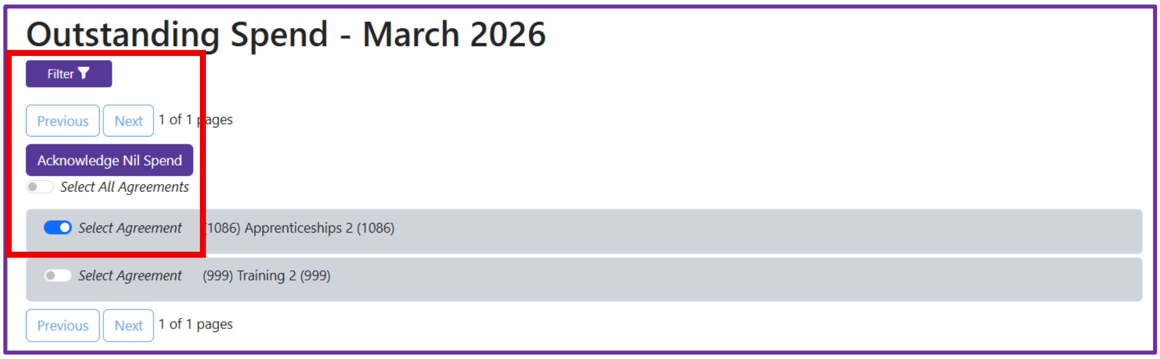
By selecting **All Customer Spend**, all details of your uploads are displayed on one screen.

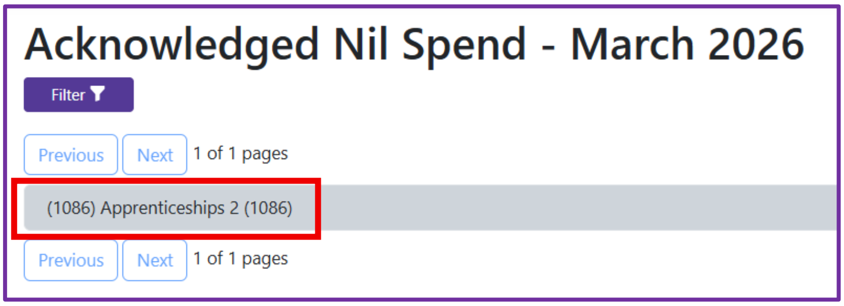


5.6 Outstanding Spend & Acknowledge Nil Spend

Outstanding Spend – Displays all frameworks with no spend recorded for the current month. Use the **Filter** to select different months or frameworks as needed. To acknowledge nil spend, switch on the **Select Agreement** toggle, then choose **Acknowledge NIL Spend** to move to the Acknowledged Nil Spend menu.



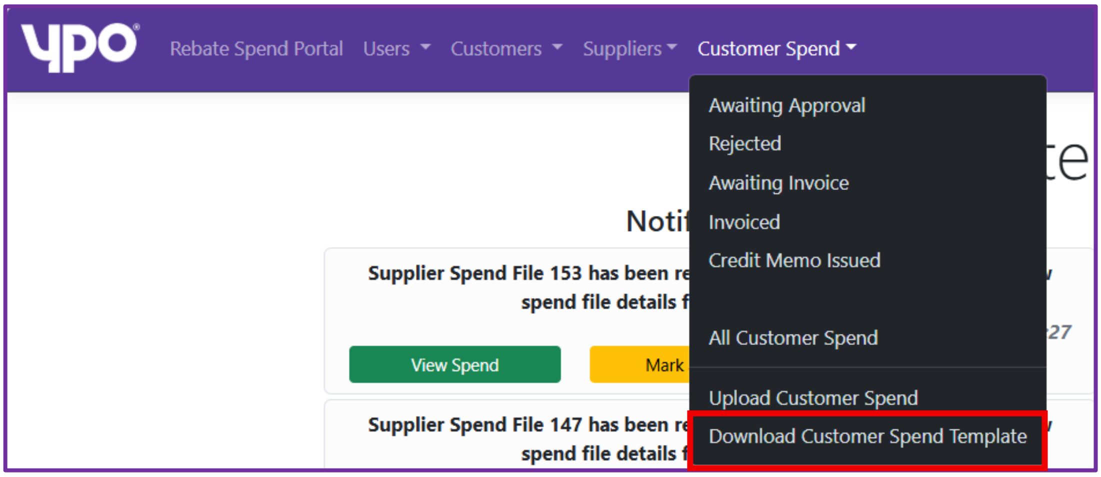




6. Preparing your data & Upload Customer Spend

*****When uploading the customer spend file, negative values cannot be included. Please do not amend any of the headers, as this will cause the upload to fail.*****

Select Download Customer Spend Template to download the CSV spend file.



How to Complete the Sales Invoice Data Template

The Sales Invoice Data template has 14 columns. All columns, except one, are mandatory. All columns (except date) need to be in the ‘General’ format.

Supplier ID
The six-digit reference we give you (e.g., ABC123). This needs to be added to every row of data.

Supplier Name
Name of your company. Needs to be added to every row of data.

Customer URN
The URN of the customer organisation. This can be found on the Customer URN List (in the Documents section). For example, the URN for Wakefield Council is YPO-3-32.

Customer Organisation Name
Name of the Customer Organisation. This can be found on the Customer URN List. Please <u>do not give names of individuals</u> (people), teams or delivery locations. We recommend you use the same name given on the URN List.

Invoice Date
Date of the invoice that you sent to the customer. Dates must be in the format DD/MM/YYYY.

Invoice Number
The invoice number that you sent to the customer.

	Do not use the same invoice number and invoice line number combination more than once. For example, the combination of Invoice Number 1234 and Line 1 can only be used on one occasion. It cannot be duplicated within the same document or future uploads.
Invoice Line	The line on the invoice that relates to the products / services provided as part of the framework. **(Numbers only)** Do not use the same invoice number and invoice line number combination more than once. For example, the combination of Invoice Number 1234 and Line 1 can only be used on one occasion. It cannot be duplicated within the same document or future uploads.
Framework Product Code	The code that relates to the products / services you are delivering as part of a framework (**NOT the Framework Ref**). Ensure you use the correct product code, or your rebate may be calculated incorrectly.
Apprenticeship Framework 1086	ST Codes are no longer required and to fill each line in the "Framework Product Code" column as 1086.1.0
Invoice Value (Net)	Total invoice value of each row on your template. Number format only (don't use the pound sign (£) or commas). You can use a decimal point.
Quantity	Quantity of products / services supplied to the customer e.g. (Hours/Units). If you haven't supplied a quantity, the number should be 1. Numbers only. You can use a decimal point.
UoM	Enter 'Each' on every row.
Currency	Enter 'GBP' on every row.
Project Ref	Project Ref that you gave on your Project Data.
Supplier Purchase Order Number	(Optional) If you would like us to use a Purchase Order number (or any other kind of reference) on the invoice we send to you, please include it in this column, for example, "Jan 24 Upload". If you want several rows of your upload to be included in the same Purchase Order, please make sure you include it on all the relevant rows. Any rows that don't have a Purchase Order added will be combined into one invoice. Only the first 16 characters of your PO Number will be shown on the invoice.

Example of a completed Sales Invoice Data template.

Customer URN	Customer Organisation Name	Framework Product Code	Invoice Date	Invoice Number	Invoice Line	Quantity	UoM	Invoice Value (Net)	Currency	Project Ref	Supplier Purchase Order Number
YPO-1-234	Example Council	1101.1.0	12/04/2024	Invoice123	1	1	Each	2751.67	GBP	TES001 Project 99	PO-25815-Apr
YPO-1-567	Sample Council	1101.1.1	13/04/2024	Invoice557	1	18.5	Each	3521.12	GBP	TES001 Project 100	
YPO-1-432	Demonstration Council	1101.1.2	13/05/2024	Invoice228	1	2.5	Each	462.31	GBP	TES001 Project 101	PO-11564-15/5/24
YPO-1-432	Demonstration Council	1101.1.3	18/05/2024	Invoice228	2	1	Each	27887.4	GBP	TES001 Project 102	

6.1 Tips for Completing the Templates

Columns and Rows

Please do not add or remove columns or change their names this will reject the data if it is not in the correct format. The columns can be in any order. The column headings must start on row 1 otherwise the file will be rejected.

Gaps in data

There should be no empty rows. Your data should start on the second row and continue with no empty rows until the end of your data. If you have empty rows, it will be rejected.

Exporting data from your own database

You may have your own database or system that allows you to export the relevant data in a **CSV format.** If you are using your own system, please ensure that your export includes all the columns, and that each column contains the correct information in the correct format.

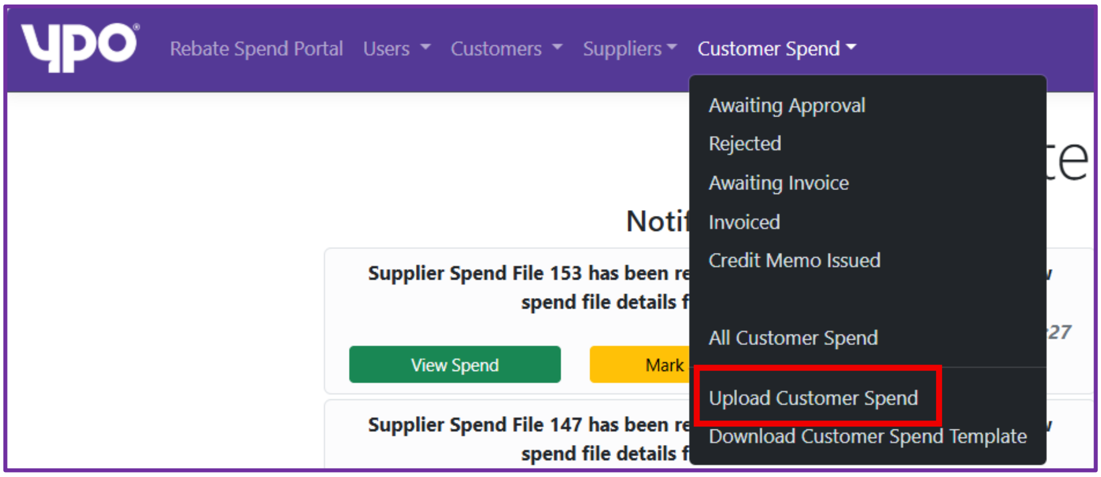
Entering data manually

If you are filling the template in manually, including copying and pasting, please make sure you delete any rows that previously had data in them (i.e. the entire row, not just the data). The portal can recognise rows that had data in them, and it may cause the upload to be rejected.

7. Uploading Your Data

7.1 Uploading Sales Invoice Data

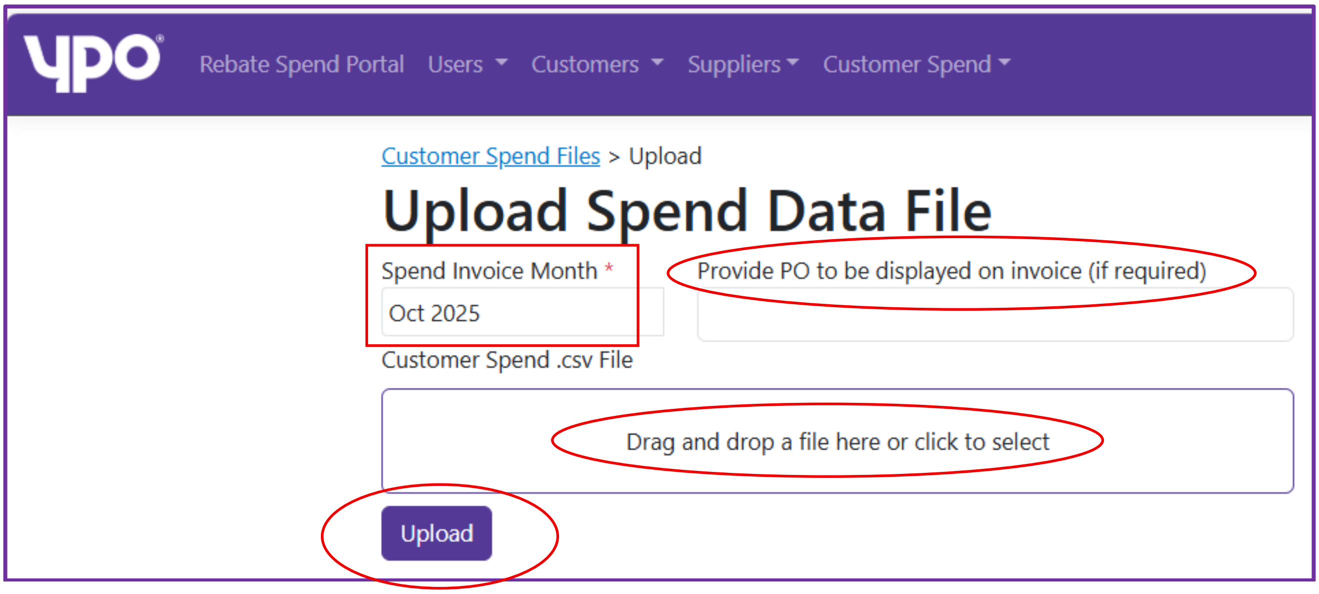
Step 1: Select **Customer Spend** and then **Upload Customer Spend**



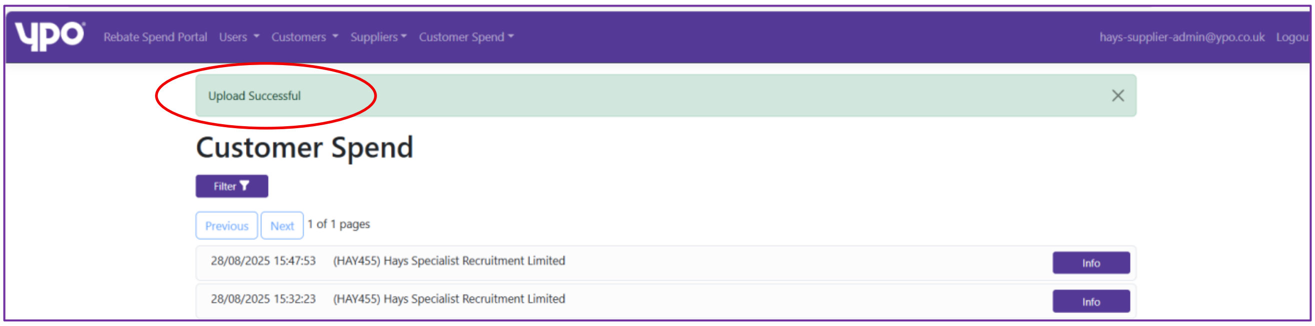
Step 2: Select or drag and drop the **Sales Invoice Data CSV file** and select **Upload**.

When uploading your spend file, you can add a **PO number or reference** (up to 15 characters). To change the invoice month, click the month and select a different date. This PO number will appear on the rebate invoice once processed.

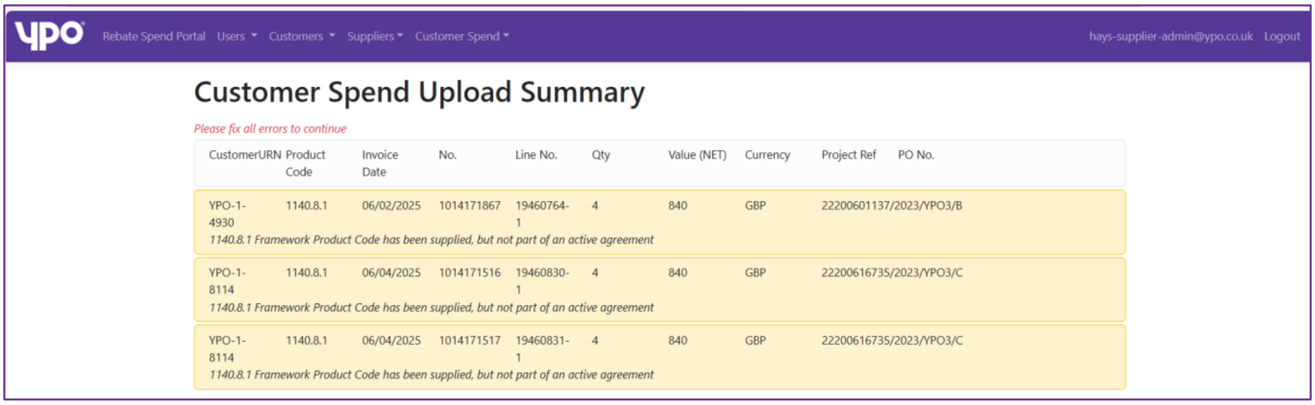
- **Important**: Only **one PO number** can be applied per invoice.
- If you need multiple PO numbers, you must upload a **separate spend file for each PO**.



Step 3: Once successfully loaded, this message will be displayed.



Step 4: If there are any issues with the file, please amend the CSV file and resubmit.



Customer Spend Upload Summary

Please fix all errors to continue

CustomerURN	Product Code	Invoice Date	No.	Line No.	Qty	Value (NET)	Currency	Project Ref	PO No.
YPO-1-4930	1140.8.1	06/02/2025	1014171867	19460764-1	4	840	GBP	22200601137/2023/YPO3/B	
1140.8.1 Framework Product Code has been supplied, but not part of an active agreement									
YPO-1-8114	1140.8.1	06/04/2025	1014171516	19460830-1	4	840	GBP	22200616735/2023/YPO3/C	
1140.8.1 Framework Product Code has been supplied, but not part of an active agreement									
YPO-1-8114	1140.8.1	06/04/2025	1014171517	19460831-1	4	840	GBP	22200616735/2023/YPO3/C	
1140.8.1 Framework Product Code has been supplied, but not part of an active agreement									

Frequently Asked Questions

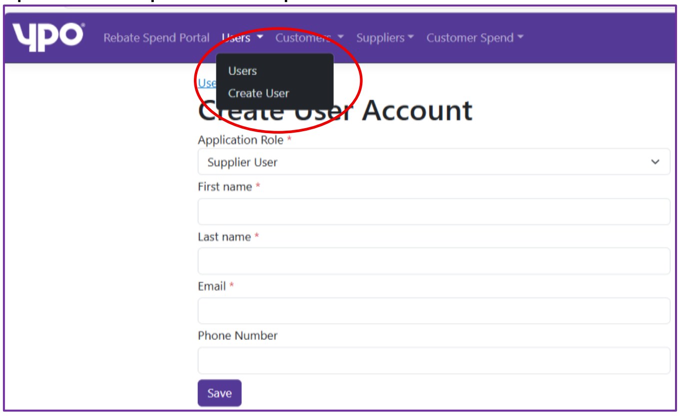
8.1 FAQ's: Registering and Using the Rebate Portal

How do I register?

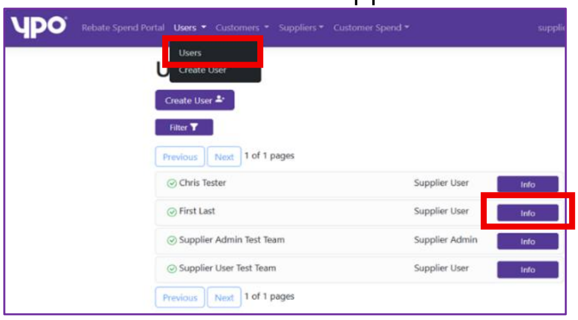
We need to set you up before you can use it. Once we've set up your login, you'll receive an automated email from **365service@ypo.co.uk** with a link to create a password.

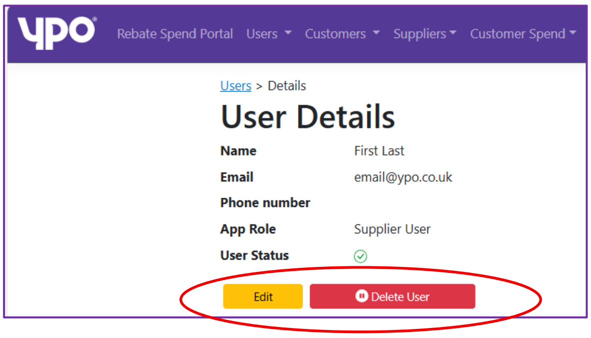
Can we have more than one person allocated to access to the Rebate Portal?

Yes, if you need more people to have access this can be done via the **User menu** and then **Create User** tab. An email will be sent to the new user (see step 1.1) To ensure data compliance, please do not share accounts; each person required to upload data should have their own account.



You can also amend/deleted users as required via the **User menu tab.** Select **Users, Info** to access these functions. Please note only Supplier User can be amended/deleted. Please contact your category team for assistance with Supplier Admin accounts.





What happens if I forget my password?

If you forget your password, please use the 'Forgot Password' button on the login screen and an email you a link to set up a new password. Once you have set up your password for the first time, we're unable to resend the link; if you need to change your password, you need to activate this yourself using the 'Forgot Password' button.

I no longer have access to the email account that's registered on the Rebate Potral .

If you need to change your email, please let the relevant Category Team know. We will deactivate your previous login and set a new one up for you.

8.2 FAQ's: The CSV Templates

Can I upload my data using a different file format?

A CSV file is the only way that we can accept your data. We use CSV format because it enables all suppliers to upload without needing to any specialist or expensive databases. This is particularly important for the Small and Medium-sized Enterprises (SME's) suppliers that we have on our frameworks.

Do I have to use the CSV templates?

The CSV templates set out the names of each column. You are welcome to export data from your own database, or to start from scratch, if the data is in a CSV format, and you have included all the correct columns. It will reject files that are not in the correct file format, or which have extra columns, columns missing, or where the column names have changed.

Why can't I use the £ sign or other symbols / special characters in my CSV file?

The portal validates data as it enters the system; to do this it needs data to be in a consistent format. Please ensure that the data in each column is in the correct format and only contains the data requested, otherwise the system will reject it.

8.3 The Upload Process

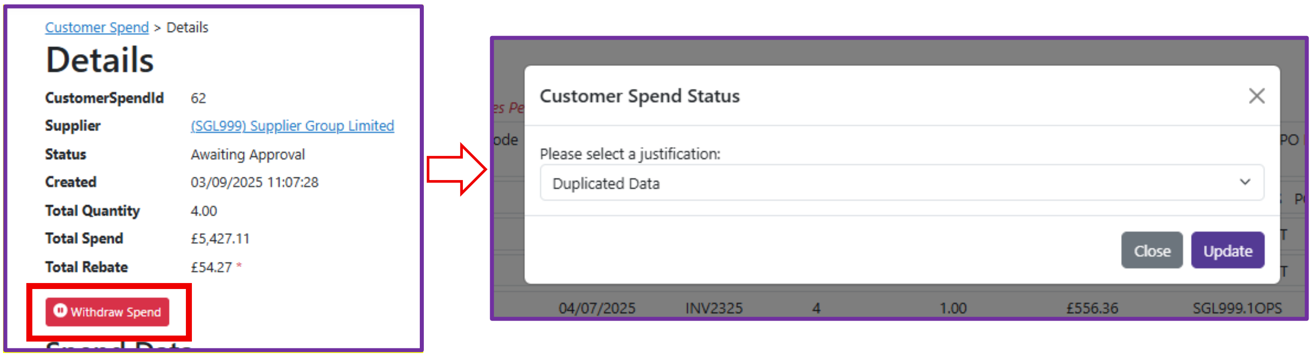
Can YPO do the upload for me?

No. All suppliers are accountable for their own data and this forms part of the Framework Agreement (contract) between you and YPO.

We are happy to guide you through the process, but it is your responsibility to ensure that data is uploaded, that it is accurate and done in a timely manner.

What should I do if I've uploaded the wrong data?

If you realise that you have uploaded the wrong data, you have until the data has been accepted to withdraw your spend. You can do this by choosing '**Info**' on your incorrect spend file and by clicking **Withdraw Spend**.



If the incorrect file has been accepted before you had chance to withdraw it, please contact the relevant Category Team as soon as possible and they'll take any necessary action and/or advise you of what to do.

What should I do if I've given the customer a refund?

Sometimes it may be necessary for you to refund customers. When this happens, we will need to adjust the amount of rebate due.

On your Sales Invoice Data you should include any credit notes / refunds issued. You enter these in the same way that you enter an invoice, but the value will be a minus figure. For example, if you have issued a credit note / refund to a customer for £1000. You would enter the credit note number in the Invoice Number column, and type -1000 into the Invoice Value column. The portal will recalculate the rebate due. Make sure you use the correct Product Code and Project Ref otherwise the rebate won't be recalculated correctly.

8.4 FAQ's: No data to report

What should I do if I have no data to report?

Simply log into the rebate portal and go to the Nil spend section. From here you can select which framework you require to submit nil spend against

9. Further Help / Contacting YPO

9.1 How to get further help

If you have a **non-technical** query, for example about a framework, need help in completing the **csv template**, have made an error on your upload, or need to update your admin email address, please contact the **Category Team** that manages the framework.