Commercial Finance Hub Guide

Contents

Terms of Use

Use of the Schools payment portals is subject to the terms outlined in the **Payment Policy**.
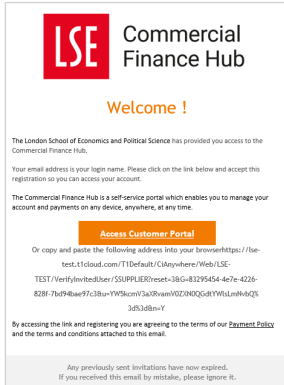
Access and registration

Commercial customers are automatically granted access to the Commercial Finance Hub.

Customers will be sent a Welcome email, this will include a link to the Hub together with instructions on logging on for the first time.
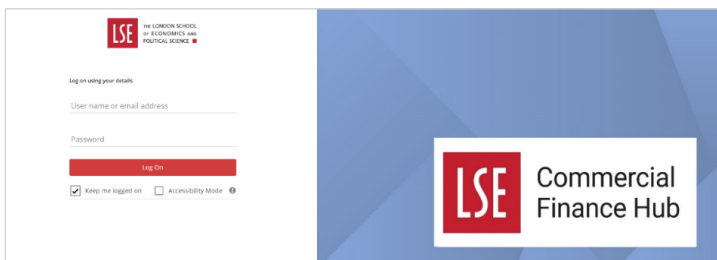
The 3 Step Process

Step 1: A copy of the Welcome and registration email will be sent to you, you should open and review the terms and conditions of use.

Step 2: Complete the registration by entering a new password and click ok.
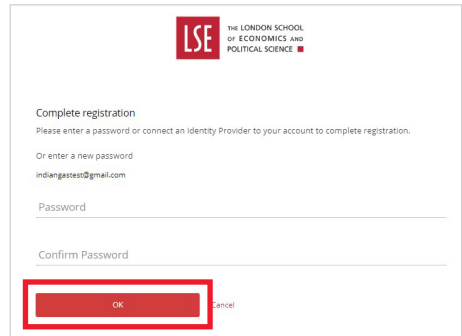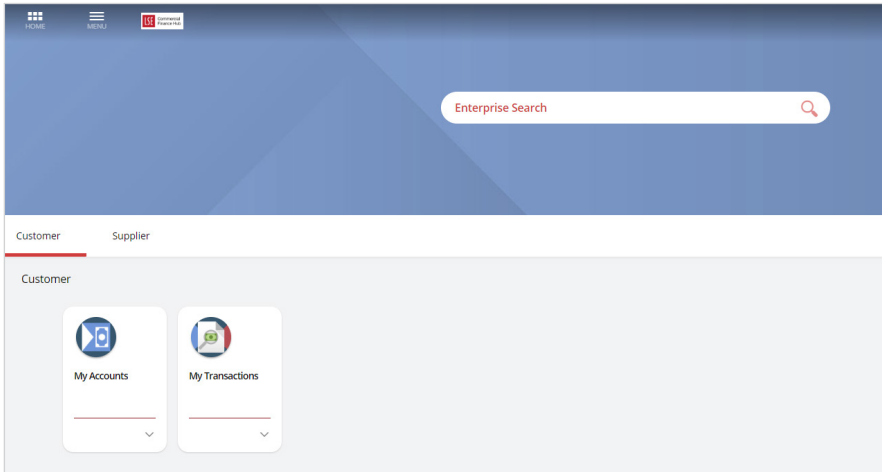

**Step 3**: You are now ready to access your Hub account.

Portal functionality

When you log on to the Commercial Finance Hub you will initially see two tiles, "My Accounts" and "My Transactions". You can move from Customer to Supplier and the options available to you will change. The system will indicate which tile you are on with a red line.

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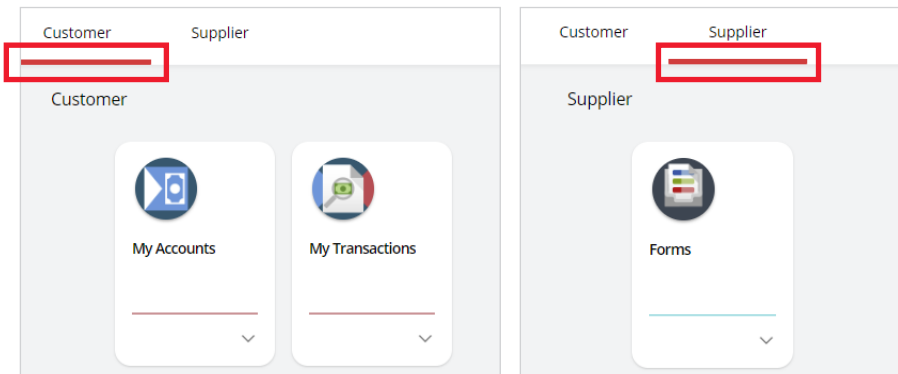
My Accounts

When you click on My Accounts, you will be presented with a list of accounts that you have access to, you can click on View button to access a more in-depth view of your account.

If you would like to look at your account transactions only you can select the down arrow, then transaction listing.

Account Summary:

This view includes charts detailing your outstanding invoices and recent payments (receipts). You can also view transactions in more detail by clicking on "View transactions".

Outstanding items

This view includes a list of your outstanding invoices, transactions details include:

- Transaction number (example: ARI005538).
- Date of transaction.
- Due date of the invoice.
- Age of invoice (example >60Days).
- Allocated (this may be a receipt or a credit note) and outstanding amount.

Direct Debit

Please note that although there is a Direct Debit function in the portal, we do not currently offer this as a payment option.

Contact details

You can view and update your contact details via the option.

Statements

You can view statements that have been issued to you by navigating to the Statements section, per below.

Reminder letters

You can view a full list or reminder letters that have been issued to you, simply navigate to reminder letters, then click view.
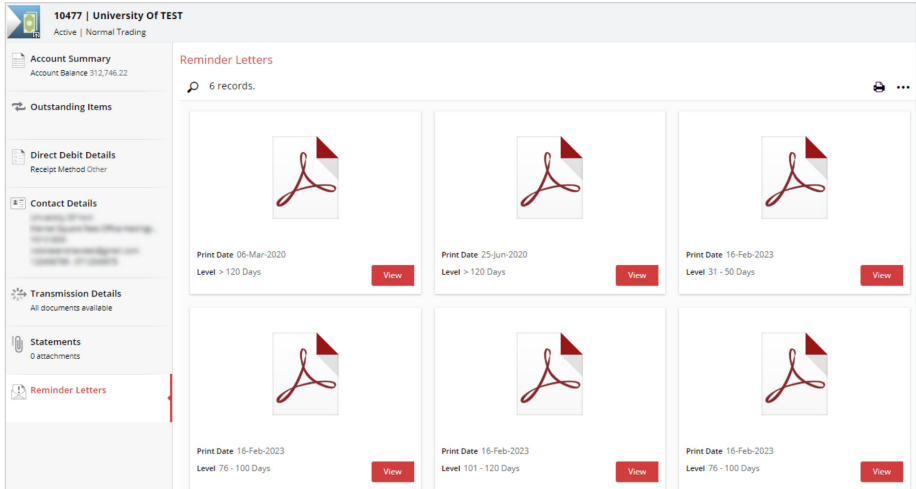
You can also download the reminder letter via PDF where required, once you have selected the reminder letter, click on the download arrow.
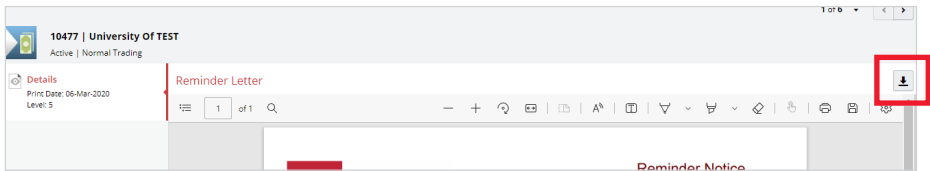
You can customise your view and how the columns are displayed by selecting the ellipsis button. You have the options to view your documents as grid or thumbnail view.

In the example below the grid view has been selected.

Thumbnail view:
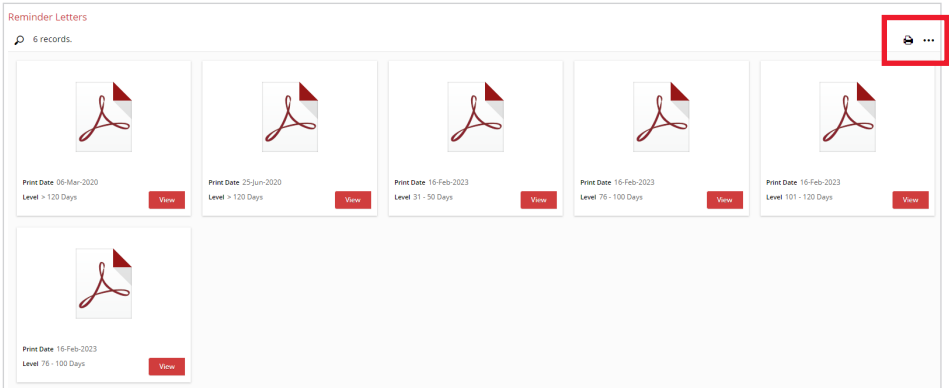
When in grid view you can also customise your columns, simply click on the ellipsis button and select Customise columns.

You can add fields all this is illustrated as option 1 below, or one by one, this is illustrated as option 2 below.

Making a payment

To make a payment you will need to navigate to "My Accounts".

Once you have selected "My Accounts", you must select "View".
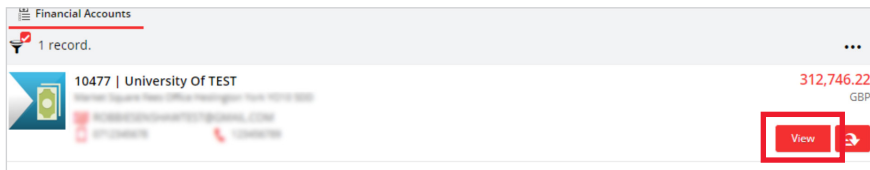
Then select Outstanding items
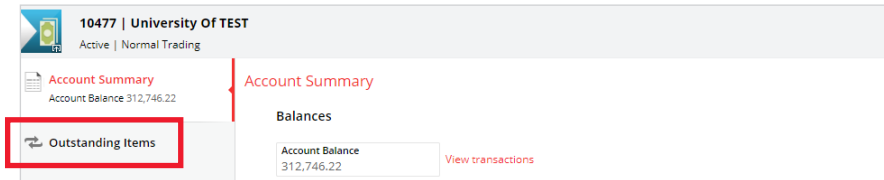
You can then select the invoices you wish to pay.

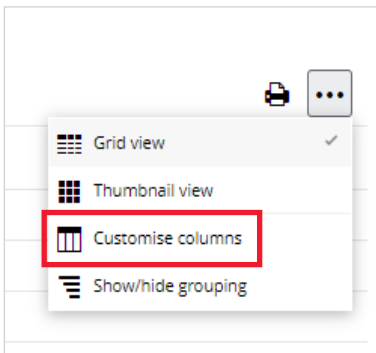If you elect to pay more than one invoice you will need to select your outstanding invoices by ticking the checkbox, then select the Pay Now button directly above your outstanding invoices, this is illustrated as option number 1 below. If you elect to pay a single invoice, you will need to tick the box next to the invoice then select the pay now button illustrated as option 2 below.

You can also make a "General Payment" on account, you would use this option if an invoice has not yet been issued. This process is illustrated as option 3 below.
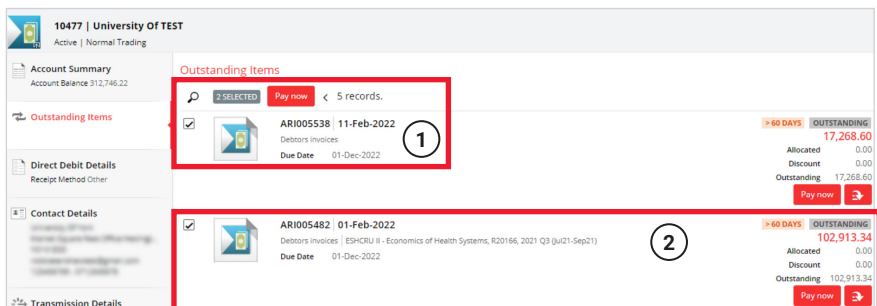
If you elect to pay more than one invoice, an aggerated total will be passed through to our Payment Service provider **Convera**.

In the example below the customer has elected to pay for multiple invoices ARI005538 and ARI005482 – total £120,181.94. The Pay now button (1) should be selected.

The aggregated total is passed through to the secure Convera portal, you are now required to enter the country you are paying fees from, then select Get a quote.

Step 1: You will be asked to choose a way to pay, select the appropriate option.

Step 2: We will pass through details about your organisation to Convera, so you will not be required to enter this information. There are some fields which required to complete, once you have keyed this information you should click on the "Proceed to payment" button.

I agree to the <u>Terms of Use</u> and have reviewed the <u>Online Privacy Statement</u> ✔

I would like to receive emails from Convera about future promotions and offers ✔

Proceed to payment

Step 3: You are now ready to download the payment instruction or make payment direct from your bank.

Step 3 of 3

3. Make Payment

⊘ Please print payment instructions and contact your bank or financial institution (online, phone or in-person).

⊘ Please initiate your payment as soon as possible.

Print Instructions

💡 Ensure funds are received by (16:15 pm 01/03/2023) so we can credit funds to your institution on time and in full.

💡 To ensure that your funds are received, the Reference Number must be included in your payment.

Note: Payments made to our bank account can only be received by bank transfer. Cheque or cash deposits will not be accepted and will not be returned to the sender. Funds received after the (48) hour cut off may be subject to a new rate. Custom House Financial (UK) Limited conducts business under the trading name Convera. This bank account is used to receive payments on behalf of your institution.

Return Tech1 LSE Demo ↗

Payment Details

THE LONDON SCHOOL OF ECONOMICS AND POLITICAL SCIENCE

Your reference	CAU1234579654
Tech1 LSE Demo will receive	120,181.94 GBP
You are paying	120,181.94 GBP

Once you have downloaded the instructions, you can proceed to make payment.

To return back to your Commercial Finance Hub Account after you have made payment, select the return button.

Help and contacting us

Email: **credit.control@lse.ac.uk**

Helpdesk: **https://lseapps.secure.force.com/form?formid=217915**

THE LONDON SCHOOL
OF ECONOMICS AND
POLITICAL SCIENCE ■

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