

Getting Started C365 for Suppliers



C365 Facilities Management System



Log-In as Supplier Admin

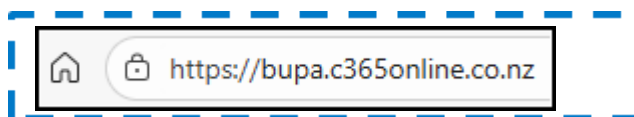
Performing Administrator role as a Bupa Supplier requires key steps set out in this Guide.

1

From your **browser** navigate to
<https://bupa.c365online.co.nz/>
to view the login page



1



2

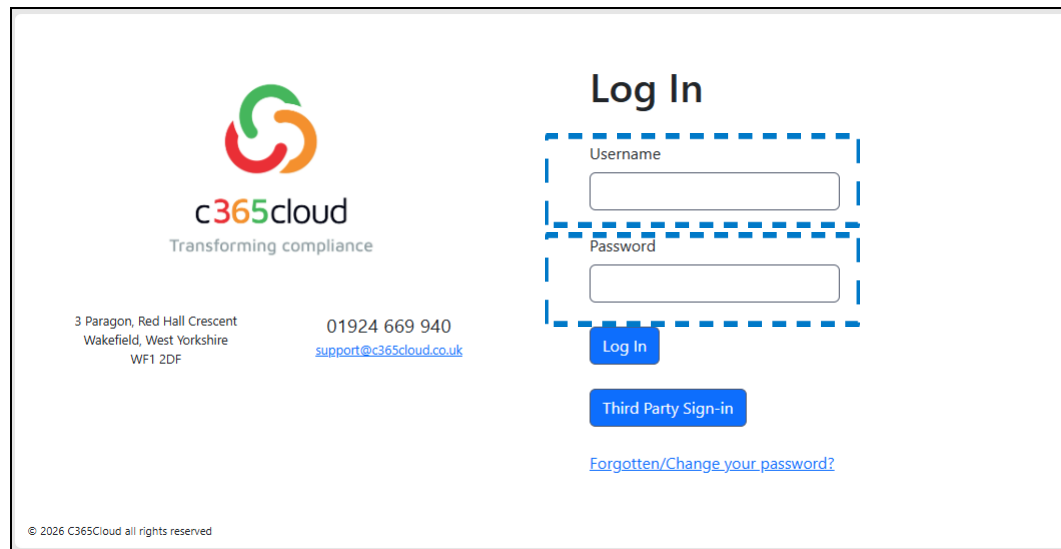
From the login page enter Username and Password and click Log In

First Time Logging In

Enter the sign in details supplied by the Bupa Team



2



The screenshot shows the c365cloud login interface. On the left is the c365cloud logo with the tagline 'Transforming compliance' and contact information: '3 Paragon, Red Hall Crescent Wakefield, West Yorkshire WF1 2DF', '01924 669 940', and 'support@c365cloud.co.uk'. On the right is the 'Log In' section, which includes a 'Username' field, a 'Password' field, a 'Log In' button, a 'Third Party Sign-in' button, and a link for 'Forgotten/Change your password?'. The input fields and the 'Log In' button are highlighted with a dashed blue border. At the bottom left, there is a small copyright notice: '© 2026 C365Cloud all rights reserved'.

User Guides

Once logged in, the left menu provides you with this view. You will have access to support material:

3

Knowledge – where to find User Guides

3



Logout Helpdesk Contractor Admin -

20 March 2026

Property Group: All Groups

Property Search

Knowledge

User Guides

Helpdesk

Helpdesk Requests

User Guides

Files

Name	Size
Action Management.pdf	2MB
Basic System Navigation.pdf	1MB
Compliance (PPM) Management.pdf	2MB
Helpdesk Admin Functions.pdf	3MB
Helpdesk Job Details.pdf	4MB
Helpdesk Job Status.pdf	2MB
Helpdesk Quotes.pdf	6MB
Reporting in C365.pdf	2MB

Support Portal

Tasks performed in Helpdesk Request Section

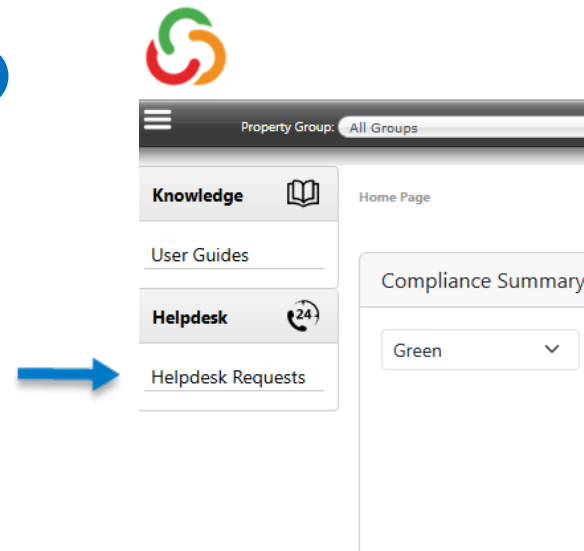
4

All Supplier tasks in C365 will be performed under the **Helpdesk Requests** item.

Supplier tasks are specific to the type of work performed, work will usually include:

1. Receiving Work Orders
2. Accepting and Completing a Work Order
3. Uploading Certificates (PDF)*, Proformas, Photos and Additional Supporting Evidence
4. Submitting a Worksheet, including chargeable items
5. Manage work requests, review and accept jobs, complete work orders, submit worksheets

4



C365 Helpdesk Request Section

5

Helpdesk Requests (under Helpdesk), is where you view **Helpdesk Requests** and **Quotes**, sent from Bupa.

The different statuses listed, shows where the request is queued in the process i.e. Accepted, Cancelled etc.

6

To view all jobs that require a quote, click on **Quotes Required**

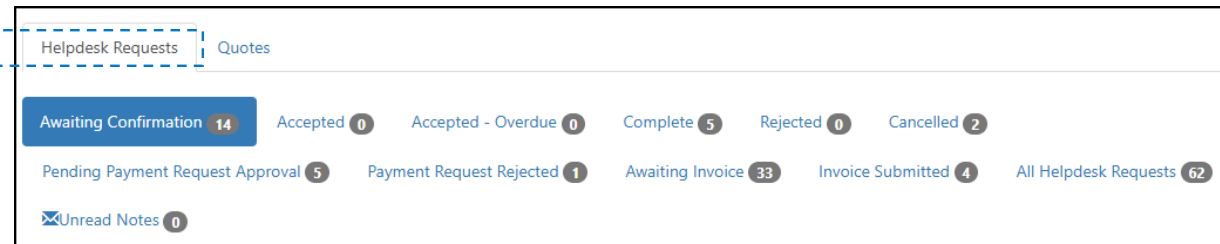
7

Note: Under each status category, you can export all jobs currently sitting in that status. using the **CSV button**.

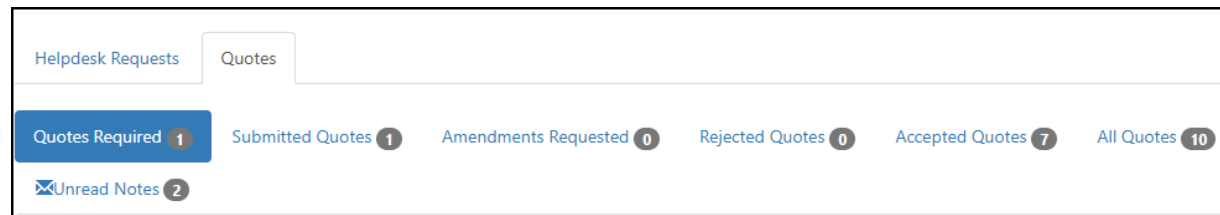


Jobs generated from Bupa will be sent through to you via C365, these are all located in **Helpdesk Requests**

5



6



7



Search Functionality

8

You can search, by status.
Input the job values in box/es & click **Search**.



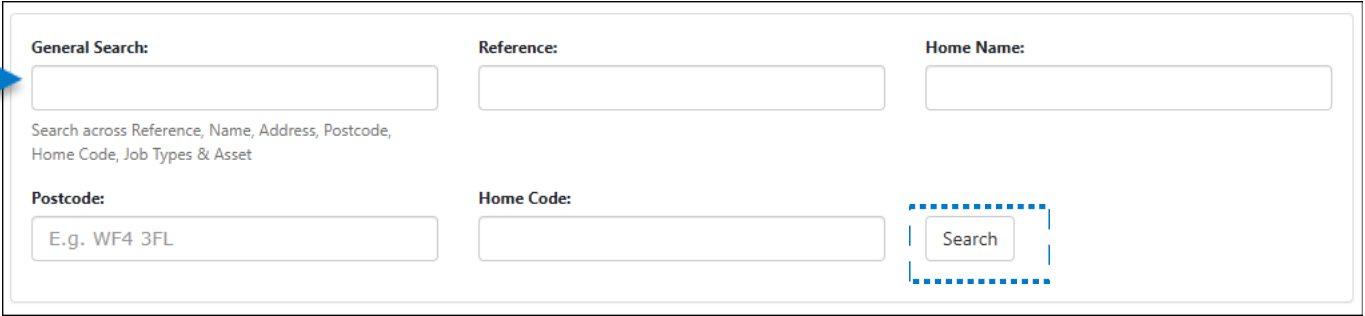
Hint: When searching for a Job, go to General Search and enter job number & click Search

9

To sort or to **reorder the list**, click the column header.

Example: The screenshot shows that the list is currently being sorted by the Reference column.

8



General Search:

Reference:

Home Name:

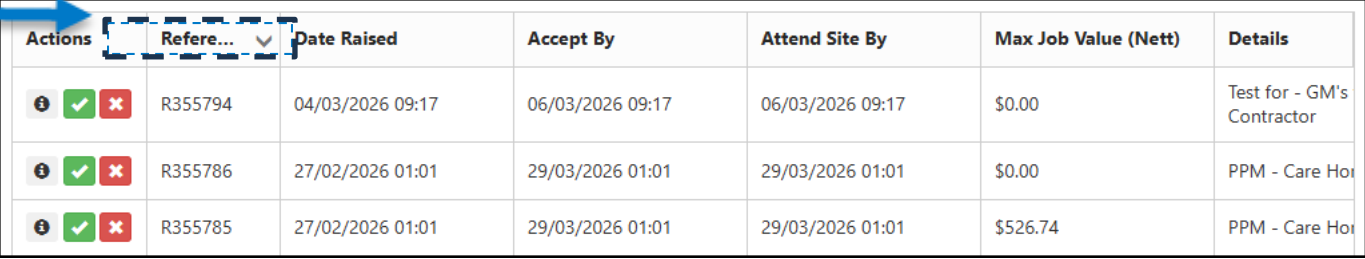
Search across Reference, Name, Address, Postcode, Home Code, Job Types & Asset

Postcode:

Home Code:

Search

9



Actions	Refere... ▾	Date Raised	Accept By	Attend Site By	Max Job Value (Nett)	Details
	R355794	04/03/2026 09:17	06/03/2026 09:17	06/03/2026 09:17	\$0.00	Test for - GM's Contractor
	R355786	27/02/2026 01:01	29/03/2026 01:01	29/03/2026 01:01	\$0.00	PPM - Care Hor
	R355785	27/02/2026 01:01	29/03/2026 01:01	29/03/2026 01:01	\$526.74	PPM - Care Hor

Reviewing & Accepting a Job



C365 Facilities Management System



Reviewing a Job

1

Understanding the Job Details

To review the job click on this information box  This will provide job details.

TIP - Field definitions are shown below:

- Reference:** Job Number – will start with a letter R
- Raised:** When and who raised the job
- Type of Work:** PPM, Remedial, Reactive
- Expenditure Category:** Coding for Bupa
- Details of Repair:** Details of the job
- Location:** Location of the Job
- Job Type Description:** Job types pre-determined by Bupa
- Contact Details:** Contact Details of supplier
- SLA Completion:** Expected date of completion
- Notes and Files:** Any additional notes or files that Bupa attach to support the job

1

Actions	Reference	Date Raised	Accept By	Attend Site By	Max Job Value (Nett)	Details
  	R355786	27/02/2026 01:01	29/03/2026 01:01	29/03/2026 01:01	\$0.00	PPM - Care Home

Job Information - R355786

Reference: R355786 Raised: 27/02/2026 01:01:08 by BUPANZ Admin

Type of Work: PPM Expenditure Category: Repairs & Maintenance - Fire Protection & BWOF (405840)

Details of Repair:

PPM - Care Home -> Fire -> Quarterly Inspection

Max Value (Nett): \$0.00

Location:

Fergusson Care Home
654 Fergusson Drive
Upper Hutt
Wellington
5018

Job Type Description:

PPM - Care Home - Fire - Quarterly Fire Inspection -

☐ Trade Affected

☐ H&S

Contact Name:

PPM

Telephone 1:

1041

Telephone 2:

Email Address:

Access Time:

Service Level:

PPM Monthly

SLA Completion Date:

29 March 2026 01:01

Notes:

Add Note

0 unread notes

Files:

Accepting a Job

2

Go to the **Helpdesk Requests**, there is an **Awaiting confirmation** tab which lists the jobs sent to you.

You can accept to undertake the work by selecting the green tick box. 

Each job has three **Action Options**:

Click this to show you details



Click this to accept the job





TIP: You must accept a job using the green tick box, in order for your Onsite technician to view the job.

2

Actions	Reference	Date Raised	Accept By	Attend Site By	Max Job Value (Nett)	Details
  	R355786	27/02/2026 01:01	29/03/2026 01:01	29/03/2026 01:01	\$0.00	PPM - Care Ho

Accepting a Job

3

After selecting the Green tick icon 

A pop-up screen will need key details populated:

Populate: Expected arrival details, select 

Populate: Name of person attending

If details aren't known, click on **Accept**.

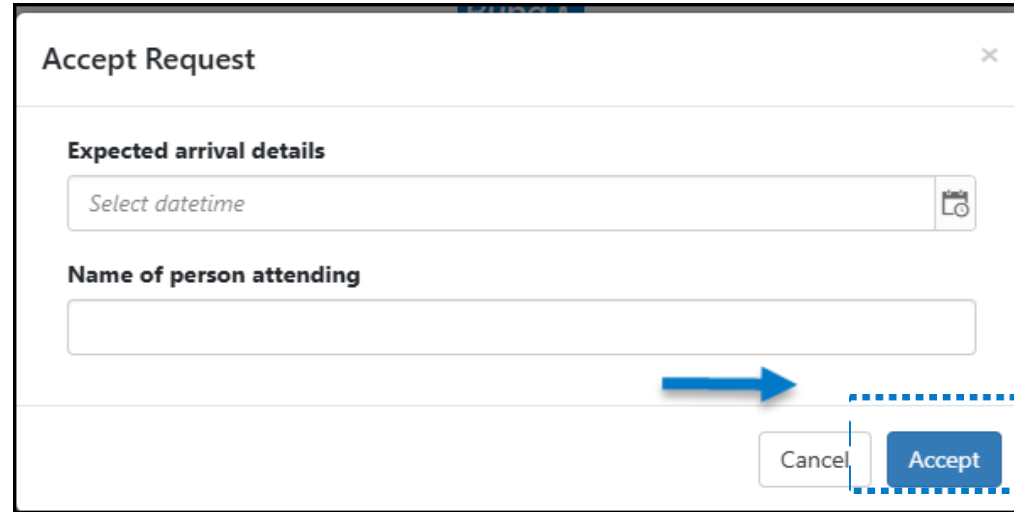
Once accepted, the job moves to a status
'Accepted' or 'Accepted – Overdue'

(depending on when the job was accepted).



TIP: By accepting this request your Onsite Technician can start the work, if this is not done the Technician is unable to see the work detail.

3



Rejecting a Job



C365 Facilities Management System



Rejecting a Job

- 1
- After selecting to reject a job, click  icon

A screen pops up, add the reason for rejecting the job, then click **Reject**

Once rejected the job will move to **Rejected** status.



TIP: You must note a rejection reason if you want to click the Reject button

1

Actions	Reference	Date Raised	Accept By	Attend Site By	Max Job Value (Nett)	Details
  	R355786	27/02/2026 01:01	29/03/2026 01:01	29/03/2026 01:01	\$0.00	PPM - Care Hor

Reject Request

Reason for rejecting

Cancel

Reject

Receiving & Completing Work Orders



C365 Facilities Management System



1

Completing Worksheet Details – if you have a contracted rate with Bupa the cost will come prepopulated.

Click  **green +** to add lines i.e.: Additional costs or material costs.

Suppliers can build a Materials library, select  'green +' Enter material name in the dropdown

NB –it will show the value for the last cost associated item entered relating to that material.

2

Max value is \$100.00, if it exceeds this amount, an uplift is needed by **Bupa onsite team**. They will add the extra lines required to create a PO.

NB: **Overall Total (Net)** box shows the total of the charges that suppliers want to be paid – amounts are GST exclusive.

If **Uplift** is needed, a **Note** must be added to Job Information > Notes section. This can be found by clicking 



TIP:

Tick box for Response Needed i.e. need Bupa to do something and not an FYI.

If a planned preventative job has a contract rate and max value is set and approved it will go through to **Awaiting Invoice**.

If its left unapproved it stays as **Pending Payment Request Approval**

Helpdesk Request Worksheet - R357251

Worksheet Details

Additional Details

Certificates

Operatives

Quantity

Operative Type

Start / End On Site

Sub-total Hours / Minutes

1

Helpdesk Contractor Admin - Bupa Test Contractor

07 September 2026 10:00:00

07 September 2026 13:30:00

3

30

Total Hours & Minutes:

3

30

1

+ Additional Costs



Description

Flat Fee

Quantity

1

Cost

\$100.00

Total

\$100.00

Additional Costs Total (Net):

\$100.00

+ Material Costs



Description

Search for materials.



Quantity

1

Cost

\$0.00

Markup

0

Total

\$0.00

Materials Total:

\$0.00

Overall Total (Net):

\$100.00

Maximum Job Value (Net):

\$100.00

2

Cancel

Save

Submit Worksheet

3

Certificates – key documents (Service Reports) have been templated (includes PDF and Proforma template).

NB: Uploading document steps are Supplier specific.
e.g: options Drag and drop or use the browse button to upload.
If correct document uploads it will go Green.
NB if upload is incorrect a red box appears.

Suppliers submit documents for certain jobs:
e.g: for planned preventative maintenance tasks PPM If you don't need to upload a certificate then that tab wont appear (refer to screenshot for **R358051** – doesn't show certificate tab).

4

Additional Details – to upload photos etc go to Additional Details tab. For some Suppliers you may not need to submit further information (hence the browse or drag and drop functionality is missing).

Submit for payment – If something hasn't been completed it wont let you submit worksheet (greyed out). Once everything has been provided the Submit Worksheet button will be able to be clicked.

3

Helpdesk Request Worksheet - R358259

Worksheet Details

Additional Details

Certificates

Upload Certificates:

Drop files or click to upload

Browse



Helpdesk Contractor Admin - Bupa Test Contractor - 02/10/2026 05:27:32

Demo Domestic EICR V1-54017.pdf

Cancel

Save

Submit for payment

4

Helpdesk Request Worksheet - R358051

Worksheet Details

Additional Details

Notes:

Files:


TIP:

Bupa Accepting Payment request
PO created and sent via email
PO will be POC then six numbers i.e. POC123456
Bupa rejecting payment request – goes to status
Payment Request Rejected.
Review rejection reason, make amendments,
click Submit for Payment again

Submitting a worksheet



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Submitting a worksheet

Under Helpdesk Requests, the Completed tab will be the jobs that have had site-based activity completed.

The payment request and/or evidence has not been submitted.

1

For each job you will have 2 Action options:



select this for the job information



select to open the Helpdesk Request Worksheet.

You can complete the payment request and/or upload supporting evidence.

2

In the Helpdesk Request Worksheet, three tabs exist:

- **Worksheet Details** – where the job costs will be populated.
- **Additional Details** – where any additional job information can be added
- **Certificates** – where you will upload any evidence i.e. certificates / service reports etc.

1

Actions	Reference	Date Completed	Current State	Details
 	R355617	29/01/2026 10:17	Complete	PPM - Care Home - Electrical - PAT Testing

2

Helpdesk Request Worksheet - R355617

Worksheet Details

Additional Details

Certificates

Reviewing and Submitting a Quote



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Quotes to be reviewed

1 Under **Helpdesk Requests**, you will see **Quotes** then **Quotes Required** tab. This shows any quote requests sent to you from Bupa. This needs you to **review and for you to** provide a quote for the work required.

2 For each job you will have 2 Action options
Select this to view **Quote Request**. You will be able to review and enter quote details

-  – Select this to accept the job
-  – Select this to decline the job

1

Helpdesk Requests

Quotes

Quotes Required 1

Submitted Quotes 2

Amendments Requested 0

Rejected Quotes 3

Accepted Quotes 0

All Quotes 0

Unread Notes 0

2

Actions	Reference	Date Raised	Response By	Current State	Details
	Q50627	24/03/2026 12:21	03/04/2026 13:30	Awaiting Quote	An example of a quote

Reviewing a Quote

3

Reviewing Quote Request

When you select the green button to view Quote Request, three tabs will appear: Details, Quote Entry and Additional Details

In Details Tab:

- **Reference:** Quote Number – will start with a letter Q
- **Raised:** When and who requested the quote
- **Type of Work:** PPM, Remedial
- **Details of Repair:** Details of what the job will be
- **Location:** Location of the Job
- **Job Type Description:** Job types that have been pre-determined by Bupa
- **Contact Details:** Contact Details of supplier contact
- **Service Level:** Priority 1, 2 or 3 etc.
- **Notes and Files:** Any additional notes or files that Bupa attach to support the quote

3

Quote Request - Q50627

Details Quote Entry Additional Details

Reference: Q50627 **Raised:** 24/03/2026 12:21:36 by Chaneen Bruckner-Iraia **Type of Work:** Remedials

Details of Repair:

An example of a quote

Location:	Contact Name:	Dave Smith
Test Property Test St 1010	Telephone 1:	
	Telephone 2:	
	Email Address:	
Job Type Description:	Access Time:	
PPM Remedial - Care Home - Doors - Access Controlled Doors -	Service Level:	Priority 2 (2 Days)
☐ Trade Affected ☐ H&S		

Notes:	Files:
Add Note	
🔔 0 unread notes	

4 Submitting a Quote

Once the quote entry details have been completed and you have attached any additional details, you can submit to send it through to Bupa to review.

5 Declining a Quote

To decline a quote, select this 

Another screen will pop up, note the reason for declining the quote, then click decline.



Note: You must note a Reason for declining first, before **Decline**.

4

Quote Request - Q50627

Details

Quote Entry

Additional Details

+ Operatives

Labour Costs

Rate Type

Default Quote Normal

Interval Rate

\$0 every 15 Minute(s)

Hours

0

Minutes

0

Labour Total (Nett):

\$0.00

+ Additional Costs

Description	Quantity	Cost	Total
Labour	2	\$50.00	\$100.00

Additional Costs Total (Nett): \$100.00

+ Material Costs

Description	Quantity	Cost	Markup	Total
Door Bracket	1	\$70.00	0	\$70.00

Materials Total: \$70.00

Overall Total (Nett): \$170.00

Cancel

Save

Submit

5

Decline Quote Request

Reason for declining

Cancel

Decline

6 Quote Entry

This is where to enter cost details for the Quote. select this icon to Add an extra Cost (e.g material or labour)

- **Additional Costs** – If contracted labour rates are not set up with Bupa, add Labour costs here.
- **Material Costs** – If any material costs are associated with the job you can note here.

Note: Suppliers have the ability to build up own library of materials. Click the Green Plus icon next to description to add a new item. It will remember the last cost that you have entered against that material.

If a cost has been added incorrectly, you can select this icon 

 **Operatives** – only to be added when rates are set up with Bupa. After key values are entered it calculate costs.

7 Additional Details

This tab is where you can submit any additional details to help support the quote i.e. drawings, PDFs etc.

6

Quote Request - Q50627

DetailsQuote EntryAdditional Details

Operatives

Quantity

1

Operative Type

Hours

0

Minutes

0

Sub-total Hours / Minutes

0

0

Total Hours & Minutes:

0

0

Labour Costs

Rate Type

Default Quote Normal

Interval Rate

\$0 every 15 Minute(s)

Hours

0

Minutes

0

Labour Total (Nett):

\$0.00

Additional Costs

Description

Quantity

1

Cost

\$0.00

Total

\$0.00

Additional Costs Total (Nett):

\$0.00

Material Costs

Description

Search for materials.

Quantity

1

Cost

\$0.00

Markup

0

Total

\$0.00

Materials Total:

\$0.00

Overall Total (Nett):

\$0.00

7

Quote Request - Q50627

DetailsQuote EntryAdditional Details

New Note:

Add Note

Files:

Drop files or click to upload

Browse

Helpdesk Requests and Quotes Statuses



C365 Facilities Management System



Helpdesk Requests and Quotes Statuses

Awaiting Confirmation	Jobs that have been sent out from Bupa for you to review and confirm you are able to undertake that work
Accepted	When a job that has been sent from Bupa has been accepted
Accepted – Overdue	When a job that has been sent from Bupa has been accepted but missed the SLA
Complete	A job that has had the site-based activity completed – payment request and evidence not yet submitted
Rejected	Jobs that have been sent out from Bupa and you have rejected
Cancelled	Jobs that have been sent out from Bupa and then subsequently cancelled by Bupa
Pending Payment Request Approval	When a job has been completed and payment request has been submitted to Bupa but pending approval
Payment Request Rejected	When a payment request has been rejected by Bupa. You will be able to make amendments and resubmit for approval
Awaiting Invoice	When a job has had everything processed and accepted. Invoices will be submitted through the current process.
Invoice Submitted	Not Applicable – Invoices are to be submitted through the current process. Emailed through to AP Invoices apinvoices@bupa.co.nz or processed through the Unimarket Supplier Portal
All Helpdesk Requests	List every single job that has been sent by Bupa at any point of time
Unread Notes	Method of communication between you and Bupa.

Quotes Required	Any quote requests that have been sent out from Bupa for you to review
Submitted Quotes	When a quote has been submitted by you but not yet accepted by Bupa
Amendments Requested	When a quote that has been submitted has been reviewed by Bupa and amendments requested
Rejected Quotes	When a quote that has been submitted has been reviewed by Bupa and rejected
Accepted Quotes	When a quote that has been submitted has been reviewed by Bupa and accepted
All Quotes	List every single quote that has been sent by Bupa at any point of time
Unread Notes	Method of communication between you and Bupa. This allows extra notes to be added and tracked, to ensure the other party has read the new note.

Logging In as a Technician onsite



C365 Facilities Management System



Logging In as a Technician

1 When you are physically on site, select camera from your device, hold up your mobile to scan the **QR code**.

2 After you scan the QR code, the login page will appear.

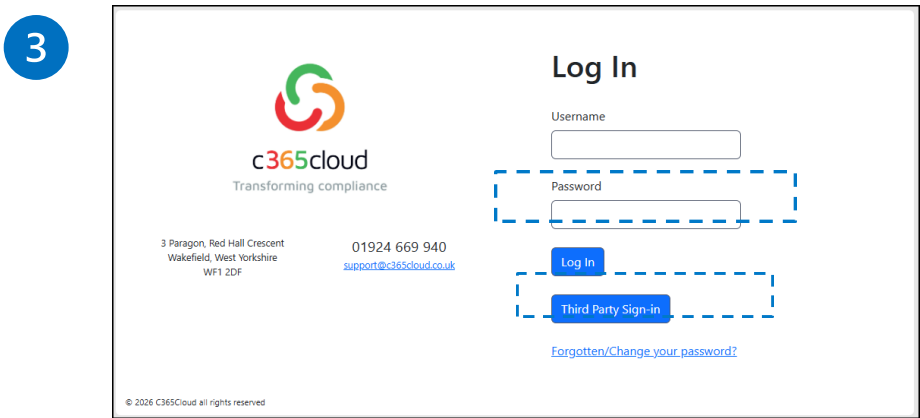
3 Enter **Username** and **Password**. Click **Log In**.

Once you scan QR Code, you will see the login page.
Enter **Username** and **Password**.

Click **Log In**.



 **TIP:**
If you do complete work at multiple sites, be aware the **QR code** is site-specific.



Attending a Job

Under **Helpdesk Requests** select **Accepted** or **Accepted - Overdue** tab for jobs sent from Bupa that have been accepted.

5 For each job you will have 4 Action options:

Click this to show job details 

Click when on site attending to the job 

Click if attended site, but need to reattend to finish 

Click if job is completed on site 

6 When you arrive onsite to attend the job 

When on site, and work has started click on the blue tick. Click on the calendar icon and select date / time work started on site, then click ok.

7 Attended job but need to reattend 

When on site and starting, but are unable to finish. You may need to reattend. Click on the amber tick. Complete each field to provide details to Bupa as to why you are needing to reattend then click ok.

8 Completed the job 

When the job has been completed click green tick. Click calendar icon & select date / time work completed. Click submit. Status will be Complete

5

Actions	Reference	Date Raised	Attend Site By	Date Accepted
   	R355786	27/02/2026 01:01	29/03/2026 01:01	20/03/2026 18:30

6

Site Work Started

Time Started on Site

Select datetime

OK

7

Attended Job - Need to Reattend

Time Started on Site

19 March 2026 09:00

Work Done So Far

Reason to Reattend

Expected Arrival

Select datetime

Name of Person Attending

OK

8

Complete Job

Time Finished on Site

Select datetime

Contractors who have not yet signed out will be signed out with this date and time.

Do you wish to submit a quote for further required works related to this job? Yes No

Submit



TIP: Before you select submit, a Quote can be submitted for further works related to the job.