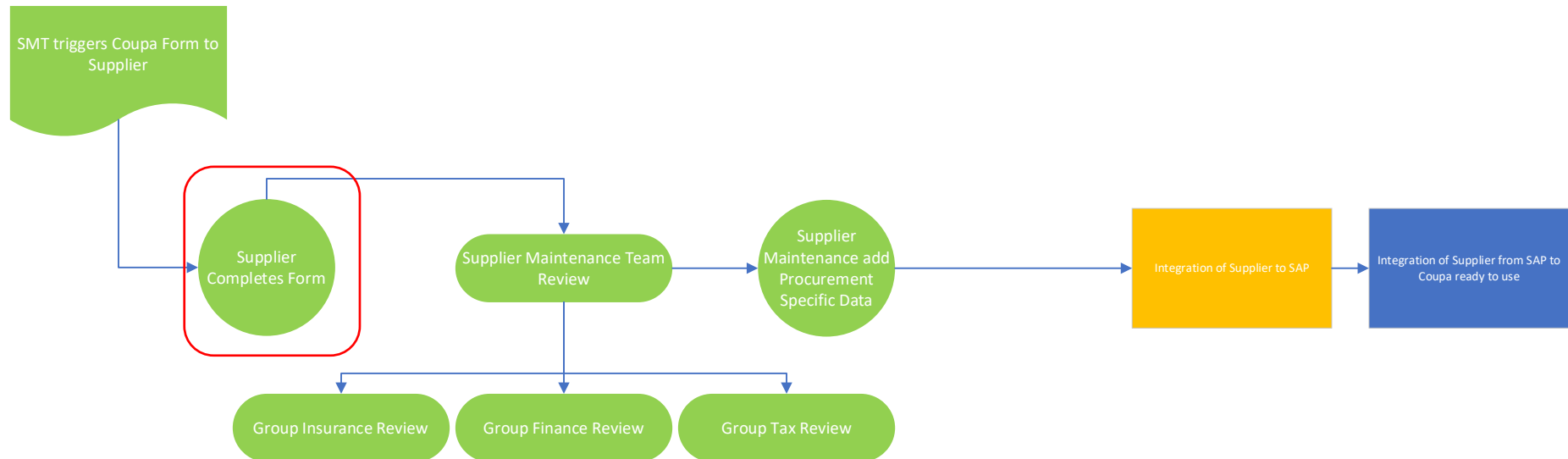# DSP – Supplier Onboarding

How to complete an External Form for Onboarding as a supplier (Acquisitions & Mobilisations)

This tutorial will help you create a new supplier record:

1. How to complete and submit an External Coupa Onboarding Form

Mitie use Coupa to onboard new suppliers as well as to maintain and amend existing Supplier details.

Receive the Coupa external onboarding Form

On identification as a suitable supplier your Mitie contact will verify your contact details before issuing out an external Coupa Form to help capture your details, and initial the onboarding process. Depending on the

Receive an email invitation to join the Coupa Supplier Portal('CSP'). The Primary contact receives an email invitation with a notification to Join Coupa, the primary contact who accepts the initial invite on the CSP will become the CSP Admin for your company. The email informs the supplier they are almost set up as a supplier for Mitie and they must join the Coupa supplier portal to complete the process. Suppliers _**must**_ Join the Coupa Supplier portal to transact with Mitie. When the primary contact clicks "Join and Respond" they are prompted to register/login to the Coupa Supplier Portal. Click **Join and Respond** to create a Coupa Supplier Portal account or **Log in to Coupa** if you are already using Coupa for other customers.	**Example: New to Coupa Supplier New to Mitie** — **Example: Existing Coupa Supplier New to Mitie**

Example: New to Coupa Supplier New to Mitie

Profile Information Request

As part of our recent acquisition ,you have been identified as a valued supplier. We welcome you, and looking forward to you continuing to provide your goods/services to Mitie!

As part of the acquisition process, this request is to facilitate the change, you must now complete this request to ensure we have your latest information, and that we minimise any disruption to orders, invoicing and payments.

In order to transact with Mitie you must click the "Join and Respond" button below.

You must join the Coupa supplier portal where you will be able to view all your purchase orders and submit invoices electronically as well as update your company details
For useful tips and advice on using the Mitie supplier portal, please go to **https://mitiesuppliers.com**

We look forward to working with you.
Mitie Group PLC

https://www.mitie.com

Join and Respond

Example: Existing Coupa Supplier New to Mitie

Update your profile for Mitie Group Plc

As part of our recent acquisition ,you have been identified as a valued supplier. We welcome you, and looking forward to you continuing to provide your goods/services to Mitie!

As part of the acquisition process, this request is to facilitate the change, you must now complete this request to ensure we have your latest information, and that we minimise any disruption to orders, invoicing and payments.

In order to transact with Mitie you must click the "Join and Respond" button below.

You must join the Coupa supplier portal where you will be able to view all your purchase orders and submit invoices electronically as well as update your company details
For useful tips and advice on using the Mitie supplier portal, please go to https://mitiesuppliers.com

We look forward to working with you.

Mitie Group PLC

https://www.mitie.com

Update Profile

Coupa Supplier Portal ('CSP'). Coupa is the tool used by Mitie to onboard new Suppliers as well as to maintain and amend existing Supplier details. The CSP offers suppliers an easy way to receive purchase orders from their Coupa-based customers. It is a no-cost tool for suppliers that makes working with Coupa a snap. The CSP lets you • Manage your company information	**coupa** supplier portal C ∨ NOTIFICATIONS 53 Home Profile Forecasts Orders Service/Time Sheets ASN Invoices Catalogues Payments Business Performance Sourcing Add-ons Setup CD **CC2 DEMO SUPPLIER_0000646896** Profile Progress **18%** Last Updated: about 1 month ago | View Profile **Recent Activity** View ∨ ⓘ **Announcements** No Announcements

• Configure your company PO transmission preferences for each customer • View POs from all your connected customers who use Coupa • Create invoices directly in Coupa	
Verify your email account. Once you have completed basic details to create a free account you will then be asked to verify your email account using a verification code sent	

The Coupa Supplier Portal set-up.
Coupa will search and sometimes make recommendations on if there maybe any existing accounts and ask if you wish review and merge accounts.

For new creation tick No, continue new account creation

Join an Existing Account?

Provide any of the additional info to get better suggestions.

○ View existing accounts matching email domain **mitie.com**

Business Name

CC2 Invite Screenshots LTD

Country/Region

⌄

Address Line 1

City	State	Postal Code

Tax ID	DUNS Number

✓ No, continue creating a new account

Next

Secure CSP Two Factor Authentication.
You will be asked to set-up authentication which will ensure that your details remain secure when using the CSP.

You can either scan the code or use an existing authentication app to verify a code

or

select a phone number which can be used to generate a text code.

Secure Your Payment Information

Two-Factor Authentication is **required** to finish setting up payment.

Authenticate via: Authenticator app ⌄

1 Scan this QR code using your mobile device.
- Open your preferred authentication app on your mobile device. Learn more
- For most apps, select "Add" or "+" to scan the QR code or copy and paste the security key.

Coupa Supplier Portal

Click to copy Security Key

2 Enter the 6-digit verification code from your device.

Next

Secure Your Payment Information

Two-Factor Authentication is **required** to finish setting up payment.

Authenticate via: Phone Text Message ⌄

1 A message will be sent to your phone.

Phone Number
+44 ▾ 79
Invalid format. Example: +1 123-456-7890

2 Confirm ReCAPTCHA.

✓ I'm not a robot
reCAPTCHA
Privacy - Terms

Send Code

3 Enter the 6-digit verification code sent to your phone.

Next

Recovery Codes Initially on set-up you will be given some recovery codes which you can save in case there is an issue with phone or authentication app at any time in the future. Please save a copy for use in an emergency		**Emergency Recovery Codes** Emergency Recovery codes are the only way to restore access if you lose access to your authenticating device or app. You can use each recovery code only once. Save your recovery codes somewhere safe but accessible. EXAMPLE FCRDZQ P-VsNg Print Download Copy These codes were generated on March 19, 2024 Next

Initial Connect to Mitie. Whilst it is encouraged that you do complete your contact and profile details. It's possible from this page to skip through until you reach the Mitie request page asking for additional information.	**Your Contact Information** Your default payment term / Automatically replace with this discount (you can change this later) * First Name: Example * Last Name: Name * Phone Number * Country/Region * Address Line 1 * City State * Postcode Net 30 ▶ Net 45 ▶ Net 60 ▶ Net 75 ▶ Net 90 ▶ Net 120 ▶ ☐ Use these preferences for all your customers ☐ My company does not offer discounts Invite user ⓘ Send Invite **Next** Skip for Now **Next** Skip for Now
Accepting Mitie's request for information. Once you've reached this page, please ensure you select the **Take Me There Option**	**Mitie Group Plc requires some additional information** This information must be provided before you can do business with Mitie Group Plc. **Take me there**

| **Completing the Form T&C**

At the start of the form will be a section where you can read and confirm compliance and acceptance of Mitie's terms. | Mitie Group Plc   Profile [Mitie Group Plc ▼]

Note:: should you be a subcontactor that profoms services on either Mitie or Mitie's Client sites, you must be on Alcumus SafeContractos accredited for the scopes of works relivant to the organisation. If your company does not currently meet this manditory requiremen, you will need to register and obtain your membership ID. After this, you will have a reasonable time to complete the accreditation, which make take several weeks, and Alcumus will support you through the procss as needed.

Please access https://www.safecontractor.com to register if you do not have an Alcumus Number.

All training and support information and guidance is available to all suppliers at Mitiesuppliers.com.

Suppliers should review infomation prior to submitting their completed form as this contains full details of all requirements to become an approved supplier for Mitie, including:

- Mitie Standard terms and conditions

- Mitie Guidance for suppliers on Modern Slavery and Human trafficking

- Mitie Social Value Policy

- Mitie Information Security and Cyber requirements

- Mitie requirements for subcontractors - Alcumus SafeContractor accreditation, Mitie Contractor Handbook and Contractor Rules.

* IMPORTANT: Submitting this form confirms that you, as a Supplier, have read and agreed to the requirements to become a Mitie Supplier as highlighted above.
☐

* Will you be providing onsite services to Mitie or Mitie's client site
[Select ▼] |
| **Completing the Form Supplier Name**

Hint's will guide you through each step, and here you will be asked to confirm the Supplier name held by Mitie is correct and subsequently complete confirmation in the Display Name to verify this. | |

| Supplier name and display name must be in capital letters | *** Supplier Name**

EXAMPLE SUPPLIER

Please add your company name in capitals. E.g NEW SUPPLIER LIMITED.

(as registered by Companies House or country equivalent)

* Display Name

EXAMPLE SUPPLIER

Please add your company name again here in capital letters |

Completing the Form Registered Address	
Completing the Form Registered Address All mandatory fields are highlighted for completion Please also complete State/Region	**Address Name** [ ] *Street Address [ ] Street Address 2 [ ] Street Address 3 [ ] Street Address 4 [ ] *City [ ] *Postal Code [ ] Location Code [ ] Address Purposes [Select Some Options] ⓘ *Region Country/Region [United Kingdom ▾] State Region [None ▾] State ISO Code [ ]

Completing the Form Basic Details

All mandatory fields are highlighted for completion

To ensure you are correctly classified in Coupa and help buyers find you to raise orders, please ensure this section is accurate.

Where you may provide multiple services / provide multiple types of goods. It is best to focus on what you will primarily be delivering to Mitie.

* Supplier Type

[⌄]

* Are you a registered company on companies house or country equivalent?

[Select   ⌄]

(as registered by Companies House or country equivalent)

* Do you operate via a Personal Services Company?

[Select   ⌄]

* Preferred Currency

[GBP   ⌄]

* Organisation Size

[⌄]

* Do you currently hold a waste carrier, broker or dealers licence or are a registered professional carrier and transporter of waste?

[Select   ⌄]

Please provide information on what Mitie is looking to purchase

* Please select your primary category

[⌄]

* Goods and Services Provided

[   ]

Please add either Goods, Services or Goods & Services

* Confirm if you provide onsite services

[⌄]

* Please provide details of the Goods/Service to be supplied to Mitie

[   ]

* Do you provide IT or IS Systems Hardware or Software and/or handle Mitie or Customer Information?

[Select   ⌄]

IMPORTANT: All suppliers who are providing these are required to complete an INFOSEC questionnaire prior to onboarding with Mitie. If you have not already completed this - ask your Mitie contact for more information

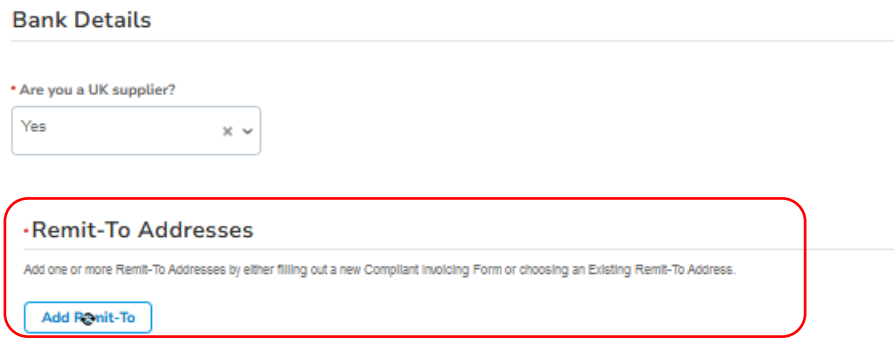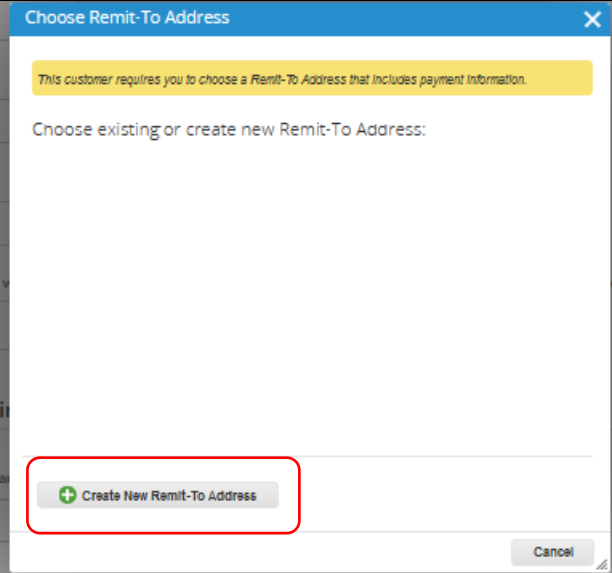|	

Completing the Form Bank Details
 	
To add bank details, you will need to create and add these into the form.
 	
Select if UK Supplier Yes / No and this will uncover the button to add bank details
	Bank Details
	
	* Are you a UK supplier?
	[Select ▼]
	
	* Please attach company banking details on letter headed paper and signed by company authorised signatory
	[Browse...] No file selected.
	
	Tax Details
	
	* Country of Operation
	[United Kingdom ▼]
	
	○ Are you VAT registered?
	   Yes
	○ No
	
	○ Are you registered under the CIS / Construction Industry Scheme?
	   Yes
	○ No
	https://www.gov.uk/what-is-the-construction-industry-scheme
	
	• Please provide your primary point of contact
	
	Contact Purpose
	[Select Some Options] ⓘ
	
	* First name
	[C1]
	
	* Last Name
	[C2]
	
	* Email Address
	[christina.conrad2+AQ@mitie.com] ⓘ
	
	* Work Phone
	[US/Canada ▼] [ ]
	        650-555-1212

Completing the Form Adding Remit/Bank details Select the Add Remit-To button	**Bank Details** * Are you a UK supplier? Yes × ∨ **·Remit-To Addresses** Add one or more Remit-To Addresses by either filling out a new Compliant Invoicing Form or choosing an Existing Remit-To Address. Add Remit-To
Creating Remit/Bank details. If you already have Coupa created Remit-To it will be listed in the screen for selection. However, where new to Coupa you will have the option to Create New Remit-To Address You will be asked to re-authenticate via code as this change related to bank details	**Choose Remit-To Address** × *This customer requires you to choose a Remit-To Address that includes payment information.* Choose existing or create new Remit-To Address: ⊕ Create New Remit-To Address Cancel

Legal Entity Set-Up.

Add the registered company name, and country of operations and selected **Continue**

Also add details of the type of company (use Information hit for help) and then select **Save & Continue**

Where's your business located?

Setting up your business details in Coupa will help you meet your customer's invoicing and payment requirements. For best results with current and future customers, complete as much information as possible.

* Legal Entity Name

* Country/Region

This is the official name of your business that is registered with the local government and the country/region where it is located.

Cancel | Continue

Miscellaneous Information

Setting up your business details in Coupa will help you meet your customer's invoicing and payment requirements. For best results with current and future customers, complete as much information as possible.

* Legal Entity Name   DEMO

* Country/Region   United Kingdom

* Type of Company   PLC

Board of Directors

Conducting business in certain countries/regions requires your invoice to contain specific information about your company.

Cancel | Save & Continue

Remit-To Address Creation.

If you have multiple customers, you can decide if this Remit-To could be used with All or specific customers. In this example the supplier only has Mitie as a client.

Complete all mandatory details and select **Save & Continue**

Tell your customers about your organisation

1 **2** 3 4

Which customers do you want to see this?

☑ All
☑ Mitie Group Plc

What address do you invoice from?

* Address Line 1 [   ]

* City [   ]

State [Select an Option ▼]

* Post Code [   ]

Country/Region   United Kingdom

☑ Use this address for Remit To *(i)*
☑ Use this for Ship-From address *(i)*

REQUIRED FOR INVOICING

Enter the registered address of your legal entity. This is the same location as where you receive government documents. *(i)*

What is your Tax ID? *(i)*

Country/Region [United Kingdom ▼] ×

* VAT ID [   ]

☐ I don't have a VAT/GST Number

Add additional Tax ID

Miscellaneous

Invoice-From Code [   ] *(i)*

Preferred Language [English (UK) ▼]

Cancel   **Save & Continue**

Bank Details Creation.

All bank details need to link to a Remit-To address, and in this example, you can see the previously created Remit-To address is now populated

Complete all mandatory bank details and select **Save & Continue**

Where do you want to receive payment?

1 2 **3** 4

* Payment Type Bank Account ⌄

What are your Bank Account Details? ⓘ

Bank Account Country/Region: United Kingdom ⌄

Bank Account Currency: GBP ⌄

Beneficiary Name: DEMO

Bank Name:

Account Number: ⓘ

Confirm Account Number:

Sort Code: ⓘ

SWIFT/BIC Code: ⓘ

☐ My bank does not have a BIC code

Branch Code:

Bank Account Type: Business ⌄

Supporting Documents Browse... No files selected. ⓘ

What is your Remit-To Address?

Address Line 1 High Street

City Brighton

State

Post Code BN1 2XX

Country/Region United Kingdom

Cancel **Save & Continue**

Final Remit-To Set-Up Steps.

Here you will confirm the address and ship from details and continue.

The final step now allows you to add the details into the Mitie supplier form.

Where do you want to receive payment? ✕

1 2 **3** 4

Remit-To locations let your customers know where to send payment for their invoices. Click Add Remit-To to add more locations, otherwise click Next.

[Add Remit-To]

Remit-To Account	Remit-To Address	Status	
Bank Account HSBC DEMO ------------*5555 121416	High Street Brighton BN1 2XX United Kingdom	Active	Manage

[Deactivate Legal Entity] [Cancel] [Next]

Where do you ship goods from? ✕

1 2 3 **4**

For many countries/regions, including different shipping details on the invoice is required if they are different to where your legal entity is registered.

[Add Ship From]

Title	Status	
High Street Brighton BN1 2XX United Kingdom	Active	Manage

[Deactivate Legal Entity] [Done]

Setup complete ✕

1 2 3 **4**

Do you want to Add Remit-To Address to the customer profile now?

[Add Later] [Add Now]

Completing the Form Adding Insurance details Here you will be asked to confirm and appropriate level evidence of insurances with attachments which will be reviews Please note that evidence of valid insurance will be monitored on an ongoing basis by Mitie to ensure continued compliance	Insurance Information. Anything outside of the Mitie guidelines will be subject to review by Group Insurance. • Employers Liability - £10m • Public/Product Liability - £10m • Professional Liability - £5m **Employers Liability Insurance** For guidance on required insurance levels click here https://mitiesuppliers.com/supplier-guides/ * Do you have Employers Liability Insurance? Select ⌄ **Public/Product Liability Insurance** * Do you have Public/Product Liability Insurance? Select ⌄ **Professional Liability Insurance** * Do you have Professional Liability Insurance? Select ⌄
Submitted the Form You have options to Save the Form if you are gathering details that you don't have to hand during the initial review Please note that you will be reminded of any outstanding forms to ensure completion in a timely manner. You can also ask Mitie questions during this process, and they can answer using the comments section	Decline Save **Submit for Approval** 💬 **Comments** Mute Comments ⌄ Enter Comment Add File I URL Send comment notification to a user by typing @name (ex. @JohnSmith) Add Comment

Once you are happy **Submit for Approval**	

Successful onboarding

Your request will be reviewed and process by Mitie.

Once the details have been validated, the form will be approved, and set-up will be complete. This will allow ordering and invoices between Mitie and your organisation.

Any changes to details provided will need to be supported by a request to Supplier.Maintenance@mitie.com who will then issue you with the Mitie Update form which can then be used to manage any future updates