

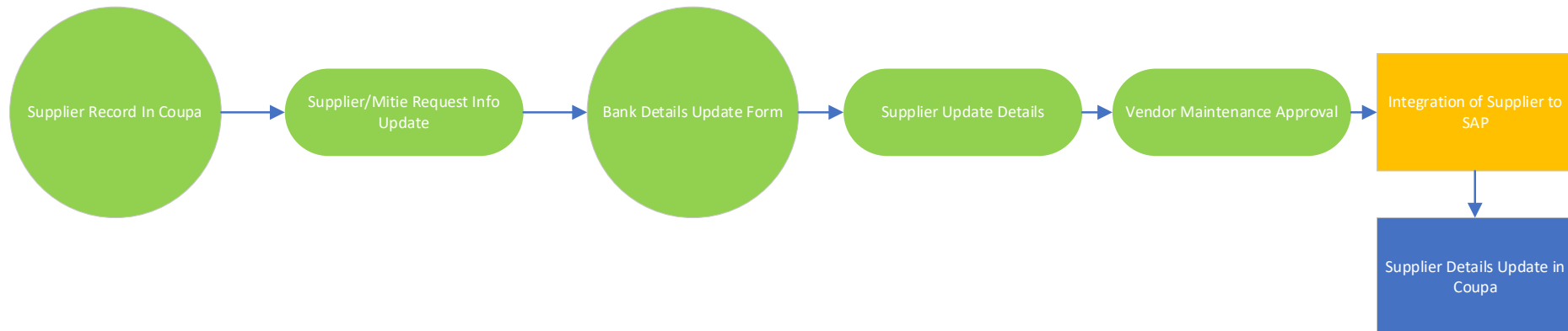


DSP – Supplier Onboarding

How to update bank details as a supplier

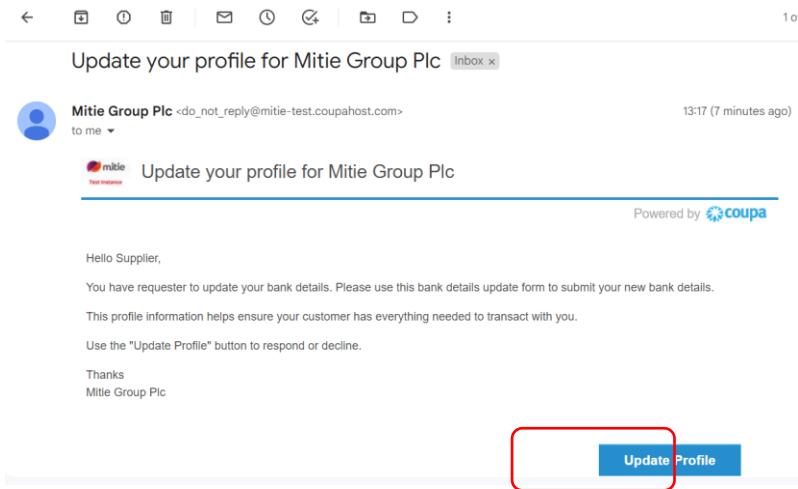
This tutorial will help you to update your bank details using the Bank Details Update form:

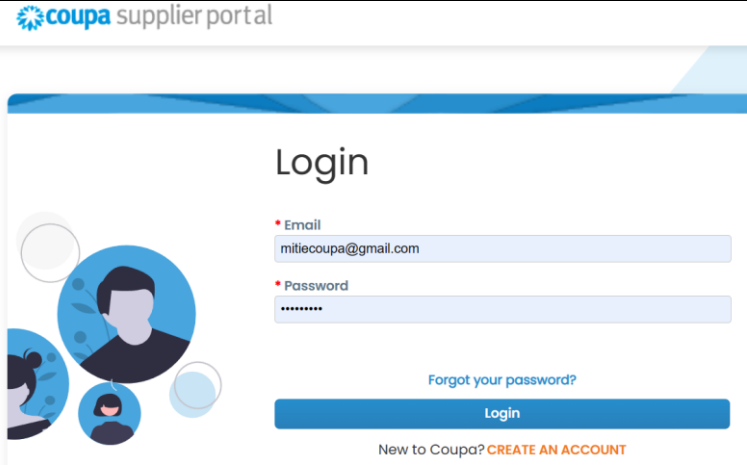

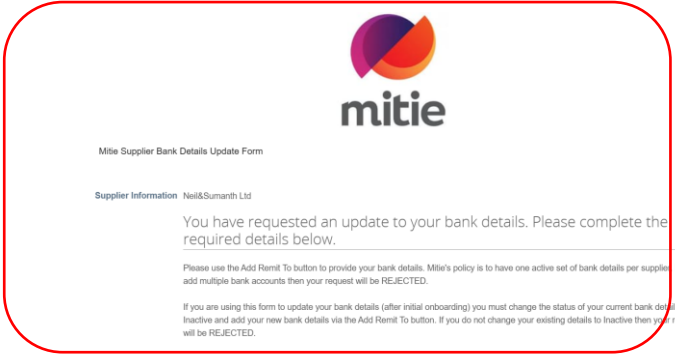
1. How to request bank details update
2. How you will know you have received the bank details update form
3. Completing the bank details update form and submitting.
4. How you know your bank details have been updated

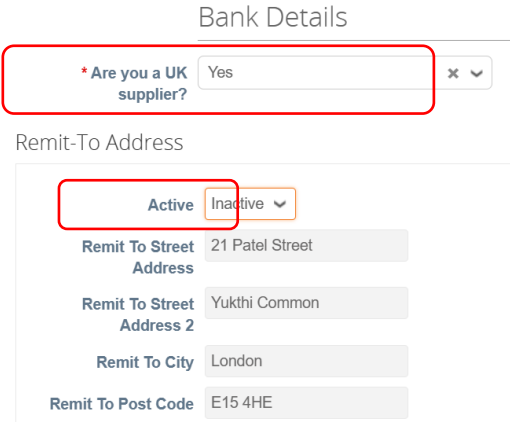
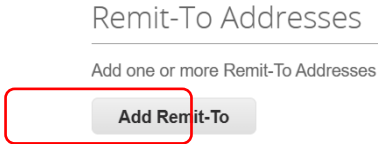
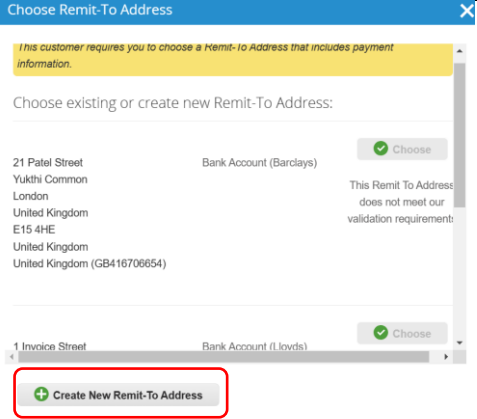








How to update your bank details using the Bank Details Update form in the Coupa Supplier Portal (CSP)

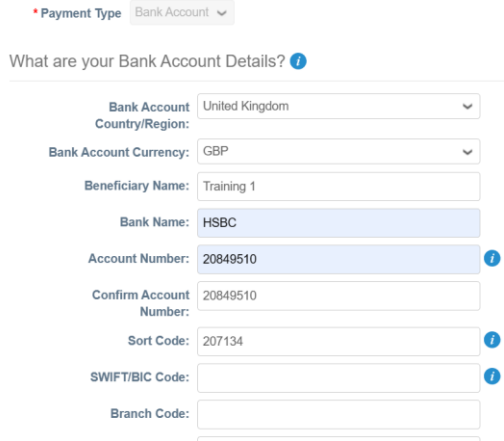
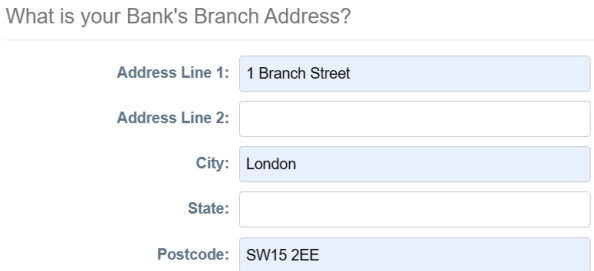
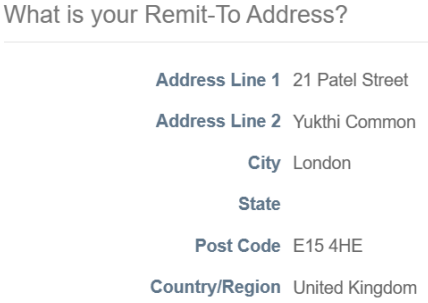
Mitie use Coupa to onboard new suppliers as well as to maintain and amend existing Supplier details. This training script assumes the supplier is already onboarded and they have contacted Mitie requesting a bank details update.

<p>1.</p>	<p>How to request an update to your banking details.</p> <p>Any supplier wishing to update their bank details will need to send an email to the supplier maintenance inbox (supplier.maintenance@mitie.com) requesting an update to their bank details. Supplier Maintenance will respond to your email confirming they will send you a Bank Details Update Form</p> <p>Only suppliers who are fully onboarded can update their bank details.</p> <p>If the supplier is in progress or not onboarded to Coupa, this must take place first. This training material assumes the supplier is fully onboarded and available in Coupa</p>
<p>2.</p>	<div style="display: flex;"> <div style="flex: 1;"> <p>You will receive an email confirming you have requested a bank detail update which will prompt you to login to the Coupa Supplier Portal (CSP)</p> <p>Click on the Update Profile button to be re-directed to the CSP to login.</p> </div> <div style="flex: 2;">  <p>The screenshot shows an email interface with the subject 'Update your profile for Mitie Group Plc'. The sender is 'Mitie Group Plc <do_not_reply@mitie-test.coupa.com>'. The email body contains the following text: 'Hello Supplier, You have requested to update your bank details. Please use this bank details update form to submit your new bank details. This profile information helps ensure your customer has everything needed to transact with you. Use the "Update Profile" button to respond or decline. Thanks Mitie Group Plc'. A blue button labeled 'Update Profile' is highlighted with a red rectangular box.</p> </div> </div>
<p>3.</p>	<p>Login to the Coupa Supplier Portal</p>

	<p>The login details will be the details you used when you originally logged in to the CSP.</p>	
<p>4.</p>	<p>Under the Notifications section, a notification will be visible requesting an update to your profile. Click on the notification.</p>	
<p>5.</p>	<p>The Bank details update form will be displayed for you to change your bank details.</p>	

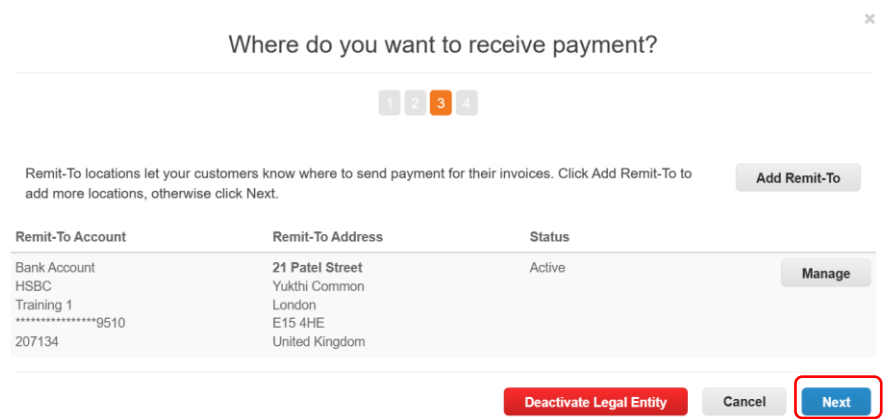
<p>6.</p>	<p>Click the drop down to determine if you are a UK or Non-UK supplier.</p> <p>Your current bank details will be displayed under the Remit-To Address section. Please click the Active drop down and choose Inactive. Mitie does not accept multiple bank details per supplier.</p>	 <p>Bank Details</p> <p>* Are you a UK supplier? Yes</p> <p>Remit-To Address</p> <p>Active Inactive</p> <p>Remit To Street Address 21 Patel Street</p> <p>Remit To Street Address 2 Yukthi Common</p> <p>Remit To City London</p> <p>Remit To Post Code E15 4HE</p>
<p>7.</p>	<p>Scroll further down and click Add Remit-To</p>	 <p>Remit-To Addresses</p> <p>Add one or more Remit-To Addresses</p> <p>Add Remit-To</p>
<p>8.</p>	<p>The option to create a new remit to address will appear and any previous remit to addresses will be visible.</p> <p>Click Create New Remit To-Address</p>	 <p>Choose Remit-To Address</p> <p>This customer requires you to choose a Remit-To Address that includes payment information.</p> <p>Choose existing or create new Remit-To Address:</p> <p>21 Patel Street Bank Account (Barclays) Choose</p> <p>Yukthi Common London United Kingdom E15 4HE United Kingdom (GB416706654) This Remit To Address does not meet our validation requirement</p> <p>1 Invoice Street Bank Account (Lloyds) Choose</p> <p>+ Create New Remit-To Address</p>

<p>9.</p>	<p>Under the section Where is our business located? choose your legal entity name and country</p>	<p>* Legal Entity Name Training 1</p> <p>* Country/Region United Kingdom</p>
<p>10.</p>	<p>Under the section Miscellaneous Information add Type of Company. The legal entity and region will be defaulted from the previous page.</p> <p>Note: Depending on the country/region chosen, more mandatory information may be required in this section.</p>	<p>* Legal Entity Name Training 1</p> <p>* Country/Region United Kingdom</p> <p>* Type of Company Limited </p> <p>Board of Directors </p>
<p>11.</p>	<p>Under the section Tell your customers about your organisation scroll to the bottom of the screen and add details to What address do you invoice from section.</p> <p>You can enter a new address or click the drop down under Use an existing address. This will auto fill the address fields.</p> <p>The address can be used for the Remit To and Ship from address</p>	<p>What address do you invoice from?</p> <p>Use an existing address </p> <p>* Address Line 1 Select GB, 21 Patel Street , London</p> <p>Address Line 2</p> <p>* City</p> <p>State</p> <p>* Post Code</p> <p>Country/Region United Kingdom</p> <p><input checked="" type="checkbox"/> Use this address for Remit To </p> <p><input checked="" type="checkbox"/> Use this for Ship-From address </p>
<p>12.</p>	<p>Under What is your Tax ID, add you VAT ID</p> <p>Note: Coupa will validate the format but will not validate the actual ID</p> <p>Scroll to the bottom and click Save & Continue</p>	<p>What is your Tax ID? </p> <p>Country/Region United Kingdom</p> <p>* VAT ID GB342567289</p>

<p>13. Under Where do you want to receive payment section add your new bank details</p> <p>Bank Account Country/Region, Bank Account Currency and Beneficiary Name will be defaulted from the previously entered details. UK requires Bank Name, Bank Account and Sort Code.</p> <p>Non-UK supplier will require different banking details depending on the country.</p>	
<p>14. Scroll down and complete the details under What is your branch address</p>	
<p>15. What is your Remit-To Address – this will be defaulted if you have checked the box Use this address for remit-to in section 11. If this box is not checked, add new remit-to details.</p> <p>Click Save & Continue. Coupa will verify the information</p>	

16. Where do you want to receive payment? This page is a snapshot of the Remit-To Account and Remit-To Address.

Click **Next**



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

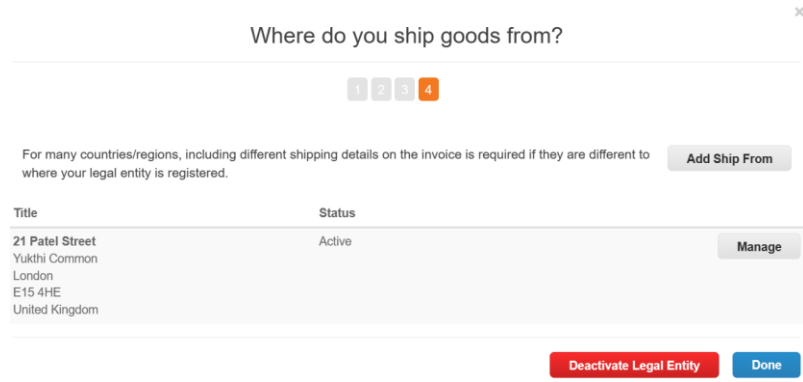
Remit-To Account	Remit-To Address	Status
Bank Account HSBC Training 1 *****9510 207134	21 Patel Street Yukthi Common London E15 4HE United Kingdom	Active

Manage

Deactivate Legal Entity Cancel Next

17. Where do you ship goods from? A snapshot if the ship from address

Click **Done**



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

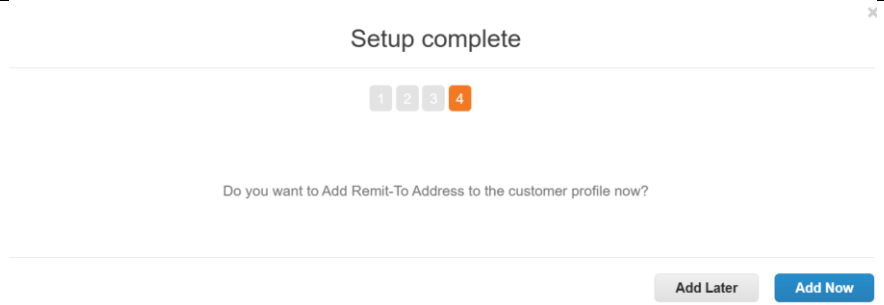
Title	Status
21 Patel Street Yukthi Common London E15 4HE United Kingdom	Active

Manage

Deactivate Legal Entity Done

18. Set Up Complete

Click **Add Now**

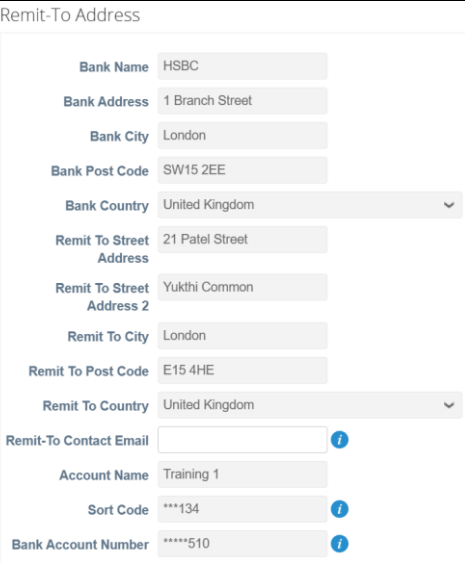
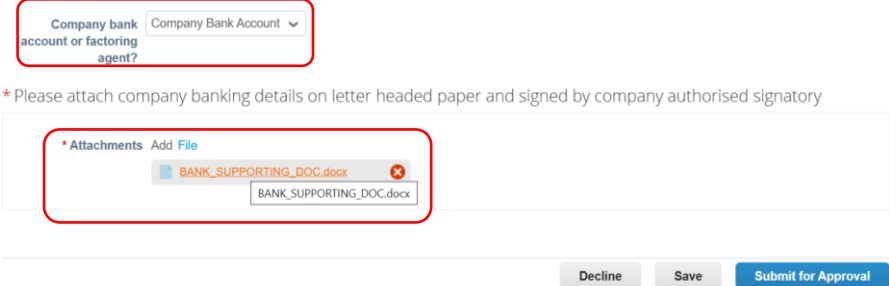





Setup complete

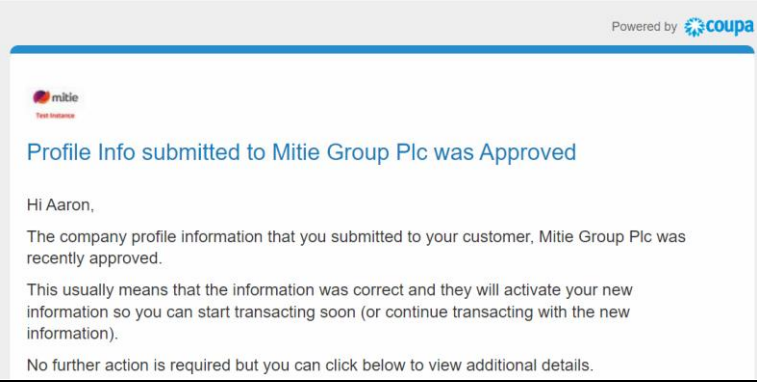
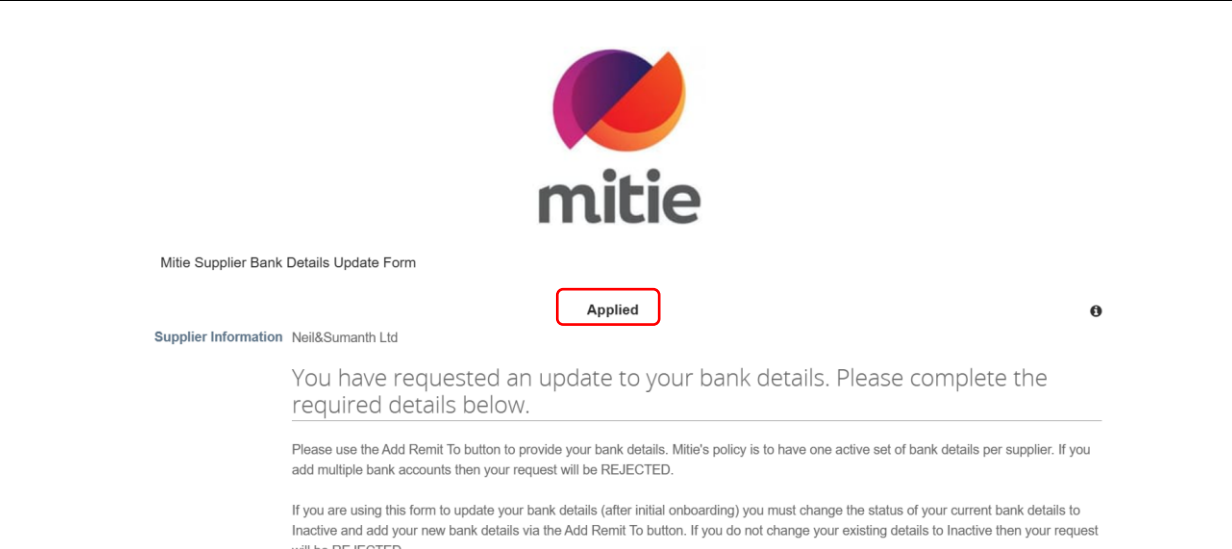
1 2 3 4

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

Add Later Add Now

<p>19. Coupa will return to the Update bank details form and the new bank details will be displayed under a new Remit-To Address.</p> <p>All the details added in the CSP will be defaulted to the form.</p>	
<p>20. Choose from the drop-down Company Bank Account or Factoring Agent. This will be defaulted from your original entry.</p> <p>Attach a supporting document. The previous document will be defaulted here. Mousing over the doc will allow it to be deleted and a new one added.</p> <p>It's crucial this document is a signed, company letter headed paper confirming the bank details. If not, the form will be rejected.</p> <p>Click Submit for Approval</p>	

<p>21. The form is now with Mitie in Pending Approval status. Mitie will review the details and make a telephone call to your company to verify the bank details.</p>	<div style="text-align: right; border: 1px solid red; padding: 2px; display: inline-block;">Pending Approval</div> <p>Supplier Information Neil&Sumanth Ltd</p> <p>You have requested an update to your bank details. Please complete the required details below.</p> <hr/> <p>Please use the Add Remit To button to provide your bank details. Mitie's policy is to have one active set of bank details per supplier. If you add multiple bank accounts then your request will be REJECTED.</p>
<p>22. If your details are not accepted by Mitie, you will receive 2 emails.</p> <p>Email 1 is informing you submitted was not approved. Clicking Update Info will take you to the Bank Details Update form.</p> <p>Email 2 is the comments stating why the information submitted was not approved.</p> <p>You can go back and forth with Mitie with comments by clicking the Respond button</p>	<div style="border: 1px solid #ccc; padding: 10px;">  <h3 style="color: #0070C0;">Profile Info submitted to Mitie Group Plc was Not Approved</h3> <p>Hi Aaron,</p> <p>The company profile information that you submitted to your customer, Mitie Group Plc was not accepted.</p> <p>This usually means that some information was not correct and they cannot activate your new information as is.</p> <p>You can click below to view additional details or update your info.</p> <div style="text-align: center; margin-top: 10px;"> <div style="background-color: #A52A2A; color: white; padding: 5px 15px; border-radius: 10px; display: inline-block;">Update Info</div> </div> </div> <div style="margin-top: 20px;"> <p>Mitie Group Plc <do_not_reply@mitie-test.coupa.com> 15:20 (2 minutes ago) to me ▾</p> <div style="border: 1px solid #ccc; padding: 5px;">  <p>New Comment on Profile Info submitted to Mitie Group Plc</p> <p style="text-align: right; font-size: small;">Powered by  coupa</p> <p>Qasim Ali at Mitie Group Plc added a new comment on 27/01/2023 at 15:20 to the company information profile you submitted.</p> <p>The comment is "Please add the correct bank verification attachment"</p> <p>You can review the profile of submitted information or respond by clicking below.</p> <div style="text-align: right; margin-top: 10px;"> <div style="background-color: #A9A9A9; padding: 2px 10px; border: 1px solid #ccc; display: inline-block;">View Profile</div> <div style="background-color: #0070C0; color: white; padding: 2px 10px; border: 1px solid #ccc; display: inline-block; margin-left: 10px;">Respond</div> </div> </div> </div>

23.	The Bank Details Update form will be open for edit so you can edit any details and re-submit
24.	<p>If your details are approved, you will receive an email confirming the information you have submitted has been approved.</p>  <p>The screenshot shows an email header with the Mitie logo and 'Powered by Coupa'. The main text reads: 'Profile Info submitted to Mitie Group Plc was Approved'. It is addressed to 'Hi Aaron,' and states that the company profile information submitted to the customer was recently approved. It explains that this means the information was correct and will be activated soon. It concludes with 'No further action is required but you can click below to view additional details.'</p>
25.	<p>The Bank Details Update form will be in Applied status.</p> <p>Nothing further is required, and the bank details update is complete.</p>  <p>The screenshot shows the 'Mitie Supplier Bank Details Update Form' for 'Neil&Sumanth Ltd'. A red-bordered button labeled 'Applied' is visible. Below the button, the text states: 'You have requested an update to your bank details. Please complete the required details below.' There are two paragraphs of instructions: one about using the 'Add Remit To' button and another about changing the status of current bank details to 'Inactive' when updating.</p>