



# Supplier Onboarding



## How to answer to Mitie Onboarding as a Supplier

**This tutorial will help you answer the Mitie supplier form and create a Coupa Supplier Portal account.**

**The details in this training material cover how to:**

- **Find your onboarding email notification**
- **Create a Coupa Supplier Portal account**
- **Complete you Form including bank and tax details**
- **Add Certificates and Insurance documentation and send back to Mitie**

Coupa is the tool used by Mitie to onboard our new Suppliers as well as to maintain and amend existing Supplier details. This tutorial will detail how prospective Suppliers should complete you Onboarding Process and relevant Form in Coupa.

1. You will receive an email notification with an invitation to join the Coupa Supplier Portal ('CSP') - This is used to support Supplier Onboarding at Mitie.

Click **Join** and **Respond** to create a Coupa account. This will allow you to register and complete you Form.

**NOTE: Joining the CSP will also allow you to update supplier details directly in the portal should the need arise at a later date.**

Mitie is in the process of rolling out additional Coupa functionality to our Suppliers, including the submission of electronic invoices. Suppliers should refer to <http://mitiesuppliers.com> for further details.

The screenshot shows an email from the Coupa Supplier Portal. The header includes the subject 'Mitie Group Plc Profile Information Request - Action Required', the sender 'Coupa Supplier Portal <do\_not\_reply@supplier-test.coupahost.com>', and the recipient 'Release Management OPS'. The email is dated 'Mon 1/17/2022 9:54 AM'. The main body of the email features the Mitie logo and the subject line. Below this, it says 'Hello Supplier,' followed by a request for information to be provided electronically. A note states that not providing this information may impact business. There are two buttons: 'Join and Respond' (highlighted with a red box) and 'Respond Without Joining'. At the bottom, there are three links: 'Overview Learn more about the Coupa Supplier Portal', 'Need Help? Answers to common questions and issues', and 'Coupa Info Learn more about how companies use Coupa'. The email is powered by Coupa.

2. Set up your log in credentials and tick **“I accept the Privacy Policy and Terms of Use”**.

Click Get Started when ready.



## Create your business account

Mitie Group Plc is using Coupa to transact electronically and communicate with you. We'll walk you through a quick and easy setup of your account with Mitie Group Plc so you're ready to do business together.

Email

Password

Use at least 8 characters and include a number and a letter.

Password Confirmation

I accept the [Privacy Policy](#) and the [Terms of Use](#).

[Get Started](#)

[Having an issue with signup?](#)

[Forward this to someone](#)

3. **Review** your Company name and address details.

Some of this information will have been pre-populated by Mitie, but may be edited if required.

Click **Next** and then **Take Me There**.

**Milestone reached!**

**You have just completed your Coupa Supplier Portal initial setup and are ready to complete your Form, please see below:**

The screenshot shows a web form titled "Tell us about your business" with an information icon. The form is under the "Basics" section. It contains the following fields:

- \* Company Name:** GM Test Supplier Jar| (with a subtext "Your official registered company name")
- Website:** (empty text box)
- \* Country/Region:** United Kingdom (dropdown menu)
- \* Address Line 1:** Test
- Address Line 2:** Test
- \* City:** Test
- State:** Test
- \* Postal Code:** 12345

Below the form, there is a green checkmark icon and the text: "All set for now. On your first invoice with Mitie Group Plc, we will guide you through your legal entity setup." At the bottom right, there is an orange "Next" button. At the bottom center, there is an orange "Take Me There" button.

4. **You can now see the Mitie Supplier Form**

Some information has been pre-populated.

All fields marked with a red asterisk (\*) are mandatory.

**Download, read and agree to Mitie Terms and Conditions.**

**NOTE: If you decline to accept the Mitie Terms and Conditions, it means you cannot work with Mitie.**

Should you have any questions, please use the Comments section.

Review questions on Modern Slavery, Procurement and Social Value Policy.

Supplier Information GM Test Supplier Jan

You have been invited to become a Mitie supplier, please ensure the data you provide is accurate to ensure we can process your response in a timely manner. For guidance in completing this form, please refer to the link below which also includes the Mitie Terms & Standards required by Mitie.

Mitie Terms and Standards & User Guides <https://mitiesuppliers.com/supplier-guides/>

\* I confirm that I have read and agree to the Mitie Terms and Conditions  Yes  No

Any specific terms already agreed with Mitie will supersede the standard terms

\* I confirm that I have read and agree to the Mitie Terms and Conditions  Yes  No

Any specific terms already agreed with Mitie will supersede the standard terms

\* Please state the reason you have not agreed to the Mitie Terms and Conditions

\* I confirm that I have read and agree to the Guidance for Mitie Suppliers on Modern Slavery and Human Trafficking  Yes  No

\* I confirm that I have read and agree to the Procurement Policy, Social Value Policy  Yes  No

5. If you will only be providing goods or services **offsite**, please proceed to Step 6

If you will be providing services **onsite**, then:

- **Confirm** that you agree with the **Contractor Handbook and Contractor Rules**. This can be found at <https://mitiesuppliers.com/supplier-guides/>
- Input your **Alcumus number**.

**NOTE: You must enter your Alcumus number if you selected Yes under 'Will you be providing any services on site?'**

If not already registered on Alcumus you will need to do so. Navigate to the Alcumus website and register to receive an Alcumus number: <https://safecontractor.co.uk>

**For onsite working, Mitie will be unable to progress the onboarding process without this information.**

\* Will you be providing any services on site? Yes x v

\* I confirm that I have read and agree to the Contractor Handbook and Contractor Rules  Yes  No

If you provide services onsite then it is a Mitie requirement that you need to be registered and fully accredited with Alcumus prior to commencing any work for Mitie.

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

\* Alcumus Number AA1234

6. **Basic Details**

**Check** the Company Name and Address details which have been pre-populated.

**Select a Supplier Type** (i.e., Private Limited Company, Sole Trader etc)

If the Company is registered on **Companies House**, select **Yes**.

The Company Registration Number may be defaulted from the initial request, if not please provide it or amend as required.

If your Company is not registered on **Companies House**, select **No**.

Specify if you **Are providing goods only**.

Confirm if you are **operating via a Personal Services Company**.

If you answered **No** to being registered on **Companies House**, then you will need to confirm you are a **Sole Trader**.

Your official address i.e. your address as registered on Companies House

\* Supplier Type Private Limited Company (LTD) ▼

\* Is this a registered company on companies house or country equivalent? Yes x ▼

\* Company Registration Number 12345678

For UK suppliers this must be an 8 digit number e.g: 12345678

\* Are you providing goods only? Yes x ▼

DUNS Number 123456789 i

Please ensure you enter the complete 9 digit number

\* Preferred Currency GBP ▼

\* Organisation Size Medium (<250 Staff and <£45m Turnover) ▼

If applicable, input your 9-digit **DUNS Number**,  
Complete the following fields:  
**Preferred Currency, Organisation Size**

Review the Question: **Do you have a waste carrier, broker or dealers' licence or are a registered professional carrier and transporter of waste?**

If you choose **Yes** from the drop-down, a new question will pop-up asking you to fill in your **Waste Carrier Licence** details.

Proceed to completing your **Bank Details**.

Your official address i.e. your address as registered on Companies House

\* Supplier Type

\* Is this a registered company on companies house or country equivalent?

\* Are you providing goods only?

\* Are you operating via a Personal Services Company?

Note: "Personal Service Company" (sometimes referred to as a PSC). This generally is referring to a company set up by an individual through which they provide their services. The individual, together with family members, would generally own a majority of the shares in the company.

For example, J Smith may own a company called "J Smith Limited" – and it is J Smith Limited which is the party responsible for providing services to Mite (albeit J Smith is the person who actually does the work). From April 2021 the 'off-payroll working' (IR35) rules apply to vendors operating through limited companies

\* Are you a Sole Trader?

\* Are you a Sole Trader?   
DUNS Number

Please ensure you enter the complete 9 digit number

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

\* Waste Carrier Licence



7. **Bank Details**

Select **Yes under Bank details**, make sure you read the prompt regarding any future updates to your banking information.

Click **Add Remit To** and then **Create Remit to Address**.

Bank Details

\* Please select 'Yes' if  Yes  
you are a new supplier,  No  
or if you are an existing  
supplier who needs to  
update their bank  
details.

Please select 'Yes' if you are in the process of initial onboarding.

Please use the below 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.

If you are using this form to update your bank details (after initial onboarding) you must change the status of your current bank details to Inactive and add your new bank details via the Add Remit To button. If you do not change your existing details to Inactive then your request will be REJECTED.

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

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

Required fields:

Complete the **'Where's your business located'** section, then click **Continue**.

Complete the **'Miscellaneous Information'** section, then click **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.

### Miscellaneous Information

1 2 3 4

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

\* Type of Company

Board of Directors

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

'Which customers do you want to see this?'

'What address do you invoice from?'

## Tell your customers about your organization

1 2 3 4

Which customers do you want to see this?

All

Mitie Group Plc - Test Supplier

What address do you invoice from?

\* Address Line 1

Address Line 2

\* City

State

\* Postal Code

Country/Region

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 where you receive government documents. *i*

'What is your Tax ID?'

'Where do you want to receive payment?'

On the "Where do you receive payment?" pop-up select **Payment Type = Bank Account**.

## What is your Tax ID?

Country/Region

\* VAT ID

I don't have a VAT/GST Number

Where do you want to receive payment? ×

1 2 3 4

\* Payment Type   
Address  
**Bank Account**  
Virtual Card

What is your Re?

Address Line 1

Address Line 2

City

State

Postal Code

Country/Region

Cancel

Save & Continue

When Banking data and invoicing address fields are complete, click **Save and Continue**.

Click **Next** until you see the button **Add Now**.  
Do NOT select 'Deactivate Legal Entity'.

\* Payment Type

What are your Bank Account Details? i

Bank Account Country/Region:

Bank Account Currency:

Beneficiary Name:

Bank Name:

Account Number:  i

Confirm Account Number:

Sort Code:  i

SWIFT/BIC Code:  i

Bank Account Type:

Supporting Documents  blank.pdf i

Setup Complete ×

1 2 3 4

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

<p>8. <b>Remit-To Address</b></p> <p>Verify your banking information and <b>choose Yes</b> under “<b>Is this a company bank account?</b> Select <b>No</b>, if using a factoring agent.</p> <p>Underneath the Bank account details, attach a signed document on company letterhead confirming your bank details signed by company authorised signatory.</p>	<p>* Remit-To Address</p> <div style="border: 1px solid #ccc; padding: 10px;"> <p>* Is this a company bank account? (select <input checked="" type="radio"/> Yes <input type="radio"/> No if using a factoring agent)</p> <p>* Bank Name <input type="text" value="Bank Of England"/></p> <p>* Bank Address <input type="text" value="25 Greham Street"/></p> </div> <p>* Please attach company banking details on letter headed paper and signed by company authorised signatory</p> <p>* Attachments <a href="#">Add File</a></p> <p><input type="text" value="blank.pdf"/></p>
<p>9. <b>Tax Details</b></p> <p>Select Country of Operation.</p> <p>If VAT registered, review or enter your <b>VAT Number</b>. (If applicable and not already populated).</p> <p>If you are not VAT registered, select <b>No</b> and add N/A in the <b>VAT Number</b> field.</p> <p>If you are registered under the Construction Industry Scheme fill in the <b>Unique tax reference (UTR) Number</b> and <b>CIS Registered Trading Name</b>.</p>	<p>Tax Details</p> <p>* Country of Operation <input type="text" value="United Kingdom"/></p> <p>* Are you VAT Registered <input checked="" type="radio"/> Yes <input type="radio"/> No</p> <p>* VAT Number <input type="text" value="GB123456789"/> e.g. GB123456789</p> <p>* Are you registered under the CIS / Construction Industry Scheme? <input checked="" type="radio"/> Yes <input type="radio"/> No <a href="https://www.gov.uk/what-is-the-construction-industry-scheme">https://www.gov.uk/what-is-the-construction-industry-scheme</a></p> <p>* Unique tax reference (UTR) Number <input type="text" value="U1234"/></p> <p>* Please provide your CIS/UTR registered trading name as registered with HMRC <input type="text" value="GM Test"/></p>

10. Check Primary Contact details

**Please Note:** You must provide your Phone Number

Any additional users can be added to the CSP at a later stage by your primary contact.

Fill in the **PO Email**.

\* Primary Contact for all communications for Mitie via Coupa

\* First Name

\* Last Name

\* Email Address

Phone Number

\* PO Email

Email address of who will receive Mitie Purchase Orders. We recommend a group email is used whenever possible.

11. **Fill in details under Employers' Liability Insurance.**

Answer the questions. Please ensure you enter the value of your insurance in the following way: £X,000,000

Ensure you attach copies of relevant insurances. Make sure to select the Expiration Date.

**Repeat the steps for Product Liability Insurance and Professional Liability Insurance.**

Please Note: this form will not be approved without valid insurance information.

**Click Submit for Approval.**

**Employers Liability Insurance**

For guidance on required insurance levels click here <https://mitiesuppliers.com/supplier-guides/>

\* Do you have Employers Liability Insurance?

\* What value of Employers Liability Insurance do you have?

\* Employers Liability Insurance

Effective Date

\* Expiration Date

\* Attachments Add [File](#)

Description

Please note, if at any point, you spot a mistake in the information provided in your Information form while it is still pending approval, you can correct it by withdrawing it, making the necessary changes and re-submitting it for approval.

**If necessary, click Withdraw.**

When information is correct, click **Submit for Approval**.

Please note, you will be sent automated reminders if the form is not completed at the following intervals:

First Reminder: After 2 days

Second Reminder: After 5 days

Third Reminder: After 10 days

Final Reminder: After 15 days

The request will be cancelled after 30 days, and you will no longer be able to complete the form.

If required, your onboarding process will have to start again.

**Milestone reached!**

**Your completed Supplier form is pending approval with Mitie. When your response is approved, you will be notified that your onboarding have been successful. For rejection, please see below:**

Please attach the relevant insurance certificate above

\* Have there been any claims made against this policy? No x v

Decline

Save

Submit for Approval

Please attach the relevant insurance certificate above

\* Have there been any claims made against this policy? No x v

Withdraw



**12. If your supplier form is rejected:**

You will be notified via email that the submitted form response was not accepted. You will also receive an email with comments added by the Mitie Vendor Maintenance team detailing the reason for rejection.

You have the option to view your profile, update and re-submit changes for Approval.

**Click Respond or Update info, this will take you back at step 4 giving you access to the Mitie Supplier form.**

Your initial answers on the form will be defaulted, change the details that were flagged in the rejection comment and click Submit for Approval.

**Milestone reached!**

**You have re-submitted your supplier form and it is now pending approval with Mitie. Once the changes have been reviewed and approved you will be notified via email, as well as in the Coupa Supplier Portal (CSP) account.**

[External] New Comment on Profile Info submitted to Mitie Group Plc

Mitie Group Plc <do\_not\_reply@mitie-test.coupahost.com>  
To: Release Management OPS

Reply Reply All Forward

Wed 2/9/2022 12:10 P

If there are problems with how this message is displayed, click here to view it in a web browser.

This message is from an EXTERNAL SENDER - be CAUTIOUS, particularly with links and attachments.



New Comment on Profile Info submitted to Mitie Group Plc

Powered by

Gellius Marincus at Mitie Group Plc added a new comment on 02/09/22 at 10:10 AM to the company information profile you submitted.

The comment is "Edit and resubmit"

You can review the profile of submitted information or respond by clicking below.

View Profile

Respond

[External] Profile Info submitted to Mitie Group Plc was Not Approved

Mitie Group Plc <do\_not\_reply@mitie-test.coupahost.com>  
To: Release Management OPS

Reply Reply All Forward

Wed 2/9/2022 12:10 PM

If there are problems with how this message is displayed, click here to view it in a web browser.

This message is from an EXTERNAL SENDER - be CAUTIOUS, particularly with links and attachments.



Profile Info submitted to Mitie Group Plc was Not Approved

Powered by

Hi test,

The company profile information that you submitted to your customer, Mitie Group Plc was not accepted.

This usually means that some information was not correct and they cannot activate your new information as is.

You can click below to view additional details or update your info.

Update Info