

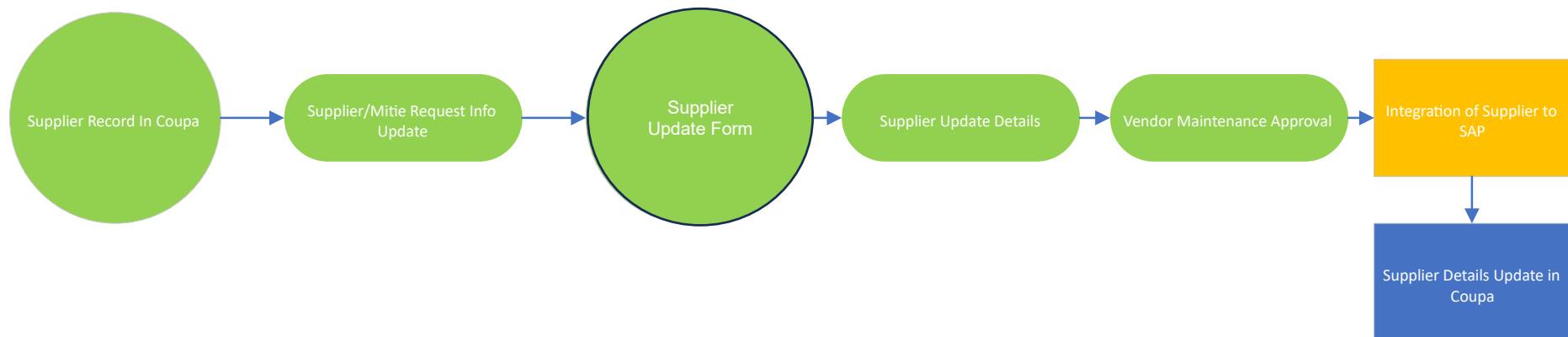


# Supplier Update Form

## How to complete the supplier update form

This guide will help you to update your supplier information with 3 possible sections.

1. Bank & Remit-To Details
2. Insurance Details
3. Basic Details.



Mitie use Coupa to onboard new suppliers as well as to maintain and amend existing Supplier details. “This How to Document” assumes the supplier is already onboarded and they have contacted Mitie requesting an update to their company details Mitie hold.

Mitie can only accept one each, bank account, remit to address and PO email address, Remit to email addresses per supplier account. Please note Mitie has a supplier website a comprehensive set of help guides etc ([mitiesuppliers.com](https://mitiesuppliers.com))

I.

**How to request an update to your company information held by Mitie. (If you have been sent a notification to update your details, go to step2)**

Any supplier wishing to update their company information will need to send an email to the supplier maintenance ([vendormasterdata@mitie.com](mailto:vendormasterdata@mitie.com)) requesting a supplier update form to be issued via Coupa.

Only suppliers who are fully onboarded can update their bank details.

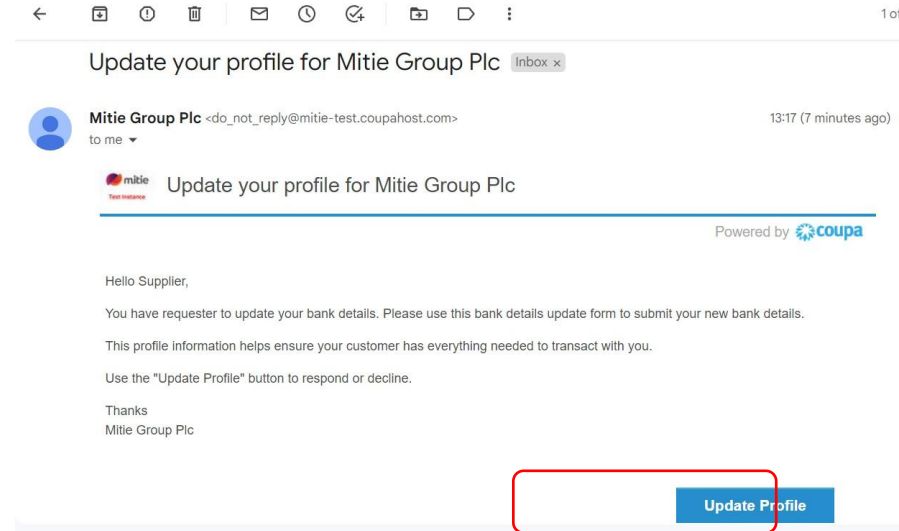
If the supplier is in progress or not onboarded to Coupa, this must take place first. This training material assumes the supplier is fully onboarded and available in Coupa

2.

You will receive an email to update your profile for Mitie which will prompt you to login to the Coupa Supplier Portal (CSP)

Click on the **Update Profile** button to be re-directed to the CSP to login.

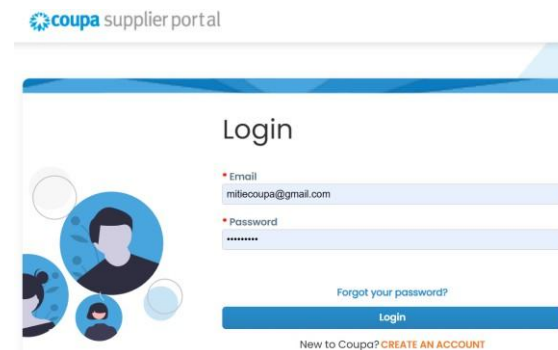
**Please note: your profile in your CSP account does not update Mitie and is separate from this form**

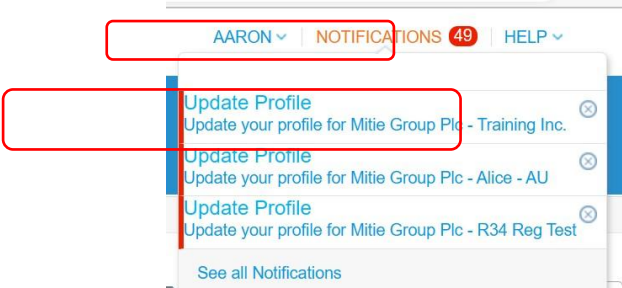
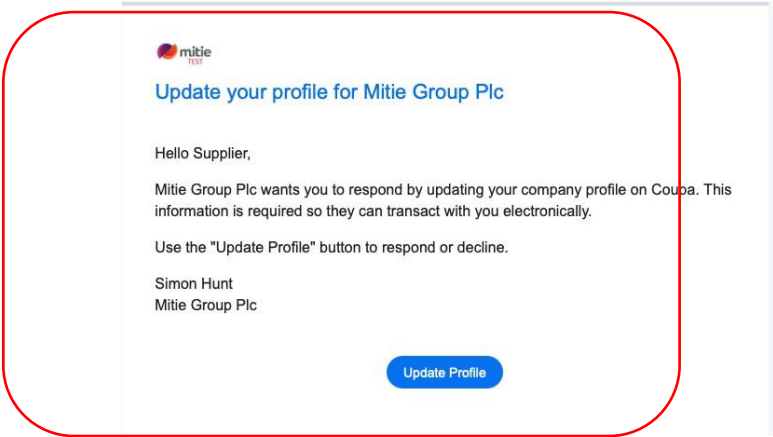


3.

Login to the Coupa Supplier Portal

The login details will be the details you used when you originally logged in to the CSP.



4.	<p>Under the <b>Notifications</b> section, a notification will be visible requesting an update to your profile. Click on the notification and the form will open.</p>	
5.	<p>You will also have received an Email notification sent to your email address, you can click the update profile button.</p>	

6.

The Form will open and will display 3 questions to answer. Select Yes or No depending on what Company information you are wishing to update with Mitie.

Depending on what you have selected the form will only show the relevant sections to complete.

This how to guide will talk you through each of the 3 sections, depending on your choices you will need to go to the relevant sections in the guide.

**Bank & Remit-To Details:**  
starts section 7

**Insurance Details Update:**  
starts section 24

**Basic Details Update:**  
Starts section 31

### You have requested an update to your details.

When completing an Update Form via the Coupa Supplier Portal please be aware that your centrally held details with Coupa (i.e: primary contact) may autopopulate onto the Form.

*Please pay attention to the details being submitted.  
It is good practice to ensure your centrally held Coupa data is also maintained.*

#### \* Bank & Remit-To Details Update

- ☐ Yes  
☒ No

Select bank details update to deactivate and send new bank details with supporting company headed paper and signature confirming account details

- Remit-To Address
- Remit-To Email
- Bank Account Details

#### \* Insurance Details Update

- ☐ Yes  
☒ No

Select insurance update to provide latest insurance details and attachments

- Employers Liability Insurance
- Public/Production Liability Insurance
- Professional Liability Insurance

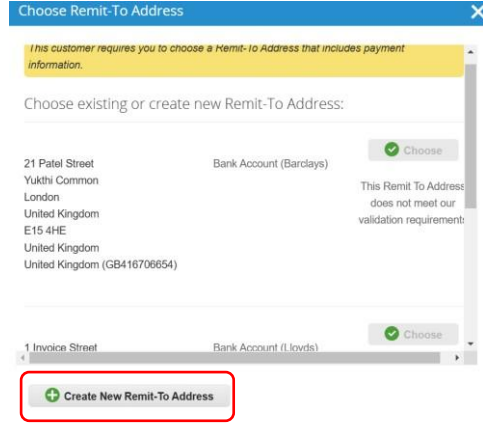

#### \* Basic Details Update


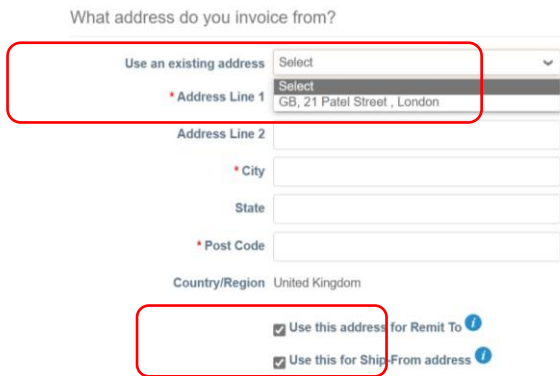
- ☐ Yes  
☒ No

Select basic details update for changes to:



- Name
- Primary Address
- Contact Email
- Tax Details
- Classification & Accreditation Details

7.	<p><b>Bank &amp; Remit-To Details</b></p> <p>This section allows you to update:</p> <ul style="list-style-type: none"> <li>• Remit-To Address</li> <li>• Remit-To Email</li> <li>• Bank Account Details</li> </ul>	<p>When there are changes to your bank / remit -to please ensure you follow these steps:</p> <ol style="list-style-type: none"> <li>1. Attach company headed paper with new account details and signatory</li> <li>2. Change status of current bank details and remit-to details from Active to Inactive</li> <li>3. Click add Remit-To button to provide new bank details</li> <li>4. Your new details will now show as an additional <u>Active</u> Remit-To with previous <u>Inactive</u> Remit-To section</li> <li>5. Enter remit-to email address details</li> </ol> <p>Note: your current remit to address will be greyed out and non-editable – this needs to be changed to inactive</p>
8.	<p><b>Preferred Currency</b></p> <p>use the dropdown to select your preferred currency</p>	<p>Preferred Currency</p> <p>GBP</p>
9.	<p>Please attach company banking details on letter headed paper and signed by company authorised signatory – click choose file and select your file to upload.</p>	<p>* Please attach company banking details on letter headed paper and signed by company authorised signatory</p> <p>Choose file No file chosen</p>
10.	<p>click <b>Add Remit-To</b></p>	<p>* Remit-To Addresses</p> <p>Add one or more Remit-To Addresses by either filling out a new Compliant Invoicing Form or choosing an Existing Remit-To Address.</p> <p>Add Remit-To</p>


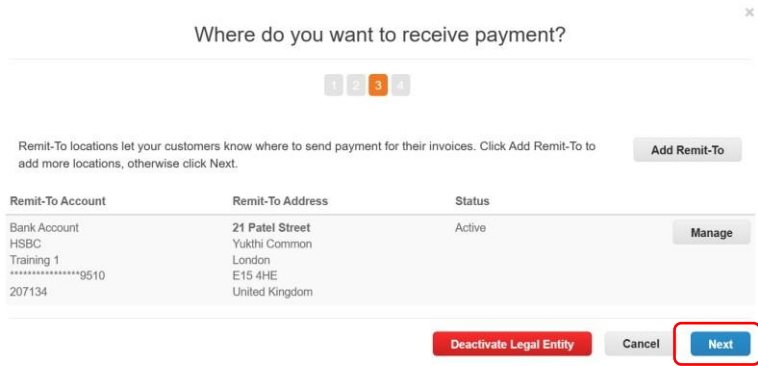
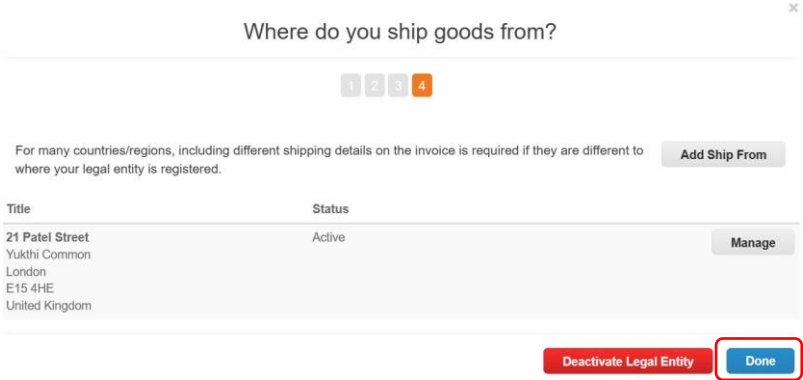
11.	<p>You might have 2 options to choose your current remit-to or sometimes it will be greyed out and give you the option to create a new remit to address will appear.</p> <p>If you were able select Choose go to section 20</p> <p>If not Click <b>Create New Remit To-Address</b></p> <p>Note: if you added a new remit-to info, once the form is submitted to go and check your legal Entity as it will have added an extra legal entity where you can deactivate one.</p>	
12.	<p><b>Creating New Remit To Address</b> - Under the section <b>Where is our business located?</b> choose your legal entity name (Your registered Company Name) and select your country</p>	

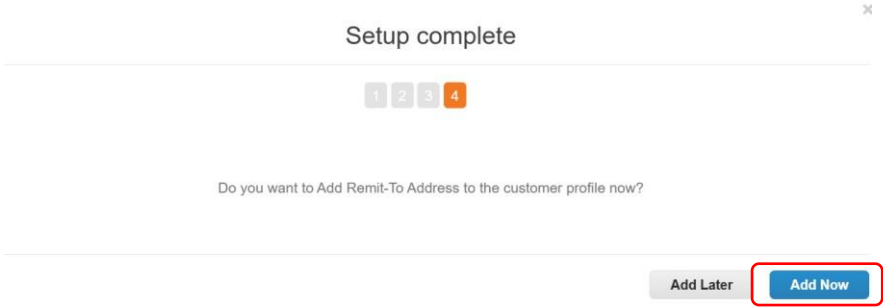
<p>13.</p>	<p>Under the section <b>Miscellaneous Information</b> add Type of Company. The legal entity and region will be defaulted from the previous page. (type of company is if your Limited, charity, sole trader etc)</p> <p>Note: Depending on the country/region chosen, more mandatory information may be required in this section. <b>Board of Directors is not mandatory.</b></p>	
<p>14.</p>	<p>Under the section <b>Tell your customers about your organisation</b> scroll to the bottom of the screen and add details to <b>What address do you invoice from</b> section.</p> <p>You can enter a new address or click the drop down under <b>Use an existing address</b>. This will auto fill the address fields.</p> <p>The address can be used for the Remit To and Ship from address</p>	

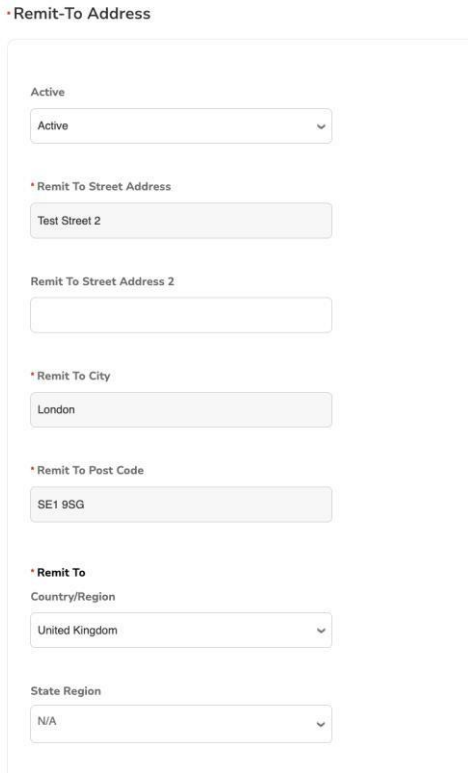
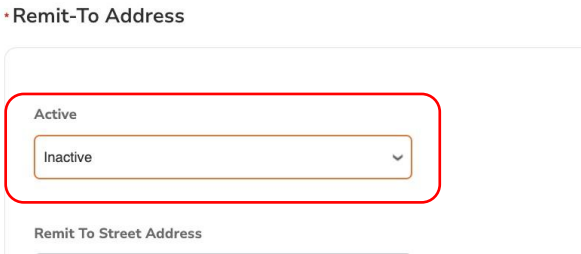


15.	<p>Under <b>What is your Tax ID</b>, add you VAT ID  Note: Coupa will validate the format but will not validate the actual ID  Scroll to the bottom and click <b>Save &amp; Continue</b></p>	<div data-bbox="904 119 1247 156">What is your Tax ID? </div> <div data-bbox="1102 212 1281 242">Country/Region</div> <div data-bbox="1301 212 1473 239">United Kingdom</div> <div data-bbox="1189 277 1281 303">* VAT ID</div> <div data-bbox="1301 277 1456 304">GB342567289</div>
16.	<p>Payment type: use the drop down to select <b>bank account</b>.</p> <p>Under <b>Where do you want to receive payment</b> 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>	<div data-bbox="1149 478 1350 497">* Payment Type Bank Account</div> <div data-bbox="1128 525 1424 545">What are your Bank Account Details? </div> <div data-bbox="1223 572 1406 592">Bank Account United Kingdom</div> <div data-bbox="1211 592 1308 608">Country/Region:</div> <div data-bbox="1167 620 1350 638">Bank Account Currency: GBP</div> <div data-bbox="1167 638 1308 654">Beneficiary Name: Training 1</div> <div data-bbox="1238 691 1350 707">Bank Name: HSBC</div> <div data-bbox="1207 726 1375 743">Account Number: 20849510</div> <div data-bbox="1211 762 1375 796">Confirm Account Number: 20849510</div> <div data-bbox="1247 809 1361 826">Sort Code: 207134</div> <div data-bbox="1211 845 1308 861">SWIFT/BIC Code:</div> <div data-bbox="1232 882 1308 898">Branch Code:</div>

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<p>17.</p>	<p><b>What is your Remit-To Address</b> – this will be defaulted if you have checked the box <b>Use this address for remit-to</b> in section 11. If this box is not checked, add new remit-to details.</p> <p>Click <b>Save &amp; Continue</b>. Coupa will verify the information</p>	
<p>18.</p>	<p><b>Where do you want to receive payment?</b> This page is a snapshot of the Remit-To Account and Remit-To Address.</p> <p>Click <b>Next</b></p>	
<p>19.</p>	<p><b>Where do you ship goods from?</b> A snapshot if the ship from address</p> <p>Click <b>Done</b></p>	

20.	<p><b>Set Up Complete</b></p> <p>Click <b>Add Now</b></p>	
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<p>21.</p>	<p>Coupa will return to the Update bank details form and the new bank details will be displayed under a new RemitTo Address.</p> <p>All the details added in the CSP will be defaulted to the form.</p> <p>You will need to update the applicable editable fields i.e. State, remit-to contact email. Bank info if required, bank address.</p>	 <p>The screenshot shows the 'Remit-To Address' form with the following fields and values:</p> <ul style="list-style-type: none"> <li><b>Active:</b> A dropdown menu with 'Active' selected.</li> <li><b>* Remit To Street Address:</b> A text input field containing 'Test Street 2'.</li> <li><b>Remit To Street Address 2:</b> An empty text input field.</li> <li><b>* Remit To City:</b> A text input field containing 'London'.</li> <li><b>* Remit To Post Code:</b> A text input field containing 'SE1 9SG'.</li> <li><b>* Remit To Country/Region:</b> A dropdown menu with 'United Kingdom' selected.</li> <li><b>State Region:</b> A dropdown menu with 'N/A' selected.</li> </ul>
<p>22.</p>	<p>If you scroll past your new Remit-to section you will see your old Remit to section, <b>it is important that you update the old remit-to section from Active to Inactive</b></p> <p>Failure to change this will result in your form being rejected.</p>	 <p>The screenshot shows the 'Remit-To Address' form with the 'Active' dropdown menu highlighted by a red rectangle. The dropdown menu is open, showing 'Inactive' as the selected option. The 'Remit To Street Address' field is visible below it.</p>

<p><b>23.</b></p>	<p>If you are only updating Bank &amp; Remit-to Check the form carefully and click submit for Approval.</p> <p>At the start If you have selected more than one Option to update your company information, please go to the relevant section.</p>	<p>There should only ever be 1 <u>active</u> Remit-To / Bank account on this form please check before you submit</p> <hr/> <div> <span>Decline</span> <span>Save</span> <span>Submit for Approval</span> </div>
<p><b>24.</b></p>	<p><b>Insurance Details Update</b> This section allows you to update:</p> <ul style="list-style-type: none"> <li>• Employers Liability Insurance</li> <li>• Public/Production Liability Insurance</li> <li>• Professional Liability Insurance</li> </ul>	<p>Insurance Information. Anything outside of the Mitie guidelines will be subject to review by Group Insurance. •</p> <p>Employers Liability - £10m • Public/Product Liability - £10m • Professional Liability - £5m</p>

**25.** The Insurance section will be displayed for you to change your details.  
Note: Some of the previous information you have supplied to Mitie will be defaulted in the Insurance Form. For example, if you answer yes to Do you have Employer Liability Insurance, the end date and document you originally supplied will be visible.

You will need to update or add your current insurance details with current certificates (PDF). If your certificate covers all insurance categories, please add the PDF to each section.

All the questions are the same for the 3 insurance requirements

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

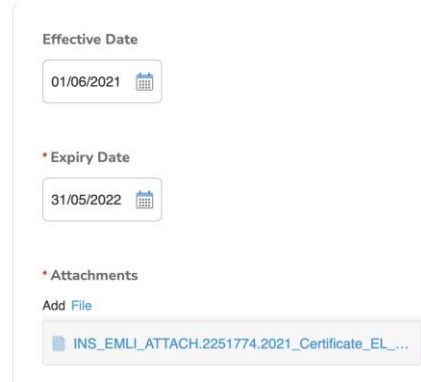
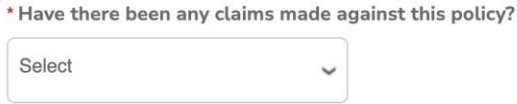
Professional Liability Insurance

\* Do you have Professional Liability Insurance?

Select

26.	<p>If you have not previously supplied any insurance details to Mitie, you must complete the form for all 3 insurances. (Liability, Public/Product Liability and Professional Liability).</p> <p>If you have answered No to any of the insurances, you will be asked why. This will be subject to assessment by Mitie Group Insurance</p>	<p>* Do you have Employers Liability Insurance?</p> <div data-bbox="1146 165 1435 225">No x v</div> <p>* Why do you not have Employers Liability insurance?</p> <div data-bbox="1146 312 1583 363"></div>
27.	<p>If you have answered No to any of the Mitie required insurance limits, you will be asked to state the value of the limit. You must add a numerical currency value. (example - £5,000,000.000). Not having the Mitie guidelines limit will result in assessment from Mitie Group Insurance.</p>	<p>Do you have £10,000,000.00 employers liability insurance?</p> <div data-bbox="1146 738 1391 783">No x v</div> <p>* Please state the value of employers liability insurance</p> <div data-bbox="1146 858 1516 903">£5,000,000.00</div> <p><small>This field must be populated with a numerical entry. Example: £5,000,000.00</small></p>



28.	<p>Update the Effective and Expiry Dates</p> <p>Add or update Proof of insurance PDF certificates or to whom it may concern letter from your broker.</p> <p>The expiry date must correspond with the attached document of the insurance for will be rejected.</p>	
29.	<p>You must state if any claims have been made against the policy. If the answer is Yes, this may be subject to further assessment from Mitie Group Insurance.</p> <p>This process should be repeated for all the insurance sections.</p> <p>If you have selected more than one Option to update your company information, please go to the relevant section to continue.</p>	

30.	<p>If you are only updating Insurance details Check the form carefully and click submit for Approval.</p> <p>You can Save at any time and come back to the form. If you click Decline, Mitie will be informed, and you may be blocked as a supplier.</p>	<div> <div>Decline</div> <div>Save</div> <div>Submit for Approval</div> </div>
31.	<p><b>Basic Details Update</b> This section allows you to update:</p> <ul style="list-style-type: none"> <li>• Name</li> <li>• Primary Address</li> <li>• Contact Email</li> <li>• Tax Details</li> <li>• Classification &amp; Accreditation Details</li> </ul> <p>The details Mitie already have will be defaulted into the question sets. It's a simple case of deleting the entries out and adding your new details. You only need to update the details you need to change, you don't have to complete the whole form. Note: If you have changed company name with a different company registration</p>	

	number, Mitie will require you to be set up as a new supplier.	
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32.	<p><b>Alcumus Number</b> -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 refer to <a href="https://www.safecontractor.com">https://www.safecontractor.com</a> to register if you do not have an Alcumus number If you do not fit this criteria leave blank</p>	<p>Alcumus Number</p> <div data-bbox="1084 212 1655 279">UK1234 </div>
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33.

**Supplier and Display Name** Please add your supplier name in capitals. E.g NEW SUPPLIER LIMITED. Name should be added as per your legal registered name.

\* Supplier Name

TEST SUPPLIER LTD

Please add your supplier name in capitals. E.g NEW SUPPLIER LIMITED. Name should be added as per the registered name on companies house

\* Display Name

TEST SUPPLIER LTD

Please add your supplier name again here in capital letters

34.	<p><b>Registered Business Address</b></p> <p>Update or complete the relevant fields for your registered business address, ensuring you have selected the correct country and state region.</p>	<div data-bbox="1182 132 1388 153">Registered Business Address</div> <div data-bbox="1200 188 1296 204">Address Purposes</div> <div data-bbox="1207 221 1308 237">Select Some Options</div> <div data-bbox="1200 288 1238 303">Region</div> <div data-bbox="1200 309 1281 323">Country/Region</div> <div data-bbox="1207 341 1272 357">United States</div> <div data-bbox="1200 400 1267 414">State Region</div> <div data-bbox="1207 429 1238 443">None</div> <div data-bbox="1200 491 1279 504">State ISO Code</div> <div data-bbox="1200 595 1276 609">Address Name</div> <div data-bbox="1207 628 1288 643">Primary_Address</div>
35.	<p><b>Supplier Type</b></p> <p>Select one of the drop-down options.</p>	<div data-bbox="1200 719 1285 735">Supplier Type</div> <div data-bbox="1200 762 1541 1046"> <div>✓</div> <div>Private Limited Company (LTD)</div> <div>Public Limited Company (PLC)</div> <div>Limited Liability Partnership (LLP)</div> <div>Partnership</div> <div>Self-Employed</div> <div>Sole Trader</div> <div>Social Enterprise</div> <div>Non-Profit</div> <div>Charity</div> <div>Public Sector Services</div> <div>Non-UK Organisation</div> <div>Limited Company (Contractor)</div> </div>
36.	<p><b>Company Registration Number</b></p> <p>For UK suppliers this must be an 8 digit number e.g: 12345678</p>	<div data-bbox="1099 1136 1393 1157">Company Registration Number</div> <div data-bbox="1111 1197 1200 1214">12345678</div> <div data-bbox="1099 1249 1592 1267">For UK suppliers this must be an 8 digit number e.g: 12345678</div>

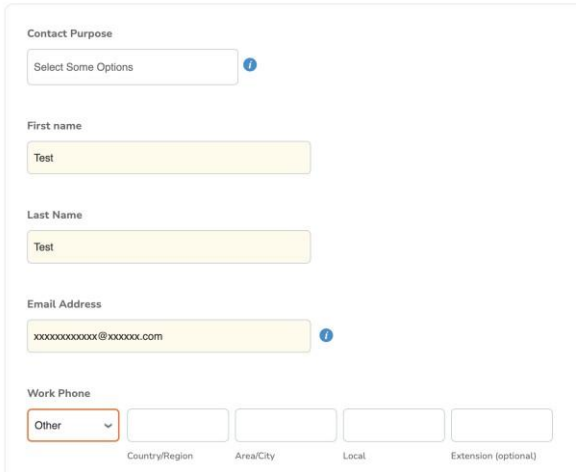


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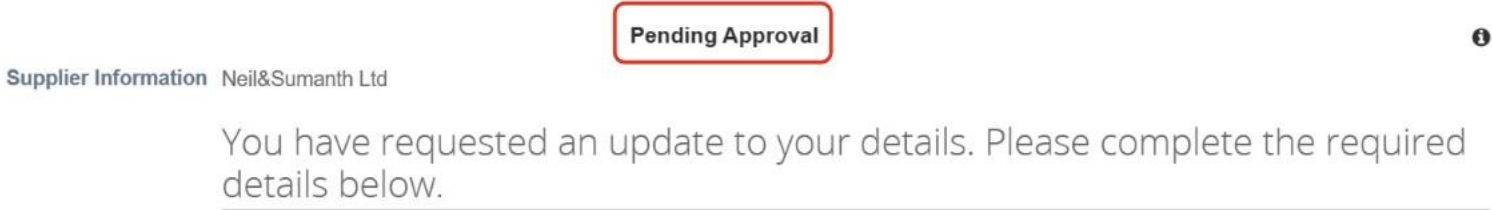
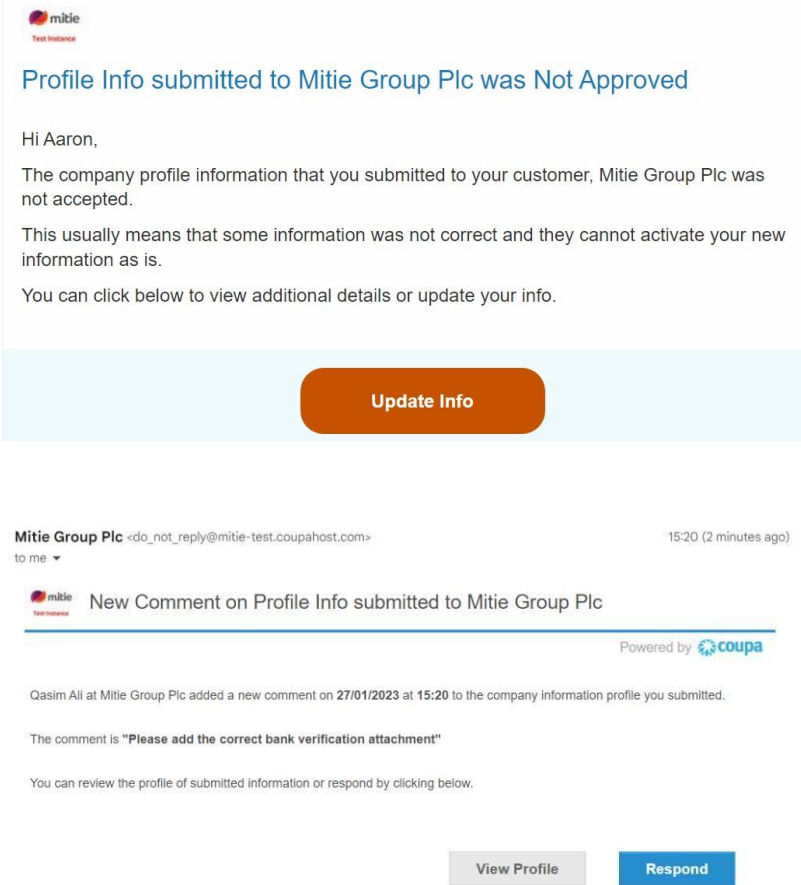
37.	<b>UK National Insurance Number</b> Only required for a UK Sole Traders	<div>UK National Insurance Number</div> <div></div> <div>Only required for a UK Sole Traders</div>
38.	<b>Organisation Size</b> Select one of the drop-down options.	<div>Organisation Size</div> <div><div>✓</div><div>Micro (&lt;10 Staff and &lt;£1.75m Turnover)</div><div>Small (&lt;50 Staff and &lt;£8m Turnover)</div><div>Medium (&lt;250 Staff and &lt;£45m Turnover)</div><div>Large (&gt;250 Staff and &gt;£45m Turnover)</div></div>
39.	<b>Waste Carrier Licence</b> If you are registered as a professional carrier and transporter of waste (add registered number) If not leave Blank	<div>Waste Carrier Licence</div> <div></div> <div>If you are registered as a professional carrier and transporter of waste (add registered number)</div>

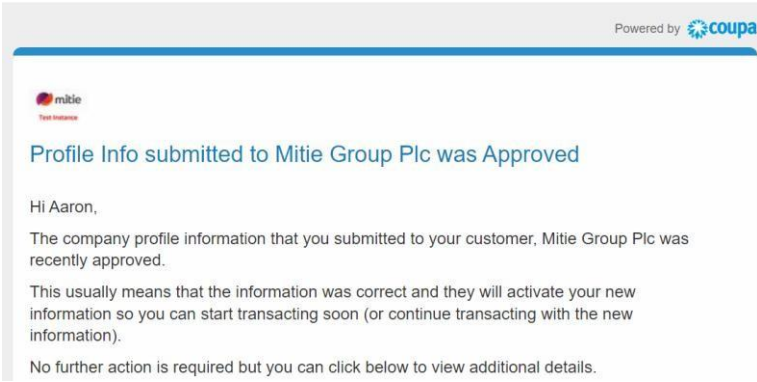
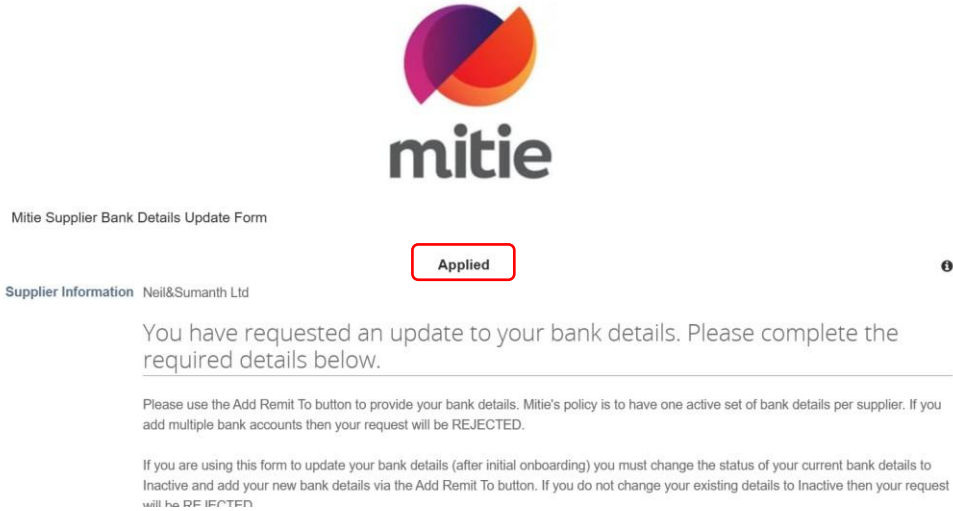
40.	<div><div>Tax Details</div><div>Country of Operation</div><div>Select your country of operation.</div></div>	<div>Country of Operation</div> <div>United Kingdom</div>
41.	<div><div>VAT / Tax Number</div><div>Please enter your Tax code with country prefix and no spaces e.g:<ul style="list-style-type: none"><li>GB123456789</li><li>FR12345678901</li><li>DE123456789</li></ul></div><div>If you don't have a VAT / TAX number leave blank</div></div>	<div>VAT / Tax Number</div> <div></div> <div>Please enter your Tax code with country prefix: e.g:<ul style="list-style-type: none"><li>GB123456789</li><li>FR12345678901</li><li>DE123456789</li></ul></div>



42.	<p><b>Unique tax reference (UTR) Number &amp; your registered trading name as registered with HMRC</b></p> <p>Only required for Construction Industry Scheme (CIS) registered suppliers to complete if not leave blank</p>	<div><div>Unique tax reference (UTR) Number</div><div></div><div>Only required for Construction Industry Scheme (CIS) registered suppliers</div></div> <div><div>Please provide suppliers CIS/UTR registered trading name as registered with HMRC</div><div></div><div>Only required for Construction Industry Scheme (CIS) registered suppliers</div></div>
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<p>43.</p>	<p><b>Provide Point the supplier primary point of contact.</b></p> <p>Please complete with the point of contact details for your company</p>	<p>Please provide the supplier primary point of contact</p>  <p>The form contains the following fields: Contact Purpose (dropdown with 'Select Some Options'), First name (text box with 'Test'), Last Name (text box with 'Test'), Email Address (text box with 'xxxxxxxxxx@xxxxxx.com'), and Work Phone (dropdown with 'Other' and four adjacent text boxes for Country/Region, Area/City, Local, and Extension (optional)).</p>
<p>44.</p>	<p><b>PO Email</b></p> <p>Email address of who will receive Mitie Purchase Orders. We recommend a group email is used whenever possible.</p>	<p>PO Email</p>  <p>The form contains a single text box for the email address with the placeholder 'xxxxxxxxxx@xxxxxx.com'.</p> <p>Email address of who will receive Mitie Purchase Orders. We recommend a group email is used whenever possible.</p>
<p>45.</p>	<p>If you are only updating the Basic Details Check the form carefully and click submit for Approval.</p> <p>You can Save at any time and come back to the form. If you click Decline, Mitie will be informed, and you may be blocked as a supplier.</p>	 <p>The buttons are: Decline (light grey), Save (light grey), and Submit for Approval (blue).</p>

46.	<p>The form is now with Mitie in Pending Approval status. Mitie will review the details and either Approve or Reject</p>	
47.	<p>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 <b>Respond</b> button</p>	

48.	The form will be open for edit so you can edit any details and re-submit	
49.	<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 from Mitie Group Plc. The header says 'Powered by coupa'. The subject line is 'Profile Info submitted to Mitie Group Plc was Approved'. The body of the email says: 'Hi Aaron, The company profile information that you submitted to your customer, Mitie Group Plc was recently approved. This usually means that the information was correct and they will activate your new information so you can start transacting soon (or continue transacting with the new information). No further action is required but you can click below to view additional details.'</p>
50.	<p>The Supplier 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'. At the top is the Mitie logo. Below it, the title 'Mitie Supplier Bank Details Update Form' is displayed. Underneath, there is a red box with the word 'Applied' inside. To the right of this box is a small icon of a person. Below the 'Applied' box, the text 'Supplier Information Neil&amp;Sumanth Ltd' is shown. The main body of the form contains the following text: 'You have requested an update to your bank details. Please complete the required details below.' followed by a horizontal line. Below the line, it says: '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.' At the bottom, it says: '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.'</p>

For all Coupa supplier help and guides Click [here](#) for Mitie Suppliers website.