

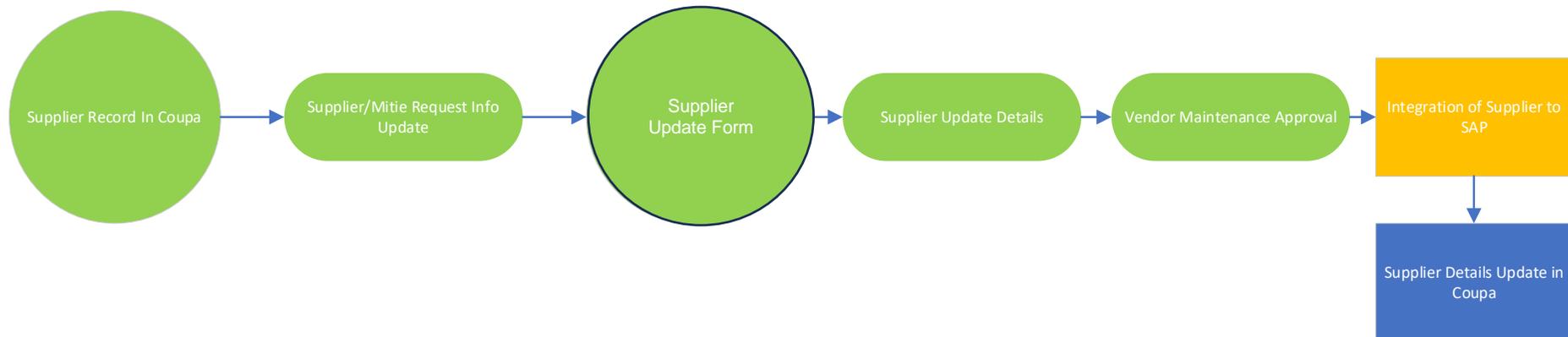


Supplier Update Form

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)

1.

**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 (supplier.maintenance@mitie.com) requesting a supplier update form to be issued via Coupa.

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

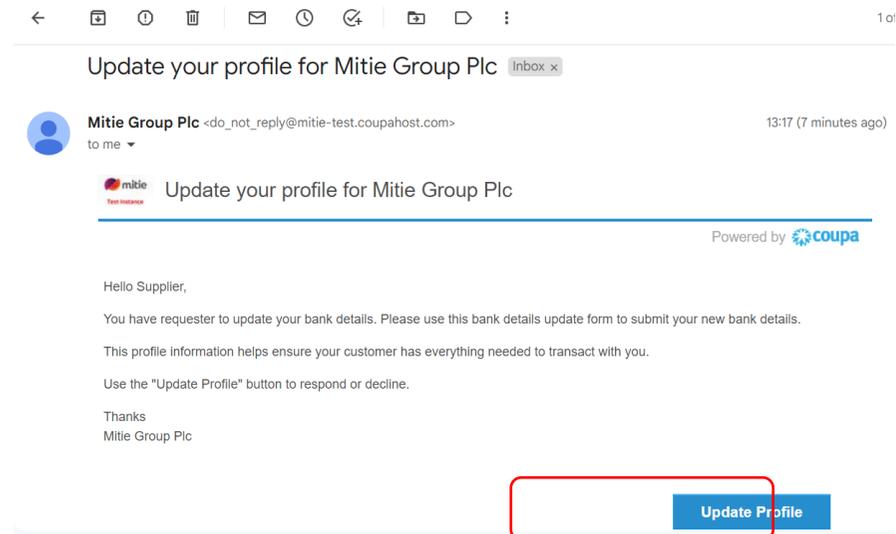
If the supplier is in progress or not onboarded to Coupa, this must take place first. This training material assumes the supplier is fully onboarded and available in Coupa

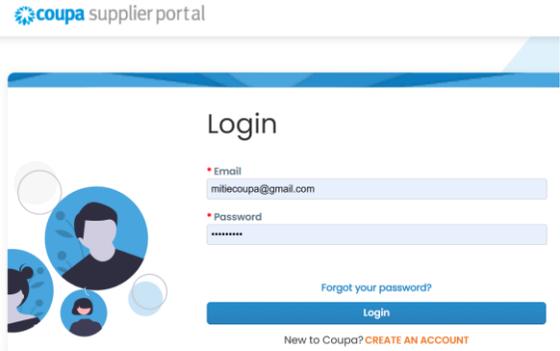
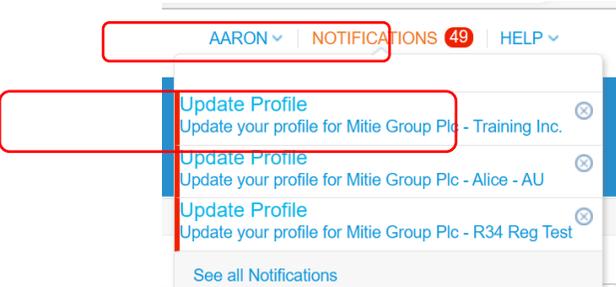
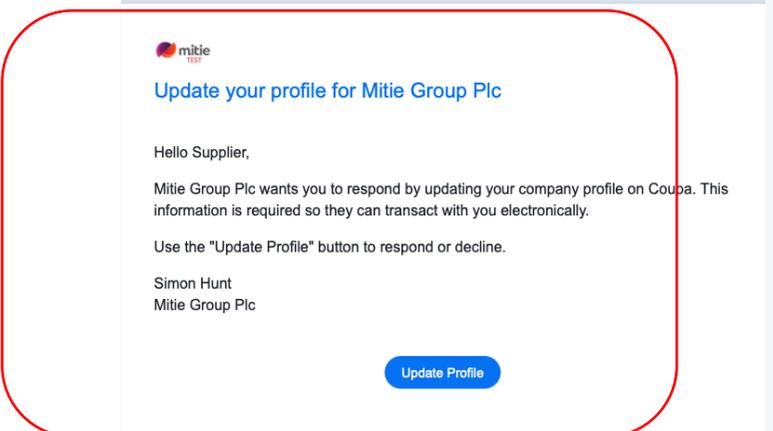
2.

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



<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 and the form will open.</p>	
<p>5.</p> <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

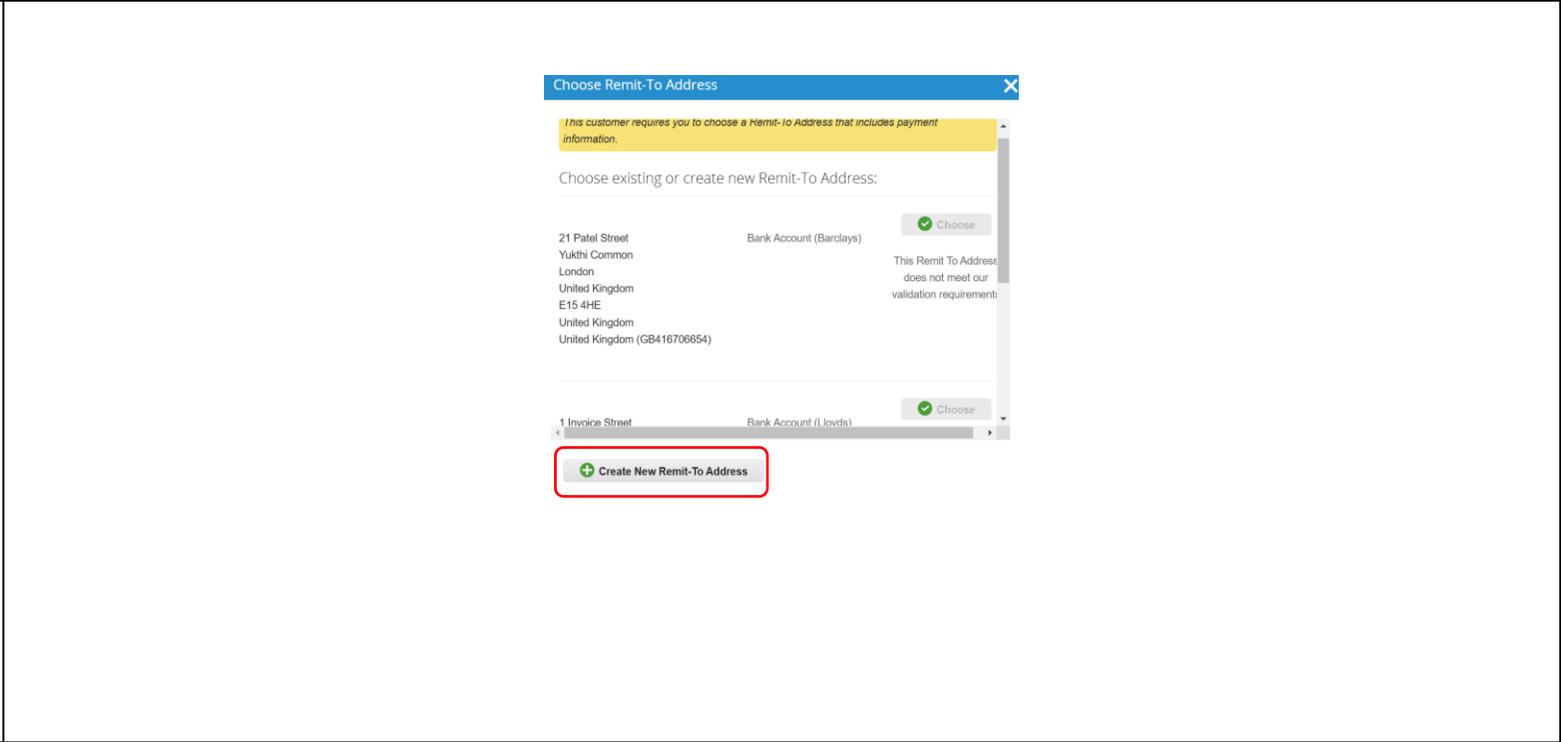
Select basic details update for changes to:

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

<p>7.</p>	<p>Bank & Remit-To Details</p> <p>This section allows you to update:</p> <ul style="list-style-type: none"> • Remit-To Address • Remit-To Email • Bank Account Details 	<p>When there are changes to your bank / remit -to please ensure you follow these steps:</p> <ol style="list-style-type: none"> 1. Attach company headed paper with new account details and signatory 2. Change status of current bank details and remit-to details from Active to Inactive 3. Click add Remit-To button to provide new bank details 4. Your new details will now show as an additional <u>Active</u> Remit-To with previous <u>Inactive</u> Remit-To section 5. Enter remit-to email address details <p>Note: your current remit to address will be greyed out and non-editable – this needs to be changed to inactive</p>
<p>8.</p>	<p>Preferred Currency- use the dropdown to select your preferred currency</p>	<p>Preferred Currency</p> <p>GBP</p>
<p>9.</p>	<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>
<p>10.</p>	<p>click Add Remit-To</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. 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.
If you were able select Choose go to section 20
If not Click **Create New Remit To-Address**

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.



12. **Creating New Remit To-Address - Under the section Where is our business located?** choose your legal entity name (Your registered Company Name) and select your country

The screenshot shows two form fields. The first field is labeled '* Legal Entity Name' and contains the text 'Training 1'. The second field is labeled '* Country/Region' and contains the text 'United Kingdom' with a downward arrow indicating a dropdown menu.

13. Under the section **Miscellaneous Information** 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)

Note: Depending on the country/region chosen, more mandatory information may be required in this section.
Board of Directors is not mandatory.

* Legal Entity Name Training 1

* Country/Region United Kingdom

* Type of Company Limited *i*

Board of Directors *i*

14. 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.

You can enter a new address or click the drop down under **Use an existing address**. This will auto fill the address fields.

The address can be used for the Remit To and Ship from address

What address do you invoice from?

Use an existing address Select

* Address Line 1 Select
GB, 21 Patel Street, London

Address Line 2

* City

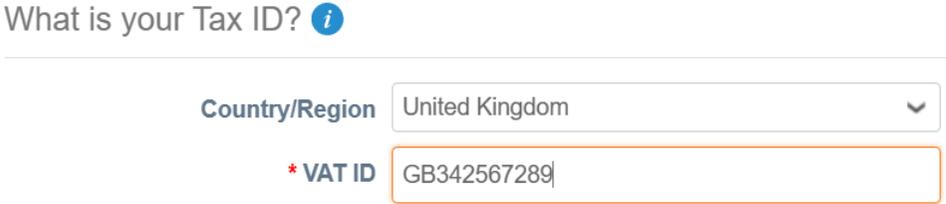
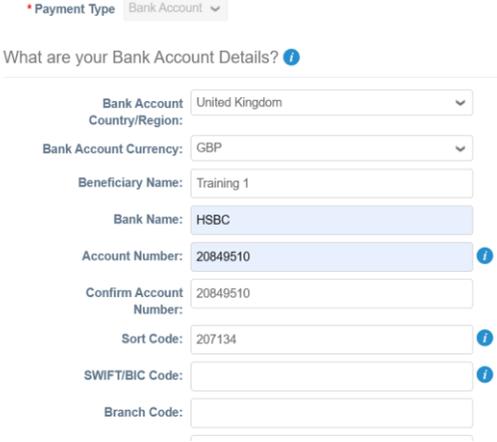
State

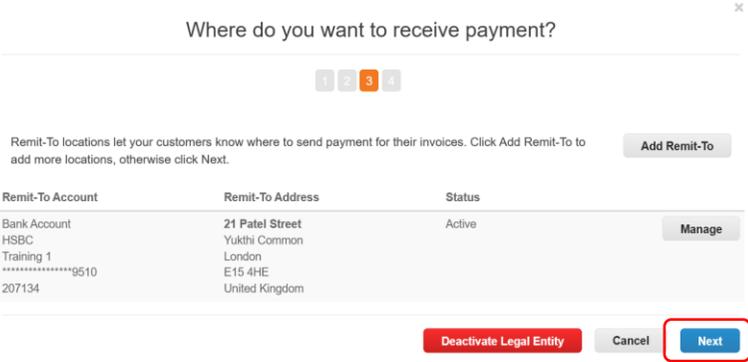
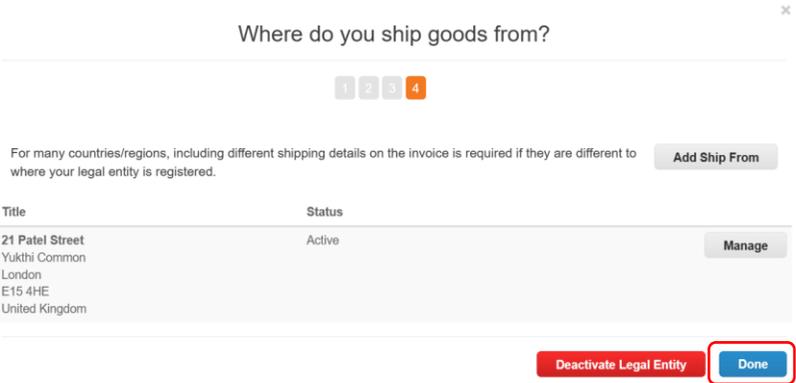
* Post Code

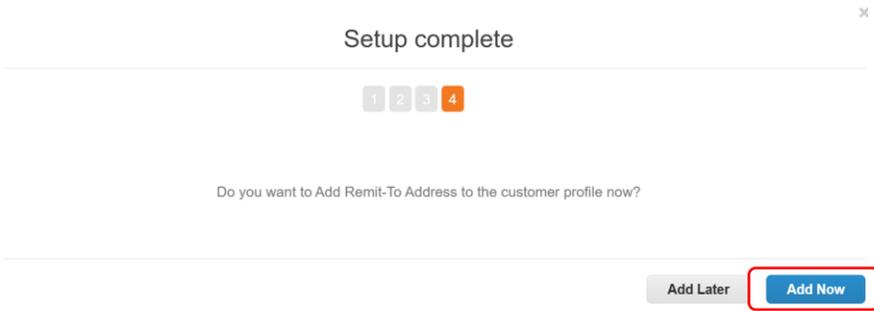
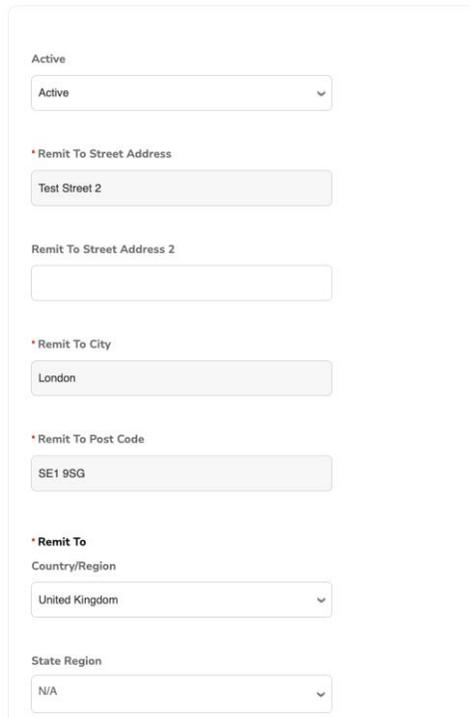
Country/Region United Kingdom

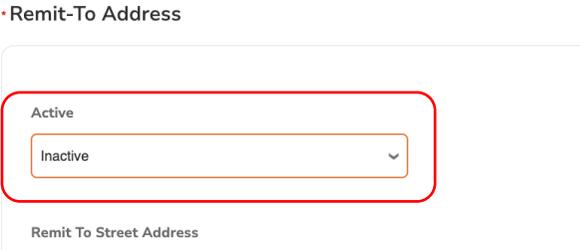
Use this address for Remit To *i*

Use this for Ship-From address *i*

<p>15.</p>	<p>Under What is your Tax ID, add you VAT ID Note: Coupa will validate the format but will not validate the actual ID Scroll to the bottom and click Save & Continue</p>	
<p>16.</p>	<p>Payment type: use the drop down to select bank account.</p> <p>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>17.</p> <p>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>	 <p>What is your Remit-To Address?</p> <p>Address Line 1 21 Patel Street</p> <p>Address Line 2 Yukthi Common</p> <p>City London</p> <p>State</p> <p>Post Code E15 4HE</p> <p>Country/Region United Kingdom</p>								
<p>18.</p> <p>Where do you want to receive payment? This page is a snapshot of the Remit-To Account and Remit-To Address.</p> <p>Click Next</p>	 <p>Where do you want to receive payment?</p> <p>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.</p> <table border="1"> <thead> <tr> <th>Remit-To Account</th> <th>Remit-To Address</th> <th>Status</th> <th></th> </tr> </thead> <tbody> <tr> <td>Bank Account HSBC Training 1 *****9510 207134</td> <td>21 Patel Street Yukthi Common London E15 4HE United Kingdom</td> <td>Active</td> <td>Manage</td> </tr> </tbody> </table> <p>Deactivate Legal Entity Cancel Next</p>	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
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						
<p>19.</p> <p>Where do you ship goods from? A snapshot if the ship from address</p> <p>Click Done</p>	 <p>Where do you ship goods from?</p> <p>For many countries/regions, including different shipping details on the invoice is required if they are different to where your legal entity is registered.</p> <table border="1"> <thead> <tr> <th>Title</th> <th>Status</th> <th></th> </tr> </thead> <tbody> <tr> <td>21 Patel Street Yukthi Common London E15 4HE United Kingdom</td> <td>Active</td> <td>Manage</td> </tr> </tbody> </table> <p>Deactivate Legal Entity Done</p>	Title	Status		21 Patel Street Yukthi Common London E15 4HE United Kingdom	Active	Manage		
Title	Status								
21 Patel Street Yukthi Common London E15 4HE United Kingdom	Active	Manage							

<p>20.</p>	<p>Set Up Complete</p> <p>Click Add Now</p>	
<p>21.</p>	<p>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>You will need to update the applicable editable fields i.e. State, remit-to contact email. Bank info if required, bank address.</p>	

<p>22.</p>	<p>If you scroll past your new Remit-to section you will see your old Remit to section, it is important that you update the old remit-to section from Active to Inactive</p> <p>Failure to change this will result in your form being rejected.</p>	
<p>23.</p>	<p>If you are only updating Bank & 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/> <p style="text-align: right;"> Decline Save Submit for Approval </p>
<p>24.</p>	<p>Insurance Details Update</p> <p>This section allows you to update:</p> <ul style="list-style-type: none"> • Employers Liability Insurance • Public/Production Liability Insurance • Professional Liability Insurance 	<p>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</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?

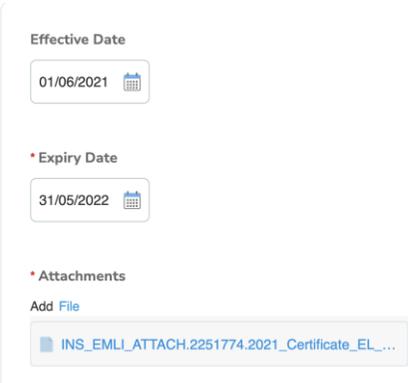
Public/Product Liability Insurance

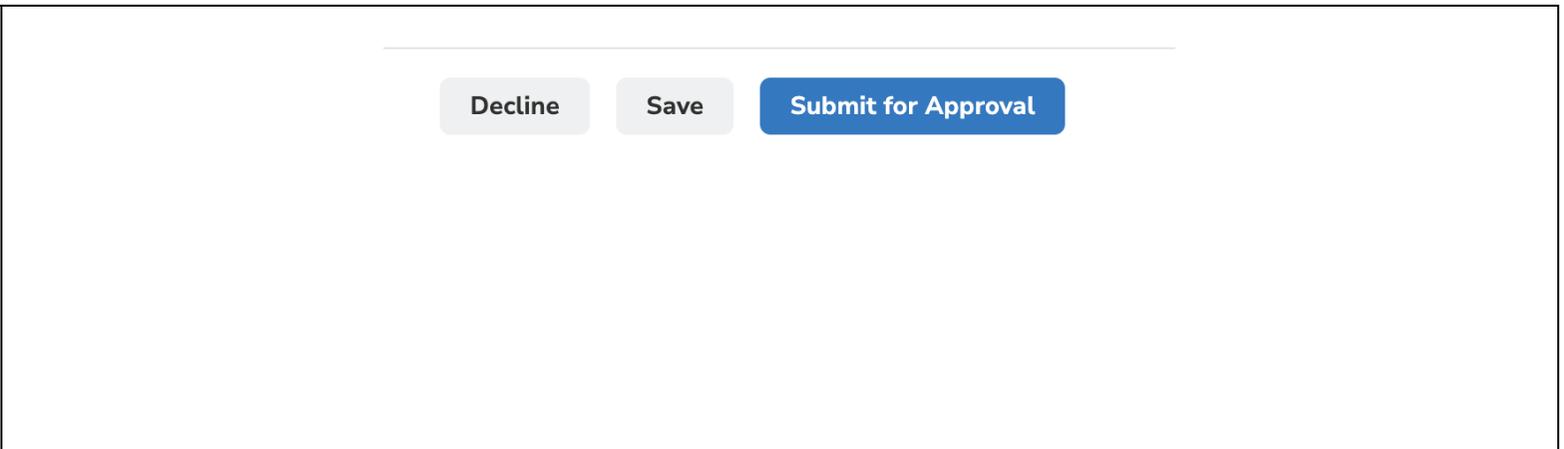
* Do you have Public/Product Liability Insurance?

Professional Liability Insurance

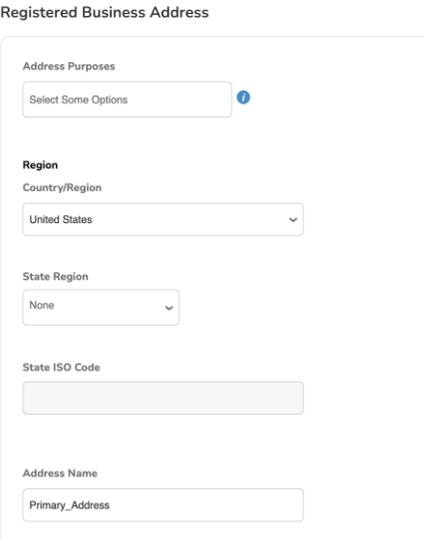
* Do you have Professional Liability Insurance?

<p>26.</p>	<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> <p>No <input type="button" value="x"/> <input type="button" value="v"/></p> <p>* Why do you not have Employers Liability insurance?</p> <p><input type="text"/></p>
<p>27.</p>	<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> <p>No <input type="button" value="x"/> <input type="button" value="v"/></p> <p>* Please state the value of employers liability insurance</p> <p>£5,000,000.00 <input type="text"/></p> <p><small>This field must be populated with a numerical entry. Example: £5,000,000.00</small></p>

<p>28. 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>	 <p>Effective Date</p> <p>01/06/2021</p> <p>* Expiry Date</p> <p>31/05/2022</p> <p>* Attachments</p> <p>Add File</p> <p>INS_EMLI_ATTACH.2251774.2021_Certificate_EL_...</p>
<p>29. 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>	<p>* Have there been any claims made against this policy?</p> <p>Select</p>

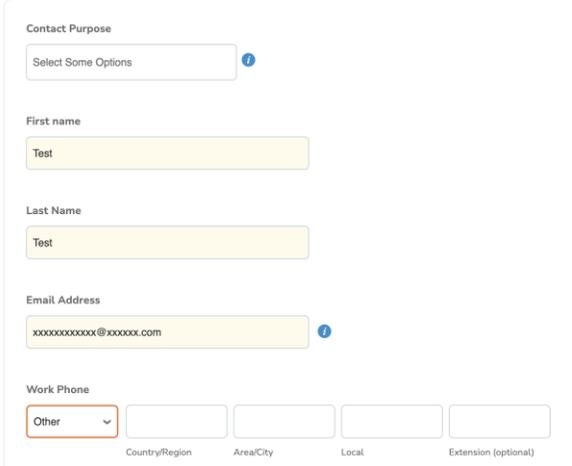
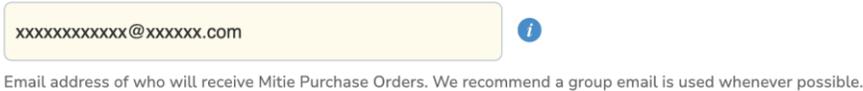
30.	<p>If you are only updating Insurance details Check the form carefully and click submit for Approval.</p> <p>You can Save at any time and come back to the form. If you click Decline, Mitie will be informed, and you may be blocked as a supplier.</p>	 <p>The screenshot shows a horizontal line above three buttons. From left to right: a light gray button labeled 'Decline', a light gray button labeled 'Save', and a blue button labeled 'Submit for Approval'.</p>
31.	<p>Basic Details Update</p> <p>This section allows you to update:</p> <ul style="list-style-type: none">• Name• Primary Address• Contact Email• Tax Details• Classification & Accreditation Details <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.</p> <p>Note: If you have changed company name with a different company registration number, Mitie will require you to be set up as a new supplier.</p>	

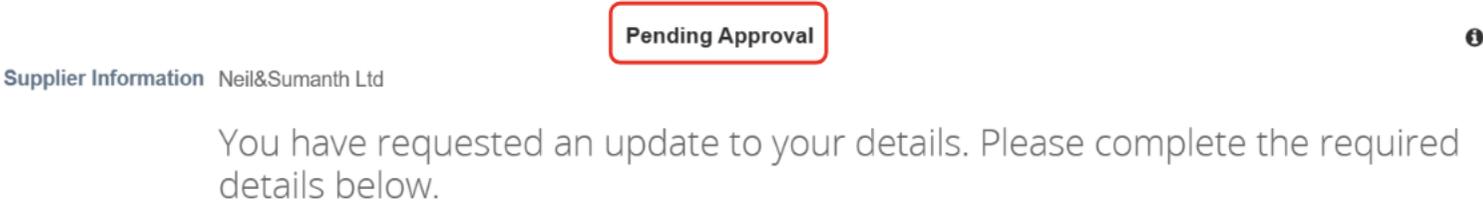
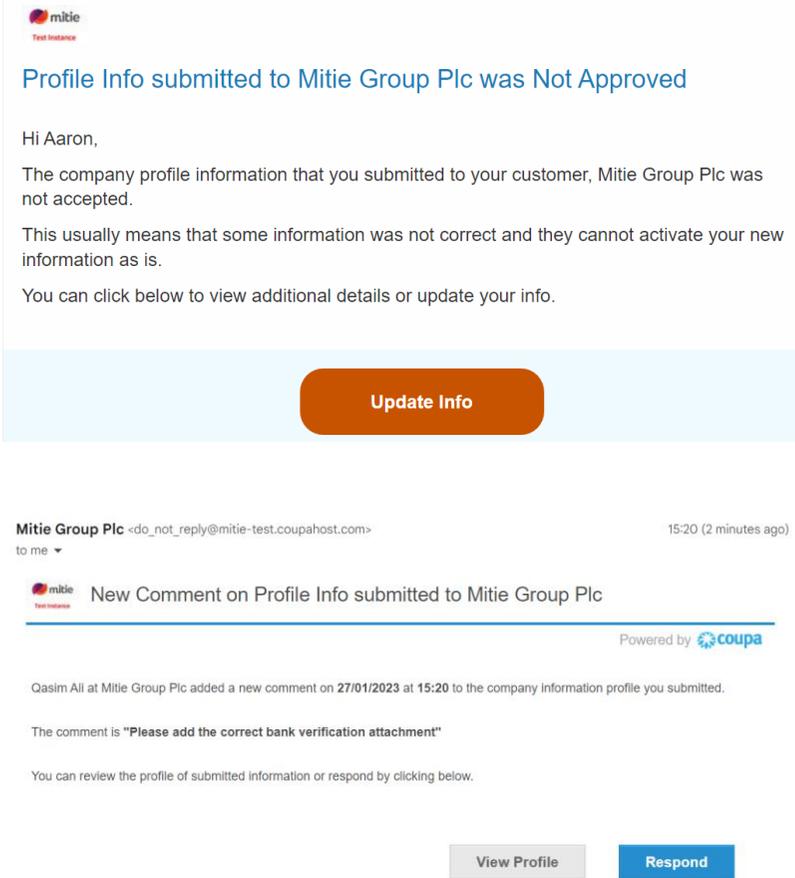
32.	<p>Alcumus Number -If you provide services onsite then it is a Mitie requirement that you need to be registered and fully accredited with Alcumus prior to commencing any work for Mitie. Please refer to https://www.safecontractor.com to register if you do not have an Alcumus number If you do not fit this criteria leave blank</p>	<p>Alcumus Number</p> <input data-bbox="1077 261 1644 327" type="text" value="UK1234"/>
33.	<p>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.</p>	<p>• Supplier Name</p> <input data-bbox="958 719 1339 762" type="text" value="TEST SUPPLIER LTD"/> <p><small>Please add your supplier name in capitals. E.g NEW SUPPLIER LIMITED. Name should be added as per the registered name on companies house</small></p> <p>• Display Name</p> <input data-bbox="958 874 1339 917" type="text" value="TEST SUPPLIER LTD"/> <p><small>Please add your supplier name again here in capital letters</small></p>

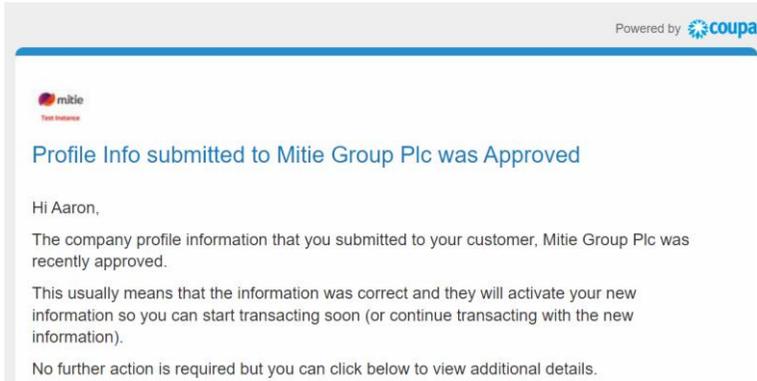
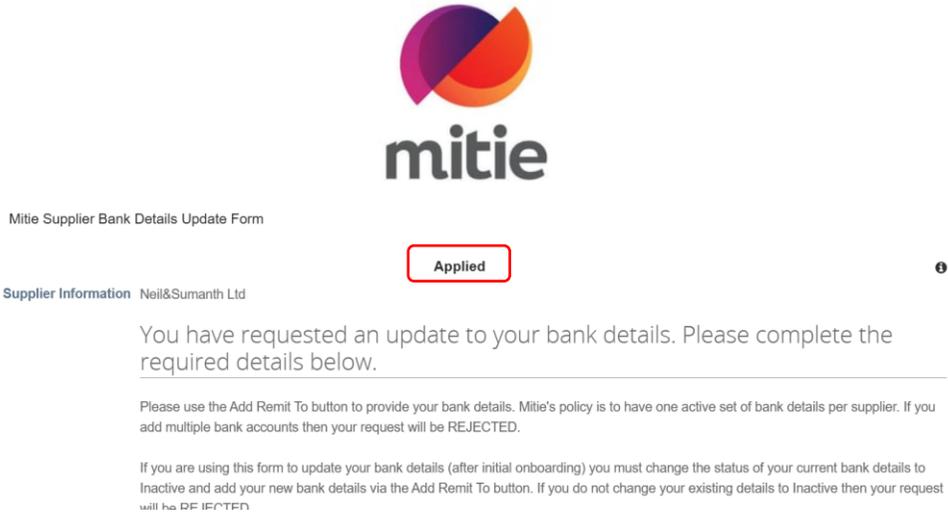
<p>34.</p>	<p>Registered Business Address</p> <p>Update or complete the relevant fields for your registered business address, ensuring you have selected the correct country and state region.</p>	
<p>35.</p>	<p>Supplier Type</p> <p>Select one of the drop-down options.</p>	
<p>36.</p>	<p>Company Registration Number</p> <p>For UK suppliers this must be an 8 digit number e.g: 12345678</p>	

37.	<p>UK National Insurance Number Only required for a UK Sole Traders</p>	<p>UK National Insurance Number</p> <input data-bbox="1115 229 1619 288" type="text"/> <p>Only required for a UK Sole Traders</p>
38.	<p>Organisation Size Select one of the drop-down options.</p>	<p>Organisation Size</p> <div data-bbox="1137 459 1603 635" style="border: 1px solid #ccc; padding: 5px;"> <p>✓</p> <p>Micro (<10 Staff and <£1.75m Turnover)</p> <p>Small (<50 Staff and <£8m Turnover)</p> <p>Medium (<250 Staff and <£45m Turnover)</p> <p>Large (>250 Staff and >£45m Turnover)</p> </div>
39.	<p>Waste Carrier Licence If you are registered as a professional carrier and transporter of waste (add registered number) If not leave Blank</p>	<p>Waste Carrier Licence</p> <input data-bbox="1010 770 1505 826" type="text"/> <p>If you are registered as a professional carrier and transporter of waste (add registered number)</p>
40.	<p>Tax Details</p> <p>Country of Operation Select your country of operation.</p>	<p>Country of Operation</p> <div data-bbox="965 1086 1756 1177" style="border: 1px solid #ccc; padding: 5px;"> <p>United Kingdom ▾</p> </div>

<p>41.</p> <p>VAT / Tax Number</p> <p>Please enter your Tax code with country prefix and no spaces e.g:</p> <ul style="list-style-type: none">• GB123456789• FR12345678901• DE123456789 <p>If you don't have a VAT / TAX number leave blank</p>	<p>VAT / Tax Number</p> <input data-bbox="1070 240 1677 311" type="text"/> <p>Please enter your Tax code with country prefix: e.g:</p> <ul style="list-style-type: none">• GB123456789• FR12345678901• DE123456789
<p>42.</p> <p>Unique tax reference (UTR) Number & your registered trading name as registered with HMRC</p> <p>Only required for Construction Industry Scheme (CIS) registered suppliers to complete if not leave blank</p>	<p>Unique tax reference (UTR) Number</p> <input data-bbox="1099 735 1449 775" type="text"/> <p>Only required for Construction Industry Scheme (CIS) registered suppliers</p> <p>Please provide suppliers CIS/UTR registered trading name as registered with HMRC</p> <input data-bbox="1099 884 1449 924" type="text"/> <p>Only required for Construction Industry Scheme (CIS) registered suppliers</p>

<p>43.</p>	<p>Provide Point the supplier primary point of contact.</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>44.</p>	<p>PO Email</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>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>46.</p>	<p>The form is now with Mitie in Pending Approval status. Mitie will review the details and either Approve or Reject</p>	
<p>47.</p>	<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 Respond button</p>	
<p>48.</p>	<p>The form will be open for edit so you can edit any details and re-submit</p>	

<p>49. If your details are approved, you will receive an email confirming the information you have submitted has been approved.</p>	
<p>50. The Supplier Update form will be in Applied status.</p> <p>Nothing further is required, and the bank details update is complete.</p>	

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