

# How to Complete the CBRE Supplier Onboarding Form

# Purpose:

The purpose of this help guide is to provide instruction for completing and making changes to the CBRE Supplier Onboarding Form.

# Scope:

- Navigating to the Onboarding Form (after creating a new profile)
- Navigating to the Onboarding Form (existing profile)
- Completing the Onboarding Form
- Submitting Banking Details
- Submitting the Onboarding Form
- Withdrawing or correcting the profile submission
- Re-submitting the application if bank/utility details could not be validated
- What if the DIRO Verification ID could not be validated?
- Re-submitting the application if Moody's can't match your BVDID

# Navigating to the Onboarding Form

After the initial log in screen, an onboarding sequence will appear requesting details about your company. If you wish to skip these screens and update your profile another time, click **"Skip for Now".** 

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On the final Coupa Supplier Portal (CSP) screen you will see a button that says, **"Take Me There"**, selecting this will take you directly to the onboarding form. If you select "Skip for Now" on this screen, you will be taken back to the CSP homepage.



myBuy	CBRE requires some additional information
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#### Navigating to the Onboarding Form from the CSP Homepage (existing profile)

If you already have a CSP profile, you can access the Onboarding Form directly from your profile.

From your profile click on > **Information Requests.** Then select 'CBRE' from the profile dropdown menu. Any pending Information Requests will appear on the page.

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CBRE			Profile	CBRE			•
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Supplier Information							
Supplier							
Dear Supplier,							
If this is your first time registering with CBRE t ensuring mandatory questions (marked with an and following the instructions below.	do business with this client/a asterisk) are answered. Once	ccount, please se a onboarded, you	lect the 'New Supplier' button will have the ability to edit your	Please complet information by o	e the onboarding coming back to th	g form his page	
If you are an existing supplier returning to the that you can update and submit.	ortal to update your profile inf	ormation, please	select the "Update" button. The	form will popula	te with editable f	fields	
* Please select the service type							
Select if you're a new supplier for CBR Select if you're updating your profile in	i formation						

#### **Completing the Onboarding Form**

On the **Information Request** page, you are first asked to indicate whether you are a new supplier to CBRE or are an existing supplier and you just want to update your profile information.

Please ensure the option selected for Service Type is appropriate. Only select "updating profile information" if you have an existing profile with CBRE and would like to make changes.

Then complete the onboarding form in its entirety. Some questions may require input of registration IDs or ask for attachments to be uploaded. Suppliers shall answer each question to the best of their ability.



#### Information Requested Includes:

• Legal Entity Details

* Registered Business Name		
* Trading Name or Doing Business As Na	ne	
Your Business Website		
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* Preferred email address for Purchase C	rders	
	0	
This secol address will be used by CDDC to issue	Rurchasa Orders (ROs) to your bus	iness Diesse use a generic email if nossible

• W9 Form Upload (US Only)

mm/dd/yy		
* Expiration Date		
mm/dd/yy		
* Attachments		
None		
Description		
Description		

• Contact Details

Contact Purpose			
Select Some Option	s	0	
First Name			
Last Name			
Email address			
		0	
Mobile Phone			
Mobile Phone			



#### • Secondary Contact Details

Select Some Options  First Name  Last Name  Email address  Mobile Phone US/Canada	Select Some Options	* Contact Purpose	
* First Name  * Last Name  * Last Name  * Email address  * Mobile Phone US/Canada	*First Name *Last Name *Last Name *Email address *Email address US/Canada US/Canada G *Woble Phone US/Canada US/Canada	Select Some Options	0
*Last Name *Email address  *Mobile Phone US/Canada	*Last Name *Email address  *Mobile Phone US/Canada v 650-555-1212 *Work Phone	* First Name	
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# • Business Registered Address

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siness Registered Address		
Address Purpose		
Select Some Options	0	
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Country Region		
United States	~	
State Region		
None	~	
State ISO Code		
State 150 Code		
Address Name		
Course Address		

• Other Address (if Applicable)

Address Purpose		
Select Some Options	0	
Region		
Country/Region		
United States	~	
State Region		
None	~	
State ISO Code		
Address Name		
Street Address		
Street Address 2		



#### • Insurances, Licenses and Permits

Does your business have, and wil to CBRE and/or its clients?	hold for the duration of the engagement w	vith CBRE, the required licenses, pe	ermits, and insurances to provide goods and services
* Select answer			
Select	~		
Holding the required licenses, per withdrawn. Please confirm that yo	mits, and insurances is a condition of doing ur business holds the required licenses, pe	g business with CBRE. If you do not armits, and insurances as required b	t meet this requirement your registration will be by CBRE.
Please confirm below that you are	authorized to submit this information on b	ehalf of the business.	

You can "Save" your progress at any time if you need to exit the form. The form needs to be completed, reviewed, and submitted within 30 days of receipt.

# **Submitting Banking Details**

Suppliers are required to submit the company's banking information in the Supplier Onboarding form. To verify this data, CBRE utilizes a 3rd party, DIRO. Once the information has been verified by DIRO, the supplier will receive a verification number which must be entered on the SIM form.

Within the Onboarding form, use the link provided to be taken directly to the DIRO page. **Save your onboarding form before clicking the DIRO link.** On the DIRO page, re-enter the data that was provided on the onboarding form, the system will evaluate the submitted data and if no errors, will generate a verification number.

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Bank Country/Region	United States	•		This information will be recorciled against the name that ap
* Account Name	Pő Networka			that should be entered into this field.
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# **Accessing DIRO**

No account creation is required within DIRO -- only a valid email address. After pressing **"Go"** the next page will request Utility Bill Verification and Bank Account Verification. Complete each, and if additional time is needed to gather the info, save your progress and exit.

Users returning to the DIRO page may enter their email address on the **"Continue with Verification"** side of the screen to complete the submission. The submission ID will appear on the page once all the data is submitted, and a confirmation email is sent to the user. Log into the DIRO page by adding your email address (should be the same one used for CSP).

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Start <u>new</u> verification (first time only)	<u>Continue</u> with verification (see status page)
Email	Email used earlier Go

# Generating the DIRO Verification Number/ Submission ID

Once you're logged in you will see the below screen. On the left you can find some useful information, a link to our training material, and some Frequently Asked Questions (FAQs).

To start the verification process, click on the green buttons to verify your address and bank account details.

CBRE Bank account and address verification in vendor onboarding	owered by đ/(Q
Bank account and address verification in Vendor onboarding	Click the green buttons to start
To ensure both timely and accurate payments to CBRE's vendors, and to reduce the risk of fraud, we ask you to verify bank account ownership and proof of address.	Address verification Verification code
CBRE partners with <u>DIBO</u> for this process, the leading provider of bank and address verification solutions trusted by F500 and Tier 1 global banks.	Bank account verification
Review the CBRE training_materials to familiarize yourself with the vendor onboarding process.	Сору
Frequently asked questions	
+ What information will be shared?	Get support
+ How does my password remain private?	
+ Why should I trust DIRO?	
+ How DIRO creates a new global standard?	
Learn more about DIRO's <u>bank account</u> and address <u>verification</u> solutions.	
Terms of Use, Privacy Policy,	
	Powered by OlifO

# a) Address verification

When you click on "Address verification" you will be asked to select your utility provider. Make sure the correct country is selected.

	Select your utility provider		
	Q Search (Internet, telephone, electricity		
	etway Comcast Corp	>	
	ATT Inc	>	
	Union Senitary District	>	
	California Department of Water Resources	>	
	Pioneer Community Energy		

Once you've found your provider and clicked confirm you will see the following screen which shows an overview of the next steps and confirms that only name, account number and address will be shared with CBRE.



Please click "Confirm". You will then be taken to the login page of your utility provider. Please log into your account and then download your latest utility statement.



The system will then automatically pull the relevant information over into Coupa without you having to re-upload anything. Only name, account number and address will be shared with CBRE. Then click "**Submit**". This will complete the address verification.



# b) Bank verification

To verify your bank details, click on the second green button "Bank account verification".





Like the address verification process you will then be asked to select your bank and confirm.

Select your bank		
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Chase Bank	>	
Bank of America	>	
Wells Fargo Bank	,	
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Only name, account number, address and routing number will be shared with CBRE.

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Click "Confirm". You will then be taken to the login page of your bank. Please log into your account and then download your latest bank statement.



The system will then automatically pull the relevant information over into Coupa without you having to re-upload anything. Only name, account number, address and routing number will be shared with CBRE. Then click "**Submit**". This will complete the bank account verification.

# c) Generating the DIRO Verification Number

After completing both verifications, a Verification Number will automatically be generated. A copy will be emailed to you at the email- address provided. You can then click on the little "copy" icon to copy the number and then enter the **ID into the DIRO Verification Number field found on the Supplier Onboarding Form.** 



CBRE Bank account and address verification in vendor onboarding Po	wered by OÎ(O		
Bank account and address verification in vendor onboarding	Address verification	Verification code	
To ensure both timely and accurate payments to CBRE's vendors, and to reduce the risk of fraud, we ask you to verify bank account ownership and proof of address.		8 A T Z H N	പ
CBRE partners with <u>DIRO</u> for this process, the leading provider of bank and address verification solutions trusted	Bank account verification	,	Cepy
by F500 and Tier 1 global banks. Review the CBRE <u>training materials</u> to familiarize yourself with the vendor onboarding process.	Add another bank account	To finalize your submission on the Coupa plath for CBRE, click the 'copy link' next to the verific code or refer to the code we've sent to your en	orm cation mail.
Frequently asked questions			
+ What information will be shared?			
+ How does my password remain private?			
+ Why should I trust DIRO?	Get support		
+ How DIRO creates a new global standard?			
Learn more about DIRO's bank account and address verification solutions.			
Terms of Use, Privacy Policy,			
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If you need support or are facing any challenges with the DIRO platform you can click on the "**Get support**" button and outline your request and someone will get back to you.

Bank account and address verification vendor onboarding		Gets	upport	×		
To ensure both timely and accurate payments t vendors, and to reduce the risk of fraud, we ask yo bank account ownership and proof of address.	Can't find my website	~	Describe your issue		fication code	
CBRE partners with DIEO for this process, th provider of bank and address ventication solution by F500 and Ter 1 blobal banks.	Can't login	~				n
Review the CBRE training materials to familiarize with the vendor onboarding process.	Can't download	~				Copy
Frequently asked questions	O Other issue					
+ What information will be shared?			-			
+ How does my password remain private?			h Su	bmit		
+ Why should I trust DIRO?						
+ How DIRO creates a new global standard?						
Learn more about DIRO's bank account and address verification solutions.						

#### **Submitting the Onboarding Form**

Once everything has been completed and the Onboarding Form has no errors, the '**Submit for Approval'** button will appear. After hitting the submission button, the form will be in "**Pending Approval**" status.

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# Withdrawing or correcting the profile submission

It is possible to withdraw the form or submit changes at any point while the status is "**Pending Approval**". Once approved, the submission cannot be withdrawn. You can send updates to CBRE anytime if the onboarding form is still in pending approval status.

Go to **Profile > Information Requests**, **Click Withdraw**, and make your changes. If everything looks good, click **Submit for Approval**.



	Withdraw
🧖 Comments	Mute Comments
Enter Comment	
Add File I URL	1

# Re-submitting the application if bank/utility details could not be validated

In case CBRE could not validate your bank/ utility details please check the information submitted and update your DIRO Verification ID (if needed) before re-submitting for approval.

# What if the DIRO Verification ID could not be validated

In case CBRE is unable to match your information with the DIRO verification number provided, please review, and correct the DIRO verification ID on your CBRE Profile Information on the Coupa Supplier Portal and resubmit for approval.

# Re-submitting the application if Moody's can't match your BVDID

CBRE uses Moody's as its third-party risk aggregator. In case CBRE is unable to match your business with an entity in the Moody's database you will be asked to review your CBRE Profile Information on the Coupa Supplier Portal and resubmit for approval. Log into your profile as described above and confirm the Business name, Tax ID and business address are all correct and update any errors. Re-submit the form even if no changes were made.

Please refer to '4 - Help Guide - Researching Status and Compliance within the CBRE-Coupa Portal' for further guidance on next steps.