

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”**.

The screenshot shows a web form titled "myBuy Your Contact Information". The form has several input fields: "First Name" (with "Cu" entered), "Last Name" (with "Avellino" entered), "Phone Number", "Country/Region" (a dropdown menu), "Business Address", "City", "State", and "Postal Code". At the bottom of the form is a large blue button labeled "Next". Below the "Next" button, the text "Skip for Now" is visible and circled in red.

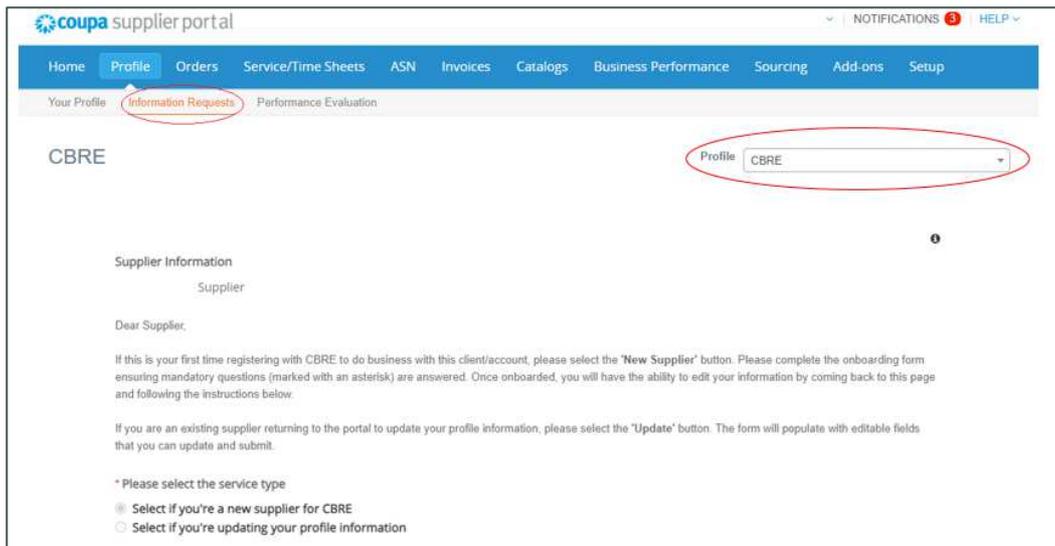
On the final Coupa Supplier Portal (CSP) screen you will see a button that says, **“Take Me There”**, selecting this will take you directly to the onboarding form. If you select **“Skip for Now”** on this screen, you will be taken back to the CSP homepage.



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.



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**

LEGAL ENTITY DETAILS

* Registered Business Name

* Trading Name or Doing Business As Name

Your Business Website
 ⓘ

* Preferred email address for Purchase Orders
 ⓘ

This email address will be used by CBRE to issue Purchase Orders (POs) to your business. Please use a generic email if possible.

- **W9 Form Upload (US Only)**

Upload your business' W9 form (US Only)

Effective Date

* Expiration Date

* Attachments
None

Description

- **Contact Details**

CONTACT DETAILS

* Contact details of the person completing this form

Contact Purpose
 ⓘ

* First Name

* Last Name

* Email address
 ⓘ

* Mobile Phone
US/Canada

* Work Phone
US/Canada

- **Secondary Contact Details**

Secondary contact details (should the primary contact not be available)

* Contact Purpose
Select Some Options ⓘ

* First Name
[Text Field]

* Last Name
[Text Field]

* Email address
[Text Field] ⓘ

* Mobile Phone
US/Canada [Country/Region] [Text Field]
650-555-1212

* Work Phone
US/Canada [Country/Region] [Text Field]
650-555-1212

- **Business Registered Address**

The Business Registered Address must match the address connected to the Tax Registration entered above.
The Region, Country, State/Region, Street Address, City, and Postal Code are mandatory and marked with an *. All fields not specifically marked with an * are optional (Address Name, Street Address 2, Street Address 3, etc.)
Any changes to the Business Registered Address must be validated with DIRO (Utility Bill Verification).

Business Registered Address

Address Purpose
Select Some Options ⓘ

* Region
Country/Region
United States [Country/Region]

State Region
None [State Region]

State ISO Code
[Text Field]

Address Name
[Text Field]

* Street Address
[Text Field]

- **Other Address (if Applicable)**

Other Address if Applicable

Address Purpose
Select Some Options ⓘ

Region
Country/Region
United States [Country/Region]

State Region
None [State Region]

State ISO Code
[Text Field]

Address Name
[Text Field]

Street Address
[Text Field]

Street Address 2
[Text Field]

Street Address 3
[Text Field]

• **Insurances, Licenses and Permits**

INSURANCES, LICENSES AND PERMITS

Does your business have, and will hold for the duration of the engagement with CBRE, the required licenses, permits, and insurances to provide goods and services to CBRE and/or its clients?

* Select answer

Select

Holding the required licenses, permits, and insurances is a condition of doing business with CBRE. If you do not meet this requirement your registration will be withdrawn. Please confirm that your business holds the required licenses, permits, and insurances as required by CBRE.

Please confirm below that you are authorized to submit this information on behalf of the business.

* I confirm the statement above.

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.

The screenshot shows the 'Remit-To Addresses' section of the onboarding form. A 'New Banking Details' form is overlaid on top, containing the following fields:

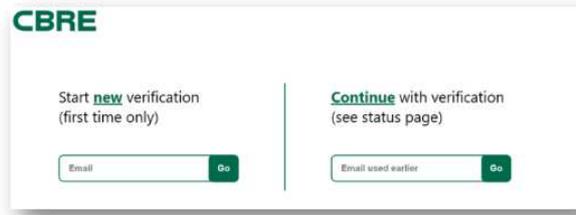
- * Bank Name: Bank of America
- * Bank Country/Region: United States
- * Account Name: F5 Networks
- * Account Number: 5522006143857832
- * Bank Code: 34567
- Swift/BIC Code: [field]

Below the banking details form, there is a 'DIRO Link' field with the URL <https://cbretest.diro.io/> and a 'DIRO Verification Number' field with the value 'e243r3'. The form also includes a disclaimer about DIRO's role in verifying identity and a reminder to save progress before clicking the link.

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.

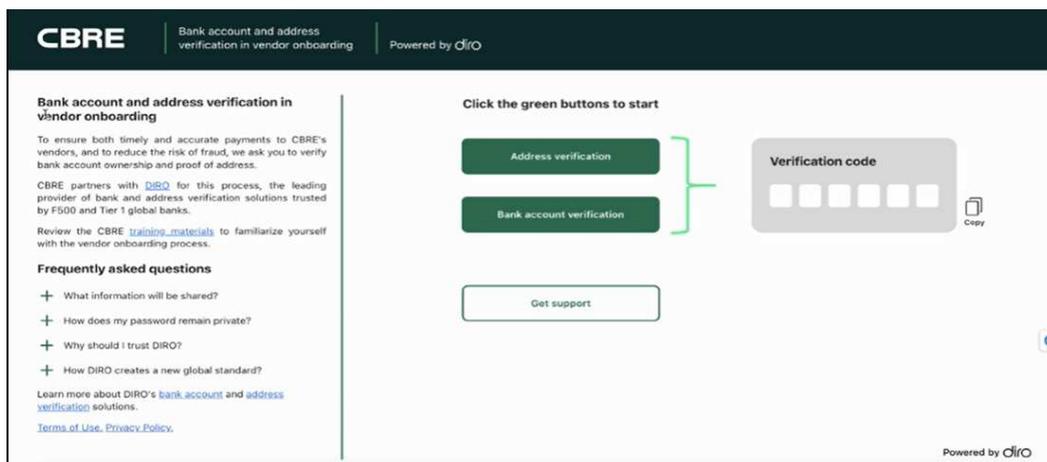
Users returning to the DIRO page may enter their email address on the “Continue with Verification” side of the screen to complete the submission. The submission ID will appear on the page once all the data is submitted, and a confirmation email is sent to the user. Log into the DIRO page by adding your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



Generating the DIRO Verification Number/ Submission ID

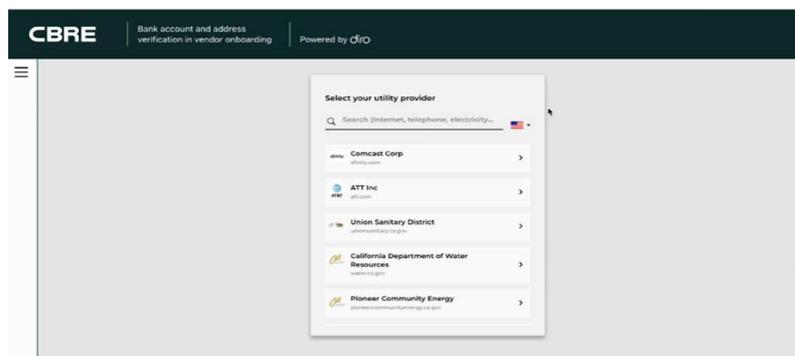
Once you're logged in you will see the below screen. On the left you can find some useful information, a link to our training material, and some Frequently Asked Questions (FAQs).

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

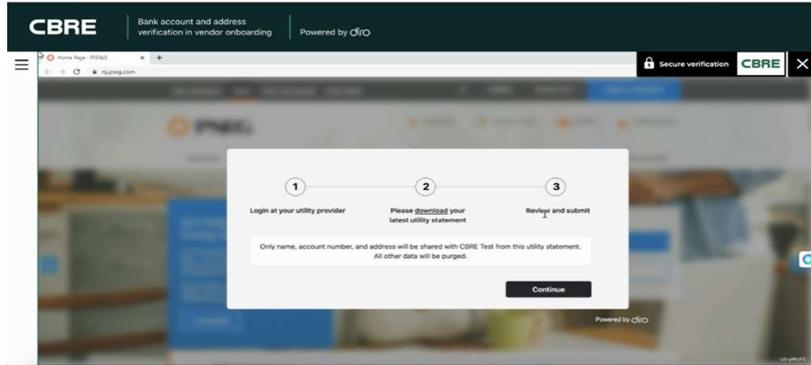


a) Address verification

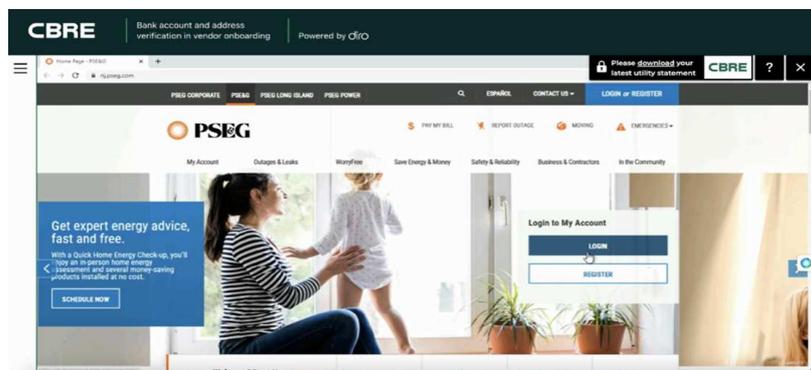
When you click on “Address verification” you will be asked to select your utility provider. Make sure the correct country is selected.



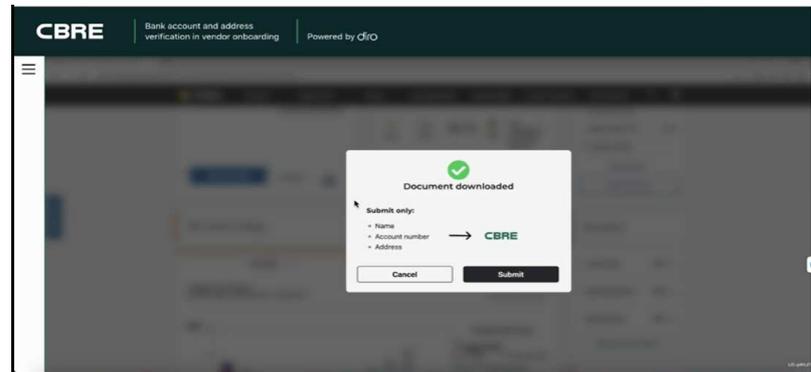
Once you've found your provider and clicked confirm you will see the following screen which shows an overview of the next steps and confirms that only name, account number and address will be shared with CBRE.



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.

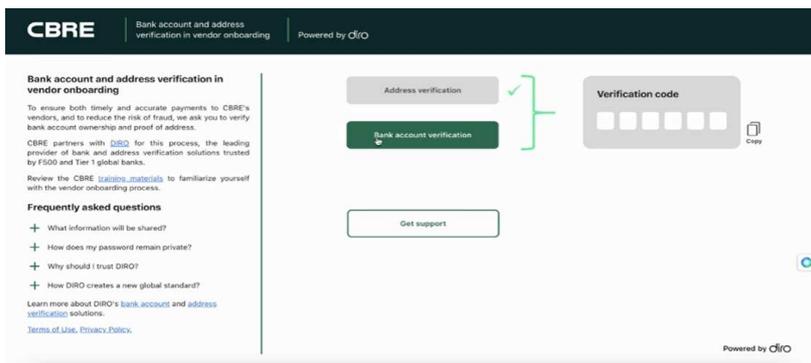


The system will then automatically pull the relevant information over into Coupa without you having to re-upload anything. Only name, account number and address will be shared with CBRE. Then click “**Submit**”. This will complete the address verification.

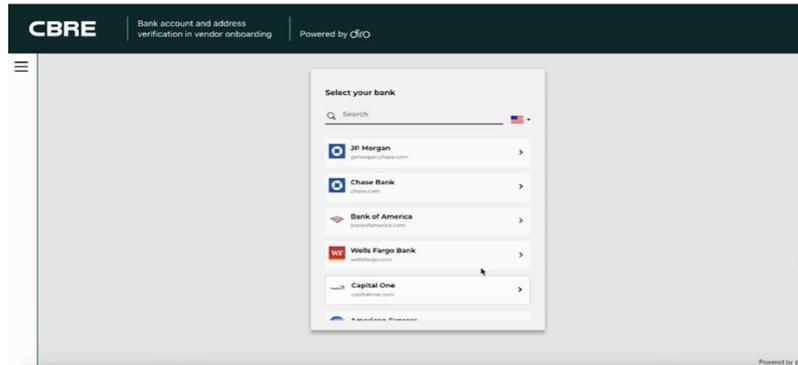


b) Bank verification

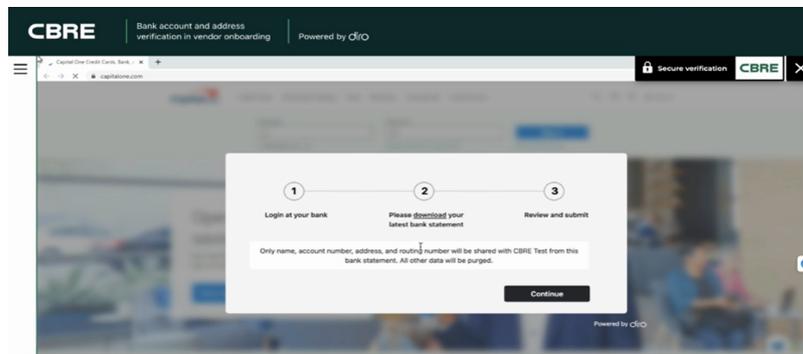
To verify your bank details, click on the second green button “**Bank account verification**”.



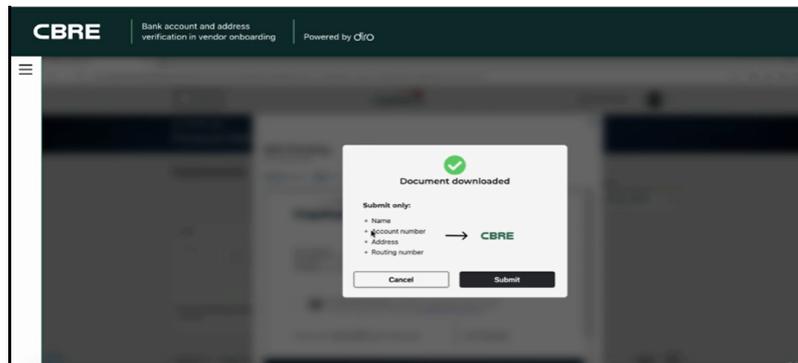
Like the address verification process you will then be asked to select your bank and confirm.



Only name, account number, address and routing number will be shared with CBRE.



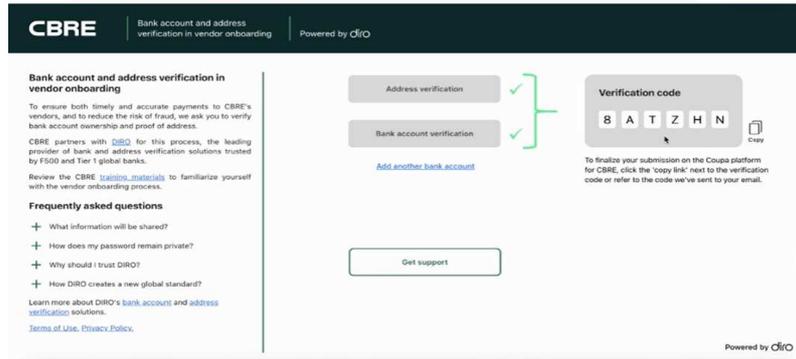
Click “Confirm”. You will then be taken to the login page of your bank. Please log into your account and then download your latest bank statement.



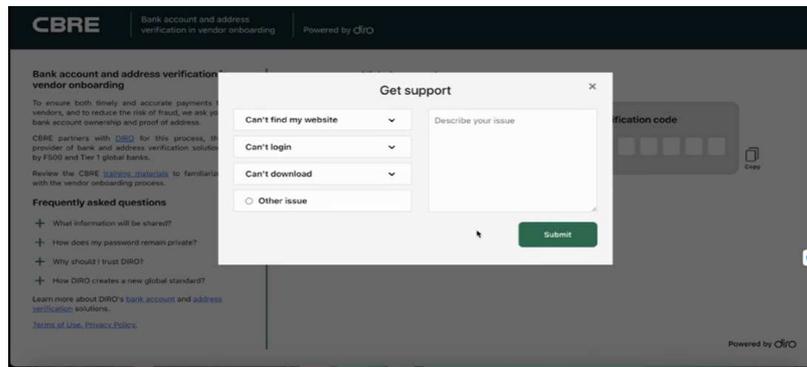
The system will then automatically pull the relevant information over into Coupa without you having to re-upload anything. Only name, account number, address and routing number will be shared with CBRE. Then click “**Submit**”. This will complete the bank account verification.

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.**

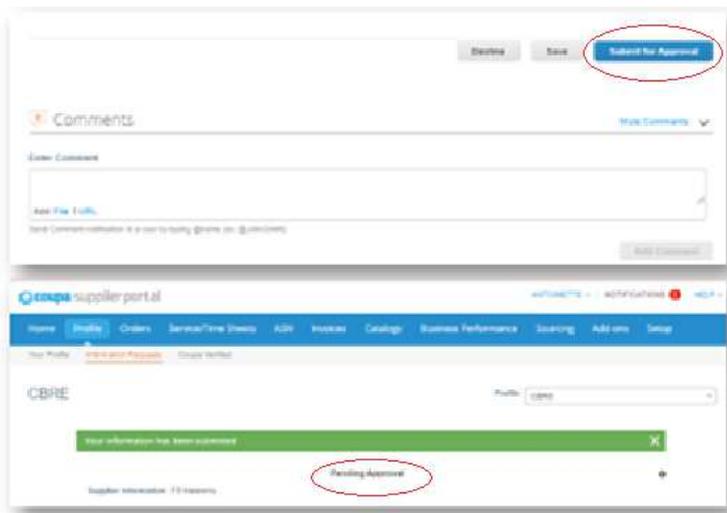


If you need support or are facing any challenges with the DIRO platform you can click on the **“Get support”** button and outline your request and someone will get back to you.



Submitting the Onboarding Form

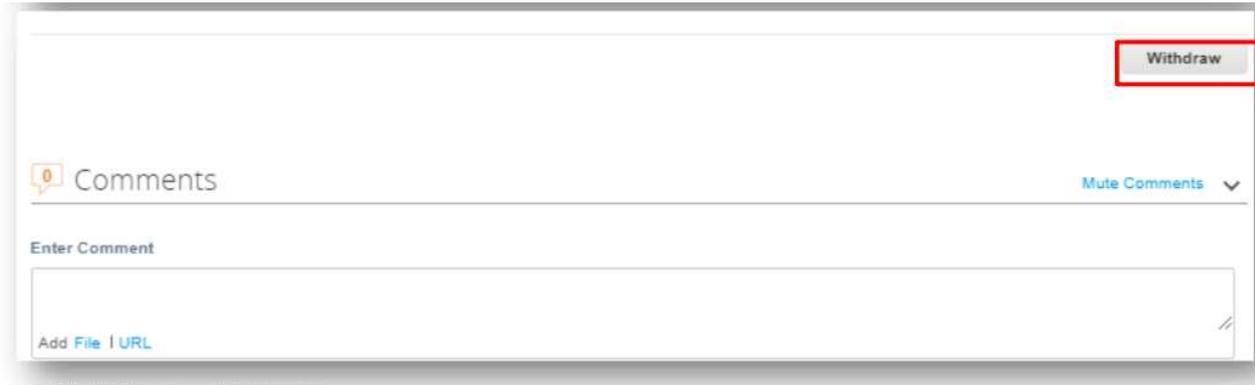
Once everything has been completed and the Onboarding Form has no errors, the **“Submit for Approval”** button will appear. After hitting the submission button, the form will be in **“Pending Approval”** status.



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**.



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.