CBRE mySupplier Guide for suppliers

Dear Supplier,

This guide is intended to provide you with full assistance and knowledge in completing or updating, as well as submitting your mySupplier profile. CBRE mySupplier is the supplier onboarding platform used in the UK and Ireland to onboard suppliers into CBRE finance systems and conduct the supplier due diligence. Therefore, it is mandatory for your company to complete the mySupplier profile in order to become an approved supplier to CBRE and to keep your profile compliant by updating it whenever any document gets expired. This is a condition to have an active account for purchase orders and payments in the CBRE financial systems.

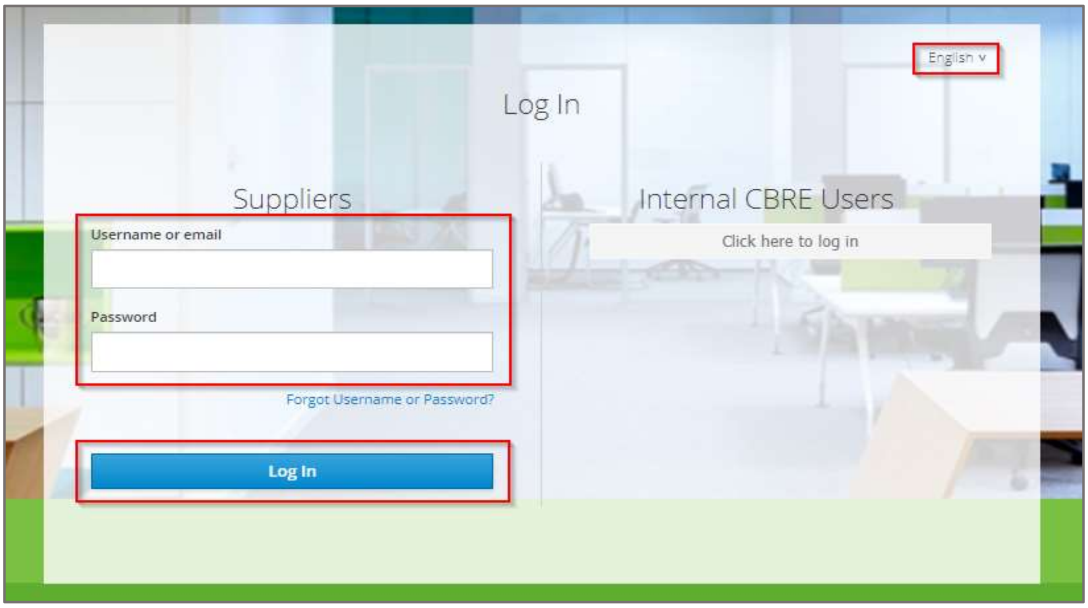
mySupplier

Getting Started

1. Open the “Link to your profile” in the mySupplier email invite, if **profile not yet submitted**,

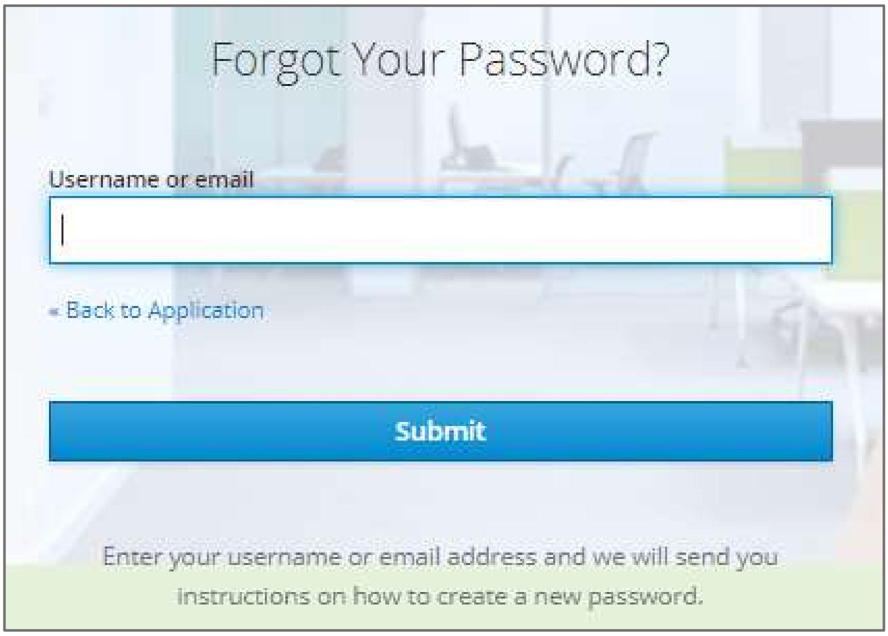
> **Dear Supplier,**
>
> You have been invited to register on mySupplier as part of your CBRE supplier registration process.
>
> mySupplier will be your central repository for storing and managing your certificates and insurance documents on an annual basis. The portal shall provide you with reminder notifications when certificates are due to expire and you can also update your service capability profile should this change.
>
> The registration process requires you to upload your company policy documents, insurance certificates and financial information. It is suggested that this information is gathered prior to you undertaking your registration to reduce time and simplifying your submission.
>
> Your username is ______________________
>
> In order to set up your new password click the following link: Click here to update your account. This link will expire within 7 days.
>
> **What happens next?**
>
> Once submitted, your application will be reviewed by the Supply Chain Solutions team. Should we have any additional questions we will contact you directly for further discussions before progressing your application.
>
> On satisfactory completion you will receive an email containing your login details and you will be asked to create a password. Please keep these safe for future use.
>
> Please be aware that before a purchase order can be raised you will need to log in to CBRE mySupplier using your login details and check that you have “Published” status on the portal.
>
> Without updated documentation, you will not be compliant, and CBRE will not trade with suppliers in this status.

2. Open https://mysupplier.cbre.com/ via Google Chrome, if **profile already submitted once**,
3. Log in using your **primary email address** or **username** auto-generated upon the first submission,
4. You may also choose a different language in the right top corner.

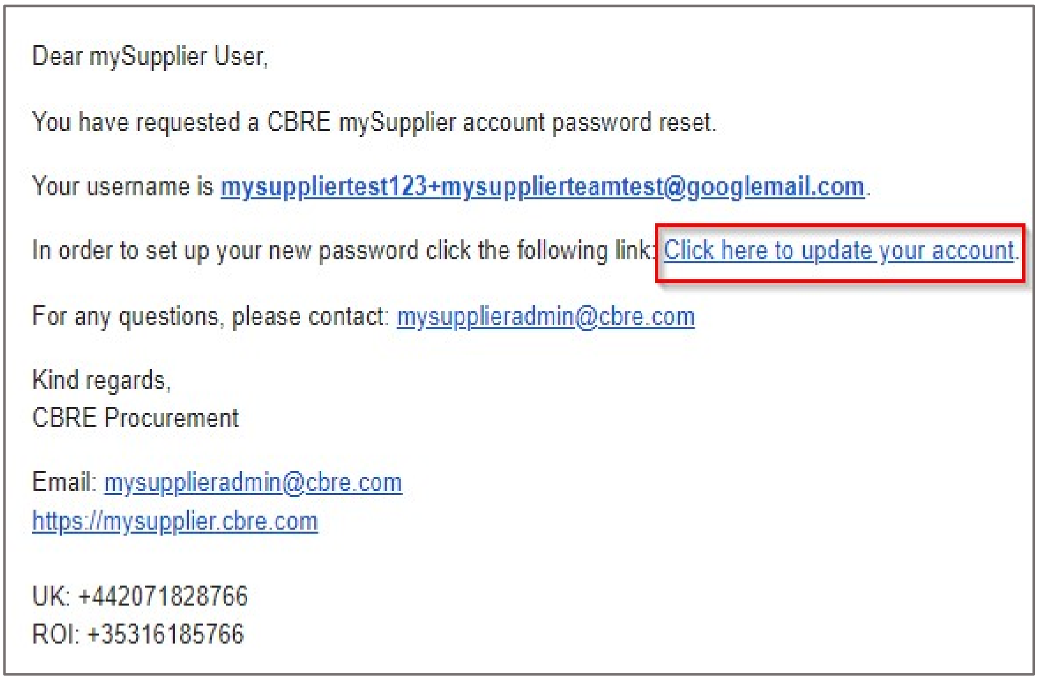


What do I do if I forget my username/password?

1. In that case click on the "Forgot Username or Password" link in the logon page and **enter your primary email address or username** and Submit; if you have provided a correct email address or username, you will receive the password reset email,



2. In the next step open the email and click on the "Click here to update your account" link,



Dear mySupplier User,

You have requested a CBRE mySupplier account password reset.

Your username is **mysuppliertest123+mysupplierteamtest@googlemail.com**.

In order to set up your new password click the following link: Click here to update your account.

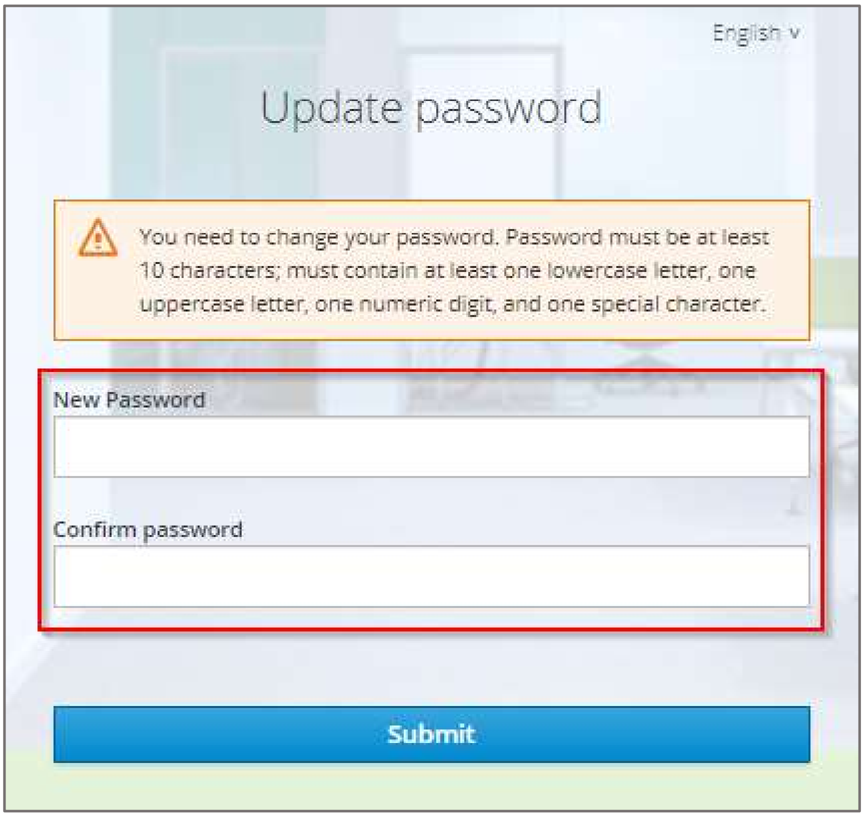
For any questions, please contact: mysupplieradmin@cbre.com

Kind regards,
CBRE Procurement

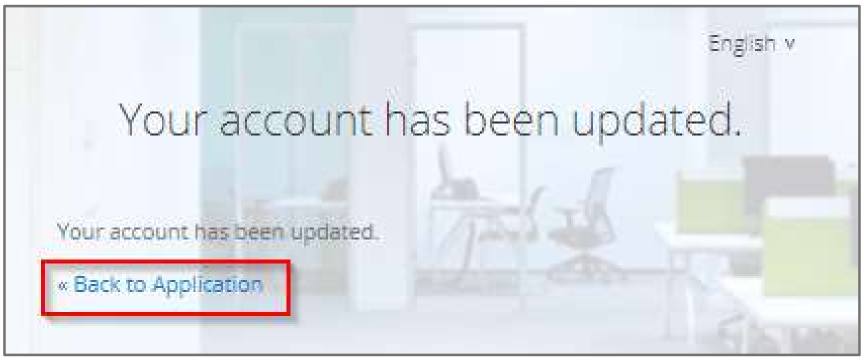
Email: mysupplieradmin@cbre.com
https://mysupplier.cbre.com

UK: +442071828766
ROI: +35316185766

3. Set up your new password by entering it twice and Submit; you will then receive the password update confirmation,



4. In order to log into your profile, click on the "Back to Application" link.



Why am I not receiving the password reset email?

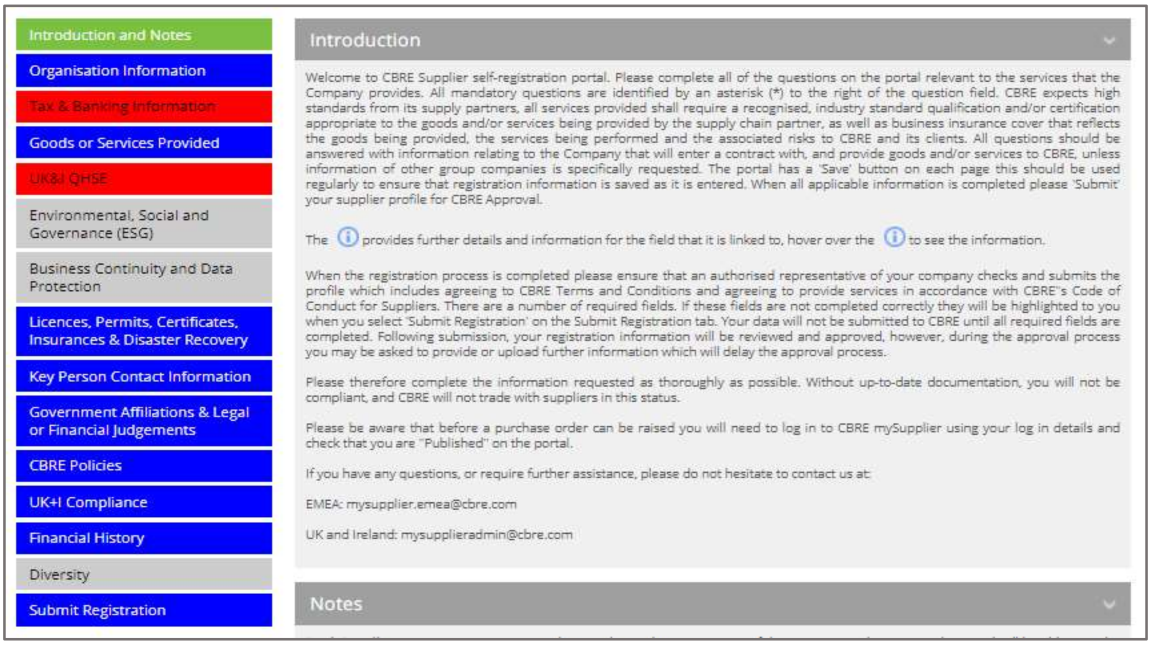
It is possible that you are expecting to receive the reset email to a different email address than the primary email address set up in your mySupplier profile. In that case please contact the **mySupplier Technical Support** mySuppliertechsupport@cbre.com. Should that not be the case, please make sure both email addresses mySuppliertechsupport@cbre.com and mysupplieradmin@cbre.com are **whitelisted by your company, which means adding these to your company safe senders list.**

How to navigate my profile on mySupplier?

In order to view your mySupplier profile, click on the “Registration and Compliance” menu at the top. On the left hand-side you will see **your current status and additional advice** that might be essential when completing or updating your profile.

Below the status you will see the tabs that need to be completed. There are three tabs colours:

- **red** – indicate the tabs that require update,
- **blue** – indicate the tabs that have been updated within the recent profile submission,
- **grey** – indicate the tabs that have been updated before.



IMPORTANT: In case there are no tabs highlighted in red, before you start updating your profile, please go to Submit Registration tab at the bottom of the tabs list, click “Re-Submit Registration” button and wait until the page gets re-loaded. The tabs with the outstanding data will be instantly highlighted in red.

What does my profile status mean?

Status on mySupplier	Onboarding stage	Description	Potential risks that may delay onboarding	Action owner
Invited	**Invitation to Register sent to the Supplier**	Registration link sent to supplier's email address provided in the request form, supplier needs to complete and submit the profile	Incorrect email address or invitation email is routed to supplier's spam folder	Supplier
Awaiting publication	**Supplier's profile review**	Supplier completed or updated their registration form on the portal, supplier profile is reviewed by mySupplier Team	Incorrect letterhead as well as the company and banking details on the supplier's profile, compliance requirements not fulfilled	mySupplier Administrator
Awaiting Onboarding to Payment System	**Supplier approved and awaiting setup in the financial system**	mySupplier Team approved supplier submission, VMF Team is creating supplier's account in the financial system		VMF Administrator
Published	**Supplier setup in the financial system**	Supplier fully compliant and the account is created in the financial system		VMF Team Administrator (if not active in AX)
Re-Apply	**Supplier was asked for an update by mySUPPLIER team**	mySupplier Team sent supplier a request to update their profile on mySupplier with additional information, awaiting supplier's update	Supplier's contact email address is no longer valid or email is routed to supplier's spam folder	Supplier
Non-compliant	**Supplier's profile gets expired**	Supplier automatically notified about the document's expiry, awaiting supplier's update	Supplier's contact email address is no longer valid or email is routed to supplier's spam folder	Supplier

When is my action required on mySupplier profile?

Your action is required on your profile in case your profile is in one of the following statuses:

- **invited** – indicates that you have been requested to register on mySupplier and CBRE is awaiting the first submission of your profile,
- **re-apply** – indicates that you have been asked for additional information to be updated on your profile and submitted,
- **non-compliant** – indicates that some information got expired on your profile and needs to be updated and submitted.

How will I know I need to complete or update my profile?

We will notify you by **email sent to your primary email address** that there is an action required. There is number of notifications sent to suppliers on different occasions:

- **you are invited to mySupplier** – you will receive an email with a link to register; if the link is not used timely, it may expire after some time; in that case mySupplier Team can resend it,
- **you are requested to provide further information or update your profile** – you will receive an email with a request to log into your profile and update it,
- **your documents are about to expire** – some of the documents on your profile are about to expire and you will receive a notification 14, 5 and a day before the expiry of your documents,
- **your profile is about to expire** – some of the documents on your profile have expired and you are granted a 21-day grace period to update the documents in order to keep your profile updated,
- **your profile got expired** – some of the documents on your profile got expired, the 21-day grace period has passed by and you will receive an auto-notification with a request to log into your profile and update it.

IMPORTANT: Once your profile gets expired, your account in the CBRE financial system is put on hold for purchase orders. Therefore, you cannot receive any new purchase orders by the time your profile is updated and fully compliant.

How to fill out the mySupplier profile?

There are number of **mandatory questions marked with a red asterix** (*) which you need to answer in order to be able to submit your profile. In the following sections you will find clear instructions on how to fill out each tab on you profile. **We strongly recommend saving your progress** with the "Save" button at the bottom of the tab page once it is completed and before you move onto the next one.

Organisation Information

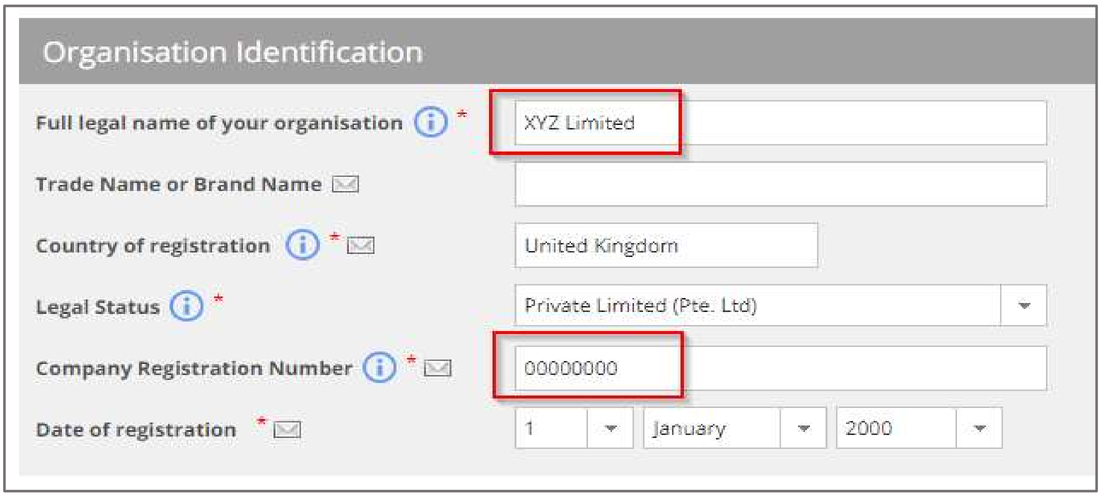
The information completed in the Organisation Identification section helps us identify your company from the legal point of view. Bear in mind, that we verify that data with other source of information like official company registers: **Companies House for United Kingdom** (https://find-and-update.company-information.service.gov.uk/) and **Company Registration Office for Republic of Ireland (**https://search.cro.ie/company/CompanySearch.aspx).

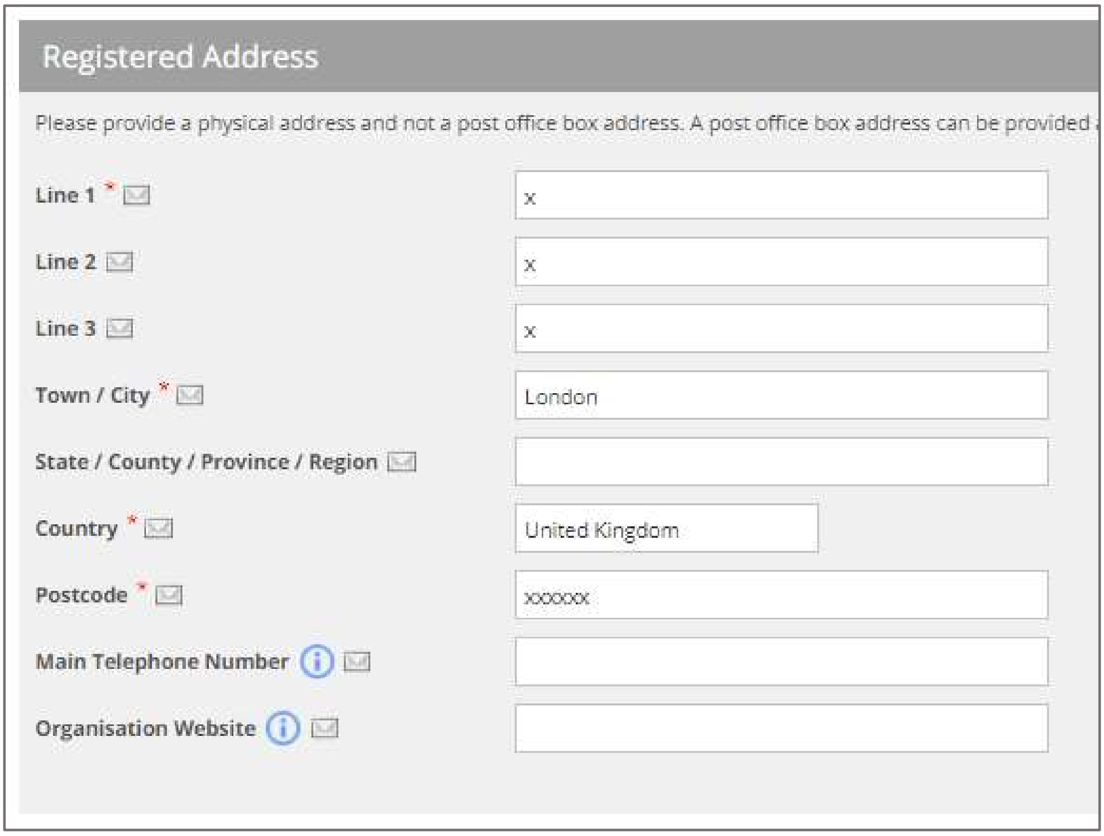
The following details specifically will be checked against official registers:

- Legal name,
- Company Registration Number,
- Registered address

mySupplier

Therefore, please **make sure that you provide the same details on your profile**. Furthermore, the above details **need to be included in your official letterhead with banking details** and uploaded on your profile.





Also please complete the other sections in the Organisation Information tab: **Ownership Information**, **Use of Subcontractors**, **Existing organisational relationship or staff connections with CBRE**, which will support us with further review of your company profile.

mySupplier

Tax and Banking Information

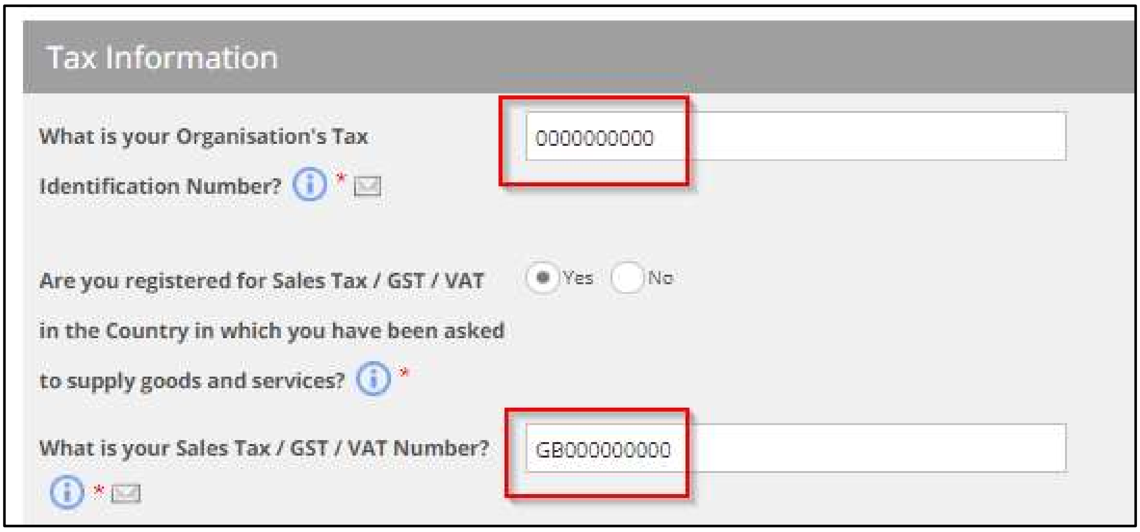
Along with your organization identification information, **this is the most important section** that you will need to complete on your profile. Based on these details **CBRE will be able to make payments to your company**.

In the **Tax Information section** we will ask you to provide your **Organisation's Tax Identification Number** (called a Unique Tax Reference number in UK) and **Sales Tax Number** (VAT Number). VAT should always begin with the county-specific code e.g. GB or IE. Find more about VAT Numbers in EU on this webpage: https://ec.europa.eu/taxation_customs/business/vat/eu-vat-rules-topic/vat-identification-numbers_en

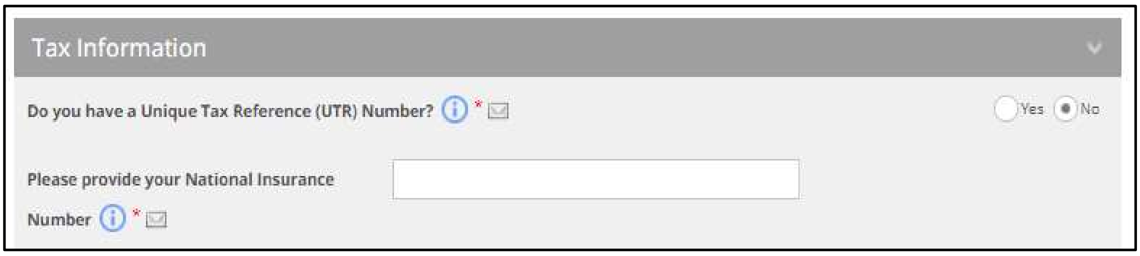
The following details will be checked against VIES. You may validate your VAT Number on this webpage (https://ec.europa.eu/taxation_customs/vies/vieshome.do?selectedLanguage=EN):

- Legal name,
- VAT Number.

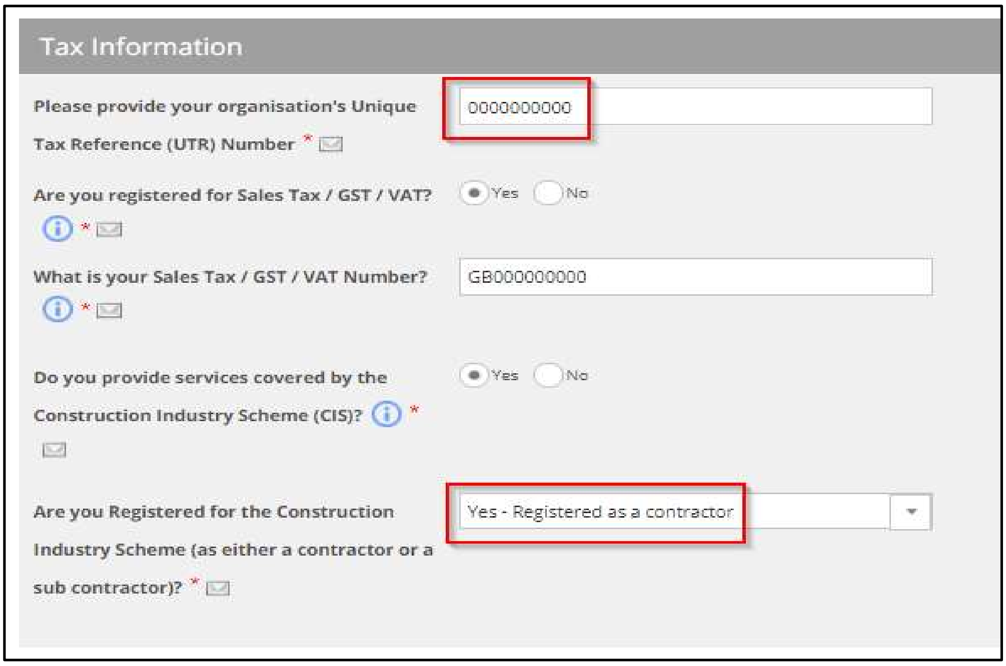
Therefore, please **make sure that you provide the same details on your profile.** Furthermore, the above details need to be **included in your official letterhead with banking details** and uploaded on your profile.



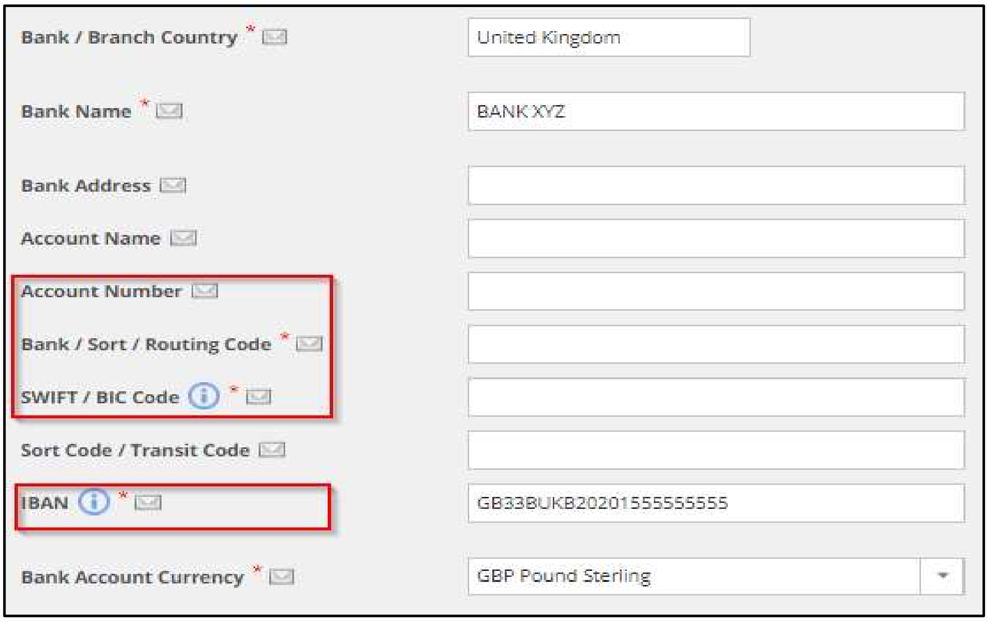
Bear in mind that if you are a sole trader in UK and do not hold a UTR, we will ask you to provide your National Insurance Number. Please remember that your NIN need to be **included in your official letterhead with banking details** and uploaded on your profile.



If you are a **UK supplier registered for the Construction Industry Scheme**, we will check your **UTR Number against the HMRC database**. Bear in mind, that in case of negative verification in HMRC, we will not be able to process payment to your company. Therefore, make sure that your UTR Number **contains 10 digits only without spaces and special characters**. Furthermore, the above details need to be **included in your official letterhead with banking details** and uploaded on your profile.



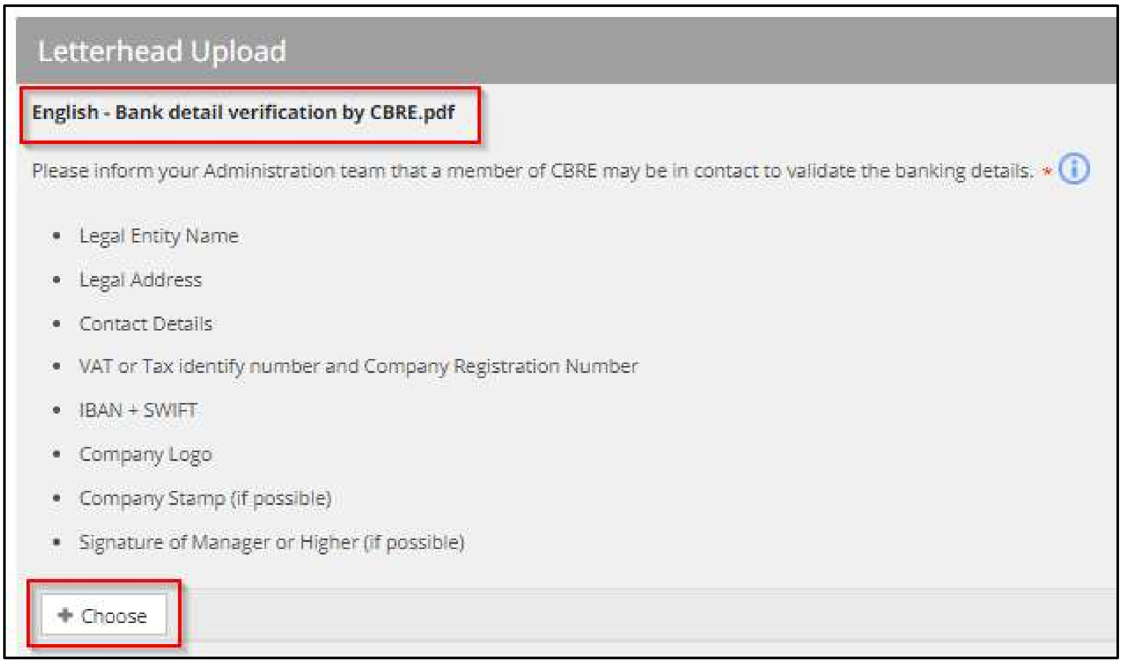
Banking Details section requires your highest attention. Here you will need to provide your banking details, specifically your **IBAN and SWIFT/BIC Code**. These need to be **included in your official letterhead with banking details** and uploaded on your profile. **Account Number**, **Sort Code** and **SWIFT/BIC Code** should match the **IBAN**.



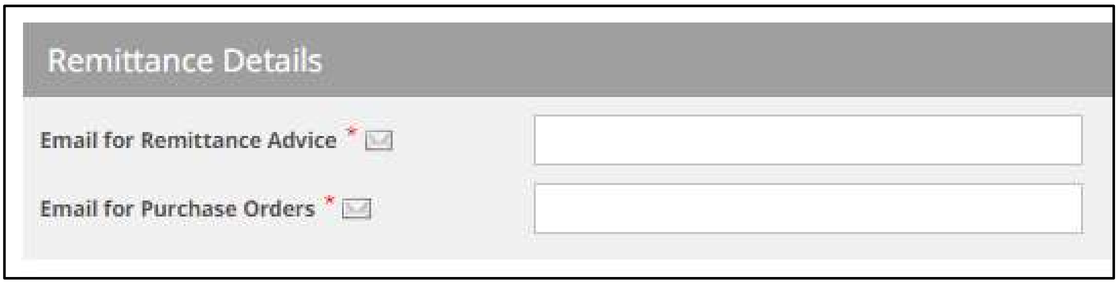
Also please make sure that the IBAN begins with the country-specific code e.g. GB or IE. Find more about **IBAN format** on this webpage: https://www.iban.com/structure. Find more about **SWIFT/BIC Code** and check whether it is correct on this webpage: https://transferwise.com/gb/swift-codes/bic-swift-code-checker. If you are still not sure whether your banking details are correct, we strongly recommend contacting your bank.

IMPORTANT: CBRE pays the highest attention within the onboarding process when it comes to Banking Details correctness. Make sure all details listed below are included in your company letterhead and match the ones provided in sections covered above: Organisation Identification, Tax Information and Banking Details. In case of any missing information on your letterhead or mismatch between letterhead and details filled in the sections your profile will be rejected.

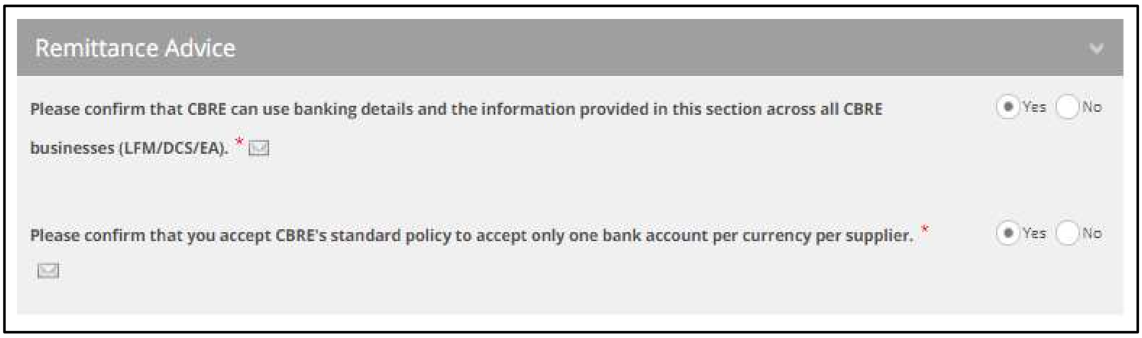
Please include all below listed details on your letterhead and upload it in the Letterhead Upload section. We strongly recommend familiarizing yourself with the **Banking Details Verification Process** by clicking on the link in the Letterhead Upload section.



In the **Remittance Details section** you are asked to provide your correct email addresses.



In the following section you will need to answer "Yes" to become a supplier to CBRE.

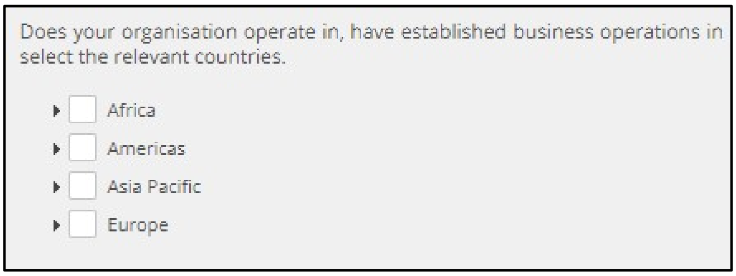


If you are not using CBRE Tradex system to submit invoices to CBRE yet, you will be asked for contact details so that CBRE could contact you and discuss further how to use Tradex.

Goods or Services Provided

In this tab you will need to answer questions in relation on where and what goods or services you provide to CBRE or its Clients. Therefore, in the **Geographic Scope section**, please select the **regions within the country your company deliver within to CBRE or its Clients**.

In the following part you will be asked about countries your company operate in general.



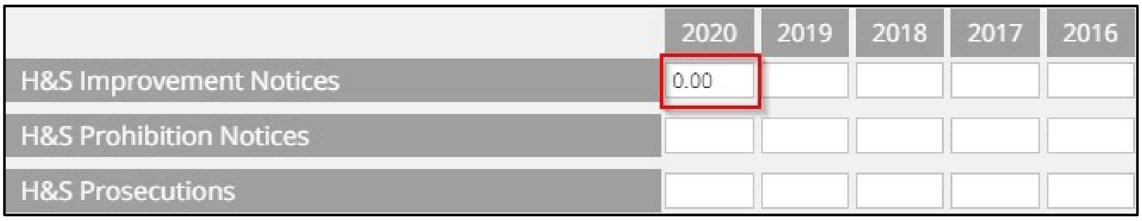
In the Goods or Services Provided section you are asked whether you provide services, goods or both, and **whether you provide any professional, consulting or design services**. In the service and goods categories list, please select the **categories that best reflect your business conducted with CBRE or its Clients.** Simply click on the little arrow and the sub-categories will show up. There are up to 3 levels of categories in each of the 6 main visible categories.

The last section called **Keyword Search** is the place where you can **specify your business type as well as goods or services you provide** in words to give us even better understanding of your business.

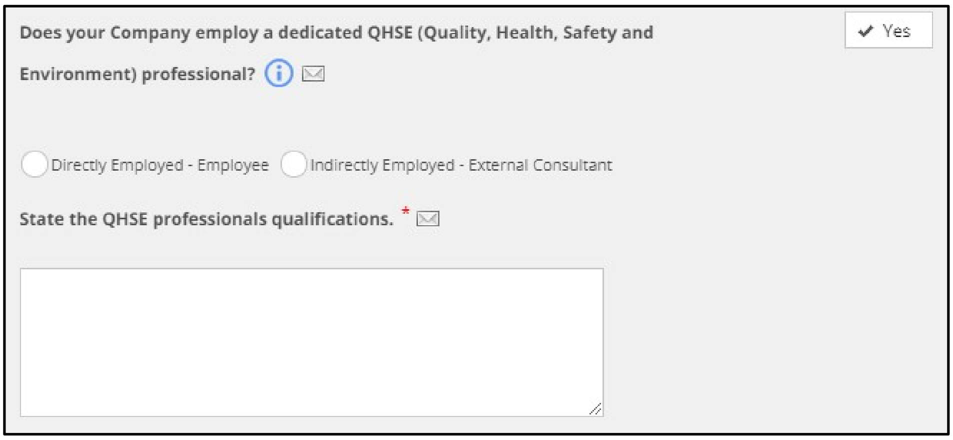
UK&I QHSE

QHSE section is where we ask you about H&S-related areas. In the first question you are required to upload the **health and safety policy** (for United Kingdom) or **safety statement** (for the Republic of Ireland) **submitted in the past 12 months in accordance with legal requirements in your country**. The document should be **signed and dated** with the last or next review date so that we could understand whether it is still valid.

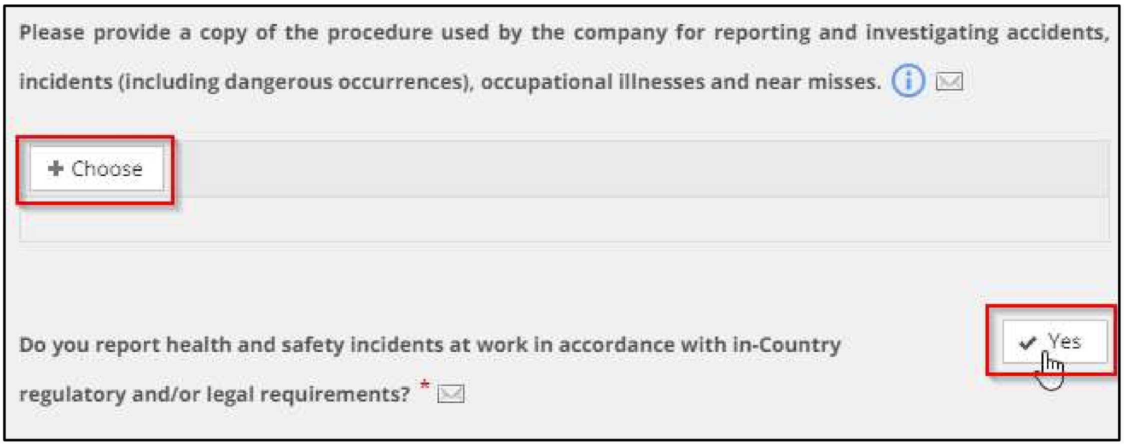
Below you will find **accident table** where you will need to provide **number of incidents** for each of 13 categories. The number provided in each field should represent a value in relation to 100. If there are 0 incidents, please enter 0 in a relevant field.



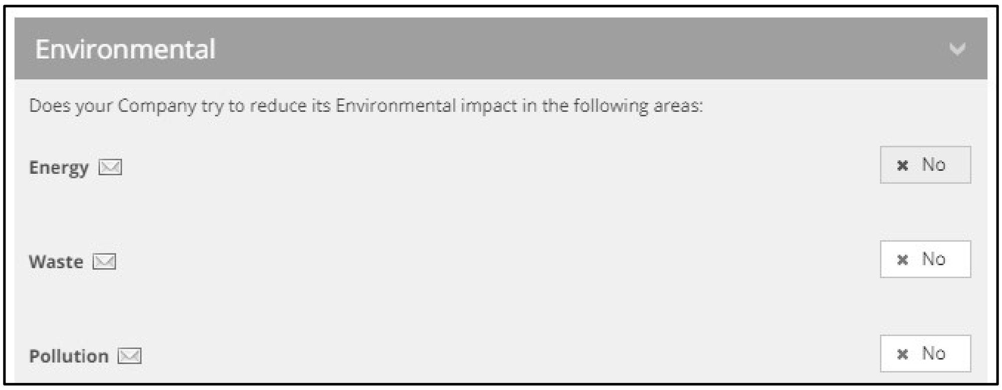
In this following question you will need to state whether your **company employ a dedicated QHSE professional and what are their qualifications**. Bear in mind that according to the legal regulations in the Republic of Ireland it is mandatory to employ such professional. Therefore, **Irish suppliers need to answer "Yes" to this question and provide further details**.



In the last 2 questions in the **QHSE section** we ask about the **procedure of reporting incidents**. In the first one you will need to upload your company procedure and in the second one, please answer "Yes" in order to become a supplier to CBRE.



The second section called **Environmental** includes 11 non-mandatory questions in relation to **reducing environmental impact** in certain areas.



Environmental, Social and Governance

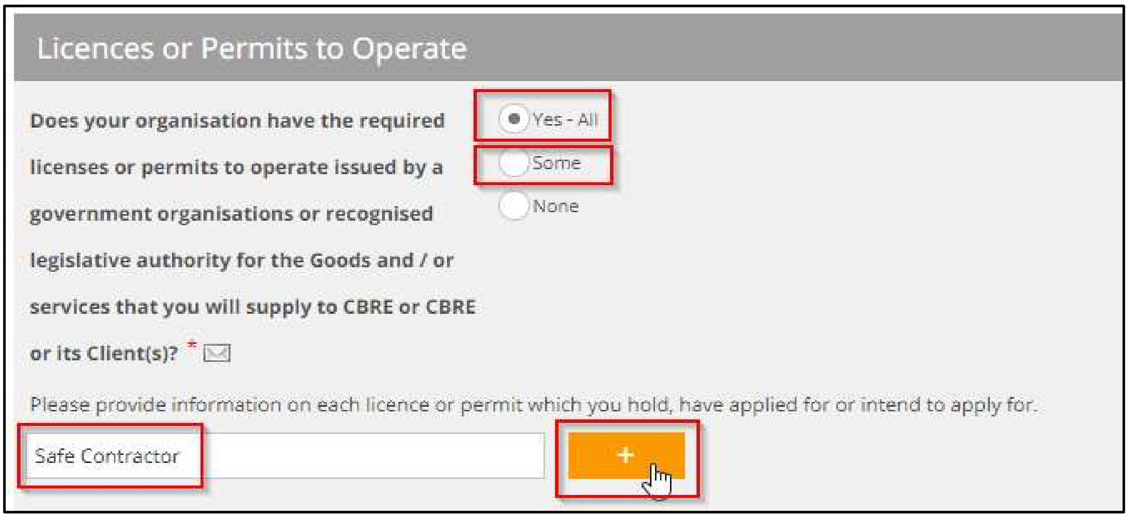
In this tab you will find **non-mandatory questions** on the above aspects divided into 8 sections.

Business Continuity and Data Protection

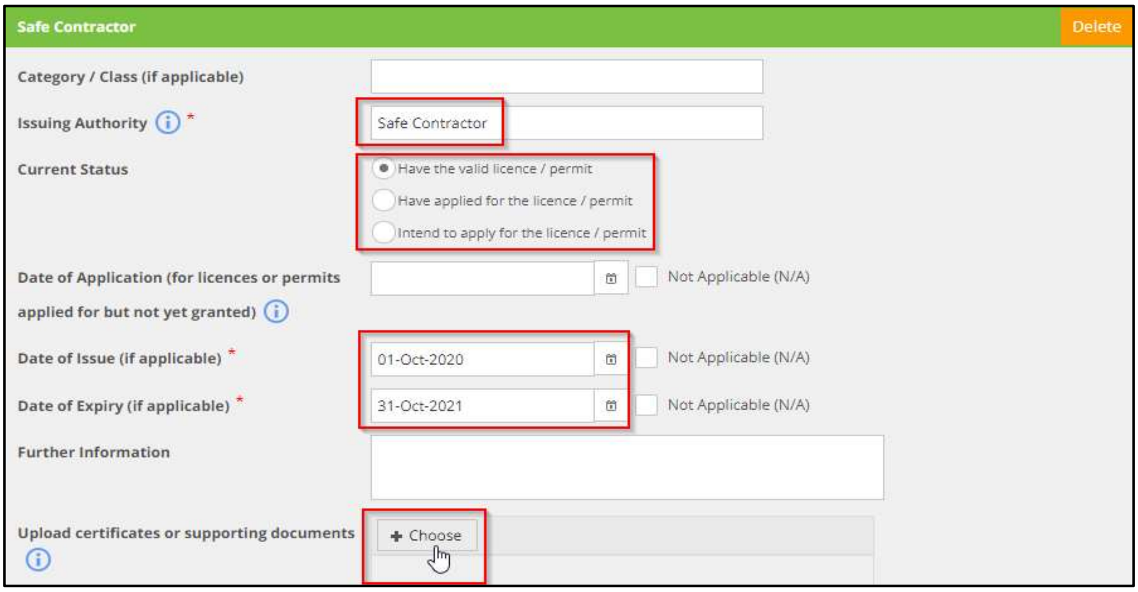
In this tab you will find **non-mandatory questions** on the above aspects divided into 2 sections.

Licences, Permits, Certificates, Insurances & Disaster Recovery

In the **Licences or Permits to Operate section** you are required to provide **information and supporting evidence for any licences, permits, certificates**. If you hold any accreditation, please select "Yes" or "Some" and enter the name of the accreditation and click on the "+" button.

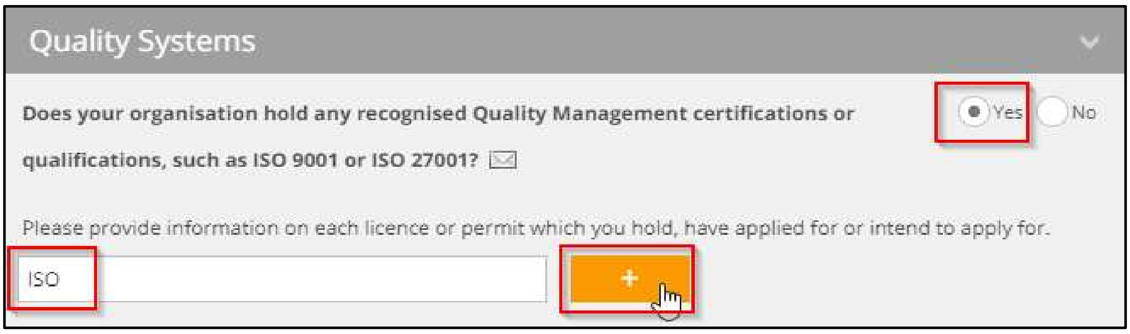


In the newly created section, please complete the information on the accreditation you specified. Make sure the **expiry date on the document matches the one you select in the section** relevant for that accreditation.



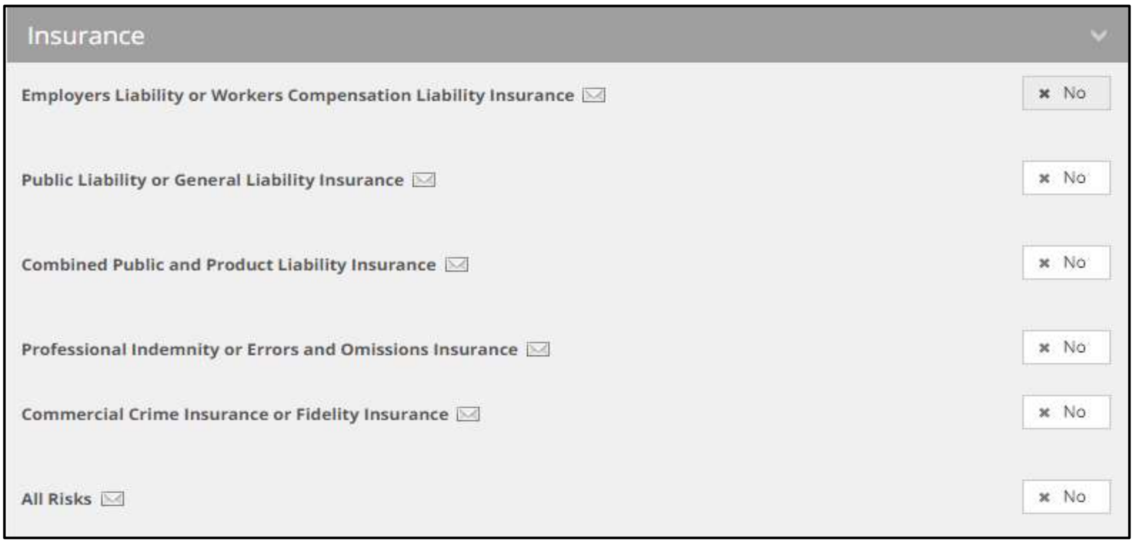
IMPORTANT: Bear in mind that there is specific accreditation required from suppliers in relation to various types of services provided to CBRE. You might be contacted again by mySupplier Team, should a certain requirement be unfulfilled.

In the **Quality Systems section** you may specify any Quality Management certifications that your company hold the same way as in the **Licences and Permits to Operate** section.

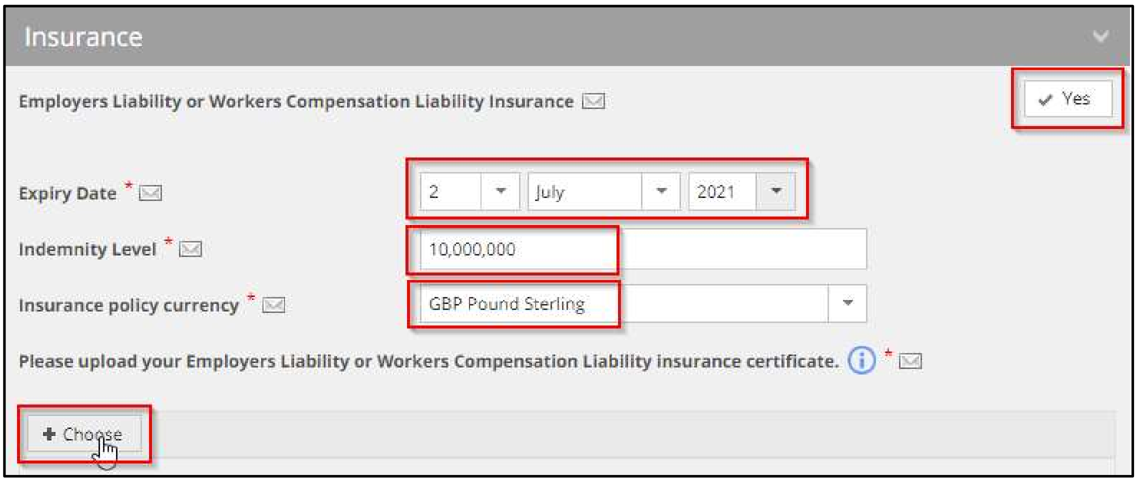


In the newly created section, please complete the information on the accreditation you specified. Make sure the **expiry date on the document matches the one you select in the section** relevant for that accreditation.

In the **Insurance section** you are required to upload your insurance policies. CBRE require most of the suppliers to hold the **Employers Liability** as well as **Public Liability** insurance policies. **Professional Indemnity** policy is required from professional, design and consultancy suppliers.

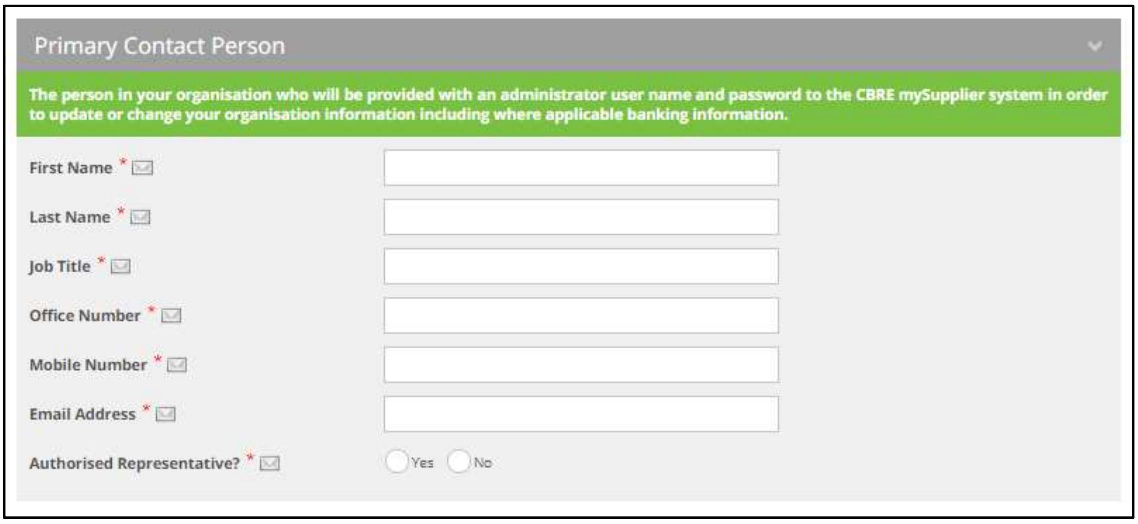


In order to upload an insurance policy, please **select "Yes" next to an insurance policy type** and complete the below details. Make sure the **expiry date on the document matches the one you select in the section** relevant for that insurance.



Key Person Contact Information

This tab is dedicated to your **contact details relevant for various roles** in your company. It is mandatory for you to complete the Primary Contact Person section. Primary contact is responsible for updating your company profile on mySupplier. Please **make sure the primary email address is correct and is monitored regularly** as mySupplier will be sending reminders and notifications on that one.

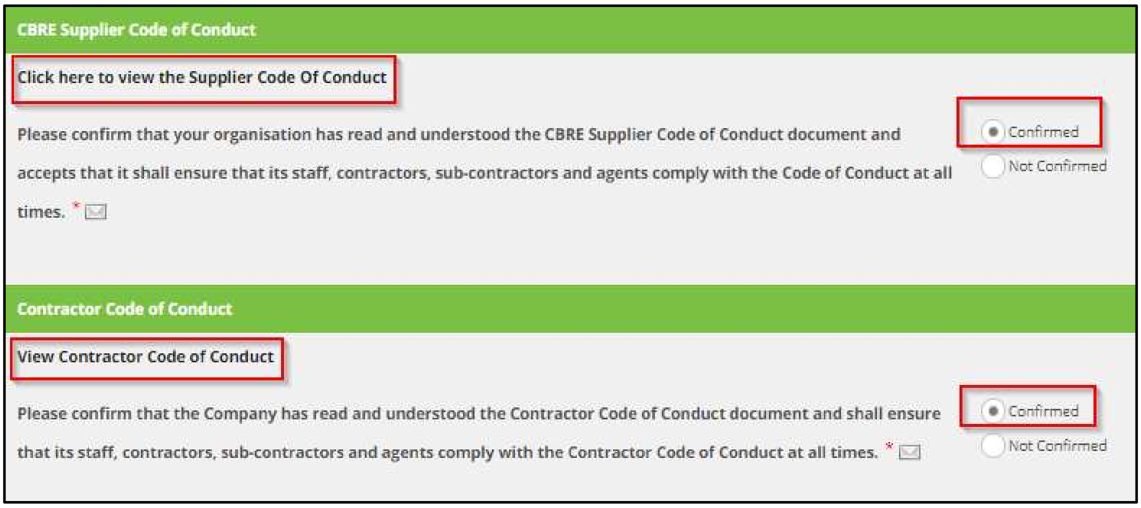


Government Affiliations and Legal or Financial Judgements

In this tab you will find **mandatory questions** on the above aspects divided into 3 sections.

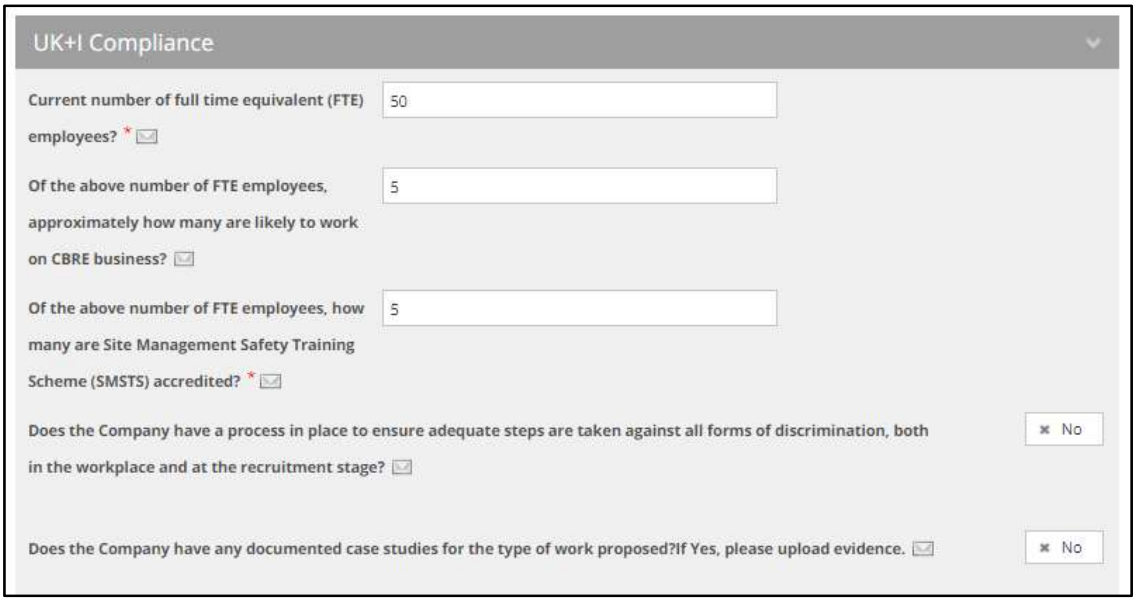
CBRE Policies

All sections within this tab **must only be completed by an Authorised Representative of your organisation**. Therefore, please contact them to log into your company profile on mySupplier and confirm these statements. **Each section contains a link to view the document to be confirmed.**



UK+I Compliance

In the **UK+I Compliance section** you will need to answer some mandatory questions related to **employee and recruitment** aspects.


UK+I Compliance

Current number of full time equivalent (FTE) employees? * — 50

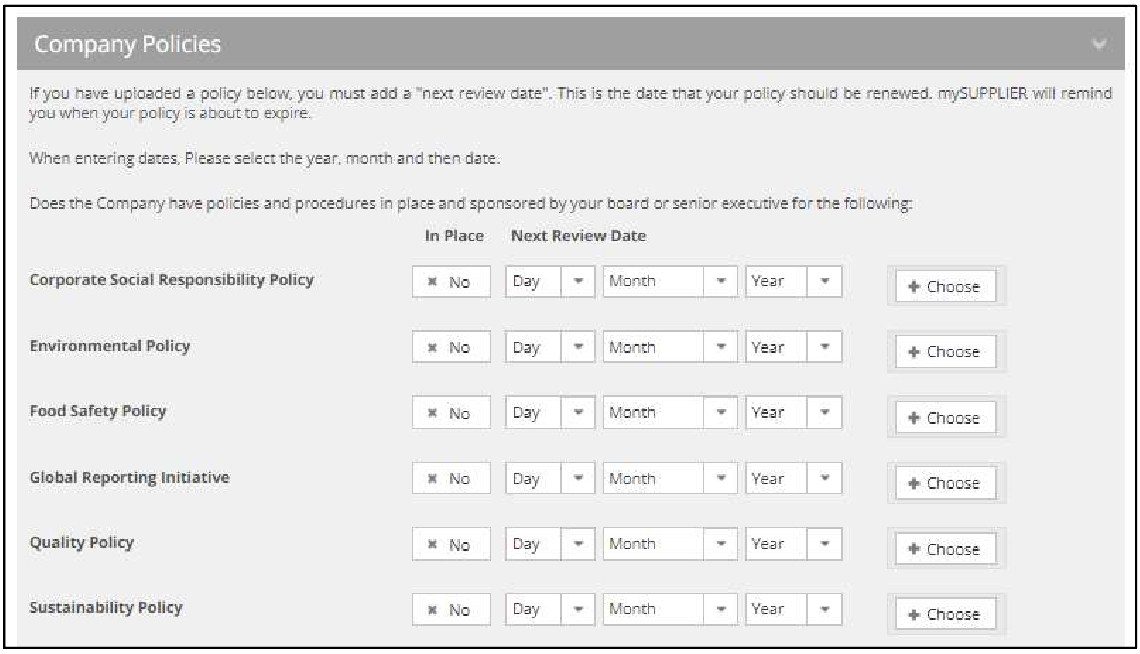
Of the above number of FTE employees, approximately how many are likely to work on CBRE business? — 5

Of the above number of FTE employees, how many are Site Management Safety Training Scheme (SMSTS) accredited? * — 5

Does the Company have a process in place to ensure adequate steps are taken against all forms of discrimination, both in the workplace and at the recruitment stage? — ✖ No

Does the Company have any documented case studies for the type of work proposed?If Yes, please upload evidence. — ✖ No

The **Company Policies section** is where you can upload your internal company policies.


Company Policies

If you have uploaded a policy below, you must add a "next review date". This is the date that your policy should be renewed. mySUPPLIER will remind you when your policy is about to expire.

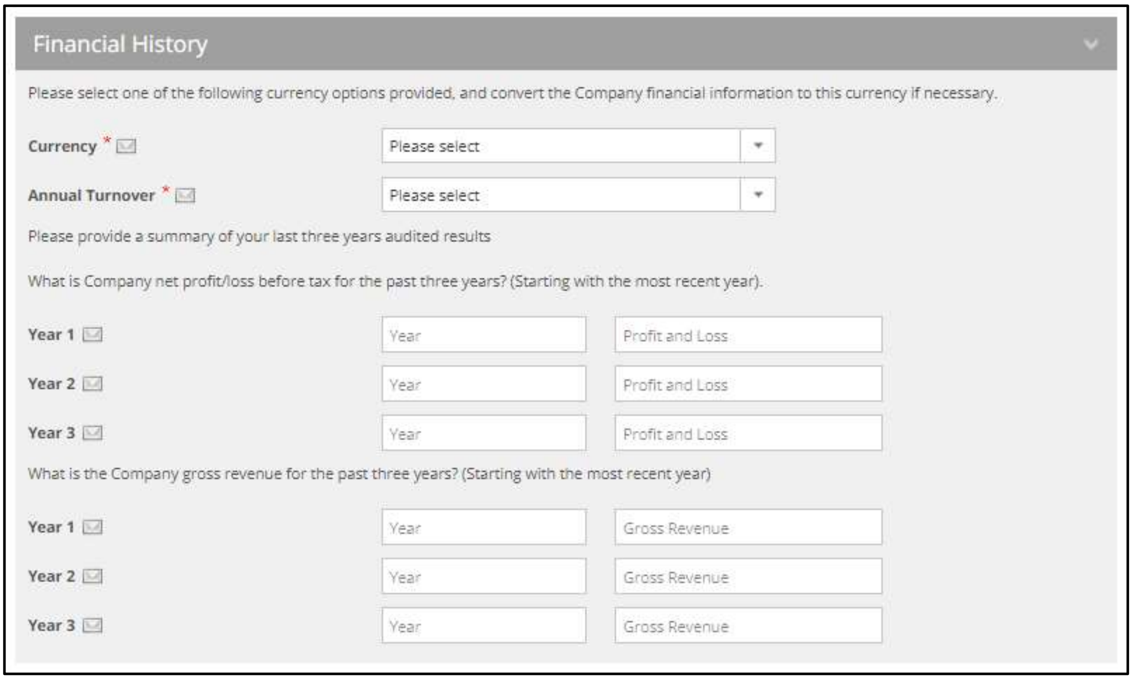
When entering dates, Please select the year, month and then date.

Does the Company have policies and procedures in place and sponsored by your board or senior executive for the following:

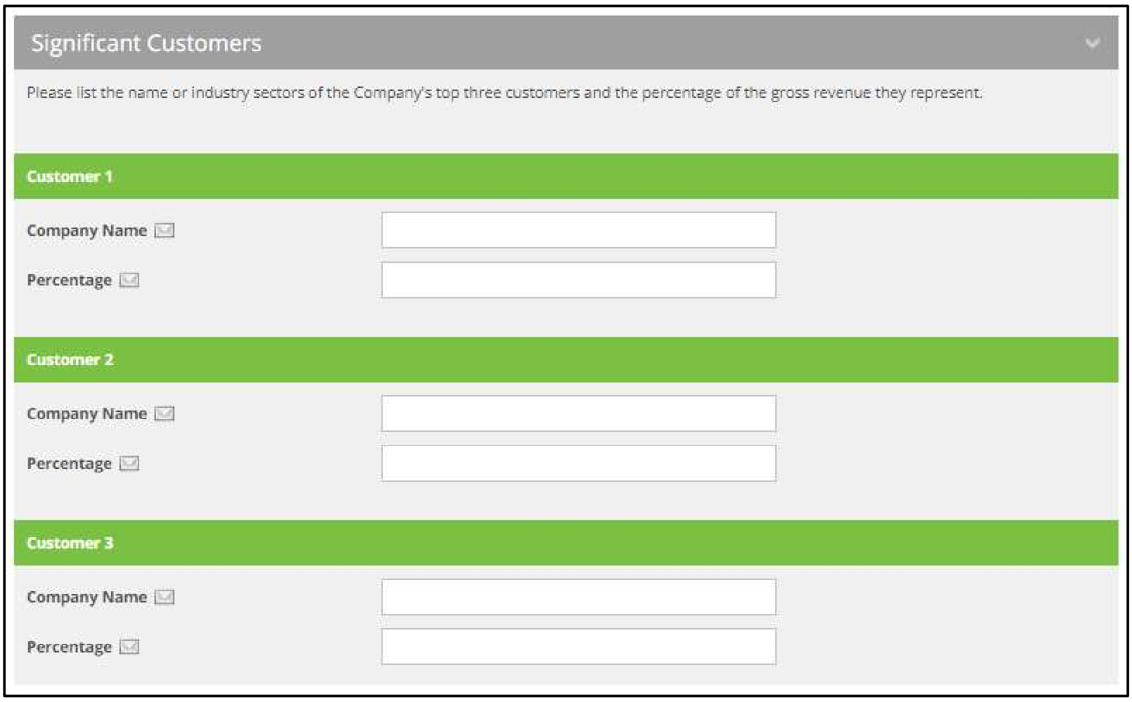
	In Place	Next Review Date			
Corporate Social Responsibility Policy	✖ No	Day	Month	Year	+ Choose
Environmental Policy	✖ No	Day	Month	Year	+ Choose
Food Safety Policy	✖ No	Day	Month	Year	+ Choose
Global Reporting Initiative	✖ No	Day	Month	Year	+ Choose
Quality Policy	✖ No	Day	Month	Year	+ Choose
Sustainability Policy	✖ No	Day	Month	Year	+ Choose

Financial History

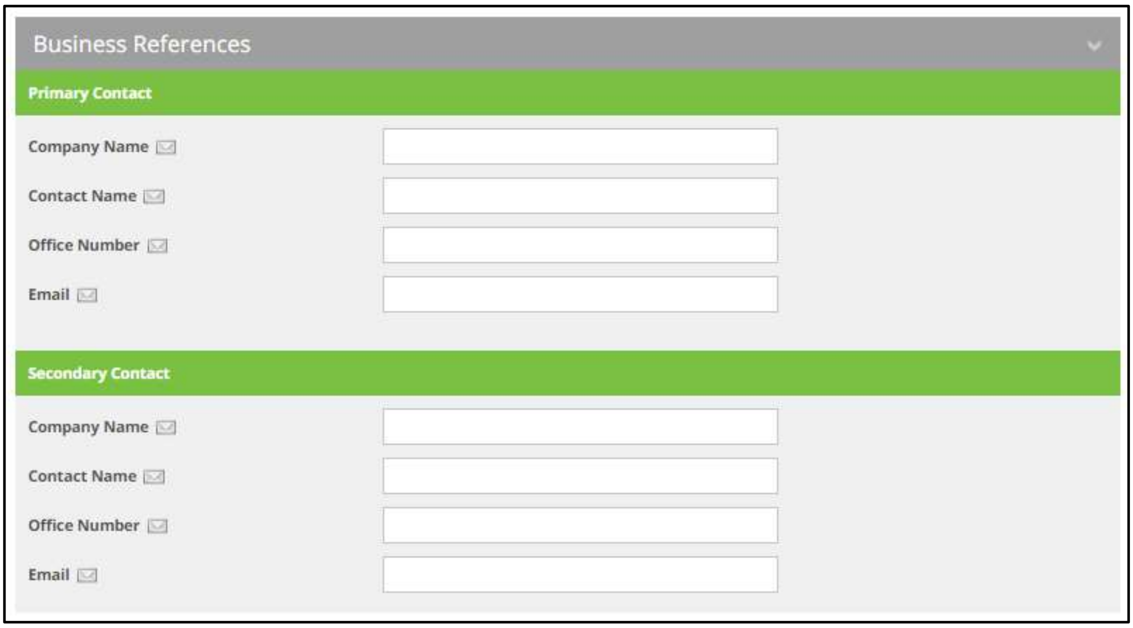
In this section you will need to provide your financial data like **annual turnover** as well as **net profit/loss before tax for the past three years**, starting with the most recent year.



In the **Significant Customers** section please list **names or industry sectors** along with the **percentage of the gross revenue** for your company's **top three customers**.



In the **Business References section** you can provide your 2 business references with the contact details.

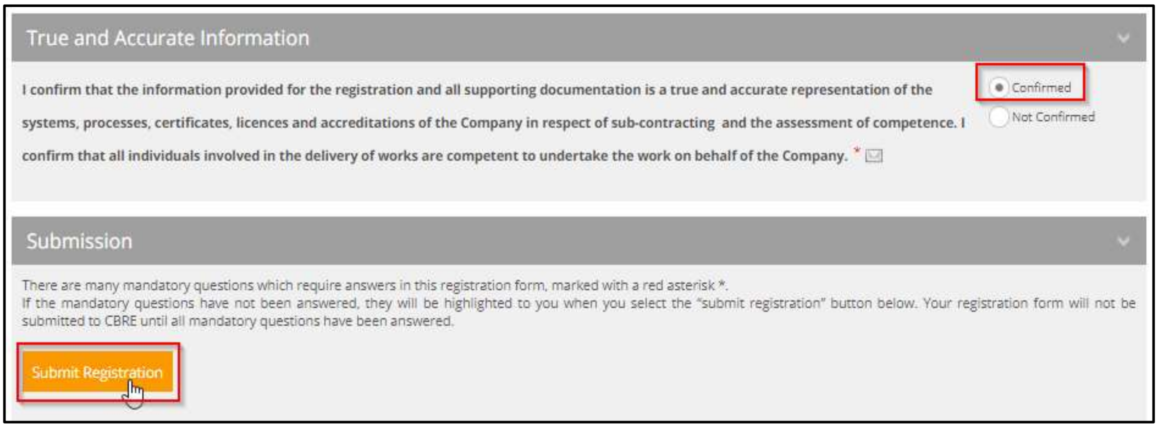


Diversity

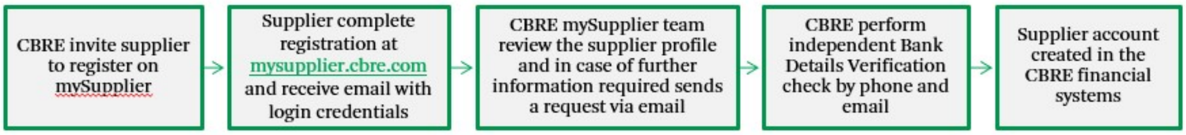
In this tab you will find **non-mandatory questions** on the above aspects divided into 6 sections.

Submit Registration

Last but not least, this is the tab where you **submit your profile data to mySupplier Team** by confirming **you have provided true and accurate data** and **clicking the "Submit Registration" button**. It is important that you submit your profile and receive a confirmation on your screen, otherwise we will not get notified about the submission and your profile will be visible to us as incomplete.



What are the steps in the CBRE supplier onboarding process?



Where can I find additional instructions and user guides?

We strongly encourage you to check the **News Articles section** in the right top corner of the mySupplier webpage. You will find there the **latest updates on mySupplier portal as well as guides** on the following topics:

- How to register on mySupplier,
- Supplier Banking Details verification process,
- How to submit invoices to CBRE.

You may find additional information or answers to the Frequently Asked Questions in the **Help tab**.

Who are my points of contact?

- If you **need access to mySupplier** or are experiencing any **technical issues**, please email the mySupplier Technical Support at mySuppliertechsupport@cbre.com.
- For any **onboarding-related queries**, please email mySupplieradmin@cbre.com.